Cornerstone Oct 2015 Release Notes

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What's New for October 2015

What's New for October 2015

The following new features and enhancements are available for the October 2015 release as of 30 October 2015:

Compensation Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
Configurable Visibility of Component Budgets	Configurable Visibility of Component Budgets		With this enhancement, administrators are able to hide any unneeded budgets from the Budget Summary, Compensation Dashboard, Roll-up Summary, Plan Summary, Pending Approvals, Summary tab, and Approve Compensation Plans tab.
Load up to 50 Users per Plan Page	Load up to 50 Users per Plan Page		With this enhancement, up to 50 users will automatically display when a compensation plan is opened. In addition, compensation managers have the option to change how many users are displayed per page.
Promoted Link in Compensation Plan	Promoted Link in Compensation Plan		With this enhancement, when a Compensation Manager promotes an employee to an organizational unit (OU) in a compensation Plan, then a **Promoted** link will appear in the user's User Card. The **Promoted** link only displays if a Promotion component is added to the task, and **Include Promotion Criteria** is selected in the compensation template. The link will be visible in the Base tab and the Approve Compensation Plans/Summary tab.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
User Records Administration - Employee Salary			With this enhancement, a new Employee Salary icon is available in the Options column of User Records Administration page. This option is available to administrators who have permission to view users and manage employee salaries. Selecting this option opens the Employee Salary Management page for the user. There, the administrator can add, remove, and update the user's salaries.
View Average Merit Increases	View Average Merit Increases	Yes	With this enhancement, compensation managers and approvers may have easy access to view the average merit increase in a compensation task. The average merit increase percentage can be viewed per component and per organizational unit (OU). This assists in enabling compensation managers to allocate within a definitive average merit increase allocation during compensation planning.

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

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			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.*
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 and Topic Availability Selection Criteria			With this enhancement, when editing a topic or a community, the Availability Selection Criteria section now displays the creator

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			constraints that are automatically applied to the community or topic's availability. This enables administrator, community moderators, and topic moderators to fully understand the availability of the community or topic. If the constraints change, then the updated constraints are displayed.
Connect Email Digests	Connect Email Digests		With this enhancement, new email digest sections are available for Connect. This enhancement reduces the number of emails a user receives and lowers the chance that an email notification is missed.
Edit Availability Knowledge Bank/Communities			With this enhancement, a new Edit Availability Knowledge Bank/Communities permission is available, which enables users to configure the availability of communities and topics. Users with this permission must also be a community moderator or topic moderator in order to edit the community or topic. Users can edit community and topic availability if they have either the Manage Knowledge Bank/Communities

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			Administration or Edit Availability Knowledge Bank/Communities permission.
Following in Connect Redesign	Following in Connect Redesign		With this enhancement, users may choose to follow Connect communities, topics, postings, and authors. New email triggers are available to notify users of new postings and replies to items the user is following. New postings from authors, topics, and communities the user is following may appear in the Live Feed. Also, Universal Profile is enhanced to allow users to easily view all of the items a user is following and all of the postings a user has created.
Join Community			With this enhancement, if a user navigates to a topic or posting that belongs to a community of which the user is not a member and the community is available to the user, then the user is given the option to join the community in order to view the topic or posting. This applies to all communities, but does not impact the Knowledge Bank.
Connect Communities Custom Report	Connect Communities Custom Report		The Connect Communities Report is a new custom report that allows users to report on communities in

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			New Connect and customize these reports in various configurable visual representations.

Learning Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
Adding Instructors in Adobe Connect vILT Sessions	Adding Instructors in Adobe Connect vILT Sessions		With this enhancement, when an instructor is selected for an Adobe Connect vILT session, the instructor is automatically designated as a host for the Adobe Connect session.
Browse for Training - Courses for You	Browse for Training - Courses for You		With this enhancement, Browse for Training is taken to the next level with course-specific thumbnail images to communicate the nature of the course. Additionally, Browse for Training can now present learners with content based on their personalized list of interested subjects. These enhancements make the learning experience more collaborative and

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			engaging.
Central Material Administration	Central Material Administration		With this enhancement, the administration of material learning objects (LOs) is enhanced. A new Material Administration page enables administrators to create, view, search, and edit materials. Administrators can also create new versions of materials. A new Material Type Administration page enables administrators to create, view, and edit material types. Also, the process of creating and editing a material is expanded to enable administrators to configure availability and emails for the material.
Collaborative Learning - Mark Cohort as Inactive	Collaborative Learning - Mark Cohort as Inactive		With this enhancement, inactive cohorts are automatically hidden on the Manage Cohorts page, and administrators have the option to view inactive cohorts. Administrators can easily inactivate cohorts directly from

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			the Manage Cohorts page. Inactive cohort communities will be hidden for all cohort members and on the All Communities page.
Constraints on Track Employees Sections on Standard Reports	Constraints on Track Employees Sections on Standard Reports		With this enhancement, constraints are added to the permissions for the following Track Employees standard reports: ○ Records Report ○ Session Withdrawal Report ○ Training Progress Pie Chart Report ○ Training Status Summary Report ○ Transcripts Report
Course Catalog - Evaluations Tab Save Enhancement	Course Catalog - Evaluations Tab Save Enhancement		With this enhancement, when editing a LO in the Course Catalog, any modifications on the Evaluations tab are not saved until the administrator intentionally saves the changes by clicking the **SAVE** button.
Create Materials Web Service (REST)	Create Materials Web Service (REST)	Contact Cornerstone via a GPS case to enable this new web service.	With this enhancement, a new Create Material LOs web service is now available. This web

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			service enables administrators to create material learning objects (LOs) via REST Web Services. This facilitates the creation of bulk material LOs.
Curriculum Completion Percentage in Custom Reports	Curriculum Completion Percentage in Custom Reports		With this enhancement, a **Curriculum Completion Percentage** field is added to the custom Transcript report to enable reporting on the completion percentage of curricula. The completion percentage for each user is calculated once the user opens the curriculum in the Curricula Player.
Custom Transaction Fields Usability Enhancements Overview	Custom Transaction Fields Usability Enhancements Overview		With this enhancement, an OU (organizational unit) Field type is added to the **Type** option when configuring Transaction custom fields. This field type enables administrators to include an OU picker to the field.
Enhanced GetDetails Web Service	Enhanced GetDetails Web Service	Automatically enabled when specific web service is in	With this enhancement, the GetDetails web service

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
		use. If not already enabled, contact Cornerstone via a GPS case to enable this web service.	is enhanced to include the following: ○ Available Languages - The web service response now includes the languages in which the learning object (LO) is available.
Enhanced Post-work and Pre-work Fields	Enhanced Post-work and Pre-work Fields		With this enhancement, Post-work and Pre-work fields will now provide more accurate data to be used within custom Training reports.
Enhanced Training Progress Summary Pie Chart	Enhanced Training Progress Summary Pie Chart		With this enhancement, the Training Progress Summary Pie Chart and Dashboard are enhanced to add additional options on the Report Criteria Page.
Enhanced TranscriptAndTask Web Service		Automatically enabled when specific web service is in use. If not already enabled, contact Cornerstone via a GPS case to enable this web service.	With this enhancement, the TranscriptAndTask web service is enhanced to include the following: ○ Training Hours for LOs within a curriculum - The web service response now includes a training

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			hours value for LOs that are within a curriculum on the user's transcript.
Enhanced WebEx vILT SSO	Enhanced WebEx vILT SSO	Yes	With this enhancement, the WebEx vILT SSO functionality is enhanced to include WebEx SSO Partner Delegated Authentication (PDA). This enables organizations to use their own SSO provider or have no SSO provider for their WebEx portal.
Material Versioning	Material Versioning		With this enhancement, materials now support versioning. As materials need to be updated, administrators can manage incremental versions of materials. Administrators can also choose to assign a reversioned material to users who have the material on their transcript, including users who have completed the material. Material versions can have an

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			effective date so that two versions of a material can be accessed at the same time. An automated workflow updates curricula that contain a reversioned material.
Provider Constraint on Training Custom Reports	Provider Constraint on Training Custom Reports		With this enhancement, a *Restrict to Provider* constraint is added to the *Custom Training Reports - Create* and *Custom Training Reports - View* permissions for custom Training reports. When the constraint is set for the permission, users will only be able to view training data for the constrained providers.
Proxy Enrollment - Recurring Processing Enhancements	Proxy Enrollment - Retain Search Query & Optimization		With this enhancement, if a LO in a recurring proxy enrollment becomes inactive, the inactive LO is not assigned to the selected users. If a LO in a recurring proxy enrollment has a status of Disapproved for a user, the LO is not assigned to the user. In addition, if a LO in a recurring proxy enrollment is

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			reversioned, the newest version of the LO is assigned to users in subsequent assignments.
Proxy Enrollment - Retain Search Query	Proxy Enrollment - Retain Search Query & Optimization		With this enhancement, when an administrator navigates away from and back to the Search Results page when creating a proxy enrollment, the search results are now retained. This includes all search criteria on the page. This is done so that administrators do not need to reenter the search query.
n/a	Self-Registration Usability Enhancements		Self-registration is a crucial way for organizations to bring external users into the system. With these enhancements, we've upgraded the back-end code for a more consistent experience. This includes solving defects related to drag and drop on Admin pages and when previewing self-registration pages through Admin configuration page. There are no release notes for this feature.

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Subordinate on Incomplete Training Standard Reports	Subordinate on Incomplete Training Standard Reports		With this enhancement, an **Include Subordinates** option is added the User Criteria field on the Incomplete Training Report. When this option is selected, the report output includes user data for the users selected in the User Criteria section, as well as the user's subordinates.
Training Title Tag Available for Updated Training Email	Training "Title" Tag Available for Updated Training Email		With this enhancement, a TITLE tag is now available for the Updated Training email trigger. This enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.
Transcript Redesign & Universal Profile Bio/About Auto-upgrade	Transcript Redesign & Universal Profile Bio/About Auto Upgrade		With this enhancement, all organizations using the Learning module are automatically upgraded with the new Transcript redesign. The redesigned Transcript is accessible from the Universal Profile. Upon auto-upgrade, the Universal Profile Bio About page is

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			automatically visible and required for all Transcript users.
Video Administration Enhancements	Video Administration Enhancements		Video learning objects (LOs) are being enhanced for a more consistent administration. This includes adding training hours, custom fields, a Restrict to Provider Constraint on the Video Administration - Manage/View permissions, one-click launch on LO details, and the ability to show/hide video preview on LO details.

Mobile Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
Mobile Launch Curriculum	Mobile Launch Curriculum		With this release, curricula are fully available to view, launch, and complete through the mobile application. The curriculum structure on mobile will follow the same flow and structure as on the desktop version, and every learning object (LO) inside the curriculum that is mobile enabled can be launched from the mobile application.

Performance Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
Competency Administration Enhancements	Competency Administration Enhancements		With this enhancement, competency administration is enhanced to better enable administrators to manage competencies. Administrators can now copy competencies, conveniently edit competency categories, and filter competencies by category type.
Edit Visibility in Partial Edit Mode	Edit Visibility in Partial Edit Mode		With this enhancement, when a performance review task is in Partial Edit mode, administrators can make changes to the visibility of the task. This includes Overall Task Visibility, the Rating and Comments visibility options for all relations, and the Overall Rating option. When visibility changes are made to a task, the visibility changes are immediately reflected in the performance review. This enables administrators to modify visibility settings without needing to contact Global Product Support (GPS).
Email Digest - Include Reviewee as Recipient	Email Digest - View Log & Include Reviewee as Recipient		When creating a Performance Review Step Assigned section for an email digest, administrators can now select Reviewee as a recipient. This enables a recipient to receive a single

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			email digest that includes a notification for tasks in which they are completing a self review and tasks in which they are reviewing another person.
Email Digest - Performance Review Step Due Section	Email Digest - Performance Review Step Due Section		With this enhancement, a new email digest section is available for performance review steps. This section notifies a recipient of all performance review steps that are becoming due within the defined time frame. This enhancement reduces the number of emails a user receives and lowers the chance that an email notification is missed.
Email Digest - View Log	Email Digest - View Log & Include Reviewee as Recipient		When viewing the Email Digest Management page, a View Log option is now available from the Actions drop-down menu. When this option is selected, a .csv file is generated. The email digest log contains details for each time the email digest was sent in the past 30 days
Performance Review Web Service (REST)			With this enhancement, a new Performance Review web service is now available. This web service enables administrators to extract performance review ratings, goals, and competency data that is associated with a performance review task

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			within a specified time period. In order to use this service, administrators need to send a performance review task name or task ID. The web service returns records for all users that are assigned the task. The web service also includes each rating for each review step as well as comments.
Performance Reviews Draft Data Visibility	Performance Reviews Draft Data Visibility		With this enhancement, any ratings and comments that are saved within a performance review prior to submitting the performance review step are not visible to parallel steps or reports. Ratings and comments are not visible until the performance review step is submitted or is completed due to automatic workflows such as the performance review task being past due. This enables reviewers to privately save their comments and ratings and later return to the review step to finalize the assessment.
Performance Reviews Redesign Auto-upgrade - In Progress Tasks	Performance Reviews Redesign Auto-upgrade - In Progress Tasks		With this enhancement, all In Progress and off-cycle performance review tasks are automatically upgraded with the new Performance Review redesign.
Performance Security Updates			With this enhancement, additional security is added

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			to the Performance module.

Platform Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
Email Queuing Optimization	Email Queuing Optimization		In order to improve application performance, Cornerstone has optimized our email queuing system. This improves email processing and has no visible changes within email administration. This will not change any of the functionality, but testing is advised to validate the experience and workflows with Email Management.
Enhanced Video Streaming	Enhanced Video Streaming		With this release, video streaming via Akamai Technologies has been upgraded to ensure more reliable support for all existing video content. This series of enhancements specifically resolves the issue in which videos with a high resolution but low video bit rate (e.g., WebEx recordings) were displayed in low quality when streaming. This type of video content is now displayed in the

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			appropriate resolution. Also, when a video is transcoded by Akamai, the video duration is captured and stored so that it can be displayed on administration pages and the Training Details page.
Enhanced GetUser Web Service	Enhanced GetUser Web Service		With this enhancement, a GUID field is added to the GetUser web service response. The GUID field is the system-defined, unique identifier for each user (employee or candidate) in the application. With the GUID, clients can call the SetUser web service and update a User ID. This can apply in use cases where the user ID is temporary.
Eggshell Display Theme - Extended	Eggshell Display Theme - Extended		With this enhancement, a new *Eggshell - Extended* navigation theme supports WCAG and 508 compliance standards and provides an improved experience on mobile devices. The new navigation theme will have the same appearance of the current Eggshell theme.
Forms Support Reason for			With this enhancement, for portals with Link plus

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Change			Form Management enabled, a **Reason for Change** field can be added to forms. The field enables administrators to track the reason a change is made to the user record as a result of user data captured on forms, such as changing a user's last name.
InCommon SSO	InCommon SSO	Contact Sales, Client Executive, or Client Success Manager to enable via a paid Technical Project across environments.	InCommon provides a secure and privacy-preserving trust fabric for research and higher education organizations and their partners in the United States. This new service allows for a seamless Signle Sign On (SSO) integration with higher-ed clients. Organizations need to exchange the Entity ID in InCommon, and the metadata is imported directly for SSO setup. Certificate management for SSO automatically picks up changes when they are published by InCommon Federation.
Insights: Compliance Control	Compliance Control	Insights will be available to current clients later in Q4 2015. Contact Sales or Client Executive to	**Note:** *The Compliance Control dashboard will be available in later Q4, and help documentation for those dashboards will be*

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		schedule a demo and purchase.	*provided at that time.* Compliance Control help you identify the key sources of non-compliance, why they occurred and what can be done to mitigate the immediate risk. These visual and interactive tools utilize your system's own data to predict the risk associated with employees not finishing a course on time, ultimately preventing future non-compliance and potentially negative impacts on the business. Within the graphs and charts, shift around factors and components to learn what actions will most reduce risk at the course and employee level. Compliance Control Insight is based on Learning and several organizational uses and benefits, including: ○ Shows the current and highest risk levels ○ Identifies specific at-risk employees and likely reasons for non-compliance ○ Increases compliance likelihood ○ Prevents future non-

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			compliance
Insights: Compliance Guide	Compliance Guide	Insights will be available to current clients later in Q4 2015. Contact Sales or Client Executive to schedule a demo and purchase.	The Compliance Guide Insight helps organizations understand the impact of employees not completing training in a timely manner for all learning object types except events and sessions. Predictive factors are automatically compiled based on the data generated for the organizational units. These factors help organizations see the conditions that have and have not contributed to users completing their training on time, such as the date on which the training is due. The purpose of knowing the non-contributing factors is that if there is no significance in a risk factor, then that information may be just as valuable to know. For example, if an organization believed that a certain factor was driving compliance issues, and then discovered through Insight that a different factor was the cause,

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			then that information may be valuable as well.
Insights: Predictive Succession	Predictive Succession	Insights will be available to current clients later in Q4 2015. Contact Sales or Client Executive to schedule a demo and purchase.	**Note:** *The Predictive Succession dashboard will be available in later Q4, and help documentation for those dashboards will be provided at that time.* Take a data-driven approach to succession and employee development with the new Predictive Succession Insight. Use these analytical tools to Identify good internal candidates to efficiently fill open positions. This serves to drive engagement and retention of a company's high performers and promote internal and upward mobility within the organization. Predictive Succession is based on Performance and Learning and has several organizational uses and benefits, including: ○ Predicts employees with high readiness and potential to succeed in a new role in the near or long

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			term ○ Determines factors that drive success predictions ○ Drills down into successors to better understand their skills and readiness
Link: Capture Canceled Reasons	Link: Capture Canceled Reasons		This enhancement has been removed from the October 2015 release.
Link: Manage and Access User Compensation	Link: Manage and Access User Compensation	Automatically enabled if using Link or Compensation. Contact Sales or Client Executive to purchase Link.	With this enhancement, organizations that are using Link are now able to manage and access user compensation data. In addition, a new Employee Salary option is now available on the User Records Administration page. This option opens the Employee Salary Management page for the user.
Link: Reasons for Change in Custom Reports	Link: Reasons for Change in Custom Reports	Automatically enabled if using Link and Reasons for Change. Contact Sales or Client Executive to purchase Link.	With this enhancement, a Reason for Change section is added to the User Record Audits report for portals with Link and Effective Dating enabled. This section allows users to report on reasons that changes were made to a user record. In addition, field names are changed in the User Audits

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			section.
Online Help Redesign	Online Help Redesign		Online Help is getting even more helpful. We're improving your ability to locate content within Online Help via Search and the Table of Contents. Specifically you'll find: 1. Search Widget: More visible, accessible, and effective. 2. Search Results: Optimized so that the most valuable topics are displayed first and in a more visual fashion. 3. Table of Contents: Enhanced to be more intuitive and functional and each folder will be linked to a landing page to reduce clicks. We're also redesigning Online Help to reflect the modern Cornerstone brand that you're used to.
n/a	**Real Time Data Warehouse Beta**		This invite-only program will provide access to the real-time data warehouse for several custom report categories including Recruiting, Learning and

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			Performance. During the Beta, real-time access will be enabled within Production environments and selected participants will be allowed to test the accuracy and performance of data pulled.
Search Users by Address or Email	Search Users by Address or Email		With this enhancement, address fields are added as search criteria on the Users page. In addition, the **Create New Group** option is moved, and using the Tab key to navigate between search fields is enhanced.
Update to System Footer			Cornerstone recently unveiled a new corporate logo, focused on our mission of helping organizations and individuals realize their potential. With the November 13, 2015 patch release, the footer that appears at the bottom of all system pages is updated to include the new Cornerstone branding. The size of the footer and the functionality within the footer is unchanged. If a custom or modified footer is currently in use, then this update does not

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			impact the existing custom footer. Custom footers are only available on a case-by-case basis, and requests must be submitted to Sales/Client Sales Executive.

Recruiting Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
Candidate Communication & Tracking	Candidate Communication & Tracking		With this enhancement, recruiters can now send customizable emails directly to applicants from the Applicant Profile and Manage Applicants pages. A new Email tab is added to the Applicant Profile page to enable recruiters to send and track emails to applicants, and an option to send a customizable email is added to the Manage Applicants page. The History tab is automatically updated when emails are sent/received.
Candidate Search Query Usability Enhancements	Candidate Search Query Usability Enhancements		With this enhancement, the Candidate Search Query functionality is updated to enable recruiters to search by

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	BY REQUEST?	DESCRIPTION
			individual resume/CV fields, as well as attachments to the application. In addition, a predictive search feature is added to the search field to help recruiters find specific resume fields more quickly. When terms are entered in the search field, a drop-down appears, showing a list potential resume field matches that can be selected to include in the search.
Enhanced Job Applicant Web Service	Enhanced Job Applicant Web Service		With this enhancement, the Job Applicant web service is enhanced to enable organizations to search for candidates by custom statuses. The CurrentStatus parameter now accepts a custom status as long as the status is defined in the system.
Historical Applicant Status Custom Report	Historical Applicant Status Custom Report		With this enhancement, a Historical Status section is added to custom Recruiting reports. This section includes fields that provide historical applicant status data, which helps recruiters understand how long an applicant was in each status and help identify workflow improvements.

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Launch Onboarding Usability Enhancements	Launch Onboarding Usability Enhancements		With this enhancement, usability enhancements are made to the Launch Onboarding page.
Pre-Screening Scores in Custom Reports	Pre-Screening Scores in Custom Reports		As part of a separate enhancement for the October '15 release, scoring can be configured for pre-screening questions. With this enhancement, new fields are added to the Pre-Screening Questions section on custom Recruiting reports to enable reporting on pre-screening question scoring.
Pre-Screening Talent Score	Pre-Screening Talent Score		With this enhancement, pre-screening questions can now be scored in order to more accurately screen out applicants during the applicant search process. Administrators can define a minimum score that applicants must meet in order to continue in the application process. Recruiters will then be able to view and sort all applicants within a job requisition. In addition, the user interface (UI) for the Pre-Screening Question Bank has been updated to match current

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			styles.
Recruiting Usability Enhancements	Recruiting Usability Enhancements		With this enhancement, the following usability improvements are made throughout the Applicant Tracking System: ○ Manage Applicants Status Filter behavior updated ○ Submission Date column added to Manage Applicants page ○ Status Change Date column added to Manage Applicants page ○ Disposition Reason visibility added to various areas ○ Resume/CV Review Page - download PDF of application ○ PDF of application to display manually entered resume data ○ Improve formatting when pasting from word to **Description** and **Qualifications** fields
Remove LinkedIn from Search My Network	Remove LinkedIn from Search My Network		With this enhancement, internal users will no longer be able to search their LinkedIn network for potential matches and

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			refer them for open job requisitions. Referral Preferences and the Refer Jobs page in Career Center are updated to remove the option. In addition, the LinkedIn applicant details on the Resume/CV Review page are updated, and the applicant's photo no longer displays.
Selection in Custom Reports	Selection in Custom Reports	Automatically enabled if using Selection. Contact Sales or Client Executive to purchase Selection.	Organizations with integrated Selection need to get a prioritized mix of candidates for their positions. This typically this translates to roughly 40% Green, 30% Yellow, and 30% Red candidates (GYR) based on the Selection assessment score for a given position. When the percentage of one of the bands is "too high" or "too low," filling new openings with the best candidates can be difficult, and the benefits of prioritization are lost. In addition, organizations would like the ability to combine Selection data with internal datasets. This enhancement provides the key reporting necessary to understand whether GYR applicant distributions are

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			on target or need adjustment, as well as schedule regular data exports to support independent analyses. For portals with the Selection functionality enabled, this enhancement adds Selection section to custom Recruiting reports to enable reporting on Selection data. The scores and assessment fields that are available for the report are pulled from the **Detailed Results** page.

Succession Features

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Job Pool Succession Custom Report	Job Pool Succession Custom Report		The Job Pool Succession Custom Report is a new custom report that allows users to report on job pool task data.
SMP Task - View Permission			With this enhancement, a new SMP Task - View permission is now available. This permission grants the ability to view succession tasks. This permission is dynamically assigned to a user when they are assigned any type of SMP task. When the SMP task has ended, this permission is dynamically removed.

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			This permission cannot be constrained.
Talent Conferences	Talent Conferences		With this enhancement, a new Talent Conference succession task is now available. This type of succession task allows organizations to schedule and manage talent review conferences, engaging multiple stakeholders within the organization to provide input in employee calibration decisions. Task moderators are able to record any succession rating calibration decisions, generate a summary report, and distribute the results to stakeholders.

New and Enhanced Permissions for October '15 Release

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

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
Connect	Custom Connect Report - Create	Grants ability to create and edit custom Connect reports.	Reports - Analytics
Connect	Custom Connect Report - View	Grants ability to view results of custom Connect reports created by self or shared by others.	Reports - Analytics
Connect	Edit Availability Knowledge Bank/Communities	Grants ability to configure the availability when editing communities or when creating or editing topics. This permission does not grant the ability to edit a community; users can only edit a community or topic if they have the Manage Knowledge Bank/Communities Administration or if they are a moderator for the community or topic. When creating a topic, the constraints on this permission are automatically applied to the topic's availability. If the user also has the Manage Knowledge Bank/Communities Administration permission, then the constraints on that permission are	New Connect

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		automatically applied to the topic's availability.	
Learning	Material Version - Manage	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.	Learning - Administration
Performance	Observation Checklist User - Manage Pending Checklists	Grants ability to access the Pending Checklists page and manage pending checklist approvals. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Performance	Observation Checklist User - View Checklist	Grants ability to access the My Checklists page and the Checklist Details page. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Recruiting	Applicants: Send Customizable Email	Grants access to create and send adhoc emails to applicants (both individual and batch emails to group of applicants).	Recruiting Administration
Recruiting	Applicants: View Email Tab	Grants access to view the Email tab within the Applicant Profile page and all of its content. This permission cannot be constrained.	Recruiting Administration
Recruiting	Custom Recruiting	Grants ability to create	Reports -

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
	Report - Access Historical Status Section	and edit Custom Recruiting reports. This permission can be constrained by Division, Position, and Location.	Analytics
Recruiting	Selection Custom Reports	Grants the user Custom Reports access to applicant scores from the Cornerstone Selection module for custom Recruiting reports. This permission cannot be constrained.	Recruiting
Succession	SMP Task - View	Grants the ability to view succession tasks. This permission is dynamically assigned to a user when they are assigned any type of SMP task. When the SMP task has ended, this permission is dynamically removed. This permission cannot be constrained.	Talent/Succession

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

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
Learning	Curricula Version - Manage	The constraints on the Curricula Version - Manage permission determine for which users the administrator can assign a new version of a curriculum when reversioning a material that is contained within a curriculum.	Learning - Administration
Learning	Materials - Add Type	This permission can no longer be constrained.	Learning - Administration

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
Learning	Materials Management	This permission is enhanced to grant the ability to view the Material Administration page, create materials, and edit materials. This permission can now be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view and edit.	Learning - Administration
Learning	Video Administration - Manage	This permission can now be constrained by Provider.	Learning - Administration
Learning	Video Administration - View	This permission can now be constrained by Provider.	Learning - Administration
Learning	Employee Transcripts - Manager/Approver Access	*Restrict to User's Direct Subordinates* constraint is added to the permission.	Reports - Track Employee
Learning	ILT Session Withdrawal Report - Manager Version	*Restrict to User's Direct Subordinates* constraint is added to the permission.	Reports - Track Employee
Learning	Track Employees - Employee Records	*Restrict to User's Direct Subordinates* constraint is added to the permission.	Reports - Track Employee
Learning	Track Employees - Training Progress Pie Chart	*Restrict to User's Direct Subordinates* constraint is added to the permission.	Reports - Track Employee
Learning	Track Employees - Training Status Summary Report	*Restrict to User's Direct Subordinates* constraint is added to the permission.	Reports - Track Employee
Performance	Observation Checklist - Manage	The permission is renamed and is now titled Observation Checklist Admin - Manage.	Performance - Administration

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
Performance	Observation Checklist - View	The permission is renamed and is now titled Observation Checklist Admin - View.	Performance - Administration
Succession	Custom Succession Report - Create	The following constraints are added to this permission and apply to the job pool task creator: ○ Restrict to OU ○ Restrict to User's OU ○ Restrict to User Self and Subordinates ○ Restrict to User's Subordinates	Reports - Analytics
Succession	Custom Succession Report - View	The following constraints are added to this permission and apply to the job pool task creator: ○ Restrict to OU ○ Restrict to User's OU ○ Restrict to User Self and Subordinates ○ Restrict to User's Subordinates	Reports - Analytics

Release Notes Updates

Changes have been made on 20 November 2015, to the release notes for the October '15 release:

Platform

ENHANCEMENT NAME	PURPOSE OF CHANGE
Forms Support Reason for Change	To add release notes for the Forms Support Reason for Change enhancement.

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

Connect

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Connect Communities Custom Report	Connect Communities Custom Report	To correct the permissions needed for running Connect Communities custom reports.	Added the following permissions: ○ Custom Connect Communities Report - Create ○ Custom Connect Communities Report - View

Changes have been made on 23 October 2015, to the following areas of the release notes for the October '15 release:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Browse for Training - Courses for You	Browse for Training Page	To specify the navigation link behavior when the Browse for Training landing	Added a clarification that if the Browse for Training landing page is enabled, the Browse for Training navigation link

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
		page is enabled.	automatically directs users to the Browse for Training landing page. The regular Browse for Training page can be added as an additional navigation link, if needed. Also updated the navigation text to specify the navigation behavior when the landing page is enabled and disabled.
Browse for Training - Courses for You	Browse for Training Preferences	To clarify the navigation link behavior when the Browse for Training landing page is enabled and to update a screenshot.	Added a clarification that if the Browse for Training landing page is enabled, the Browse for Training navigation link automatically directs users to the Browse for Training landing page. The regular Browse for Training page can be added as an additional navigation link, if needed. Updated the screen shot for the Configure Browse for Training Landing Page section. The description for the Newest section is updated to match the section's behavior.
Browse for Training - Courses for You	Navigation Tabs and Links	To clarify the navigation link behavior when the Browse for Training landing page is enabled.	Added a clarification that if the Browse for Training landing page is enabled, the Browse for Training navigation link automatically directs users to the Browse for Training landing page.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
			The regular Browse for Training page can be added as an additional navigation link, if needed.
Central Material Administration	Material Administration	To provide the updated permission behaviors.	Added the updated permission descriptions in the Permissions section. Previously, the updated permission descriptions were only available on the Overview topic.
Central Material Administration	Material Type Administration	To provide the updated permission behaviors.	Added the updated permission descriptions in the Permissions section. Previously, the updated permission descriptions were only available on the Overview topic.
Central Material Administration	Material - Create/Edit - General	To provide the updated permission behaviors.	Added the updated permission description in the Permissions section. Previously, the updated permission description was only available on the Overview topic.
Central Material Administration	Material - Create/Edit - Availability	To provide the updated permission behaviors.	Added the updated permission description in the Permissions section. Previously, the updated permission description was only available on the Overview topic.
Central Material Administration	Material - Create/Edit - Emails	To provide the updated permission behaviors.	Added the updated permission description in the Permissions section. Previously, the updated permission description was only available on the Overview topic.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Curriculum Completion Percentage in Custom Reports	Curriculum Completion Percentage in Custom Reports	To clarify the completion percentage functionality for existing curricula.	Added an Implementation section that clarifies that users will need to re-access existing curricula in the Curricula Player in order for completion percentage to be calculated for that curriculum.
Materials Versioning	Additional Tags for Updated Training Email Trigger	To clarify the behavior if the training does not have a Start Date or End Date.	Added a clarification that the Start Date and End Date tags are not included in the email if they are not defined for the training. This includes if the training is not a material.
Transcript Redesign & Universal Profile Bio/About Auto-upgrade	Transcript Redesign & Universal Profile Bio/About Auto-upgrade	To clarify the behavior of the "Bio About - View" permission upon release.	Add a *Bio About - View Permission* section to the topic to explain the implementation of the "Bio About - View" permission upon release.

Mobile

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Mobile Release Dates	Mobile Release Dates	To clearly identify when the Cornerstone Mobile® application is updated with each release.	This is a new topic.

Platform

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Update to	Update to	To describe the new footer that	This is a

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
System Footer	System Footer	appears at the bottom of all system pages. This new footer will be implemented with the November 13, 2015 patch release.	new topic.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Candidate Communication & Tracking	Candidate Communication & Tracking Overview	To update the email notification information.	Changed the overview text to indicate that notifications can be received via any email client, rather than only Outlook.

Succession

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Job Pool Succession Custom Report	Job Pool Succession Custom Report	To update the description of the permissions needed to run Job Pool Succession custom reports.	Updated the description for the Custom Succession Report - Create and Custom Succession Report - View permissions.

Changes have been made on 16 October 2015, to the following areas of the release notes for the October '15 release:

Compensation

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Link: Manage and Access User		To move the Link enhancement to the	Move the Link enhancement to the

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Compensation		Platform section of the release notes.	Platform section of the release notes.
User Records Administration - Employee Salary		To add a new topic that is specific to organizations using Compensation.	This is a new topic.

Connect

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Connect Communities Custom Report	Connect Communities Custom Report	To add permissions for running custom Communities Custom Reports.	Added the following permissions: ○ Custom Connect Report - Create ○ Custom Connect Report - View

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Browse for Training - Courses for You	Browse for Training - Courses for You	To indicate that the Browse for Training landing page is disabled by default in Stage, Live, and Pilot portals.	Updated the implementation to state that this functionality is available and disabled by default in Stage, Live, and Pilot portals.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Browse for Training - Courses for You	Browse for Training Landing Page	To clarify that the navigation tabs and links are only impacted if the Browse for Training landing page is enabled, to clarify the behavior if no image is set for a learning object (LO), and to update the behavior of the Newest filter.	Added a clarification that the navigation link is only impacted when the Browse for Training landing page is enabled. Added that if a training does not have a set image, then a randomly selected default image is displayed. Removed the indication that the Newest filter also includes updated training. The Newest filter only includes the most recently created training.
Browse for Training - Courses for You	Browse for Training Page	To indicate that Tile View is only available if enabled via Browse for Training Preferences.	Added a clarification that the Tile View option is only available on the Browse for Training page if it is enabled via Browse for Training Preferences.
Browse for Training - Courses for You	Browse for Training Preferences	To include the ability to disable the Browse for Training landing page and tile view and to update the behavior of the Newest filter.	Add a description of the **Enable Browse for Training Landing Page and Tile View** option. Removed the indication that the Newest filter also includes updated

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
			training. The Newest filter only includes the most recently created training.
Browse for Training - Courses for You	Course Catalog - Thumbnail Image	To clarify the behavior if no image is set for a LO.	Added that if a training does not have a set image, then a randomly selected default image is displayed.
Browse for Training - Courses for You	Default Thumbnail Images	To provide the default images that are used for LOs on the Browse for Training landing page and the Browse for Training page.	This is a new topic.
Browse for Training - Courses for You	Navigation Tabs and Links	To provide the name of the Browse for Training landing page and the Browse for Training page within Navigation Tabs and Links.	This is a new topic.
Video Administration Enhancements	Enable/Disable Video LO Preview	To clarify that the video preview is disabled by default for existing video LOs.	Changed the implementation information to state that the video LO preview is disabled by default for all existing video LOs.

Mobile

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Mobile Launch	Mobile	Clarify the	Added the following information

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Curriculum	Launch Curriculum Overview	availability of this functionality during UAT.	to the Implementation section: "This functionality is not available to be tested during UAT. This functionality is not available until the latest version of the mobile application is released and then downloaded on October 30."

Platform

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC
Link: Capture Canceled Reasons	Link: Capture Canceled Reasons	Indicate that this functionality is removed from the release.	Added a message to indicate that this functionality is removed from the release.
Link: Manage and Access User Compensation		Move enhancement from the Compensation section of the release notes.	Moved enhancement from the Compensation section of the release notes.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC	IMPLEMENTATION
Candidate Search Query Usability Enhancements	Saved Searches	Add information about deleting shared searches and searching for users with whom to share a saved search.	Added information about deleting shared searches and searching for users with whom to share a saved	

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE	CHANGE MADE TO TOPIC	IMPLEMENTATION
			search.	
Recruiting Usability Enhancements	Manage Applicants - Status Filter	To update the name and functionality of the **Exclude/Include Hired** and Closed link on the Manage Applicants page.	The name and functionality of the **Exclude Hired**/Closed link on the Manage Applicants page is changed. The link is renamed **Include Hired/Closed**. When accessing the Manage Applicants page, applicants who are in a Hired or Closed status do not display in the applicants table. Clicking the **Include Hired/Closed** link will update the applicants table to show applicants who are in a Hired or Closed status.	This change is effective 30 October 2015. Stage portals will not be updated with this change during User Acceptance Testing (UAT).

November 13 Patch Release Functionality

What's New for November 13 Patch Release

The following is released along with the November 13 patch release:

FEATURE	DESCRIPTION
Material Versioning	With the November 13, 2015 patch release, if an organization decides to opt out of material versioning, then the following changes are made to the system behavior: ○ Administrators with the Materials Management permission can edit the Material Source via the Course Catalog and when editing a material. Previously, this could only be done when creating a new version of a material. ○ Administrators with the Materials Management permission can change the active status of a material via the **Active** checkbox on the Material Administration page. Previously, a material's Active status could only be changed via the Course Catalog. ○ The **Start Date** and **End Date** fields in the *Version Details* section do not appear when creating or editing a material. Previously, these fields were always visible when creating or editing a material.
Update to System Footer	Cornerstone recently unveiled a new corporate logo, focused on our mission of helping organizations and individuals realize their potential. With the November 13, 2015 patch release, the footer that appears at the bottom of all system pages is updated to include the new Cornerstone branding. The size of the footer and the functionality within the footer is unchanged. If a custom or modified footer is currently in use, then this update does not impact the existing custom footer. Custom footers are only available on a case-by-case basis, and requests must be submitted to Sales/Client Sales Executive.

Material Versioning Patch Enhancements

With the October '15 release, materials were enhanced to support versioning. This enhancement enabled administrators to manage incremental versions of materials and assign a reversioned material to users who have the material on their transcript, including users who have completed the material. With this enhancement, material versions can have an effective date so that two versions of a material can be accessed at the same time.

With the November 13, 2015 patch release, if an organization decides to opt out of material versioning, then the following changes are made to the system behavior:

- Administrators with the Materials Management permission can edit the Material Source via the Course Catalog and when editing a material. Previously, this could only be done when creating a new version of a material.
- Administrators with the Materials Management permission can change the active status of a material via the **Active** checkbox on the Material Administration page. Previously, a material's Active status could only be changed via the Course Catalog.
- The **Start Date** and **End Date** fields in the *Version Details* section do not appear when creating or editing a material. Previously, these fields were always visible when creating or editing a material.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an	Learning - Administration

	administrator permission.	

Update to System Footer

Cornerstone recently unveiled a new corporate logo, focused on our mission of helping organizations and individuals realize their potential. With the November 13, 2015 patch release, the footer that appears at the bottom of all system pages is updated to include the new Cornerstone branding. The size of the footer and the functionality within the footer is unchanged.

If a custom or modified footer is currently in use, then this update does not impact the existing custom footer. Custom footers are only available on a case-by-case basis, and requests must be submitted to Sales/Client Sales Executive.

As previously implemented, all organizations are always using the latest version of the Cornerstone system. However, the version number can be viewed by clicking and dragging the computer cursor directly above the copyright dates.

Previous Footer

Updated Footer

Implementation

With the November 13, 2015 patch release, the footer that appears at the bottom of system pages include the new Cornerstone branding.

Compensation

Configurable Visibility of Component Budgets

Configurable Visibility of Component Budgets

Prior to this enhancement, all budgets appeared in the Budget Summary, Compensation Dashboard, Roll-up Summary, Plan Summary, Pending Approvals, Summary tab, and Approve Compensation Plans tab. There was no option to hide any unneeded budgets.

With this enhancement, administrators are able to hide any unneeded budgets from the Budget Summary, Compensation Dashboard, Roll-up Summary, Plan Summary, Pending Approvals, Summary tab, and Approve Compensation Plans tab.

Use Cases

An administrator creates a component that does not have a budget. The administrator hides the component's budget so that it does not distract the compensation manager.

An administrator creates a component that is not included in base compensation and is solely used as a multiplier for another component. When creating the multiplier component, the administrator hides the budget so that it does not look like a budgeted component. Instead, this component is visible as a component multiplier.

Considerations

Administrators can only hide a component budget if the budget is set to "None."

Implementation

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

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Plan Templates	Grants ability to create and manage compensation plan templates for base, bonus, and equity compensation. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration
Compensation Task Administration -	Grants access to the Compensation Task Administration page, and grants ability to view and manage compensation planning	Compensation - Administration

Manage	and modeling tasks from the Compensation Task Administration page. Administrators can only view a compensation task if they have this permission and are also included in the Visibility settings for the compensation task. **Note:** *Administrators with the Compensation Task Administration permission can view and manage all compensation tasks and do not require this permission.* This permission cannot be constrained. This is an administrator permission.	
Compensation Task Administration	Grants ability to configure and assign compensation planning and modeling tasks to managers in the organization. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration

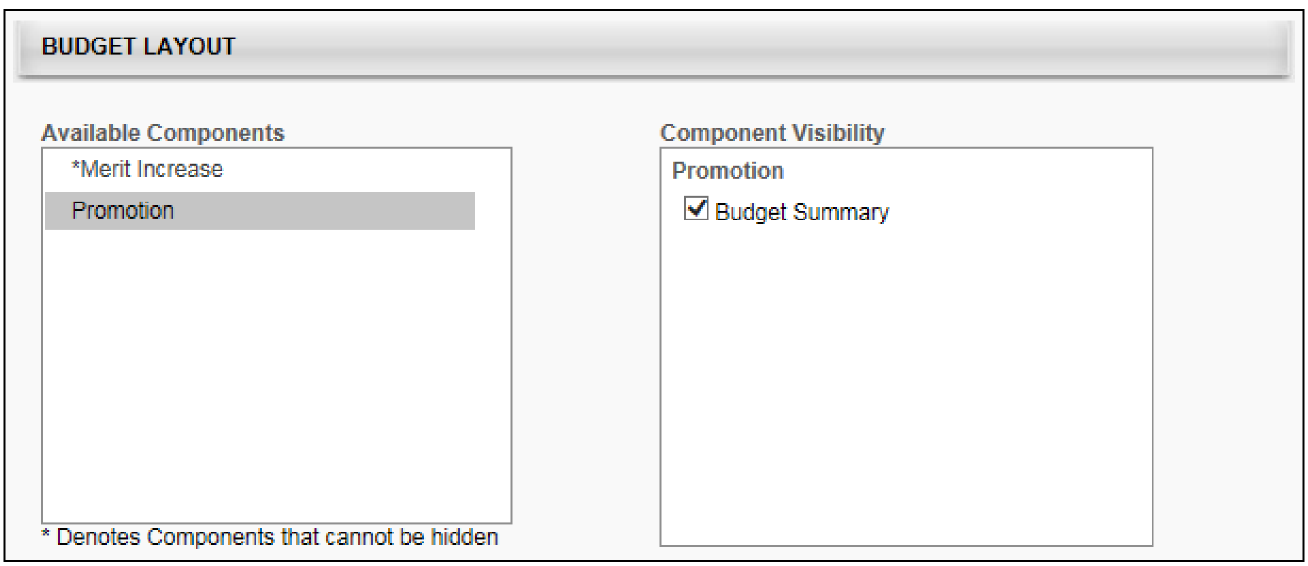
Compensation Template - Layout - Budget Layout

With this enhancement, a new Budget Layout section is available on the Layout tab when creating or editing a compensation template. This section enables administrators to configure the visibility of components within the Budget Summary graph for the template.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Plan Templates	Grants ability to create and manage compensation plan templates for base, bonus, and equity compensation. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration



Budget Layout

The *Budget Layout* section enables administrators to configure the visibility of components within the template.

The **Available Components** field lists all of the components that are added to the compensation template on the General tab. Components are displayed in the **Available Components** field in alphabetical order. An asterisk appears to the left of each component that cannot be hidden from the template because the component has a defined budget.

The **Component Visibility** field displays the areas in which the component may be able to be hidden. The visibility options are only editable if the budget for the component is set to "None" on the General tab. If the component's budget is configured by OU on the General tab, then the visibility options are only editable if the budget is set to "None" for all OUs, including the default budget. Further, if a component budget is changed from "None" to a different budget type, then the visibility options are automatically selected for the component, regardless of the previous setting of the options. The following areas are available:

- **Budget Summary** - This option determines whether the component is visible in the Budget Summary graph on the template tab of the compensation plan. By default, this option is selected for all components.

When editing a compensation template, modifying the visibility options does not create a new version of the template.

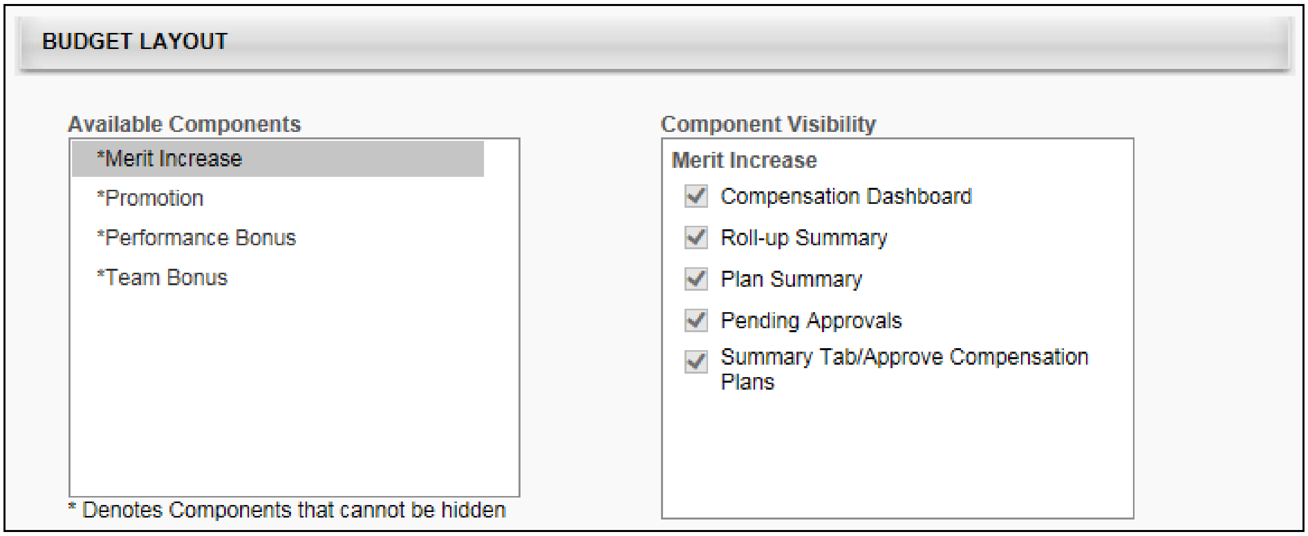
Create Standard Task - Layout

With this enhancement, a new Budget Layout section is available on the Layout tab when creating or editing a standard, planning compensation task. This section enables administrators to configure the visibility of components within the Compensation Dashboard, Roll-up Summary tab, Plan Summary tab, Pending Approvals tab, Summary tab and Approve Compensation Plans tab for the standard task.

To create a compensation task, go to **Admin > Tools > Compensation Management > Tasks**. Then, click the **Create Compensation Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Task Administration - Manage	Grants access to the Compensation Task Administration page, and grants ability to view and manage compensation planning and modeling tasks from the Compensation Task Administration page. Administrators can only view a compensation task if they have this permission and are also included in the Visibility settings for the compensation task. **Note:** *Administrators with the Compensation Task Administration permission can view and manage all compensation tasks and do not require this permission.* This permission cannot be constrained. This is an administrator permission.	Compensation - Administration
Compensation Task Administration	Grants ability to configure and assign compensation planning and modeling tasks to managers in the organization. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration



Budget Layout

The *Budget Layout* section enables administrators to configure the visibility of components within the compensation task. This section is not available for compensation modeling tasks.

The **Available Components** field lists all of the components that are added to the compensation task's templates. Components are displayed in the **Available Components** field in alphabetical order. An asterisk appears to the left of each component that cannot be hidden from the task because the component has a defined budget.

The **Component Visibility** field displays the areas in which the component may be able to be hidden. The visibility options are only editable if the budget for the component is set to "None." If the component's budget is configured by OU, then the visibility options are only editable if the budget is set to "None" for all OUs, including the default budget. Further, if a component budget is changed from "None" to a different budget type, then the visibility options are automatically selected for the component, regardless of the previous setting of the options. The following areas are available:

- **Compensation Dashboard** - This option determines whether the component is visible in the User Profile Dashboard within the compensation task. By default, this option is selected for all components.
- **Roll-up Summary** - This option determines whether the component is displayed as a column in the Roll-up Summary tab of the compensation task. By default, this option is selected for all components. **Note:** *This option is not available if "Administrator" is selected in the* **Compensation Manager** *field on the General tab.*
- **Plan Summary** - This option determines whether the component is displayed as a column in the Plan Summary tab of the compensation task.

By default, this option is selected for all components. **Note:** *This option is not available if "Administrator" is selected in the* **Compensation Manager** *field on the General tab.*

- **Pending Approvals** - This option determines whether the component is displayed as a column in the Pending Approvals tab of the compensation task. By default, this option is selected for all components. **Note:** *This option is not available if "Administrator" is selected in the* **Compensation Manager** *field on the General tab.*
- **Summary Tab/Approved Compensation Plans** - This option determines whether the component is visible in the Budget Summary graph on the Summary/Approve tab of the compensation plan. This does not hide the component as a column on the Summary Tab/Approved Compensation Plans page. By default, this option is selected for all components.

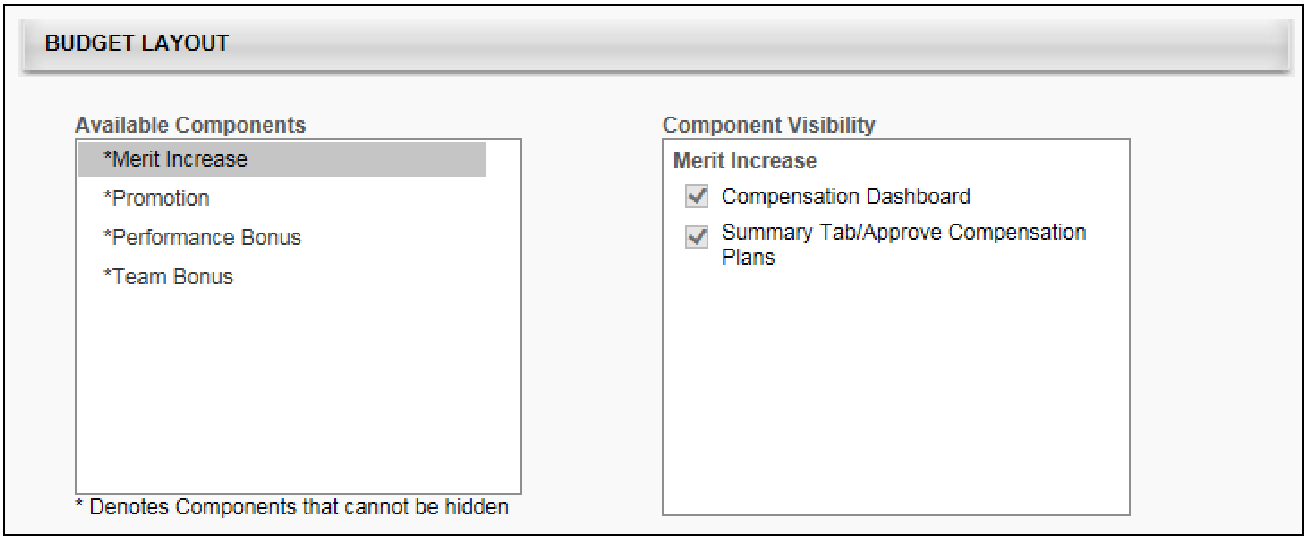
Create Off Cycle Task - Layout

With this enhancement, a new Budget Layout section is available on the Layout tab when creating or editing an off-cycle, planning compensation task. This section enables administrators to configure the visibility of components within the Compensation Dashboard, Summary tab, and Approve Compensation Plans tab for the off-cycle task.

To create a compensation task, go to **Admin > Tools > Compensation Management > Tasks**. Then, click the **Create Compensation Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Task Administration - Manage	Grants access to the Compensation Task Administration page, and grants ability to view and manage compensation planning and modeling tasks from the Compensation Task Administration page. Administrators can only view a compensation task if they have this permission and are also included in the Visibility settings for the compensation task. **Note:** *Administrators with the Compensation Task Administration permission can view and manage all compensation tasks and do not require this permission.* This permission cannot be constrained. This is an administrator permission.	Compensation - Administration
Compensation Task Administration	Grants ability to configure and assign compensation planning and modeling tasks to managers in the organization. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration



Budget Layout

The *Budget Layout* section enables administrators to configure the visibility of components within the compensation task.

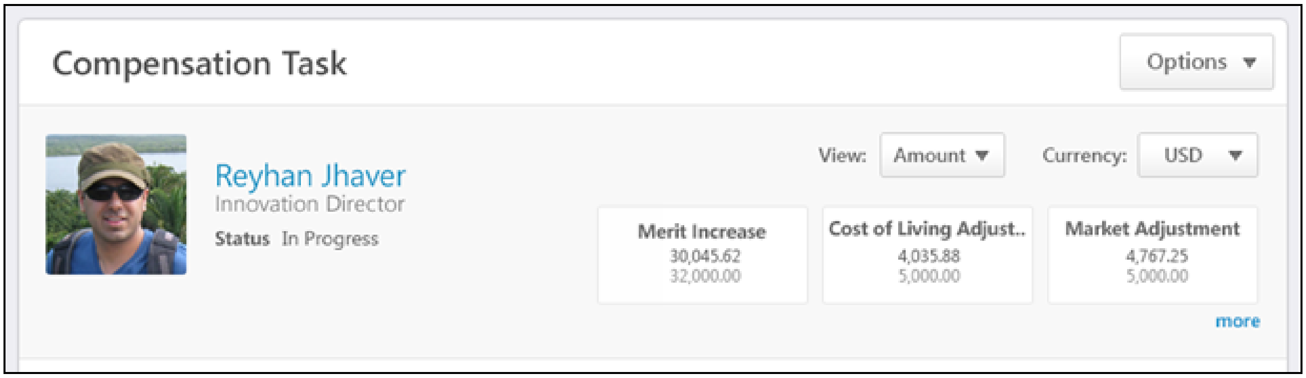
The **Available Components** field lists all of the components that are added to the compensation task's templates. Components are displayed in the **Available Components** field in alphabetical order. An asterisk appears to the left of each component that cannot be hidden from the task because the component has a defined budget.

The **Component Visibility** field displays the areas in which the component may be able to be hidden. The visibility options are only editable if the budget for the component is set to "None." If the component's budget is configured by OU, then the visibility options are only editable if the budget is set to "None" for all OUs, including the default budget. Further, if a component budget is changed from "None" to a different budget type, then the visibility options are automatically selected for the component, regardless of the previous setting of the options. The following areas are available:

- **Compensation Dashboard** - This option determines whether the component is visible in the User Profile Dashboard within the compensation task. By default, this option is selected for all components.
- **Summary Tab/Approved Compensation Plans** - This option determines whether the component is visible in the Budget Summary graph on the Summary/Approve tab of the compensation plan. This does not hide the component as a column on the Summary Tab/Approved Compensation Plans page. By default, this option is selected for all components.

Compensation Task - User Profile Dashboard

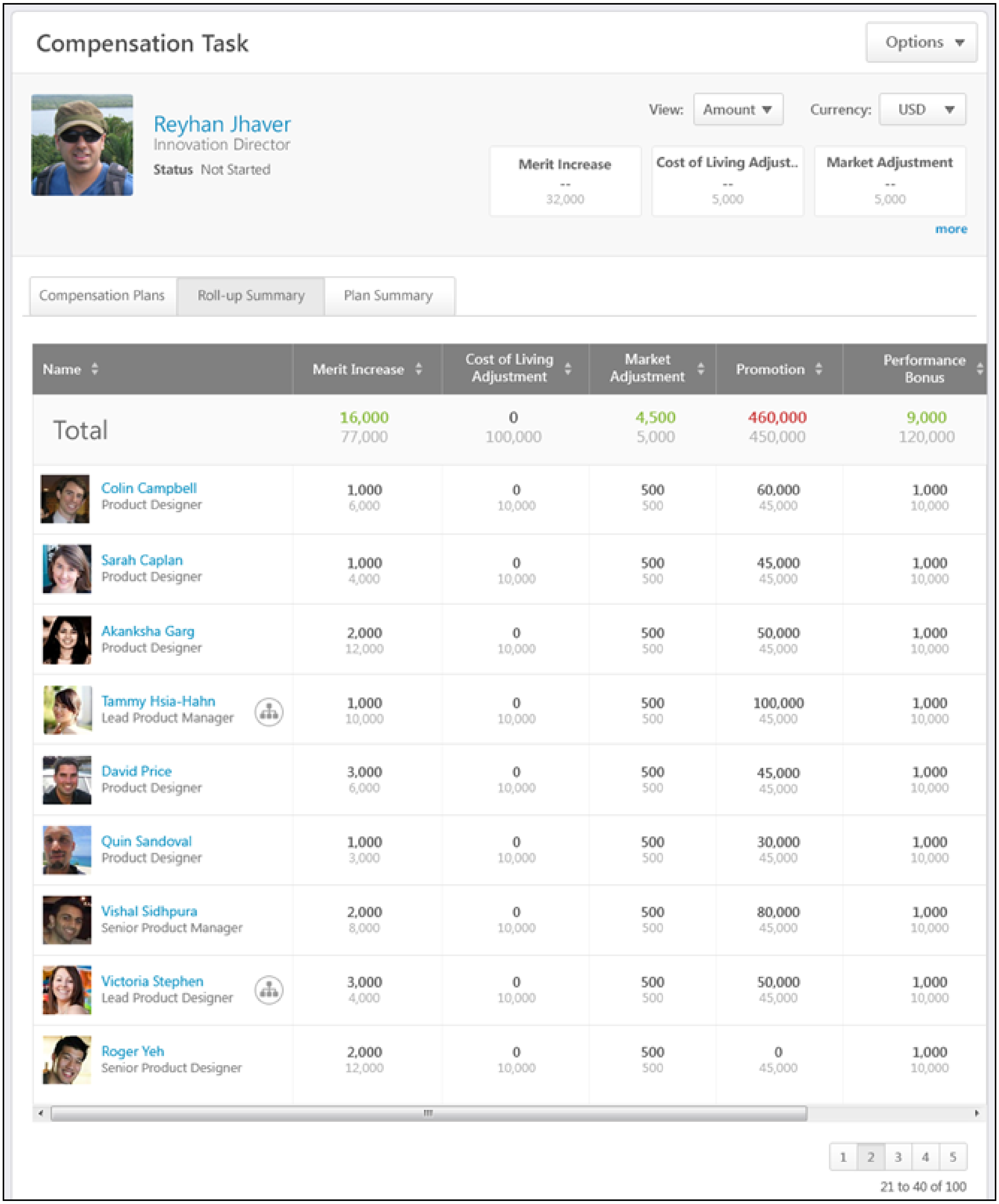
When a compensation manager is viewing a compensation task, the User Profile Dashboard only displays components that are configured to be visible in the compensation task.



Compensation Task - Roll-up Summary Tab

When a compensation manager is viewing a compensation task, the Roll-up Summary tab only displays a column for components that are configured to be visible in the compensation task. If all components are hidden, then only the Name column is displayed and the Total row is blank.

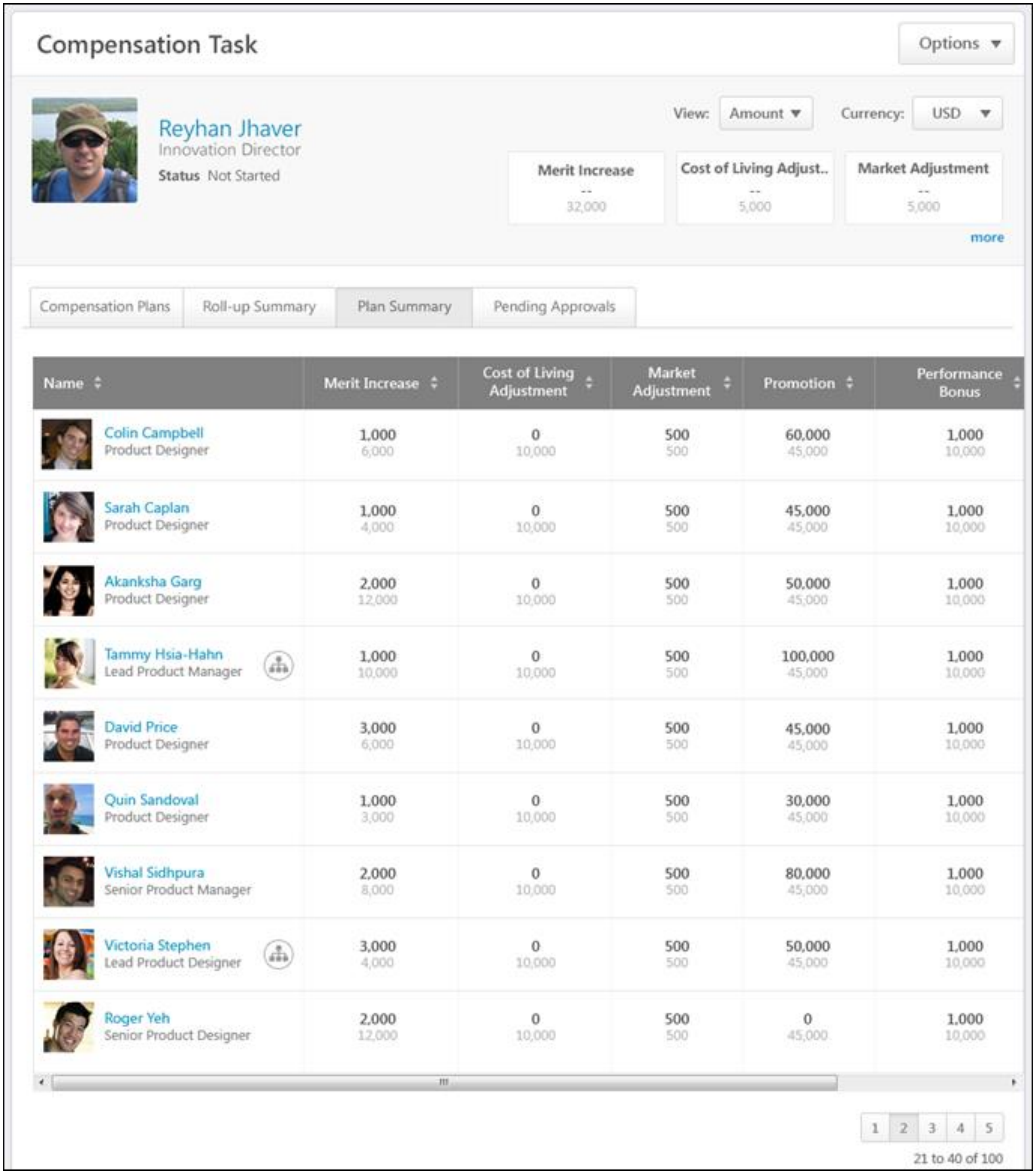
To access the Roll-up Summary tab of a compensation task, go to **Home > Scheduled Tasks**. Click the compensation task title.


Compensation Task
Options
Reyhan Jhaver
Innovation Director
Status Not Started
View: Amount
Currency: USD
Merit Increase
--
32,000
Cost of Living Adjust..
--
5,000
Market Adjustment
--
5,000
more
Compensation Plans
Roll-up Summary
Plan Summary
Name
Merit Increase
Cost of Living Adjustment
Market Adjustment
Promotion
Performance Bonus
Total
16,000
77,000
0
100,000
4,500
5,000
460,000
450,000
9,000
120,000
Colin Campbell
Product Designer
1,000
6,000
0
10,000
500
500
60,000
45,000
1,000
10,000
Sarah Caplan
Product Designer
1,000
4,000
0
10,000
500
500
45,000
45,000
1,000
10,000
Akanksha Garg
Product Designer
2,000
12,000
0
10,000
500
500
50,000
45,000
1,000
10,000
Tammy Hsia-Hahn
Lead Product Manager
1,000
10,000
0
10,000
500
500
100,000
45,000
1,000
10,000
David Price
Product Designer
3,000
6,000
0
10,000
500
500
45,000
45,000
1,000
10,000
Quin Sandoval
Product Designer
1,000
3,000
0
10,000
500
500
30,000
45,000
1,000
10,000
Vishal Sidhpura
Senior Product Manager
2,000
8,000
0
10,000
500
500
80,000
45,000
1,000
10,000
Victoria Stephen
Lead Product Designer
3,000
4,000
0
10,000
500
500
50,000
45,000
1,000
10,000
Roger Yeh
Senior Product Designer
2,000
12,000
0
10,000
500
500
0
45,000
1,000
10,000
1 2 3 4 5
21 to 40 of 100

Compensation Task - Plan Summary Tab

When a compensation manager is viewing a compensation task, the Plan Summary tab only displays a column for components that are configured to be visible in the compensation task. If all components are hidden, then only the Name and Status columns are displayed.

To access the Plan Summary tab of a compensation task, go to **Home > Scheduled Tasks**. Click the compensation task title. Then, click the Plan Summary tab.

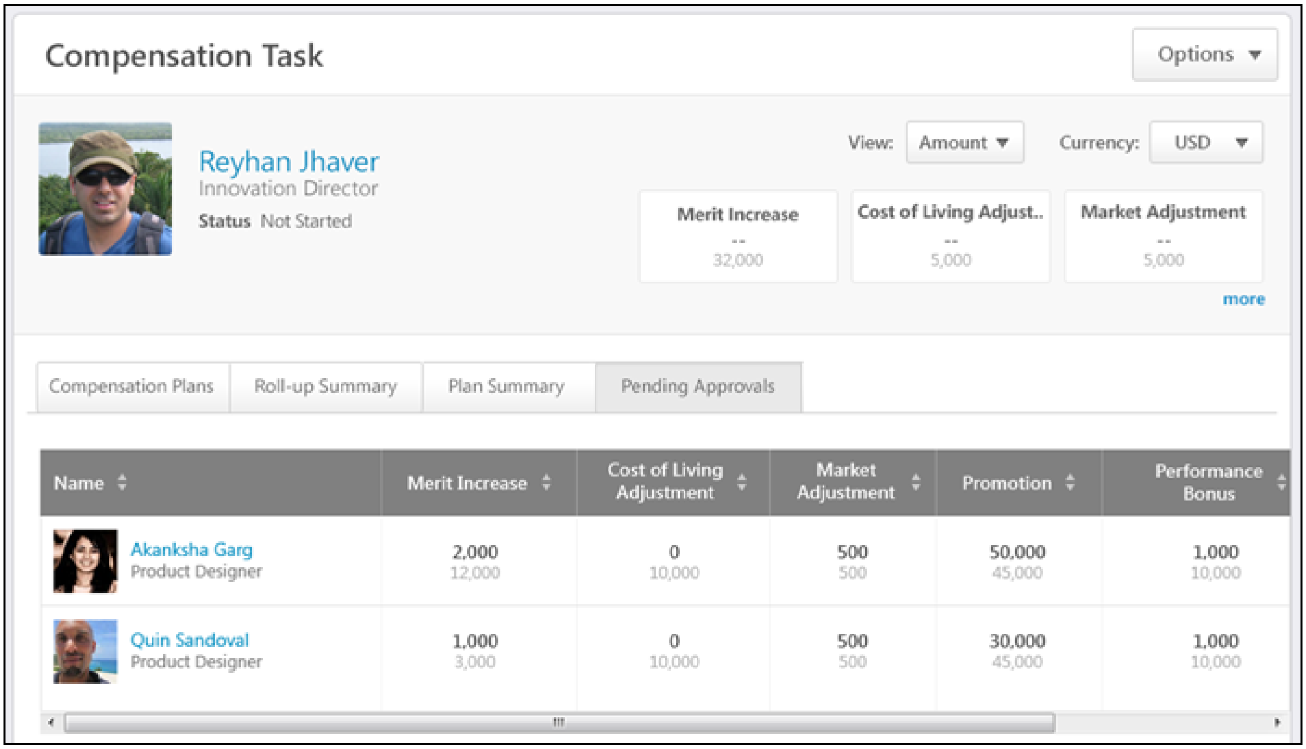


Name	Merit Increase	Cost of Living Adjustment	Market Adjustment	Promotion	Performance Bonus
Colin Campbell Product Designer	1,000 6,000	0 10,000	500 500	60,000 45,000	1,000 10,000
Sarah Caplan Product Designer	1,000 4,000	0 10,000	500 500	45,000 45,000	1,000 10,000
Akanksha Garg Product Designer	2,000 12,000	0 10,000	500 500	50,000 45,000	1,000 10,000
Tammy Hsia-Hahn Lead Product Manager	1,000 10,000	0 10,000	500 500	100,000 45,000	1,000 10,000
David Price Product Designer	3,000 6,000	0 10,000	500 500	45,000 45,000	1,000 10,000
Quin Sandoval Product Designer	1,000 3,000	0 10,000	500 500	30,000 45,000	1,000 10,000
Vishal Sidhpura Senior Product Manager	2,000 8,000	0 10,000	500 500	80,000 45,000	1,000 10,000
Victoria Stephen Lead Product Designer	3,000 4,000	0 10,000	500 500	50,000 45,000	1,000 10,000
Roger Yeh Senior Product Designer	2,000 12,000	0 10,000	500 500	0 45,000	1,000 10,000

Compensation Task - Pending Approvals Tab

When a compensation manager is viewing a compensation task, the Pending Approvals tab only displays a column for components that are configured to be visible in the compensation task. If all components are hidden, then only the Name and Status columns are displayed.

To access the Pending Approvals tab of a compensation task, go to **Home > Scheduled Tasks**. Click the compensation task title. Then, click the Pending Approvals tab.



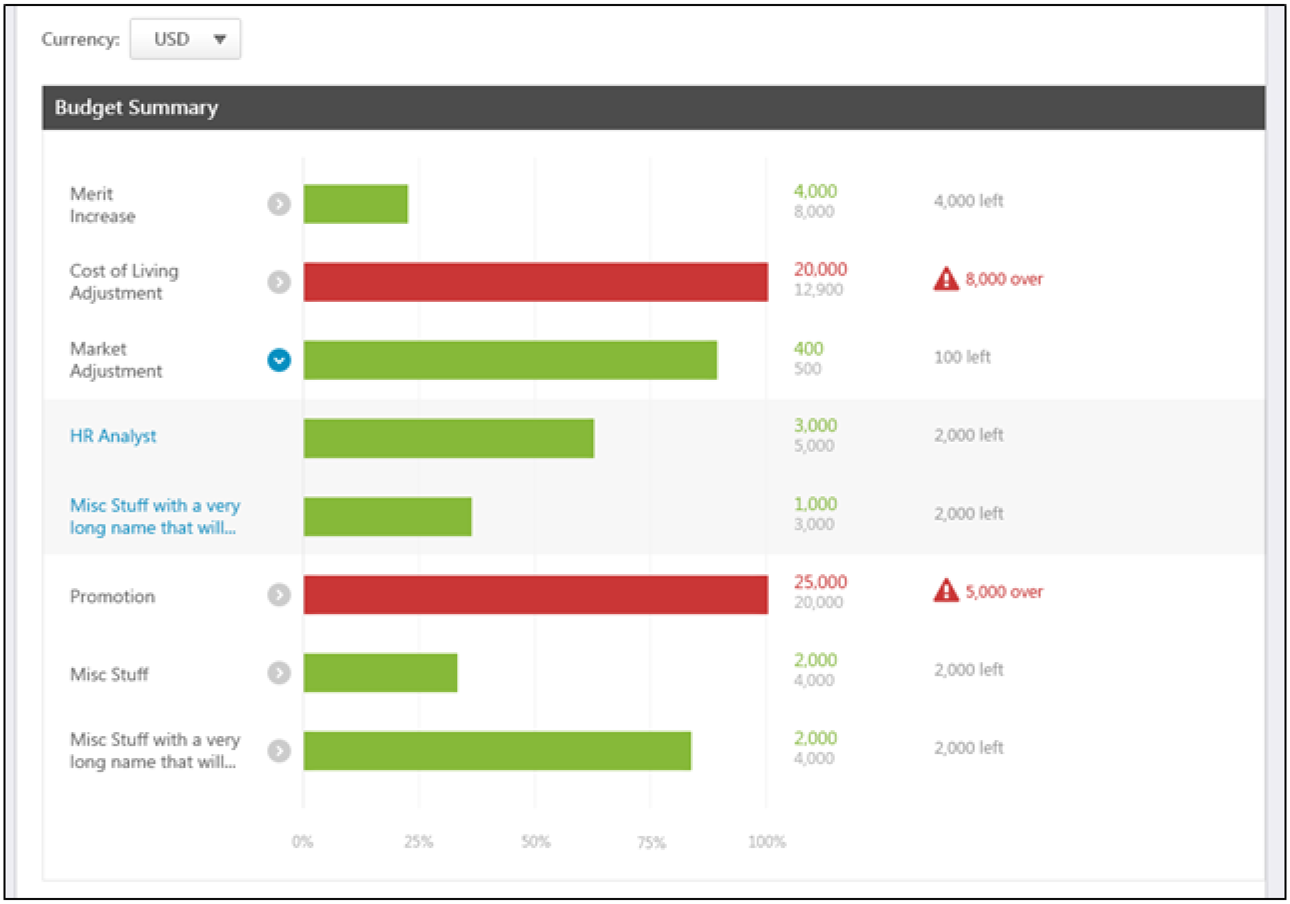
Compensation Task and Template Data Migration

In 2013, compensation tasks and templates were enhanced to enable administrators to configure the layout of the compensation task and templates. For all compensation tasks and templates that were created prior to these enhancements, the compensation task and template data is migrated to include the new functionality. By default, all columns are visible, which does not impact the compensation tasks.

Compensation Plan - Budget Summary Graph

When a compensation manager is completing a compensation plan, the Budget Summary graph only displays budget information for components that are configured to be visible in the corresponding compensation template. If all components are hidden from the Budget Summary graph, then the entire Budget Summary graph is hidden.

If the Budget Layout section of the compensation template is updated and the template is not reversioned, then the Budget Summary graph is updated with the changes.



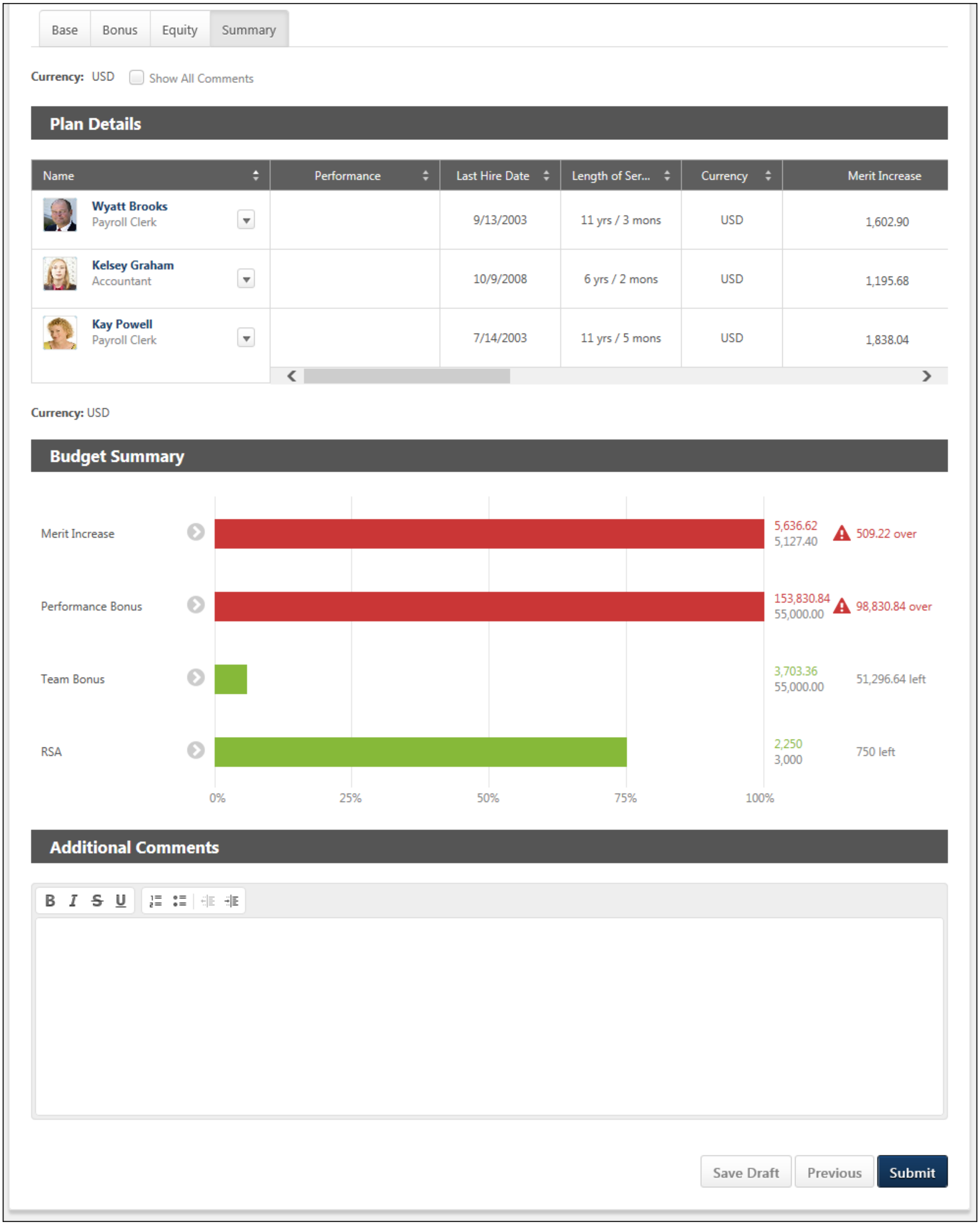
Compensation Plan - Summary/Approval Tab

When a compensation manager is completing a compensation plan, the Budget Summary graph on the Summary/Approval tab only displays budget information for components that are configured to be visible in the compensation task. If all components are hidden from the Budget Summary graph, then the entire Budget Summary graph is hidden.

Hiding a component from the Summary Tab/Approve Compensation Plan page hides the component from the Budget Summary graph but it does not hide the component as a column.

To access the Summary tab when creating a compensation plan, click the Summary tab. This is always the last tab in the compensation plan.

To access the Approval view of a compensation plan, view a compensation plan for which you are an approver. The Approval view is only available when the compensation manager is an approver for the compensation plan but does not have editing rights.


Base
Bonus
Equity
Summary
Currency: USD
Show All Comments
Plan Details
Name
Performance
Last Hire Date
Length of Ser...
Currency
Merit Increase
Wyatt Brooks
Payroll Clerk
9/13/2003
11 yrs / 3 mons
USD
1,602.90
Kelsey Graham
Accountant
10/9/2008
6 yrs / 2 mons
USD
1,195.68
Kay Powell
Payroll Clerk
7/14/2003
11 yrs / 5 mons
USD
1,838.04
Currency: USD
Budget Summary
Merit Increase
5,636.62
5,127.40
509.22 over
Performance Bonus
153,830.84
55,000.00
98,830.84 over
Team Bonus
3,703.36
55,000.00
51,296.64 left
RSA
2,250
3,000
750 left
0%
25%
50%
75%
100%
Additional Comments
Save Draft
Previous
Submit

Load up to 50 Users per Plan Page

With this enhancement, up to 50 users will automatically display when a compensation plan is opened. In addition, compensation managers have the option to change how many users are displayed per page.

The number of users in the compensation plan determines how many users are displayed when the compensation plan is opened and which display options are available.

- If there are 1-15 users in the compensation plan, then the following occurs:
  - All users are displayed when the compensation plan is opened.
  - The **Show Items** drop-down menu is not available because all users are always displayed.
- If there are 16-25 users in the compensation plan, then the following occurs:
  - All users are displayed when the compensation plan is opened.
  - The following options are available in the **Show Items** drop-down menu:
    - 15 Items
    - All Items - This option is selected by default.
- If there are 26-50 users in the compensation plan, then the following occurs:
  - All users are displayed when the compensation plan is opened.
  - The following options are available in the **Show Items** drop-down menu:
    - 15 Items
    - 25 Items
    - All Items - This option is selected by default.
- If there are more than 50 users in the compensation plan, then the following occurs:
  - 50 users are displayed when the compensation plan is opened.
  - The following options are available in the **Show Items** drop-down menu:
    - 15 Items
    - 25 Items
    - 50 Items - This option is selected by default.

Use Case

1. A compensation task has 51 users, but the Base tab has eligibility criteria for which only 49 users are eligible.
2. The Base tab is opened and all 49 eligible users are displayed. The following options are available in the **Show Items** drop-down menu:
   A. 15 Items
   B. 25 Items

   C. All Items - This option is selected by default.
3. The **Show Ineligible Employees** option is selected and there are now 51 eligible users. 50 users are displayed. The following options are available in the **Show Items** drop-down menu:
   A. 15 Items
   B. 25 Items
   C. 50 Items - This option is selected by default.
4. The Bonus tab is opened and 50 users are displayed. The following options are available in the **Show Items** drop-down menu:
   A. 15 Items
   B. 25 Items
   C. 50 Items - This option is selected by default.

Implementation

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

Promoted Link in Compensation Plan

With this enhancement, when a Compensation Manager promotes an employee to an organizational unit (OU) in a compensation Plan, then a **Promoted** link will appear in the user's User Card. The **Promoted** link only displays if a Promotion component is added to the task, and **Include Promotion Criteria** is selected in the compensation template. The link will be visible in the Base tab and the Approve Compensation Plans/Summary tab.

When clicking the link in the compensation plan, the Promotion pop-up opens. For users who have permission to edit during approval, they can edit the promotion in the Base tab.

When accessing an existing compensation task and a user has been promoted, then the **Promoted** link displays.

Note: *If the user is given a promotion, and then the promotion is removed, the* Promoted *link is removed.*

User Records Administration - Employee Salary

With this enhancement, a new Employee Salary icon is available in the Options column of User Records Administration page. This option is available to administrators who have permission to view users and manage employee salaries. Selecting this option opens the Employee Salary Management page for the user. There, the administrator can add, remove, and update the user's salaries.

Implementation

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

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Salary Management	Grants access to the Employee Salary Management page to edit, add, and view users' salaries or rates. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Compensation - Administration
Users - View	Grants ability to search for and view summary information about users in the portal, via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.	Core Administration

View Average Merit Increases

View Average Merit Increases

Prior to this enhancement, there was not an option for a compensation manager or approver to view the average merit increase in a compensation task.

With this enhancement, compensation managers and approvers may have easy access to view the average merit increase in a compensation task. The average merit increase percentage can be viewed per component and per organizational unit (OU). This assists in enabling compensation managers to allocate within a definitive average merit increase allocation during compensation planning.

Considerations

Only base components are impacted. This enhancement does not impact bonus and equity components.

The Average Allocation and Average Increase cannot both be displayed. If both are enabled via backend settings, then only the Average Increase is displayed.

The values are displayed using the compensation decimals of precision for percentages.

Implementation

This functionality is controlled by a backend setting and is disabled by default. This functionality is available upon request in Stage, Live, and Pilot portals for organizations using the Compensation module.

When this functionality is enabled, all new and existing compensation tasks are impacted.

Compensation Plan - Average Increase Display

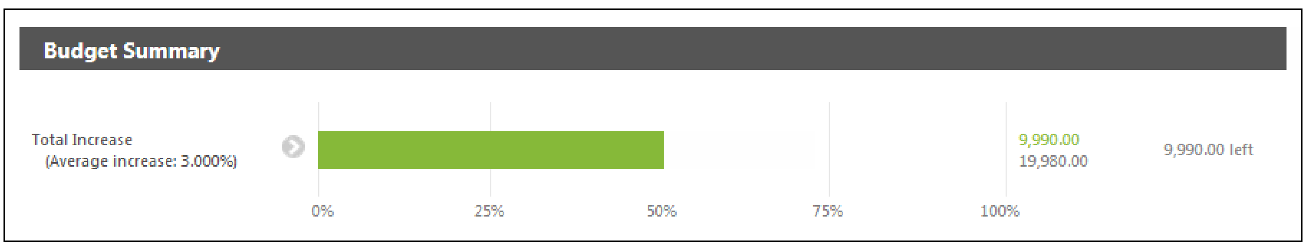
With this enhancement, organizations may choose to display the average merit increase in a compensation task. The average merit increase percentage can be viewed per component and per organizational unit (OU). This is only available for base components. Organizations can choose to display either the Average Allocation percentage or the Average Increase percentage:

- Average Allocation - This displays the average of all allocation percentages for the component or OU. *See* **Use Case - Average Allocation** *on* page 87 *for additional information.*
- Average Increase - This displays the average of all budget increase percentages for the component or OU. This is calculated using the overall ratio of allocations to current salary. *See* **Use Case - Average Increase** *on* page 88 *for additional information.*

The values are displayed using the compensation decimals of precision for percentages. If automatic lump sum adjustments are enabled for merit increase, then these allocations are included in the Average Allocation and Average Increase calculations.

Only one value can be displayed. If both values are enabled, then only the Average Increase is displayed.

These values are displayed in the Budget Summary graphs on the Base tab, Summary tab, and Approve Compensation Plans tab.



Use Case - Average Allocation

The following budgets are set for the compensation task:

ORGANIZATIONAL UNIT (OU)	MERIT INCREASE BUDGET BY OU	COST OF LIVING BUDGET BY OU
Division A	3%	5%
Division B	4%	4%
Division C	3.5%	3.5

The following users are in the compensation plan:

USER	OU	CURRENT SALARY/HOURLY RATE
User 1	Division A	10,000 USD
User 2	Division B	20,000 GBP (30,000 USD)
User 3	Division C	30,000 USD
User 4	Division A	40 USD/hour; 2080 hours/year (83,200 USD Annualized)

The decimals of precision that are used for percentages in compensation is 2.

The following allocations are given in the compensation plan:

USER	MERIT INCREASE	COST OF LIVING
User 1	3% (300 USD)	4% (400 USD)
User 2	4% (800 GBP; 1200 USD)	5% (1000 USD; 1500 USD)
User 3	3.5% (1050 USD)	3% (900 USD
User 4	2.5% (2080 USD)	2% (1664 USD)
Total	4630 USD	4464 USD

The average allocation is calculated by finding the average of all allocation percentages. The following average allocations result from the compensation plan:

DIVISION	MERIT INCREASE	COST OF LIVING
Division A (Users 1 & 4)	(3% + 2.5%) / 2 = 2.75%	(4% + 2%) / 2 = 3.00%
Division B (User 2)	4% / 1 = 4.00%	5% / 1 = 5.00%
Division C (User 3)	3.5% / 1 = 3.50%	3% / 1 = 3.00%
Overall	(3% + 4% + 3.5% + 2.5%) / 4 = 3.25%	(4% + 5% + 3% + 2%) / 4 = 3.50%

Use Case - Average Increase

The following budgets are set for the compensation task:

ORGANIZATIONAL UNIT (OU)	MERIT INCREASE BUDGET BY OU	COST OF LIVING BUDGET BY OU
Division A	3%	5%
Division B	4%	4%
Division C	3.5%	3.5

The following users are in the compensation plan:

USER	OU	CURRENT SALARY/HOURLY RATE
User 1	Division A	10,000 USD
User 2	Division B	20,000 GBP (30,000 USD)
User 3	Division C	30,000 USD
User 4	Division A	40 USD/hour; 2080 hours/year (83,200 USD Annualized)

The decimals of precision that are used for percentages in compensation is 2.

The following allocations are given in the compensation plan:

USER	MERIT INCREASE	COST OF LIVING
User 1	3% (300 USD)	4% (400 USD)
User 2	4% (800 GBP; 1200 USD)	5% (1000 USD; 1500 USD)
User 3	3.5% (1050 USD)	3% (900 USD
User 4	2.5% (2080 USD)	2% (1664 USD)
Total	4630 USD	4464 USD

The average budget increase is calculated by dividing the total allocations by the total original salaries. The following average budget increases result from the compensation plan:

DIVISION	MERIT INCREASE	COST OF LIVING
Division A (Users 1 & 4)	(300 + 2,080) / (10,000 + 83,200) = 2.55%	(400 + 1,664) / (10,000 + 83,200) = 2.21%
Division B (User 2)	1,200 / 30,000 = 4.00%	1,500 / 30,000 = 5.00%
Division C (User 3)	1,050 / 30,000 = 3.50%	900 / 30,000 = 3.00%

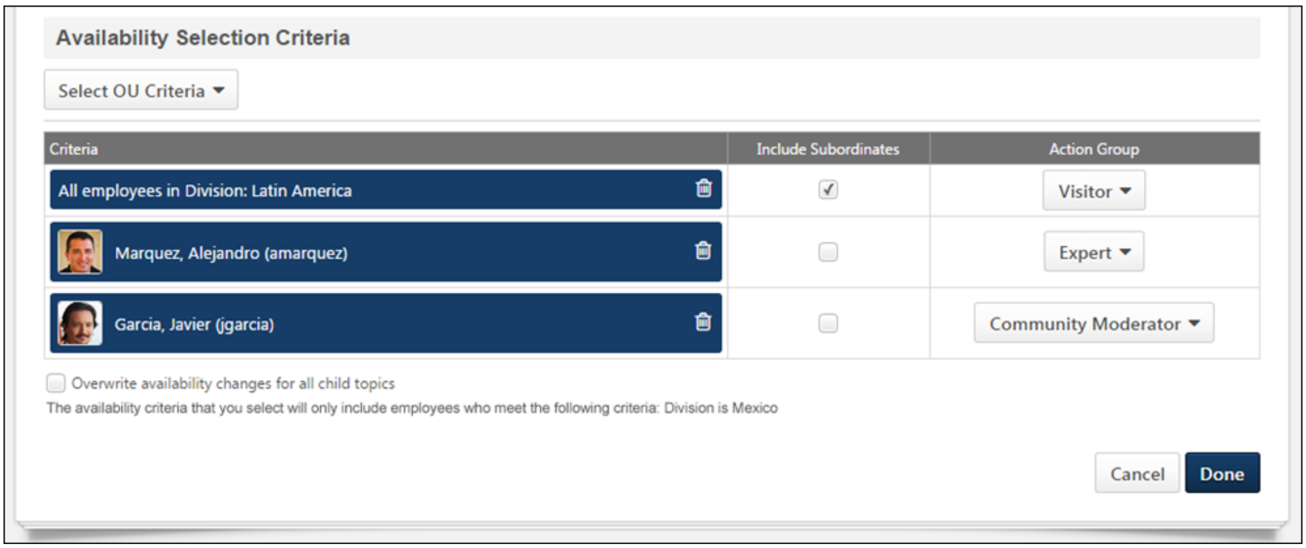
DIVISION	MERIT INCREASE	COST OF LIVING
Overall	(300 + 1,200 + 1,050 + 2,080) / (10,000 + 30,000 + 30,000 + 83,200) = 3.02%	(400 + 1,500 + 900 + 1,664) / (10,000 + 30,000 + 30,000 + 83,200) = 2.91%

Connect

Community and Topic Availability Selection Criteria

When an administrator creates a community or topic, their creator constraints are automatically applied to the availability of the community or topic. That is, whatever constraints are applied to the administrator's permission to create a community or topic (i.e., the Manage Knowledge Bank/Communities Administration permission) or edit community or topic availability (i.e., Edit Availability Knowledge Bank/Communities) are automatically applied to the availability of the community or topic.

With this enhancement, when editing a topic or a community, the Availability Selection Criteria section now displays the creator constraints that are automatically applied to the community or topic's availability. This enables administrators, community moderators, and topic moderators to fully understand the availability of the community or topic. If the constraints change, then the updated constraints are displayed.



Use Case

Bob is the current administrator for the New Hire Orientation community. His predecessor created the community, but has since moved to another country. Now that Bob has the ability to modify the community's availability, he appreciates that the existing constraints are displayed whenever he edits the community. This way, he can be fully informed on the availability settings.

Implementation

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

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edit Availability Knowledge Bank/Communities	Grants ability to configure the availability when editing communities or when creating or editing topics. This permission does not grant the ability to edit a community; users can only edit a community or topic if they have the Manage Knowledge Bank/Communities Administration or if they are a moderator for the community or topic. When creating a topic, the constraints on this permission are automatically applied to the topic's availability. If the user also has the Manage Knowledge Bank/Communities Administration permission, then the constraints on that permission are automatically applied to the topic's availability. This permission can be constrained by OU, User's OU, and User's Corporation.	New Connect

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. When creating a topic, the constraints on this permission are automatically applied to the topic's availability. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New 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. For more information about this functionality, contact 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.

Connect Email Digests

Connect Email Digests

Prior to the introduction of email digests, individual emails were sent to recipients based on defined email triggers.

With the July 2015 Release, email digests were introduced. 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.

With this enhancement, new email digest sections are available for Connect. This enhancement reduces the number of emails a user receives and lowers the chance that an email notification is missed.

- Communities Postings - This dynamic section is intended to alert recipients that there is one or more new postings available in the recipient's Connect communities. This dynamic section can be configured to display the details of each new posting. If there has not been a new community posting that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user.
- Team Feed Updates - This dynamic section is intended to alert recipients that there is one or more new user updates available in the recipient's Connect team feeds. This dynamic section can be configured to display the details of each new team feed update. If there has not been a new team feed update that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user.
- Team Tasks Summary - This dynamic section is intended to alert recipients that there is one or more active team tasks available in the recipient's Connect teams. This dynamic section can be configured to display the details of each active team task. If there is not an active team task that is available to the user, then this section is not included in the email digest for the user.

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.

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, Live, and Pilot portals for all organizations using New Connect.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
Email Digest Administration - View	Grants ability to view email digests. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

Email Digest - Add Section

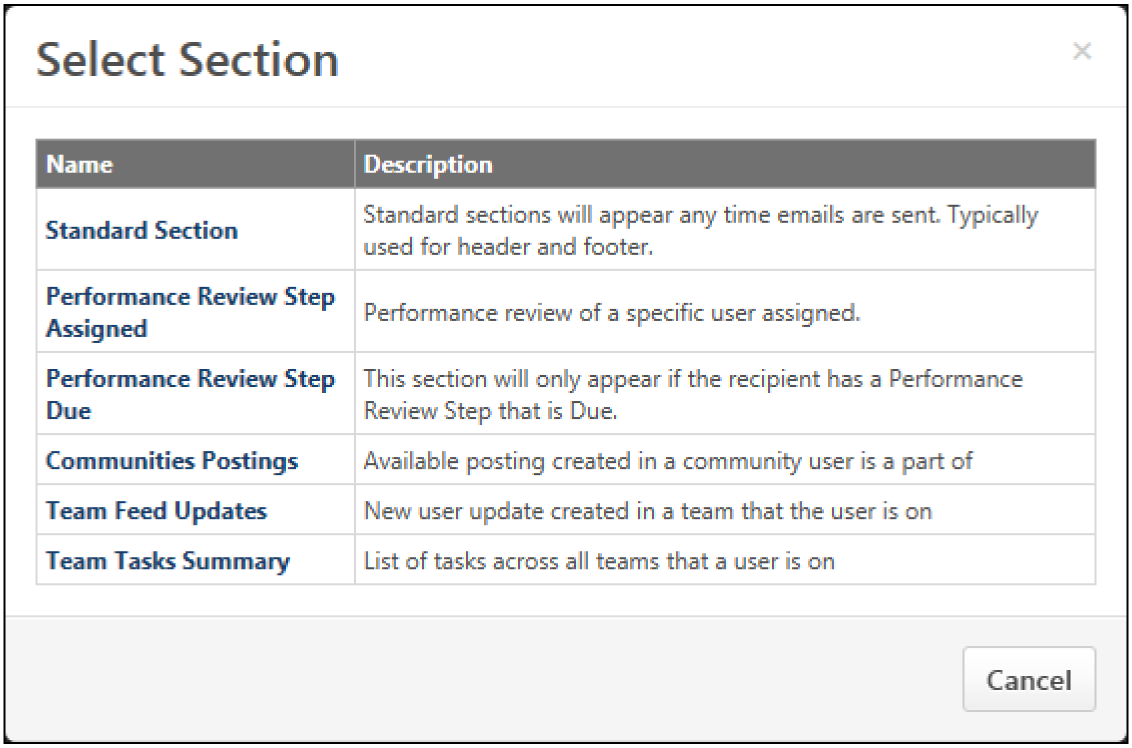
When adding a section to an email digest, the following email digest sections are now available:

- Communities Postings - This dynamic section is intended to alert recipients that there is one or more new postings available in the recipient's Connect communities. This dynamic section can be configured to display the details of each new posting. If there has not been a new community posting that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user. *See* **Community Postings Section** *on* page 101 *for additional information.*
- Team Feed Updates - This dynamic section is intended to alert recipients that there is one or more new user updates available in the recipient's Connect team feeds. This dynamic section can be configured to display the details of each new team feed update. If there has not been a new team feed update that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user. *See* **Team Feed Updates Section** *on* page 103 *for additional information.*
- Team Tasks Summary - This dynamic section is intended to alert recipients that there is one or more active team tasks available in the recipient's Connect teams. This dynamic section can be configured to display the details of each active team task. If there is not an active team task that is available to the user, then this section is not included in the email digest for the user. *See* **Team Tasks Summary Section** *on* page 105 *for additional information.*

To add a section to an email digest, click the **ADD SECTION** button in the *Sections* section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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



Name	Description
Standard Section	Standard sections will appear any time emails are sent. Typically used for header and footer.
Performance Review Step Assigned	Performance review of a specific user assigned.
Performance Review Step Due	This section will only appear if the recipient has a Performance Review Step that is Due.
Communities Postings	Available posting created in a community user is a part of
Team Feed Updates	New user update created in a team that the user is on
Team Tasks Summary	List of tasks across all teams that a user is on

Community Postings Section

This dynamic section is intended to alert recipients that there is one or more new postings available in the recipient's Connect communities. This dynamic section can be configured to display the details of each new posting. If there has not been a new community posting that is available to the user 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 **Send To** option for a Community Postings section, the following relation options are available:

- Community Moderator
- Topic Moderator
- Community Members
- Followers

Section Specific Tags

When configuring the section body for a Community Postings section, the following tags are available:

- {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.
- {LIST.BEGIN} - *See the Repeater Tags section below.*
- {LIST.END} - *See the Repeater Tags section below.*
- {POSTING.CREATE.DATE} - This displays the date on which the posting was created.
- {COMMUNITY.POSTING.TITLE} - This displays the title of the posting.
- {COMMUNITY.POSTING.LINK} - This displays a hyperlink that navigates the user to the posting.
- {COMMUNITY.TOPIC.TITLE} - This displays the title of the topic in which the posting was created.
- {COMMUNITY.TITLE} - This displays the title of the community in which the posting was created.
- {POSTING.AUTHOR.FIRST.NAME} - This displays the first name of the user who created the posting.
- {POSTING.AUTHOR.LAST.NAME} - This displays the last name of the user who created the posting.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

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.

Sample Section Text

The following is an example of how a Community Postings section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

{LIST.BEGIN}

{POSTING.AUTHOR.FIRST.NAME} {POSTING.AUTHOR.LAST.NAME} has created a new posting in "{COMMUNITY.TITLE}: {COMMUNITY.TOPIC.TITLE}" titled "{COMMUNITY.POSTING.TITLE}." Click here {COMMUNITY.POSTING.LINK} to view the posting!

{LIST.END}

Team Feed Updates Section

This dynamic section is intended to alert recipients that there is one or more new user updates available in the recipient's Connect team feeds. This dynamic section can be configured to display the details of each new team feed update. If there has not been a new team feed update that is available to the user 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 **Send To** option for a Team Feed Updates section, the following relation options are available:

- Team Members
- Team Leads

Section Specific Tags

When configuring the section body for a Team Feed Updates section, the following tags are available:

- {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.
- {LIST.BEGIN} - *See the Repeater Tags section below.*
- {LIST.END} - *See the Repeater Tags section below.*
- {UPDATE.CREATE.DATE} - This displays the date on which the update was created.
- {CONNECT.TEAM.TITLE} - This displays the title of the team in which the update was created.
- {CONNECT.TEAM.LINK} - This displays a hyperlink that navigates the user to the corresponding team.
- {CONNECT.USER.UPDATE} - This displays the text of the user update.
- {UPDATE.AUTHOR.FIRST.NAME} - This displays the first name of the user who created the update.
- {UPDATE.AUTHOR.LAST.NAME} - This displays the last name of the user who created the update.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

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.

Sample Section Text

The following is an example of how a Team Feed Updates section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

{LIST.BEGIN}

{UPDATE.AUTHOR.FIRST.NAME} {UPDATE.AUTHOR.LAST.NAME} has posted to your Connect team.

Team: {CONNECT.TEAM.TITLE}

Update: {CONNECT.USER.UPDATE}

Team Link: {CONNECT.TEAM.LINK}

{LIST.END}

Team Tasks Summary Section

This dynamic section is intended to alert recipients that there is one or more active team tasks available in the recipient's Connect teams. This dynamic section can be configured to display the details of each active team task. If there is not an active team task that is available to the user, then this section is not included in the email digest for the user.

Section Send To Options

When configuring the **Send To** option for a Team Tasks Summary section, the following relation options are available:

- Team Members
- Team Leads
- Task Assignees

Section Specific Tags

When configuring the section body for a Team Tasks Summary section, the following tags are available:

- {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.
- {LIST.BEGIN} - *See the Repeater Tags section below.*
- {LIST.END} - *See the Repeater Tags section below.*
- {TASK.CREATE.DATE} - This displays the date on which the task was created.
- {CONNECT.TASK.TITLE} - This displays the title of the task.
- {CONNECT.TEAM.TITLE} - This displays the title of the team in which the task was created.
- {CONNECT.TASK.LINK} - This displays a hyperlink that navigates the user to the task.
- {CONNECT.TEAM.LINK} - This displays a hyperlink that navigates the user to the corresponding team.
- {CONNECT.TASK.DUE.DATE} - This displays the date on which the task is due. If the task does not have a due date, then "--" is displayed.
- {TASK.ASSIGNEE.FIRST.NAME} - This displays the first name of the user who is assigned the task. If the task does not have an assignee, then "--" is displayed.
- {TASK.ASSIGNEE.LAST.NAME} - This displays the last name of the user who is assigned the task. If the task does not have an assignee, then "--" is displayed.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

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.

Sample Section Text

The following is an example of how a Team Tasks Summary section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

The following tasks have been assigned to your teams:

{LIST.BEGIN}

{CONNECT.TASK.TITLE} is created for the {CONNECT.TEAM.TITLE} team. This task is assigned to {TASK.ASSIGNEE.FIRST.NAME} {TASK.ASSIGNEE.LAST.NAME} and is due on {CONNECT.TASK.DUE.DATE}. Click here {CONNECT.TASK.LINK} to view the task. Click here {CONNECT.TEAM.LINK} to view the team.

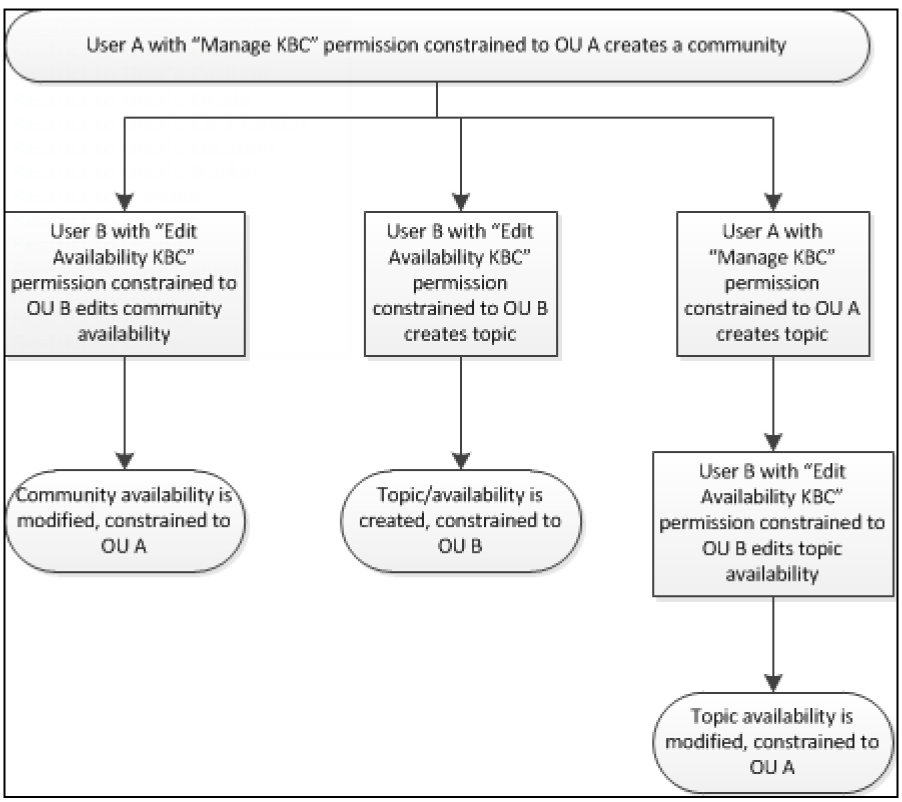
{LIST.END}

Edit Availability Knowledge Bank/Communities

Prior to this enhancement, the Manage Knowledge Bank/Communities Administration permission was required in order to modify the availability for communities and topics. However, this permission also granted users permission to create and delete communities and topics.

With this enhancement, a new Edit Availability Knowledge Bank/Communities permission is available, which enables users to configure the availability of communities and topics. Users with this permission must also be a community moderator or topic moderator in order to edit the community or topic. Users can edit community and topic availability if they have either the Manage Knowledge Bank/Communities Administration or Edit Availability Knowledge Bank/Communities permission.

Workflow - Creator Constraints



Use Case

Joanne is a higher level system administrator, and she creates communities for her entire multi-national organization. She creates communities for each territory and then delegates the maintenance of those communities to moderators that live in each of those territories. By assigning these moderators the permission that allows them to edit availability, Joanne can effectively delegate the maintenance of these communities without giving these moderators complete access to all communities.

Considerations

When creating a community, the new permission has no impact because administrators must have the Manage Knowledge Bank/Communities Administration permission to create a community, and this permission also grants the ability to edit the community's availability.

Implementation

Upon release, this functionality is automatically enabled in Stage, Live, and Pilot portals for organizations using New Connect. However, the new permission is not assigned to any roles by default.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edit Availability Knowledge Bank/Communities	Grants ability to configure the availability when editing communities or when creating or editing topics. This permission does not grant the ability to edit a community; users can only edit a community or topic if they have the Manage Knowledge Bank/Communities Administration or if they are a moderator for the community or topic. When creating a topic, the constraints on this permission are automatically applied to the topic's availability. If the user also has the Manage Knowledge Bank/Communities Administration permission, then the constraints on that permission are automatically applied to the topic's availability. This permission can be constrained by OU, User's OU, and User's Corporation.	New Connect

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities	Grants ability to view the New Knowledge Bank Administration page. Based on	New Connect

Administration	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. When creating a topic, the constraints on this permission are automatically applied to the topic's availability. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	

Following in Connect Redesign

Following in Connect Redesign

Prior to this enhancement, there was no way for a user to choose to receive notifications when there were updates to Connect content.

With this enhancement, users may choose to follow Connect communities, topics, postings, and authors. New email triggers are available to notify users of new postings and replies to items the user is following. New postings from authors, topics, and communities the user is following may appear in the Live Feed. Also, Universal Profile is enhanced to allow users to easily view all of the items a user is following and all of the postings a user has created.

Use Cases

Curtis works at Acme Co. and is automatically enrolled into a Customer Service Best Practices community. Curtis decides to "follow" the entire community in order to receive email notifications whenever new postings are added to the community. Later, Curtis realizes that he only finds value from the Intermediate and Expert topics. So, Curtis decides to unfollow the community and to specifically follow the Intermediate and Expert topics, which results in him receiving email notifications when new postings are added to these topics.

Implementation

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

Upon release, when a user requests or accepts a connection, the user automatically follows the connection. However, users can unfollow a connection. This behavior is not retroactive, meaning that all previously existing connections are not automatically followed.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. 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.	Universal Profile

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

Emails - Send to Followers

The following existing email triggers can now be sent to Followers:

- Knowledge Bank/Communities New Posting Created - In this email, the Followers recipient is any user who is following the community in which the posting was created, the topic in which the posting was created, or the author who created the posting.
- Knowledge Bank/Communities Reply - In this email, the Followers recipient is any user who is following the posting in which the reply was added.

With the October 2015 release, a new Communities Postings email digest is now available. This email digest can be sent to Followers. In this email digest, the Followers recipient is any user who is following the community in which the posting was created, the topic in which the posting was created, or the author who created the posting.

Bio About Preferences

With this enhancement, two additional sections are added to the Bio About Preferences page.

To access the Bio About Preferences page, go to **Admin > Tools > Core Functions > Universal Profile > Bio About**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About Preferences - Manage	Enables administrator to access and edit the Bio About 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

Following Panel

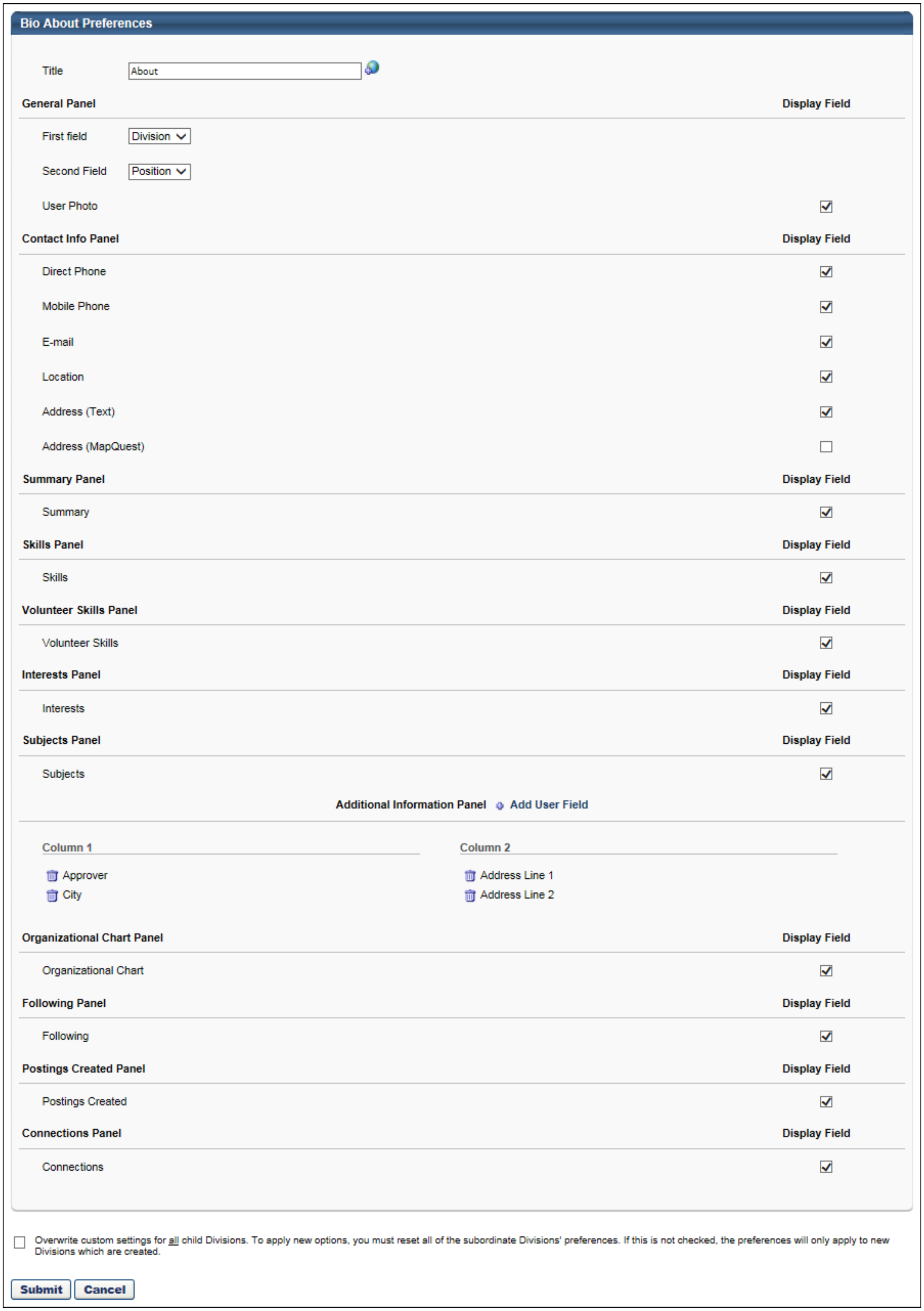
This section enables administrators to configure whether the *Following* section is displayed on the Bio page - About tab. If enabled, this section displays all of the communities, topics, and postings the user is currently following.

This functionality is only available to organizations using New Connect.

Postings Created Panel

This section enables administrators to configure whether the *Postings Created* section is displayed on the Bio page - About tab. If enabled, this section displays all of the postings the user has created.

This functionality is only available to organizations using New Connect.


Bio About Preferences
Title
About
General Panel
Display Field
First field
Division
Second Field
Position
User Photo
Contact Info Panel
Display Field
Direct Phone
Mobile Phone
E-mail
Location
Address (Text)
Address (MapQuest)
Summary Panel
Display Field
Summary
Skills Panel
Display Field
Skills
Volunteer Skills Panel
Display Field
Volunteer Skills
Interests Panel
Display Field
Interests
Subjects Panel
Display Field
Subjects
Additional Information Panel
Add User Field
Column 1
Approver
City
Column 2
Address Line 1
Address Line 2
Organizational Chart Panel
Display Field
Organizational Chart
Following Panel
Display Field
Following
Postings Created Panel
Display Field
Postings Created
Connections Panel
Display Field
Connections
Overwrite custom settings for all child Divisions. To apply new options, you must reset all of the subordinate Divisions' preferences. If this is not checked, the preferences will only apply to new Divisions which are created.
Submit
Cancel

Connect Preferences - Follow Postings

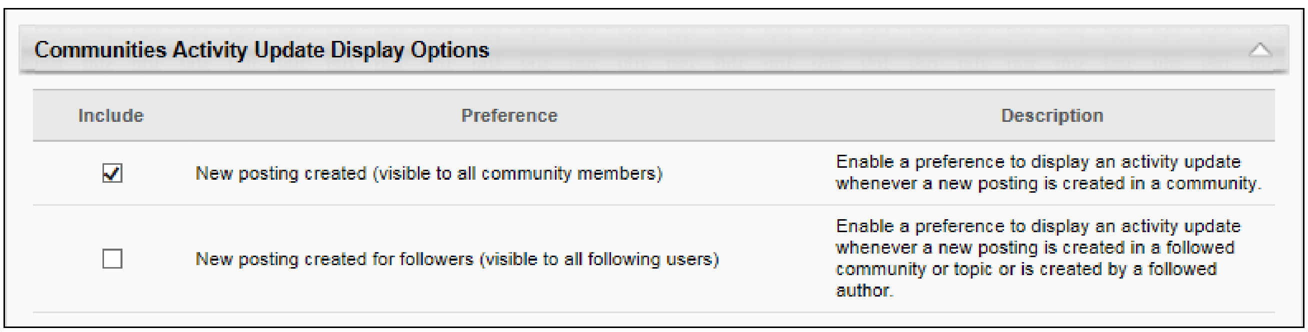
With this enhancement, the Connect Preferences page is enhanced. The Communities Activity Update Display Options section is updated with a new option to enable new postings to appear in the Live Feed for users who are following the postings community or topic.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View New Connect Preferences	Grants ability to view and manage the New Connect Preferences. This permission can be constrained by OU and User's OU.	New Connect

New posting created for followers (visible to all following users) - When this option is selected, an activity update will appear in the Live Feed for a user if the user is following the community or topic in which a posting is created.



Communities Activity Update Display Options

Include	Preference	Description
☑	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.
☐	New posting created for followers (visible to all following users)	Enable a preference to display an activity update whenever a new posting is created in a followed community or topic or is created by a followed author.

Community - Follow Community

When viewing the Main and Topics tabs of a community, users now have the option to follow or unfollow the community.

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

Permissions

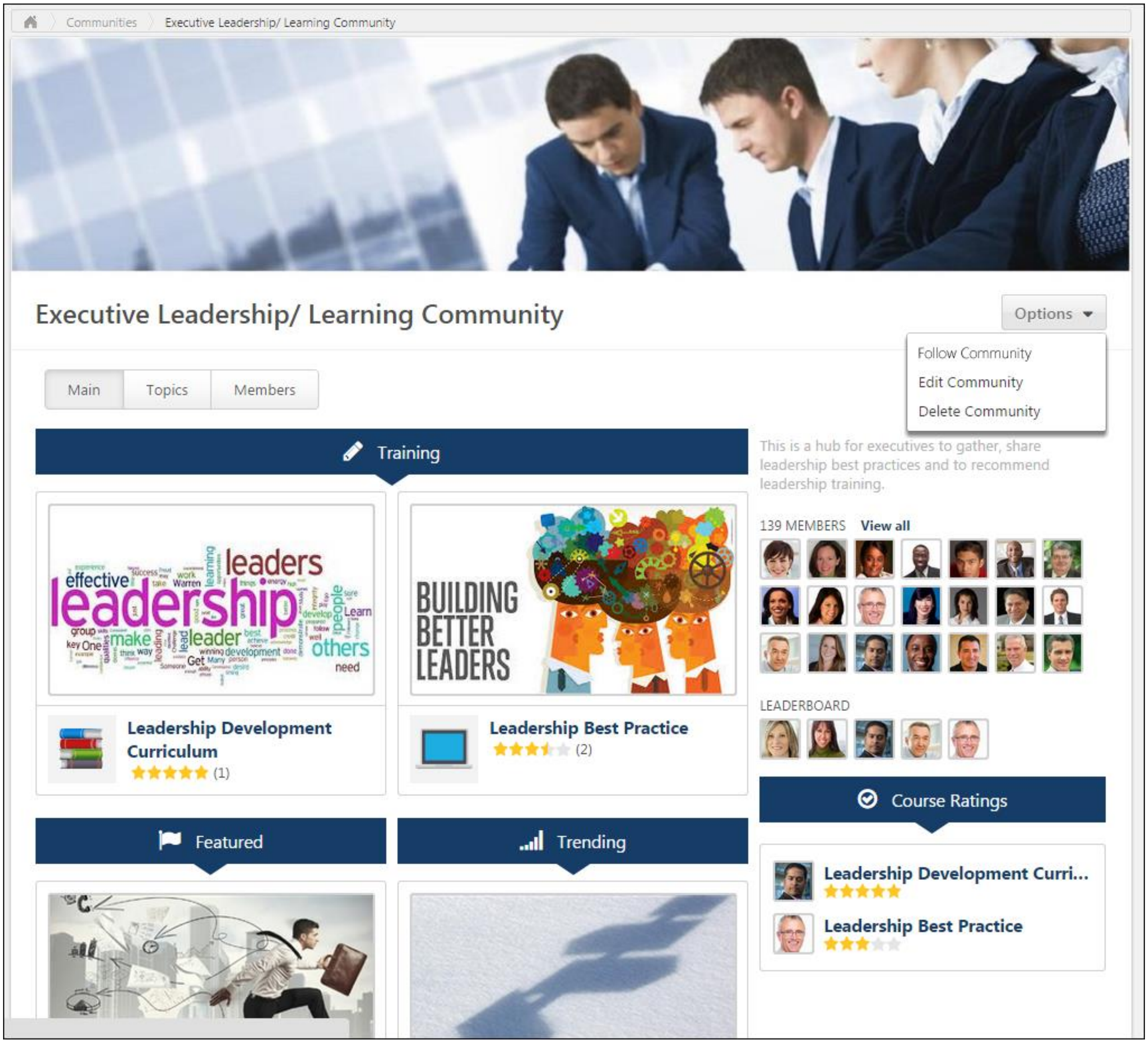
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Communities pages. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

On the Main tab, an **Options** drop-down menu already exists for administrators. On the Topics tab, the **CREATE TOPIC** button is replaced with an **Options** drop-down menu.

From the **Options** drop-down menu, users have the option to follow the community.

The **Follow Community** option is available to all users who are members of the community. When a user is following a community, the user may receive email notifications whenever a posting is created in any of the topics that are available to the user within the community. Also, the community appears in the *Following* section of the user's Universal Profile: Bio. When a user follows a community, the user implicitly follows all of the topics and subtopics within the community. Because of this, the user does not have the option to follow or unfollow any topic within the community while the user is following the community.

After a user follows a community, the **Follow Community** option is replaced with an **Unfollow Community** option. When a user selects this option, the user is no longer following the community or any of the topics within the community. If the user had followed any individual topics within the community prior to following the community, then the user is still following those topics when the community is unfollowed.



Communities
Executive Leadership/ Learning Community
Executive Leadership/ Learning Community
Options
Follow Community
Edit Community
Delete Community
Main
Topics
Members
Training
This is a hub for executives to gather, share leadership best practices and to recommend leadership training.
139 MEMBERS View all
BUILDING BETTER LEADERS
Leadership Development Curriculum
(1)
Leadership Best Practice
(2)
LEADERBOARD
Course Ratings
Featured
Trending
Leadership Development Curri...
Leadership Best Practice


Communities
Executive Leadership/ Learning Community
Topics
Executive Leadership/ Learning Community
Options
Follow Community
Create Topic
Main
Topics
Members
Articles
Please post any relevant articles that you think will resonate well ...
C-level
Additional material targeting leaders who perform at the C-level ...

Topic Details Page - Follow Topic

When viewing the Topic Details page for a topic, users now have the option to follow or unfollow the topic.

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

Permissions

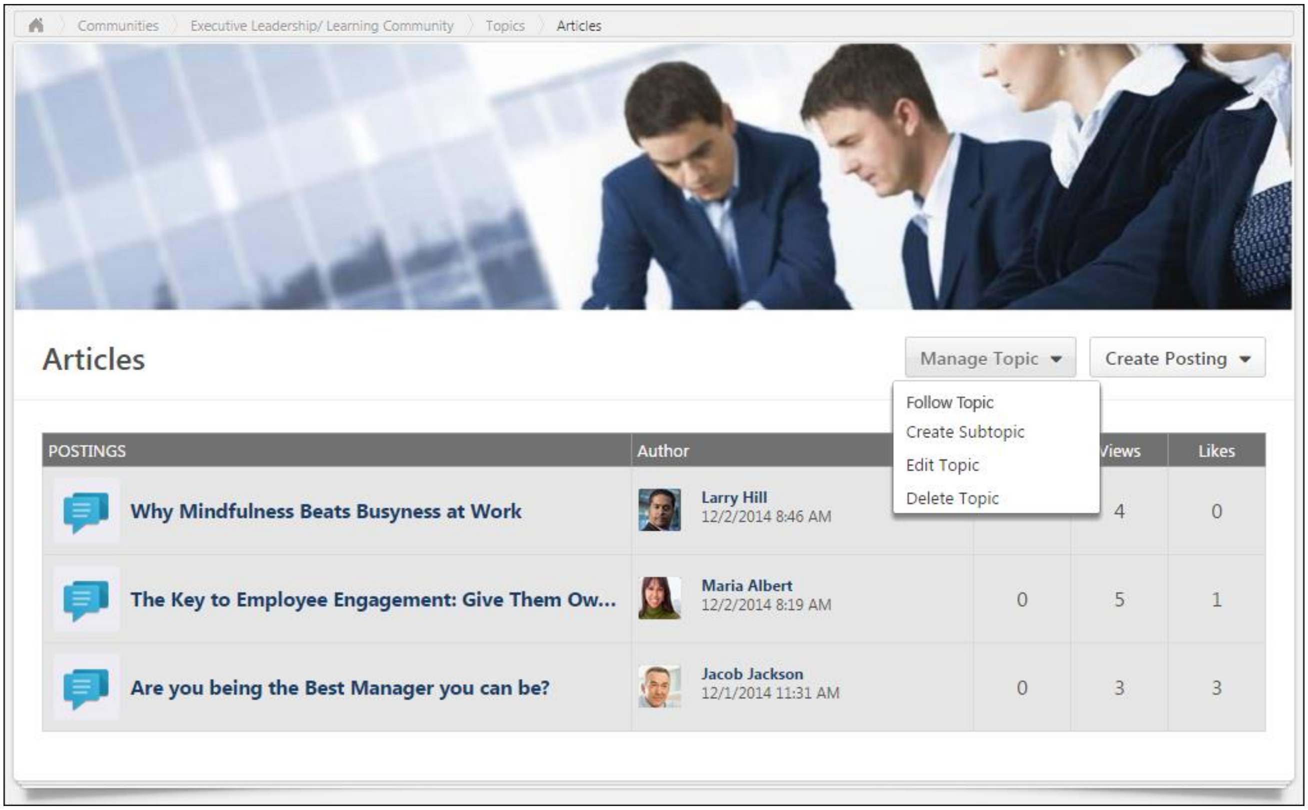
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Communities pages. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

From the **Manage Topic** drop-down menu, users now have the option to follow the topic. The **Follow Topic** option is available to all users who are members of the topic's community.

When a user is following a topic, the user may receive email notifications whenever a posting is created in the topic or any of the subtopics that are available to the user within the topic. Also, the topic appears in the *Following* section of the user's Universal Profile: Bio.

When a user follows a community, the user implicitly follows all of the topics and subtopics within the community. Because of this, the user does not have the option to follow or unfollow any topic within the community while the user is following the community. Similarly, when a user follows a topic, the user implicitly follows all of the subtopics within the parent topic. Because of this, the user does not have the option to follow or unfollow any subtopic within the parent topic while the user is following the topic.

After a user follows a topic, the **Follow Topic** option is replaced with an **Unfollow Topic** option. When a user selects this option, the user is no longer following the topic or any of the subtopics within the topic. If the user had followed any individual subtopics within the topic prior to following the topic, then the user is still following those subtopics when the parent topic is unfollowed.


Communities
Executive Leadership/ Learning Community
Topics
Articles
Articles
Manage Topic
Create Posting
Follow Topic
Create Subtopic
Edit Topic
Delete Topic
POSTINGS
Author
Views
Likes
Why Mindfulness Beats Busyness at Work
Larry Hill
12/2/2014 8:46 AM
4
0
The Key to Employee Engagement: Give Them Ow...
Maria Albert
12/2/2014 8:19 AM
0
5
1
Are you being the Best Manager you can be?
Jacob Jackson
12/1/2014 11:31 AM
0
3
3

Follow Posting

When viewing a posting, users now have the option to follow or unfollow the posting.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Knowledge Bank/Communities	Grants ability to view the Knowledge Bank and Communities pages. This permission can be constrained by OU and User's OU. This permission is assigned to the default Administrator role by default.	New Connect

From the **Options** drop-down menu, users now have the option to follow the posting. The **Follow Posting** option is available to all users who are members of the posting's community.

When a user is following a posting, the user may receive email notifications whenever a reply is added to the posting. Also, the posting appears in the *Following* section of the user's Universal Profile: Bio.

After a user follows a posting, the **Follow Posting** option is replaced with an **Unfollow Posting** option. When a user selects this option, the user is no longer following the posting.

Universal Profile: Bio

With this enhancement, users are now able to follow a Connect community, topic, posting, or individual. In order to support this functionality, the following enhancements are available on the Universal Profile: Bio - About tab:

- Follow User - A Follow option is available when viewing the Universal Profile of another user.
- Following Section - A Following section displays which Connect communities, topics, postings, or individuals the user is following.
- Postings Created Section - A Postings Created section displays the user's most recent Connect postings.

This functionality is intended to promote engagement and consumption of Connect content, both when a user is viewing their own profile and when viewing another user's profile.

This functionality is only available to organizations using New Connect.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. 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.	Universal Profile

Follow User

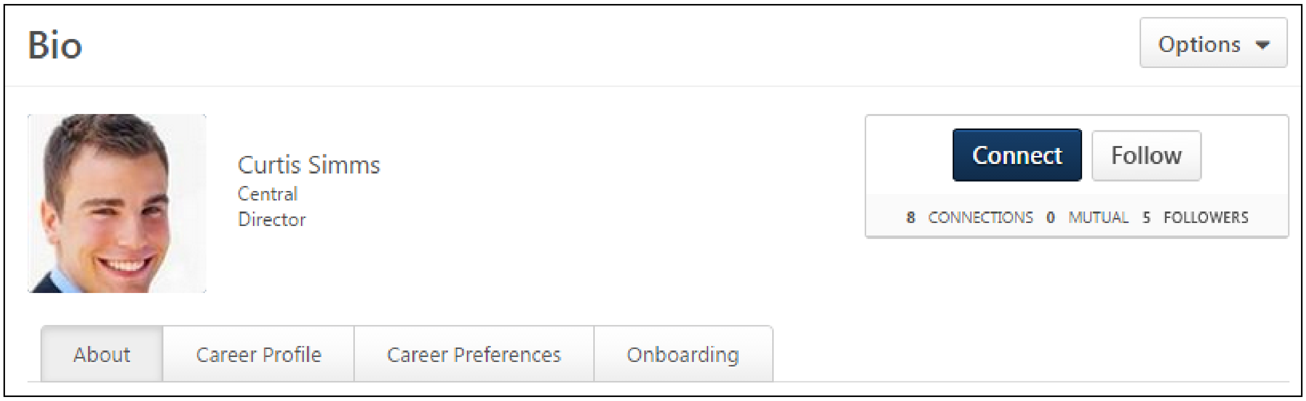
With this enhancement, connecting with a user or requesting to connect with a user automatically follows the user. When sending a connection request, this occurs immediately and does not require the user to accept the connection request. When accepting a connection request, this occurs as soon as the connection is accepted. Similarly, removing a connection automatically unfollows the user.

When viewing the Universal Profile of another user, users can choose to follow the user by clicking the **FOLLOW** button in the upper-right corner of their profile. If you are already following the user, then Followed is displayed. Click the **FOLLOWED** button to unfollow the user.

Below the **FOLLOW** button, the widget displays the number of followers the user has.

When following a user, you may receive a notification whenever the user creates a new posting. Also, the author is added to your Following section and the Bio - Following page.

This functionality is only available to organizations using New Connect.

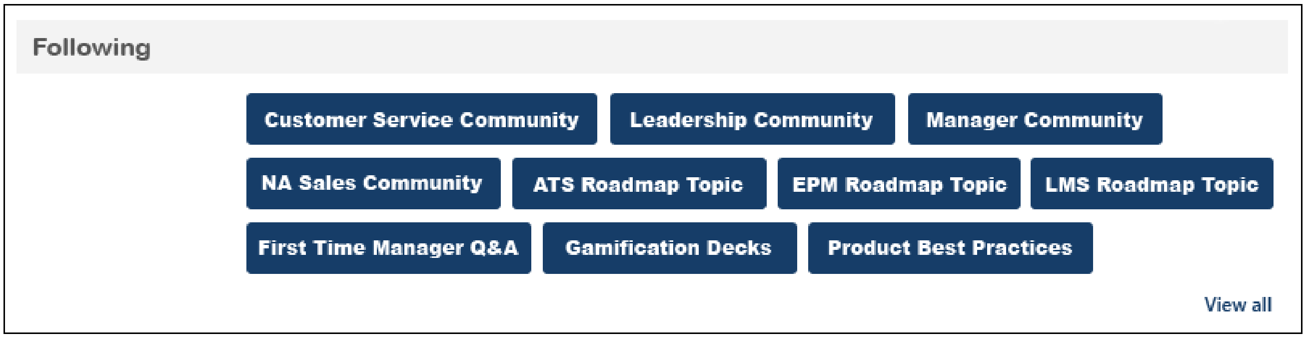


Following Section

This section only appears on this page if enabled by the administrator and if there is content that is available to the user. Also, this functionality is only available to organizations using New Connect.

This section displays all of the communities, topics, and postings the user is currently following. Communities are displayed first, in alphabetical order, followed by topics in alphabetical order and postings in alphabetical order. Click an item to open the community, topic, or posting.

An item is only displayed if the user who is viewing the page is within the availability of the item. Up to 10 items are displayed in this section. If there are more than 10 items available, click the **View all** link to view all of the items. *See* **Universal Profile: Bio - Following** *on* page 126 *for additional information.*

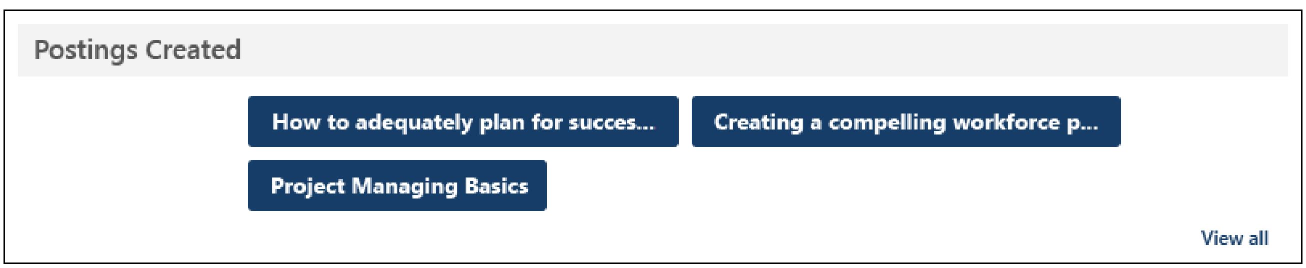


Postings Created Section

This section only appears on this page if enabled by the administrator and if there is content that is available to the user. Also, this functionality is only available to organizations using New Connect.

This section displays all of the postings the user has created. Postings are displayed in the order in which they were created with the most recently created posting displayed first. Click a posting to open the posting.

A posting is only displayed if the user who is viewing the page is within the availability of the posting. In addition, a posting is only displayed if the author is currently a member of the posting's community. Up to 10 items are displayed in this section. If there are more than 10 items available, click the **View all** link to view all of the items. *See* **Universal Profile: Bio - Postings Created** *on* page 128 *for additional information.*



Universal Profile: Bio - Following

With this enhancement, a new Following page is available within the Universal Profile: Bio.

The Following page displays all of the communities, topics, postings, and authors the user is following.

This functionality is only available to organizations using New Connect.

To access the Bio - Following page for a user, navigate to the user's Universal Profile page. Then, click the Bio tab. If the About subtab is not selected by default, click the About subtab. Then, click the **View all** link in the Following section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. 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.	Universal Profile

Edit Page

When viewing your own Following page, you have the option to edit which items are being followed.

To edit the Following page, click the Edit icon  in the upper-right corner of the page. The page refreshes, which allows you to remove a followed item and to add additional items.

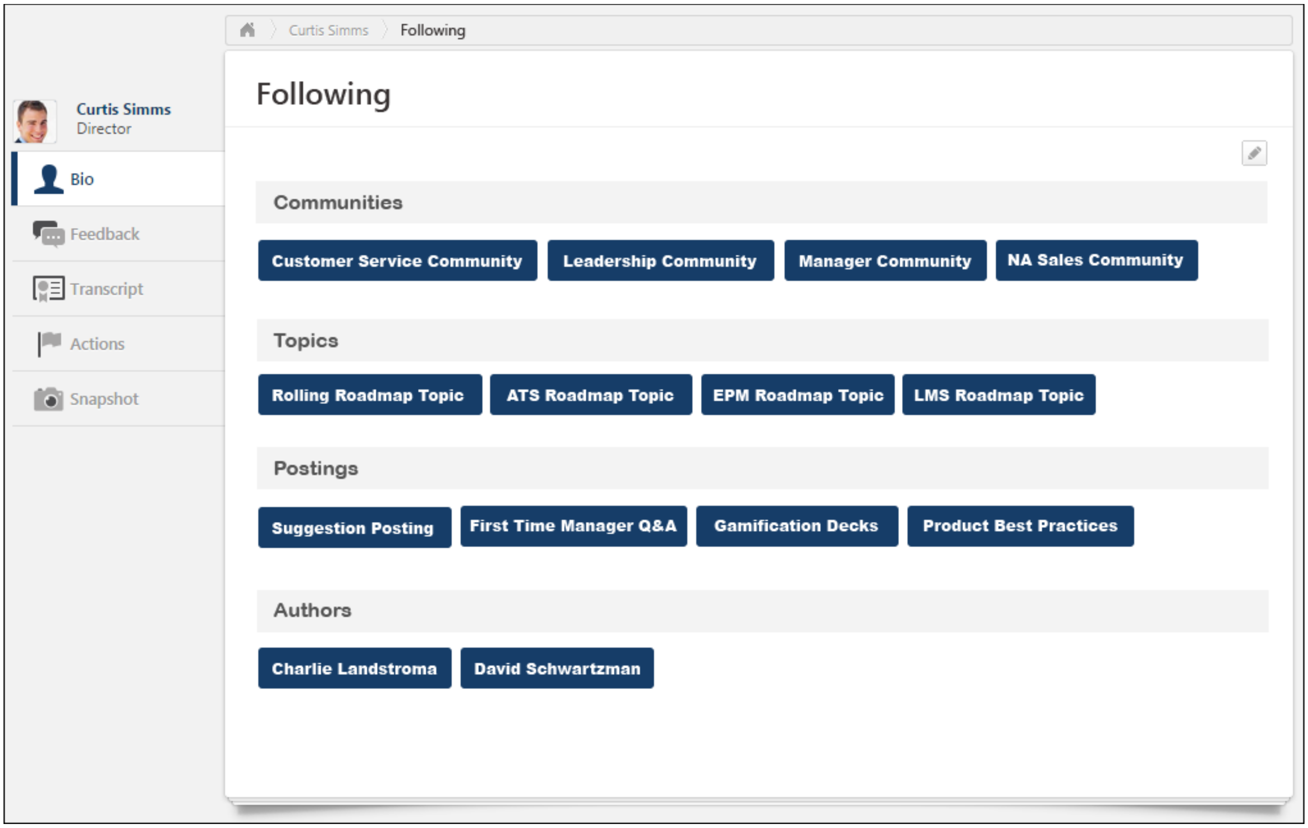
Followed Items and Authors

The items and authors that the user is following are categorized and displayed in alphabetical order. An item is only displayed if the user who is viewing the page is within the availability of the item. Each section is only displayed if there are available items within the section. If more than 30 items are available in a category, then a **Show More** link is available. Click this link to display the additional items.

The following categories may be available:

- Communities - Click a community tag to view the Main page of the community.

- Topics - Click a topic tag to view the Topic Details page for the topic.
- Postings - Click a posting tag to view the posting.
- Author - Click an author tag to view the Postings Created page for the author. *See* **Universal Profile: Bio - Postings Created** *on* page 128 *for additional information.*



Universal Profile: Bio - Postings Created

With this enhancement, a new Postings Created page is available within the Universal Profile: Bio.

The Postings Created page displays all of the postings that the author has created that are available to the user who is viewing the page.

This functionality is only available to organizations using New Connect.

To access the Bio - Postings Created page for a user, navigate to the user's Universal Profile page. Then, click the Bio tab. If the About subtab is not selected by default, click the About subtab. Then, click the **View all** link in the Postings Created section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. 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.	Universal Profile

Sort Postings

In the upper-left corner of the Postings table, the sort option allows users to determine the order in which postings are displayed on the page. The following options are available:

- Sort by Latest Reply - This is the default sort option.
- Sort Alphabetically
- Sort by Create Date
- Sort by Type
- Sort by Most Views
- Sort by Most Likes

Follow

When viewing the Postings Created page of another user, users can choose to follow the author by clicking the **FOLLOW** button to the right of the Sort Postings drop-down menu. If you are already following the user, then Followed is displayed. Click the **FOLLOWED** button to unfollow the user.

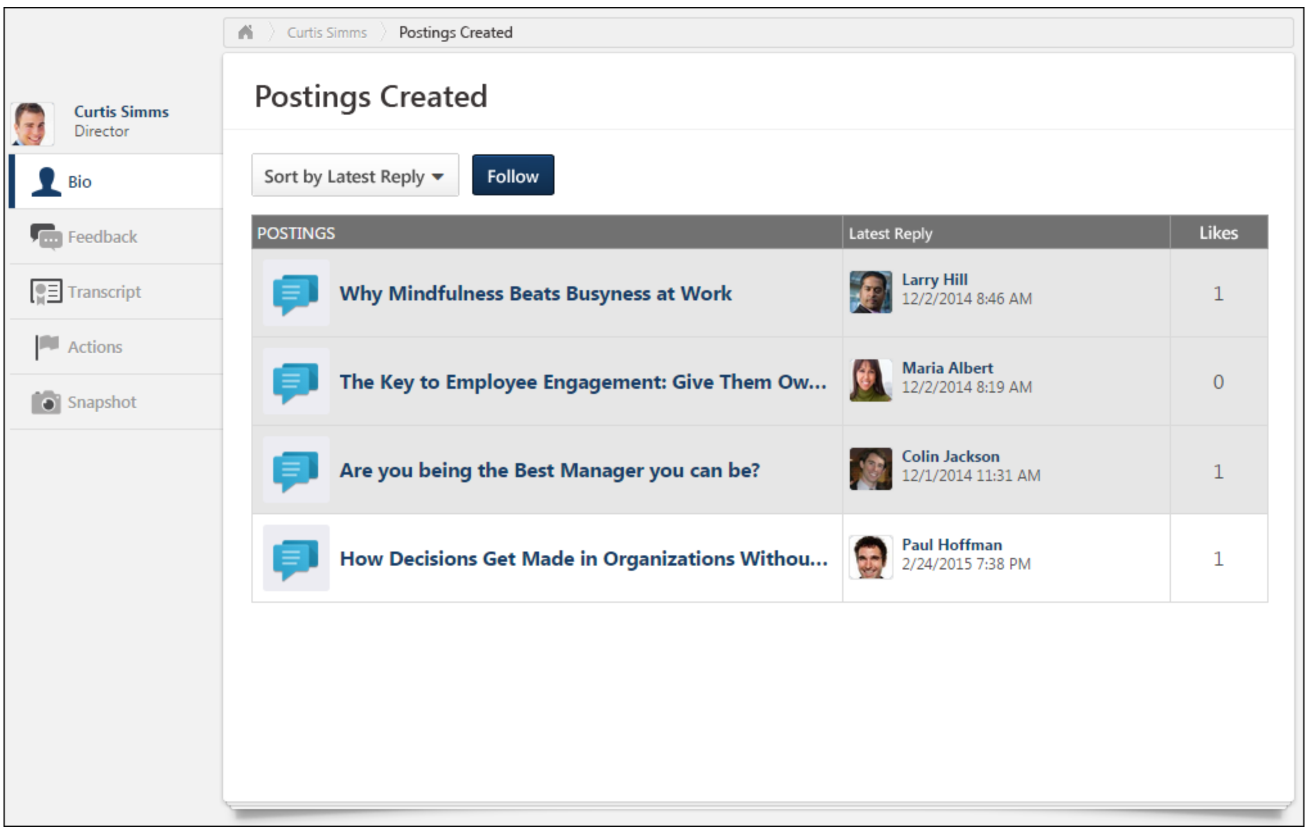
When following a user, you may receive a notification whenever the user creates a new posting. Also, the author is added to your Following section and the Bio - Following page.

Postings Table

A user can only view an author's posting if they are a member of the community that is associated with the posting.

The following information is displayed for each posting that the author has created that is available to the user who is viewing the page:

- Postings - The icon indicates the type of posting. To the right of the icon, the posting title is displayed. Click the posting title to view the posting.
- Latest Reply - This displays the details of the posting's most recent reply, including the posting author's photograph and name and the date and time of the reply. Click the reply author's name or photograph to view their Universal Profile.
- Likes - This displays the number of likes the posting has received.



Live Feed - Followed Content

Whenever a posting from a followed author, topic, or community is created, the activity is displayed in the Live feed as long as this activity update is enabled in Connect Preferences and the posting is available to the user.

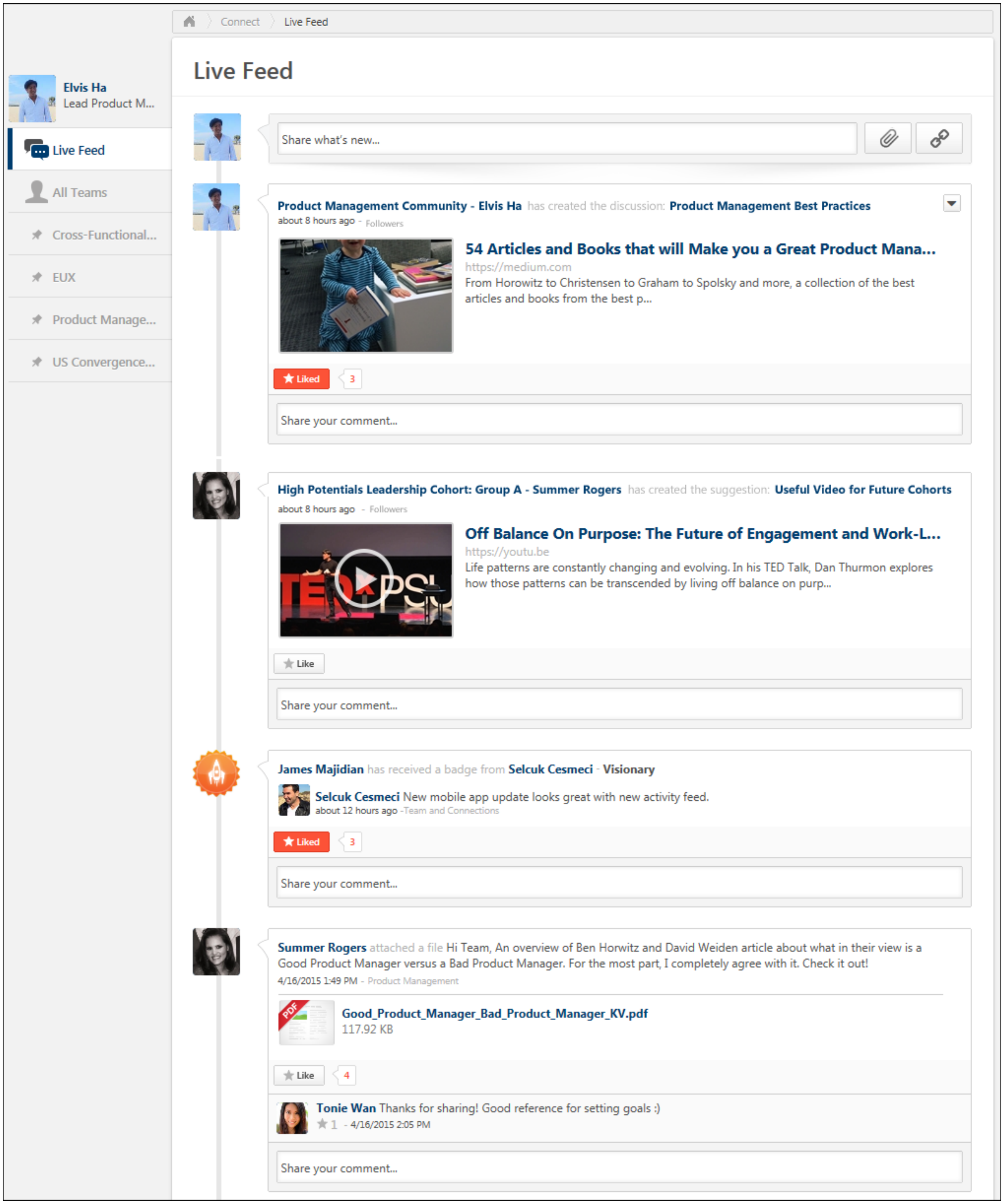
To access the Live Feed, go to **Connect > Live Feed**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View New Connect	Grants ability to view the new Connect pages, including Live Feed, All Teams, Team Overview, Team Feed, Team Tasks, Task Details, and Connections. This permission cannot be constrained.	New Connect

The following information is displayed with each activity update post:

- User Image - An image of the user who created the posting is displayed next to each post. If the user does not have an image in the system, then a generic image is displayed. Click the photograph to open the Universal Profile - Bio page for the user.
- Community Name - The community in which the posting was created is displayed. Click the community name to open the community's Main page.
- User Name - The name of the user who created the posting is displayed to the right of the community name. Click the user's name to open the Universal Profile - Bio page for the user.
- Posting Name - The posting name is displayed. Click the posting name to open the posting.
- Timestamp - A timestamp is displayed with each update post to indicate when the post was made. The timestamp is always displayed in the time zone of the user who is viewing the posting.
- Visibility - The posting's visibility is displayed to the right of the timestamp.
- File or Link Attachment - If the posting has an attachment, then the attachment is displayed.


Connect
Live Feed
Live Feed
Elvis Ha
Lead Product M...
Live Feed
All Teams
Cross-Functional...
EUX
Product Manage...
US Convergence...
Share what's new...
Product Management Community - Elvis Ha has created the discussion: Product Management Best Practices
about 8 hours ago - Followers
54 Articles and Books that will Make you a Great Product Mana...
https://medium.com
From Horowitz to Christensen to Graham to Spolsky and more, a collection of the best articles and books from the best p...
Liked 3
Share your comment...
High Potentials Leadership Cohort: Group A - Summer Rogers has created the suggestion: Useful Video for Future Cohorts
about 8 hours ago - Followers
Off Balance On Purpose: The Future of Engagement and Work-L...
https://youtu.be
Life patterns are constantly changing and evolving. In his TED Talk, Dan Thurmon explores how those patterns can be transcended by living off balance on purp...
Like
Share your comment...
James Majidian has received a badge from Selcuk Cesmeci - Visionary
Selcuk Cesmeci New mobile app update looks great with new activity feed.
about 12 hours ago -Team and Connections
Liked 3
Share your comment...
Summer Rogers attached a file Hi Team, An overview of Ben Horwitz and David Weiden article about what in their view is a Good Product Manager versus a Bad Product Manager. For the most part, I completely agree with it. Check it out!
4/16/2015 1:49 PM - Product Management
Good_Product_Manager_Bad_Product_Manager_KV.pdf
117.92 KB
Like 4
Tonie Wan Thanks for sharing! Good reference for setting goals :)
1 - 4/16/2015 2:05 PM
Share your comment...

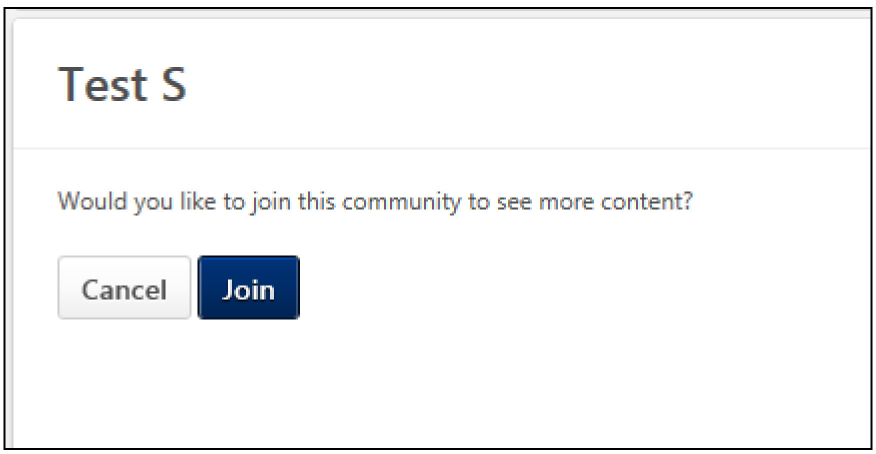
Join Community

Prior to this enhancement, if a user navigated to a topic or posting that belongs to a community of which the user is not a member and the community is available to the user, then the user was directed to a "Restricted Access" page.

With this enhancement, if a user navigates to a topic or posting that belongs to a community of which the user is not a member and the community is available to the user, then the user is given the option to join the community in order to view the topic or posting. This applies to all communities, but does not impact the Knowledge Bank.

- If the user clicks the **JOIN** button, then the user becomes a member of the community and the user is directed to the topic or posting.
- If the user clicks the **CANCEL** button, then the user is directed to a "Restricted Access" page.

As previously implemented, if the user navigates to a topic or posting that belongs to a community that is not available to the user, then the user is directed to a "Restricted Access" page.



Use Case

Trish is a new employee at Acme Co. On one of her first days, she views her manager's Bio: About page to see the types of content her manager is following within Connect. She notices that her manager is following the "Investment Best Practices" topic. When she clicks on the link to view the topic, a message appears, asking her if she wants to join the topic's community in order to see more content. She clicks **JOIN** and then immediately has access to the topic.

Implementation

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

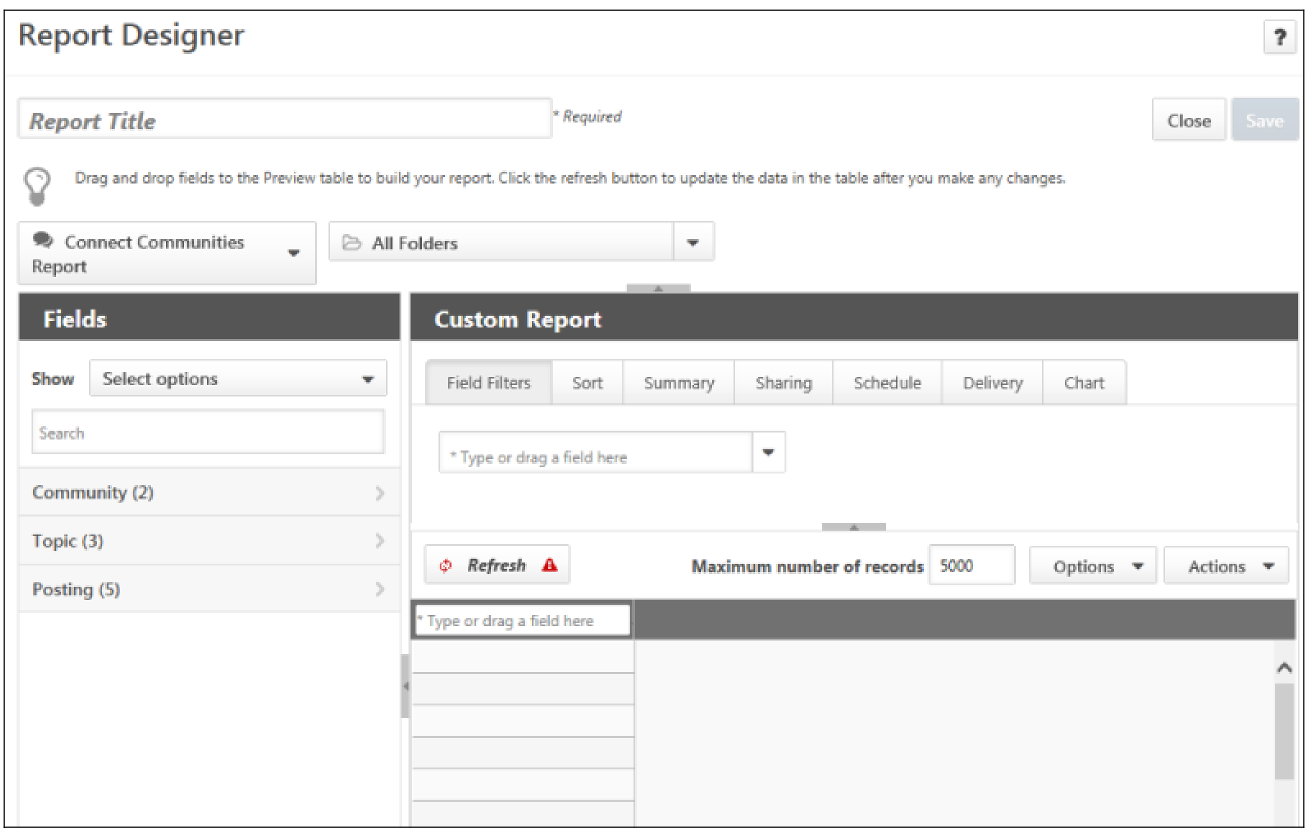
Connect Communities Custom Report

The Connect Communities Report is a new custom report that allows users to report on communities in New Connect and customize these reports in various configurable visual representations.

To create a Connect Communities Report, go to **Reports > Custom Reports**. Then, click **Connect Communities Report** in the **New** drop-down.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Connect Communities Report - Create	Grants access to view, create, and edit the Connect Communities Report in Custom Reports, which gives a way to measure success of communities in connect.	Reports - Analytics
Custom Connect Communities Report - View	Grants access to view the Connect Communities Report in Analytics, which gives a way to measure success of communities in connect.	Reports - Analytics



Available Fields

The Connect Communities Report includes the following field sections:

- Community
- Topic
- Posting

Community

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Community Description	Description of the community.	Text
Community Moderator	Text entered in the Community Moderators field under the Members in a specific community in Connect. Each name displays in a separate row in the report output. The name displays as Last Name, First Name.	Text
Community Title	Title of the community.	Text
Number of Members	Number of replies for a specific posting.	Numeric
Number of Postings	Number of postings for a specific community.	Numeric
Top Community Leaderboard Names	Top leaderboard name(s) for the community. Each name displays on a separate row in the report output. The name displays as Last Name, First Name.	Text
Type of Community	Type of the community. The possible values are Community (Regular), Learning Community, Knowledge Bank, Cohort.	Text

Topic

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Topic Description	Description of the topic.	Text
Topic Expert Name	Expert name(s) of the topic. Each name displays on a separate row in the report output. The name displays as Last Name, First Name.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Topic Moderator Name	Moderator name(s) of the topic. Each name displays on a separate row in the report output. The name displays as Last Name, First Name.	Text
Topic Title	Title of the topic.	Text

Posting

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Author Division	Posting author's division.	Text
Author Location	Posting author's company location. The location displays as City, Country Abbreviation.	Text
Author Name	Posting author's name. The name displays as Last Name, First Name.	Text
Author Position	Posting author's position.	Text
Create Date	Create Date of the posting. The date display as MM/DD/YYYY (00):(00) (AM/PM).	Date
Last Modified Date	Last date of modification of the posting. The date display as MM/DD/YYYY (00):(00) (AM/PM).	Date
Number of Likes	Overall number of likes for a specific posting. **Note:** *For "suggestion" posting types, the number of likes is an aggregate number of upvotes, assigned with a value of +1, and downvotes assigned with a value of -1, given to a posting.*	Numeric
Number of Replies	Number of replies for a specific posting.	Numeric
Number of Views	Number of views for a specific posting.	Numeric
Posting Title	A new field will be added to display the title of the posting.	Text
Posting Type	Type of the posting. The possible values are Discussion, File, Q&A, Suggestion.	Text
Tag:	Indicates whether or not a specific posting is tagged as	Yes/No

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Accepted	Accepted.	
Tag: Answered	Indicates whether or not a specific posting is tagged as Answered.	Yes/No
Tag: Completed	Indicates whether or not a specific posting is tagged as Completed.	Yes/No
Tag: Featured	Indicates whether or not a specific posting is tagged as Featured.	Yes/No

Learning

Adding Instructors in Adobe Connect vILT Sessions

Prior to this enhancement, when an instructor was selected for an Adobe Connect vILT session, the instructor was not designated as a host for the session.

With this enhancement, when an instructor is selected for an Adobe Connect vILT session, the instructor is automatically designated as a host for the Adobe Connect session.

Implementation

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

Browse for Training - Courses for You

Browse for Training - Courses for You

With this enhancement, Browse for Training is taken to the next level with course-specific thumbnail images to communicate the nature of the course. Additionally, Browse for Training can now present learners with content based on their personalized list of interested subjects. These enhancements make the learning experience more collaborative and engaging.

A new Browse for Training landing page is now available. This page displays targeted training that is specific to the user's training interests. This page can also be configured to display featured or suggested training, the most popular training, and the newest training.

Users can configure their preferred training subjects on the Bio: About page.

Click here to view the "Browse for Training - Courses for You" Starter Guide in the Success Center.

Implementation

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

If the Browse for Training landing page is enabled, the Browse for Training navigation link automatically directs users to the Browse for Training landing page. The regular Browse for Training page can be added as an additional navigation link, if needed.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About Preferences - Manage	Enables administrator to access and edit the Bio About 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
Browse for Training Preferences - Manage	Grants ability to configure the Browse for Training features, including which subjects appear in the Browse for Training widget. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

Bio About Preferences - Subjects

With this enhancement, a new Browse for Training landing page is now available, which can display training from a user's favorite subjects. In addition, the Browse for Training page can now be filtered to display training from a user's favorite subjects.

The Bio About Preferences page now enables administrators to configure whether users are able to configure their favorite training subjects on the Universal Profile: Bio - About page.

To access the Bio About Preferences page, go to **Admin > Tools > Core Functions > Universal Profile > Bio About**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About Preferences - Manage	Enables administrator to access and edit the Bio About 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

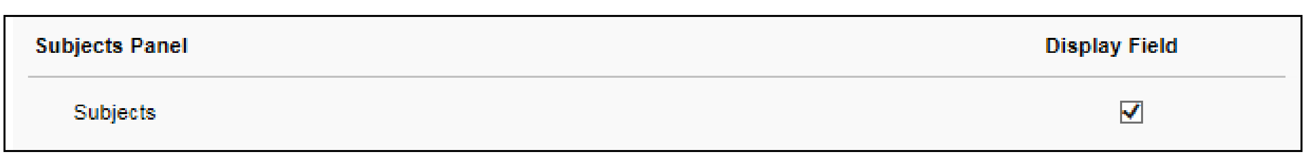
Subjects Panel

This section is only available if the Learning module is enabled.

The Browse for Training landing page can display training from a user's favorite subjects. In addition, the Browse for Training page can be filtered to display training from a user's favorite subjects.

When this option is selected, the following occurs:

- The Subjects section is available on the Universal Profile: Bio - About page, which enables users to configure their favorite training subjects.
- The My Subjects training filter is available on the Browse for Training page, which only displays training from the user's favorite training subjects.
- The My Subjects section on the Browse for Training landing page may be enabled via Browse for Training Preferences. This section displays training that is associated with the user's favorite training subjects.



Browse for Training Preferences

With this enhancement, a new Browse for Training landing page is now available, which enables administrators to display more targeted and interesting content to users. In addition, the Browse for Training page can now display training as tiles or in a list.

The Browse for Training Preferences page is enhanced to support these features.

To access the Browse for Training Preferences page, go to **Admin > Tools > Learning > Learning Preferences**. Then, click the **Browse for Training** link under Learning Preferences.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Browse for Training Preferences - Manage	Grants ability to configure the Browse for Training features, including which subjects appear in the Browse for Training widget. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

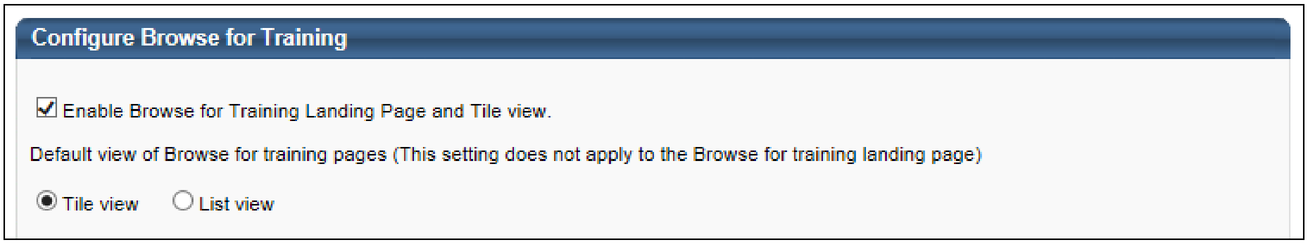
Enable Browse for Training Landing Page and Tile View

This option is unselected by default.

When this option is selected, the Browse for Training landing page is enabled for users. This page enables administrators to display more targeted and interesting content to users. Also, the Tile View option is available on the Browse for Training page, which enables users to view training as tiles or in a list.

- If this option is selected, any Browse for Training navigation links automatically directs users to the Browse for Training landing page. The regular Browse for Training page can be added as an additional navigation link, if needed.
- If this option is unselected and there are links to the Browse for Training landing page, then these links now direct users to the Browse for Training page.

When Tile View is enabled, an additional option is available, which enables administrators to determine the default view for the Browse for Training page, though users are able to change the view at any time. The **Tile view** option is selected by default.



Configure Browse for Training Landing Page

This section enables administrators to configure the order in which the filter options appear in the Training filter on the Browse for Training page. This section also enables administrators to configure what types of content appear on the Browse for Training landing page and the order in which they appear.

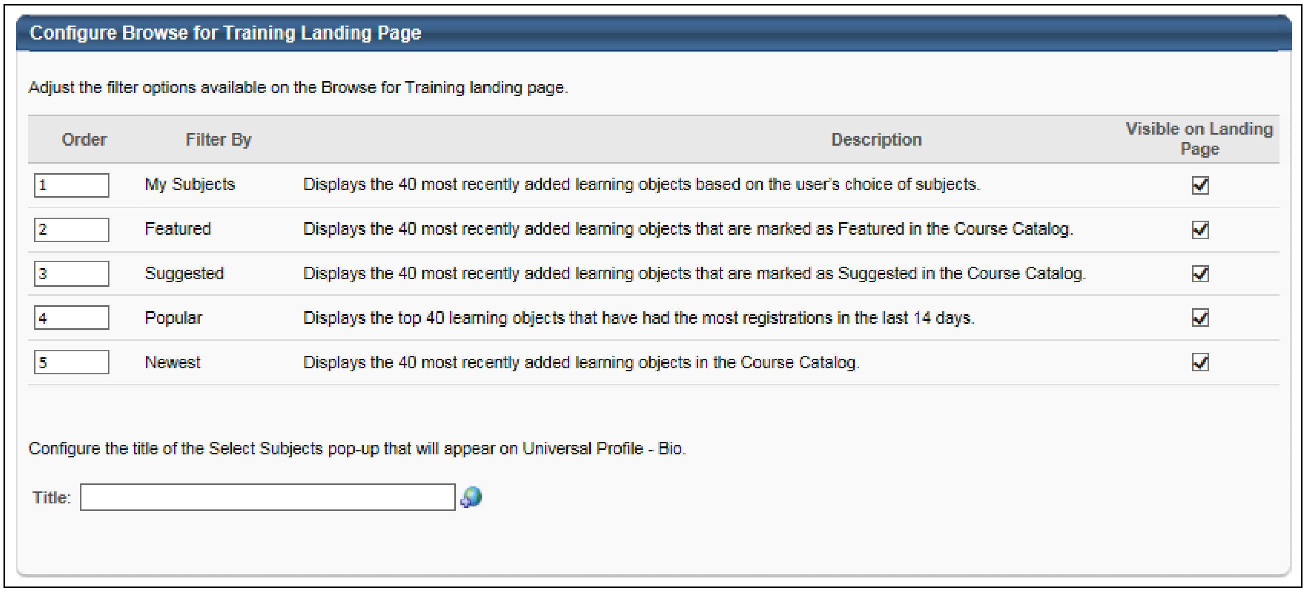
The following filters are available:

- My Subjects - This filter displays training that is associated with the user's favorite training subjects. Users can define their favorite training subjects on the Bio: About page. The most recently created or updated training is displayed first. This filter is only available if the Subjects section is enabled in Bio About Preferences. *See* **Universal Profile: Bio - About** *on* page 155 *for additional information.*
- Featured - This filter displays all featured training that is available to the user. The most recently created or updated training is displayed first. A training item is designated as Featured by administrators via Course Catalog.
- Suggested - This filter displays all suggested training that is available to the user. The most recently created or updated training is displayed first. A training item is designated as Suggested by administrators via Course Catalog. **Note:** *Marking a LO as Suggested is considered an update to the LO.*
- Popular - This filter displays the most popular training items that are available to the user. The system determines popularity by the number of registered users within the previous 14 days.
- Newest - This filter displays the newest training items that are available to the user. The most recently created training is displayed first.

Order - Enter the order in which the sections should appear on the Browse for Training landing page. For example, a filter option with an order value of 1 appears first on the Browse for Training landing page.

Visible on Landing Page - This option is selected by default. If this option is selected, the filter option also appears as a section on the Browse for Training landing page. For example, if the Featured filter option is visible on the landing page, then a Featured section displays training that are marked as featured for the user. All sections that are visible on the landing page appear in the defined order.

Select Subjects Pop-up Title - Users are able to select their favorite training subjects on the Universal Profile - Bio page. Enter the title that should appear in the Select Subjects pop-up in which users select their favorite training subjects. The default value is "Select Subjects." The character limit for this field is 25. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.



Navigation Tabs and Links

With this enhancement, a new Browse for Training landing page is now available.

Upon release, any existing Browse for Training links are linked to the regular Browse for Training page because the Browse for Training landing page is disabled by default.

If the Browse for Training landing page is enabled, the Browse for Training navigation link automatically directs users to the Browse for Training landing page. The regular Browse for Training page can be added as an additional navigation link, if needed.

Within Navigation Tabs and Links, the new Browse for Training landing page is named "Browse for Training Home." The regular Browse for Training page is named "Browse for Training."

To manage Navigation Tabs and Links preferences, go to **Admin > Tools > Core Functions > Core Preferences > Navigation Tabs and Links**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This is an administrator permission.	Core Administration

Course Catalog - Thumbnail Image

With this enhancement, a new Browse for Training landing page is now available, which enables administrators to display more targeted and interesting content to users. In addition, the Browse for Training page can now display training as tiles or in a list.

The General page of the Course Catalog now enables administrators to associate an image with a learning object (LO). This image is a visual representation of the LO, which is displayed to users on the Browse for Training landing page and when viewing the Browse for Training page in tile view.

To access the Course Catalog, go to **Admin > Tools > Learning > Catalog Management > Course Catalog**.

Permissions

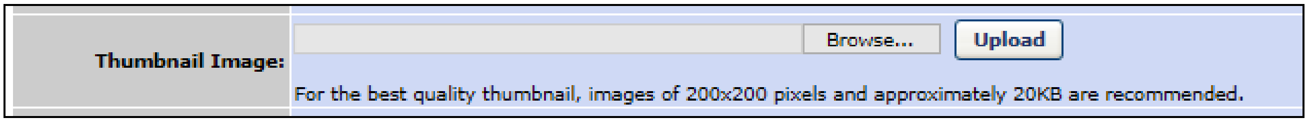
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	Learning - Administration
Course Catalog - View	Grants access to view the learning objects 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, and User's LO Availability. This is an administrator permission.	Learning - Administration

Thumbnail Image - This field enables administrators to associate an image with a LO. This image is a visual representation of the LO, which is displayed to users on the Browse for Training landing page and when viewing the Browse for Training page in tile view. If the training does not have a set image, then a randomly selected default image is displayed.

To upload an image for the LO, click the **BROWSE** button. Then, select the appropriate file and click the **UPLOAD** button.

The recommended dimensions are 200x200 pixels, and the maximum file size is 40 KB. The following image types can be uploaded: bmp, gif, jpg, jpeg, and png.

When editing a material LO, the previous **Image** field is renamed and is now titled **Material Image**.

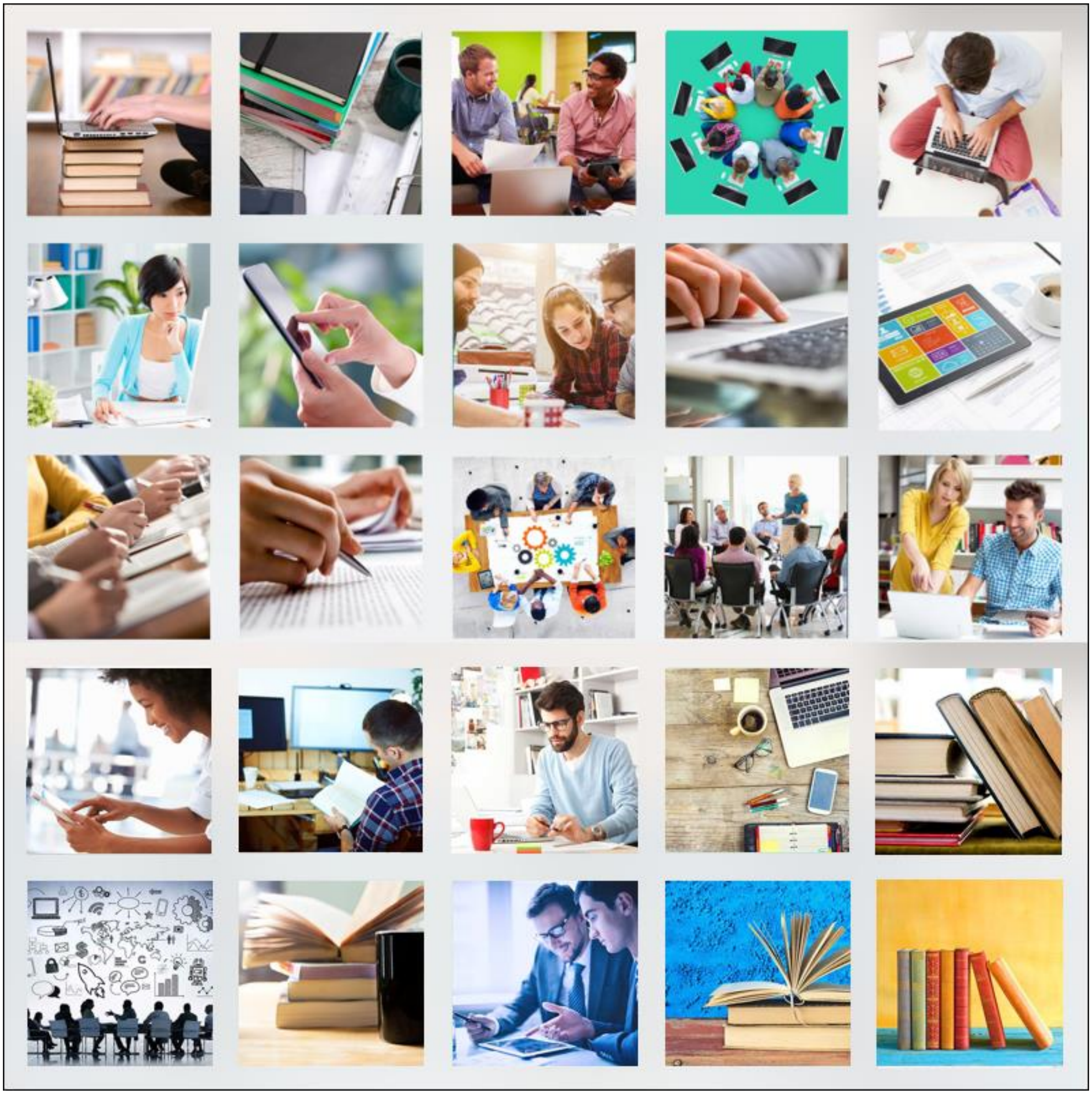


Browse for Training - Default Thumbnail Images

With this enhancement, a new Browse for Training landing page is now available, which enables administrators to display more targeted and interesting content to users. In addition, the Browse for Training page can now display training as tiles or in a list.

On the Browse for Training landing page and the Browse for Training page, a thumbnail image is displayed to represent the training or training type. If the training does not have a set image, then a default image is displayed.

There are 25 available default images, and default images are randomly assigned to learning objects (LOs) regardless of LO type. The following default images are available.



Browse for Training Landing Page

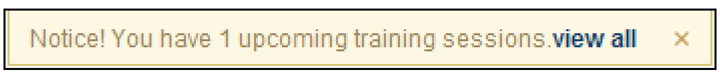
With this enhancement, a new Browse for Training landing page is now available. When the Browse for Training landing page is enabled, the Browse for Training navigation link directs users to the Browse for Training landing page. The regular Browse for Training page can be added as an additional navigation link, if needed.

The Browse for Training landing page displays targeted training that is specific to the user's training interests. This page can also be configured to display featured or suggested training, the most popular training, and the newest training.

To access the Browse for Training landing page, go to **Learning > Browse for Training**.

Upcoming Sessions Notification

When viewing the Browse for Training landing page, if a user is registered for a session that is upcoming, the system displays a notification at the top of the page. Click the **view all** link to navigate to the Events Calendar. *See Events Calendar for additional information.*



Browse for Training Banner

At the top of the Browse for Training landing page, the Browse for Training banner allows organizations to configure an optional HTML banner to market their training. The maximum size of the banner is 960 x 250 pixels. The Browse for Training banner is optional and is configured by the administrator in Browse for Training Preferences.

Browse All

Click the **BROWSE ALL** button to open the Browse for Training page and browse for training using many different filters, such as LO type, location, subject, etc. *See* **Browse for Training Page** *on* page 153 *for additional information.*

Training Details

For each available training item, the following information is displayed:

- Image - An image is displayed to represent the training or training type. If the training does not have a set image, then a randomly selected default image is displayed. Click the image to view the LO Details page.
- Training Type - In the lower-right corner of the image, the training type is displayed.

- Title - Below the image, the training title is displayed. Click the title to view the LO Details page.
- Rating - If ratings are enabled, then the training's rating is displayed. Click the rating to view the Ratings tab of the LO Details page.
- Cost - If pricing is enabled, then the training's price is displayed.

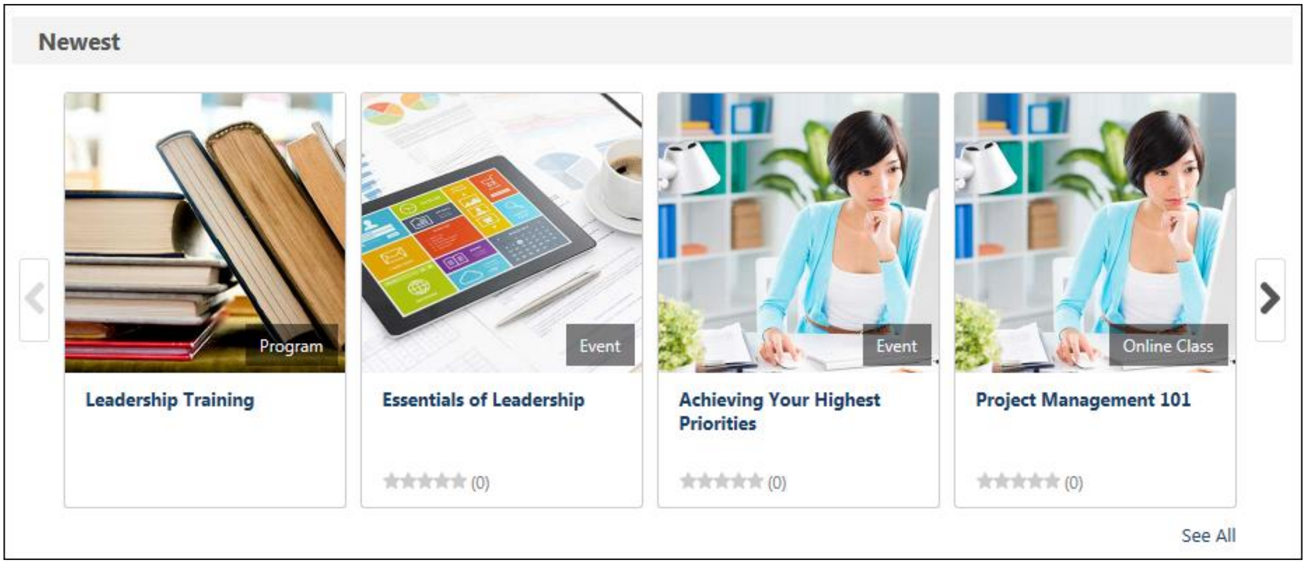
Training Sections

The following training sections may be available if enabled by the administrator in Browse for Training Preferences:

- My Subjects - This section displays training that is associated with the user's favorite training subjects. Users can define their favorite training subjects on the Bio: About page. The most recently created or updated training is displayed first. *See* **Universal Profile: Bio - About** *on* page 155 *for additional information.*
- Featured - This section displays all featured training that is available to the user. The most recently created or updated training is displayed first. A training item is designated as Featured by administrators via Course Catalog.
- Suggested - This section displays all suggested training that is available to the user. The most recently created or updated training is displayed first. A training item is designated as Suggested by administrators via Course Catalog. **Note:** *Marking a LO as Suggested is considered an update to the LO.*
- Popular - This section displays the most popular training items that are available to the user. The system determines popularity by the number of registered users within the previous 14 days.
- Newest - This section displays the newest training items that are available to the user. The most recently created or updated training is displayed first.

Up to four learning objects (LOs) are displayed in a section at once. To view additional LOs in the section, click the arrow to the right of the section. This displays the next four LOs. Up to 40 LOs may be available in each section.

To view all LOs in the training section, click the **See All** link in the lower-right corner of the section. This opens the Browse for Training page with the selected training filter applied.


Newest
Program
Leadership Training
Event
Essentials of Leadership
(0)
Event
Achieving Your Highest Priorities
(0)
Online Class
Project Management 101
(0)
See All

Browse for Training Page

The Browse for Training page is enhanced to include a tile view, which must be enabled via Browse for Training Preferences. This view displays training items more visually as tiles or images. Users can choose to view the page in tile view or in list view. In addition, the Training filter is enhanced to include a My Subjects filter. This filter displays training that is associated with the user's favorite training subjects.

When the Browse for Training landing page is enabled, the Browse for Training navigation link directs users to the Browse for Training landing page. The regular Browse for Training page can be added as an additional navigation link, if needed.

To access the Browse for Training page, go to **Learning > Browse for Training**. If the Browse for Training landing page is enabled, then click the **BROWSE ALL** button on the landing page to access the Browse for Training page.

Change View: Tile or List

The Tile View and List View options are only available if Tile View is enabled by the administrator in Browse for Training Preferences.

In the upper-right corner of the page, users can change the view between Tile View and List View. The selected option appears dark gray. The default view is controlled by the administrator in Browse for Training Preferences.

- Tile View - This view displays training items more visually as tiles or images. Up to three items are displayed in each row.
- List View - This view displays training items more textually in a list format.

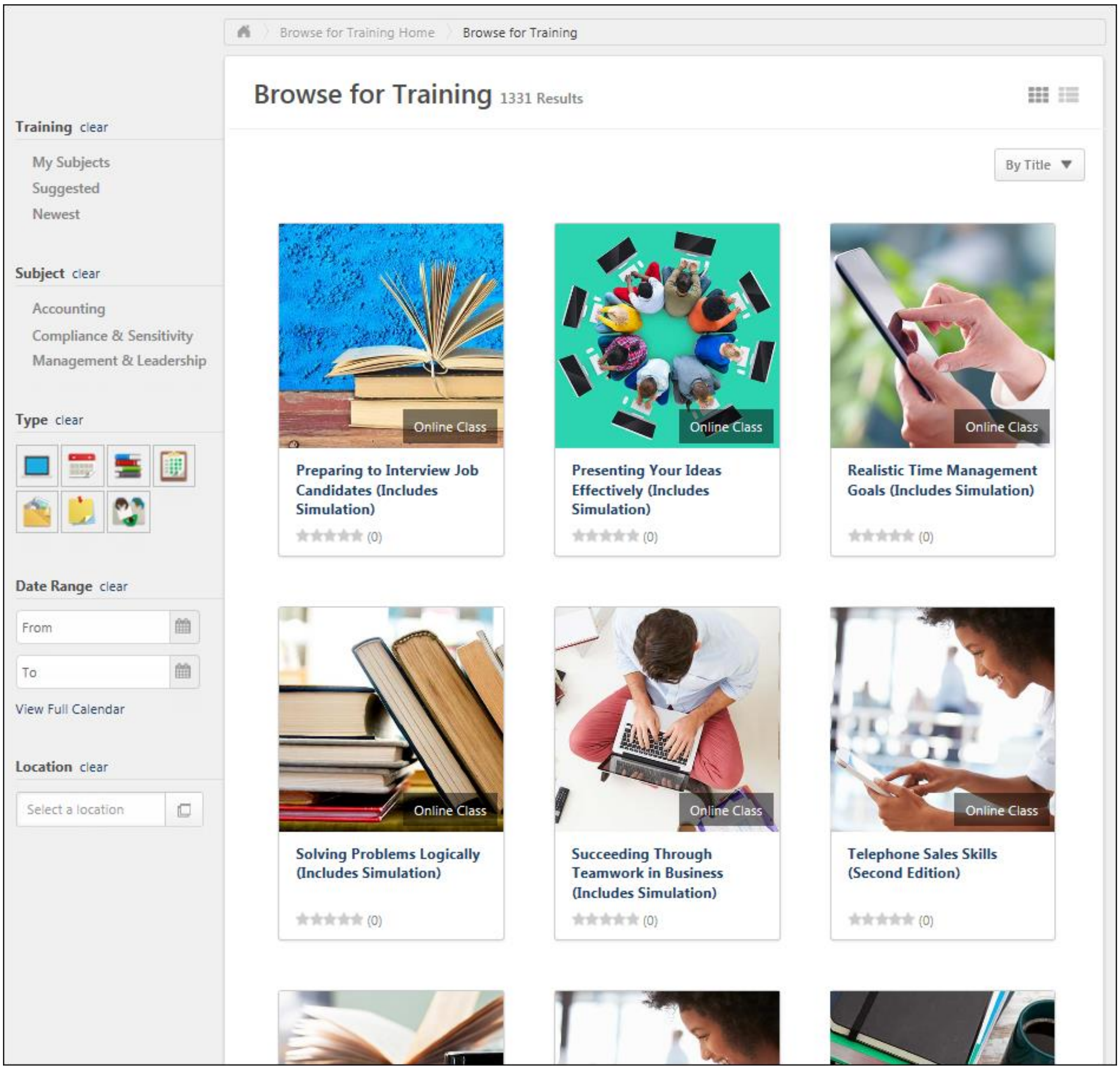
Training Details - Tile View

For each available training item, the following information is displayed:

- Image - An image is displayed to represent the training or training type. If the training does not have a set image, then a default image is displayed. Click the image to view the LO Details page.
- Training Type - In the lower-right corner of the image, the training type is displayed.
- Title - Below the image, the training title is displayed. Click the title to view the LO Details page.
- Rating - If ratings are enabled, then the training's rating is displayed. Click the rating to view the Ratings tab of the LO Details page.
- Cost - If pricing is enabled, then the training's price is displayed.

Training Filter

The training filter is enhanced to include a My Subjects filter option. This option is only available if the Subjects section is enabled in Bio About Preferences. This filter displays training that is associated with the user's favorite training subjects. Users can define their favorite training subjects on the Bio: About page. The most recently created or updated training is displayed first. *See* **Universal Profile: Bio - About** *on* page 155 *for additional information.*



Universal Profile: Bio - About

With this enhancement, a new Browse for Training landing page is now available, which can display training from a user's favorite subjects. In addition, the Browse for Training page can now be filtered to display training from a user's favorite subjects.

If the Subjects section is enabled in Bio About Preferences, this section enables users to configure their favorite training subjects.

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

Permissions

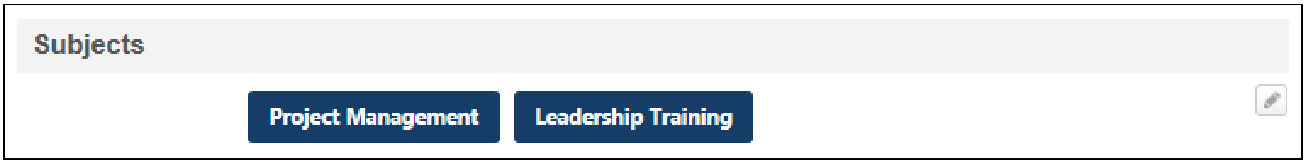
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name 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.	Universal Profile
View Transcript Item	Grants ability to view details of learning objects that appear on the transcript (training record), by clicking on the name of the 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.	Learning - Administration

Subjects

This section only appears on this page if enabled by the administrator. This section displays the user's favorite training subjects. This section is only visible when a user views their Universal Profile. This section is also visible to managers and administrators who have permission to view the user's transcript items.

When a user has selected their favorite training subjects, the user can filter training by their favorite subjects on the Browse for Training page. If enabled, the Browse for Training landing page may display training from the user's favorite subjects.

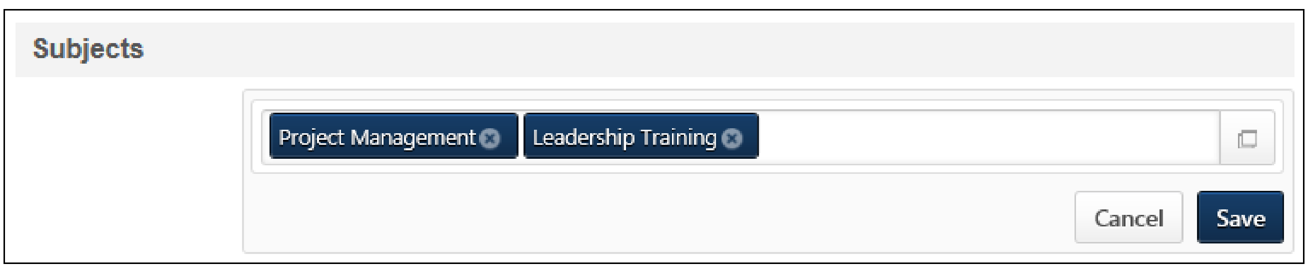
Click a subject tag to open the Global Search page and search for all training associated with the selected subject. This functionality is only available if the user is able to search for training using the Training filter in Global Search.



To edit the Subjects information, click the Edit icon. This option is only available to a user when viewing their Universal Profile.

- To add a subject, click the Select icon. This opens a pop-up in which you can search for and select predefined training subjects. Up to 25 subjects can be selected.
- To remove a subject, click the Remove icon to the right of the subject name.

After editing the Subjects information, click the **SAVE** button to save the changes, or click **CANCEL** to discard any unsaved changes. **Note:** *Only the owner of the page can edit this content.*



Central Material Administration

Central Material Administration

With this enhancement, the administration of material learning objects (LOs) is enhanced. A new Material Administration page enables administrators to create, view, search, and edit materials. Administrators can also create new versions of materials. A new Material Type Administration page enables administrators to create, view, and edit material types. Also, the process of creating and editing a material is expanded to enable administrators to configure availability and emails for the material.

Implementation

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

Security

With this enhancement, the Materials - Add Type permission can no longer be constrained. The permission description will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials - Add Type	Grants ability to add and edit Material learning object types. This permission works in conjunction with the Materials Management permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

With this enhancement, the Materials Management permission is enhanced to grant the ability to view the Material Administration page, create materials, and edit materials. This permission can now be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view and edit. The permission description will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status	Learning - Administration

	from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	

Material Administration

A material is a learning object (LO) type that can be used to manage various types of items maintained in an organization. A material can be a website URL or an uploaded file such as an image, text document, or presentation document. Because a material is a LO, it behaves similar to other LO types.

Prior to this enhancement, the Material Administration page displayed the material types. With this enhancement, the Material Administration page now displays the details of available materials. The material types are now managed on the Material Type Administration page. *See* **Material Type Administration** *on* page 164 *for additional information.*

Prior to this enhancement, administrators created a new material by clicking the Add icon to the right of the material type name. This added a new material to the corresponding material type. With this enhancement, a new **Create a New Material** link is now available. This allows for easier access to creating materials.

To manage materials, go to **Admin > Tools > Learning > Catalog Management > Materials**.

Permissions

With this enhancement, the Materials - Add Type permission can no longer be constrained. The permission description will be updated when this functionality is released.

With this enhancement, the Materials Management permission is enhanced to grant the ability to view the Material Administration page, create materials, and edit materials. This permission can now be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view and edit. The permission description will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials - Add Type	Grants ability to add and edit Material learning object types. This permission works in conjunction with the Materials Management permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the	Learning - Administration

	course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	

Material - Create

To create a material, click the **Create a New Material** link. *See* **Material - Create/Edit - General** *on* page 166 *for additional information.*

Material Types - Manage

To manage material types, click the **Manage Material Types** link. *See* **Material Type Administration** *on* page 164 *for additional information.*

Materials - Search and Filter

The following search options and filters are available above the Materials table:

- Material Title - This field enables administrators to search materials by title. In this field, enter the title of the material for which you are searching, up to 100 characters.
- Material Type - This field enables administrators to filter materials by type, including inactive material types. From the drop-down menu, select the appropriate material type. All material types are listed in alphabetical order.
- Language - If multiple languages are enabled for the portal, this field enables administrators to filter materials by their available languages. From the drop-down menu, select one or more languages.
- Include Inactive - By default, inactive materials are not included in the Materials table, including previous versions of a material. If the most recent version of a material is inactive, then the material is not included, even if previous versions of the material are active. Select this option to include inactive materials in the table. This also applies to previous versions of a material.

Click **SEARCH** to initiate a search with the selected search criteria. Only the materials that match all of the selected search criteria are displayed in the table.

When searching and filtering materials, the **Material Title**, **Material Type**, and **Language** fields and filters apply to all versions of the materials. If any version of a material matches the search and filter criteria, then all versions of the material are displayed in the search results. For example, if a previous version of a material matches the search term, then all versions of the material are displayed in the search results.

Materials Table

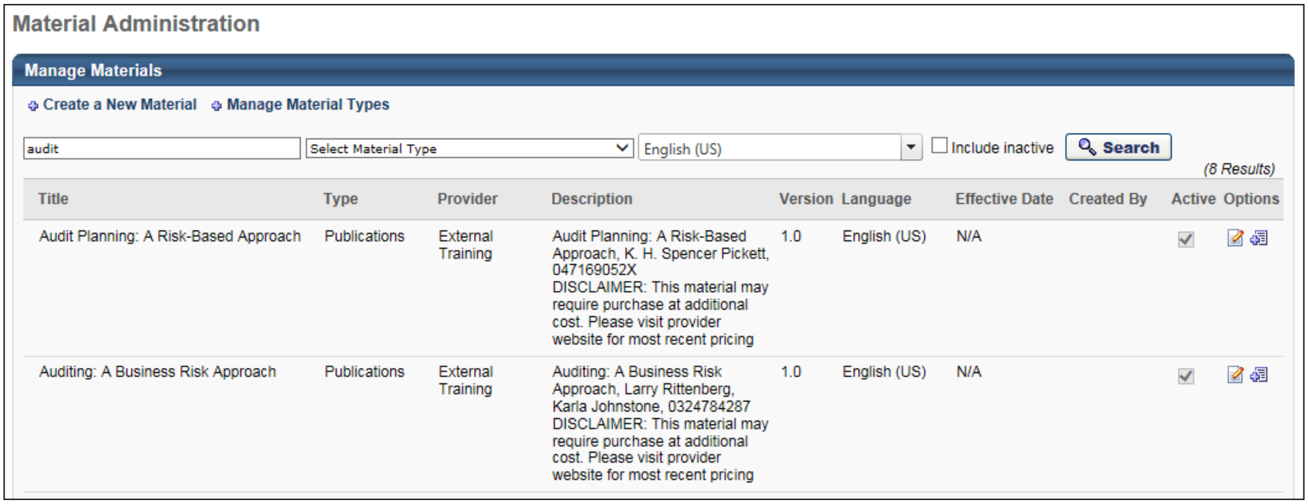
By default, the Materials table is sorted alphabetically by Title. The table can also be sorted by Type, Provider, Effective Date, and Created By. Click the column heading to sort the table using the selected column or to reverse the sort order.

The following information is displayed for materials in the table:

- Expand/Collapse - If there are multiple versions of the material, then a plus icon appears to the left of the material. Click the plus icon to expand the material row and view the details for all versions of the material. Click the minus icon to collapse the material row. The most recent active versions are displayed first.
  - Expired versions appear gray and cannot be edited.
- Title - By default, materials are displayed alphabetically by title.
- Type
- Provider
- Description
- Version
- Language
- Effective Date - This column displays when the version of the material is available for training. If there is no effective date, then "N/A" is displayed.
- Created By
- Active - This column displays the active status of the material. However, the active status cannot be modified from this page. A material's active status can only be modified via the Course Catalog.

The following options may be available in the Options column:

- Edit  - Click this icon to edit the material. This option is available for the current version of all active materials. For inactive materials, this option is only available for the current version. *See* **Material - Create/Edit - General** *on* page 166 *for additional information.*
- Create Version  - This is a new option that is a part of the Materials Versioning enhancement.


Material Administration
Manage Materials
Create a New Material
Manage Material Types
audit
Select Material Type
English (US)
Include inactive
Search
(8 Results)
Title
Type
Provider
Description
Version
Language
Effective Date
Created By
Active
Options
Audit Planning: A Risk-Based Approach
Publications
External Training
Audit Planning: A Risk-Based Approach, K. H. Spencer Pickett, 047169052X DISCLAIMER: This material may require purchase at additional cost. Please visit provider website for most recent pricing
1.0
English (US)
N/A
Auditing: A Business Risk Approach
Publications
External Training
Auditing: A Business Risk Approach, Larry Rittenberg, Karla Johnstone, 0324784287 DISCLAIMER: This material may require purchase at additional cost. Please visit provider website for most recent pricing
1.0
English (US)
N/A

Material Type Administration

Material types are used to categorize material learning objects (LOs). Each material must be associated with a material type.

To manage material types, go to **Admin > Tools > Learning > Catalog Management > Materials** Then, click the **Manage Material Types** link.

Permissions

With this enhancement, the Materials - Add Type permission can no longer be constrained. The permission description will be updated when this functionality is released.

With this enhancement, the Materials Management permission is enhanced to grant the ability to view the Material Administration page, create materials, and edit materials. This permission can now be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view and edit. The permission description will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials - Add Type	Grants ability to add and edit Material learning object types. This permission works in conjunction with the Materials Management permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	Learning - Administration

Material Type - Add

To create a material type, click the **Add New Type** link. A new row appears at the top of the Material Types table. In the **Title** field, enter the materials type name. The character limit for this field is 100. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

After entering the material type title, click the Save icon to save the material type, or click the Cancel icon to discard the material type.

Include Inactive

By default inactive material types are not included in the Material Types table. To include inactive material types, select the **Include inactive** option.

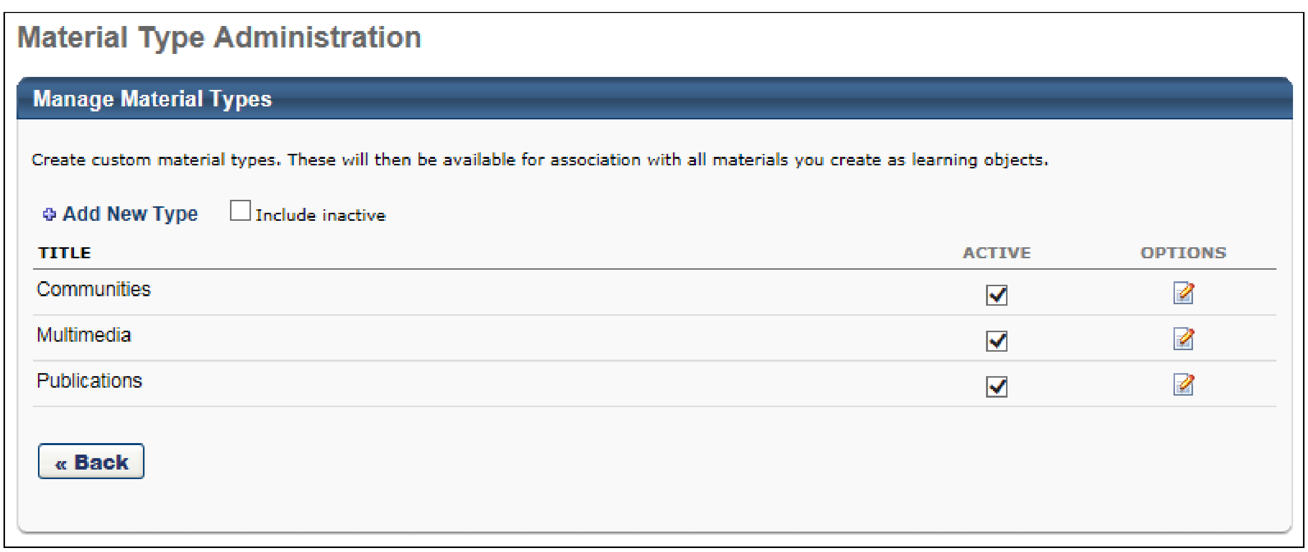
Material Types Table

The following information is displayed for material types in the table:

- Title - Material types are displayed alphabetically by title.
- Active - When this checkbox is selected, the material type is active. When creating a material, only active material types can be selected for the material.

The following option may be available in the Options column:

- Edit - Click this icon to edit the material type title. The **Title** field becomes editable. The character limit for this field is 100. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages. After updating the material type title, click the Save icon to save the changes, or click the Cancel icon to discard the changes.



Material - Create/Edit - General

With this enhancement, a new Create Material wizard is implemented when creating a material. The General step contains the fields that were previously available in the Add Material pop-up window. Administrators can now configure prerequisites and the version details for the material learning object (LO).

Prior to this enhancement, administrators added a material directly to a material type, so the material type was already determined. With this enhancement, administrators select a material type when creating or editing the material.

Prior to this enhancement, when uploading a resource file or when uploading a file as the material source, the maximum file size was 5 MB. With this enhancement, the maximum file size for an uploaded material source is 50 MB.

Prior to this enhancement, when uploading a file as the material source, the system did not support pps, ppsx, or zip files. With this enhancement, pps, ppsx, and zip files can be uploaded as a material source.

To create a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Then, click the **Create a New Material** link.

To edit a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Then, click the Edit icon to the right of the appropriate material.

Permissions

With this enhancement, the Materials Management permission is enhanced to grant the ability to view the Material Administration page, create materials, and edit materials. This permission can now be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view and edit. The permission description will be updated when this functionality is released.

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
LO Attachments -	Grants ability to upload attachments to learning objects. Administrators with this permission are	Learning - Administration

Manage	automatically granted the LO Attachments - View permission. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.	
LO Attachments - View	Grants ability to view the learning object attachments that are set to be available to administrators. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	Learning - Administration

Enter the following information for the material:

- **Title** - Enter a title for the material. The character limit is 500. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **Material Type** - Select the appropriate material type from the drop-down list. This drop-down only includes active material types. Material types can be configured on the Manage Material Types page. **Note:** *This field can now be edited when editing a material.*
- **Provider** - Select the appropriate provider from the drop-down list. **Note:** *This field cannot be edited when editing a material.*
- **Training Hours** - Enter the number of hours and minutes that are required to complete the training.
- **Description** - Enter a description for the material, this field accepts HTML. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

- **Resources** - This section enables administrators to view and manage attachments for the material. The visibility of each attachment can be determined by the administrator. For example, some attachments may be visible to only administrators, while other attachments may be visible to all users. This section is only available for users that have permission to view or manage LO attachments.
- **Keywords** - Enter words to associate with the training. When a user searches for training and enters any of the keywords specified here, the course title will appear in the search results. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **Available Languages** - From the drop-down list, select the languages in which the material is available. The available languages are mainly used for searching purposes and they are independent of the material's default language. At least one language must be selected. At the top of the drop-down list, all selected languages are displayed. The drop-down list only displays the languages that are available to the user. Select the All Languages option to select all available languages.
    - When a language is selected, the material is associated with that language and users can search for the course by associated languages.
- **Default Language** - This displays the default language of the material. If a user views a material in a language that does not have a translation, the information is displayed in the default language for the material. When an administrator creates a material, the default language for the material is the administrator's default language at the time they create the material. **Note:** *This field cannot be edited when editing a material.*
- **Credits** - Enter the number of credits a user receives upon completing the LO. This number must be greater than zero and less than 1000.
- **Material Image** - Select an image to upload if applicable. The image will be visible to the user when viewing the Training Details page for the LO.
- **Material Source** - This section enables administrators to specify the material source. The administrator can either enter a URL or upload a file. **Note:** *This field cannot be edited when editing a material. This field can only be edited when creating a new version of the material.*
    - URL - Select this option to specify a URL as the material source.
    - Upload Material - Select this option to upload a document as the material source. With this enhancement, the maximum file size for an uploaded material is now 50 MB. Also, pps, ppsx, and zip files are now supported in addition to the previously supported file types.
- Custom Fields - Any training custom fields that are enabled for material LOs are available.

Prerequisites

The Prerequisites section enables administrators to set prerequisites for the LO, and the defined prerequisites must be completed by the user before they are able to register for the LO. The status of the training will be Pending Prerequisite until the user completes the prerequisites. It is not required that a LO have prerequisites.

Add New Option

Prerequisite options are the options that a user has in order to satisfy the prerequisite requirement for the LO. All of the LOs within an option must be completed in order to satisfy the option.

- If the LO only has one option, then that option must be completed by the user before the user is able to register for the LO.
- If the LO has multiple options, then the user is only required to complete one of the options before the user is able to register for the LO.

Click the **Add New Option** link to add a new prerequisite option for the LO. This opens the Select Training pop-up in which the administrator can select the LOs that belong in the option. Multiple LOs can be selected. The selected LOs appear in alphabetical order within the new option in the Prerequisites table. **Note:** *The same LO can be added to multiple options if the LO is a requirement for multiple options.*

The following information is displayed for each item in the Prerequisites table:

- Name - This displays the name of the option or LO within the option. Options are automatically numbered in the order in which they appear in the table (e.g., Option 1, Option 2). When an option is deleted, the remaining option names are updated to reflect the new option order.
- Type - This displays the LO type for each LO in the option.

A maximum of 10 prerequisite options can be defined for a LO. Once 10 options have been added, the **Add New Option** link is no longer available until an option is deleted.

A maximum of 50 LOs can be added to an option. Once 50 LOs have been added, the Add Training icon is no longer available until a LO is deleted from the option.

Delete Option

To delete a prerequisite option, click the Delete icon in the Options column for the appropriate option. This also removes all of the LOs within the option. Options are automatically numbered in the order in which they appear in the table (e.g., Option 1, Option 2). When an option is deleted, the remaining option names are updated to reflect the new option order.

Add LO to Existing Option

To add an additional LO to an existing prerequisite option, click the Add Training icon in the Options column for the appropriate option. This opens the Select Training pop-up in which the administrator can select the additional LOs that belong in the option. Multiple LOs can be selected. The selected LOs appear in alphabetical order within the option in the Prerequisites table.

A maximum of 50 LOs can be added to an option. Once 50 LOs have been added, the Add Training icon is no longer available until a LO is deleted from the option.

Delete LO within Existing Option

To remove a LO from an existing prerequisite option, click the Delete icon in the Options column for the appropriate LO. If all LOs are deleted from an option, the option is also deleted after the changes are saved.

Version Details

This section enables administrators to view and set the version details for the material.

When creating a material, only the **Start Date** and **End Date** fields are available.

- **Start Date** - This date determines the first date on which the version of the material is active. This date cannot be a date in the past. This field is optional. When editing a material, this field cannot be edited.
- **End Date** - This displays the last date on which the version of the material is active. Following the end date, the material expires. This value is automatically set when a newer version of the material is created. When this occurs, the End Date of the previous version is automatically set as the Start Date of the newer version.

Next or Cancel

Click **NEXT** to proceed to the Availability step. *See* **Material - Create/Edit - Availability** *on* page 172 *for additional information.*

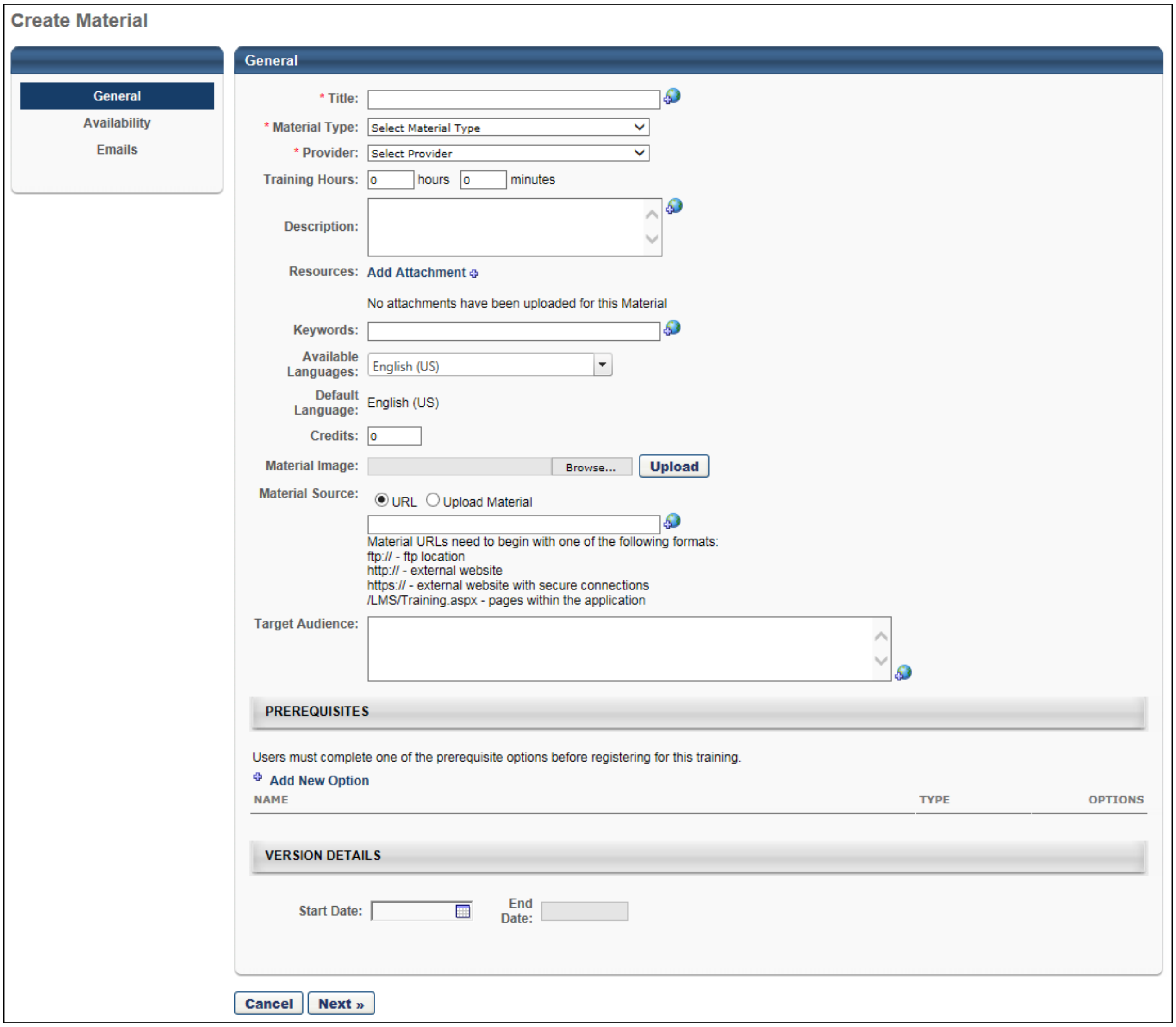
Click **CANCEL** to cancel the material creation process and return to the Manage Materials page. This discards the new material. *See* **Material Administration** *on* page 160 *for additional information.*

Modification History

The *Modification History* section displays a record of each time the material is modified. This includes the modification description, the name of the user who modified the material, and when the modification occurred.

If the material has multiple versions, then this section displays the modification history for all versions of the material.

This section is only available when editing a material and when creating a new version of a material.



Material - Create/Edit - Availability

With this enhancement, a new Create Material wizard is implemented when creating a material. The Availability step enables administrators to set the availability for the material while creating or editing the material. Prior to this enhancement, administrators could only configure the availability for a material via the Course Catalog. Following this enhancement, administrators still have the ability to configure the availability for a material learning object via the Course Catalog.

The availability for a learning object (LO) determines which users have access to the learning object. If no availability is set for a LO, then no users have access to the LO.

To create a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Then, click the **Create a New Material** link.

To edit a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Then, click the Edit icon to the right of the appropriate material.

Permissions

With this enhancement, the Materials Management permission is enhanced to grant the ability to view the Material Administration page, create materials, and edit materials. This permission can now be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view and edit. The permission description will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	Learning - Administration

Set Availability

From the drop-down menu, select the appropriate OU type. Then, click the Select icon to select the specific OU.

If necessary, click the **Create New Group** link to create a new group for the availability. *See Group - Create for additional information.*

Include Subordinates

Check **Include Subordinate** to make the LO available to the selected OU, as well as is its subordinate OUs.

Pre-approved

Check **Pre-Approved** to exempt these OUs from requiring approval for the LO.

Register Upon Approval

Check **Register Upon Approval** to automatically register the selected users in the training, thereby allowing them to bypass having to register for the LO on their Transcript.

Training Request Form

From the drop-down, select a Training Form to be attached to this LO, if appropriate.

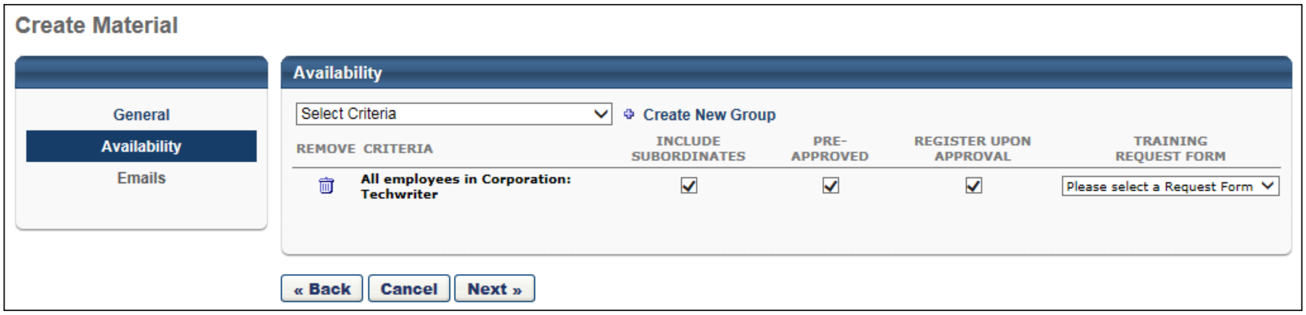
- When attaching a Training Request Form to a LO, only users who have not yet requested this LO will see the form.
- The Training Request Form will display for users when they request the LO. If proxy enrolling users into the LO, the user can access the Training Request Form from the Training Details page for the LO in their transcript.
- The user can modify the Training Request Form after the initial submission by accessing it from the Training Details page in their transcript.

Next, Cancel, or Back

Click **NEXT** to proceed to the Emails step. *See* **Material - Create/Edit - Emails** *on* page 175 *for additional information.*

Click **CANCEL** to cancel the material creation process and return to the Manage Materials page. This discards the new material. *See* **Material Administration** *on* page 160 *for additional information.*

Click **BACK** to return to the General step. *See* **Material - Create/Edit - General** *on* page 166 *for additional information.*


Create Material
General
Availability
Emails
Availability
Select Criteria
Create New Group
REMOVE
CRITERIA
INCLUDE SUBORDINATES
PRE-APPROVED
REGISTER UPON APPROVAL
TRAINING REQUEST FORM
All employees in Corporation: Techwriter
Please select a Request Form
« Back
Cancel
Next »

Material - Create/Edit - Emails

With this enhancement, a new Create Material wizard is implemented when creating a material. The Emails step enables administrators to configure and customize the emails for the material learning object (LO).

Prior to this enhancement, emails could not be configured when a material was created or edited. However, emails could be configured for the material via Course Catalog, but until this occurred, there was no email settings for the material. With this enhancement, the Create/Edit Material wizard includes an Emails step. When editing an existing material that has not been configured via Course Catalog, the email setting defaults to No Emails. This matches the previous system behavior.

To create a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Then, click the **Create a New Material** link.

To edit a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Then, click the Edit icon to the right of the appropriate material.

Permissions

With this enhancement, the Materials Management permission is enhanced to grant the ability to view the Material Administration page, create materials, and edit materials. This permission can now be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view and edit. The permission description will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	Learning - Administration

The following email options are available:

System Defaults

Select this option to use the system default emails. When this option is selected, the following occurs:

- All emails related to material LOs will be triggered based on the active email templates in Email Administration.
- Changes made to the email templates in Email Administration will apply to emails that have not yet been queued.

See Email Administration for additional information.

Custom Emails

Select this option to customize emails for this material. All emails related to this material will be sent based on the custom templates that are configured in this section.

- The Custom Emails section will not display until this option is selected. Then, these emails may be edited, added, or deleted as desired.
- Changes made to the custom emails on this page will only apply to emails that have not yet been queued.
- If an email trigger is not available in the Custom Emails section, it will still be sent from Email Administration if it is configured to do so.
- Both active and inactive templates are available to be customized. However, only the active email templates will be triggered in relation to this material.
- Future custom emails that are configured for the material will be triggered appropriately based on the settings and templates created within the Custom Email section.

No Emails

Select this option to disable emails for the material.

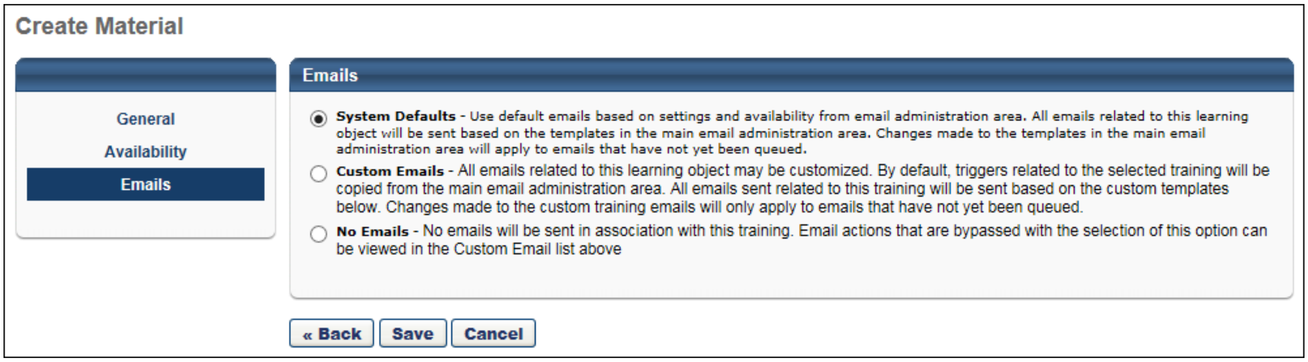
For email troubleshooting, see the Email Troubleshooting Guide in the OnDemand Support folder. *See Email Troubleshooting Guide.*

Back, Save, or Cancel

Click **BACK** to return to the Availability step. *See* **Material - Create/Edit - Availability** *on* page 172 *for additional information.*

Click **SAVE** to save the material and return to the Manage Materials page. *See* **Material Administration** *on* page 160 *for additional information.*

Click **CANCEL** to cancel the material creation process and return to the Manage Materials page. This discards the new material. *See* **Material Administration** *on* page 160 *for additional information.*


Create Material
General
Availability
Emails
Emails
System Defaults - Use default emails based on settings and availability from email administration area. All emails related to this learning object will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued.
Custom Emails - All emails related to this learning object may be customized. By default, triggers related to the selected training will be copied from the main email administration area. All emails sent related to this training will be sent based on the custom templates below. Changes made to the custom training emails will only apply to emails that have not yet been queued.
No Emails - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above
« Back
Save
Cancel

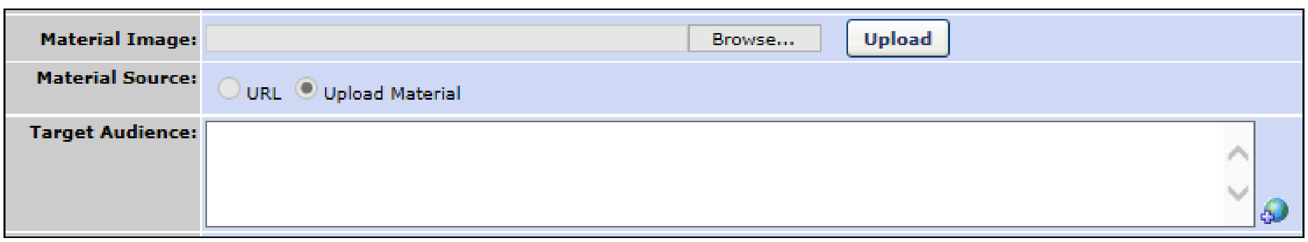
Course Catalog - General - Material Source

When editing a material in the Course Catalog, the **Material Source** field on the General page can no longer be edited. The source for a material can only be modified when creating a new version of the material via Material Administration.

To access the Course Catalog, go to **Admin > Tools > Learning > Catalog Management > Course Catalog**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	Learning - Administration



Material Email Tags

With this enhancement, two new email tags are available for materials:

- MATERIAL.START.DATE - This tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. This tag is available for the Updated Training email trigger.
- MATERIAL.END.DATE - This tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. This tag is available for the Updated Training email trigger.

Collaborative Learning - Mark Cohort as Inactive

Collaborative Learning - Mark Cohort as Inactive

Prior to this enhancement, both active and inactive cohorts appeared on the Manage Cohorts page. Also, both active and inactive cohort communities appeared for users on the All Communities page.

With this enhancement, inactive cohorts are automatically hidden on the Manage Cohorts page, and administrators have the option to view inactive cohorts. Administrators can easily inactivate cohorts directly from the Manage Cohorts page. Inactive cohort communities will be hidden for all cohort members and on the All Communities page.

Implementation

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

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Social Learning Cohorts - Edit	Grants ability to access the Manage Cohorts page and to edit existing cohort learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Social Learning Cohorts - Manage	Grants ability to access the Manage Cohorts page and to view, create, and edit cohort learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Manage Cohorts - Active Column

With this enhancement, an Active column is now available on the Manage Cohorts page for each program. This option enables administrators to mark a cohort as inactive from the Manage Cohorts page. Also, inactive cohorts are hidden by default, and administrators can also choose to view inactive cohorts on the Manage Cohorts page.

To manage cohorts for a program, go to **Admin > Tools > Learning > Catalog Management > Programs and Cohorts**. Then, click the View Cohorts icon in the Options column for the appropriate program.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Social Learning Cohorts - Edit	Grants ability to access the Manage Cohorts page and to edit existing cohort learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Social Learning Cohorts - Manage	Grants ability to access the Manage Cohorts page and to view, create, and edit cohort learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Include Inactive - By default, only active cohorts are displayed in the table. Select this option to include inactive cohorts in the table.

Active - This option is selected by default. When this option is not selected, the cohort is inactive.

- When a cohort is inactive, the cohort LO is not available to users, the cohort community is hidden from all cohort members and the All Communities page, and any links to the cohort community will display an Access Denied page. If the cohort is made active, the cohort community is available again.
- If the cohort community has a shared topic, then the cohort cannot be made inactive. The shared topics must first be unshared from the cohort community before it can be made inactive.

Manage Cohorts - Leadership Training

Create New Cohort ☐ Include inactive (4 Results)

Cohort Name	Start Date	End Date	Enrollment	Status	Active	Options
Leadership Training	3/15/2015 - 10:00 AM PST	4/1/2015 - 9:55 AM PST	0 of 0	Approved	☑	
Leadership Training	5/1/2015 - 12:00 AM PST	5/29/2015 - 11:55 PM PST	0 of 0	Completed	☑	
Leadership Training	6/1/2015 - 12:00 AM PST	7/3/2015 - 11:55 PM PST	5 of 30	Approved	☑	
Leadership Training	4/22/2015 - 12:00 AM PST	9/30/2015 - 11:55 PM PST	0 of 30	Approved	☑	

Create/Edit Cohort - General

If the cohort community has a shared topic, then the cohort cannot be made inactive. The shared topics must first be unshared from the cohort community before it can be made inactive.

To create a cohort, go to **Admin > Tools > Learning > Catalog Management > Programs and Cohorts**. Then, click the View Cohorts icon in the Options column for the appropriate program. Then, click the **Create New Cohort** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Social Learning Cohorts - Edit	Grants ability to access the Manage Cohorts page and to edit existing cohort learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Social Learning Cohorts - Manage	Grants ability to access the Manage Cohorts page and to view, create, and edit cohort learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Program LO Details Page

If a cohort is made inactive, it does not appear to users on the program's Learning Object (LO) Details page.

All Communities

If a cohort is made inactive, it does not appear to users on the All Communities page.

Transcript

If a user has a cohort on their transcript and the cohort is made inactive, then the cohort appears inactive on the Transcript page. Users are still able to view the Training Details page for the cohort.

Course Catalog - Evaluations Tab Save Enhancement

Prior to this enhancement, when editing a learning object (LO) in the Course Catalog, any modifications on the Evaluations tab were automatically saved when the administrator navigated to another tab.

With this enhancement, when editing a LO in the Course Catalog, any modifications on the Evaluations tab are not saved until the administrator intentionally saves the changes by clicking the **SAVE** button.

Implementation

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

Create Materials Web Service (REST)

With this enhancement, a new Create Material LOs web service is now available. This web service enables administrators to create material learning objects (LOs) via REST Web Services. This facilitates the creation of bulk material LOs.

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

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
Material ID	String	This is required. This is the unique identifier for the material. The character limit is 200.
Material Title	String	This is required. This displays the name of the LO in the Course Catalog. The character limit is 1000.
Material Description	String	This is optional. This is the material description. The character limit is 2000.
File Name	String	This is optional. The character limit is 200.
URL	String	This is optional. The character limit is 200.
Provider	String	This is required. This must be a valid provider within the system. The character limit is 200.
Material Type	Enum	This is required. This must be a valid material type within the system.
Created By	String	This is optional. If provided, this must be a valid User ID within the system.
Training Hours	Time	This is optional. If provided, this must be in the following format: HH:MM:SS
Language	Enum	This is optional. If provided, this must be a valid language code.
Keywords	String	This is optional. The character limit is 2000.
Subjects	String	This is optional. If provided, this must be valid subjects within the system.
Skills	String	This is optional. The character limit is 200.
Competencies	String	This is optional. The character limit is 200.
Prerequisites	String	This is optional. The character limit is 200.

DATA FIELD	TYPE	DESCRIPTION
Pre-Work	String	This is optional. The character limit is 200.
Post-Work	String	This is optional. The character limit is 200.
Availability > Type	Enum	AllUsers, OUAvailability, UserAvailability
Availability > Include Subordinates	Boolean	This is optional. True or False.
Availability > Pre-approved	Boolean	This is optional. True or False.
Availability > Register Upon Approval	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 or User Availability.
Availability > Sub Type	String	OU Type Name. This is required if Availability > Type is set to OU Availability.
Active	Boolean	This is optional. True or False. This must be set to True in order to have the material be active in Course Catalog.
Custom Field Service Item > Tag	String	This is optional. The character limit is 100.
Custom Field Service Item > Value	String	This is optional. The character limit is 4000.

Implementation

If you have purchased Web Services usage, but need access to this specific one, please contact CSOD via a GPS case to enable.

If you have not purchased Web Services at all, please contact Sales or Client Executive to purchase.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials Management	Grants ability to view the Material Administration page, create materials, and edit	Learning - Administration

	materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	

Custom Transaction Fields Usability Enhancements

Custom Transaction Fields Usability Enhancements Overview

With this enhancement, an OU (organizational unit) Field type is added to the **Type** option when configuring Transaction custom fields. This field type enables administrators to include an OU picker to the field.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
My Account - Manage	Allow users to view and modify their preferences on the My Account screen. The user must have this permission to access My Account. This permission cannot be constrained. This is an end user permission.	Core
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

Order History Details - View	Grants access to 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, and the details of each item purchased. This permission cannot be constrained. This is an end user permission.	eCommerce
Shopping Cart Preferences - Manage	Grants ability to configure shopping cart preferences, which allows the administrator configure aspects of the shopping cart page to be viewed by users making shopping cart purchases. This permission can be constrained by OU and User's OU. This is an administrator permission.	eCommerce - Administration
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
Transaction Manager - Manage	Grants ability to access the Manage Transaction page and also create and edit transactions. On the Order History Details page, the administrator can edit the order status, adjust prices, issue refunds, or enter comments. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration
Transaction Manager - View	Grants ability to view the Manage Transaction page where the administrator can review the transactions that meet their permission constraints. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration

Create Custom Transaction Fields

With this enhancement, an OU (organizational unit) Field type is added to the **Type** option when configuring Transaction custom fields. In addition, an OU Type section is added, which enables administrators to create an OU selection drop-down field.

To access custom Transaction fields, go to **Admin > Tools > Core Functions > Custom Field Administration**. Then, click the Add Field icon in the Fields panel header on the Transaction tab.

Permissions

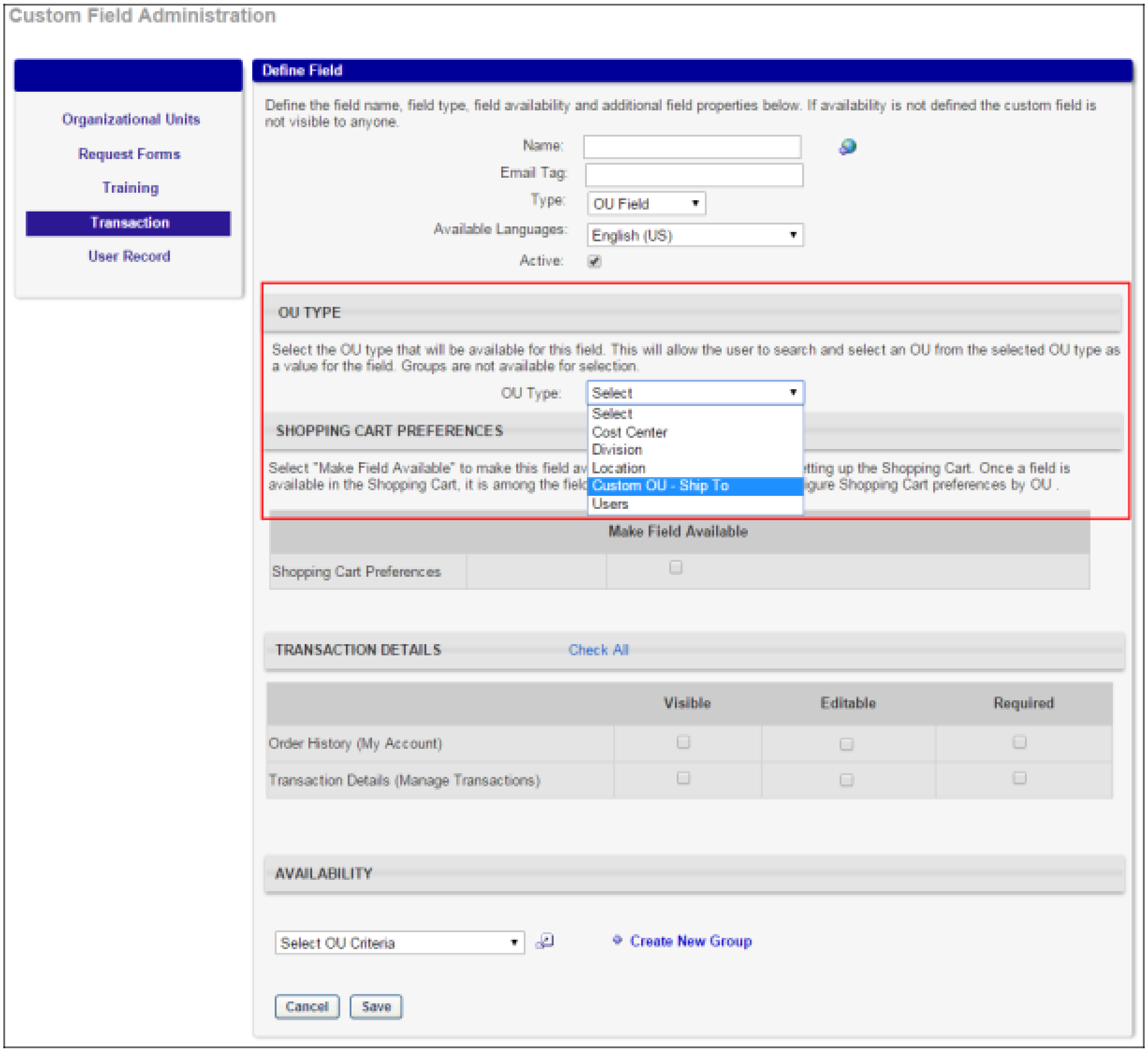
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Transaction Custom Fields - Manage	Grants ability to create and edit custom fields to be used with transactions. This permission cannot be constrained. This is an administrator permission.	eCommerce - Administration

OU Field

An OU Field option is added to the **Type** field. This option defines the Transaction custom field as an OU type field and enables the OU Type section to display.

OU Type Section

In the OU Type section, select the OU type that you would like users to be able to select from when completing the field. The drop-down includes standard and custom OUs. When users complete the field, they will be able to open the Select OU pop-up and select an available OU from the list.


Custom Field Administration
Organizational Units
Request Forms
Training
Transaction
User Record
Define Field
Define the field name, field type, field availability and additional field properties below. If availability is not defined the custom field is not visible to anyone.
Name:
Email Tag:
Type:
OU Field
Available Languages:
English (US)
Active:
OU TYPE
Select the OU type that will be available for this field. This will allow the user to search and select an OU from the selected OU type as a value for the field. Groups are not available for selection.
OU Type:
Select
Select
Cost Center
Division
Location
Custom OU - Ship To
Users
SHOPPING CART PREFERENCES
Make Field Available
Shopping Cart Preferences
TRANSACTION DETAILS
Check All
Visible
Editable
Required
Order History (My Account)
Transaction Details (Manage Transactions)
AVAILABILITY
Select OU Criteria
Create New Group
Cancel
Save

Emails Custom Transaction Fields

With this enhancement, administrators can create Transaction custom fields that include an organizational unit (OU) selector. As with existing functionality for Transaction custom fields, if an email tag is defined for the field, then the tag is available to include in the email. The tags are prefaced with "CUSTOMTRANSACTION."

List of Email Tags

Tags

Below are fields you can enter into the Message Subject or Body. When the email is sent, Cornerstone will replace these fields with actual information. The tags must be entered exactly as they are listed and are case sensitive.

TAG NAME	TAG DESCRIPTION
ACTION.DATE	Date that the action took place which triggers email.
CART.OWNER.FIRST.NAME	First name of the shopping cart owner.
CART.OWNER.LAST.NAME	Last name of the shopping cart owner
CART.RECEIPT.LIST.HTML	HTML List of items purchased in a shopping cart transaction
CART.RECEIPT.LIST.TEXT	Text list of all items purchased in a shopping cart transaction
CART.TRANSACTION.DATE	Transaction date of a shopping cart transaction
CART.TRANSACTION.ID	Transaction Id of a shopping cart purchase.
CART.TRANSACTION.STATUS	Status of a shopping cart transaction.
CUSTOMTRANSACTION.PURCHASE.ORDER.OU	Purchase Order OU
PURCHASE.ACTOR.FIRST.NAME	First name of the purchase actor in a shopping cart purchase.
PURCHASE.ACTOR.LAST.NAME	Last name of the purchase actor in a shopping cart purchase.
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

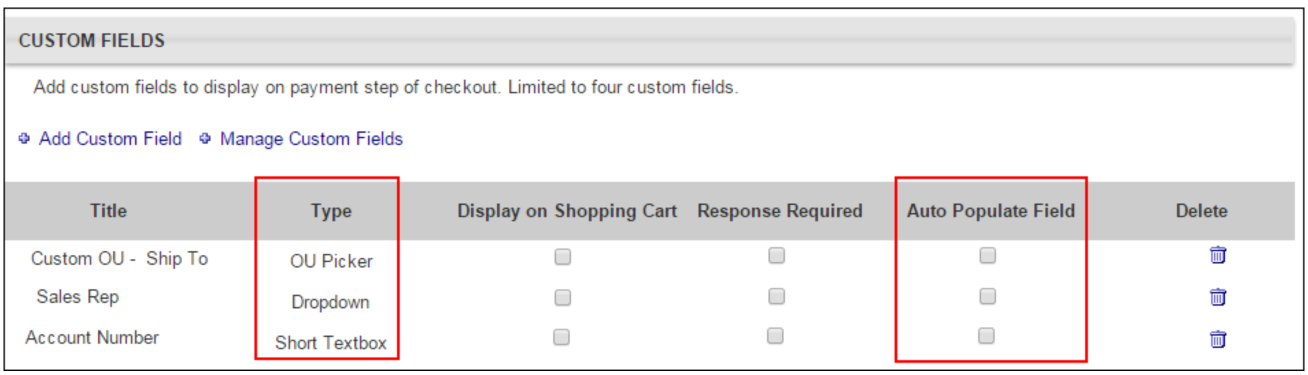
Shopping Cart Preferences

With this enhancement, a Type column and an Auto Populate Field column are added to the Custom Fields section in Shopping Cart Preferences.

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	Grants ability to configure shopping cart preferences, which allows the administrator configure aspects of the shopping cart page to be viewed by users making shopping cart purchases. This permission can be constrained by OU and User's OU. This is an administrator permission.	eCommerce - Administration



Type Column

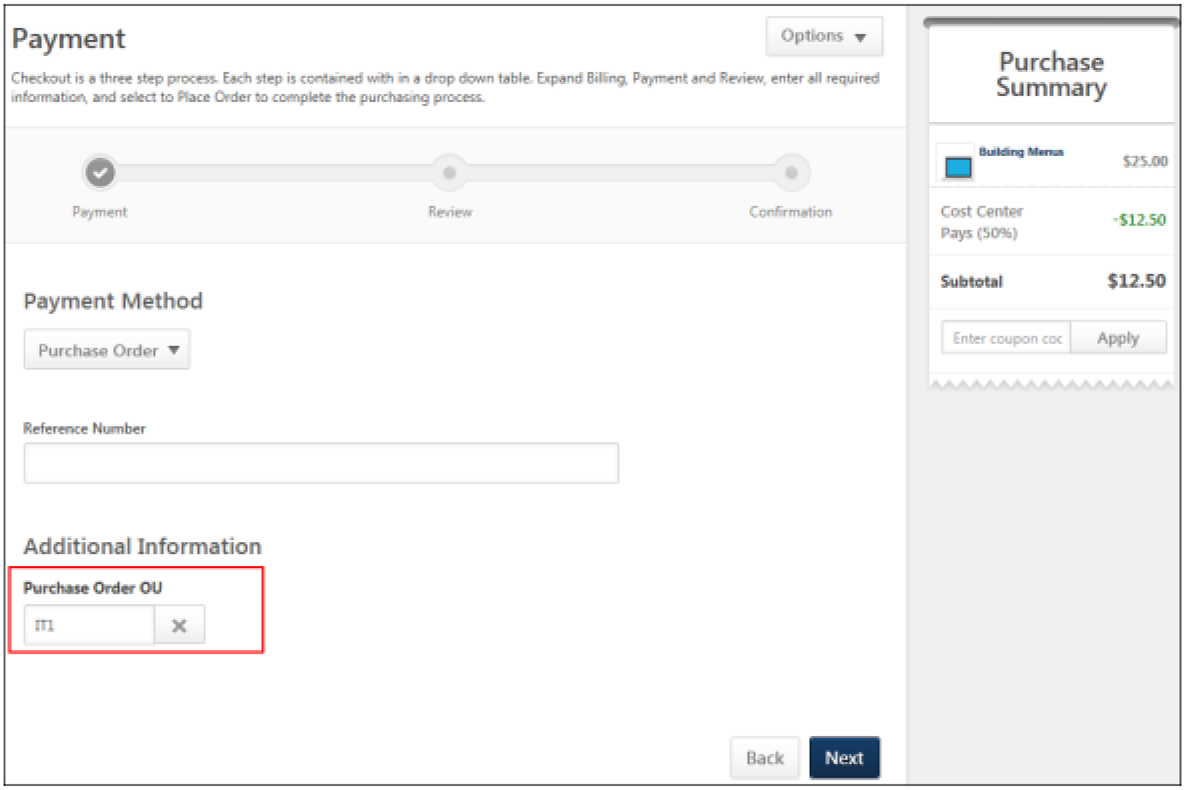
This column displays the type of field defined for the custom Transaction field.

Auto Populate Field Column

This field is read-only for all custom field types except OU Type. When the box is checked, the OU Type custom field on the Payment page of the shopping cart is auto-populated with the value for the OU that is on the user record.

Shopping Cart - Payment Step

With this enhancement, administrators can create Transaction custom fields that include an organizational unit (OU) selector. The fields display in the Additional Information section on the Payment step of the shopping cart. The OU for the field may be automatically populated, if configured by the administrator when defining the custom field. The OU can be changed by selecting a different OU from Select OU pop-up.



My Account - Order Details

With this enhancement, administrators can create Transaction custom fields that include an organizational unit (OU) selector. The fields display on the Order Information section of the Order Details page in My Account. The OU for the field may be automatically populated, if configured by the administrator when defining the custom field. If the field is editable, then the OU can be changed by selecting a different OU from Select OU pop-up.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
Order History Details - View	Grants access to 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, and the details of each item purchased. This permission cannot be constrained. This is an end user permission.	eCommerce

Manage Transactions - Order History Details

With this enhancement, administrators can create Transaction custom fields that include an organizational unit (OU) selector. The fields display on the Order Information section of the Order History Details page in Manage Transactions. The OU for the field may be automatically populated, if configured by the administrator when defining the custom field. If the field is editable, then the OU can be changed by selecting a different OU from Select OU pop-up.

In addition, administrators with permission to manage transactions can edit the invoice reference number on transactions that were created with custom payment types. Specifically, the payment types are Contract and CustomPO.

Permissions

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

Enhanced GetDetails Web Service

With this enhancement, the GetDetails web service is enhanced to include the following:

- Available Languages - The web service response now includes the languages in which the learning object (LO) is available.

Implementation

This Web Service is automatically available to all portals that have purchased it.

If you have purchased Web Services usage, but need access to this specific one, please contact CSOD via a GPS case to enable.

If you have not purchased Web Services at all, please contact Sales or Client Executive to purchase.

Enhanced TranscriptAndTask Web Service

With this enhancement, the TranscriptAndTask web service is enhanced to include the following:

- Training Hours for LOs within a curriculum - The web service response now includes a training hours value for LOs that are within a curriculum on the user's transcript.

Implementation

This Web Service is automatically available to all portals that have purchased it.

If you have purchased Web Services usage, but need access to this specific one, please contact CSOD via a GPS case to enable.

If you have not purchased Web Services at all, please contact Sales or Client Executive to purchase.

Enhanced WebEx vILT SSO

Enhanced WebEx vILT SSO

With the July 2015 release, Cornerstone's existing WebEx integration was enhanced to allow organizations take advantage of WebEx's SAML SSO functionality. With this functionality Cornerstone no longer needs to store passwords for instructors to launch or create meetings within the integration. However, this WebEx SSO functionality only supported Cornerstone as the SSO provider for the WebEx portal.

With this enhancement, the WebEx vILT SSO functionality is enhanced to include WebEx SSO Partner Delegated Authentication (PDA). This enables organizations to use their own SSO provider or have no SSO provider for their WebEx portal.

Considerations

The WebEx SSO (PDA) functionality only follows the "Launch Meeting as Instructor" workflow and does not support the creation of meetings or instructors.

Migration is not supported. WebEx SSO (PDA) only works for sessions that are created after the configuration. Sessions created prior to SSO (PDA) setup still require the integration to use instructor passwords.

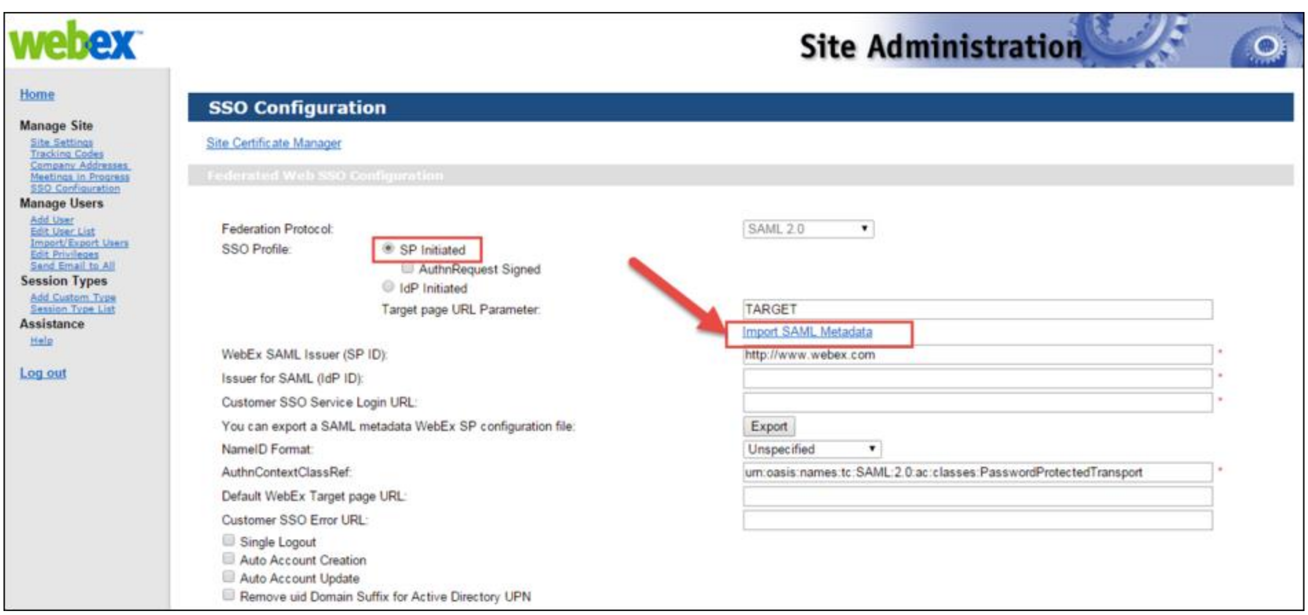
Implementation

This functionality is disabled by default. Contact Sales, Client Executive, or Client Success Manager to enable via a paid Technical Project across environments.

WebEx Support Site

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

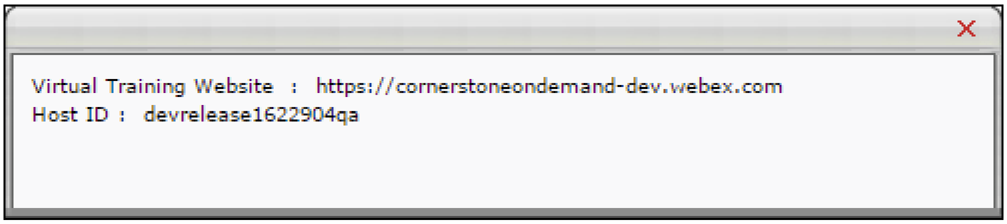
After SSO is enabled by WebEx, organizations must have the SAML metadata imported to their WebEx support site. This can be done via the SSO Configuration page within the WebEx support site.



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.



Materials Versioning

Material Versioning Overview

Prior to this enhancement, organizations were not able to version a material, which prevented administrators from updating significant details of the material, including the material source. In order to create a new version of a material, administrators had to create a new material for each version and use custom fields to track version numbers.

With this enhancement, materials now support versioning. As materials need to be updated, administrators can manage incremental versions of materials. Administrators can also choose to assign a reversioned material to users who have the material on their transcript, including users who have completed the material. Material versions can have an effective date so that two versions of a material can be accessed at the same time. An automated workflow updates curricula that contain a reversioned material.

Click here to view the "Material Versioning" Guide in the Success Center.

With the November 13, 2015 patch release, if an organization decides to opt out of material versioning, then the following changes are made to the system behavior:

- Administrators with the Materials Management permission can edit the Material Source via the Course Catalog and when editing a material. When material versioning is enabled, this can only be done when creating a new version of a material.
- Administrators with the Materials Management permission can change the active status of a material via the **Active** checkbox on the Material Administration page. When material versioning is enabled, a material's Active status can only be changed via the Course Catalog.
- The **Start Date** and **End Date** fields in the *Version Details* section do not appear when creating or editing a material. When material versioning is enabled, these fields are always visible when creating or editing a material.

Use Case - Two Versions on User's Transcript

Sarah is an administrator, and she is responsible for all compliance training at ACME Inc. On August 15, 2015, Sarah receives an email from the Chief Compliance Officer informing her that a new factory procedure for 2016 is available. All employees working in the factory should be able to start being trained on September 1, 2015, as the new procedure will be effective on January 1, 2016. The same factory procedure for 2015 should also be available until December 31, 2015.

1. Sarah creates a new version of the Factory Procedure for 2016 using the new material versioning functionality.

2. Sarah uses the Append option because she wants two materials to be available on users' transcripts at the same time.
3. Sarah also adds a Start Date of January 1, 2016 for the new procedure.
4. Sarah assigns the new version to all employees at ACME Inc. who have the previous version on their transcript.
5. The Factory Procedure for 2015 will be automatically deactivated when the Factory Procedure for 2016 starts.

John is working in the factory at ACME Inc.

1. John sees the 2015 and the 2016 version of the Factory Procedure on his transcript.
2. John can access both versions of the procedure from September 1, 2015 until January 1, 2016. On January 1, 2016, only the 2016 version is available.

Use Case - One Version on User's Transcript

David is an administrator, and he is responsible for all management training at ACME Inc. On August 15, 2015, David receives a call from the Legal Manager informing him that a new anti-harassment policy is available for the State of California, and it is immediately applicable. All managers working in California should be assigned the new version of the policy, and the previous version is obsolete.

1. David creates a new version of the Anti-Harassment Policy using the new material versioning functionality.
2. David uses the Replace option because he wants only the new version of the material to be available on users' transcripts.
3. David adds a Start Date of August 15, 2015 for the new policy.
4. David assigns the new version to all managers in California at ACME Inc.
5. The previous version of the Anti-Harassment Policy is deactivated when the new version is created.

Sam is working in California as a manager at ACME Inc.

1. Before August 15, 2015, Sam can access the previous version of the Anti-Harassment Policy.
2. On August 15, 2015, Sam can only access the new version of the Anti-Harassment Policy. The previous version is automatically made inactive on his transcript.

Use Case - Accessing Version Assignment Details

Jean is an auditor at ACME Inc. On February 14, 2016, Jean meets the Compliance Training Manager and wants to access the completion information for the Factory Procedures material.

1. Jean randomly selects 50 users who are working at ACME Inc.
2. The Compliance Training Manager shows Jean that the learning management system tracks all completion of the Factory Procedures material since 2015 when the material was made mandatory by the FDA.
3. The Compliance Training Manager searches for each of the 50 users and accesses the Assignment and Versions History information on each user's transcript.
4. Jean asks the Compliance Training Manager to print the PDF of the 50 users' Training Version Details for his file.

Considerations

A maximum of two versions can be active at the same time in Material Administration. If there are two active versions of a material and an administrator attempts to create a new version of the material, then the administrator must first deactivate one of the active versions.

When a new version of a material is created, the following considerations apply:

- The pricing from the previous version is not automatically copied to the new version. Administrators must configure pricing for the new version in Course Catalog.
- The training equivalencies are not automatically copied to the new version. Administrators must configure training equivalencies for the new version in Course Catalog.
- Any certifications or development plans that contain a previous version of the material are not impacted.
- The number of remaining licenses for the material is not impacted.
- Any prerequisites, pre-work, or post work associated with the material are not automatically copied to the new version.
- If a material is a prerequisite, pre-work, or post work for another LO, then the new version is automatically set as the prerequisite, pre-work, or post work for the LO.
- If a material is included within the structure of a cohort, then the cohort structure is not impacted by the new version of the material. That is, the old version of the material remains associated with the cohort.

Implementation

The availability of this functionality is controlled by a backend setting, which is enabled by default.

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

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Material Version - Manage	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.	Learning - Administration

The constraints on the Curricula Version - Manage permission determine for which users the administrator can assign a new version of a curriculum when reversioning a material that is contained within a curriculum. This permission description will be updated when the functionality is released.

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. The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning a material that is contained within a curriculum. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Learning - Administration

The following existing permissions apply 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	Learning - Administration

	Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	
Course Catalog - View	Grants access to view the learning objects 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, and User's LO Availability. This is an administrator permission.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	Learning - Administration

Material Administration - Create Version Option

On the Material Administration page, administrators with the appropriate permissions are able to create a new version of an existing material. A material can only have two active versions at the same time.

To manage materials, go to **Admin > Tools > Learning > Catalog Management > Materials**.

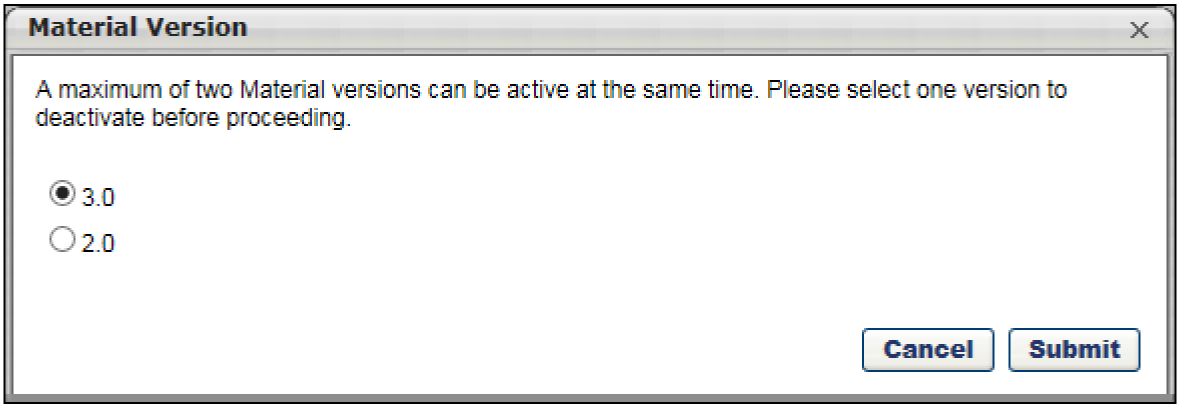
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Material Version - Manage	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	Learning - Administration

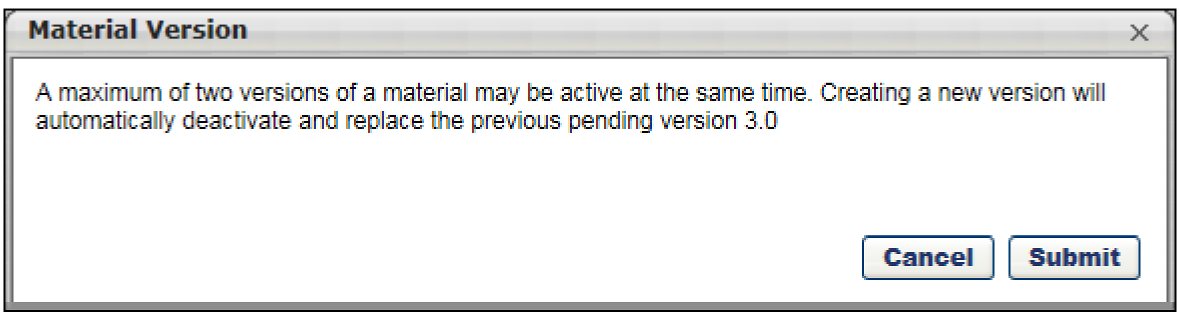
In the Options column, the following option may be available:

- Create Version - This option creates a new version of the material. This option is only available for the latest version of the material. Also, this option is only available if material versioning is enabled and if the administrator has permission to manage material versions. A material can only have two active versions at the same time. If an administrator attempts to create a new version of a material that already has two active versions, then a pop-up opens to warn the administrator.
    - If both active versions are effective, then the administrator is given the option to deactivate one version prior to creating a new version. From

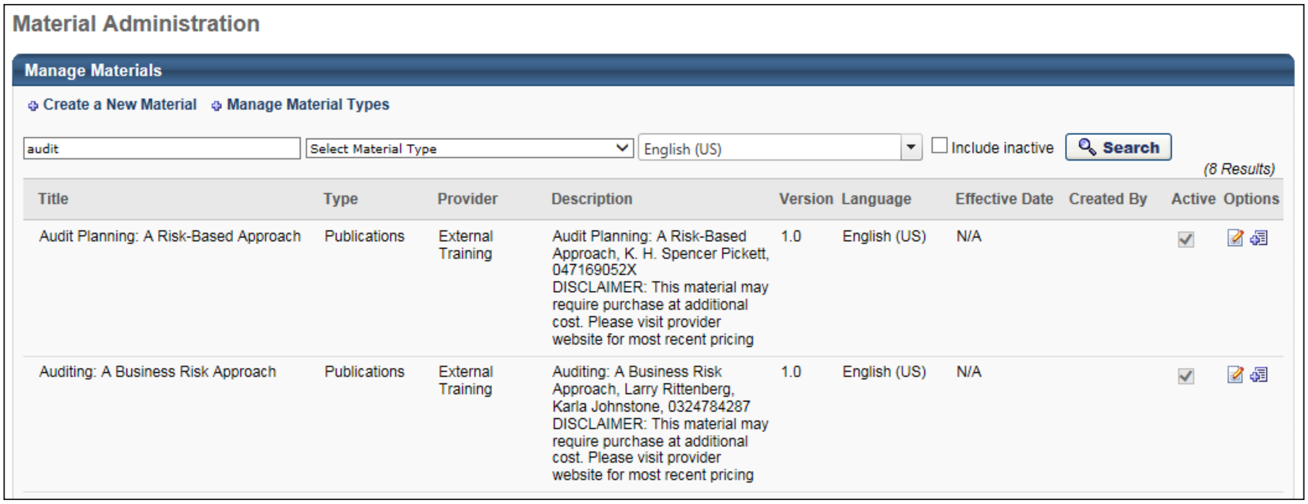
the pop-up, select the version to deactivate and click **SUBMIT**. Or, click **CANCEL** to cancel the creation action.



- If one active version is effective and the other active version is pending activation, then the administrator is given the option to deactivate the pending version prior to creating a new version. From the pop-up, click **SUBMIT** to deactivate the pending version. Or, click **CANCEL** to cancel the creation action.



With the November 13, 2015 patch release, if an organization decides to opt out of material versioning, then administrators with the Materials Management permission can change the active status of a material via the **Active** checkbox on the Material Administration page. When material versioning is enabled, a material's Active status can only be changed via the Course Catalog.


Material Administration
Manage Materials
Create a New Material
Manage Material Types
audit
Select Material Type
English (US)
Include inactive
Search
(8 Results)
Title
Type
Provider
Description
Version
Language
Effective Date
Created By
Active
Options
Audit Planning: A Risk-Based Approach
Publications
External Training
Audit Planning: A Risk-Based Approach, K. H. Spencer Pickett, 047169052X DISCLAIMER: This material may require purchase at additional cost. Please visit provider website for most recent pricing
1.0
English (US)
N/A
Auditing: A Business Risk Approach
Publications
External Training
Auditing: A Business Risk Approach, Larry Rittenberg, Karla Johnstone, 0324784287 DISCLAIMER: This material may require purchase at additional cost. Please visit provider website for most recent pricing
1.0
English (US)
N/A

Material - Create Version - General

When creating a new version of a material, the General page is enhanced to enable administrators to configure the versioning settings for the new version.

To create a new version of a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Next to the material, click the Create Version icon.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	Learning - Administration
LO Attachments - Manage	Grants ability to upload attachments to learning objects. Administrators with this permission are automatically granted the LO Attachments - View permission. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
LO Attachments - View	Grants ability to view the learning object attachments that are set to be available to administrators. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Material Version - Manage	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit	Learning - Administration

	materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	

Version Preference - Select whether the new version of the material replaces or appends the previous version. Once this value is set for a material, the value is applied to all previous and future versions of the material and this value can no longer be changed for any version of the material. **Availability Note:** *This option is not available when creating a material. When editing a material, this option is visible and read-only if there is more than one version of the material. When creating a new version of a material, this option can be edited.*

- Replace - When this option is selected, only one version of the material can be active at the same time. This means that only one version can appear on a user's transcript. If the user has a material on their transcript and they request a new version of that material, then the new version replaces the old version on their transcript. When a new version is created, the new version replaces the previous version based on the **Effective Date** setting. When this occurs, the previous version becomes Expired, and the new version replaces it on the user's transcript.
- Append - When this option is selected, multiple versions of the material can be active at the same time. This means that multiple versions can appear on a user's transcript. If the user has a material on their transcript and they request a new version of that material, then the new version and the old version both appear on the user's transcript. When a new version is created, the new version becomes active based on the **Effective Date** setting. When this occurs, the previous version becomes Inactive on the user's transcript, and the new version is also available.

Effective Date - Select when the new material version is effective. This determines when users are able to register for or be assigned the new material version. This date cannot be a date in the past. **Availability Note:** *This option is not available when creating a material. When editing a material, this option is only visible if there is a newer version of the material that is not yet effective. When creating a new version of a material, this option can be edited.*

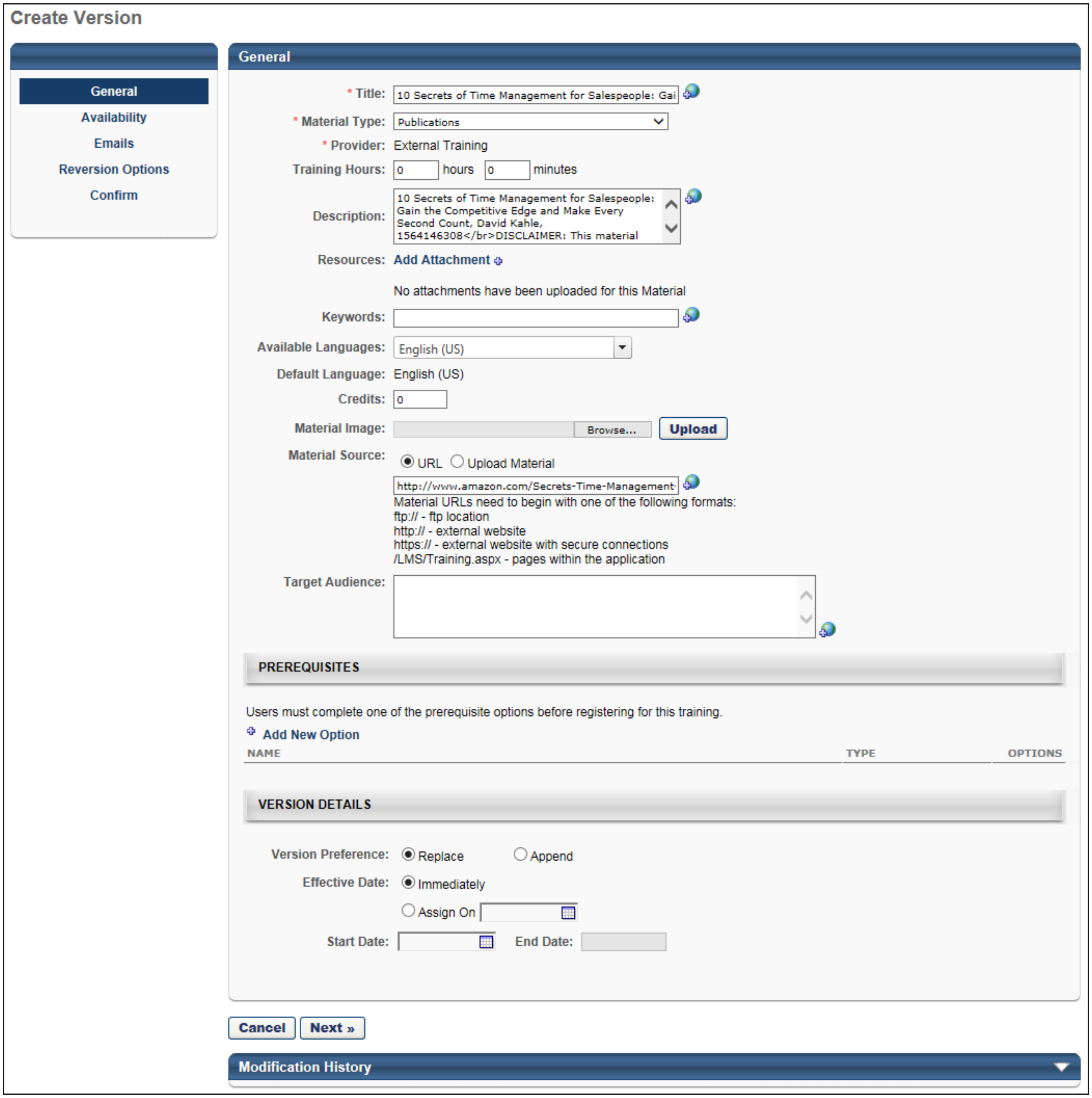
- Immediately - This option is selected by default. When this option is selected, the new material version is immediately available to be requested or assigned. If the Replace option is selected, then the previous version of the material becomes Expired immediately after the new version is created.
- Assign On - When this option is selected, the new material version is not available to be requested or assigned until the specified date. If the Replace option is selected, then the previous version of the material becomes Inactive on the specified date. The selected date must be the current date or a date in the future. Also, this date must be before the selected Start Date. **Note:** *If the selected date is a date in the future, then users are not selectable on the Reversion Options page. In this situation, all users who match the Reversion Options criteria are automatically selected.*

Start Date - Enter the date on which the new version officially replaces the previous version. When the Start Date is set for the new version, this date is automatically set as the End Date for the previous version. When the Start Date occurs, the previous version is automatically expired. This date must be on or after the Effective Date. As a best practice, the Start Date should always be specified when creating a new material version because it cannot be edited after the new version is created.

- If the Replace option is selected, then this field is optional.
- If the Append option is selected, then this field is required.

End Date - The End Date for a material version cannot be set by administrators. It is automatically set when a newer version of the material is created. When this occurs, the End Date of the previous version is automatically set as the Start Date of the newer version.

With the November 13, 2015 patch release, if an organization decides to opt out of material versioning, then the **Start Date** and **End Date** fields in the *Version Details* section do not appear when creating or editing a material.


Create Version
General
Availability
Emails
Reversion Options
Confirm
General
* Title: 10 Secrets of Time Management for Salespeople: Gai
* Material Type: Publications
* Provider: External Training
Training Hours: 0 hours 0 minutes
Description: 10 Secrets of Time Management for Salespeople: Gain the Competitive Edge and Make Every Second Count, David Kahle, 1564146308</br>DISCLAIMER: This material
Resources: Add Attachment
No attachments have been uploaded for this Material
Keywords:
Available Languages: English (US)
Default Language: English (US)
Credits: 0
Material Image: Browse... Upload
Material Source: URL Upload Material
http://www.amazon.com/Secrets-Time-Management-
Material URLs need to begin with one of the following formats:
ftp:// - ftp location
http:// - external website
https:// - external website with secure connections
/LMS/Training.aspx - pages within the application
Target Audience:
PREREQUISITES
Users must complete one of the prerequisite options before registering for this training.
Add New Option
NAME
TYPE
OPTIONS
VERSION DETAILS
Version Preference: Replace Append
Effective Date: Immediately
Assign On
Start Date:
End Date:
Cancel
Next »
Modification History

Material - Create Version - Reversion Options

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

Note: *The* **Select** *option is not available in the Results section when the material version's Effective Date is in the future. The new version is automatically assigned to all users in the selected criteria.*

To create a new version of a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Next to the material, click the Create Version icon.

Permissions

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. The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning a material that is contained within a curriculum. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Learning - Administration
Material Version - Manage	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission	Learning - Administration

	can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an administrator permission.	
Proxy Enrollment - Standard, Dynamic	Grants ability To create Standard and Dynamic proxy enrollment requests, to assign training to users. This is an administrator permission.	Learning - Administration

Reversion Options

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

- **Status** - Select which transcript statuses should be assigned the new version of the material. For example, if the In Progress option is selected, then users who have an In Progress status for another version of the material will be assigned the new version of the material. 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 material. The following status options are available:
  - Not Started - This status includes users in a Registered, Registered Past Due, Register/Not Available, or Register/Not Available Past Due status.
  - In Progress - This option is only available if a signature is required to view a curriculum. This is controlled by a backend setting, which is disabled by default. This is only available for IRS clients.
  - Completed - This status includes users in a Completed, Completed Equivalent, or Exempt status.
- **Assign To** - Select which users who have a previous version of the material on their transcript are assigned the new version of the material. The following options are available:
  - Users with Previous Version(s) on Transcript - This option is selected by default. When this option is selected, all users who have a previous version of the material on their transcript are assigned the new version of the material.
  - Users Assigned by Dynamic Proxy - When this option is selected, administrators can select a specific dynamic, non-recurring proxy

enrollment, and users who were assigned the material within the selected dynamic proxy enrollment are assigned the new version of the material. Dynamic proxy enrollments for all previous versions of the material are available. This includes if the material is assigned within curriculum. All available dynamic, non-recurring 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 material on their transcript are assigned the new version of the material. The constraints on the administrator's Material Version - Manage permission determine which OUs can be selected and which users are available to the administrator in the *Results* section.

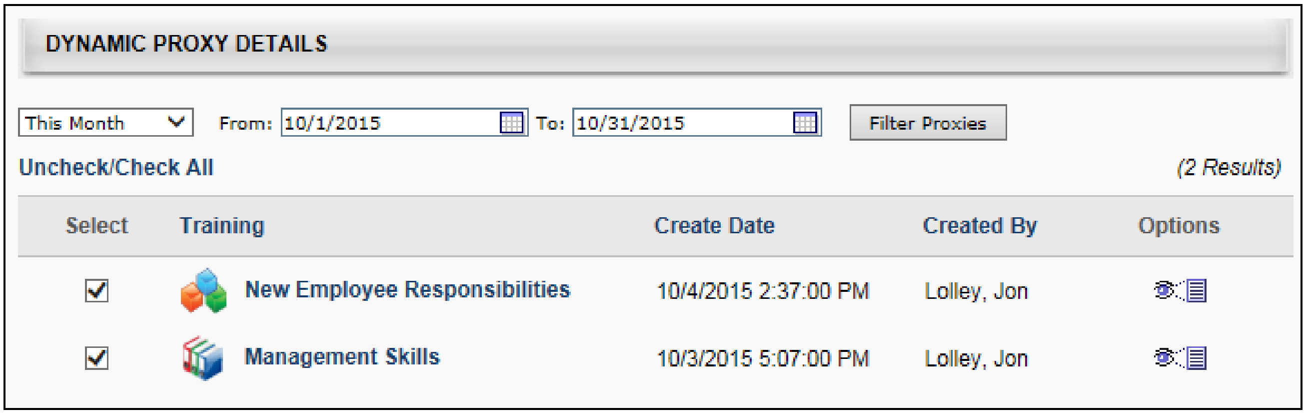
Dynamic Proxy Details

When the **Users Assigned by Proxy** option is selected in the *Assign To* section, the *Dynamic Proxy Details* section appears and displays historical dynamic, non-recurring proxy enrollments for all previous versions of the material. This includes if the material is assigned within a curriculum. All available dynamic, non-recurring 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 proxy enrollments 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 **Select** 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.



Impacted Curricula

Important: *Impacted curricula are only reversioned if the administrator has permission to manage curricula versions.*

If the reversioned material is included in a curriculum, then the new version of the material is automatically updated within the newest version of the curriculum that contains the material. When this occurs, the curriculum is reversioned. The effective date of the new curriculum version is set to the effective date of the new material version. The comments for the new curriculum version are the same as the new material version. This occurs even if there are no users enrolled in the curriculum.

- If the new material version replaces the previous version, then the new version maintains the same settings within the curriculum as the previous version (i.e., item sequence, number of required items, pay upfront, pre-approved, auto-register).
- If the new material version appends the previous version, then the behavior depends on whether there are already two versions of the material within the curriculum.
    - If there is currently only one version of the material in the curriculum, then the new version is added with the same sequence number as the previous version. If all items in the section are required, then the new version is also required. If not all items in the section are required, then the number of required items for the section is unchanged. The new version has the same pay upfront, pre-approved, and auto-register settings.
    - If there are currently two versions of the material in the curriculum, then the new version replaces the expired version in the curriculum. The new version is added with the same sequence number as the expired version. The number of required items for the section is unchanged. The new version has the same pay upfront, pre-approved, and auto-register settings.

Because two versions of a material may exist in a curriculum, one of the versions within the curriculum may expire, leaving only one active version. When this occurs, the sequence is unaffected, because both versions had the same sequence number. The number of required items in the section returns to its value prior to adding the appended version.

The number of curricula that contain the previous version of the material and are impacted by the reversioning is displayed above the *Results* section. This is only displayed if the administrator has permission to manage curricula versions.

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 material as an individual item or within a 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 Material Version - Manage permission determine which users are available in the *Results* section.

Select the **Select** checkbox to the left of a user to assign the new version of the material to the user. The selected users are immediately added to the proxy queue when the reversion is confirmed on the Confirm page. **Note:** *If the material's Effective Date is in the future, then all users in the Results section are selected by default and cannot be unselected.*

Back, Next, or Cancel

Click **BACK** to return to the Email step. *See* **Material - Create/Edit - Emails** *on* page 175 *for additional information.*

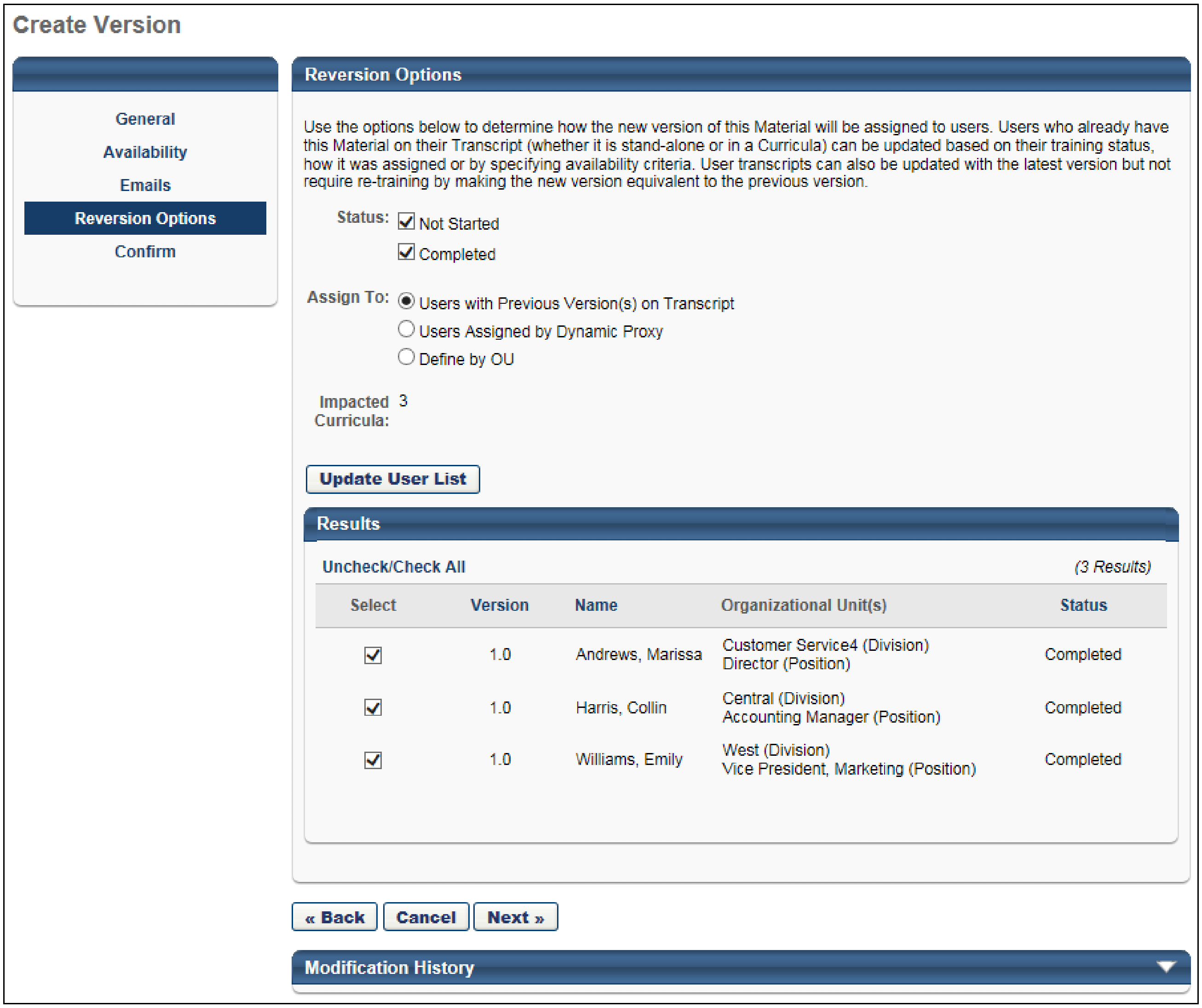
Click **NEXT** to proceed to the Confirm step. *See* **Material - Create Version - Confirm** *on* page 227 *for additional information.*

Click **CANCEL** to cancel the edits to the material and return to the Material Administration page. **Note:** *No modifications to the material are saved.*

Modification History

The *Modification History* section displays a record of each time the material is modified. This includes the modification description, the name of the user who modified the material, and when the modification occurred.

This section is only available when editing a material and when creating a new version of a material.


Create Version
General
Availability
Emails
Reversion Options
Confirm
Reversion Options
Use the options below to determine how the new version of this Material will be assigned to users. Users who already have this Material on their Transcript (whether it is stand-alone or in a Curricula) can be updated based on their training status, how it was assigned or by specifying availability criteria. User transcripts can also be updated with the latest version but not require re-training by making the new version equivalent to the previous version.
Status:
Not Started
Completed
Assign To:
Users with Previous Version(s) on Transcript
Users Assigned by Dynamic Proxy
Define by OU
Impacted Curricula: 3
Update User List
Results
Uncheck/Check All
(3 Results)
Select
Version
Name
Organizational Unit(s)
Status
1.0
Andrews, Marissa
Customer Service4 (Division) Director (Position)
Completed
1.0
Harris, Collin
Central (Division) Accounting Manager (Position)
Completed
1.0
Williams, Emily
West (Division) Vice President, Marketing (Position)
Completed
« Back
Cancel
Next »
Modification History

Material - Create Version - Confirm

The Confirm page enables administrators to view a summary of the material and define when the new material version is due. Administrators can also provide comments to describe the material changes.

To create a new version of a material, go to **Admin > Tools > Learning > Catalog Management > Materials**. Next to the material, click the Create Version icon.

Permissions

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. The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning a material that is contained within a curriculum. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Learning - Administration
Material Version - Manage	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page, create materials, and edit materials. Once created, these "materials" can be managed like other learning objects via the course catalog. If Material Versioning is disabled, administrators with this permission can edit the material source via the Course Catalog and can edit the material's active status from the Material Administration page. This permission can be constrained by OU and User's OU. The constraints on this permission determine which materials the administrator is able to view, edit, and create. This is an	Learning - Administration

	administrator permission.	

Version Summary

At the top of the Confirm page, a summary of the new material version is displayed. This includes the following details:

- Title
- Type
- Versioning Preference (Append or Replace)
- Effective Date
- Start Date

Due Date

Select when the new version of the material is due for the assigned users. The following options are available:

- No Due Date
- Training is due - Using the calendar tool, select the date on which the material is due for assigned users. If multiple instances of the material exist on the user's transcript, the earliest due date applies to the material.

The selected Material Reversion Due Date setting is set for the following:

- Due date for stand-alone versions of the material that are assigned to users.
- Due date for materials within a curriculum on a user’s transcript.
- Due date for materials within a curriculum in Curricula Administration.

Comment

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 material's Transcript Details page for assigned users and in the material's Modification History within the Course Catalog and Material Administration. Also, if any curricula are impacted, then these comments appear in the curriculum's 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 material. This list of users is based on the selections that were made on the Reversion Options page. **Note:** *Because this list is based on the selections on the Reversion Options page, if the administrator has not yet* *clicked the* **UPDATE USER LIST** *button on the Reversion Options page, then the list on the Confirm page may differ from the list on the Reversion Options page. The list on the Confirm page is the final list.*

Back, Save, or Cancel

Click **BACK** to return to the Reversion Options page. *See* **Material - Create Version - Reversion Options** *on* page 221 *for additional information.*

Click **SAVE** to create a new version of the material. The selected users are immediately added to the proxy queue. Once the proxy is processed, users are assigned the new version of the material and the new version of the material can be requested via Browse for Training or Global Search based on the material version's availability. This triggers the Updated Training email, if configured in Email Management.

- If the user has completed the previous version and the new version replaces the previous version, then the new version is added to the user's transcript and the RegNum is increased. The status of the new version is dependent on the LO settings in Course Catalog.
- If the user has completed the previous version and the new version appends the previous version, then the new version is added to the user's transcript and the RegNum is 1.
- If the user has registered for and not completed the previous version and the new version replaces the previous version, then the new version is added to the user's transcript and the RegNum is not changed. The status of the new version is Registered.
- If the user has registered for and not completed the previous version and the new version appends the previous version, then the new version is added to the user's transcript and the RegNum is 1.
- If a user is selected and they have the material in a curriculum on their transcript, then the user automatically receives the new version of the curriculum. The effective date of the new curriculum version is set to the effective date of the new material version. The comments for the new curriculum version are the same as the new material version. The user's curriculum progress is maintained. **Important:** *Impacted curricula are only reversioned if the administrator has permission to manage curricula versions. Also, the new curriculum version is only assigned to users if the curriculum is within the constraints of the administrator's permission to manage curricula versions.*

Click **CANCEL** to cancel the edits to the material and return to the Material Administration page. **Note:** *No modifications to the material are saved.*

Emails

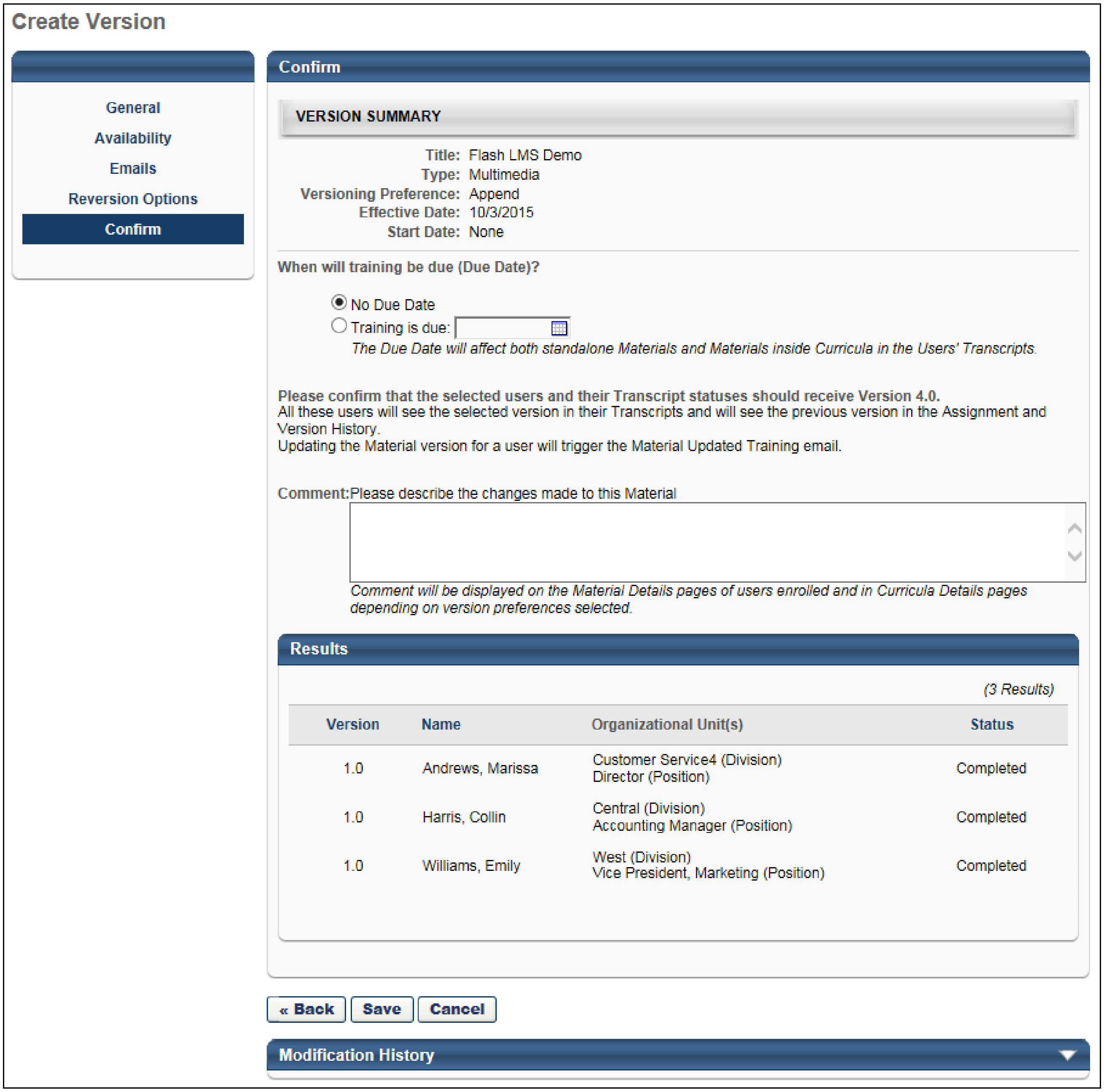
EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE

Updated Training	Training has been updated to a new version. This is triggered by the user getting automatically updated to a new version of a LO. This email is only triggered by updates to LOs that are versioned, such as a test or curriculum. The **TITLE** tag enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO. The **MATERIAL.START.DATE** tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email. The **MATERIAL.END.DATE** tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email.	System Administration

Modification History

The *Modification History* section displays a record of each time the material is modified. This includes the modification description, the name of the user who modified the material, and when the modification occurred.

This section is only available when editing a material and when creating a new version of a material.


Create Version
General
Availability
Emails
Reversion Options
Confirm
Confirm
VERSION SUMMARY
Title: Flash LMS Demo
Type: Multimedia
Versioning Preference: Append
Effective Date: 10/3/2015
Start Date: None
When will training be due (Due Date)?
No Due Date
Training is due:
The Due Date will affect both standalone Materials and Materials inside Curricula in the Users' Transcripts.
Please confirm that the selected users and their Transcript statuses should receive Version 4.0.
All these users will see the selected version in their Transcripts and will see the previous version in the Assignment and Version History.
Updating the Material version for a user will trigger the Material Updated Training email.
Comment:Please describe the changes made to this Material
Comment will be displayed on the Material Details pages of users enrolled and in Curricula Details pages depending on version preferences selected.
Results
(3 Results)
Version
Name
Organizational Unit(s)
Status
1.0
Andrews, Marissa
Customer Service4 (Division)
Director (Position)
Completed
1.0
Harris, Collin
Central (Division)
Accounting Manager (Position)
Completed
1.0
Williams, Emily
West (Division)
Vice President, Marketing (Position)
Completed
« Back
Save
Cancel
Modification History

Material Approval Workflow

When a material is reversioned, the initial and completion approval settings are copied from the old version to the new version. If a user has received initial approval for the old version of the material, then approval is not required for the new version of the material. If the old version of the material requires completion approval, then the new version also requires completion approval.

Only standard approval workflows are copied from the old version to the new version. Custom approval workflows are not copied to the new version.

Expired Materials in Curricula

Because two versions of a material may exist in a curriculum, one of the versions within the curriculum may expire, leaving only one active version.

If the administrator selected the Replace option when creating the new version, then the curriculum containing the material is reversioned. The curriculum only contains the new, active material. This is consistent with reversioning of curricula, tests, and online courses.

If the administrator selected the Append option when creating the new version, then when the previous version expires, then the user can see the inactive version in the curriculum. This enables the user to understand that the material version is inactive.

Material Pricing

When a new version of a material is created, the pricing from the previous version is not automatically copied to the new version. Administrators must configure pricing for the new version in Course Catalog.

When a material is reversioned and the material is not within a curriculum, the following pricing rules apply:

- If the Replace option is selected for the new version, the user is not asked to pay for the new material version.
- If the Append option is selected for the new version, the user is asked to pay for the new material version.

When a material is reversioned and the material is within a curriculum, the following pricing rules apply:

- The **Pay Upfront** option is selected for the material - Payment is bypassed for the material and the curriculum.
- The **Pay Upfront** option is not selected for the material - Payment is due for the new version of the material when the user activates the material within the curriculum.

Proxy Enrollment - Reversioned Material

If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material is available to select when proxy enrolling users into training. Users who already have a previous version of the material on their transcript will only receive the new version of the material if the **Force Initial Enrollment** option is selected for the proxy enrollment.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material are available to select when proxy enrolling users into training. Administrators can select both versions for the proxy enrollment and both versions of the material can appear on the user's transcript at the same time. This is true until the previous version of the material expires. Users who already have the previous version of the material on their transcript will keep the previous version and will also receive the new version. If the proxy enrollment is set to process on a future date and one of the versions expires, then the proxy enrollment is processed, but the expired version is not assigned to users.

Course Catalog - Reversioned Material

If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material is available when Course Catalog is searched and Current Version is selected from the Version filter. The replaced version is available if Course Catalog is searched and All Versions is selected from the Version filter.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material are available when Course Catalog is searched. This applies whether Current Version or All Versions is selected from the Version filter. This is true until the previous version of the material expires.

This only applies to organizations using the new Course Catalog Search functionality.

With the November 13, 2015 patch release, if an organization decides to opt out of material versioning, then administrators with the Materials Management permission can edit the Material Source via the Course Catalog and when editing a material.

Assign Training - Reversioned Material

If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material can be assigned to users from the LO Details page.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material are available to be assigned to users from the LO Details page. This is true until the previous version of the material expires.

Browse for Training - Reversioned Material

If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material is available when browsing for training. When accessing the Learning Object (LO) Details page for the material, the LO Details page reflects the new version of the material.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material are available when browsing for training. This is true until the previous version of the material expires. When accessing the LO Details page for the material, the LO Details page reflects the selected version of the material.

Global Search - Reversioned Material

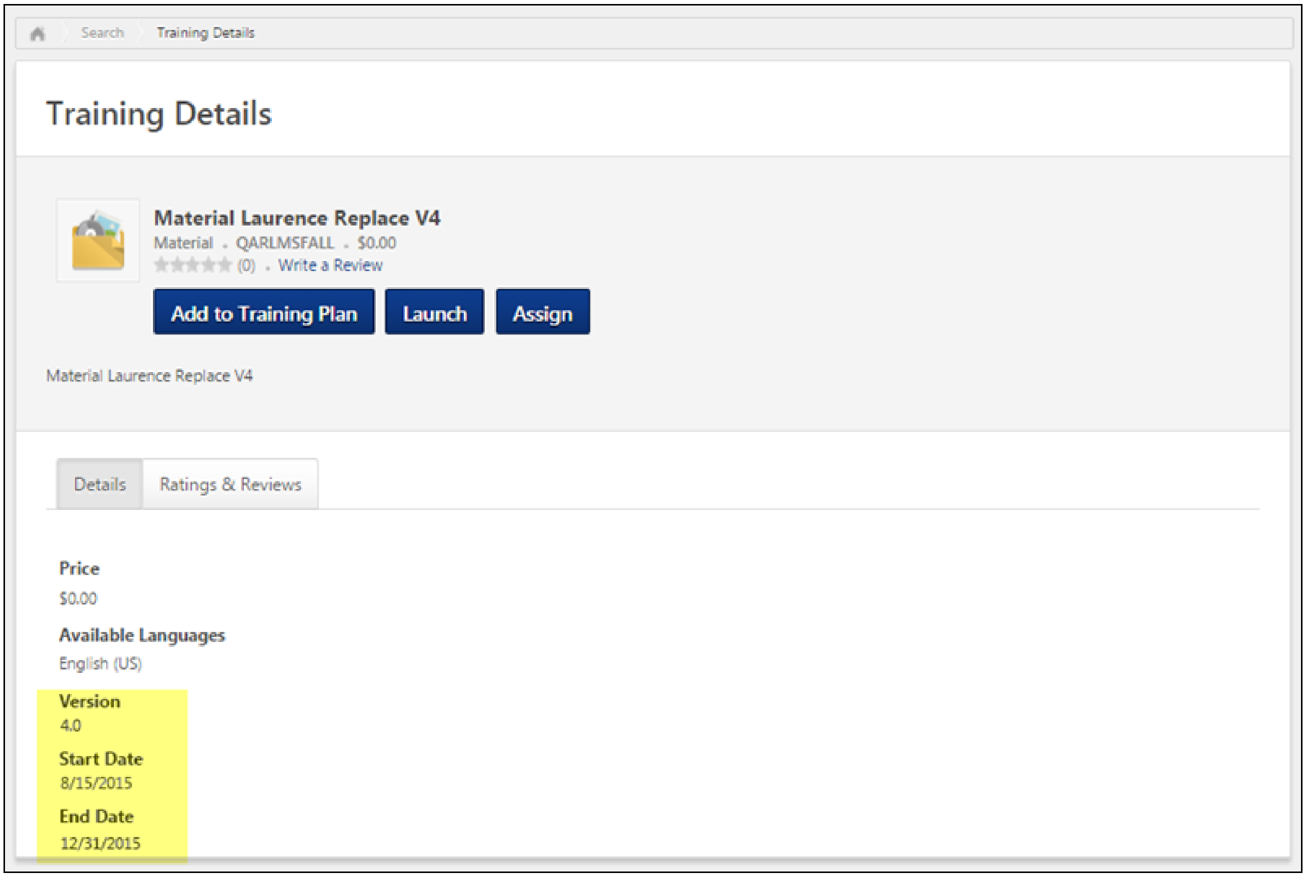
If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material is available when searching via Global Search. When accessing the Learning Object (LO) Details page for the material, the LO Details page reflects the new version of the material.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material are available when searching via Global Search. This is true until the previous version of the material expires. When accessing the LO Details page for the material, the LO Details page reflects the selected version of the material.

LO Details Page

When viewing the Learning Object (LO) Details page for a material, the Start Date and End Date for the material are now displayed. These values represent when the material version is active. If the material does not have a start date or end date, then the field does not display.

Also, the material version number is displayed.



Training Search Pop-ups - Reversioned Material

If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material is available when searching for training via a Training Search pop-up.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material are available when searching for training via a Training Search pop-up. This is true until the previous version of the material expires.

The Training Search pop-up can be accessed from the following areas:

- Certification Administration - Framework
- Course Catalog - Prequisites, Pre-work, and Post-work
- Curricula Administration - Structure
- Deep Link Generator for LO Details
- Define Payment Account - Define Criteria by Training
- Order Form Management
- Permission Constraints by LO
- Preferences - Custom Certificates
- Purchase by Proxy
- Training Plan
- Universal Profile - Assign Training

Request Training - Reversioned Material

If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material is available to be requested by users from the LO Details page.

- If a user does not have any version of the material on their transcript, then the requested version is added to their transcript if the request is approved.
- If a user has version 1 of the material on their transcript and they request version 2, then version 2 replaces version 1 on their transcript if the request is approved.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material are available to be requested by users from the LO Details page. This is true until the previous version of the material expires.

- If a user requests a version of material that is not on their transcript, then the requested version is added to their transcript if the request is approved.
- If a user has a version of a material on their transcript and they request another active version of the material, then both active versions appear on their transcript if the request is approved.

Transcript - Reversioned Material

If the administrator has reversioned a material and the new version replaces the previous version, then only the new version of the material can exist on a user's Transcript.

If the administrator has reversioned a material and the new version appends the previous version, then the previous version and the new version of the material can exist on a user's Transcript at the same time. Both materials can be launched and marked as complete. This is true until the previous version of the material expires.

Transcript Details Page

When viewing the Transcript Details page for a material, the Start Date and End Date for the material are now displayed. These values represent when the material version is active. If the material does not have a start date or end date, then the field does not display.

The material version is now displayed.

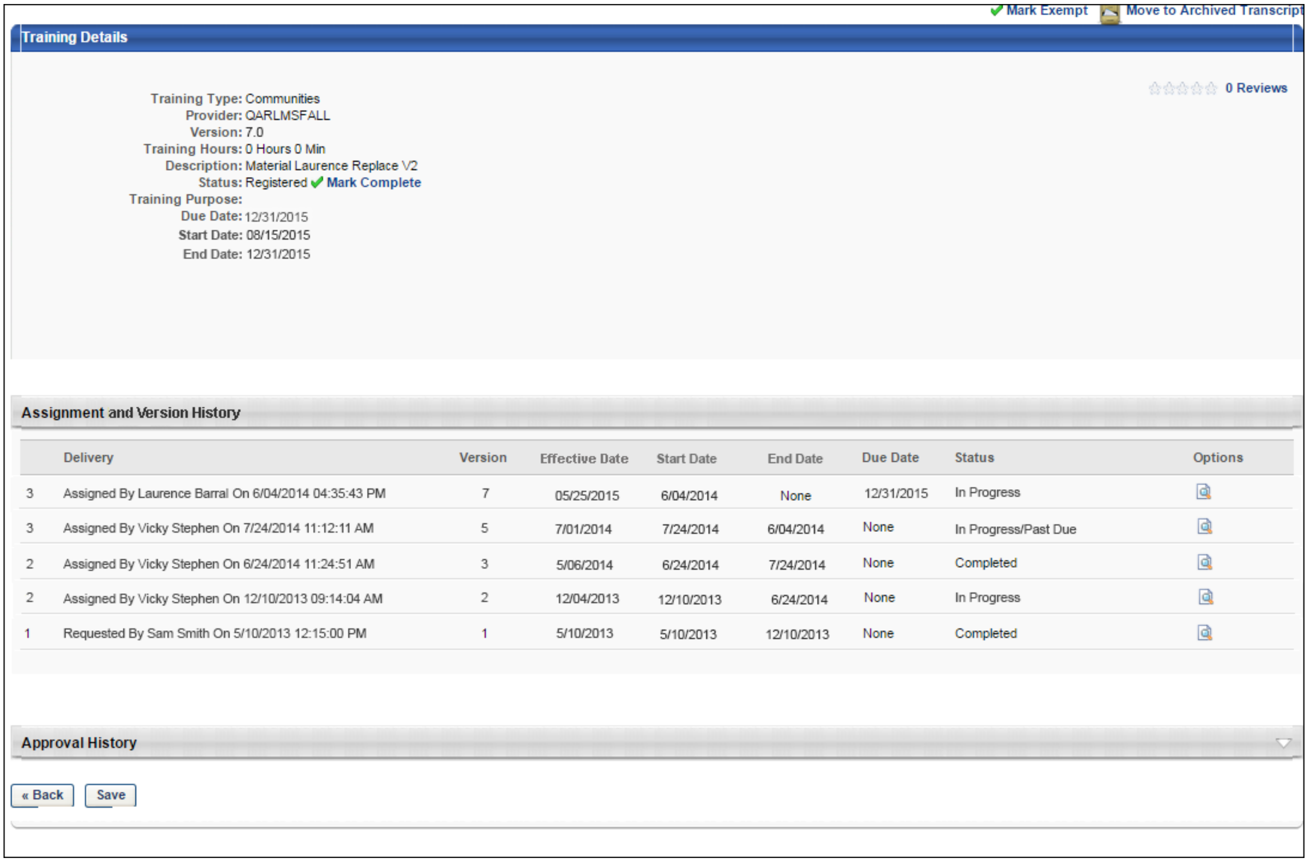
Also, a new *Assignment and Version History* section is now available.

The *Assignment and Version History* section displays the different versions of the material the user has been assigned or has requested. This section displays the following information:

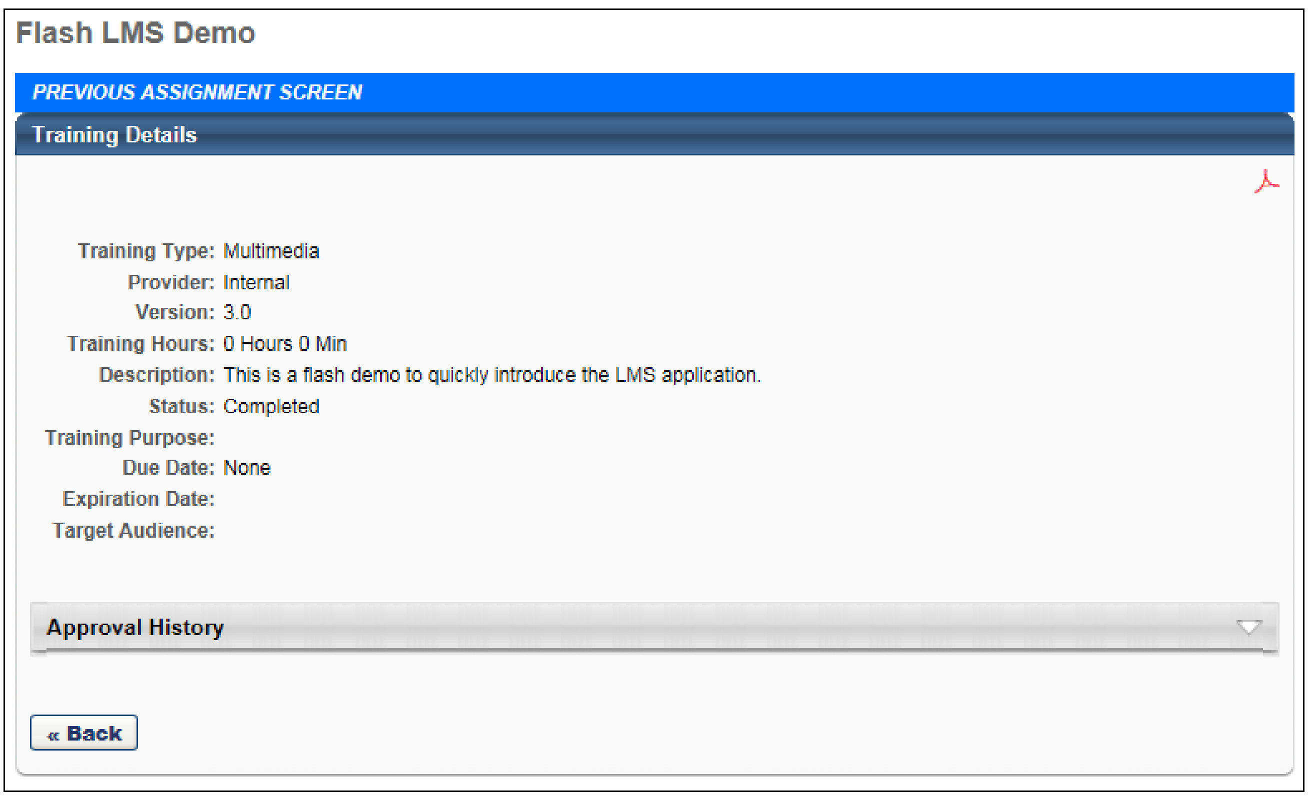
- Registration Number (RegNum) - Displays the registration number associated with the material.
- Delivery - Displays how the material was delivered to the user, such as when it was requested or assigned.
- Version - Displays the material version.
- Effective Date - Displays the date on which the material was effective for the user.
- Start Date - Displays the start date for the material version.
- End Date - Displays the end date for the material version.
- Due Date - Displays when the material was due.
- Status - Displays the user's material status.

In the *Assignment and Version History* section, the following options may be available in the Options column:

- View Details - Users can click this icon to view a read-only version of the Training Details page for the material version. At the top of the page, "Previous Assignment Screen" is displayed to indicate that this page is displaying training details for a previous assignment of the material. This page can be exported to PDF.
- Print Certificate - If the material is completed and there is a certificate available for the material version, then users can click this icon to print the material version's completion certificate.



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



Additional Tags for Updated Training Email Trigger

The following email tags are now available for the Updated Training email trigger:

- MATERIAL.START.DATE - If the updated training is a material, then this tag displays the start update of the updated material. If this field is not defined for the training, then this tag is not included in the email.
- MATERIAL.END.DATE - If the updated training is a material, then this tag displays the end update of the updated material. If this field is not defined for the training, then this tag is not included in the email.
- TITLE - This displays the title of the updated training.

Proxy Enrollment - Recurring Processing Enhancements

Prior to this enhancement, if a learning object (LO) in a recurring proxy enrollment became inactive or had a status of Disapproved for a user, the inactive or Disapproved LO was still assigned to the selected users. In addition, if a LO in a recurring proxy enrollment was reversioned, the older version of the LO was assigned to users in subsequent assignments.

With this enhancement, if a LO in a recurring proxy enrollment becomes inactive, the inactive LO is not assigned to the selected users. If a LO in a recurring proxy enrollment has a status of Disapproved for a user, the LO is not assigned to the user. In addition, if a LO in a recurring proxy enrollment is reversioned, the newest version of the LO is assigned to users in subsequent assignments.

Implementation

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

Proxy Enrollment - Retain Search Query

Prior to this enhancement, when an administrator navigated away from and back to the Search Results page when creating a proxy enrollment, the search results were not retained.

With this enhancement, when an administrator navigates away from and back to the Search Results page when creating a proxy enrollment, the search results are now retained. This includes all search criteria on the page. This is done so that administrators do not need to reenter the search query.

The search query is retained if the administrator returns to the Search Results page by clicking the Back button, clicking the page's breadcrumbs, or clicks the Cancel button while creating a proxy enrollment.

The search query is not retained if the administrator returns to the Search Results page by completing the proxy enrollment creation process or after navigating to another page using the navigation tab.

Implementation

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

Training Title Tag Available for Updated Training Email

With this enhancement, a TITLE tag is now available for the Updated Training email trigger. This enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.

This email is only triggered by updates to LOs that are versioned. This includes the following LO types:

- Test
- Curriculum
- Online Class
- Material

Implementation

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

Transcript Redesign & Universal Profile Bio/About Auto-upgrade

With the June 2014 Release, the Transcript page is redesigned with an improved user experience and is accessible from the Universal Profile.

With this enhancement, all organizations using the Learning module are automatically upgraded with the new Transcript redesign. The redesigned Transcript is accessible from the Universal Profile. Upon auto-upgrade, the Universal Profile Bio About page is automatically visible and required for all Transcript users.

- The "Bio About - View" permission is automatically assigned to all users and security roles that have the "View Transcript Item" permission. Any constraints on the "View Transcript Item" permission are automatically applied to the user's "Bio About - View" permission.
- The "Bio About - View" permission allows users to view their Transcript and provides them access to the Universal Profile - Bio page. This permission also enables the small user image to the right of the Global Search box. This enables users to quickly access their Universal Profile. Removing the "Bio About - View" permission removes the user's ability to access their Transcript.
- Aside from the "Bio About - View" permission, all other permissions are unchanged.
- All relevant widgets and links now direct users to the new Transcript page within Universal Profile.

Considerations

System administrators are able to mark learning objects (LOs) as Required in the Course Catalog. Previously when doing so, a box would appear at the top of the user's Transcript to allow them to add the training to their Transcript. With the upgrade to the redesigned Transcript, this box is no longer available on the Transcript.

Previously, any certifications that were assigned to the user were available in the Certifications tab of the Transcript. With the redesigned Transcript, certifications are now included with the rest of the LOs on the user's Transcript.

The configuration of the Transcript title and description is migrated to Transcript Preferences instead of within Navigation Tabs.

Bio About - View Permission

Upon release, the "Bio About - View" permission is automatically added to every security role that currently has the "View Transcript Item" permission. Any constraints that are currently associated with the "View Transcript Item" permission are automatically applied to the "Bio About - View" permission.

For example:

1. The "View Transcript Item" permission is currently added to the "Default Role for Every User" security role, and this permission is constrained to User's Self and Subordinates."
2. Upon release, the "Bio About - View" permission is automatically added to the "Default Role for Every User" security role, and this permission is constrained to User's Self and Subordinates."

The "Bio About - View" permission must be enabled for users to access their Transcript. With this permission, users can access the Universal Profile Bio page. This page can be customized to provide as much information about the employee as desired. Users can access their transcript from the Transcript navigation tab or from the Universal Profile.

Implementation

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

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

Video Administration Enhancements

Video Administration Enhancements

Video learning objects (LOs) are being enhanced for a more consistent administration. This includes adding training hours, custom fields, a Restrict to Provider Constraint on the Video Administration - Manage/View permissions, one-click launch on LO details, and the ability to show/hide video preview on LO details.

- *See* **Enable/Disable Video LO Preview** *on* page 254 *for additional information.*
- *See* **Launch Video from LO Details Page** *on* page 259 *for additional information.*
- *See* **Specify Video LO Training Hours** *on* page 260 *for additional information.*
- *See* **Video Administration Permissions** *on* page 271 *for additional information.*
- *See* **Video LO Custom Fields** *on* page 272 *for additional information.*

Enable/Disable Video LO Preview

Enable/Disable Video LO Preview

With this enhancement, administrators now have the option to enable or disable the preview of the video learning object (LO) on the LO Details page. Administrators may choose to disable the video preview so that users are not able to view the video without adding it to their transcript.

Use Cases

Hiding the video preview on the LO Details page eliminates the issue of users consuming a video LO without having the view tracked.

Implementation

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

The video LO preview is disabled by default for all existing video LOs.

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration
Video Administration - View	Grants ability to view video learning objects (LOs) on the Video Administration page. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Create/Edit Video LO - General - Enable Preview

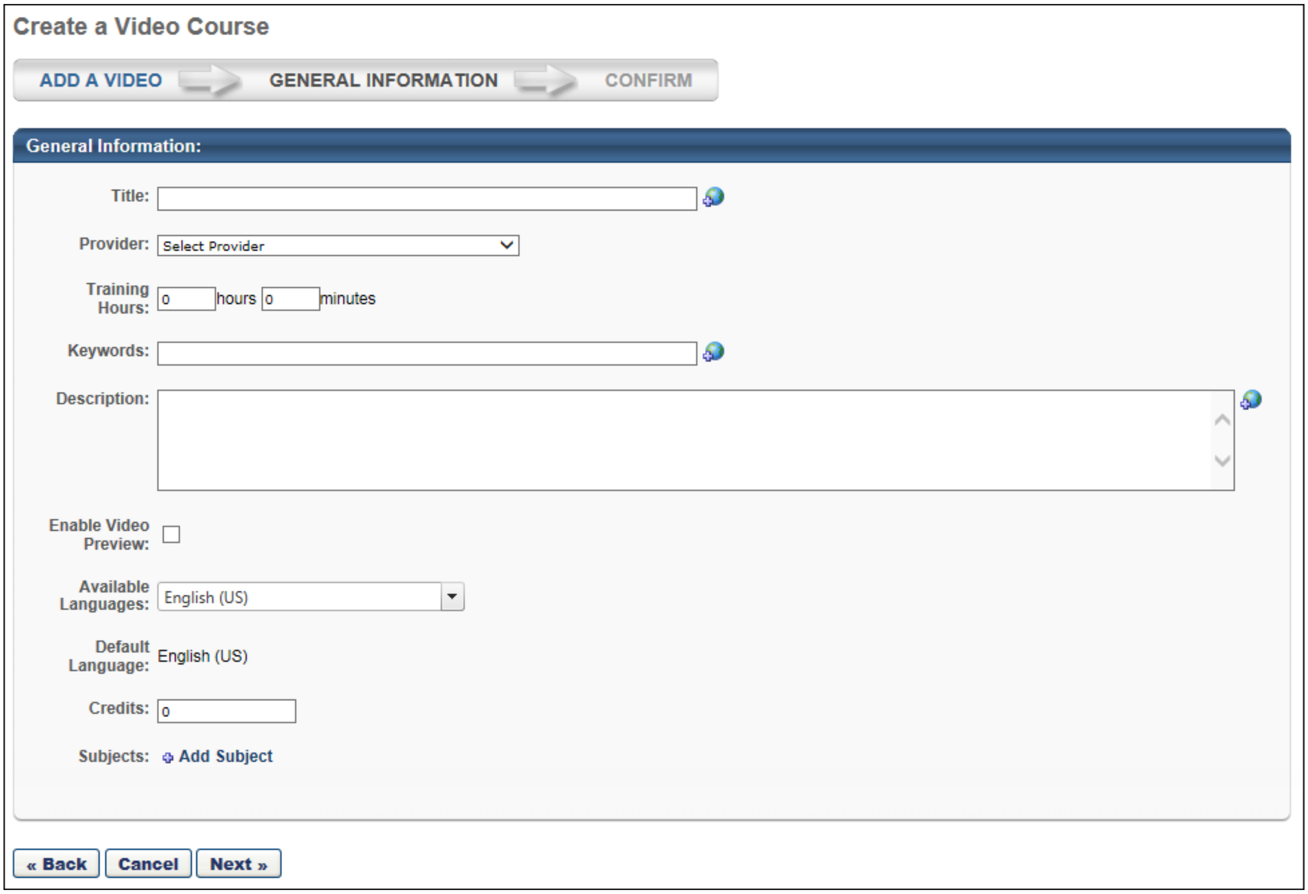
When creating or editing a video course, administrators now have the option to enable or disable the preview of the video learning object (LO) on the LO Details page.

To create a video course, go to **Admin > Tools > Learning > Catalog Management > Videos**.Then, click the **Create a Video Course** link.

Permissions

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Enable Video Preview - When this option is selected, a preview of the video LO is displayed on the LO Details page. By default, the video preview is disabled. Administrators may choose to disable the video preview so that users are not able to view the video without adding it to their transcript.


Create a Video Course
ADD A VIDEO
GENERAL INFORMATION
CONFIRM
General Information:
Title:
Provider:
Select Provider
Training Hours:
0
hours
0
minutes
Keywords:
Description:
Enable Video Preview:
Available Languages:
English (US)
Default Language:
English (US)
Credits:
0
Subjects:
Add Subject
« Back
Cancel
Next »

Create/Edit Video LO - Confirm - Enable Preview

When creating or editing a video course, administrators can now view whether the video preview is enabled or disabled for the video learning object (LO) on the Confirm page.

To create a video course, go to **Admin > Tools > Learning > Catalog Management > Videos**.Then, click the **Create a Video Course** link.

Permissions

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Launch Video from LO Details Page

Prior to this enhancement, certain learning object (LO) types could be launched directly from the LO Details page if certain conditions were met. This included Online Courses, Quick Courses, and Materials with a URL. The ability to launch a LO from the LO Details page is controlled by a backend setting.

With this enhancement, if the ability to launch a LO from the LO Details page is enabled, then this ability also applies to video LOs. Unless there is a request or approval process, the Request option is replaced with a Launch option. When the Launch option is selected, the video LO is automatically added to the user's transcript, the user is registered in the LO, and the user is directed to the Launch Video page.

If the user is viewing the LO Details page for a video LO for which the user has never registered, the Launch option is only available if the following conditions are met:

- The LO does not require approval.
- The LO is set to register upon approval.
- The LO has no prerequisites.
- The LO has no pre-work.

If the user is viewing the LO Details page for a video LO for which the user has previously registered, the Launch option is only available if the following conditions are met:

- The LO is registered or post registered.
- A link expiration rule has not passed for the LO.
- A license for the LO has not expired.

Use Case

The ability to launch and automatically register for a video LO encourages users to play videos. This also allows administrators to more accurately track which users are watching videos.

Implementation

The ability to launch a LO from the LO Details page is controlled by a backend setting. If this backend setting is enabled, then this functionality is automatically enabled in Stage, Live, and Pilot portals. If this backend setting is not enabled, then this functionality is not enabled in Stage, Live, and Pilot portals.

Specify Video LO Training Hours

Specify Video LO Training Hours

With this enhancement, administrators can now configure the training hours for video learning objects (LOs). The video training hours can be configured in Video Administration and in the Course Catalog. This enables administrators to aggregate training hours for videos in reporting.

Use Cases

- End users browsing for training
    - An end user who is browsing or searching for training may use the Training Hours information to influence their training selection or purchase.
    - Knowing how many training hours will be earned by completing the video LO is important before requesting the training.
- HR Manager reporting on training hours
    - Because administrators can configure training hours for their video LOs, the reporting and aggregate totals of training hours now include videos. This is important because some corporate training goals are based on training hours, which now includes videos.

Implementation

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

Security

The following existing permissions apply 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
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, Provider, Self and Subordinates, and User. This is an administrator	Learning - Administration

	permission.	
Video Administration - View	Grants ability to view video learning objects (LOs) on the Video Administration page. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Create/Edit Video LO - General - Training Hours

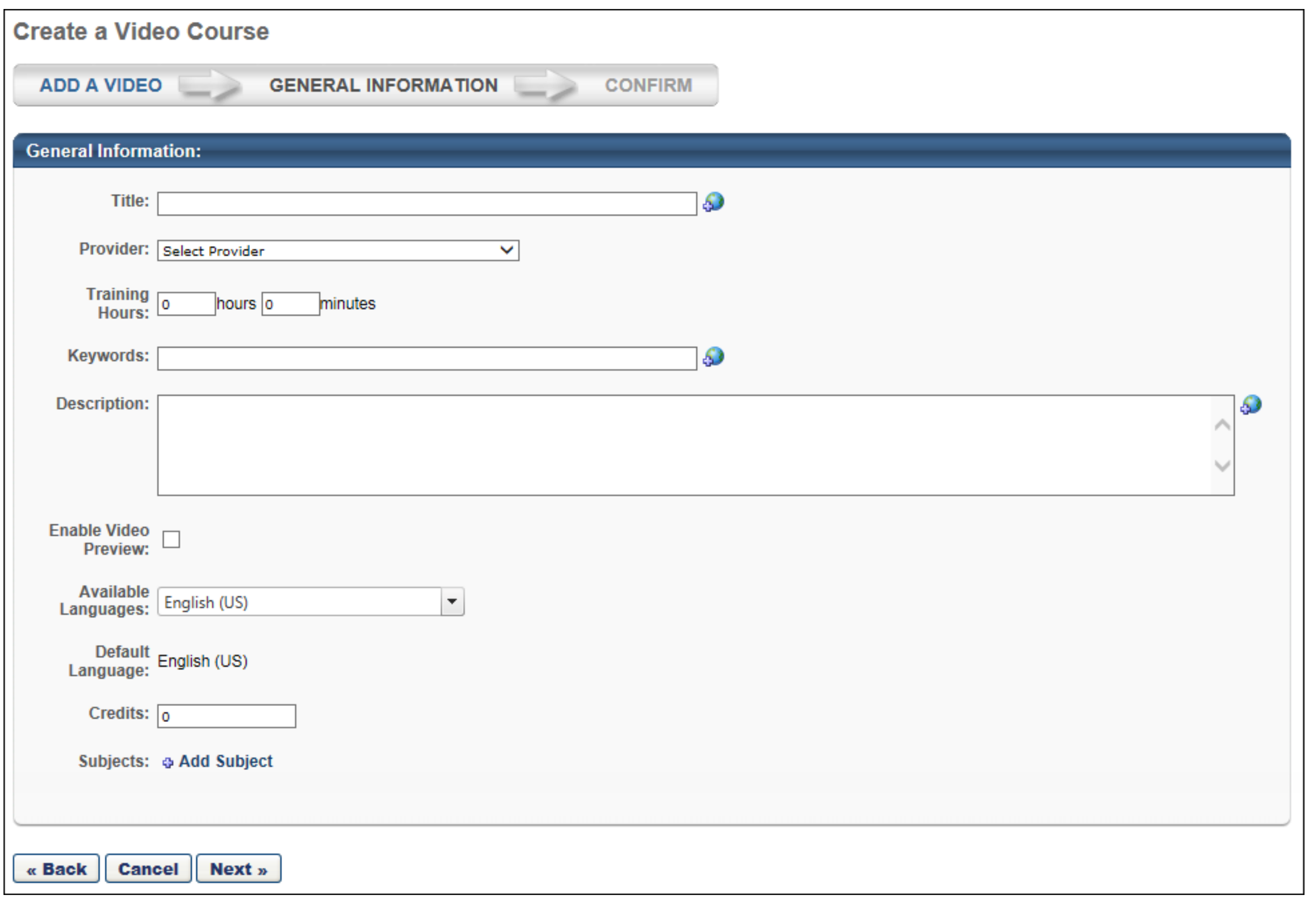
When creating or editing a video course, administrators can now specify the duration of the video learning object (LO) on the General Information page.

To create a video course, go to **Admin > Tools > Learning > Catalog Management > Videos**.Then, click the **Create a Video Course** link.

Permissions

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Training Hours - Enter the training hours associated with the video course in hours and minutes. This field is optional.



Create/Edit Video Course - Confirm - Training Hours

When creating or editing a video course, administrators can now view the training hours of the video learning object (LO) on the Confirm page.

To create a video course, go to **Admin > Tools > Learning > Catalog Management > Videos**.Then, click the **Create a Video Course** link.

Permissions

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Course Catalog - General - Training Hours

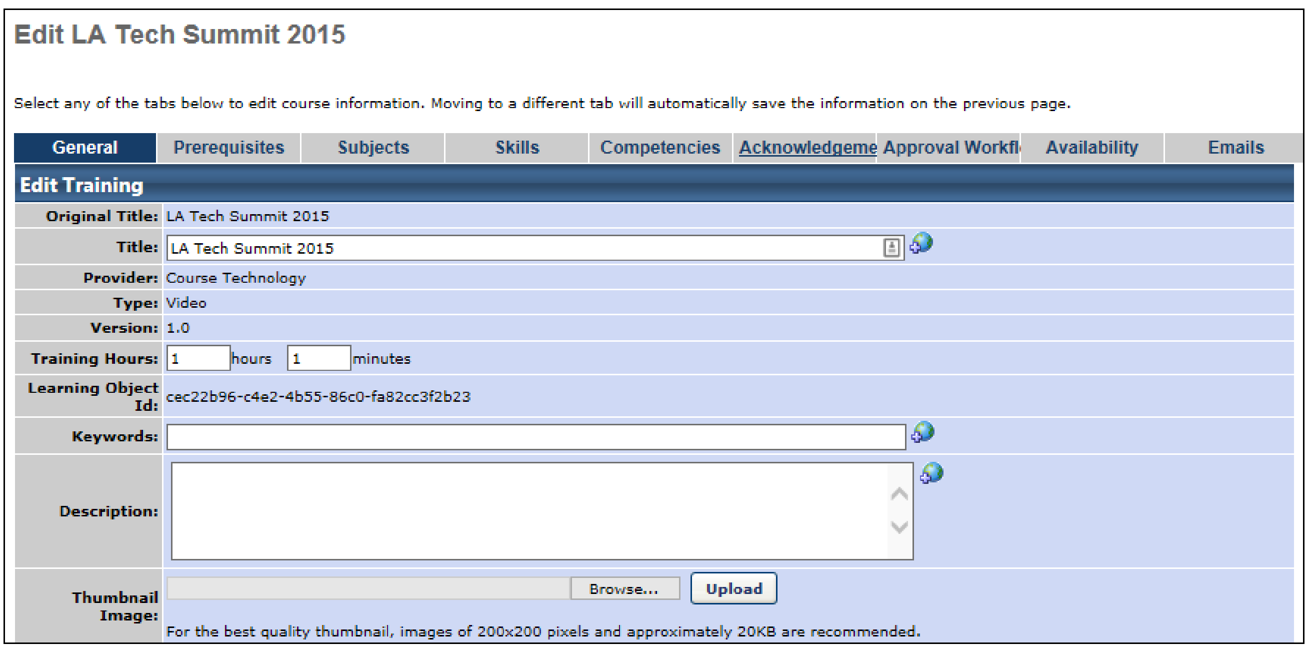
When editing a video course via Course Catalog, administrators can now specify the training hours associated with the video learning object (LO) on the General page.

To access the Course Catalog, go to **Admin > Tools > Learning > Catalog Management > Course Catalog**.

Permissions

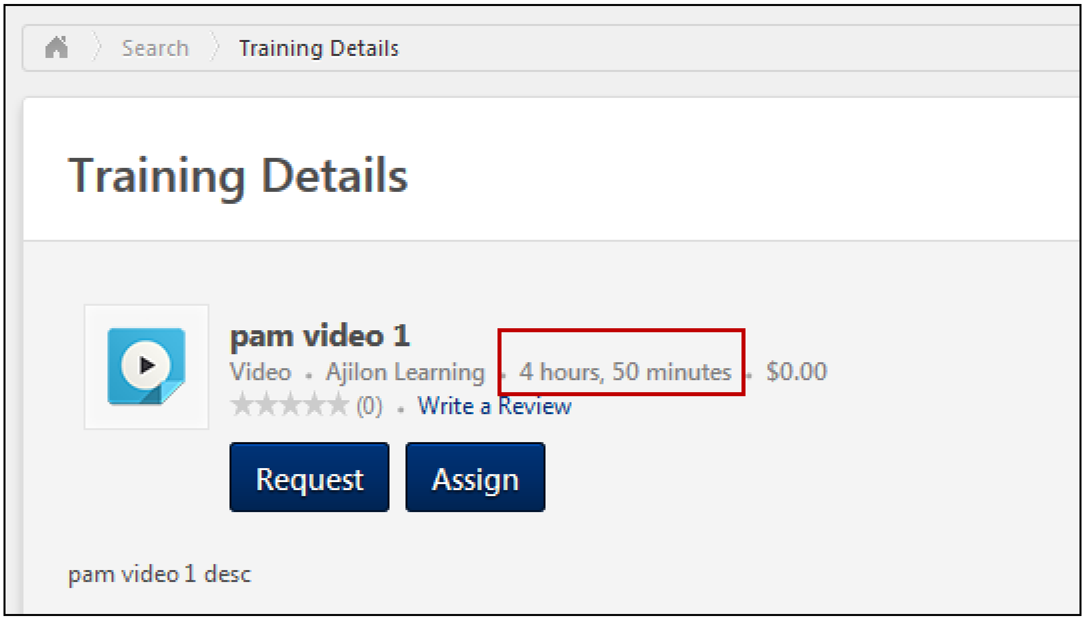
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	Learning - Administration

Training Hours - Enter the training hours associated with the video course in hours and minutes. This field is optional.



LO Details Page - Training Hours

When viewing the LO Details page for a video learning object (LO), the training hours are displayed for the LO. The default value is zero hours and zero minutes.

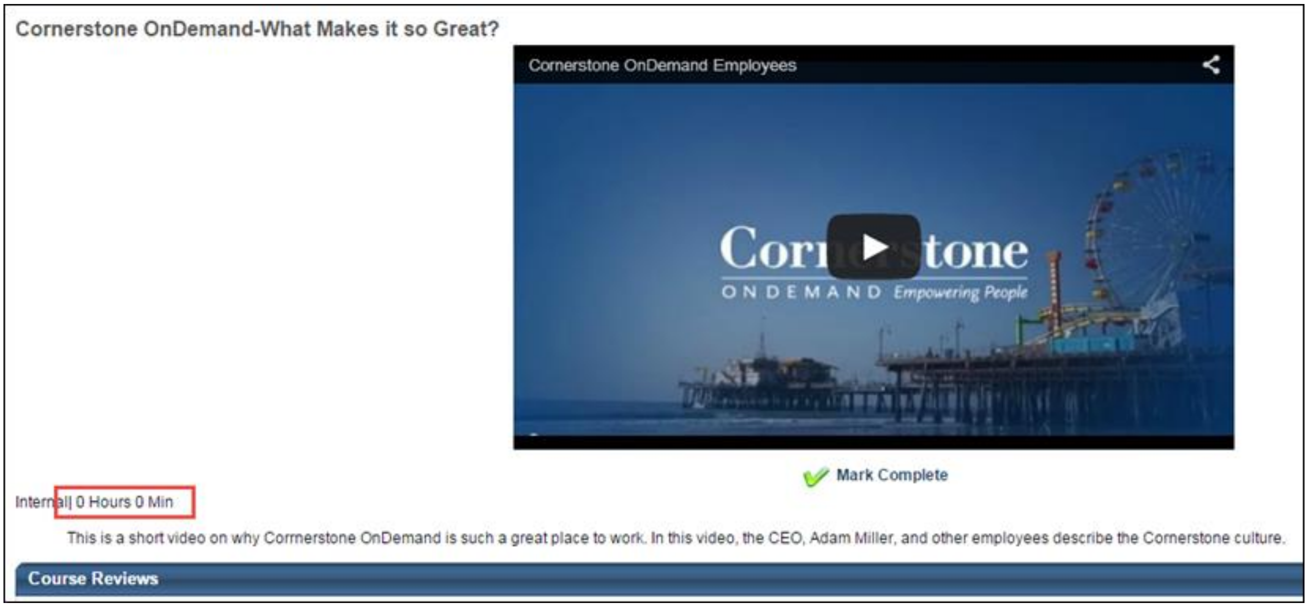


Transcript Details - Training Hours

When viewing the Transcript Details page for a video learning object (LO), the training hours are displayed for the LO. The default value is zero hours and zero minutes.

Launch Video from Transcript - Training Hours

When launching a video learning object (LO) from the transcript, the training hours are displayed for the LO. The default value is zero hours and zero minutes.



Training Hours in Reports

The training hours for video learning objects (LOs) are now included in aggregate training hours on the transcript, custom reports, and the following standard reports:

- Transcript Status
- Training Demand Forecast Summary
- LMS Transcript Report (from the Transcript page)

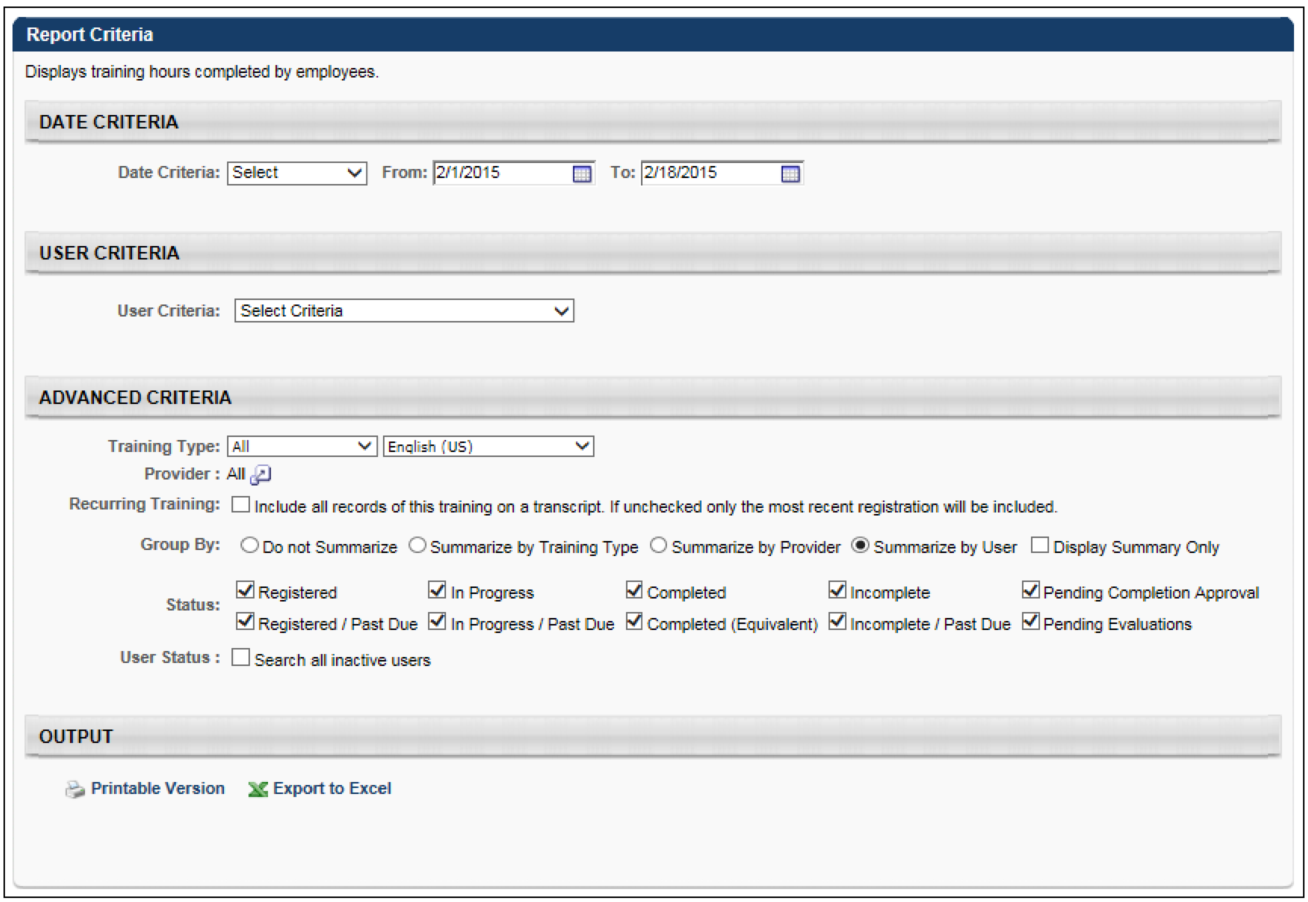
Training Hours Report - Include Video LOs

With this enhancement, a Video option is now available in the Training Type filter on the Training Hours report. This enables users to filter the report output to only include training hours from video learning objects (LOs).

To access the Training Hours report, go to **Reports > Standard Reports**. From the Training tab, click the **Training Hours** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Hours Report	Grants access to Training Hours Report, which displays training hours completed by populations of users. This permission can be constrained by User's Corporation, User's OU, and OU.	Reports - Training



Video Administration Permissions

With this enhancement, the Video Administration - View and Video Administration - Manage permissions can now be constrained by Provider. When these permissions are constrained by provider, the administrator can only view and manage videos that are associated with the constrained providers.

Implementation

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

Security

The following permissions have been enhanced and can now be constrained by Provider. The permission descriptions will be updated upon release.

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration
Video Administration - View	Grants ability to view video learning objects (LOs) on the Video Administration page. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Video LO Custom Fields

Video LO Custom Fields

With this enhancement, video learning objects (LOs) now support custom fields.

Implementation

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

Security

The following existing permissions apply 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
Course Catalog - View	Grants access to view the learning objects 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, and User's LO Availability. This is an administrator permission.	Learning - Administration
Display all Training Custom Fields	Enables display of all training custom field values including blank fields when viewing details of training on transcript. Without this permission, the custom field will only appear if it is populated with a value. This is an end user permission.	Learning
Global Search - Training	Grants ability to search for training via Global Search. If this permission is constrained to a specific OU, then that constraint is automatically applied within Global Search, including search filters and search results. This is an end user permission. The availability of this permission is controlled by a backend setting.	Learning
Training Custom	Grants ability to create and edit custom fields to be used for one or more learning object types.	Learning - Administration

Fields	This is an administrator permission.	
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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration
Video Administration - View	Grants ability to view video learning objects (LOs) on the Video Administration page. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU, User's OU, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

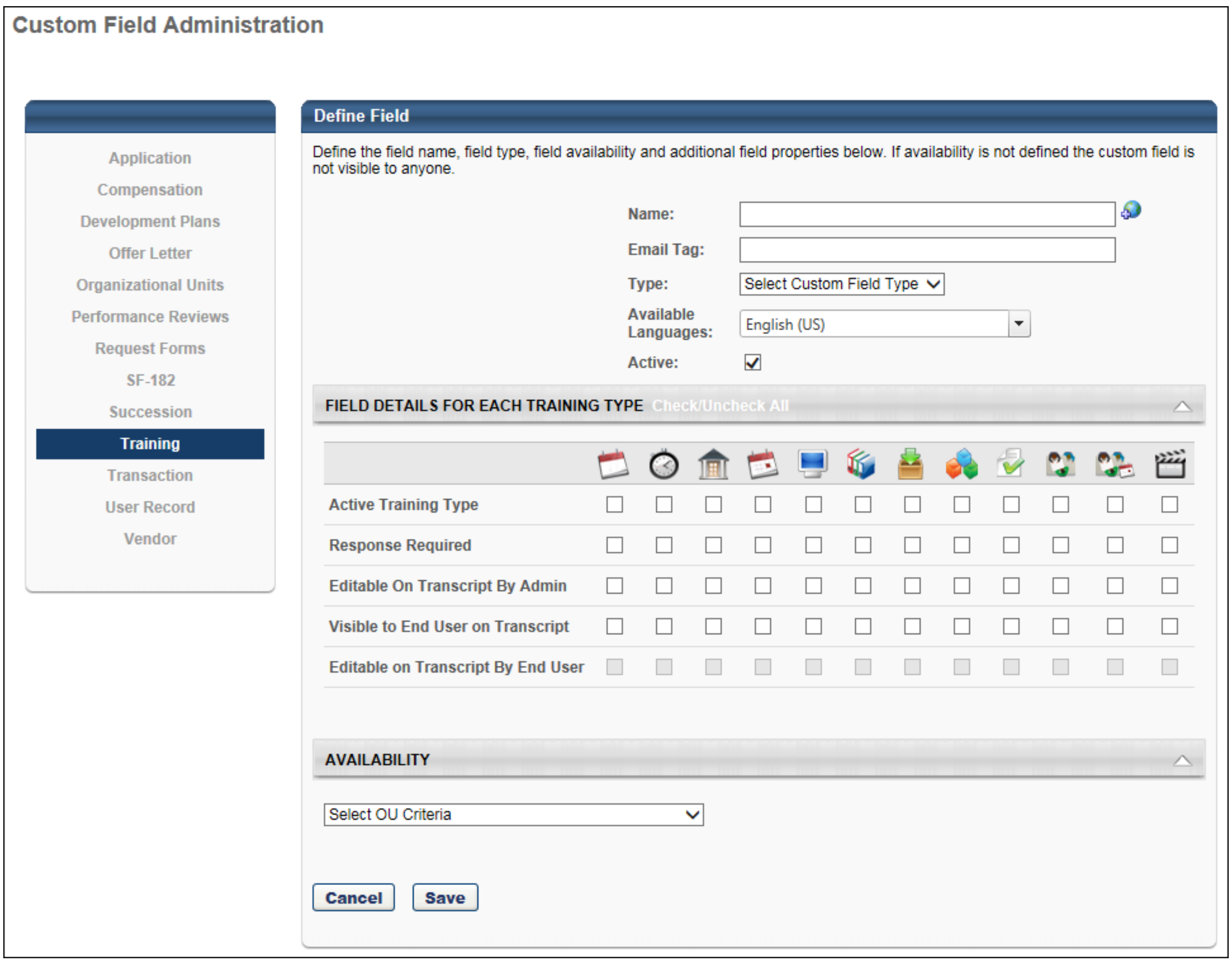
Training Custom Fields - Videos

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

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
Training Custom Fields	Grants ability to create and edit custom fields to be used for one or more learning object types. This is an administrator permission.	Learning - Administration



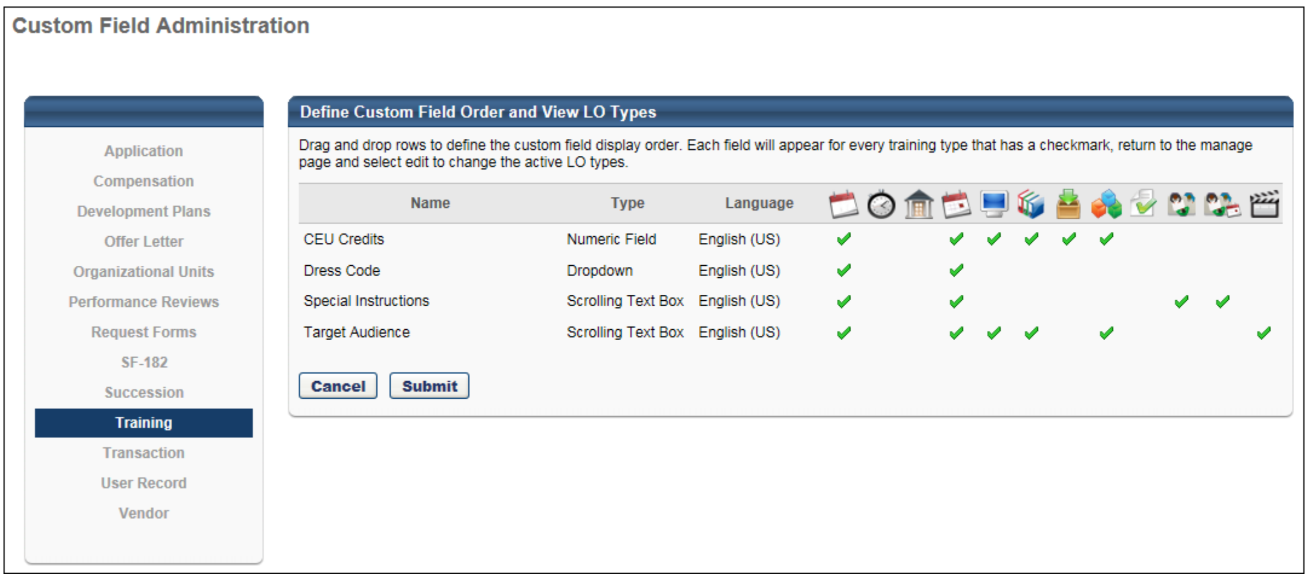
Training Custom Fields - Define Custom Field Order

When defining the display order of existing custom fields and indicating for which type of learning objects (LOs) the custom fields will display, the Video LO type is 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
Training Custom Fields	Grants ability to create and edit custom fields to be used for one or more learning object types. This is an administrator permission.	Learning - Administration



Create/Edit Video LO - General - Custom Fields

When creating or editing a video course, any training custom fields that are enabled for video learning objects (LOs) and available to the administrator appear on the General Information page. The custom fields appear after all standard fields. The custom fields appear in the order defined in Custom Field Administration.

To create a video course, go to **Admin > Tools > Learning > Catalog Management > Videos**. Then, click the **Create a Video Course** link.

Permissions

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Create/Edit Video LO - Confirm - Custom Fields

When creating or editing a video course, any training custom fields that are enabled for video learning objects (LOs) and visible to the administrator appear on the Confirm page. The custom fields appear after all standard fields. The custom fields appear in the order defined in Custom Field Administration.

To create a video course, go to **Admin > Tools > Learning > Catalog Management > Videos**. Then, click the **Create a Video Course** link.

Permissions

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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration

Course Catalog - General - Custom Fields

When editing a video course via Course Catalog, any training custom fields that are enabled for video learning objects (LOs) and available to the administrator appear on the General page. The custom fields appear after all standard fields. The custom fields appear in the order defined in Custom Field Administration.

To access the Course Catalog, go to **Admin > Tools > Learning > Catalog Management > Course Catalog**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	Learning - Administration

Course Catalog - Refine Search - Custom Fields

When searching within Course Catalog and using the Refine Search options, any training custom fields that are enabled for video learning objects (LOs) and available to the user appear in the Refine Search options and can be used to search for video LOs.

Only the following custom field types are supported: numeric, short text, date, and drop down.

To access the Course Catalog, go to **Admin > Tools > Learning > Catalog Management > Course Catalog**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.	Learning - Administration
Course Catalog - View	Grants access to view the learning objects 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, and User's LO Availability. This is an administrator permission.	Learning - Administration

Global Search - Refine Search - Custom Fields

When searching within Global Search and using the Refine Search options, any training custom fields that are enabled for video learning objects (LOs) and available to the user appear in the Refine Search options and can be used to search for video LOs.

To access the Global Search Page, click the magnifying glass icon in the upper-right corner of any system page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Search - Training	Grants ability to search for training via Global Search. If this permission is constrained to a specific OU, then that constraint is automatically applied within Global Search, including search filters and search results. This is an end user permission. The availability of this permission is controlled by a backend setting.	Learning

LO Detail Page - Custom Fields

When viewing the LO Details page for a video learning object (LO), any training custom fields that are enabled for video LOs and available to the user appear on the LO Details page. The custom fields appear after all standard fields. The custom fields appear in the order defined in Custom Field Administration.

If there is no value for the LO, then the field is hidden.

Transcript Details - Custom Fields

When viewing the Transcript Details page for a video learning object (LO), any training custom fields that are enabled for video LOs, visible to end users, and available to the user appear on the Transcript Details page. The custom fields appear after all standard fields. The custom fields appear in the order defined in Custom Field Administration.

If the custom field is configured to be editable by users, then the user can also edit the custom field.

If the custom field is configured to be editable by administrators, then administrators can also edit the custom field.

If there is no value for the LO, and the user has the Display all Training Custom Fields permission, then the empty field is displayed. If there is no value for the LO, and the user does not have the Display all Training Custom Fields permission, then the empty field is hidden.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Display all Training Custom Fields	Enables display of all training custom field values including blank fields when viewing details of training on transcript. Without this permission, the custom field will only appear if it is populated with a value. This is an end user permission.	Learning

Constraints on Track Employees Sections on Standard Reports

With this enhancement, constraints are added to the permissions for the following Track Employees standard reports:

- Records Report
- Session Withdrawal Report
- Training Progress Pie Chart Report
- Training Status Summary Report
- Transcripts Report

Direct Report Constraint

The *Restrict to User's Direct Subordinates* constraint is added to the permissions for all of the above Track Employees reports. This constraint allows administrators to constrain the data that a user can view to only the data for their direct reports. The user would not be able to view their own data with this constraint.

Custom Employee Relationship Constraint

The *Restrict to Employee Relationship* constraint is added to the permissions for all of the above Track Employees reports except the Records Report. This constraint allows administrators to constrain the permission to a user's custom employee relationship. For example, an administrator can select to restrict the Matrix Manager relationship to viewing user data for users who have that Matrix Manager indicated on their user record.

Note: *When the constraint is added to the Training Status Summary Report, indirect subordinates that have a custom employee relationship will appear in the report without the need to select the* **Include Indirect Subordinates** *checkbox.*

Security

The following existing permissions apply to this functionality, and their descriptions will be updated with the final October '15 release to reflect the new constraints:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Transcripts - Manager/Approver Access	Grants access to transcript (training record) screen of those for whom user is designated manager, approver or cost center approver.	Reports - Track Employee

	System administrators can access all user transcripts from this page. Link to this screen appears under Standard Reports/Track Employees. This is a manager/approver permission. This permission can be constrained by Employee Relationship and User's Direct Subordinates. **Note:** *The Employee Relationship constraint allows administrators to constrain the permission to a user’s custom employee relationship. For example, an administrator can select to restrict the Matrix Manager relationship to viewing user data for users who have that Matrix Manager indicated on their user record.* **Note:** *The User's Direct Subordinates constraint allows administrators to constrain the data that a user can view to only the data for their direct reports. The user will not be able to view their own data with this constraint.* **Note:** *By design, for any Track Employees report permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.*	
ILT Session Withdrawal Report - Manager Version	Grants access to Session Withdrawal report for subordinates of the user. The report displays subordinates who registered and later withdrew their registration, including reasons for withdrawal. This is a manager report. This permission can be constrained by Employee Relationship and User's Direct Subordinates. **Note:** *The Employee Relationship constraint allows administrators to constrain the permission to a user’s custom employee relationship. For example, an administrator can select to restrict the Matrix Manager relationship to viewing user*	Reports - Track Employee

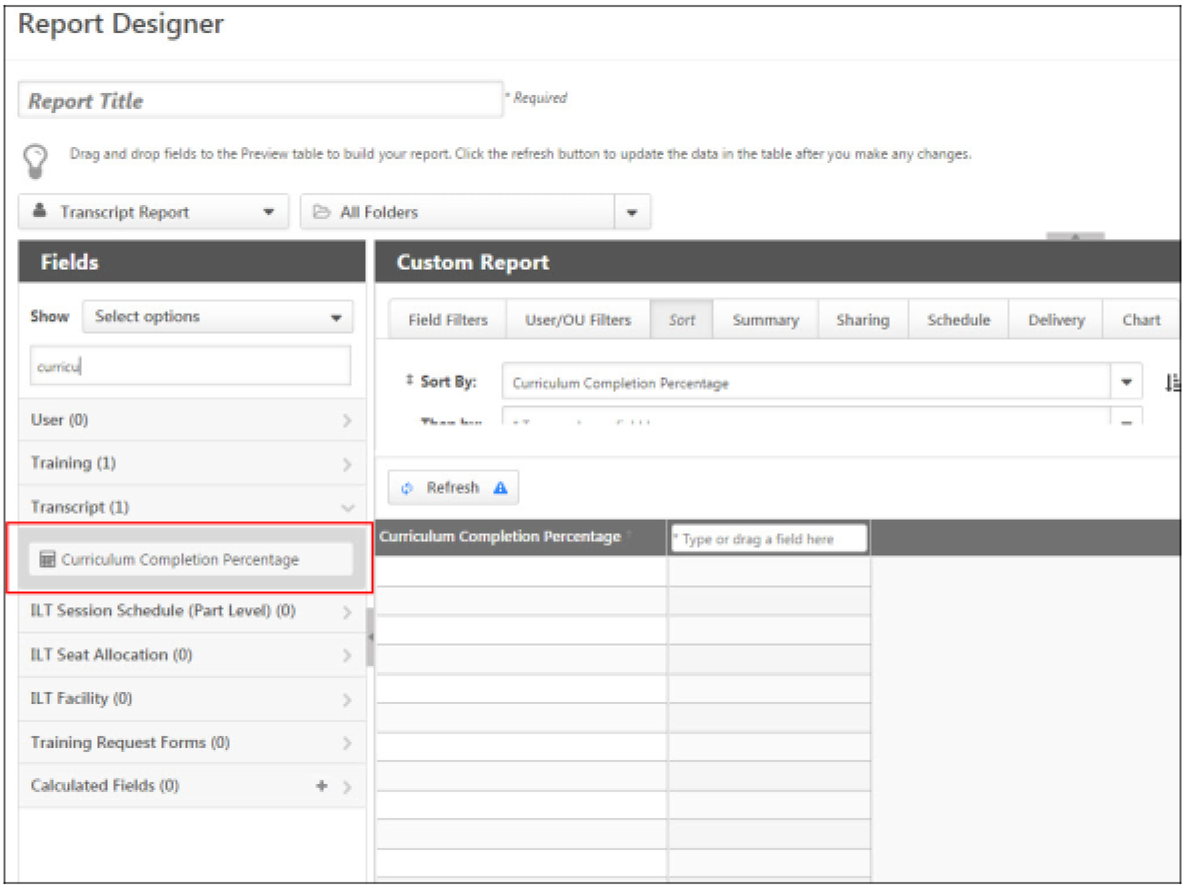
	data for users who have that Matrix Manager indicated on their user record. **Note:** *The User's Direct Subordinates constraint allows administrators to constrain the data that a user can view to only the data for their direct reports. The user will not be able to view their own data with this constraint.* **Note:** *By design, for any Track Employees report permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.*	
Track Employees - Employee Records	Grants access to Employee Records, enabling manager to view basic user and transcript data for a single direct or indirect report. This is a manager permission. This permission can be constrained by User's Direct Subordinates. **Note:** *The User's Direct Subordinates constraint allows administrators to constrain the data that a user can view to only the data for their direct reports. The user will not be able to view their own data with this constraint.* **Note:** *By design, for any Track Employees report permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.*	Reports - Track Employee
Track Employees - Training Progress Pie Chart	Grants access to Employee Training Progress Summary Report, a pie chart report that displays transcript status on a single learning object for a manager's direct reports. This is a manager permission. This permission can be constrained by Employee Relationship and User's Direct Subordinates. **Note:** *The Employee Relationship constraint*	Reports - Track Employee

	allows administrators to constrain the permission to a user’s custom employee relationship. For example, an administrator can select to restrict the Matrix Manager relationship to viewing user data for users who have that Matrix Manager indicated on their user record. **Note:** *The User's Direct Subordinates constraint allows administrators to constrain the data that a user can view to only the data for their direct reports. The user will not be able to view their own data with this constraint.* **Note:** *By design, for any Track Employees report permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.*	
Track Employees - Training Status Summary Report	Grants access to Employee Training Status Summary Report, which displays transcript status of all training for a manager's direct reports, and allows the manager to view the transcript details for any learning object listed on the report. This is a manager permission. This permission can be constrained by Employee Relationship and User's Direct Subordinates. **Note:** *The Employee Relationship constraint allows administrators to constrain the permission to a user’s custom employee relationship. For example, an administrator can select to restrict the Matrix Manager relationship to viewing user data for users who have that Matrix Manager indicated on their user record.* **Note:** *The User's Direct Subordinates constraint allows administrators to constrain the data that a user can view to only the data for their direct reports. The user will not be able to view their own data with this constraint.* **Note:** *By design, for any Track Employees report permission that is included in the Manager*	Reports - Track Employee

	default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.	

Curriculum Completion Percentage in Custom Reports

With this enhancement, a **Curriculum Completion Percentage** field is added to the custom Transcript report to enable reporting on the completion percentage of curricula. The completion percentage for each user is calculated once the user opens the curriculum in the Curricula Player.



Implementation

Upon implementation of this enhancement, for existing curricula, users will need to re-access the Curricula Player for a particular curriculum in order for completion percentage to calculate. For new curricula created after this enhancement, completion percentage will be calculated when the user accesses the curriculum in the Curricula Player.

Use Case

1. Ella wants to report on the progress of students who are taking a particular curriculum so that her customer's account managers can be prepared for conversations with their clients.
2. Ella creates a new custom Transcript report and adds the **Curriculum Percentage Completion** field to the report builder.
3. When Ella views the report output, she can see how much of a curriculum a student has completed based on the students who are registered for a curriculum and have opened the curriculum in the Curricula Player. She also sorts the column by percentage to see which students are at the highest and lowest completion percentage.

Security

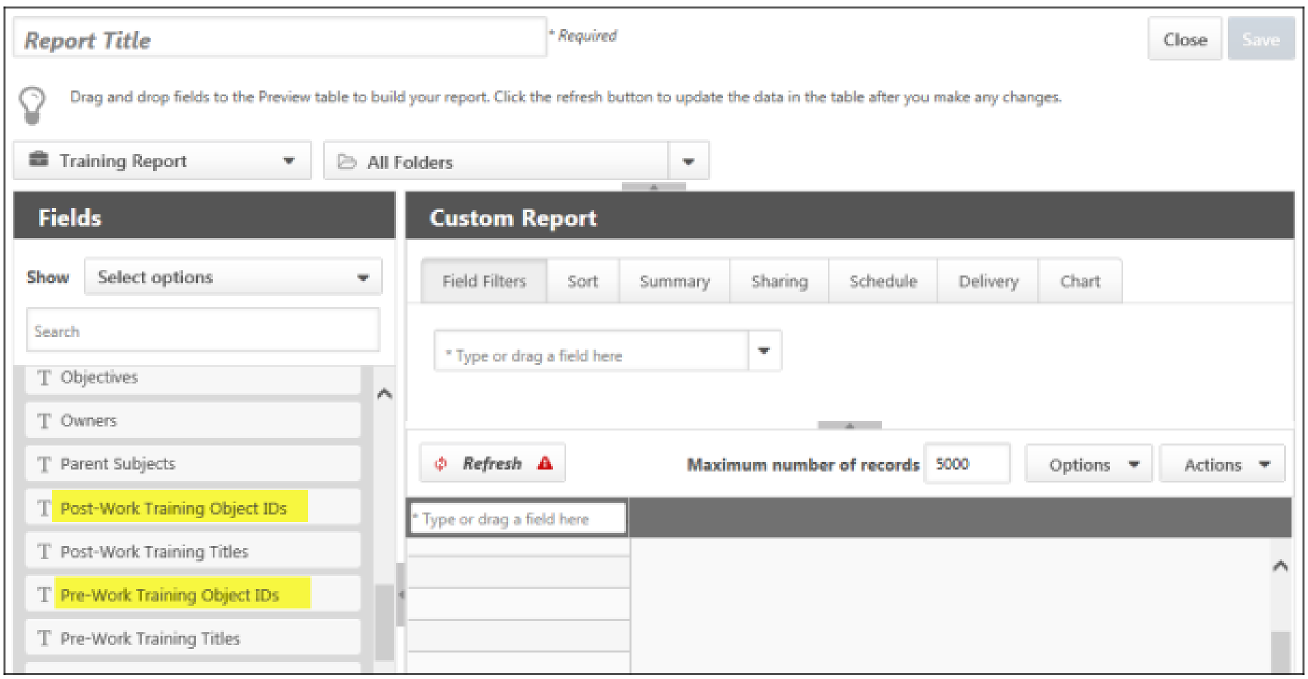
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) reports created by self or shared by others.	Reports - Analytics

Enhanced Post-work and Pre-work Fields

With this enhancement, Post-work and Pre-work fields will now provide more accurate data to be used within custom Training reports. The following changes are made:

- The **Post-Work Training IDs** field is renamed **Post-Work Training Object IDs**. The field displays a comma delimited list of post-work object IDs.
- The **Pre-Work Training IDs** field is renamed **Pre-Work Training Object IDs**. The field displays a comma delimited list of pre-work object IDs.



Security

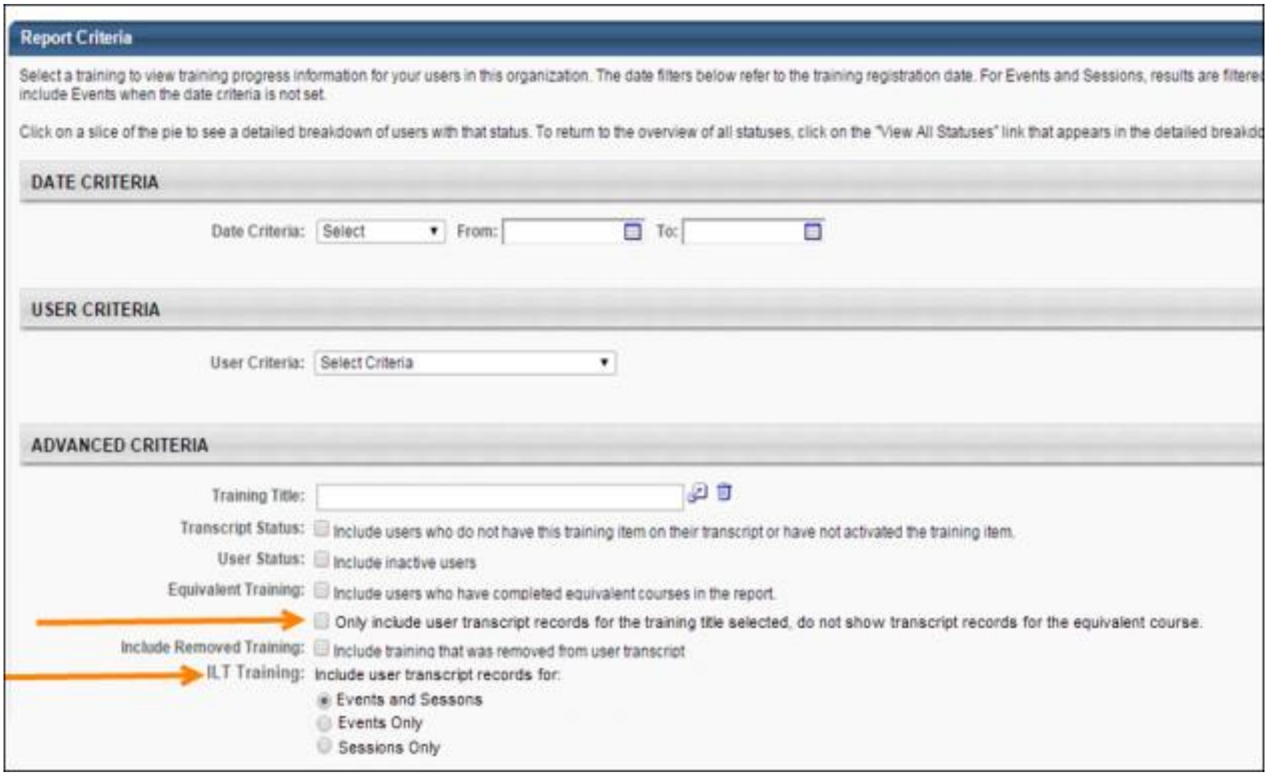
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Training Reports - Create	Grants ability to create and edit Custom Training (Catalog) reports. This permission can be constrained by Provider. **Note:** *When the constraint is set for the permission, users will only be able to view training data for the constrained providers.*	Reports - Analytics
Custom	Grants ability to view results of Custom Training	Reports -

Training Reports - View	(Catalog) reports created by self or shared by others. This permission can be constrained by Provider. **Note:** *When the constraint is set for the permission, users will only be able to view training data for the constrained providers.*	Analytics

Enhanced Training Progress Summary Pie Chart

With this enhancement, the Training Progress Summary Pie Chart and Dashboard are enhanced to add additional options on the Report Criteria Page.



Exclude Events and Sessions

An **ILT Training** field is added to the Advanced Criteria section. This field allows users to exclude events and sessions or exclude events only or sessions only. The following options are available:

- **Events and Sessions** - This option is selected by default. When selected, both transcript records for both events and sessions are included in the report output.
- **Events Only** - When this option is selected, the report output only includes transcript records for events.
- **Sessions Only** - When this option is selected, the report output only includes transcript records for sessions.

Exclude Equivalency Transcript Records

An **Only include user transcript records for the training selected** option is added to the **Equivalent Training** field. When selected, the report does not include the user transcript record for the equivalent course. This option is unselected by default.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Progress Summary Pie Chart Report	Grants access to Training Progress Summary Pie Chart Report, which displays the percentage of users with certain transcript statuses for a particular learning object.	Reports - Training

Provider Constraint on Training Custom Reports

With this enhancement, a *Restrict to Provider* constraint is added to the *Custom Training Reports - Create* and *Custom Training Reports - View* permissions for custom Training reports. When the constraint is set for the permission, users will only be able to view training data for the constrained providers.

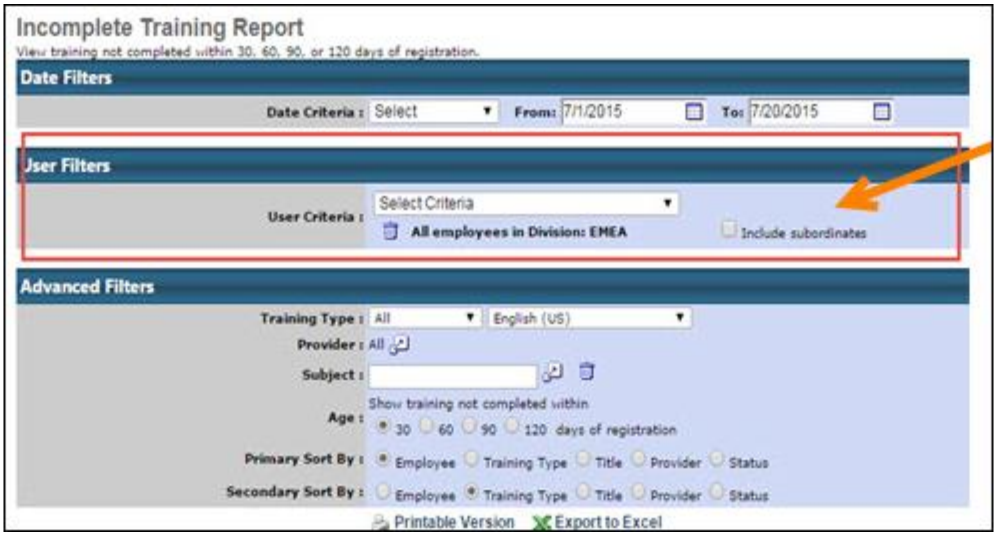
Security

The following existing permissions apply to this functionality, and their descriptions will be updated with the final October '15 release:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Training Reports - Create	Grants ability to create and edit Custom Training (Catalog) reports. This permission can be constrained by Provider. **Note:** *When the constraint is set for the permission, users will only be able to view training data for the constrained providers.*	Reports - Analytics
Custom Training Reports - View	Grants ability to view results of Custom Training (Catalog) reports created by self or shared by others. This permission can be constrained by Provider. **Note:** *When the constraint is set for the permission, users will only be able to view training data for the constrained providers.*	Reports - Analytics

Subordinate on Incomplete Training Standard Reports

With this enhancement, an **Include Subordinates** option is added the User Criteria field on the Incomplete Training Report. When this option is selected, the report output includes user data for the users selected in the User Criteria section, as well as the user's subordinates.



Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Enterprise Incomplete Training Report	Grants access to Incomplete Training Report, which displays training not completed within 30, 60, 90 or 120 days of registration.	Reports - Training

Mobile

Mobile Release Dates

The following table describes when the Cornerstone Mobile® application is updated with each release:

MOBILE PRODUCT	RELEASE DATE TO STAGE	RELEASE DATE TO PRODUCT	DESCRIPTION
iOS	N/A	Upon Final Release	The mobile application for iOS devices
Android	N/A	Upon Final Release	The mobile application for Android devices
Mobile Web	10 days prior to Final Release	Upon Final Release	The mobile web site for all devices

Mobile Launch Curriculum

Mobile Launch Curriculum Overview

Curricula are a large part of bundling and prescribing learning.

With this release, curricula are fully available to view, launch, and complete through the mobile application. The curriculum structure on mobile will follow the same flow and structure as on the desktop version, and every learning object (LO) inside the curriculum that is mobile enabled can be launched from the mobile application.

At least one course inside the curriculum must be enabled for mobile in order for the curriculum to be visible when the Mobile filter is enabled on the Transcript page within the mobile application. That is, all curricula are visible within the mobile application. However, if the Mobile filter is enabled on the Transcript page within the mobile application, then only curricula that contain at least one course that is enabled for mobile will be displayed.

LOs that are enabled for mobile can be launched or marked complete. **Note:** *If the curriculum is configured so that some LOs can only be accessed after another LO is complete, this is enforced within the mobile application.*

LOs that are not enabled for mobile are visible, but only the View Details option is available.

Implementation

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

This functionality is not available to be tested during UAT. This functionality is not available until the latest version of the mobile application is released and then downloaded on October 30.

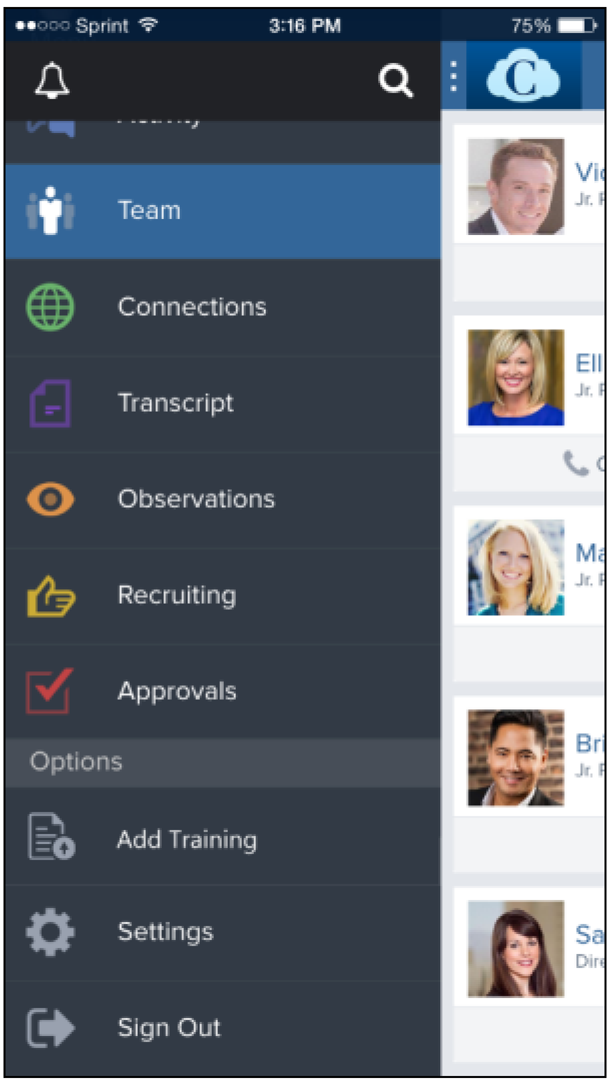
Launch Curriculum

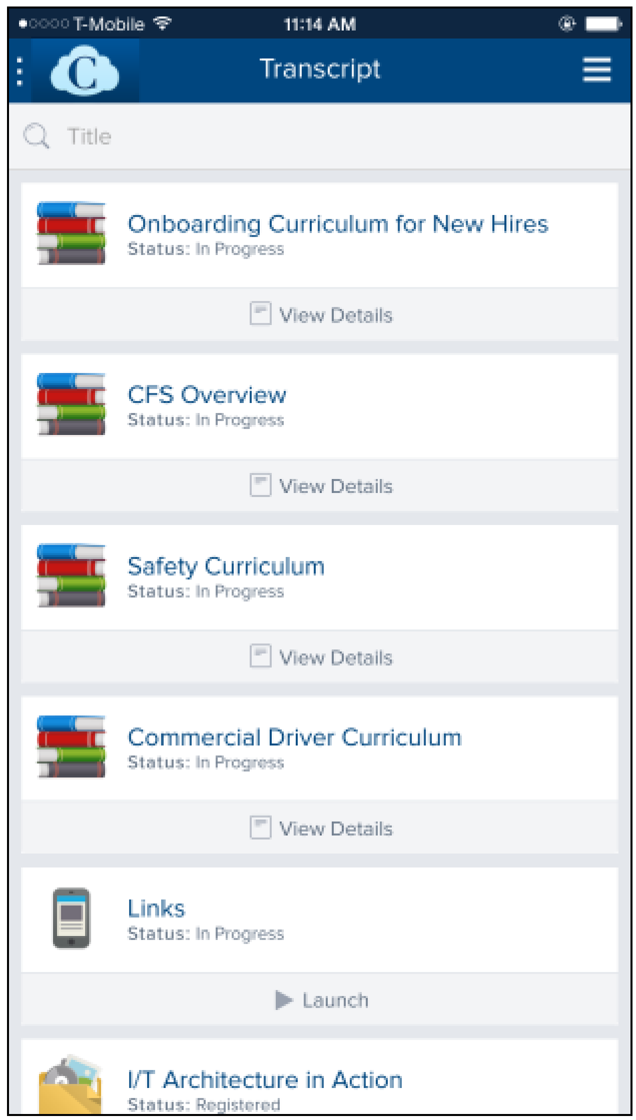
With this enhancement, curriculum learning objects (LOs) can now be viewed and launched from the mobile application.

If the Mobile filter is enabled on the Transcript page within the mobile application, then only curricula that contain at least one course that is enabled for mobile will be displayed.

To launch a curriculum LO, tap the Transcript option from the main menu. This opens the Transcript page.

On the Transcript page, tap the curriculum LO. This opens the Curriculum Overview page. *See* **Curriculum Overview Page** *on* page 302 *for additional information.*



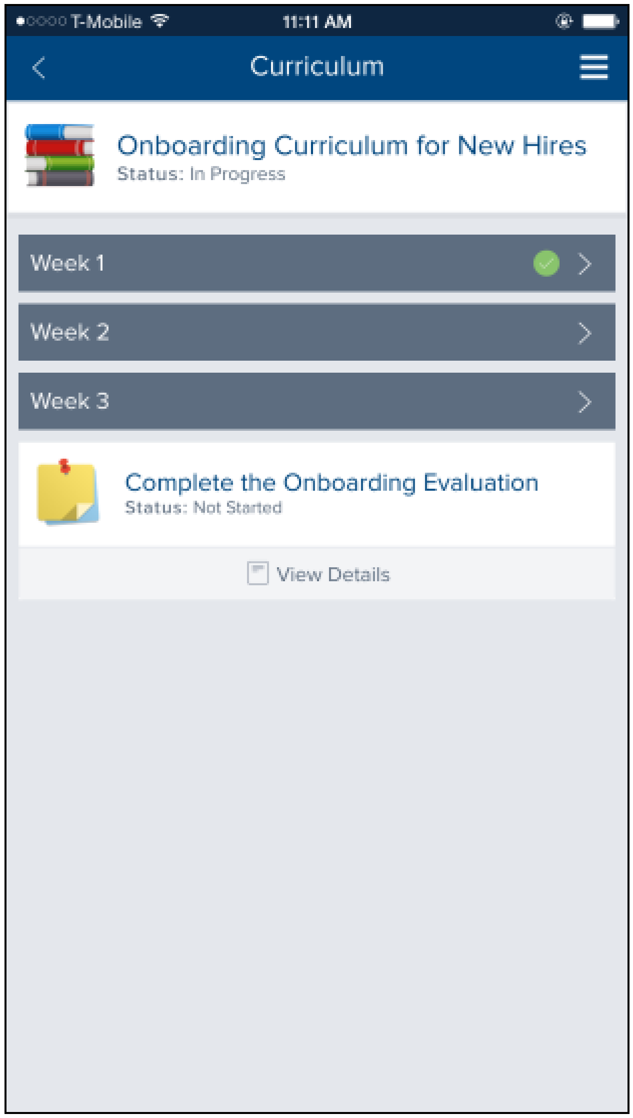


Curriculum Overview Page

The Curriculum Overview page displays all of the sections in the curriculum and any items that are not within a section. If a section is completed, then a green check mark appears to the right of the section name.

To access the Curriculum Overview page, from the Transcript, tap the curriculum.

- To open a section, tap the section bar. This opens the Curriculum Section View page. *See* **Curriculum Section View Page** *on* page 304 *for additional information.*
- Learning objects (LOs) that are enabled for mobile can be launched or marked complete. **Note:** *If the curriculum is configured so that some LOs can only be accessed after another LO is complete, this is enforced within the mobile application.*
    - To launch a LO, tap the **LAUNCH** button.
    - To mark a LO complete, tap the **MARK COMPLETE** button.
- LOs that are not enabled for mobile are visible, but only the View Details option is available.
    - To view the details of the LO, tap the **VIEW DETAILS** button.

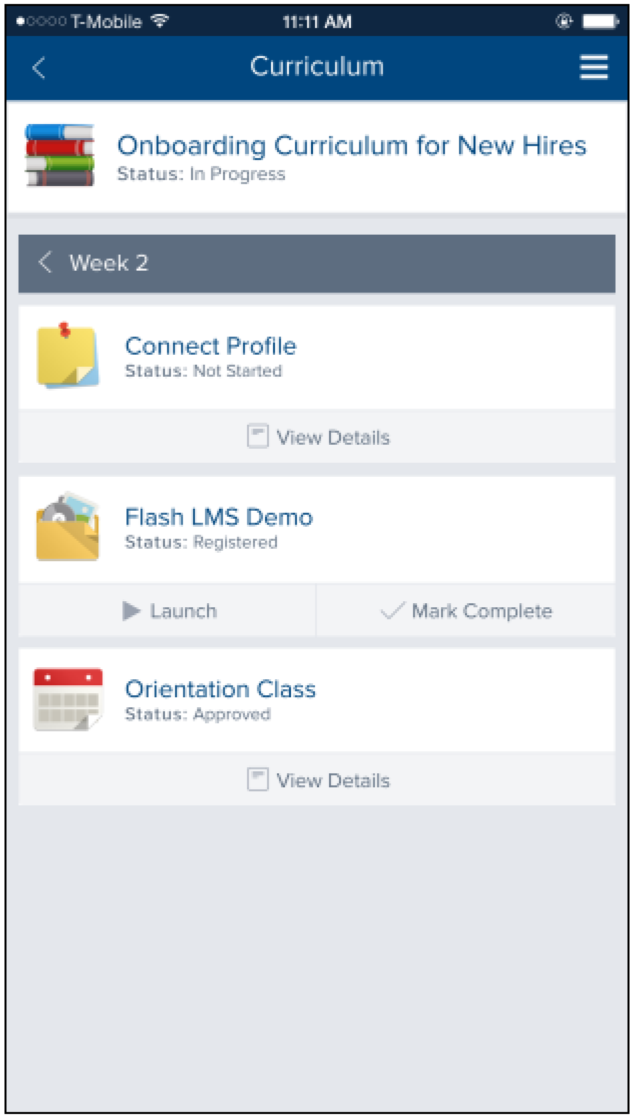

T-Mobile
11:11 AM
Curriculum
Onboarding Curriculum for New Hires
Status: In Progress
Week 1
Week 2
Week 3
Complete the Onboarding Evaluation
Status: Not Started
View Details

Curriculum Section View Page

The Curriculum Section View page displays all of the items within the section and any subsections within the section. If the section is completed, then a green check mark appears to the right of the section name.

To access the Section View page, from the Transcript page, tap the curriculum. Then, tap the section bar.

- To return to the Curriculum Overview page, tap the section bar. *See* **Curriculum Overview Page** *on* page 302 *for additional information.*
- To open a subsection, tap the subsection bar.
- Learning objects (LOs) that are enabled for mobile can be launched or marked complete. **Note:** *If the curriculum is configured so that some LOs can only be accessed after another LO is complete, this is enforced within the mobile application.*
  - To launch a LO, tap the **LAUNCH** button.
  - To mark a LO complete, tap the **MARK COMPLETE** button.
- LOs that are not enabled for mobile are visible, but only the View Details option is available.
  - To view the details of the LO, tap the **VIEW DETAILS** button.


T-Mobile
11:11 AM
Curriculum
Onboarding Curriculum for New Hires
Status: In Progress
Week 2
Connect Profile
Status: Not Started
View Details
Flash LMS Demo
Status: Registered
Launch
Mark Complete
Orientation Class
Status: Approved
View Details

View Curriculum Details

The Curriculum Details page displays an overview of the curriculum, including status, duration, description, and due date.

To view the Curriculum Details page, from the Transcript page, tap the **VIEW DETAILS** button.

Performance

Competency Administration Enhancements

Competency Administration Enhancements

With this enhancement, competency administration is enhanced to better enable administrators to manage competencies. Administrators can now copy competencies, conveniently edit competency categories, and filter competencies by category type.

Implementation

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

Security

The following existing permission applies to this functionality:

PERMISSION NAME	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	Grants ability to create, copy, edit, view, and delete competencies in the Competency Bank. This permission cannot be constrained. This is an administrator permission.	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

Copy Competencies

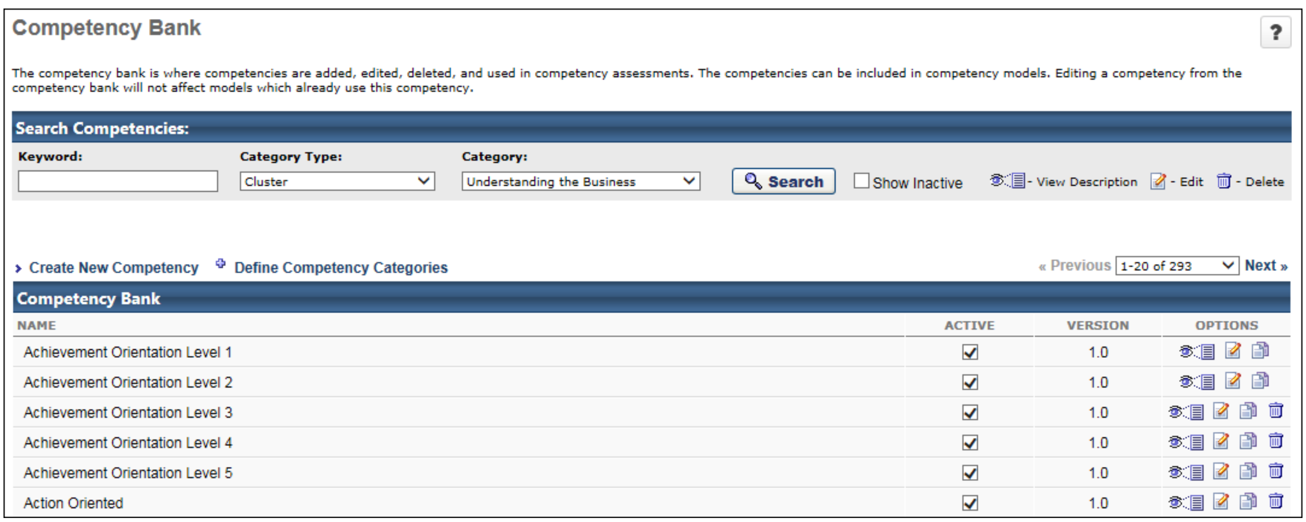
With this enhancement, administrators can now copy competencies within the Competency Bank.

To copy a competency, go to **Admin > Tools > Performance Management > Competency Bank**. Then, click the Copy icon to the right of the appropriate competency.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Competency Assessment Bank Admin - Manage	Grants ability to create, copy, edit, view, and delete competencies in the Competency Bank. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

Administrators who have the Competency Assessment Bank Admin - Manage permission are able to copy existing competencies. This option is available for all existing competencies.



Edit Competency Categories

Prior to this enhancement, administrators were not able to edit a competency category after the competency was created.

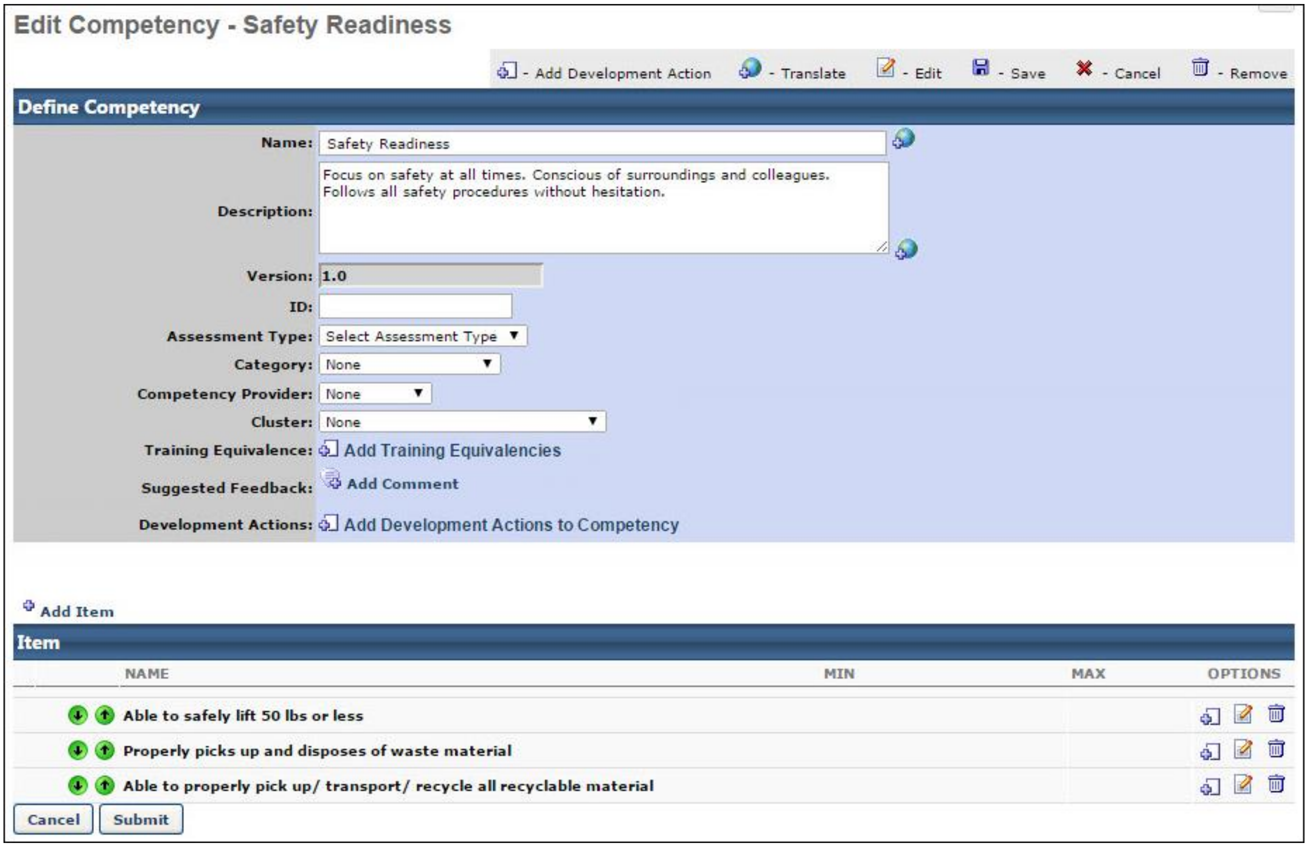
With this enhancement, administrators can now edit a competency's category after the competency is created as long as the competency is not currently being used in the system.

To edit a competency, go to **Admin > Tools > Performance Management > Competency Bank**. Then, click the Edit icon to the right of the appropriate competency.

Permissions

PERMISSION NAME	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	Grants ability to create, copy, edit, view, and delete competencies in the Competency Bank. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

Selecting a new competency category does not create a new version of the competency. If a competency category is changed, the competency model grouping is updated.


Edit Competency - Safety Readiness
- Add Development Action
- Translate
- Edit
- Save
- Cancel
- Remove
Define Competency
Name:
Safety Readiness
Description:
Focus on safety at all times. Conscious of surroundings and colleagues.
Follows all safety procedures without hesitation.
Version:
1.0
ID:
Assessment Type:
Select Assessment Type
Category:
None
Competency Provider:
None
Cluster:
None
Training Equivalence:
Add Training Equivalencies
Suggested Feedback:
Add Comment
Development Actions:
Add Development Actions to Competency
Add Item
Item
NAME
MIN
MAX
OPTIONS
Able to safely lift 50 lbs or less
Properly picks up and disposes of waste material
Able to properly pick up/ transport/ recycle all recyclable material
Cancel
Submit

Competency Search Filtering

When searching for a competency via the Competency Bank page or the Search Competencies pop-up, administrators now have the ability to filter search results by category type and category.

The administrator Search Competencies pop-up is available in the following areas of the system:

- Competency Model - Add Competency
- Role - Add Competency

The user Search Competencies pop-up is available in the following areas of the system:

- Performance Reviews - Select Competencies
- Evidence Collection - Select Competencies
- External Training - Select Competencies

To access the Competency Bank page, go to **Admin > Tools > Performance Management > Competency Bank**.

Permissions

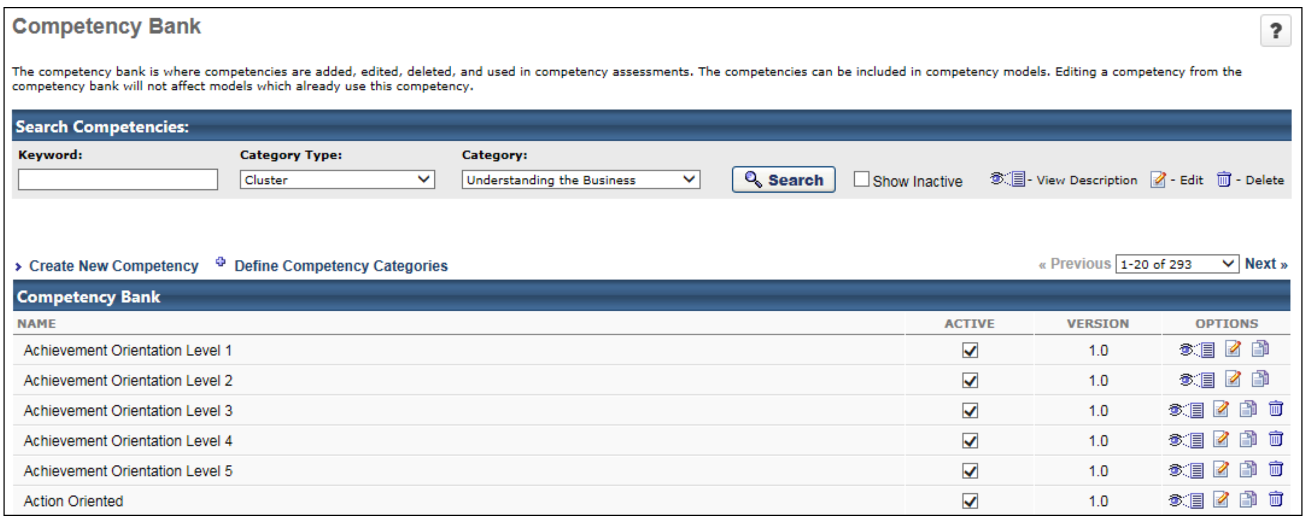
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Competency Assessment Bank Admin - Edit	Grants ability to edit competencies in the Competency Bank. Administrators can only edit a competency if they have this permission and are also included in the Admin Visibility settings for the competency. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Competency Assessment Bank Admin - Manage	Grants ability to create, copy, edit, view, and delete competencies in the Competency Bank. This permission cannot be constrained. This is an administrator permission.	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	Performance - Administration

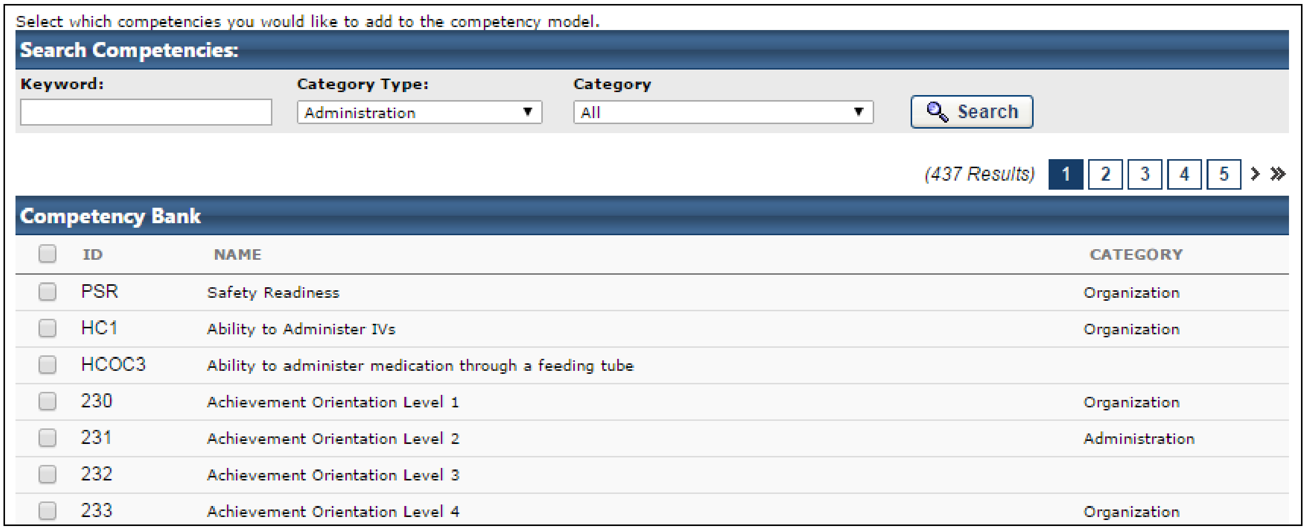
	is an administrator permission.	

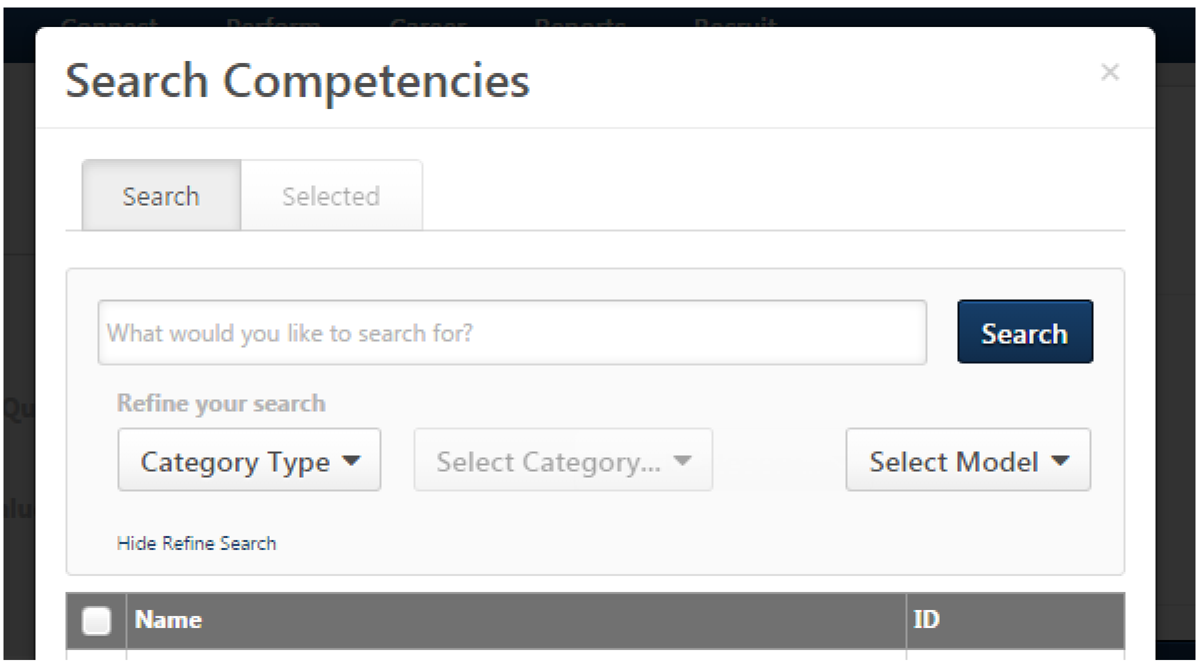
The following filters are now available on the Competency Bank page and within the Search Competencies pop-up:

- **Category Type** - This drop-down determines which options are available in the **Category** drop-down. Select the category type by which you are filtering competencies.
- **Category** - This drop-down is disabled until a category type is selected from the **Category Type** drop-down. Once a category type is selected, all available categories from the selected category type are displayed. Select the appropriate category. When the **SEARCH** button is clicked, only competencies from the selected competency category are displayed. If no category is selected and the **SEARCH** button is clicked, only competencies that have any category set for the selected category type are displayed.

On the Search Competencies pop-up, the **Group By** drop-down is removed.




Select which competencies you would like to add to the competency model.
Search Competencies:
Keyword:
Category Type:
Administration
Category
All
Search
(437 Results)
1
2
3
4
5
Competency Bank
ID
NAME
CATEGORY
PSR
Safety Readiness
Organization
HC1
Ability to Administer IVs
Organization
HCOC3
Ability to administer medication through a feeding tube
230
Achievement Orientation Level 1
Organization
231
Achievement Orientation Level 2
Administration
232
Achievement Orientation Level 3
233
Achievement Orientation Level 4
Organization


Search Competencies
Search
Selected
What would you like to search for?
Search
Refine your search
Category Type
Select Category...
Select Model
Hide Refine Search
Name
ID

Edit Visibility in Partial Edit Mode

With this enhancement, when a performance review task is in Partial Edit mode, administrators can make changes to the visibility of the task. This includes Overall Task Visibility, the Rating and Comments visibility options for all relations, and the Overall Rating option. When visibility changes are made to a task, the visibility changes are immediately reflected in the performance review. This enables administrators to modify visibility settings without needing to contact Global Product Support (GPS).

This applies to standard and off-cycle performance review tasks.

Implementation

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

Email Digest - Include Reviewee as Recipient

When creating a Performance Review Step Assigned section for an email digest, administrators can now select Reviewee as a recipient. This enables a recipient to receive a single email digest that includes a notification for tasks in which they are completing a self review and tasks in which they are reviewing another person.

Implementation

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

Email Digest - Performance Review Step Due Section

Email Digest - Performance Review Step Due Section

Prior to the introduction of email digests, individual emails were sent to recipients based on defined email triggers.

With the July 2015 Release, email digests were introduced. 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.

With this enhancement, a new email digest section is available for performance review steps. This section notifies a recipient of all performance review steps that are becoming due within the defined time frame. This enhancement reduces the number of emails a user receives and lowers the chance that an email notification is missed.

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 Due section. This section is configured to notify users of all of the performance review steps that are becoming due within the defined time frame.

Considerations

- Specific review task or review step reminders are currently not supported by the Email Digest functionality.
- 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, Live, and Pilot portals for all organizations using the Performance module.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

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
Email Digest Administration - View	Grants ability to view email digests. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

Email Digest - Add Section

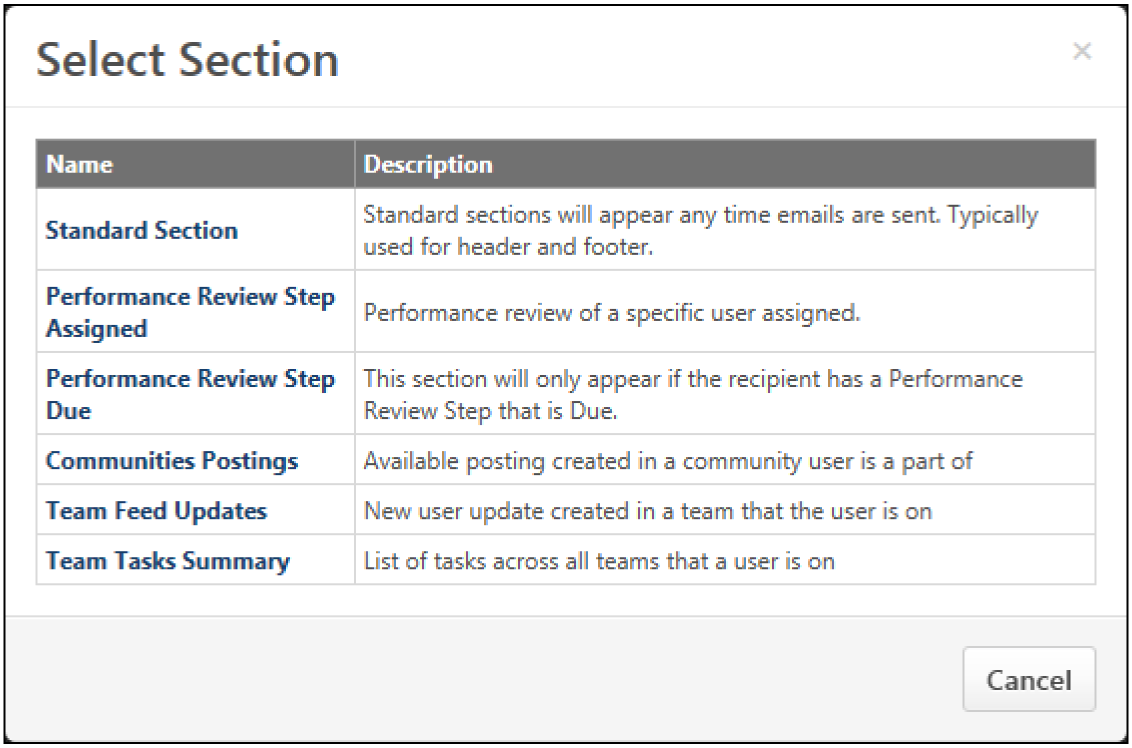
When adding a section to an email digest, the following email digest section is now available:

- Performance Review Step Due - This dynamic section is intended to alert recipients that there is one or more performance review steps that are due. This dynamic section can be configured to display the details of each new performance review step that is due. If a user does not have any performance review steps that are due based on the section's reminder settings, then this section is not included in the email digest for the user. *See* **Performance Review Step Due Section** *on* page 323 *for additional information.*

To add a section to an email digest, click the **ADD SECTION** button in the *Sections* section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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


Select Section

Name	Description
Standard Section	Standard sections will appear any time emails are sent. Typically used for header and footer.
Performance Review Step Assigned	Performance review of a specific user assigned.
Performance Review Step Due	This section will only appear if the recipient has a Performance Review Step that is Due.
Communities Postings	Available posting created in a community user is a part of
Team Feed Updates	New user update created in a team that the user is on
Team Tasks Summary	List of tasks across all teams that a user is on

Cancel

Performance Review Step Due Section

This dynamic section is intended to alert recipients that there is one or more performance review steps that are due. This dynamic section can be configured to display the details of each new performance review step that is due. If a user does not have any performance review steps that are due based on the section's reminder settings, then this section is not included in the email digest for the user.

Send Reminder

This setting enables administrators to determine the threshold at which a review step that is due will be included in this email digest section. For example, if the email digest is configured to be sent weekly and the Performance Review Step Due section is configured to send a reminder two weeks before the step is due, then each week the system determines which review steps have a due date that is two weeks from the email digest period. **Note:** *If the reminder is set to "0 days before," then the email digest will be sent on the day the step is due.*

Because email digests can be sent at larger intervals (e.g., weekly or monthly), the email digest will likely not send the reminder exactly on the selected reminder date.

The reminder time units (i.e., days, weeks, or months) automatically match the frequency selection of the email digest (i.e., daily, weekly, or monthly). If the email digest is sent weekly, then the reminder setting is measured in weeks.

A Performance Review Step Due section will only send one reminder for a performance review step. For example, if the reminder is set for 3 weeks, then the section will send a reminder when the due date is three weeks away. In order to configure multiple reminders for the same performance review step, multiple instances of the Performance Review Step Due section should be added to the email digest with different reminder settings.

Section Send To Options

When configuring the **Send To** option for a Performance Review Step Due 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 Due section, the following tags are available:

- {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.
- {STEP.DUE.SUMMARY} - This displays a formatted summary of each performance review step that is due. Each summary contains the Review Step Display Title, Review Link, and Review Due Date. The Summary tag can be used in place of a custom list because it provides a summary of each review step. 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}
- {LIST.BEGIN} - *See the Repeater Tags section below.*
- {LIST.END} - *See the Repeater Tags section below.*
- {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.

Repeater Tags

Within a Performance Review Step Due section, the STEP.DUE.SUMMARY tag can be used to display a formatted summary of each performance review step that is due based on the section's reminder settings. However, if this tag is not used, administrators can use repeater tags to repeat information for each item in the email digest.

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.

Sample Section Text

The following is an example of how a Performance Review Step Due section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

You have the following performance review tasks coming due:

{STEP.DUE.SUMMARY}

Please log in and complete these review tasks at your earliest convenience.

Email Digest - View Log

Email digests combine emails so that one notice goes out on daily, weekly, or monthly intervals instead of each time they are triggered. Email digests are now more transparent as administrators can generate a log for digests to verify which emails were sent and what activities were included or not included in a digest.

When viewing the Email Digest Management page, a View Log option is now available from the Actions drop-down menu. When this option is selected, a .csv file is generated. The email digest log contains the following information for each time the email digest was sent in the past 30 days:

- Email Address - This displays the email address of the intended email digest recipient.
- Username - This displays the username of the intended email digest recipient.
- Status - This displays the status of the delivery. If an error was received, then the cause of the error is displayed. For example, "User has no associated email address" may be displayed.
- Time Sent - This is the time at which the email processor sent or attempted to send the email. This is displayed in the user's time zone.

Considerations

- 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, Live, and Pilot portals for all organizations using the Performance module or New Connect.

Review Goal Planning - Goal Weight Validation

When configuring a Goal Planning performance review section, administrators have the option to include a validation for goal weights in order ensure that all goal weights add up to 100%. This is done by selecting the **Include goal weight validation** option for the Goal Planning performance review section. If this option is selected and a user completes a Goal Planning section in which the total goal weight is not 100%, then a warning message is displayed to inform the user. This functionality serves as a warning to the user. However, the user is still able to submit the review section if the total goal weight is not 100%.

Prior to this enhancement, any goals that were in Draft status or created within the performance review were not included in the goal weight validation. This made it difficult for users to have the goal weights add up to 100%.

With this enhancement, any goals that are in Draft status or created within the performance review are now considered when validating that all goal weights add up to 100%. This enables users to accurately ensure that the total weight of all of their goals is equal to 100%.

Implementation

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

Performance Review Web Service (REST)

With this enhancement, a new Performance Review web service is now available. This web service enables administrators to extract performance review ratings, goals, and competency data that is associated with a performance review task within a specified time period. In order to use this service, administrators need to send a performance review task name or task ID. The web service returns records for all users that are assigned the task. The web service also includes each rating for each review step as well as comments.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
Task Name	String	This is the name of the performance review task. This is required unless a Task ID is provided.
Task ID	String	This is the ID of the performance review task. This is required unless a Task Name is provided.
User ID	String	This is the User ID of the user for whom the service is providing performance review data. This can be the User ID, Username, or email address for the user. This is optional. If this value is not provided then the service returns data for all users within the task.
Modification Date Range (Start Date)	Datetime	YYYY-MM-DD. This is optional. This is the start date for the modification range. The service returns modification data that was submitted within the modification range.
Modification Date Range (End Date)	Datetime	YYYY-MM-DD. This is optional. This is the end date for the modification range. The service returns modification data that was submitted within the modification range.
Page Number	Int	This determines the number of records that are included per page. This is optional.

Output Parameters

This web service has the following output parameters:

DATA FIELD	TYPE	DESCRIPTION
User ID	String	This is the User ID of the user for whom the service

DATA FIELD	TYPE	DESCRIPTION
		is providing performance review data. This can be the User ID, Username, or email address for the user.
Status	String	This is the current status of the user's performance review task.
Raw Score	Float	This is the raw performance review score for the user.
Calibrated Score	Float	This is the calibrated performance review score for the user.
Employee Overall Rating	Float	This is the overall rating from the employee.
Manager Overall Rating	Float	This is the overall rating from the manager.
Score Description	String	This is the text that describes the rating score
Employee Overall Comments	String	This is the employee's overall comments.
Manager Overall Comments	String	This is the manager's overall comments.
Employee Signature	String	This is the employee's signature text.
Employee Signature Date	Date	This is the date on which the employee signed the review.
Manager Signature	String	This is the manager's signature text.
Manager Signature Date	Date	This is the date on which the manager signed the review.
Review Period Start Date	Date	This is the user's review period start date.
Review Period End Date	Date	This is the user's review period end date.
Completion Date	Date	This is the date on which the last step of the review was completed.
Modifications Date	Date	This is the date on which a modification was made.
Goal Title	String	This is the goal title.

DATA FIELD	TYPE	DESCRIPTION
Goal Count	Numeric	This is the goal order.
Goal ID	Int	This is a unique identifier for the goal.
Goal Perspective	String	This is the goal perspective.
Employee Goal Rating	Float	This is the goal rating that is provided by the employee.
Manager Goal Rating	Float	This is the goal rating that is provided by the manager.
Competency Name	String	This is the title of the competency.
Employee Competency Rating	Float	This is the competency rating that is provided by the employee.
Manager Competency Rating	Float	This is the competency rating that is provided by the employee.

Implementation

If you have purchased Web Services usage, but need access to this specific one, please contact CSOD via a GPS case to enable.

If you have not purchased Web Services at all, please contact Sales or Client Executive to purchase.

Performance Reviews Draft Data Visibility

Performance Reviews Draft Data Visibility

Prior to this enhancement, when a reviewer saved their responses within a performance review step but did not submit the performance review step, these responses were immediately visible to other parts of the system. Reviewers who were completing parallel steps could see the saved comments and ratings of other reviewers prior to the other reviewer submitting the step. For example, if a user is completing a Self review that is completed in parallel with a Manager review and the user saves their review, those saved ratings and comments would immediately be visible to the manager. Also, the saved ratings and comments were available via reports.

With this enhancement, any ratings and comments that are saved within a performance review prior to submitting the performance review step are not visible to parallel steps or reports. Ratings and comments are not visible until the performance review step is submitted or is completed due to automatic workflows such as the performance review task being past due. This enables reviewers to privately save their comments and ratings and later return to the review step to finalize the assessment.

Upon release, this functionality is the default behavior and it applies to all performance review tasks, including in progress tasks, offline reviews, and batch ratings.

Use Cases

1. A user is completing a self review and opens the review task.
2. The user updates ratings and adds comments. Then, the user saves the task with the intention of returning to the task to finalize their comments and ratings prior to submitting the review.
3. The user's manager is completing a review step in parallel to the user's self review, and the manager opens the review task.
4. The manager does not see any of the user's saved comments from their self review because the user has not yet submitted their task.
5. When generating a Performance Review report, the user's saved, unsubmitted ratings and comments are not visible.

Considerations

The following performance review sections are not impacted by this enhancement:

- Review Based Competency Assessments
- Development Plan Section
- Evidence Collection Section

Implementation

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

Upon release, this functionality is the default behavior and it applies to all performance review tasks, including in progress tasks, offline reviews, and batch ratings.

Performance Review Data Workflow

With this enhancement, any ratings, comments, and weights that are saved within a performance review prior to submitting the performance review step are not visible to parallel steps or reports. The following rules determine when ratings, comments, and weights are and are not finalized.

Any saved responses are automatically finalized when the performance review step is no longer active. This occurs in the following scenarios:

- The reviewer submits the performance review step.
- The review task becomes past due.
- The performance review step is locked and no more submissions are allowed.
- The performance review step is advanced by an administrator.
- The performance review step is submitted via Bulk Sign-off when all sections are completed.

If multiple submissions are allowed, the following rules apply:

- Edits that are made after the step is submitted remain in draft until the step is submitted again.
- Any unsubmitted edits that are made after the step is submitted are not automatically finalized when the performance review step is no longer active.
- When edits are made after the step is submitted, a notification banner appears at the top of every section of the review step until the step is submitted again. This banner indicates that the latest changes have not been submitted and they will not be finalized until the step is submitted.

If review steps are reopened, the following rules apply:

- Edits that are made in a reopened step remain in draft until the step is submitted again.
- Any unsubmitted edits that are made in a reopened step are not automatically finalized when the performance review step is no longer active.
- When edits are made in a reopened step, a notification banner appears at the top of every section of the review step until the step is submitted. This banner indicates that the latest changes have not been submitted and they will not be finalized until the step is submitted.
- As with existing behavior, if any later reviewers entered or edited comments, ratings, weights, or fields, then the reopened step displays the updated information if they are visible to the reviewer.

If the review step is the final step in the review, the following rules apply:

- If the final step is locked, then all comments and ratings are finalized when the step becomes past due.
- If the final step is not locked, then all comments and ratings are finalized at the task end date.

Reviewers who are completing parallel review steps cannot view which goals or competencies are selected for goal and competency ratings. This is true regardless of whether the parallel step is submitted.

Sign-offs and signatures are only committed when the review step is submitted.

Performance Review Task

With this enhancement, any ratings, comments, and weights that are saved within a performance review prior to submitting the performance review step are not visible to parallel performance review steps. Ratings, comments, and weights are not visible until the performance review step is submitted or is completed due to automatic workflows such as the performance review task being past due.

If multiple submissions are allowed and edits are made after the step is submitted or if edits are made in a reopened step, a notification banner appears at the top of every section of the review step until the step is submitted again. This banner indicates that the latest changes have not been submitted and they will not be finalized until the step is submitted.

See **Performance Review Data Workflow** *on* page 334 *for additional information.*

Performance Review PDF

With this enhancement, any ratings, comments, and weights that are saved within a performance review prior to submitting the performance review step are not visible in the performance review PDF. Ratings, comments, weights are not visible until the performance review step is submitted or is completed due to automatic workflows such as the performance review task being past due.

The following rules apply when viewing a performance review PDF:

- Reviewer views Reviewee Version - When a reviewer who is not the reviewee views the reviewee version, only committed data is included in the PDF.
- Reviewer views Reviewee Version as Reviewee - When a reviewer is also the reviewee and they view the reviewee version, the following occurs:
  - Uncommitted data is included in the PDF prior to submission.
  - Committed data is included in the PDF after submission.
  - If multiple submissions are allowed or if a step is reopened and edits are made after the step is submitted, a notification banner appears at the top of the PDF until the step is submitted again. This banner indicates that the latest changes have not been submitted and they will not be finalized until the step is submitted.
- View Manager Version - When any user views the manager version, only committed data is included in the PDF.
- View Performance Review PDF - When any user views the performance review PDF from outside of the performance review, only committed data is included in the PDF.
- View Performance Review PDF as Co-planner - If a co-planner views the performance review PDF, they can view any uncommitted data from all co-planners of the step. Either co-planner can submit the step, which finalizes all co-planner data. This visibility enables all co-planners for a step to view what is being submitted.

These rules apply to PDFs that utilize the old user interface (UI) or new UI.

A performance review PDF can be viewed in the following areas of the system:

- Snapshot > Reviews
- My Reviews
- Performance Review Task
- My Team
- Scheduled Tasks
- Reports

See **Performance Review Data Workflow** *on* page 334 *for additional information.*

Batch Ratings

With this enhancement, any ratings, comments, and weights that are automatically saved while batch rating a performance review step are uncommitted and are not visible to parallel performance review steps or in reports. Ratings, comments, and weights are not committed until the performance review step is submitted or is completed due to automatic workflows such as the performance review task being past due.

See **Performance Review Data Workflow** *on* page 334 *for additional information.*

Offline Reviews

With this enhancement, any uploaded data is uncommitted and is not visible to parallel performance review steps or in reports. Ratings, comments, and weights are not committed until the performance review step is submitted or is completed due to automatic workflows such as the performance review task being past due.

See **Performance Review Data Workflow** *on* page 334 *for additional information.*

Performance Reviews Redesign Auto-upgrade - In Progress Tasks

With the June 2014 release, Performance Reviews were redesigned so that all employees experience a more intuitive, simple, and transparent performance review. The redesign features all previously available sections, spell-check functionality, goal comments and attachments, the ability to add a Development Plan section, and the ability to configure star ratings. The redesigned functionality also includes redesigned PDF printouts for a seamless process.

With the May 2015 release, all new performance review tasks were upgraded to the Performance Review redesign.

With this enhancement, all In Progress and off-cycle performance review tasks are automatically upgraded with the new Performance Review redesign.

- Security roles, permissions, and navigation pages are not impacted by the auto-upgrade.

Considerations

Existing performance review PDFs are upgraded to the new PDF redesign. It is recommended to configure the PDF layout prior to the upgrade.

Redesigned performance review tasks utilize a more secure HTML Whitelist, which limits which HTML tags are displayed within a review. Incompatible HTML tags are rendered as text. Any existing performance review tasks should be tested before they are assigned to users.

Internet Explorer 7 and Internet Explorer 7 Compatibility Mode are no longer supported. Users must be using Internet Explorer 8 or greater.

Implementation

With this release, all portals are automatically upgraded with the new Performance Reviews redesign for all in progress and off-cycle performance review tasks.

Performance Security Updates

With this enhancement, additional security is added to the Performance module.

Implementation

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

Security

The following new permissions apply to this functionality, and they are added to the administrator and default roles within the system:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Observation Checklist User - Manage Pending Checklists	Grants ability to access the Pending Checklists page and manage pending checklist approvals. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Observation Checklist User - View Checklist	Grants ability to access the My Checklists page and the Checklist Details page. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

The Observation Checklist - View permission is renamed and is now titled Observation Checklist Admin - View. The permission title will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Observation Checklist Admin - View	Grants access to view observation checklists. This permission also enables user to see progress of all users assigned to a given checklist. This is an administrator permission.	Performance - Administration

The Observation Checklist - Manage permission is renamed and is now titled Observation Checklist Admin - Manage. The permission title will be updated when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

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

Platform

Eggshell Display Theme - Extended

Eggshell Display Theme - Extended

Prior to this enhancement, only the *Contemporary - Extended* navigation theme fully supported WCAG (Web Content Accessibility Guidelines) and 508 compliance standards and was the only navigation theme that offered an ideal mobile (touch) friendly experience.

With this enhancement, a new *Eggshell - Extended* navigation theme supports WCAG and 508 compliance standards and provides an improved experience on mobile devices. The new navigation theme will have the same appearance of the current Eggshell theme.

With the navigation enhancements, Cornerstone can be extended to serve more users and more devices. With these improvements, however, the functionality of the navigation bars does change slightly. When the *Eggshell - Extended* theme is enabled, clicking or tapping the navigation tab does not open the first sublink in the tab. Instead, clicking or tapping the navigation tab will open the tab to display all of the sublinks. The navigation tabs will wrap when the number of tabs exceeds the width of the browser, which ensures all tabs are always visible. The navigation experience remains the same for users when hovering over a tab with a mouse, but the experience is improved for users who are applying a screen reader. Additionally, for compliance, users can click the "Tab" key to navigate between navigation tabs, which was previously not supported.

Note: *WCAG/508 accessibility standards allow users to navigate between navigation tabs using the Tab key on their keyboard, as well as access the sub-navigation menu for each tab and navigate between the available links using the Tab key on their keyboard.*

Use Cases

- Robert accesses his organization's portal using a screen reader to browse for training. The **Browse for Training** link is the second link for his portal on the Learning navigation tab. The user is able to open the Learning tab, navigate through the available links, and select **Browse for Training** using a screen reader or the Tab key.
- Samantha would like to update her goals. She opens the Web version of her portal using the browser on her mobile device. The **Goals** link is the fourth link under the Performance navigation tab for her portal. She is able to easily open the drop-down menu for the Performance tab in the navigation bar and navigate to the Goals page.

FAQs

If my portal currently has the *Eggshell* navigation theme in use, will the *Eggshell - Extended* theme automatically replace my existing theme?

No. If any of the OUs within your organization have the *Eggshell* theme currently enabled, the users within that OU will continue to use the *Eggshell* theme. The new *Eggshell - Extended* theme must be enabled by the administrator via Display Preferences.

Have any of the other existing navigation themes been optimized for improved accessibility and mobile experience?

Only *Contemporary - Extended* and *Eggshell - Extended* have been optimized for improved accessibility and mobile experience.

Will users experience any difference in the *Eggshell - Extended* theme?

Yes. There are slight differences, but these will likely only be noticed by power users. Most significantly, mobile device users can now tap the navigation tabs to expand the sublinks.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Display Preferences - Manage	Grants ability to configure Display Preferences, including Navigation Tab theme and settings and header logo displayed to end users. This is an administrator permission.	Core Administration

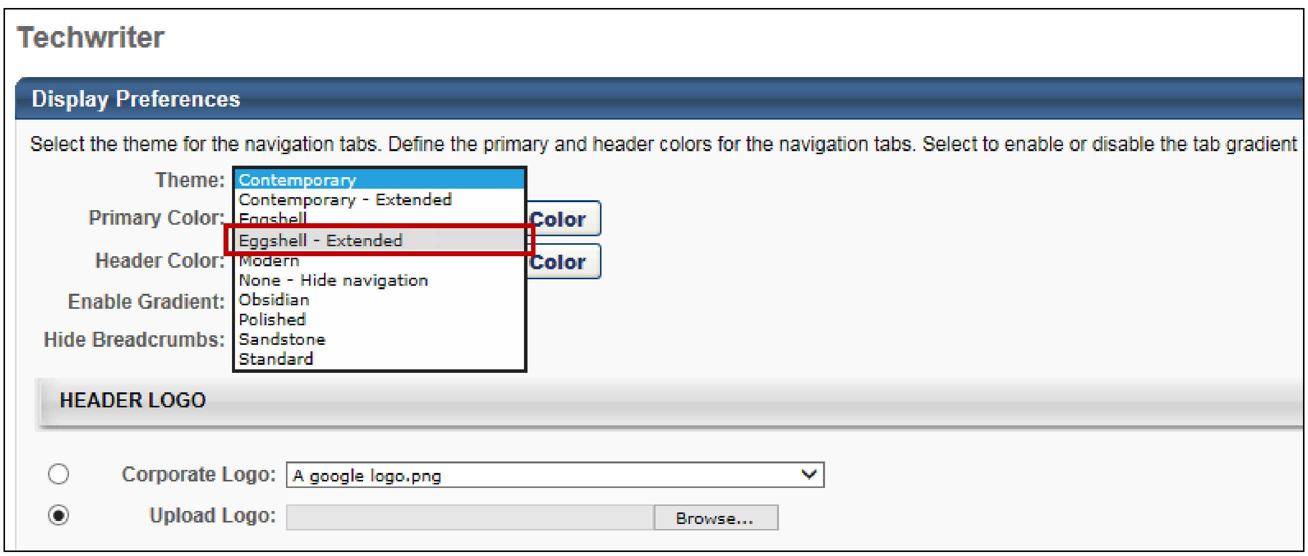
Display Preferences

Prior to this enhancement, only the *Contemporary - Extended* navigation theme offered full WCAG/508 compliance and a mobile-friendly experience. Following this enhancement, the new *Eggshell - Extended* navigation theme also provides full WCAG/508 compliance and a more mobile-friendly experience.

To access Display Preferences, go to **Admin > Tools > Core Functions > Core Preferences > Theme and Logo**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Display Preferences - Manage	Grants ability to configure Display Preferences, including Navigation Tab theme and settings and header logo displayed to end users. This is an administrator permission.	Core Administration



Eggshell - Extended Theme

The new *Eggshell - Extended* navigation theme provides full WCAG/508 compliance and a more mobile-friendly experience. Both the *Eggshell* and *Eggshell - Extended* themes have the same appearance.

To enable the *Eggshell - Extended* navigation theme, select the theme from the **Theme** drop-down on the Display Preferences page.

Mobile-Friendly Experience

When a user taps a navigation tab in the navigation bar, the sub-navigation menu will be displayed and allow the user to select from the available links.

Prior to this enhancement, the system took the user directly to the first page indicated in the sub-navigation menu when tapping the main navigation option. This did not allow users to select any of the links from the sub-navigation menu.

If the user taps the same navigation tab again without selecting a link from the sub-navigation menu, then the sub-navigation menu closes.

Eggshell Extended Theme User Experience

With the navigation enhancements, Cornerstone can be extended to serve more users and more devices, which extends the usage of the application. With these improvements, users will have an enhanced experience and improved mobile capabilities.

On Desktop

When the width of the browser window is narrowed, the navigation bar responds to the change in width by wrapping the navigation bars. This allows all tabs to remain accessible. There is no limit to the number of rows that can appear when reducing the width of the browser window.

On Tablet/Mobile

When viewing the portal on a mobile device, the navigation bar wraps to allow all tabs to remain accessible.

Hover Event

A hover event occurs when hovering the mouse or mousepad over a navigation tab. The hover functionality for the Eggshell - Extended theme is the same as the existing functionality for the Eggshell theme. When hovering over the navigation bar with a mouse, the navigation tabs expand to display the sublinks. This experience is unchanged from the Eggshell theme. This experience is applied for a desktop, laptop, and a tablet with a mouse or mousepad.

Touch Event

A touch event occurs when touching the screen interface, such as when using a smartphone or tablet. When the Eggshell - Extended them is enabled, tapping provides the same experience as clicking. Users can tap the navigation tabs to open the sublinks drop-down, and then tap a sublink to open the associated page. Tapping the tab again collapses the sublinks drop-down.

Focus Event

A focus event occurs when using the Tab key on the keyboard. The Eggshell - Extended theme provides enhanced functionality for use with screen readers. When using the Tab key, a border appears around the selected tab. Upon selecting the Down arrow and Enter keys on the keyboard, the tab expands to show the sublinks. This functionality is designed to provide easy navigation for users who use screen readers to navigate websites. This supports the WCAG and 508 compliance requirements.

Email Queuing Optimization

In order to improve application performance, Cornerstone has optimized our email queuing system. This improves email processing and has no visible changes within email administration. This will not change any of the functionality, but testing is advised to validate the experience and workflows with Email Management.

Enhanced Video Streaming

With the May 2015 release, video streaming via Akamai Technologies was rolled out to all clients.

With this release, video streaming via Akamai Technologies has been upgraded to ensure more reliable support for all existing video content. This series of enhancements specifically resolves the issue in which videos with a high resolution but low video bit rate (e.g., WebEx recordings) were displayed in low quality when streaming. This type of video content is now displayed in the appropriate resolution. Also, when a video is transcoded by Akamai, the video duration is captured and stored so that it can be displayed on administration pages and the Training Details page.

With video streaming, videos that are uploaded to the system and meet the minimum requirements are able to be streamed to the user with minimal buffering and interruptions via Akamai Technologies. When a video file is uploaded to the system with the minimum audio and video bit rates, it is sent via FTP to Akamai to be transcoded into standard audio and video formats, and it is scaled for quality where appropriate. Video content that was previously uploaded to the system and meets the minimum audio and video bit rates will also be migrated and made available for streaming.

If a user attempts to view the video prior to the successful completion of the transcoding, the video is played using the original video file and will not be streamed.

Video streaming ensures all users have an optimal experience when viewing videos within the system. By standardizing the video and audio encoding formats, video content can be made accessible regardless of the user's device. Additionally, video streaming delivers videos to users at the best possible quality level based on their Internet connection speed and adjusts the quality as needed during playback.

Videos that are uploaded to the system must meet the minimum audio and video bit rates in order to be transcoded. Videos that are uploaded to the system and do not meet the minimum audio and video bit rates are not transcoded and continue to play in the original format.

- The minimum audio bit rate for transcoding is 42 kbps.
- The minimum video bit rate for transcoding is 135 kbps.

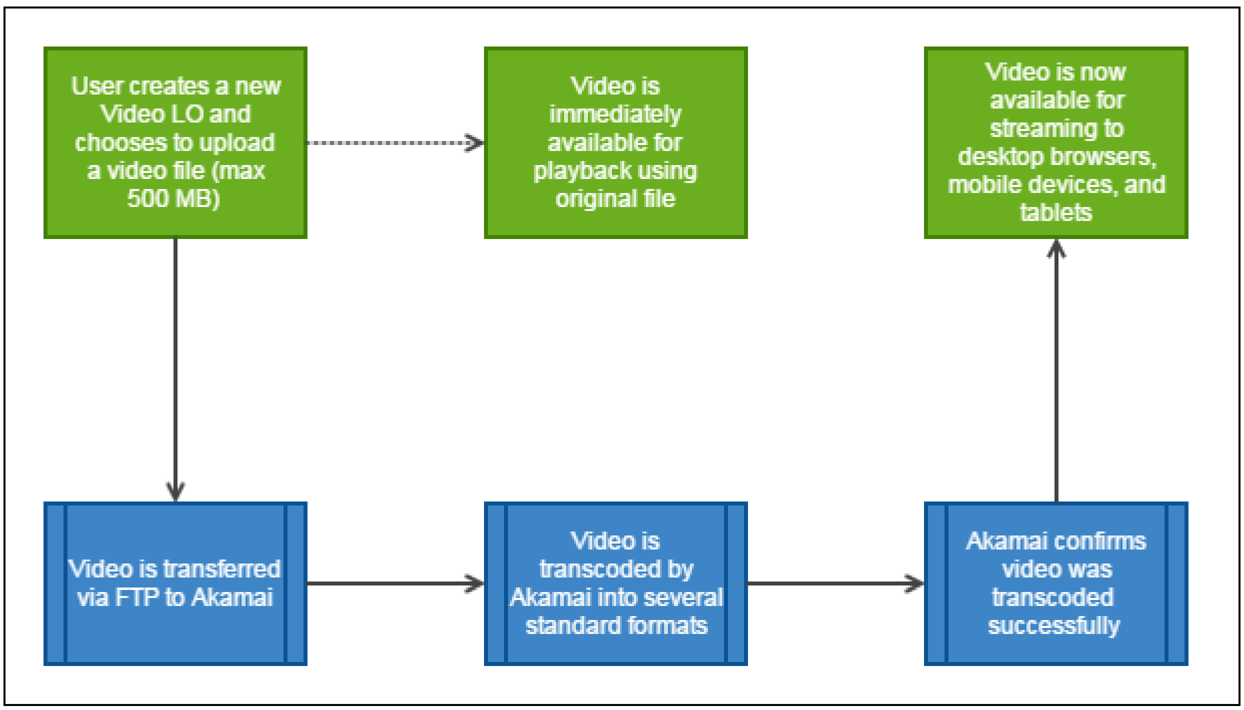
Video Streaming Features

Video streaming via Akamai Technologies includes the following at no additional cost:

FEATURE	AMOUNT
Video storage - This includes all videos uploaded to the system that are eligible for video streaming via Akamai.	250 GB
Video streaming bandwidth per month - This represents the bandwidth consumed by users when streaming video content via the Akamai player.	500 GB
Video transcoding minutes per year - This denotes the amount of time required to transcode the original video files uploaded to the system into the standardized formats used for streaming. The time it takes to transcode a video is based on the file size, format (.mpg, .wmv, etc.), resolution, and audio and video bit rates.	15,000

Organizations that exceed the allowed storage will need to purchase an additional allowance. Cornerstone will begin monitoring usage metrics for video streaming following the October 2015 release.

Workflow



Considerations

Akamai video streaming does not include SCORM wrapped courses or embedded content (i.e., YouTube videos as video LOs).

Video streaming is not available for users in China. When a user in China accesses a transcoded video, the content will play within the Akamai player but will not be streamed using bit rate throttling. Instead, the content will be delivered in segments and the quality level is not adjusted actively during playback.

Implementation

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

Migration of Existing Video Content

Videos that are uploaded to the system must meet the minimum audio and video bit rates in order to be transcoded. Videos that are uploaded to the system and do not meet the minimum audio and video bit rates are not transcoded and continue to play in the original format.

- The minimum audio bit rate for transcoding is 42 kbps.
- The minimum video bit rate for transcoding is 135 kbps.

There is no notification that an existing video has been transcoded other than a difference in the video player once it has been transcoded.

The following table outlines if and when video content will be transcoded for streaming for each portal environment:

	NEWLY UPLOADED VIDEOS	EXISTING UPLOADED VIDEOS	SCORM WRAPPED VIDEOS AND EMBEDDED YOUTUBE VIDEOS
Stage	During UAT for the October 2015 Release, transcoding begins immediately	Never transcoded and is viewable in Flowplayer	Never transcoded
Pilot	Following the October 2015 Release, transcoding begins immediately	Never transcoded and is viewable in Flowplayer	Never transcoded
Production	Following the October 2015 Release, transcoding begins immediately	Following the October 2015 Release, the transcoding process begins.	Never transcoded

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Observation Checklist Admin - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
Observation Checklist - Verifier	Enables user to serve as the verifier for the observation checklist of another user. This permission should be included in the dynamic security role "Checklist Verifier." The role, when active, is dynamically assigned to any user who is designated as a verifier for one or more checklists. This permission can be constrained by OU and User's OU. This is an end user permission.	Performance
Test Question Bank – Manage	Grants ability to create and edit/update test questions in the test engine question bank. This permission can be constrained by OU, User’s OU, User, User’s Self, and User’s Subordinates. This is an administrator permission.	Learning - Administration
Test Question Bank – View	Grants ability to view the test engine question bank. This permission can be constrained by OU, User’s OU, User, User’s Self, and User’s Subordinates. This is an administrator permission.	Learning - Administration
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, Provider, Self and Subordinates, and User. This is an administrator permission.	Learning - Administration
Video Administration - View	Grants ability to view video learning objects (LOs) on the Video Administration page. The availability of this permission is controlled by	Learning - Administration

	a backend setting. This permission can be constrained by OU, User's OU, Provider, Self and Subordinates, and User. This is an administrator permission.	

Enhanced GetUser Web Service

With this enhancement, a GUID field is added to the GetUser web service response. The GUID field is the system-defined, unique identifier for each user (employee or candidate) in the application. With the GUID, clients can call the SetUser web service and update a User ID. This can apply in use cases where the user ID is temporary.

Implementation

This Web Service is automatically available to all portals that have purchased it.

If you have purchased Web Services usage, but need access to this specific one, please contact CSOD via a GPS case to enable.

If you have not purchased Web Services at all, please contact Sales or Client Executive to purchase.

InCommon SSO

InCommon provides a secure and privacy-preserving trust fabric for research and higher education organizations and their partners in the United States. This new service allows for a seamless Signle Sign On (SSO) integration with higher-ed clients. Organizations need to exchange the Entity ID in InCommon, and the metadata is imported directly for SSO setup. Certificate management for SSO automatically picks up changes when they are published by InCommon Federation.

Implementation

To enable this functionality via a paid technical project, contact Sales, or your Client Executive or Client Success Manager.

Insights: Compliance Guide

Insights: Compliance Guide Overview

Insights is a predictive analytics tool that enables organizations to use data to better hire, train, manage, and retain top talent. Insights applies data science to workforce data and displays the results on a series of dashboards.

The Compliance Guide Insight helps organizations understand the impact of employees not completing training in a timely manner for all learning object types except events and sessions. Predictive factors are automatically compiled based on the data generated for the organizational units. These factors help organizations see the conditions that have and have not contributed to users completing their training on time, such as the date on which the training is due. The purpose of knowing the non-contributing factors is that if there is no significance in a risk factor, then that information may be just as valuable to know. For example, if an organization believed that a certain factor was driving compliance issues, and then discovered through Insight that a different factor was the cause, then that information may be valuable as well.

Note: *The Compliance Control and Predictive Succession dashboards will be available in later Q4, and help documentation for those dashboards will be provided at that time.*

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

Security

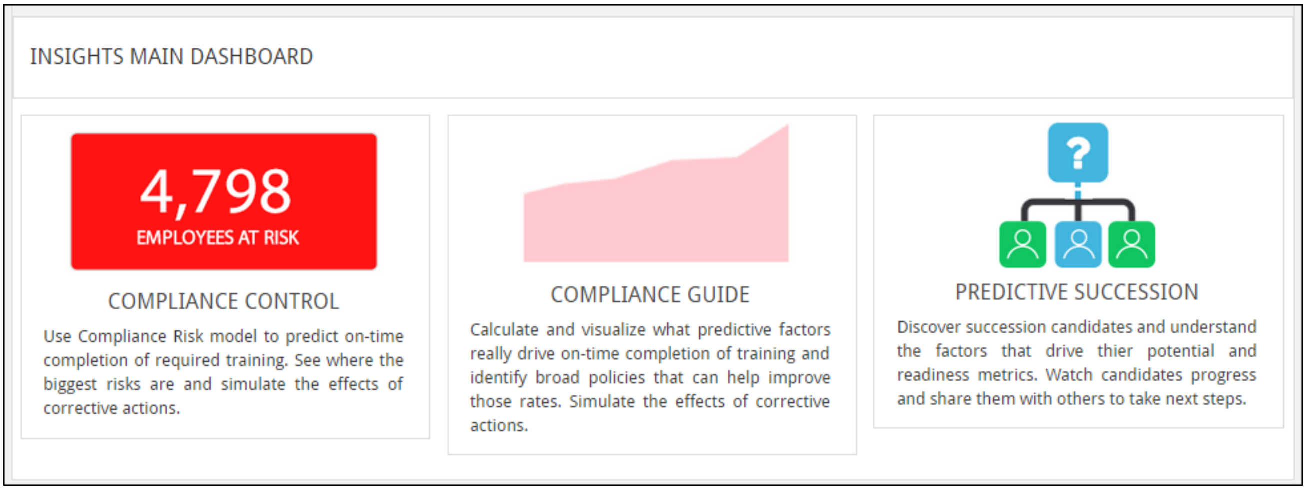
The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Insights Dashboard	Allows user to access Insights Dashboard. This permission cannot be constrained.	Core

Insights Main Dashboard - Compliance Guide

The Insights Main Dashboard displays the main card for the Compliance Guide dashboard. The Compliance Guide card enables you to access the Compliance Strategy dashboard.Click anywhere on the card to open the Compliance Guide dashboard.

Note: *The Compliance Control and Predictive Succession dashboards will be available later in Q4, and help documentation for those dashboards will be provided at that time.*

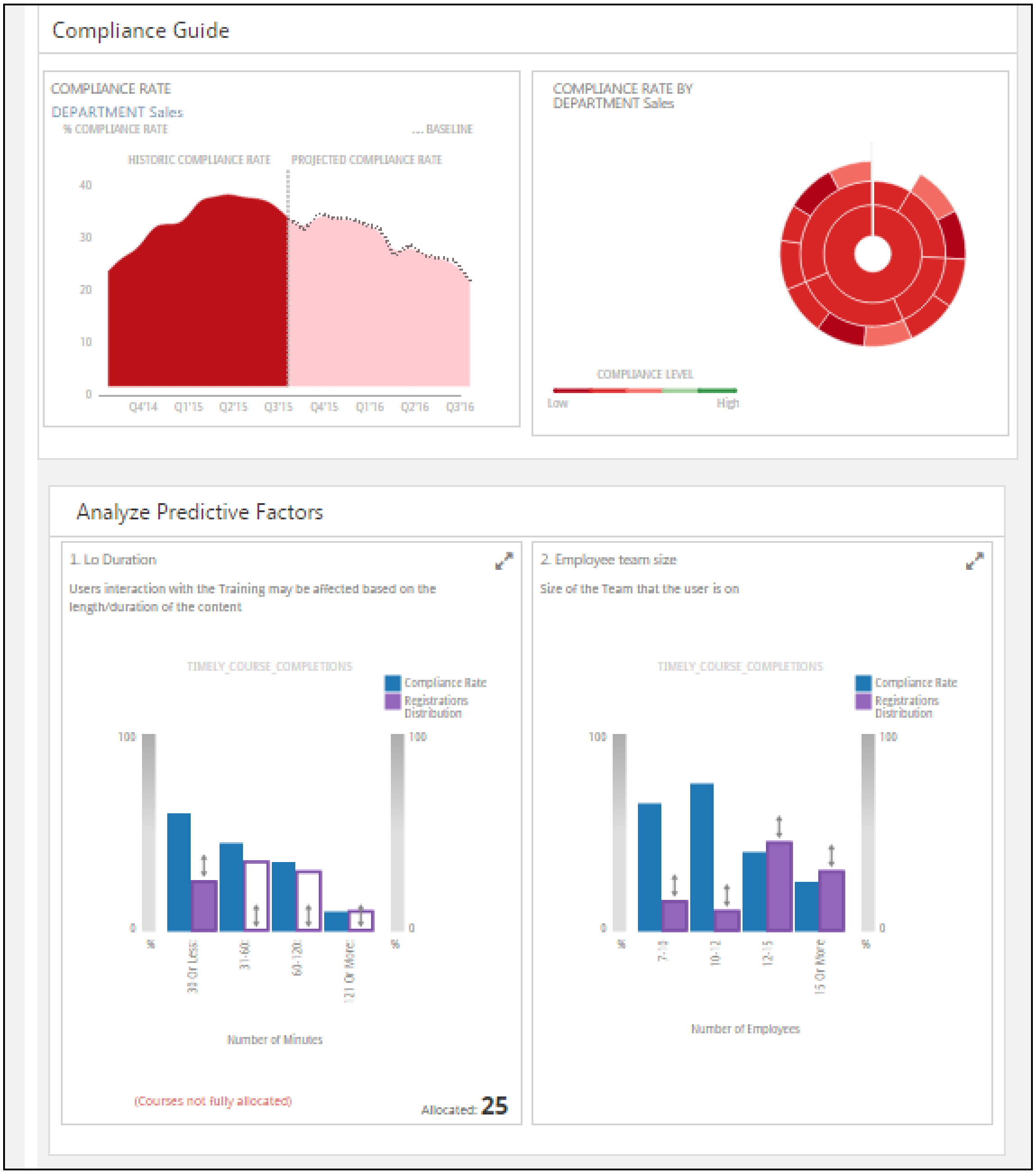


Compliance Guide Dashboard

Compliance risk represents the risk associated with employees not finishing a learning object by the required deadline. Lack of employee compliance with deadlines can result in regulatory fines and/or may prevent employees from performing their assigned duties. The Compliance Guide dashboard is designed to provide a better understanding of the factors that contribute to achieving high compliance rates and help advise in long-term corrective policies designed to reduce risk.

From the dashboard, you can analyze the factors that are predictive to the organization's on time course completion, determine potential actions to increase compliance rates, and help identify meaningful policy changes that can direct the organization to achieving higher long-term compliance rates.

The data in the Compliance Guide dashboard is calculated by looking at historic compliance levels and the factors that drive compliance. The data also looks at how the factors differ across the organization and what steps can be taken to increase compliance.



Analyze by Organizational Unit

The options in the upper-right corner of the dashboard allow you to select a specific organizational unit (OU) type by which to analyze. The OU types that are available in the drop-down are the OU types that are created for the portal. To select an OU, click the drop-down and select the OU type.

Compliance Rate

The Compliance Rate card shows a graphical representation of the historic compliance rate over a 1-year period, which is divided quarterly, and has a calculated forecasted rate of compliance looking ahead and divided quarterly. The future compliance rates are reflective of the current course registrations that are due in the future.

Compliance Rate by [Organizational Unit]

The Compliance Rate by [Organizational Unit] card shows a chart with the selected OUs and their compliance rating identified by a low to high color, where green represents a high level of compliance and red represents a low level of compliance. The color for a given OU is determined by the historic compliance rate in the Compliance Rate card. The colors are not customizable.

The compliance level is plotted from low to high (red to green) where the compliance level looks back over the course of the past data in the trend chart. For example, if the trend chart looks at the past four quarters in the historic section, this means that the historic information is comprised of those four quarters in the sunburst.

Each color box in the chart represents an individual OU. Hovering over a color box opens a tooltip that displays the department name, compliance rate percentage, and number of courses that are overdue for completion. Clicking on the color box drills into the OU and updates the Compliance Rate card and the predictive factors based on the data analysis for the selected OU type.

Analyze Predictive Factors

The Analyze Predictive Factors section displays a widget for each factor that contributes to predicting what makes users complete or not complete their training on time, based on the data in the Compliance Rate cards.

The following information displays in each widget to help understand the course completion rates for each group represented in the X axis:

- Name of the predictive factor
- Chart illustrating how the KPI's compliance rates change for various values of the predictive factor
- KPI and factor appropriate labels on the chart
- Ability to select the factor cards individually
- Verbal description of the data in the chart

Show More

Click the **Show More** link at the bottom of the first row of cards to display additional predictive factors.

Select Individual Cards

You can select one or more individual cards to analyze. To select a card, click anywhere in the card. When a card is checked, a checkbox appears in the card to indicate that the card has been selected.

Clear Selection

Click the **Clear Selection** link to clear the cards you have selected.

View Selection

Click the **View Selection** link to see a pop-up of all the predictive factors that have been selected for analysis. This allows you to view the different factors selected prior to going to the analysis page.

Analyze All

This button displays if no individual cards have been selected for analysis. Click **ANALYZE ALL** to analyze all of the predictive factors. This opens the Analyze Predictive Factors page, which summarizes the key insights and enables users to simulate analyses to generate the support needed for policy recommendations. The page allows users to forecast how a redistribution of courses based on those factors would impact their historic and forecasted compliance rates. This helps you understand the effects of changing some of the parameters surrounding the factors.

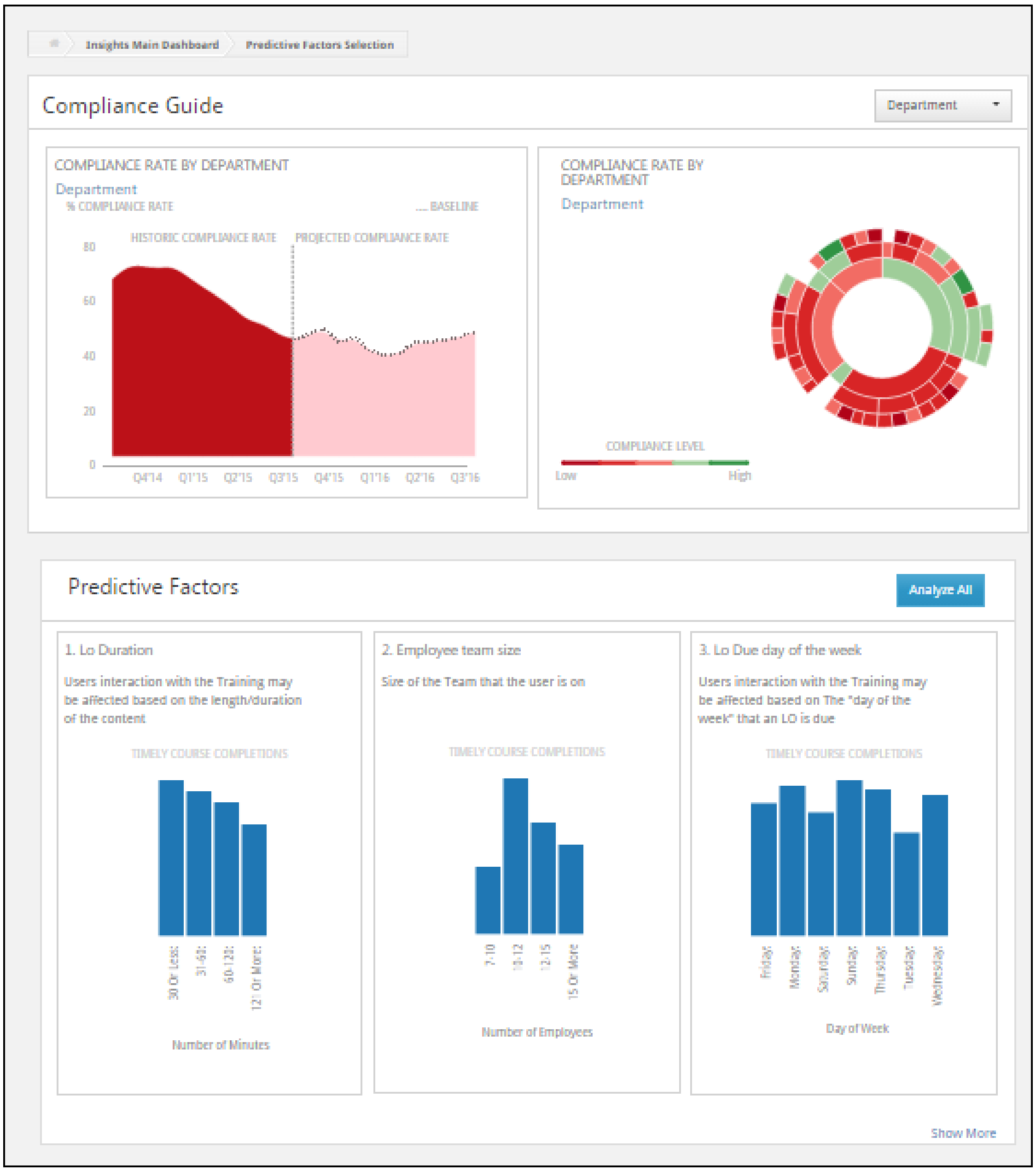
Analyze Selected

This button displays if one or more individual cards have been selected for analysis. Click **ANALYZE SELECTED** to analyze the selected predictive factors. This opens the Analyze Predictive Factors page, which summarizes the key insights and policy recommendations for the selected factors. This helps you understand the effects of changing some of the parameters surrounding the selected factors.

Predictive Factors Selection Page

The Predictive Factors Selection page summarizes the key insights and metrics for the factors that drive compliance. The predictive factors section helps the organization to approach an analysis that will help them take the next steps when putting policies in place to reduce future compliance risk and drive higher compliance rates.

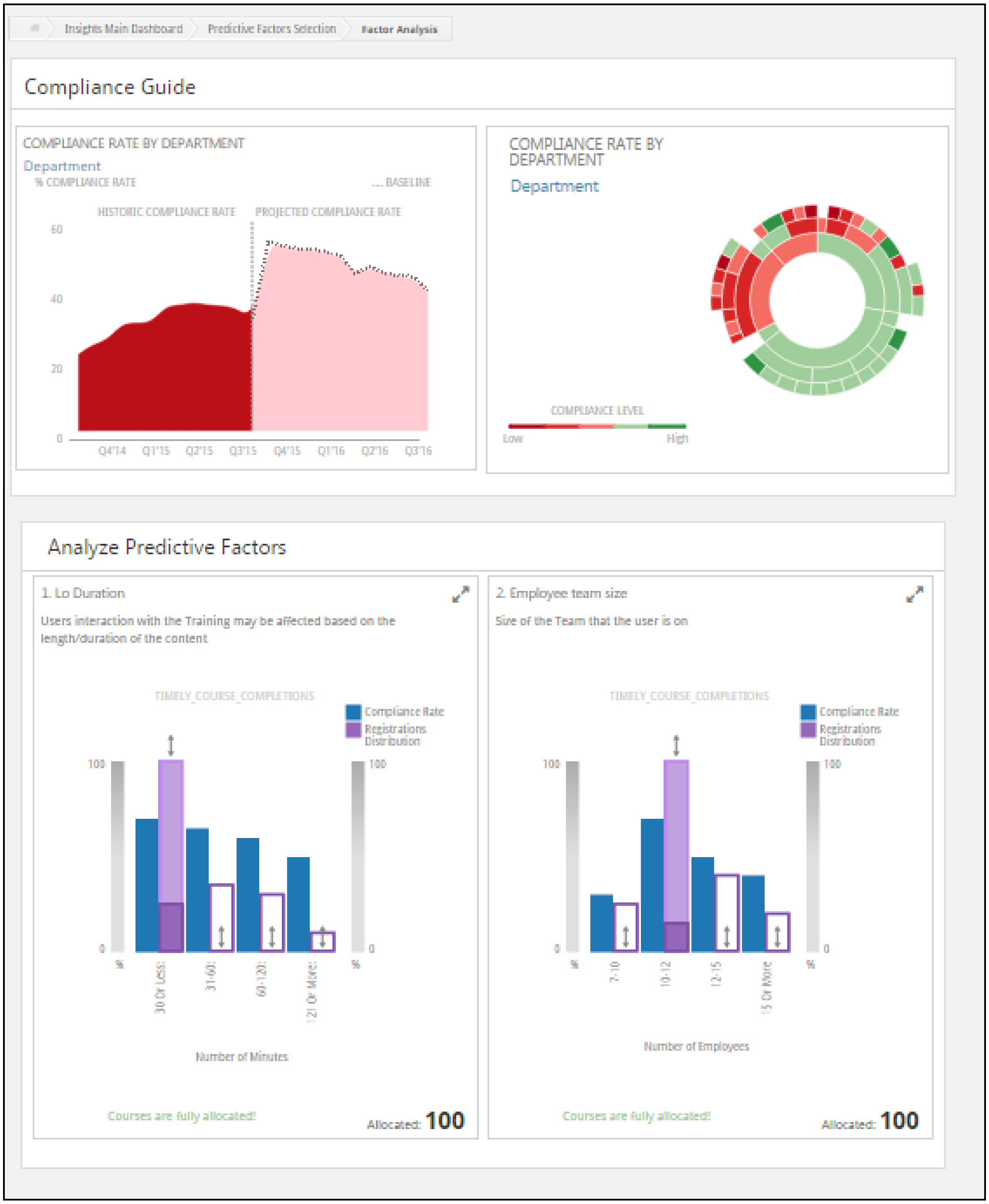
To access the Analyze Predictive Factors page, click the **ANALYZE ALL** or **ANALYZE SELECTED** button in the Analyze Predictive Factors section on the Compliance Guide dashboard.



Factor Analysis Page

The Factor Analysis page allows users to simulate course distribution changes to see the effects on past or future compliance rates to help them make compliance policy change decisions. Users can verify compliance rates associated with the parameter groupings for each of the predictive factors, see the current allocation of courses among each one of the groups, and simulate the allocations to analyze the forecasted impacts to the organization's compliance rate.

If the user attempts the reallocate course registration distributions for each factor, then each factor needs to be 100% reallocated before you can simulate the compliance rate impacts of those risk factors on the cohort.


Insights Main Dashboard
Predictive Factors Selection
Factor Analysis
Compliance Guide
COMPLIANCE RATE BY DEPARTMENT
Department
% COMPLIANCE RATE
... BASELINE
HISTORIC COMPLIANCE RATE
PROJECTED COMPLIANCE RATE
COMPLIANCE RATE BY DEPARTMENT
Department
COMPLIANCE LEVEL
Low
High
Analyze Predictive Factors
1. Lo Duration
Users interaction with the Training may be affected based on the length/duration of the content
TIMELY_COURSE_COMPLETIONS
Compliance Rate
Registrations Distribution
Number of Minutes
Courses are fully allocated!
Allocated: 100
2. Employee team size
Size of the Team that the user is on
TIMELY_COURSE_COMPLETIONS
Compliance Rate
Registrations Distribution
Number of Employees
Courses are fully allocated!
Allocated: 100

Link: Capture Canceled Reasons

This enhancement has been removed from the October 2015 release.

Link: Forms Support Reason for Change

Forms Support Reason for Change Overview

With this enhancement, for portals with Link plus Form Management enabled, a **Reason for Change** field can be added to forms. The field enables administrators to track the reason a change is made to the user record as a result of user data captured on forms, such as changing a user's last name. When users complete the form, they can be required to fill out the **Reason for Change** field and select the reason that there is a change to their user data. Once the form is submitted and approved (if approval is required), then the system automatically captures the reason for the change in the Modification History section on the User Record page.

Implementation

This enhancement is only available for portals with Link plus Form Management enabled. In addition, Reason for Change must be enabled in the portal. This enhancement is not available for portals with Recruiting or Onboarding that do not also have Link enabled.

Use Case

Situation

Gayashri has decided to change her name on her employee record to her married name. She needs to ensure that her name is updated in the organization’s system of record.

Process

1. The talent administrator creates an Employee Data Change Form. He includes all pertinent fields, such as First Name, Last Name, and address fields. Because he has added user fields to the form, he also needs to add the **Reason for Change** field to the form. For the drop-down options on this particular form, he selects the following reasons to be available for users to select: Data Correction, Employee Relocation, and Personal Data Change. He also makes sure to set the form as Self-Service for all employees so that they can easily access the form whenever it is needed. He sets up an approval workflow for the form so that Human Resources can confirm with the employee prior to approving the changes.
2. Gayashri searches for the Employee Data Change Form in Global Search. She fills out her updated Last Name on the form and selects Personal Data Change in the Reason for Change field. Then, she submits the form for approval.
3. Laura, a Human Resources Manager, receives a request for approval of Gayashri's Employee Data Change Form. She quickly confirms with Gayashri that she does indeed want to update her name, and then she approves the form.

4. Gayashri's user record is updated with her new last name. Her user record reflects the change in the Modification History section with Personal Data Change as the reason.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration
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
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
Users - Edit Core Information	Grants ability to add users and edit core information on a user record, including first name, last name, username, assigned OUs, and custom relationships. This permission works in conjunction with the Users - View and Users - View Core and Edit Custom Fields permissions.	Core Administration

	This permission cannot be constrained. This is an administrator permission.	
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
Users - View	Grants ability to search for and view summary information about users in the portal, via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.	Core Administration

Create Form

With this enhancement, a **Reason for Change** field can be added to forms. The field is available from the User Standard Fields section under System Fields. If a standard or custom user field is added to a form, then the **Reason for Change** field must also be added in order to save the form.

The **Reason for Change** field enables administrators to track the reason a change is made to the user record as a result of user data captured on forms, such as changing a user's last name. When users complete the form, they can be required to complete the **Reason for Change** field by selecting the reason that there is a change to the user data. Then, when the user data is updated on the user record, the reason for change can be included.

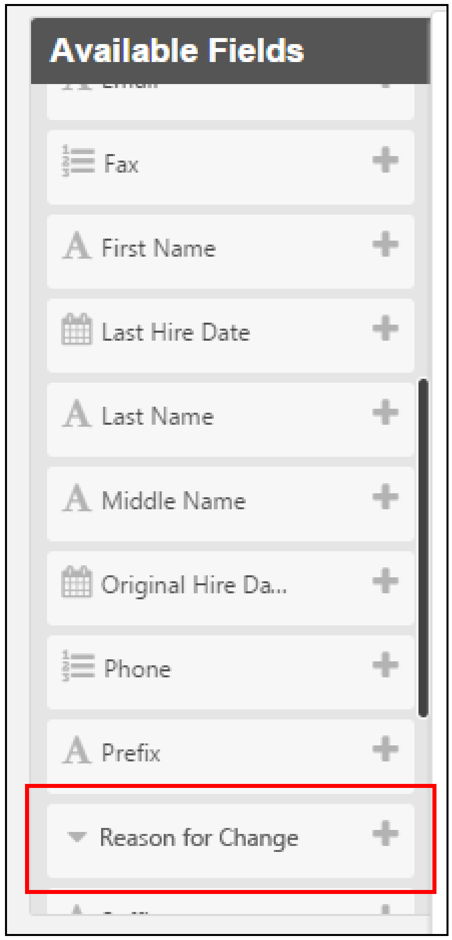
To create a form, go to **Admin > Tools > Core Functions > Form Management > Manage Forms**. Then, from the Manage Forms page, select the **CREATE FORM** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Forms - Manage	Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration

Add Reason for Change Field

To add the **Reason for Change** field, click the add icon for the field from the User Standard Fields section under System Fields. Only one **Reason for Change** field can be added to a form.

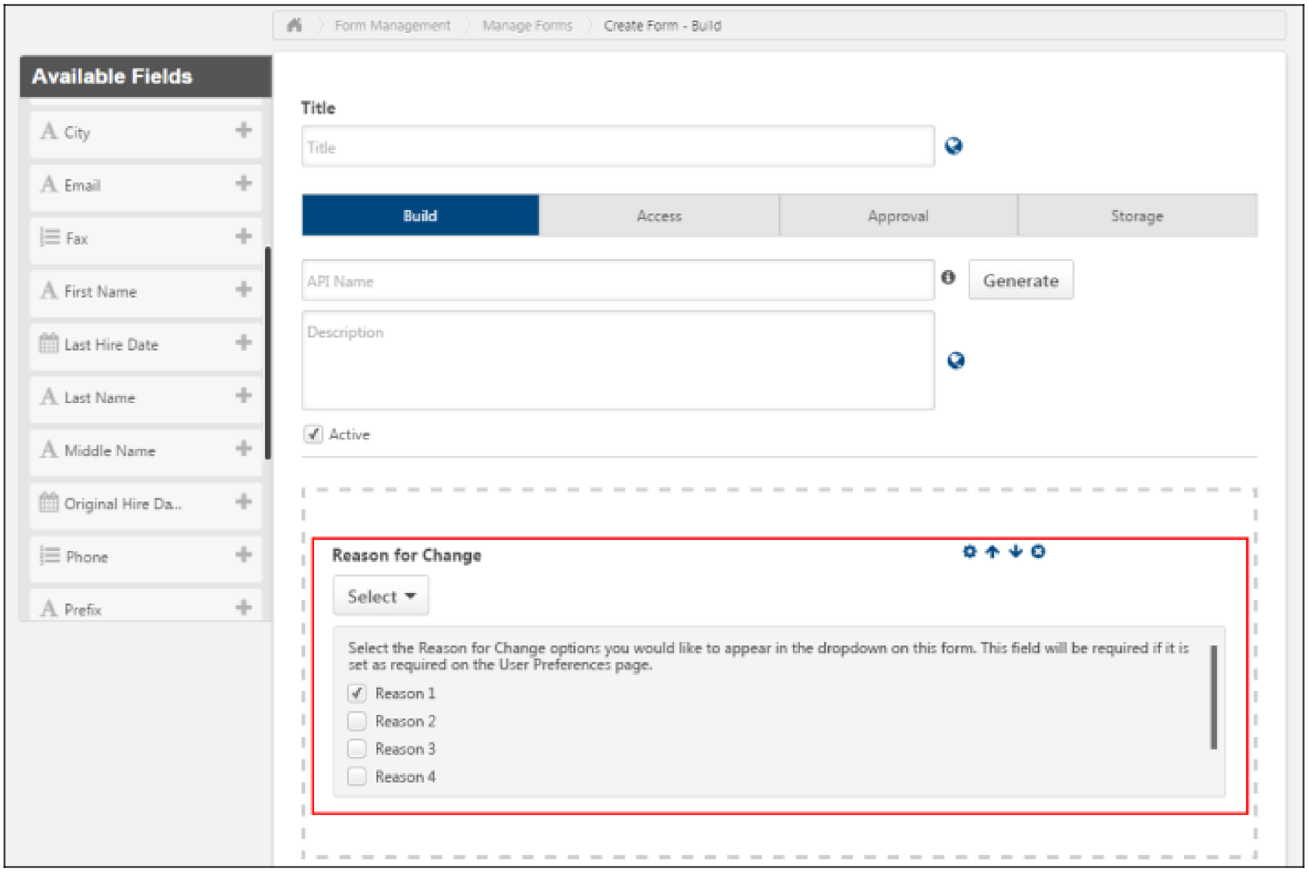


Select Reasons for Change

Once the **Reason for Change** field is added, the reasons that will be available to users to select must be defined for the field. To select the reasons:

1. Click the Settings icon for the field. This enables the drop-down options to display below the field.
2. Check the box next to each option that you would like to be available for users to select in the drop-down. The options that are available are the active options defined for the field by the administrator in **User Preferences**. If a reason is inactivated, the reason only displays on published forms if the user has not yet submitted the form.

Once the options are defined, you can continue building the form. For detailed information about creating forms, see the **Create Form Overview** topic in Online Help.



Copy Form

When a form that includes a **Reason for Change** field is copied, the **Reason for Change** field is copied to the form, as well as the reasons selected for the field.

Launch Form

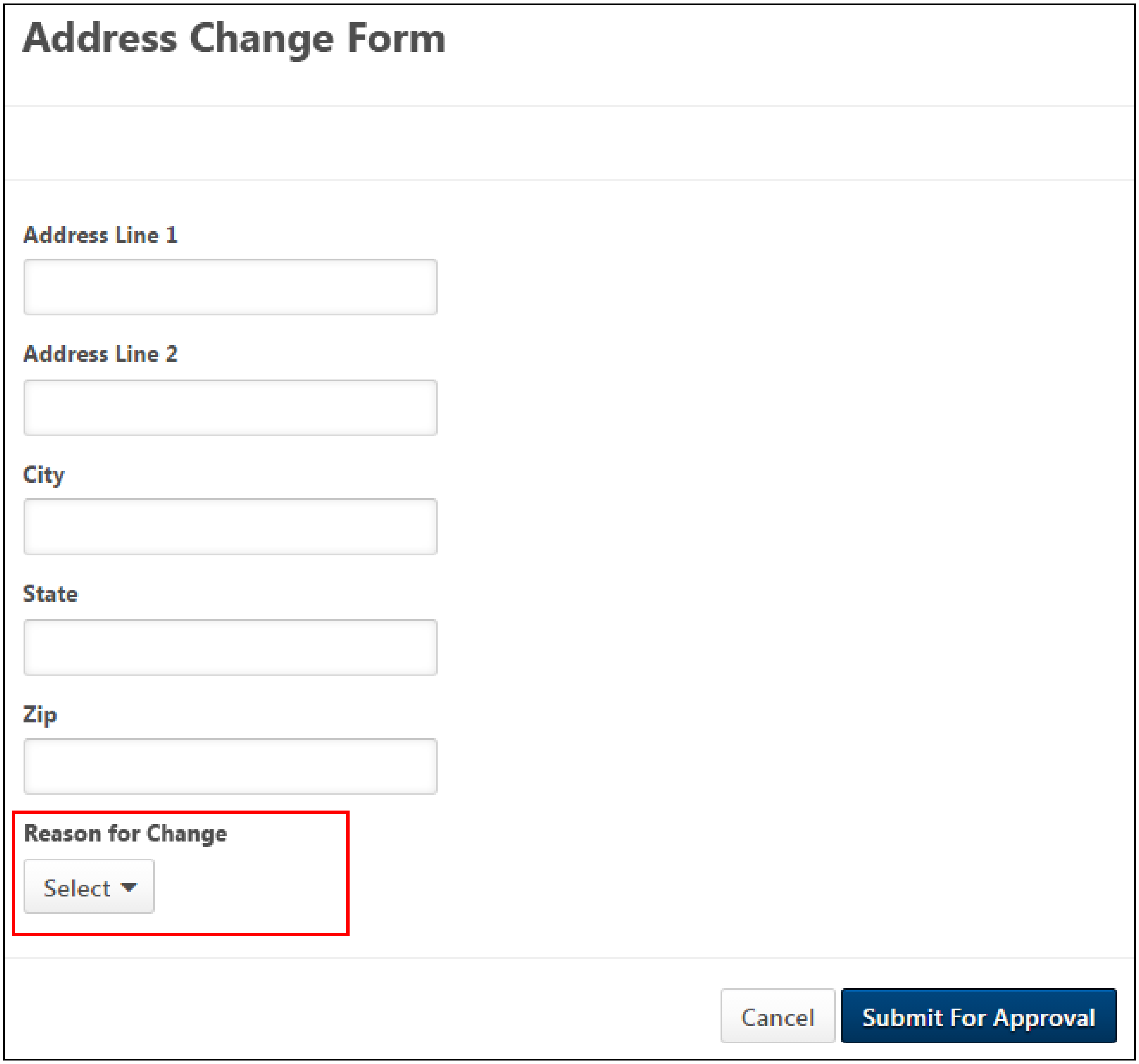
When users complete a form that has a **Reason for Change** field, they select the reason for change from the drop-down in the field. The field may be configured as required if the administrator has enabled the **Require reason for change** field in **User Preferences**. The **Reason for Change** field is used to track the reason a change is made to the user record as a result of user data captured on forms, such as changing a user's last name.

Once the form is submitted and approved (if approval is required), then the system automatically updates the user record with the user's updated information and captures the reason for the change in the Modification History section on the User Record page.

To launch a form, go to **Universal Profile > Actions**. Or, launch the form from the Your Action Items widget on the Welcome page, if the widget is configured for the page by the administrator.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - Forms	Grants ability to view Form actions via the Universal Profile - Actions page or the Welcome/Custom page Actions widget. This permission cannot be constrained.	Universal Profile
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by Employee Relationship, OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile


Address Change Form
Address Line 1
Address Line 2
City
State
Zip
Reason for Change
Select
Cancel
Submit For Approval

User Record

With this enhancement, a **Reason for Change** field can be added to forms. The field enables administrators to track the reason a change is made to the user record as a result of user data captured on forms, such as changing a user's last name.

For forms that include a **Reason for Change** field, the reason for change that is selected on the form displays in the Reason column of the Modification History section on the User Record page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - Edit Core Information	Grants ability to add users and edit core information on a user record, including first name, last name, username, assigned OUs, and custom relationships. This permission works in conjunction with the Users - View and Users - View Core and Edit Custom Fields permissions. This permission cannot be constrained. This is an administrator permission.	Core Administration
Users - View	Grants ability to search for and view summary information about users in the portal, via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.	Core Administration
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

Modification History

Field Changed | Field Type: All Field Types | Reason for change: All Reasons | Search | Include Scheduled Changes

(43 Results) 1 2 3 > »

Effective Date	Change Date	Field Changed	Field type	Changed From	Changed To	Changed By	Reason
1/1/2016 12:00 AM	10/6/2015 9:13 AM	Manager	Employee relationship	Lamon, Ella (emp000...	Lancaster, Stuart (ccook)	Mullen, Lori (lmullen)	Promotion
1/1/2016 12:00 AM	10/6/2015 9:13 AM	Division	Organizational Unit	Customer Care Depar...	Accounting	Mullen, Lori (lmullen)	Promotion
1/1/2016 12:00 AM	10/6/2015 9:13 AM	Position	Organizational Unit	Customer Service Re...	Accounting Manager	Mullen, Lori (lmullen)	Promotion
1/1/2016 12:00 AM	10/7/2015 6:58 AM	Location	Organizational Unit	London	N/A	Admin, Cornerstone (c...	Data Correction
12/31/2015 12:00 AM	10/7/2015 11:03 AM	Phone	User standard field	0203 433 521	017842 3500	Mullen, Lori (lmullen)	Transfer
12/31/2015 12:00 AM	10/7/2015 11:03 AM	Manager	Employee relationship	Lancaster, Stuart (ccook)	Saint André, Philippe (...	Mullen, Lori (lmullen)	Transfer
12/31/2015 12:00 AM	10/7/2015 11:03 AM	City	User standard field	London	Paris	Mullen, Lori (lmullen)	Transfer
12/31/2015 12:00 AM	10/7/2015 11:03 AM	Zip	User standard field	TW2 7BA	75009	Mullen, Lori (lmullen)	Transfer
12/31/2015 12:00 AM	10/7/2015 11:03 AM	Country	User standard field	United Kingdom	France	Mullen, Lori (lmullen)	Transfer
11/9/2015 2:47 AM	11/9/2015 2:47 AM	Cost Center	Organizational Unit	N/A	EMEA	Mullen, Lori (lmullen)	Data Correction
11/9/2015 2:47 AM	11/9/2015 2:47 AM	Date of Birth	User custom field		5/13/1984	Mullen, Lori (lmullen)	Data Correction
11/9/2015 1:09 AM	11/9/2015 1:09 AM	First Name	User standard field	Chris	Ryan	Mullen, Lori (lmullen)	Data Correction
11/9/2015 1:09 AM	11/9/2015 1:09 AM	Last Name	User standard field	Robshaw	Kopp	Mullen, Lori (lmullen)	Data Correction

Inserted by Lori Mullen (lmullen) on 9/9/2011 9:22:54 AM

Link: Manage and Access User Compensation

Link: Manage and Access User Compensation

With this enhancement, organizations that are using Link are now able to manage and access user compensation data. In addition, a new Employee Salary option is now available on the User Records Administration page. This option opens the Employee Salary Management page for the user.

Organizations that are using Link are able to manage and access the following compensation data:

- Employee Salaries
- Bonus Types
- Employee Bonus Targets
- Compensation Currencies
- Salary Structures

Implementation

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

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Bonus Types - Manage	Grants ability to create and manage additional bonus components within the compensation module. This is an administrator permission.	Compensation - Administration
Compensation Currency Rates	Grants ability to define currency conversion rates and decimals of precision. This is an administrator permission.	Compensation - Administration
Compensation Individual Targets	Grants ability to set bonus and equity targets for individual users. With individual targets, adjustment guidelines that have a bonus or equity type component have the option of setting target values to individual targets. This is an administrator permission.	Compensation - Administration
Compensation	Grants ability to define the salary ranges	Compensation -

Salary Structure	for the organization for both annual and hourly employees. This is an administrator permission.	Administration
Employee Salary Management	Grants access to the Employee Salary Management page to edit, add, and view users' salaries or rates. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Compensation - Administration
Users - View	Grants ability to search for and view summary information about users in the portal, via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.	Core Administration

Compensation Management

With this enhancement, if an organization is using Link, then administrators with the appropriate permissions can access the Compensation Management page. On the Compensation Management page, administrators have access to the following pages:

- Employee Salaries
- Currencies
- Bonus Types
- Individual Targets
- Salary Structures

The functionality on these pages is unchanged.

To access Compensation Management, go to **Admin > Tools > Compensation Management**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Bonus Types - Manage	Grants ability to create and manage additional bonus components within the compensation module. This is an administrator permission.	Compensation - Administration
Compensation Currency Rates	Grants ability to define currency conversion rates and decimals of precision. This is an administrator permission.	Compensation - Administration
Compensation Individual Targets	Grants ability to set bonus and equity targets for individual users. With individual targets, adjustment guidelines that have a bonus or equity type component have the option of setting target values to individual targets. This is an administrator permission.	Compensation - Administration
Compensation Salary Structure	Grants ability to define the salary ranges for the organization for both annual and hourly employees. This is an administrator permission.	Compensation - Administration

Employee Salary Management	Grants access to the Employee Salary Management page to edit, add, and view users' salaries or rates. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Compensation - Administration

Bonus Types

With this enhancement, if an organization is using Link, then administrators with the appropriate permissions can access the Bonus Types page. On the Bonus Types page, administrators can view and configure bonus types.

The functionality on this page is unchanged.

To access the Bonus Types administration screen, go to **Admin > Tools > Compensation Management > Bonus Types**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Bonus Types - Manage	Grants ability to create and manage additional bonus components within the compensation module. This is an administrator permission.	Compensation - Administration

Currencies

With this enhancement, if an organization is using Link, then administrators with the appropriate permissions can access the Currencies page. On the Currencies page, administrators can view and configure currency conversion rates.

Organizations can also configure a data feed to feed currency conversion rates into the system. To enable this functionality, contact Global Product Support. For more information about this functionality, contact your Client Success Manager.

The functionality on this page is unchanged.

To access Compensation Currencies, go to **Admin > Tools > Compensation Management > Currencies**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Currency Rates	Grants ability to define currency conversion rates and decimals of precision. This is an administrator permission.	Compensation - Administration

Employee Salary Management

With this enhancement, if an organization is using Link, then administrators with the appropriate permissions can access the Employee Salaries page. On the Employee Salaries page, administrators can search for users and manage their salaries.

The functionality on this page is unchanged.

To access Employee Salary Management, go to **Admin > Tools > Compensation Management > Employee Salaries**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Salary Management	Grants access to the Employee Salary Management page to edit, add, and view users' salaries or rates. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Compensation - Administration

Individual Targets

With this enhancement, if an organization is using Link, then administrators with the appropriate permissions can access the Individual Targets page. On the Individual Targets page, administrators can set bonus and equity targets for individual users.

The functionality on this page is unchanged.

To set individual targets, go to **Admin > Tools > Compensation Management > Individual Targets**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Individual Targets	Grants ability to set bonus and equity targets for individual users. With individual targets, adjustment guidelines that have a bonus or equity type component have the option of setting target values to individual targets. This is an administrator permission.	Compensation - Administration

Salary Structures

With this enhancement, if an organization is using Link, then administrators with the appropriate permissions can access the Salary Structures page. On the Salary Structures page, administrators can define the salary ranges for the organization for both annual and hourly employees.

The functionality on this page is unchanged.

To set the salary structure, go to **Admin > Tools > Compensation Management > Salary Structures**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Salary Structure	Grants ability to define the salary ranges for the organization for both annual and hourly employees. This is an administrator permission.	Compensation - Administration

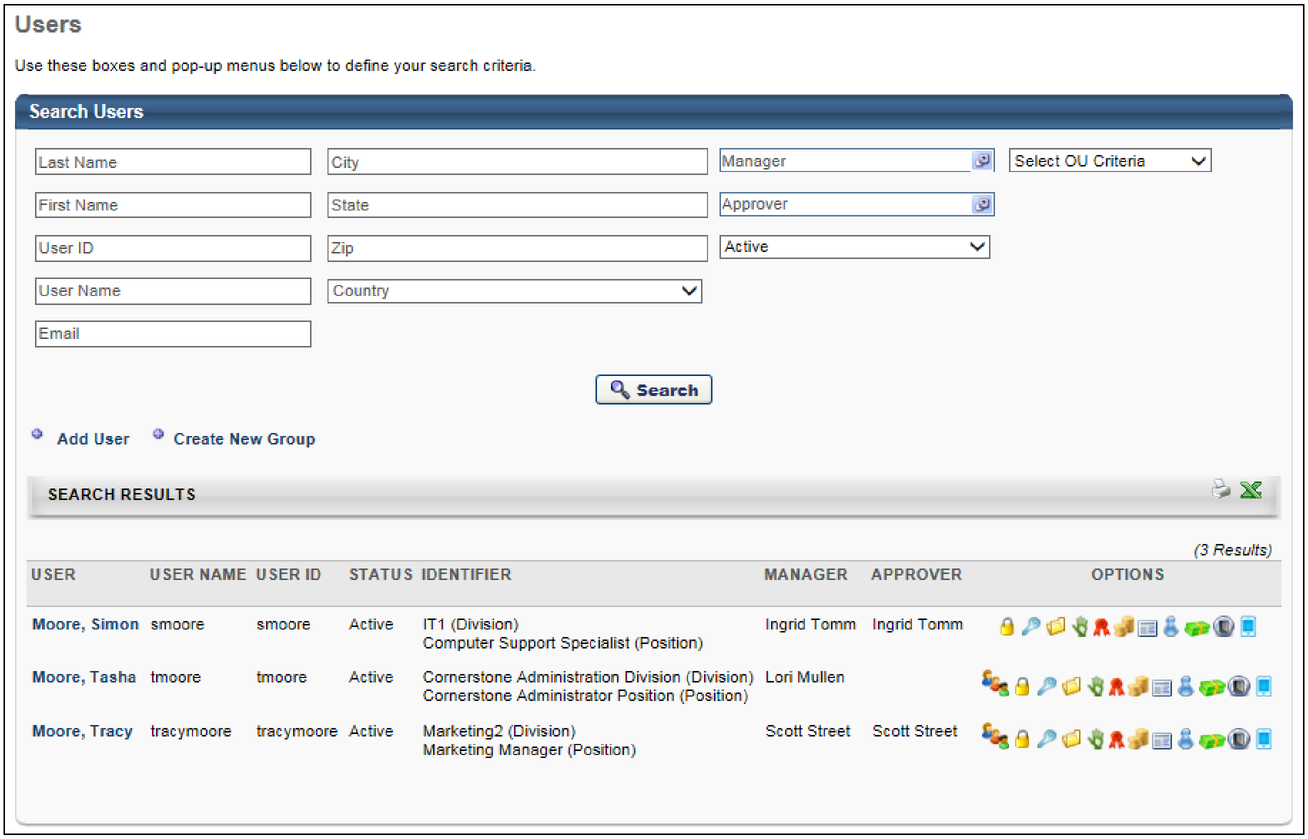
User Records Administration - Employee Salary

With this enhancement, a new Employee Salary icon  is available in the Options column of User Records Administration page. This option is available to administrators who have permission to view users and manage employee salaries. Selecting this option opens the Employee Salary Management page for the user. There, the administrator can add, remove, and update the user's salaries.

To access the User Records Administration page, go to **Admin > Tools > Core Functions > Users**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Salary Management	Grants access to the Employee Salary Management page to edit, add, and view users' salaries or rates. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Compensation - Administration
Users - View	Grants ability to search for and view summary information about users in the portal, via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.	Core Administration


Users
Use these boxes and pop-up menus below to define your search criteria.
Search Users
Last Name
City
Manager
Select OU Criteria
First Name
State
Approver
User ID
Zip
Active
User Name
Country
Email
Search
Add User
Create New Group
SEARCH RESULTS
(3 Results)
USER
USER NAME
USER ID
STATUS
IDENTIFIER
MANAGER
APPROVER
OPTIONS
Moore, Simon
smoore
smoore
Active
IT1 (Division)
Computer Support Specialist (Position)
Ingrid Tomm
Ingrid Tomm
Moore, Tasha
tmoore
tmoore
Active
Cornerstone Administration Division (Division)
Cornerstone Administrator Position (Position)
Lori Mullen
Moore, Tracy
tracymoore
tracymoore
Active
Marketing2 (Division)
Marketing Manager (Position)
Scott Street
Scott Street

Online Help Redesign

Online Help Redesign

Online Help is getting even more helpful. We're improving your ability to locate content within Online Help via Search and the Table of Contents. Specifically you'll find:

1. Search Widget: More visible, accessible, and effective.
2. Search Results: Optimized so that the most valuable topics are displayed first and in a more visual fashion.
3. Table of Contents: Enhanced to be more intuitive and functional and each folder will be linked to a landing page to reduce clicks.

We're also redesigning Online Help to reflect the modern Cornerstone brand that you're used to.

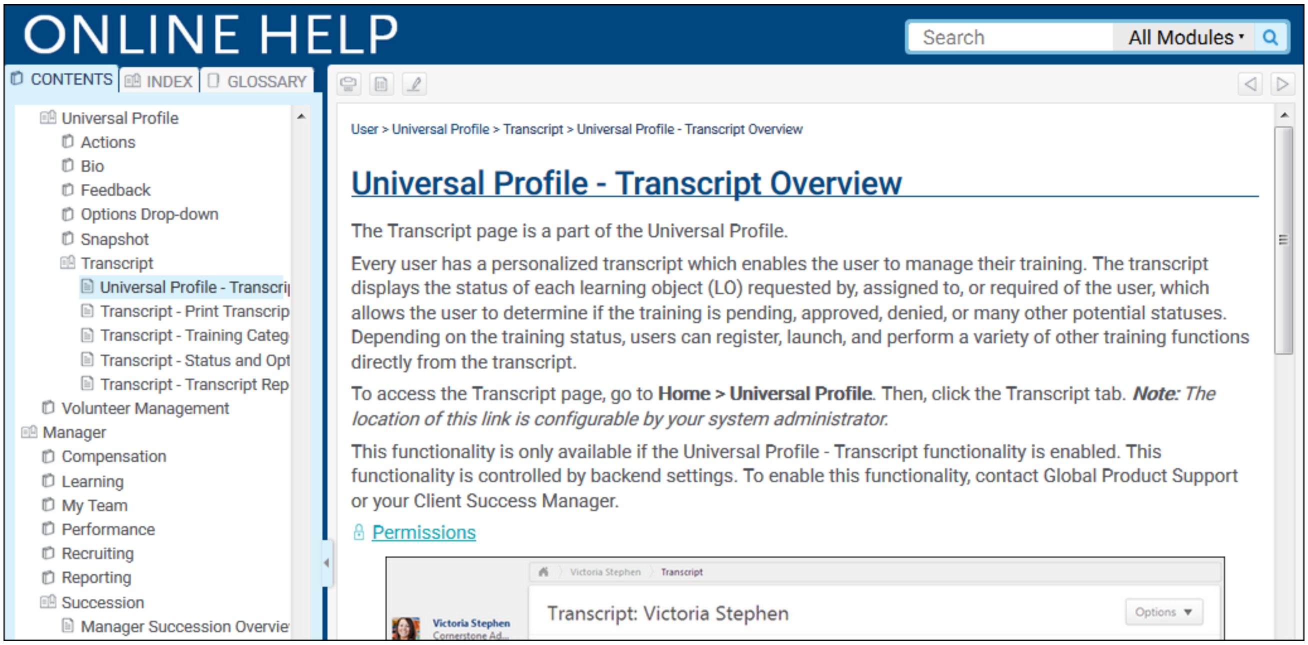
Implementation

Upon release, this functionality is automatically enabled for all organization that have Online Help enabled.

This enhancement is not available to test during UAT, but will be automatic upon release across environments.

Online Help Appearance

The overall style and appearance of Online Help is redesigned to reflect the modern Cornerstone brand.



Search Enhancements

A new Search widget is always available, enabling you to search Online Help more effectively. When you search Online Help, the search results are displayed in a more visual fashion, enabling you to get a glimpse into the topic's content prior to selecting a search result. In addition, the search results are optimized so that the most valuable topics are displayed first.

If your search term matches a term in the Glossary, then the Glossary definition appears at the top of the search results.

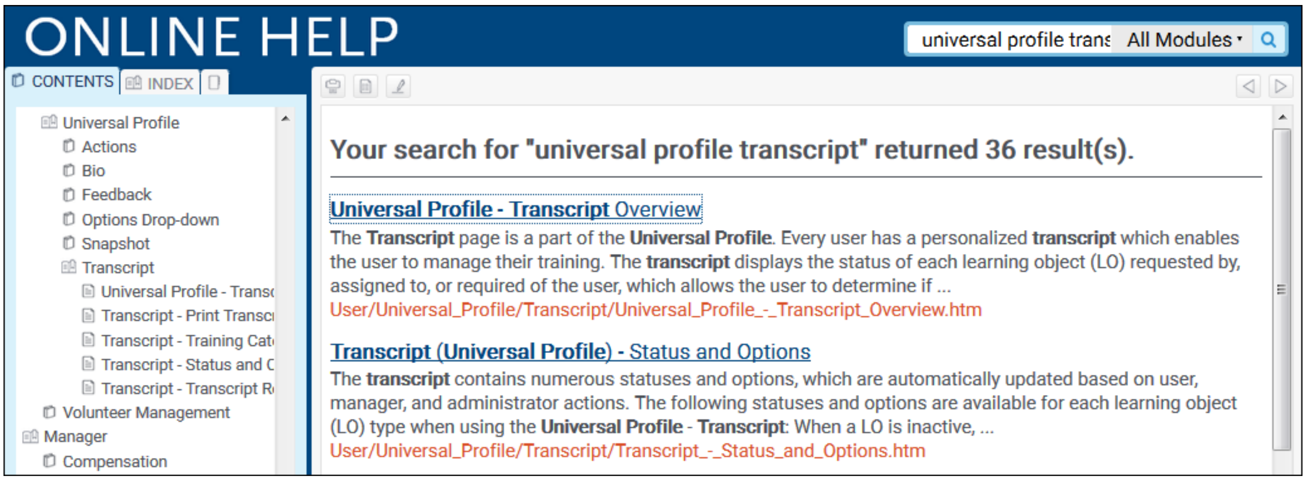


Table of Contents

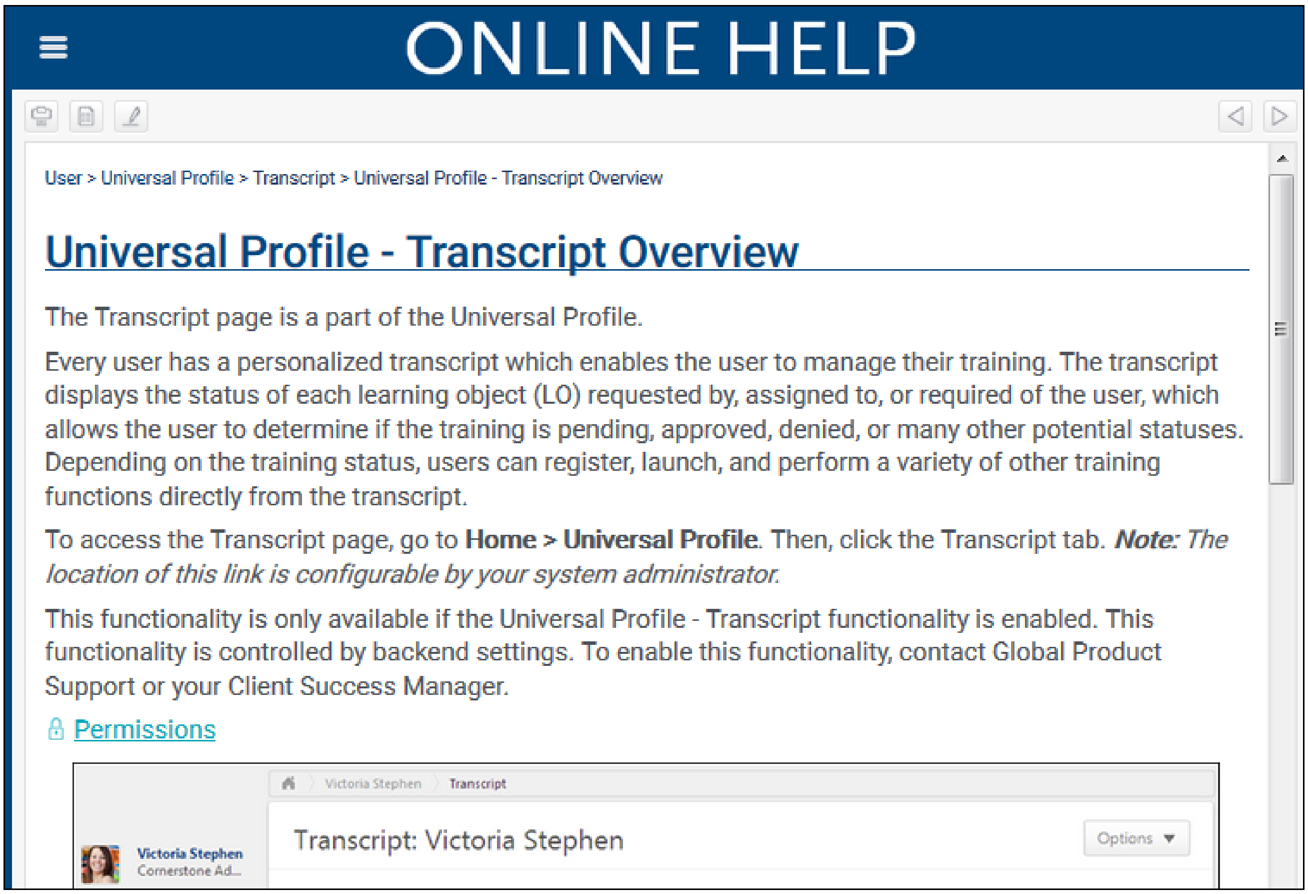
Within Online Help's Table of Contents, the Administrator folder is simplified so that content is easier to find. The Administrator folder is now organized by module in order to be in line with the organization of functionality within the Admin > Tools area of the system.

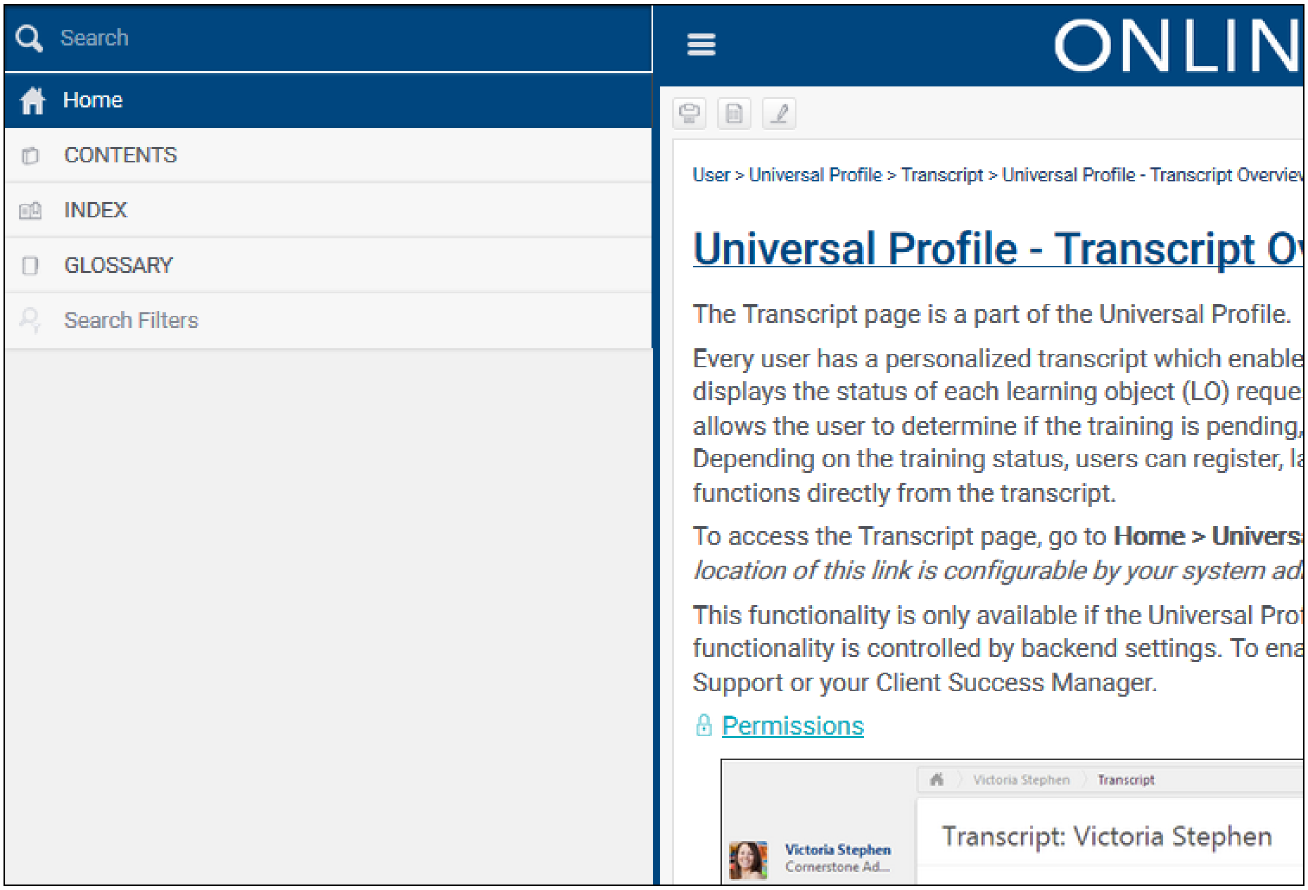
In addition, folders in the Table of Contents are now linked to a landing page in order to reduce the number of clicks that are required to get to your content.

Mobile Friendly Mode

Online Help is now easier to use on a mobile device, such as a mobile phone or tablet. When Online Help is viewed on a smaller screen, the layout is adjusted so that more of the screen is available for viewing content. The table of contents, index, glossary, and search functionality is available in a slide-out menu.

Tap the Menu icon to access the hidden functionality.





Search
Home
CONTENTS
INDEX
GLOSSARY
Search Filters
ONLIN
User > Universal Profile > Transcript > Universal Profile - Transcript Overview
Universal Profile - Transcript O
The Transcript page is a part of the Universal Profile.
Every user has a personalized transcript which enable
displays the status of each learning object (LO) reque
allows the user to determine if the training is pending,
Depending on the training status, users can register, la
functions directly from the transcript.
To access the Transcript page, go to Home > Univers
location of this link is configurable by your system ad
This functionality is only available if the Universal Prof
functionality is controlled by backend settings. To ena
Support or your Client Success Manager.
Permissions
Victoria Stephen
Transcript
Transcript: Victoria Stephen
Victoria Stephen
Cornerstone Ad...

Topic URLs and Favorites Functionality

With the new Online Help redesign, the browser URL dynamically updates so that it always reflects the topic that is currently being viewed. This enables you to easily copy the URL in order to reference it later and to add your favorite topics to your browser's bookmarks. Because of this enhancement, the Favorites functionality is no longer available.

It is important to note that your current favorites will not be stored when Online Help is upgraded. Please note these topics prior to the October '15 release so that you can later add them to your browser's bookmarks.

Real Time Data Warehouse Beta

This invite-only program will provide access to the real-time data warehouse for several custom report categories including Recruiting, Learning and Performance. During the Beta, real-time access will be enabled within Production environments and selected participants will be allowed to test the accuracy and performance of data pulled.

Enablement Notes:

- Invitations will be sent to selected clients during UAT.
- Selected clients will be required to test access in Production.
- Space is limited and based upon Swimlanes, reporting needs and other performance dependencies.

Search Users by Address or Email

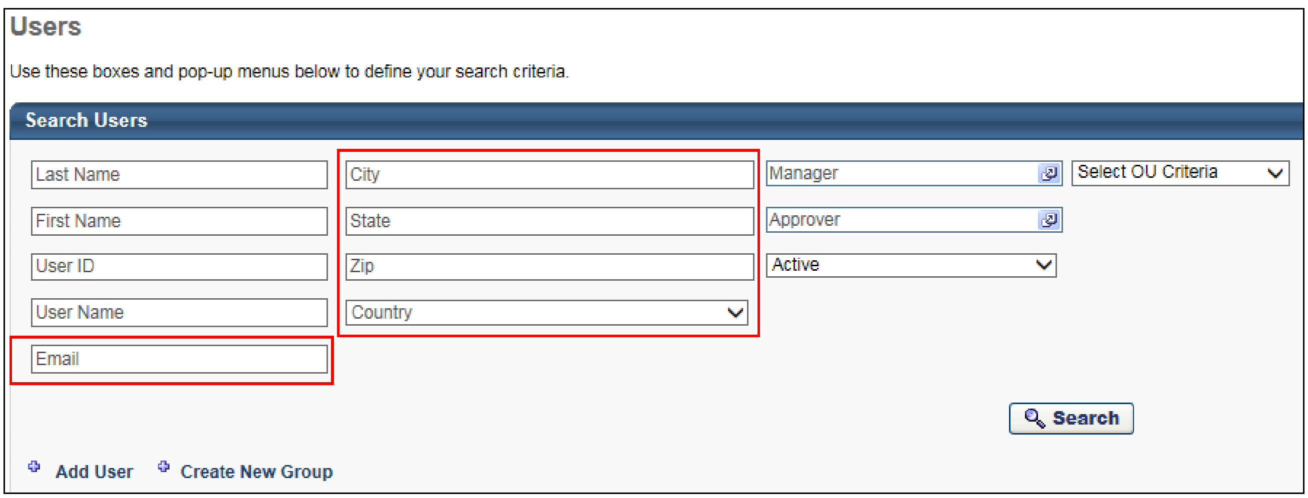
With this enhancement, address fields are added as search criteria on the Users page. In addition, the **Create New Group** option is moved, and using the Tab key to navigate between search fields is enhanced.

Search Criteria Fields

The following address fields are added as search criteria:

- Email
- City
- State
- Zip
- Country

The email search field is only available for users with permission to view or edit a user's email address. The additional address fields are only available for users with permission to view or edit a user's address.



Create New Group

The **Create New Group** option now displays to the right of the **Add User** option below the **SEARCH** button.

Tab Key Navigation

With this enhancement, the Tab key navigates the cursor by column rather than by row. The cursor moves from one search criteria field to the next in the same column, and then continues to the top of the next column and down the column.

When tabbing from the last search criteria field, the cursor moves to the Search button, and then down to the **Add User** option and continues through the options to the right of **Add User**.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
OU Group - Manage	Grants ability to create, copy, and update/edit custom groups of users without allowing ability to manage org units. This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
Users - View	Grants ability to search for and view summary information about users in the portal, via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.	Core Administration
Users - Edit Users Address	Enables administrator to modify the address for a user via the admin/users screen. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration
Users - Edit Users Email	Enables administrator to modify the Email Address for a user via the admin/users screen. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration
Users - View Users Address	Enables administrator to view the address for a user via the Admin/Users screen. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration
Users - View Users Email	Enables administrator to view the Email Address for a user via the Admin/Users screen. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

Link: Reasons for Change in Custom Reports

With this enhancement, a Reason for Change section is added to the User Record Audits report for portals with Link and Effective Dating enabled. This section allows users to report on reasons that changes were made to a user record. In addition, field names are changed in the User Audits section.

Reason for Change Section

The Reason for Change section only displays for users with permission to view modification details. The following fields display in the Reason for Change section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Reason for Change	Displays the Reason for Change captured with User Record modifications.	Text
Reason for Change Category	Displays the category defined for the client-configured Reason for Change.	Text
Reason for Change ID	Displays the configurable ID defined for the client-configured Reason for Change.	Alphanumeric

User Audits Section

The following field names are changed with this enhancement:

- **Change Date** is renamed **Date Changed**
- **Field Modified** is renamed **Field Changed**

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom User Reports - Create	Grants ability to create and edit Custom User reports.	Reports - Analytics
Custom User Reports - View	Grants ability to view results of Custom User reports created by self or shared by others.	Reports - Analytics
User Record Audit	Grants access to User Record Audit report, which displays user record modification history. The selected constraints function independently and are then	Reports - System

Report	combined to determine the availability for this report.	
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

Candidate Communication & Tracking

Candidate Communication & Tracking Overview

With this enhancement, recruiters can now send customizable emails directly to applicants from the Applicant Profile and Manage Applicants pages. A new Email tab is added to the Applicant Profile page to enable recruiters to send and track emails to applicants, and an option to send a customizable email is added to the Manage Applicants page. The History tab is automatically updated when emails are sent/received.

The new functionality will also allow recruiters to receive a copy of each message exchanged with applicants via their email clients (such as Gmail, Outlook, and Yahoo) by selecting the option **Include me on Cc** when typing a new message. Finally, recruiters will be able to reply to applicant responses, both via the Applicant Tracking System (ATS) and via their email client.

Note: *Emails cannot be sent from the Email tab to applicants submitted by a recruiting agency.*

Use Case

1. A recruiter sends a customized email to an applicant from the Applicant Profile page for a job requisition.
2. Or, a recruiter sends a customized email to multiple applicants for the job requisition from the Manage Applicants page.
3. An applicant responds to the email.
4. The recruiter receives a notification in her email client, indicating that the applicant has responded to the email.
5. The recruiter views the applicant's response from the Email or History tab on the Applicant Profile page.

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Send Customizable Email	Grants access to create and send adhoc emails to applicants (both individual and batch emails to group of applicants). The link **Send Customizable Email** from the Summary tab (within the Applicant Profile) and from the drop-down Action menu (within the Manage Applicants page) is available for users with this permission. This permission cannot be constrained.	Recruiting Administration

Applicants: View Email Tab	Grants access to view the Email tab within the Applicant Profile page and all of its content. This permission cannot be constrained.	Recruiting Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a*	Recruiting

	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.*	

Roles

The following permission is added to the Recruiting - Admin role:

- Applicants: Send Customizable Email
- Applicants: View Email Tab

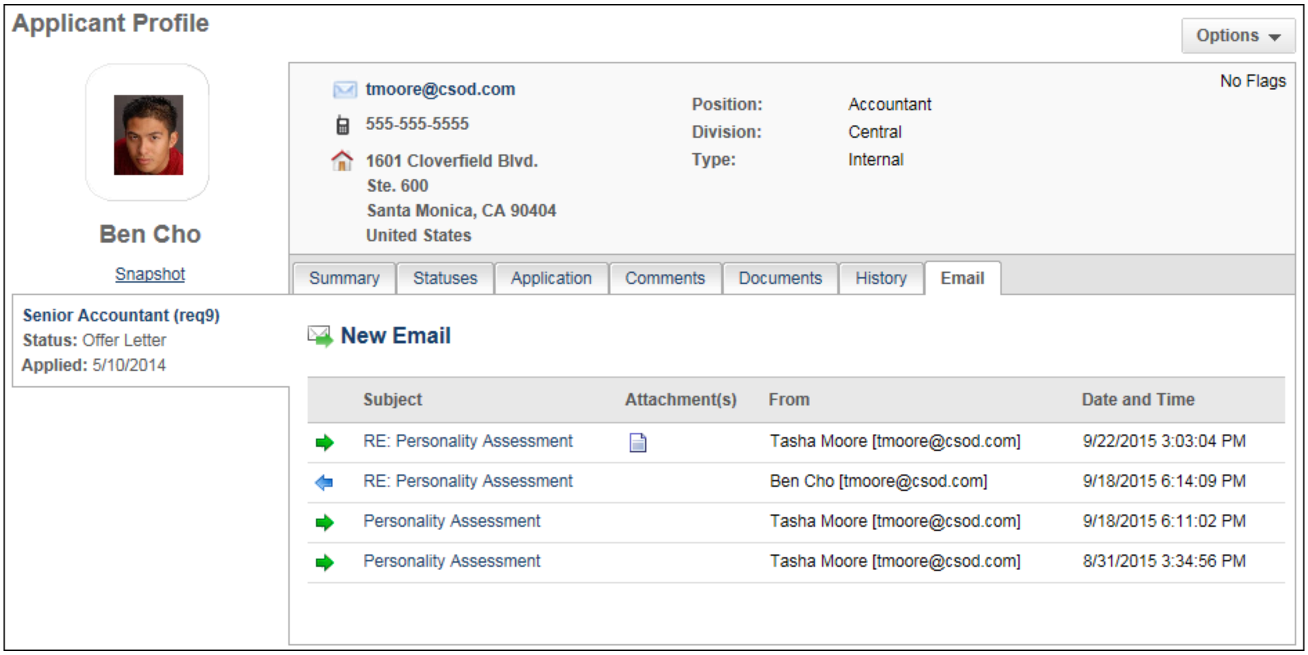
Applicant Profile - Email Tab

The Email tab is a new tab on the Applicant Profile page. From this tab, recruiters can send, view, and track emails to and from applicants.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Send Customizable Email	Grants access to create and send adhoc emails to applicants (both individual and batch emails to group of applicants). The link **Send Customizable Email** from the Summary tab (within the Applicant Profile) and from the drop-down Action menu (within the Manage Applicants page) is available for users with this permission. This permission cannot be constrained.	Recruiting Administration
Applicants: View Email Tab	Grants access to view the Email tab within the Applicant Profile page and all of its content. This permission cannot be constrained.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission*	Recruiting

	cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting



New Email

Click **New Email** to send an email to the applicant. This opens the Send Message page. *See* **Applicant Profile - Send Customizable Email** *on* page 414 *for additional information.*

Emails Table

The table displays the emails that have been sent to the applicant and received from the applicant. The following information displays for each email:

- Email Received Arrow Icon - The back facing arrow indicates that the email was received. Hovering over the arrow displays a tooltip that identifies the email as received.
- Email Sent Arrow Icon - The forward facing arrow indicates that the email was sent. Hovering over the arrow displays a tooltip that identifies the email as sent.
- Subject - This column displays the email subject line. Click the email subject to open the email. This opens the Custom Email Sent or Custom Email Received pop-up, depending on whether or not the email was sent from the Applicant Tracking System (ATS) or received by the ATS.

  From the pop-up, you can view the recipients, subject line, and email string. You can also view attachments by clicking the name of the attachment or the document icon for the attachment. You can also reply to the email by clicking the **REPLY** button, which opens the **Send Message page**. The subject line and email message are not editable from the pop-up.

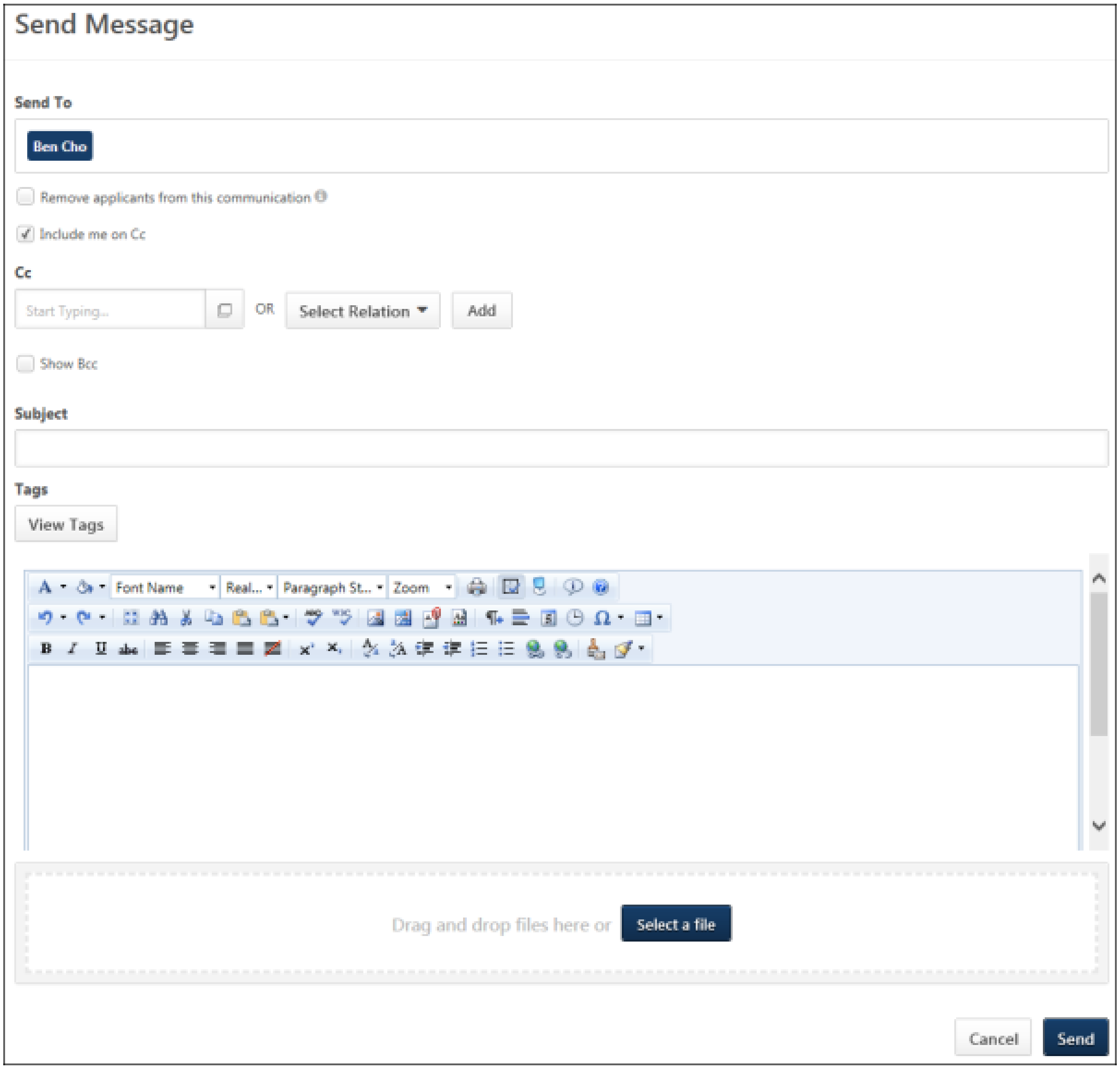
- Attachment(s) - This column displays a document icon for each attachment included in the email. Hover over the icon to view the name of the attachment. Click the icon to open the attachment.
- From - This column displays the name and email address of the sender.
- Date and Time - This column displays the date and time that the email was sent/received.

Applicant Profile - Send Customizable Email

With this enhancement, recruiters can send a customizable email to an applicant from the Applicant Profile page. Recruiters can use the **Send Customizable Email** option that has been added to the Summary tab. Or, recruiters can send a customizable email from the new Email tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Send Customizable Email	Grants access to create and send adhoc emails to applicants (both individual and batch emails to group of applicants). The link **Send Customizable Email** from the Summary tab (within the Applicant Profile) and from the drop-down Action menu (within the Manage Applicants page) is available for users with this permission. This permission cannot be constrained.	Recruiting Administration
Applicants: View Email Tab	Grants access to view the Email tab within the Applicant Profile page and all of its content. This permission cannot be constrained.	Recruiting Administration



Send Email

To send an email to an applicant:

1. Click the **Send Customizable Email** link in the Communication field on Summary tab. Or, click the **New Email** link on the Email tab. This opens the Send Message page. The **Send To** field is prepopulated with the applicant and cannot be modified.
2. Complete the following fields on the Send Message page:
    - **Remove applicants from this communication** - Check the box to exclude the applicant recipients from the email. The email will only be sent to the users who are copied or blind copied.
    - **Include me on Cc** - This option is selected by default. When selected, the sender is copied on each message that is exchanged with the

applicant. **Note:** *The box can be unchecked when replying to applicant messages.*

- **Cc** - Additional users can be copied on the email. To add users, enter a name in the predictive search box or click the Select a user icon to search for and select a user from the Select a user pop-up. Recipients must have a valid email address in the system. The sender can also copy themselves. In addition, you can Cc a relationship to the applicant using the **Select Relation** drop-down. The following relationship options are available:
    - Applicant Reviewer(s)
    - OU Approver
    - Hiring Manager
    - Next Level Hiring Manager
    - Requisition Owner(s)
    - Applicant Interviewer(s)
- **Show Bcc** - Check the box to enable the blind copy options. Enter a name in the predictive search box or click the Select a user icon to search for and select a user from the Select a user pop-up. Recipients must have a valid email address in the system. You can also select a relationship from the **Select Relation** drop-down. The relationships available are defined by the administrator. The sender can also blind copy themselves. The following relationship options are available:
    - Applicant Reviewer(s)
    - OU Approver
    - Hiring Manager
    - Next Level Hiring Manager
    - Requisition Owner(s)
    - Applicant Interviewer(s)
- **Subject** - Enter the subject in the subject line, up to 250 characters.
- **Tags** - Click **View Tags** to view the tags available for the email.
- **Message Box** - Enter the message for the recipients. There is no character limit. For detailed information about the WYSIWYG options available for configuring emails, see the **Email - Create** topic in Online Help.

  You can preview the email by clicking the **PREVIEW** button at the bottom of the message box, which shows the email with tags rendered. When previewing an email with multiple recipients, only the first applicant in the list of recipients is rendered in the preview.
- **Attachments** - Up to three attachments can be added to the email, with a maximum file size per attachment of 5MB. File names cannot exceed 50 characters and cannot include invalid special characters.

Drag and drop a file to the attachment box, or click **SELECT A FILE** to select an attachment from your computer. Attachments can be removed by clicking the remove option for the attachment. **Click to view the acceptable file types.**

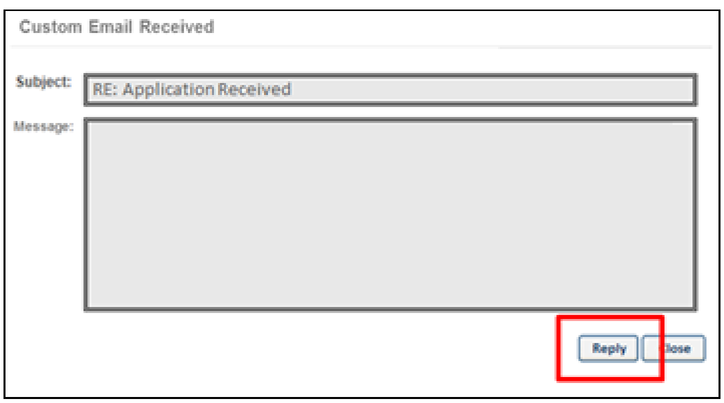
3. Click **SEND** to send the email to the applicant and other recipients. Or, click **CANCEL** to close the email without sending it.

Once the email is sent, the email event is logged on the History tab of the Applicant Profile page. The size of the entire message, including attachments, should not exceed 20MB.

Reply to Email

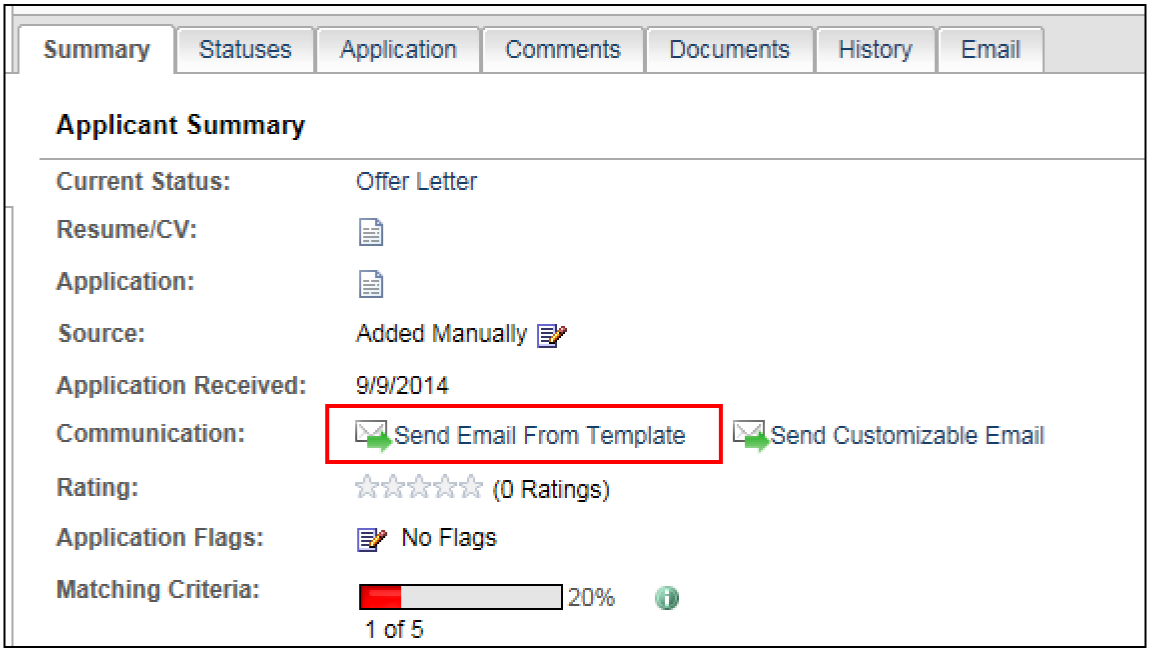
To reply to an email:

1. Open the email by clicking the subject line in the Submit column on the Email tab. This opens a pop-up of the email.
2. Click the **REPLY** button. This opens the Send Message page from which you can enter your message above the email string. You can also add or remove recipients. If the applicant added recipients in their response, then those recipients also display and can also be removed by clicking the remove option for each recipient.



Applicant Profile - Send Email from Template

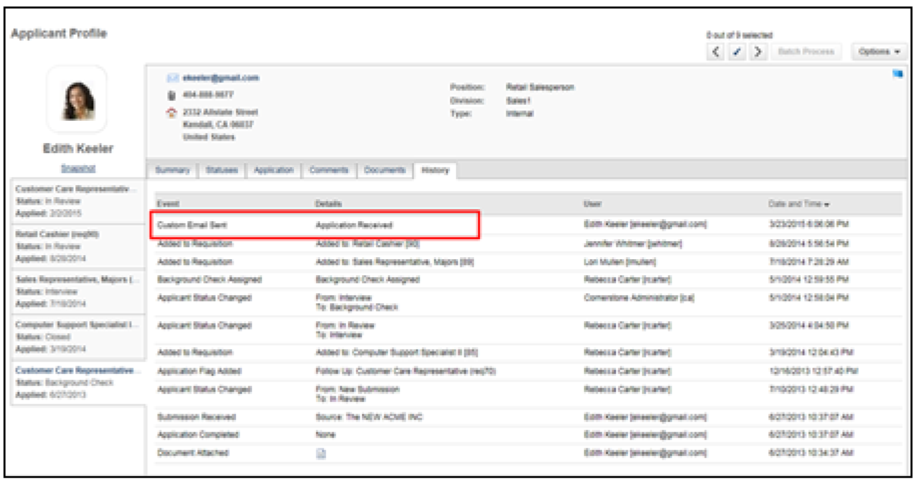
With this enhancement, the **Send Email** option on the Summary tab of the Applicant Profile page is renamed **Send Email From Template**. There are no functionality changes to this option.



History Tab

The History tab tracks emails sent to and from the applicant. The following information displays for each email:

- Event Title - This column displays the name of the event as Custom Email [Sent] [Received].
- Details - This column displays "RE: <Email Subject>." Hover over the subject to view the full subject line.
- 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 - Send Customizable Email

With this enhancement, a **Send Customizable Email** option is added to the Actions drop-down on the Manage Applicants page. This option allows recruiters to send a customizable email to one or more applicants.

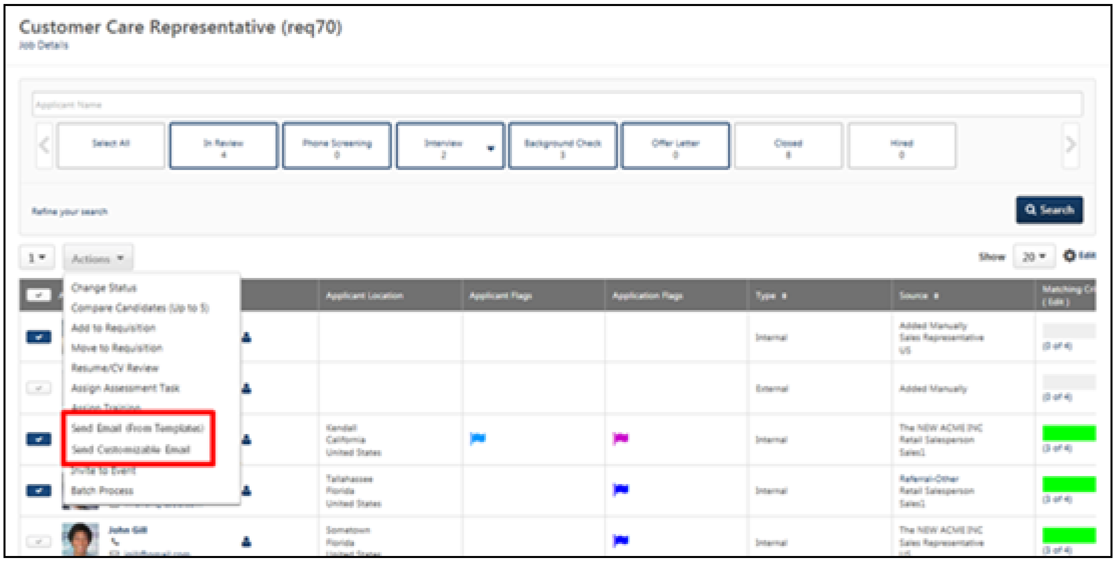
To access the Manage Applicants page, go to **Recruit > Manage Requisition**. On the Manage Job Requisitions page, locate the requisition for which you would like to manage candidates. From there, click the linked number of candidates in the Applicants column.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Send Customizable Email	Grants access to create and send adhoc emails to applicants (both individual and batch emails to group of applicants). The link **Send Customizable Email** from the Summary tab (within the Applicant Profile) and from the drop-down Action menu (within the Manage Applicants page) is available for users with this permission. This permission cannot be constrained.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission*	Recruiting

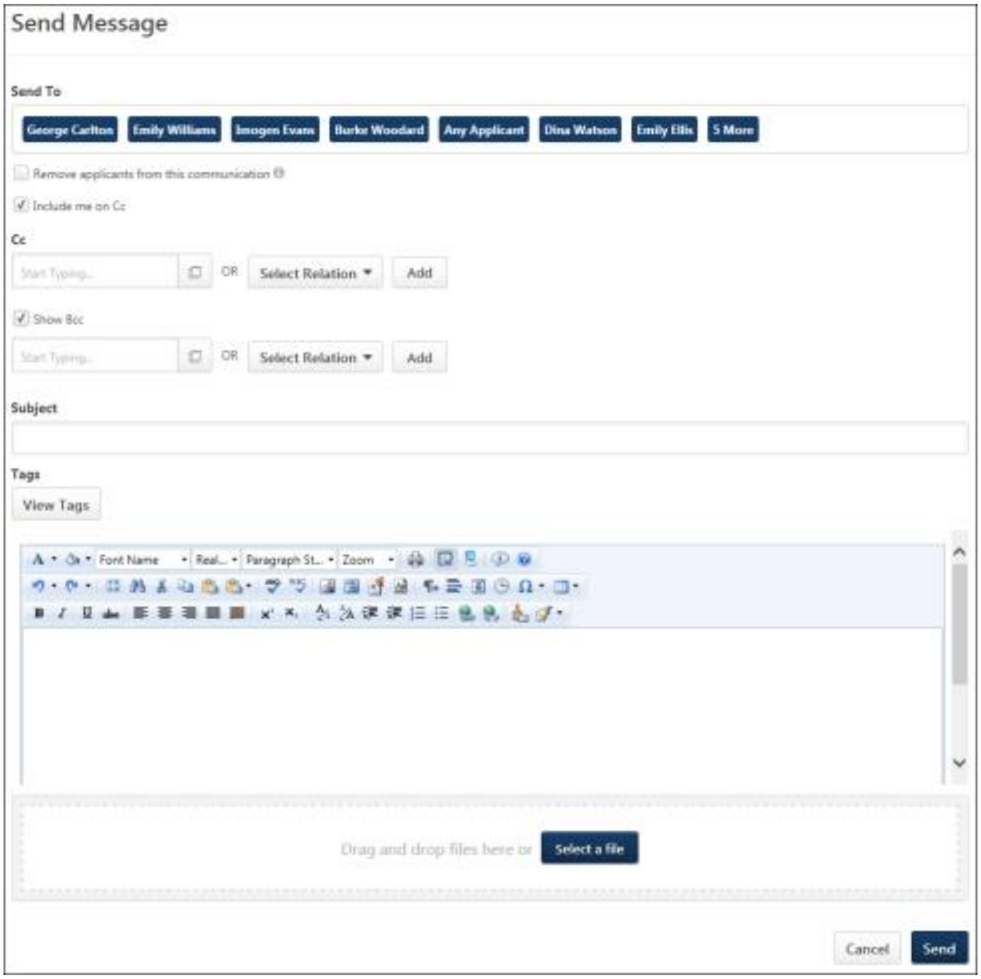
	cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting



To send a customizable email:

1. Select up to 50 applicants by checking the box to the left of the applicant's name.
2. Click the **Send Customizable Email** link in the **Actions** drop-down. This opens the Send Message page. The **Send To** field is prepopulated with the selected applicants and cannot be modified. Up to seven applicant names display. If there are more than seven recipients, then the number of additional recipients displays to the right of the seventh recipient's name.



3. Complete the following fields on the Send Message page:
   - **Remove applicants from this communication** - Check the box to exclude the applicant recipients from the email. The email will only be sent to the users who are copied or blind copied.
   - **Include me on Cc** - This option is selected by default. When selected, the sender is copied on each message that is exchanged with the applicant. **Note:** *The box can be unchecked when replying to applicant messages.*
   - **Cc** - Additional users can be copied on the email. To add users, enter a name in the predictive search box or click the Select a user icon  to search for and select a user from the Select a user pop-up. Recipients must have a valid email address in the system. The sender can also copy themselves. You can remove users by clicking the remove option for the user. In addition, you can Cc a relationship to the applicant using the **Select Relation** drop-down. The following relationship options are available:
     - Applicant Reviewer(s)

    - OU Approver
    - Hiring Manager
    - Next Level Hiring Manager
    - Requisition Owner(s)
    - Applicant Interviewer(s)
  - **Show Bcc** - Check the box to enable the blind copy options. Enter a name in the predictive search box or click the Select a user icon to search for and select a user from the Select a user pop-up. Recipients must have a valid email address in the system. The sender can also blind copy themselves. You can remove users by clicking the remove option for the user. In addition, you can blind copy a relationship to the applicant using the **Select Relation** drop-down. The following relationship options are available:
    - Applicant Reviewer(s)
    - OU Approver
    - Hiring Manager
    - Next Level Hiring Manager
    - Requisition Owner(s)
    - Applicant Interviewer(s)
  - **Subject** - Enter the subject in the subject line, up to 250 characters.
  - **Tags** - Click **View Tags** to view the tags available for the email.
  - **Message Box** - Enter the message for the recipients. There is no character limit. For detailed information about the WYSIWYG options available for configuring emails, see the **Email - Create** topic in Online Help.

    You can preview the email by clicking the **PREVIEW** button at the bottom of the message box, which shows the email with tags rendered. When previewing an email with multiple recipients, only the first applicant in the list of recipients is rendered in the preview.

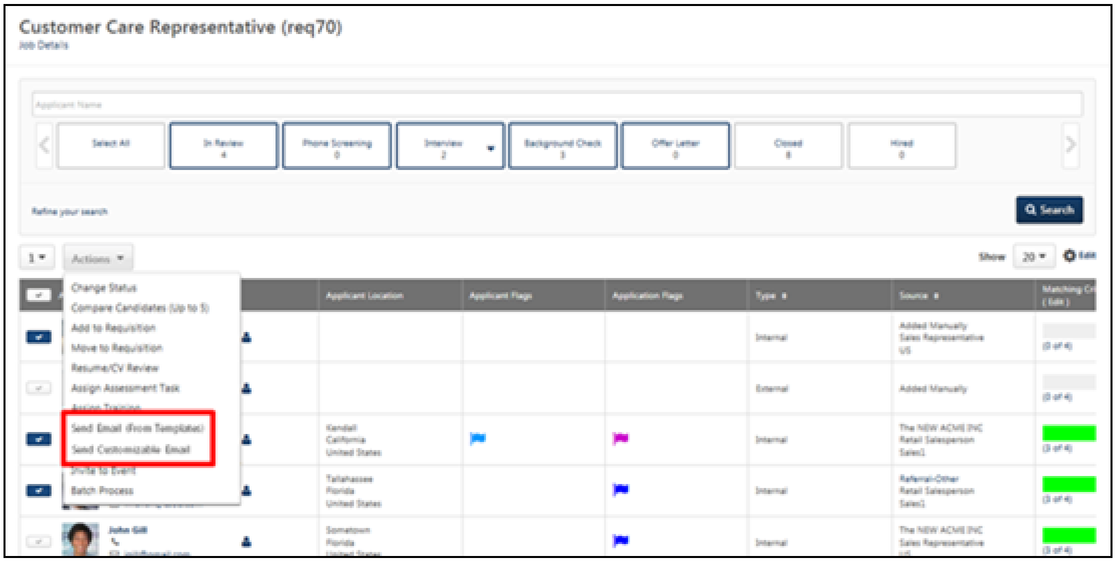
  - **Attachments** - Up to three attachments can be added to the email, with a maximum file size per attachment of 5MB. File names cannot exceed 50 characters and cannot include invalid special characters. Drag and drop a file to the attachment box, or click **SELECT A FILE** to select an attachment from your computer. Attachments can be removed by clicking the remove option for the attachment. **Click to view the acceptable file types.**

3. Click **SEND** to send the email to the applicant and other recipients. Or, click **CANCEL** to close the email without sending it.

Once the email is sent, the email event is logged on the History tab of the Applicant Profile page. The size of the entire message, including attachments, should not exceed 20MB.

Manage Applicants - Send Email From Template

With this enhancement, the **Send Email** option in the **Actions** drop-down on the Manage Applicants page is renamed **Send Email From Template**. There are no functionality changes to this option.



Candidate Search Query Usability Enhancements

Candidate Search Query Usability Enhancements Overview

With this enhancement, the Candidate Search Query functionality is updated to enable recruiters to search by individual resume/CV fields, as well as attachments to the application. In addition, a predictive search feature is added to the search field to help recruiters find specific resume fields more quickly. When terms are entered in the search field, a drop-down appears, showing a list potential resume field matches that can be selected to include in the search.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This is an administrator permission.	Core Administration
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
Recruiting: Search Candidates	Grants ability to access Candidate Search page for recruiting, which enables searching for internal candidates and external candidates who have applied for open positions. This permission also enables the Invite to Apply action item to appear in the Actions drop-down on the Search Candidates - Search Results page. This permission can be constrained by OU and User's OU.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job	Recruiting

	requisition. This permission can be constrained by OU, User's OU, and Grade.	

Candidate Search Query - Advanced Search Tab

With this enhancement, the search functionality on the Advanced Search tab is updated to add predictive search capabilities. Previously, the tab allowed recruiters to search resume criteria by adding a search criteria box using the **Add resume search criteria** option. This enhancement removes that option and replaces it with a predictive search bar.

The predictive search bar helps recruiters quickly find the resume fields they would like to include in the search. When terms are entered in the search field, a drop-down appears, showing a list of up to 20 potential resume field matches based on the characters entered. Recruiters can select the fields from the list to include in the search.

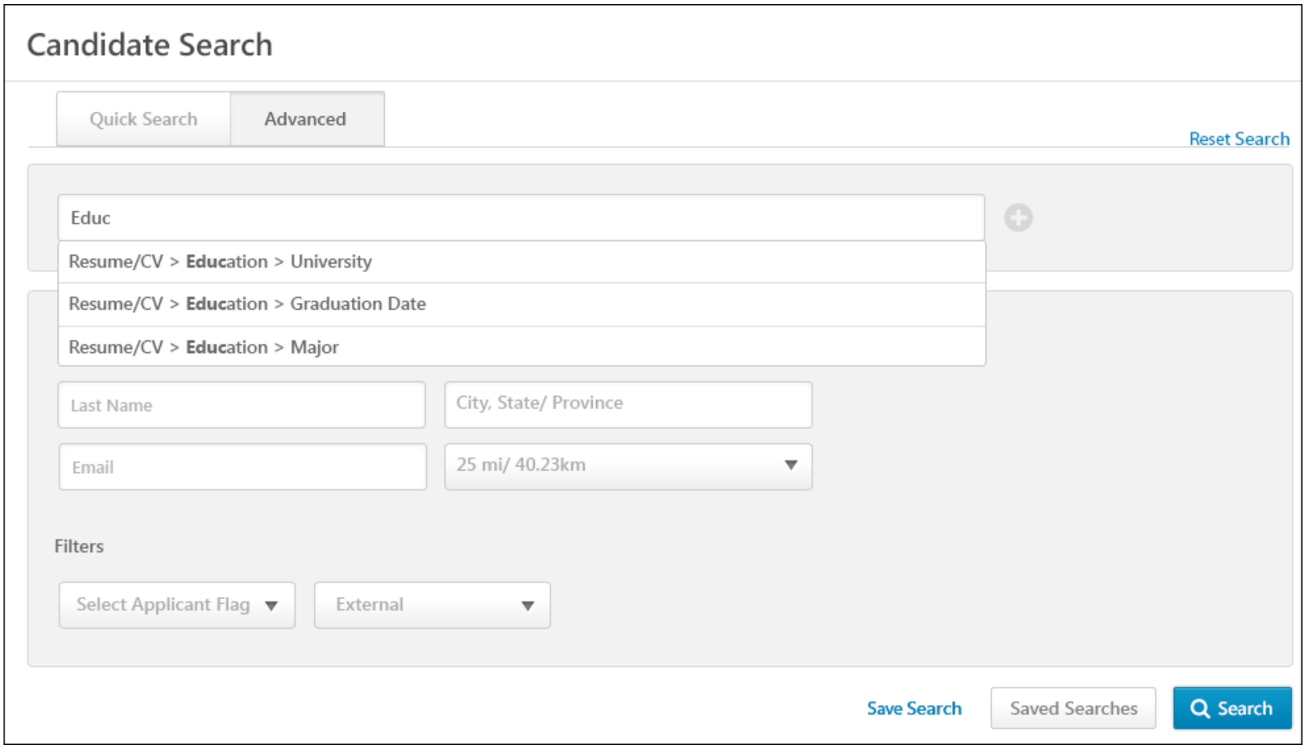
In addition, when searching for candidates on the Advanced Search tab, resume attachments can also be searched. This broadens the search options and helps recruiters to find candidates who meet the search criteria.

Note: *The predictive search feature is only available on the Advanced Search tab of the Candidate Search Query page. The feature is not available on the Quick Search tab.*

To access the Advanced 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	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



Search Resume/CV Fields

To search for default and custom resume/CV fields to include in the candidate search, enter the search terms in the predictive search field, a minimum of three characters. For example, to find specific fields in the Education section of the resume/CV, a recruiter can enter "educ." The system automatically searches for matches and displays up to 20 results in a drop-down according to the field's relevance to the search terms. Default resume/CV fields display as "Resume/CV > [Resume/CV Section Title] > [Resume/CV Field Title]."

To add the field as search criteria, click anywhere in the search result row. Then, click the plus icon to the right of the search bar. This adds the field as search criteria. Additional resume/CV fields can be added by searching for and selecting the field, and then clicking the plus icon to the right of the search bar.

For portals with multiple languages enabled, the localized field title displays in the list. If a localized title is not configured for a field, then the field displays in the default language of the field.

Additional Criteria Options

As with existing functionality, once the criteria is added, additional options are available to further define the criteria. With this enhancement, the Resume/CV field name is displayed at the top of the search criteria box.

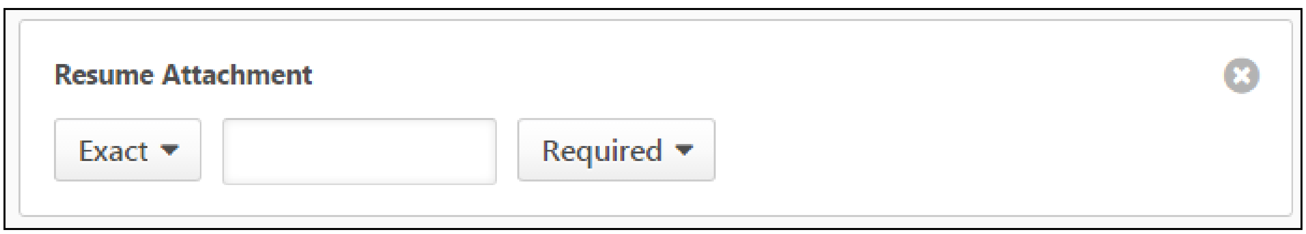
For detailed information about configuring the additional criteria options, see the Additional Criteria Options topic in Online Help.

Resume/CV Field Availability

The fields that display in the drop-down list are fields that are active resume/CV fields. Fields are defined by the administrator on the **Define Section** page when configuring resume sections in Succession.

Search Resume Attachments

In order to search through resume attachments (which is the existing functionality that was released in July 2015), all or part of the words "Resume Attachment" can be entered into the predictive search field. Select the Resume Attachment option, and then click the plus icon to add the field as search criteria. This allows you to define the search criteria for candidate attachments.



Additional Criteria Options

Once a resume/CV field or attachment is selected on the Advanced Search tab, additional options are available to refine the search criteria. The options that are available are dependent upon the type of field selected for the search criteria.

To access the Advanced 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	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

Checkbox Field

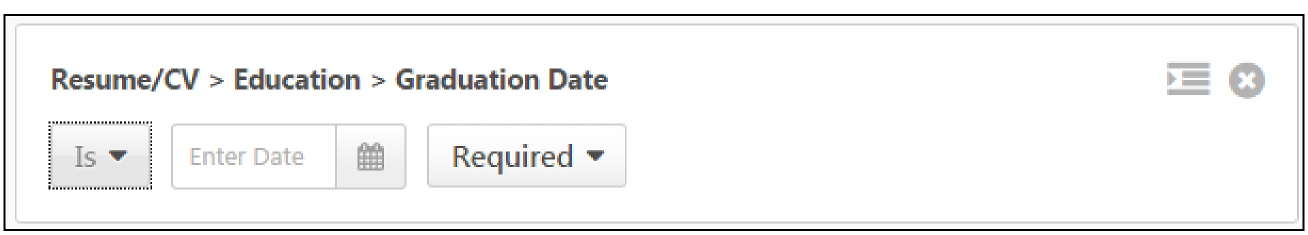
The following criteria options are available for checkbox field types:

- Is - This option is the only value for checkbox fields and is selected by default. This option applies to the Checked criteria field selection to indicate that the checkbox is checked or unchecked.
- Checked - Select one of the following options:
  - Checked - This option is selected by default. When selected, candidates only appear in the search results if they check the box.
  - Unchecked - When selected, candidates only appear in the search results if the candidate does not check the box.
- Boolean Operators - Select one of the following operators:
  - Required - This option indicates that a candidate will only appear in the search results if they check the box.
  - Optional - This option indicates that a candidate may or may not appear in the search results if they check the box.
  - Exclude - This option indicates that a candidate will not appear in the search results if they check the box.

Date Field - On/Before/After

The following criteria options are available for date field types that apply to on, before, or after dates:

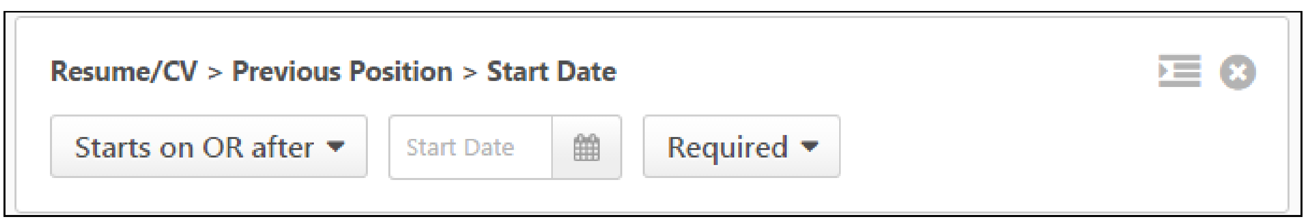
- Equality Operators - Select one of the following operators:
  - Is - When selected, the search results include internal and external users that entered the selected date.
  - On OR after - When selected, the search results include internal and external users that entered the date value on or after the Start Date.
  - On OR before - When selected, the search results include internal and external users that entered the date value on or before the End Date.
  - Between - When selected, the search results include internal and external users that entered a date that is on or between the selected dates.
- Date - Define a date from the calendar. This is a required field.
- Boolean Operators - Select one of the following operators:
  - Required - This option indicates that a candidate will only appear in the search results if they match the selections in the equality operator and date fields.
  - Optional - This option indicates that a candidate may or may not appear in the search results if they match the selections in the equality operator and date fields.
  - Exclude - This option indicates that a candidate will not appear in the search results if they match the selections in the equality operator and date fields.



Date Field - Start/End/Between

The following criteria options are available for date field types that apply to start and/or end dates:

- Equality Operators - Select one of the following operators:
    - Starts on OR after - When selected, the search results include internal and external users that entered a date value on or after the Start Date.
    - Ends on OR before - When selected, the search results include internal and external users that entered a date value on or after the End Date.
    - Starts OR ends between - When selected, the search results include internal and external users that entered a date range that intersects with the dates selected in the search query. Example:[1]
    - Starts AND ends between - When selected, the search results include internal and external users that entered a date range that is completely contained by the dates selected in the search query. Example:[2]
- Date - Select a date or date range, depending on the selection made in the equality operator field. This is a required field.
- Boolean Operators - Select one of the following operators:
    - Required - This option indicates that a candidate will only appear in the search results if they match the selections in the equality operator and date fields.
    - Optional - This option indicates that a candidate may or may not appear in the search results if they match the selections in the equality operator and date fields.
    - Exclude - This option indicates that a candidate will not appear in the search results if they match the selections in the equality operator and date fields.



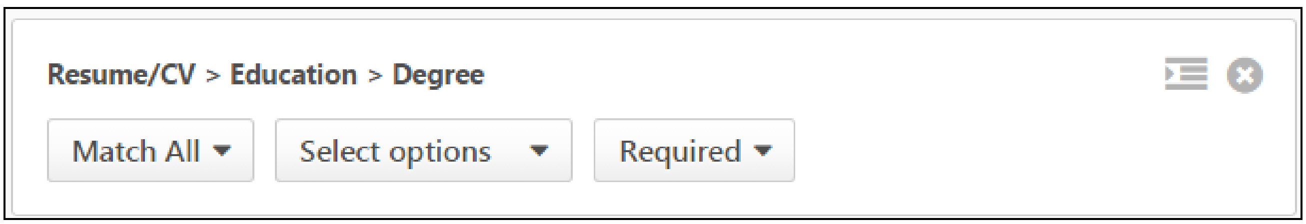
[1] A candidate entered 1 Jan 2015 to 1 June 2015 and the recruiter enters 1 May 2015 to 1 July 2015, the candidate is included in the search results because part of the date range the candidate entered intersects with part of the date range that the recruiter entered.

[2] For example, if a candidate entered 1 May 2015 to 1 June 2015 and the search user enters 1 May 2015 to 1 July 2015, the candidate is included in search results because the entire date range the candidate entered is contained by the date range the search user entered.

Drop-Down Field

The following criteria options are available for drop-down fields:

- Matching - The following matching options are available:
    - Match All - Select this option to find candidates who match all of the selections in the **Select Options** field.
    - Match Any - Select this option to find candidates who match any of the selections in the **Select Options** field.
- Select Options - This drop-down displays the available for the field that are configured when **defining attributes for a resume section**. The options appear in alphabetical order. Select one or more individual options or check the **Select All** box.
- Boolean Operators - Select one of the following operators:
    - Required - This option indicates that a candidate will only appear in the search results if they have the selected options in their resume/CV.
    - Optional - This option indicates that a candidate may or may not appear in the search results if they have the selected options in their resume/CV.
    - Exclude - This option indicates that a candidate will not appear in the search results if they have the selected options in their resume/CV.

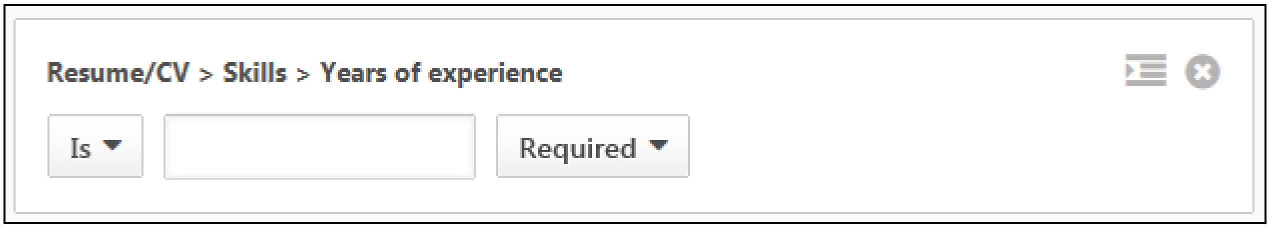


Numeric Field

The following criteria options are available for numeric field types:

- Equality Operators - Select one of the following operators:
    - Is
    - Less Than
    - Greater Than
    - Less Than or Equal
    - Greater Than or Equal
- Numeric Text Field - Enter the value based on the operator selected. This field accepts up to five digits with up to two decimal places (inclusive). This means that if two decimal places are included in the number, then only three digits can be present to the left of the decimal place. This is based on existing functionality throughout the Recruiting module. This is a required field.
- Boolean Operators - Select one of the following operators:

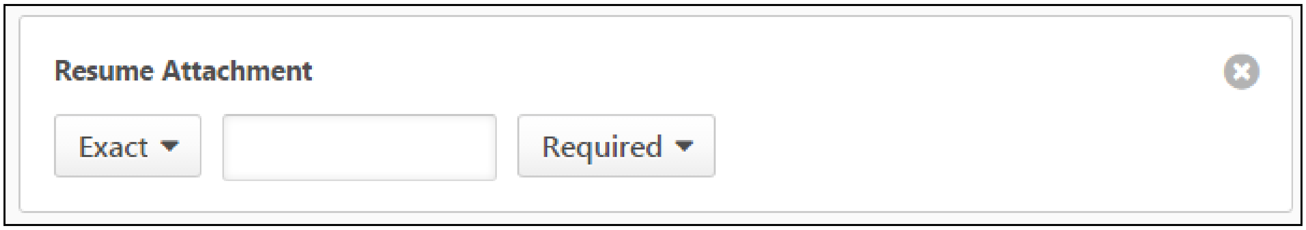
  - Required - This option indicates that a candidate will only appear in the search results if they match the numeric entry in the text field.
  - Optional - This option indicates that a candidate may or may not appear in the search results if they match the numeric entry in the text field.
  - Exclude - This option indicates that a candidate will not appear in the search results if they match the numeric entry in the text field.



Short Text/Scrollable Text/OU Selector Fields

The following criteria options are available for short text fields and scrollable text fields in which candidates have entered a response into a text box and which allow recruiters to search for key words from the candidate's text responses:

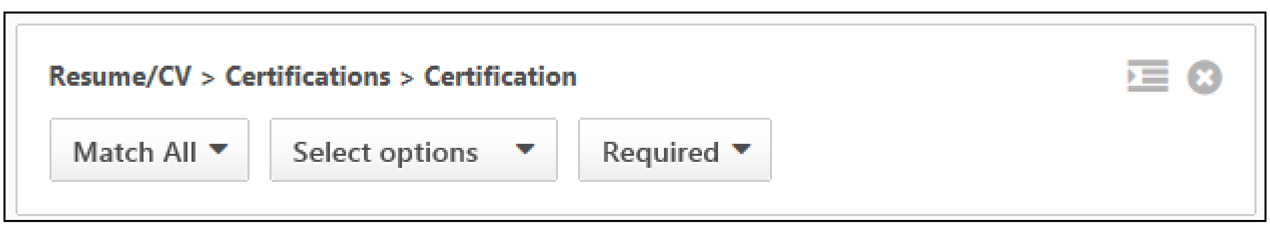
- Equality Operators - Select one of the following equality operators:
  - Exact - When selected, the search results only include candidates that exactly match the search term entered. If multiple search terms are entered, then the search matches the terms as a phrase (equivalent to using quotation marks "" in Quick Search).
  - Starts With - When selected, the search results include candidates that match any partial search term entered by the candidate in the text box.
- Text Field - 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. If multiple terms are entered with a space between each term, then the terms are searched as a phrase. The search does not require that all words of the candidate's entry in the text field on the application be included in the text field on the Advanced Search tab. For example, if "Product" is entered by the recruiter in the search field, then the system matches terms on the application such as Product Manager and Product Marketing Manager.
- Boolean Operators - Select one of the following operators:
  - Required - This option indicates that a candidate will only appear in the search results if they match the entry in the text field.
  - Optional - This option indicates that a candidate may or may not appear in the search results if they match the entry in the text field.
  - Exclude - This option indicates that a candidate will not appear in the search results if they match the entry in the text field.



Attributes

The following criteria options are available for attributes (i.e., educational degrees, certifications, languages, etc.):

- Matching - The following matching options are available:
  - Match All - Select this option to find candidates who match all of the attributes selected in the **Select Options** field.
  - Match Any - Select this option to find candidates who match any of the attributes selected in the **Select Options** field.
- Select Options - This drop-down displays the active attribute options available for the field that are configured when **defining attributes for a resume section**. The options appear in alphabetical order. Select one or more individual options or check the **Select All** box.
- Boolean Operators - Select one of the following operators:
  - Required - This option indicates that a candidate will only appear in the search results if they have the selected attribute options in their resume/CV.
  - Optional - This option indicates that a candidate may or may not appear in the search results if they have the selected attribute options in their resume/CV.
  - Exclude - This option indicates that a candidate will not appear in the search results if they have the selected attribute options in their resume/CV.



Search Tips

- Unmapped resume section values can still be searchable. The user may find a discrepancy looking at resume section values for an applicant on Applicant Profile > Resume/CV page, which shows only mapped resume fields.

- Date formats that are stored in the system are not always the same as the formats presented to the user in the UI. If a user searches by “12/29/2014” from quick search, they may not return any results, since the field stored in the database is 2014/12/29. Advanced Search should be used when searching for dates because it handles these scenarios and searches against all date formats.
- Using the “Match All” operator in Advanced Search (for a multi-select drop-down control) along with the “Optional” priority operator is treated the same as all selected attributes values being “Required” within a search result.
- Using the “Exact” operator in Advanced Search returns results even if the entered word is part of a phrase with a searched field. For example, a search for EXACT Role = ‘Manager’ would return a result for a resume having Role = ‘QA Manager.’

Saved Searches

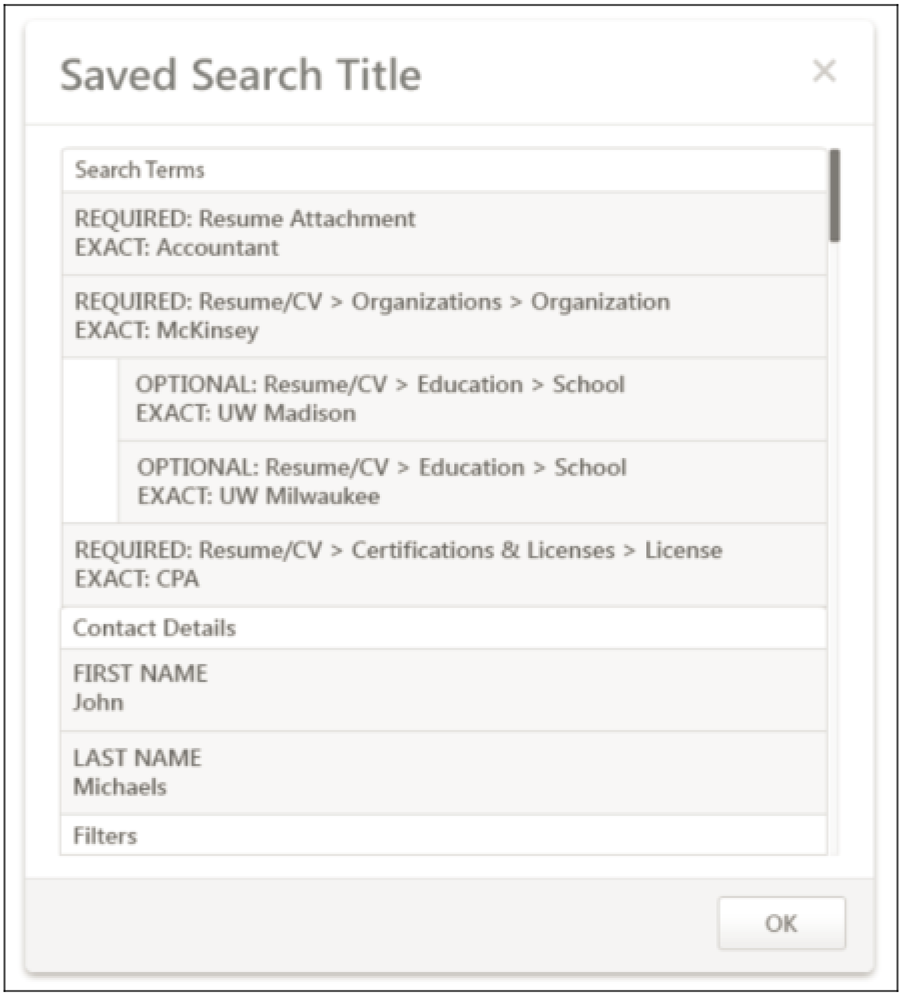
When advanced searches are saved using the Save Search functionality, the search criteria are saved and display when viewing the saved search by clicking the **View Advanced Search Criteria** link on the Saved Searches page. The criteria are divided into the following sections:

- Search Terms - This section displays the search criteria defined in the predictive search section on the Advanced Search tab.
- Contact Details - This section displays the search criteria defined in the contact/location information section on the Advanced Search tab. This section only displays if at least one contact/location search criteria is defined.
- Location - This section displays the geolocation information defined in the location information section on the Advanced Search tab. This section only displays if at least one geolocation search criteria is defined.
- Filters - This section displays the search criteria defined in the Filters section on the Advanced Search tab.

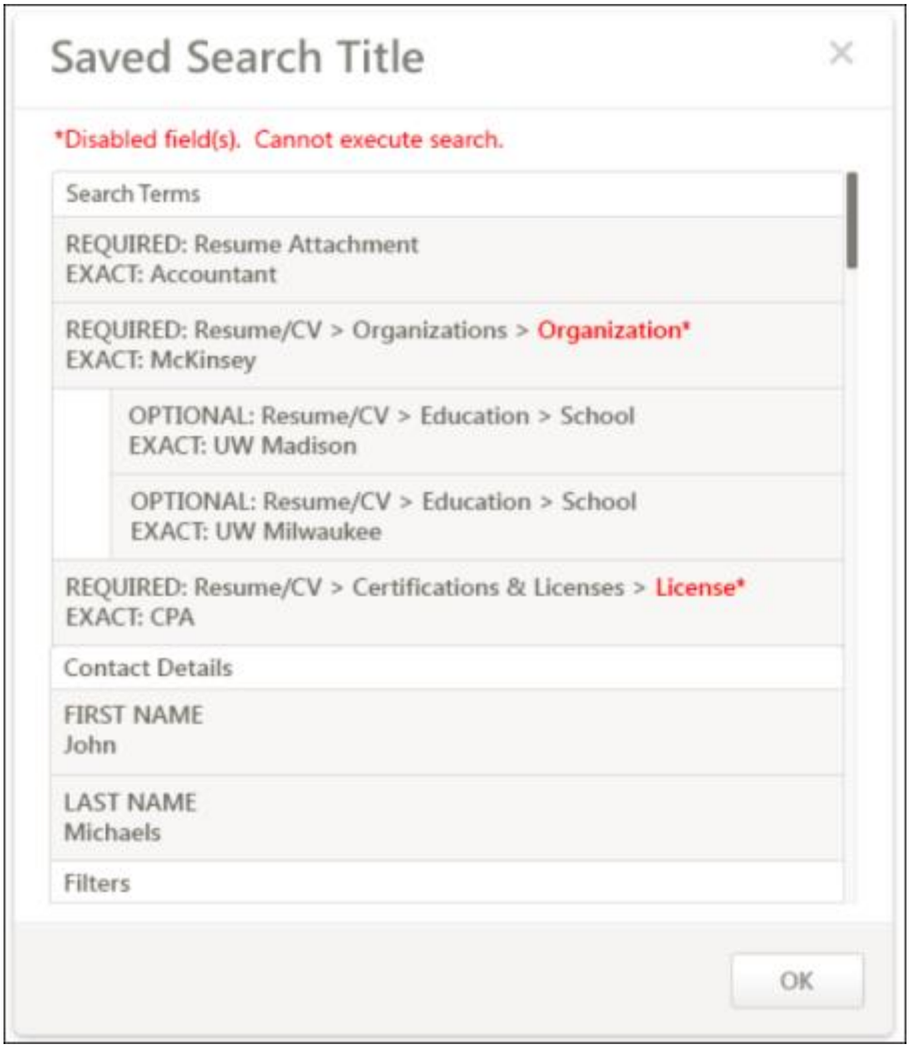
Once the search is saved, the search can only be executed if all resume/CV fields in the search criteria are active. If any of the fields are inactive, then the search cannot be executed until the inactive fields are activated.

Hovering over a criteria section will display the full path of the resume/CV field to which the criteria apply.

Saved Search - Active Fields



Saved Search - Inactive Fields

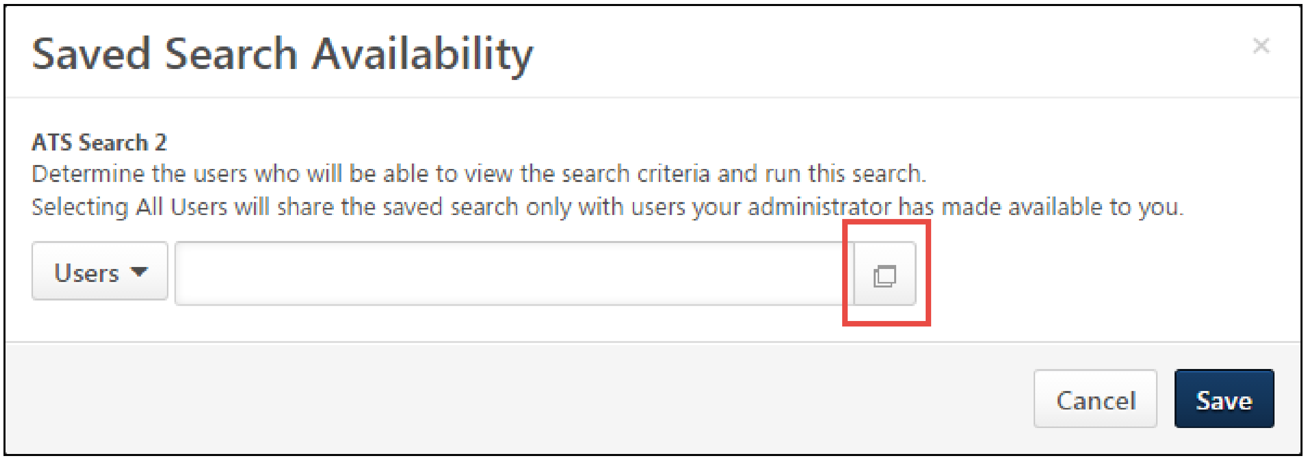


Deleting a Shared Search

If a shared search is deleted by a user with whom the search is shared, then the shared search is also deleted from the user who created and shared the search.

Saved Search Availability Pop-Up

When searching for users with whom to share the search, the predictive search field in the Saved Search Availability pop-up can only be used if there are no constraints on the your permission to share searches. If you have constraints on your permission to share searches, then you can search for users by clicking the Select icon to select users from a list of available users or organizational units (OU).


Saved Search Availability
ATS Search 2
Determine the users who will be able to view the search criteria and run this search.
Selecting All Users will share the saved search only with users your administrator has made available to you.
Users
Cancel
Save

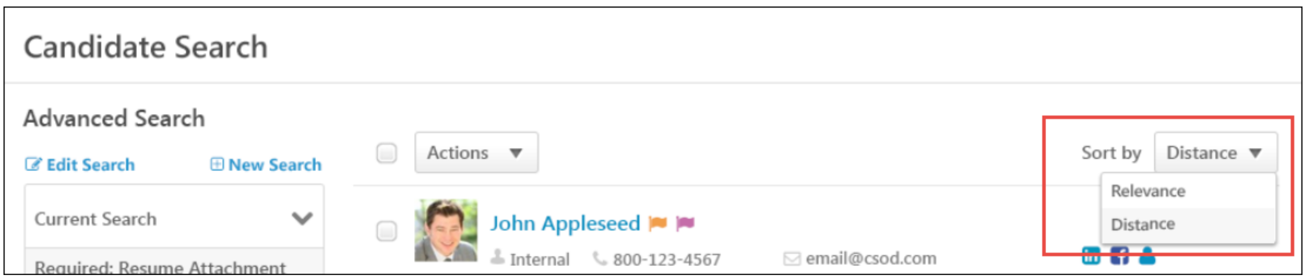
Search Results

With this enhancement, functionality and features available on the search results page are updated and added as part of this enhancement.

Sort Search Results

A sorting feature is added to the upper-right corner of the search results page for quick searches and advanced searches. This option allows you to sort the results by the following:

- Relevance - This option sorts candidates by their relevance to the keywords entered in the search bar. Relevance is determined by multiple factors based on the Elastic Search relevance algorithm.
- Distance - This option only displays if location criteria are defined for the search. This option sorts candidates by their distance from the value entered in the **Country**, **City, State/Province**, and **Postal Code** search criteria fields.



Recruiting Agency Submission

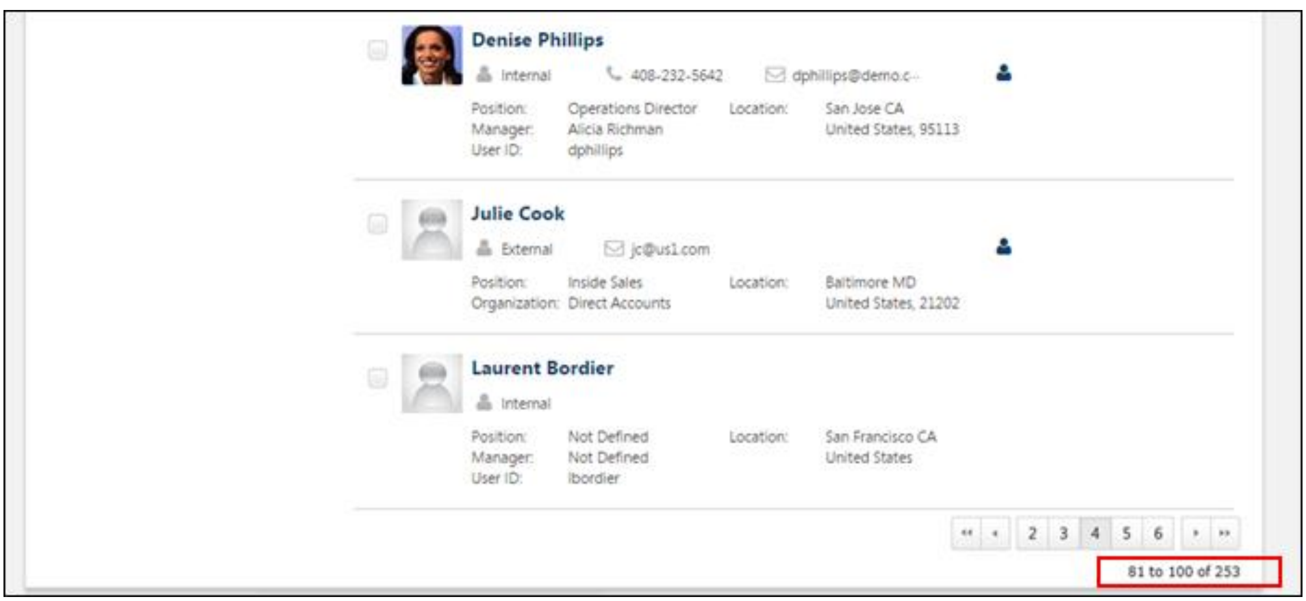
For candidates submitted by a recruiting agency, the **source credit setting** is respected when searching for candidates. In addition, candidates who opt out of candidate search are not visible in the search results.

Criteria Panel - Current Search Section

The Current Search section on the criteria panel for searches that are executed on the Advanced Search tab displays the additional equality operators that are available with this enhancement. Hovering over a criteria section will display the full path of the resume/CV field to which the criteria apply.

Total Search Results Number

With this enhancement, the total number of search results displays below the results at the bottom-right of the page. If there is more than one page of search results, then the total results displays along with the number of results per page. A maximum of 1000 search results can be displayed. If more than 1000 search results are returned, a message is displayed at the top of the page indicating that the search criteria should be refined.



Export to Excel

With this enhancement, when using the Export to Excel action, the Excel output displays the resume/CV field names and the additional equality operators that are available with this enhancement.

In addition, a table is added above the search results to display the criteria defined in the Advanced Search Query Builder. The table shows the field name, equality operator, field value, priority (required, optional, exclude), and grouping (if the criteria are grouped).

Candidate Search Results

Advanced Search Criteria			
First Name:	John		
Last Name	Doe		
Email:			
Country:			
City, State/Province			
Postal Code			
Radius:			
Source:	Resume/CV		
Search User:	Sam Smith		
Search Date:	12/25/2014		
Displaying	2	out of	300

Field	Operator	Value	Priority	Group
Resume/CV > Experience > Position	Starts With	Manufac	Exclude	Group
Resume/CV > Experience > Organization	Exact	Intel, Microsoft, Apple, Intuit	Required	Group
Resume/CV > Education > School	Exact	UW Madison	Optional	
Resume/CV > Degree	Is	Associate Degree, Master's Degree	Optional	Group
Resume/CV > Certifications/Licenses	Exact	CPA	Required	Group
Resume/CV > Education > Graduation Date	On or before	07/01/2013	Required	
Resume/CV > Years of Study	Between	01/01/2010 - 01/01/2015	Required	
Resume/CV > Key Accomplishments > End Date	Present		Required	
Resume Attachment	Exact	Manager	Required	

User ID	Applicant Profile	Type	First Name	Last Name	Phone	Email	Position	Manager	Organization	Applicant Flags	Applicant Status	Country	Location	Postal Pode	Distance (mi/km)
768 885 948	View	Internal	John	Doe	(909)455-4545	johndoe@email.com	Technical Writer	John Mahoney	A1 Marketing	Good for Marketing, Willing to Relocate, Short	In Review, Background Check, Offer Letter	United States	Minneapolis, MN	78456	25/40.23
768 885 456	View	Internal	John	Mahoney	(909)445-4545	jmahoney@email.com	Technical Writer	John Marx	A1 Marketing	Good for Marketing, Willing to Relocate, Short	In Review, Background Check, Offer Letter	United States	Minneapolis, MN	78456	25/40.23

Enhanced Job Applicant Web Service

The Job Applicant web service enables organizations to retrieve candidate information from the system. Organizations specify an applicant status and other search criteria to retrieve the candidate's information.

With this enhancement, the Job Applicant web service is enhanced to enable organizations to search for candidates by custom statuses. The CurrentStatus parameter now accepts a custom status as long as the status is defined in the system.

Implementation

This Web Service is automatically available to all portals that have purchased it.

If you have purchased Web Services usage, but need access to this specific one, please contact CSOD via a GPS case to enable.

If you have not purchased Web Services at all, please contact Sales or Client Executive to purchase.

Onboarding

Launch Onboarding Usability Enhancements

With this enhancement, the following usability enhancements are made to the Launch Onboarding page:

- **View Required Fields** - Fields that are required now display with a red asterisk to the left of the field.
- **Start Date** - The **Start Date** field is no longer populated with the current date by default. The field will be blank, and recruiters can select the start date from the calendar or enter a date.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Manage Onboarding	Allows user to launch the onboarding process from applicant to employee and view onboarding progress from the Applicant Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding

Pre-Screening Talent Score

Pre-Screening Talent Score Overview

With this enhancement, pre-screening questions can now be scored in order to more accurately screen out applicants during the application process. Administrators can define a minimum score that applicants must meet in order to continue in the application process. Recruiters will then be able to view and sort all applicants within a job requisition.

In addition, the user interface (UI) for the Pre-Screening Question Bank has been updated to match current styles.

Migration

All existing pre-screening questions and categories will be migrated to the new UI. The score for all existing questions will be 0 upon implementation but can be modified by the administrator.

In addition, upon implementation of this enhancement, if an applicant has started an application that includes pre-screening questions but has not yet submitted the application and they click the **BACK** button within the Pre-Screening Questions step, their in-progress work on the Pre-Screening Questions section of the application will be lost. The applicant will not be notified that they need to restart the Pre-Screening Questions section on the application.

Use Case

- An administrator wants to create and set scoring for a new pre-screening question and survey in order to more efficiently process job applicants.
- A recruiter wants to prioritize and automatically disposition candidates.
- A recruiter wants to add a Pre-Screening Survey column to their Manage Applicants page view in order to quickly review and process top applicants.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Application Workflow Template - Manage	Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Application Workflow	Grants ability to access and view	Recruiting

Template - View	Application Workflow Templates.	Administration
Pre-Screening Question Bank - Manage	Grants ability to access and manage Pre-Screening Question Bank.	Recruiting Administration
Custom Recruiting Report - Create	Grants ability to create and edit Custom Recruiting reports. This permission can be constrained by Division, Position, and Location.	Reports - Analytics
Custom Recruiting Report - View	Grants ability to view results of Custom Recruiting reports created by self or shared by others. This permission can be constrained by Division, Position, and Location.	Reports - Analytics
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when*	Recruiting

	editing a requisition.	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting

Pre-Screening Question Bank Management

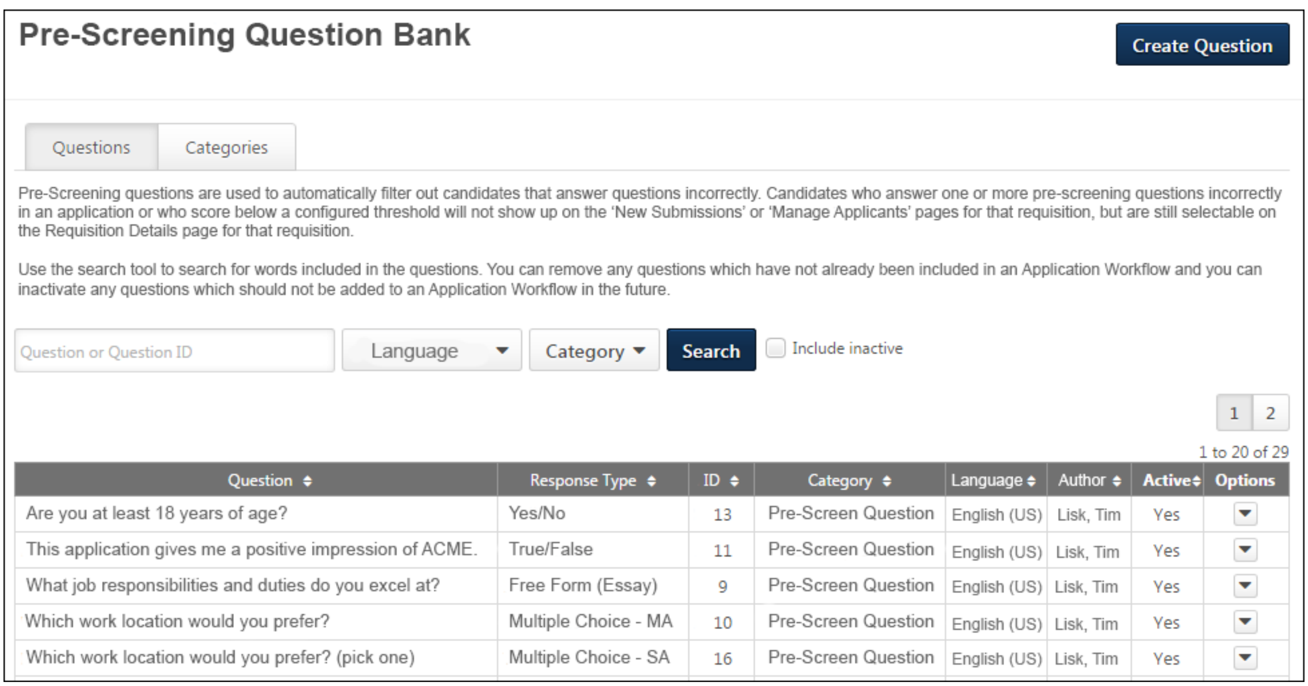
With this enhancement, the user interface (UI) for the Pre-Screening Question Bank page is redesigned. The page is now organized into two tabs:

- Questions - From the Questions tab, you can create, view, and manage pre-screening questions. *See* **Pre-Screening Question Bank - Questions Tab** *on* page 455 *for additional information.*
- Categories - From the Categories tab, you can create, view, and manage question categories. Previously, categories were managed via the Question Categories pop-up. *See* **Pre-Screening Question Bank - Categories Tab** *on* page 457 *for additional information.*

To manage pre-screening questions, go to **Admin > Recruit > Pre-Screening Question Bank**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Pre-Screening Question Bank - Manage	Grants ability to access and manage Pre-Screening Question Bank.	Recruiting Administration



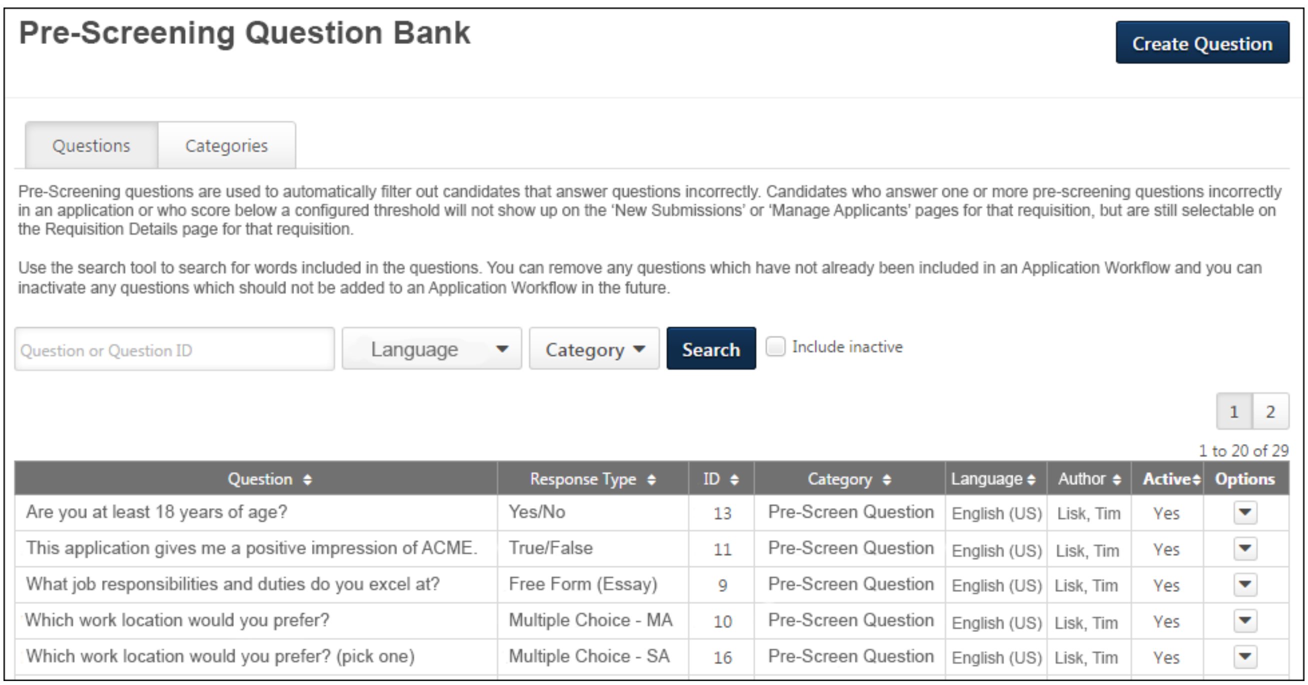
Pre-Screening Question Bank - Questions Tab

From the Questions tab, you can create, view, and manage pre-screening questions. With this enhancement, the user interface (UI) for the Questions page and for the process of creating questions is updated to match current styles.

To manage pre-screening questions, go to **Admin > Recruit > Pre-Screening Question Bank**. The Questions tab opens by default.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Pre-Screening Question Bank - Manage	Grants ability to access and manage Pre-Screening Question Bank.	Recruiting Administration



Create Question

The option to create a new question is now a button and displays in the upper-right corner of the page. Click **CREATE QUESTION** to create a new pre-screening question.

Filters

The functionality of the filter options is unchanged with this enhancement. The following filters are available:

- **Question/Question ID** - The watermark for the filter is changed from "Search" to "Question or Question ID."
- **Language** - This filter now displays as a button drop-down and is moved to the immediate right of the question/ID search field.
- **Category** - This filter now displays as a button drop-down and is moved to the immediate right of the language filter.
- **Search** - The UI for the **SEARCH** button is updated.
- **Include Inactive** - This is a new option. Check the box to display inactive questions in the questions table.

Questions Table

There are no functionality changes to the questions table. The options in the Options column are now accessed by clicking the drop-down button and selecting the option.

Edit Question

With this enhancement, clicking the Edit option opens the Create Question page. Previously, clicking the option opened the Edit Question pop-up. When editing a question, a warning message appears if the question has been used in an application workflow to indicate that the meaning of the question should not be changed.

Preview Question

When previewing the questions, scoring information does not display. The response that is identified as the correct response is not indicated in the preview.

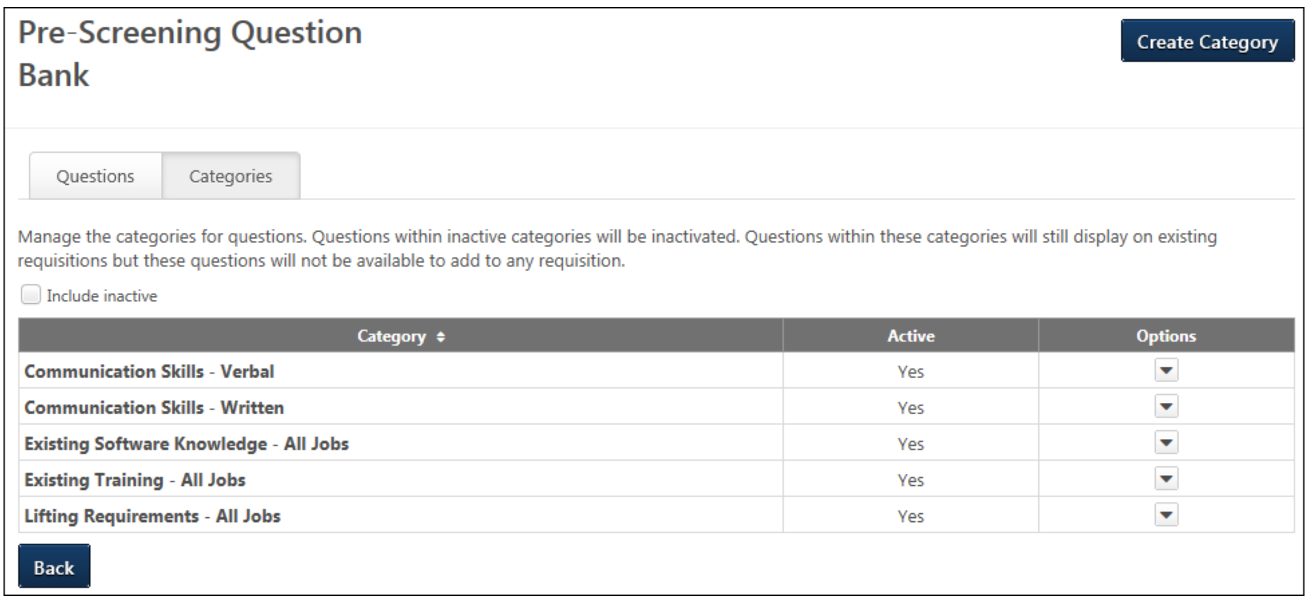
Pre-Screening Question Bank - Categories Tab

From the Categories tab, you can create, view, and manage question categories. Previously, categories were managed via the Question Categories pop-up. In addition, with this enhancement, categories can only be inactivated rather than deleted.

To manage pre-screening questions, go to **Admin > Recruit > Pre-Screening Question Bank**. Then, click the Categories tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Pre-Screening Question Bank - Manage	Grants ability to access and manage Pre-Screening Question Bank.	Recruiting Administration



Create Category

To create a new category, click the **CREATE CATEGORY** button. This opens the Create Category page. *See* **Pre-Screening Question Bank - Create Category** *on* page 466 *for additional information.*

Include Inactive

Check the **Include Inactive** box to display inactive categories in the table.

Categories Table

The categories table displays all of the active pre-screening question categories. If the **Include Inactive** box is checked, then the table also displays inactive categories. By default, the categories display in alphabetical order.

The following information displays for each category:

- Category - This column displays the name of the category. This column is sortable.
- Active - This column displays the active status of the category. The active status for an individual question can be managed by clicking the **Edit** option in the Options column.
- Options - The following option is available in the Options column:
  - Edit - Click the **Edit** option to edit the category. This opens the Edit Category pop-up. The category name and active status can be modified. Click **SAVE** to save the changes.
  - Delete - This option displays for categories that do not contain any pre-screening questions. Click Delete to delete the category.

Back

Click the **BACK** button to return to the Questions tab. You can also click the Questions tab to open the tab.

Pre-Screening Question Bank - Create Question

With this enhancement, the **Question Properties pop-up** is changed to a multi-step Create Question page. In addition, scoring can be configured for question response options.

To create a question, click the **CREATE QUESTION** button on the **Pre-Screening Question Bank** page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Pre-Screening Question Bank - Manage	Grants ability to access and manage Pre-Screening Question Bank.	Recruiting Administration

Create Question - Select Field Type

Select one of the following field types for the question:

- Yes/No
- True/False
- Multiple Choice/Single Answer
- Multiple Choice/Multiple Answer
- Free Form (Essay)

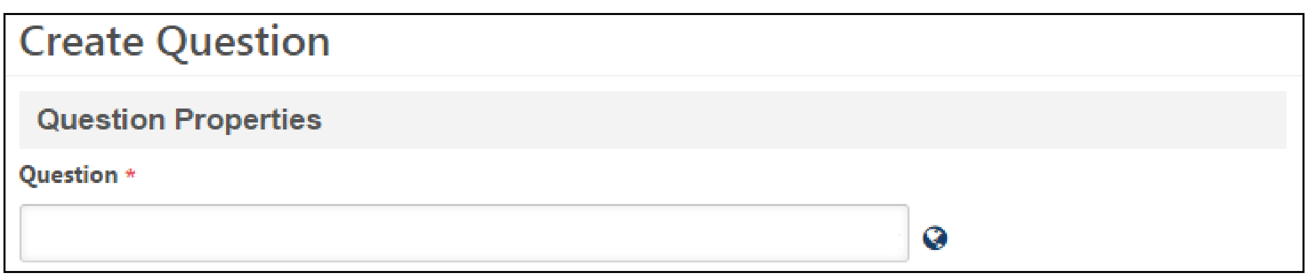
This is a required field.

Create Question - Question Properties

Complete the following fields in the Question Properties section:

Question

Enter the question, up to 4000 characters. You can click and drag the text box to resize the box. 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.

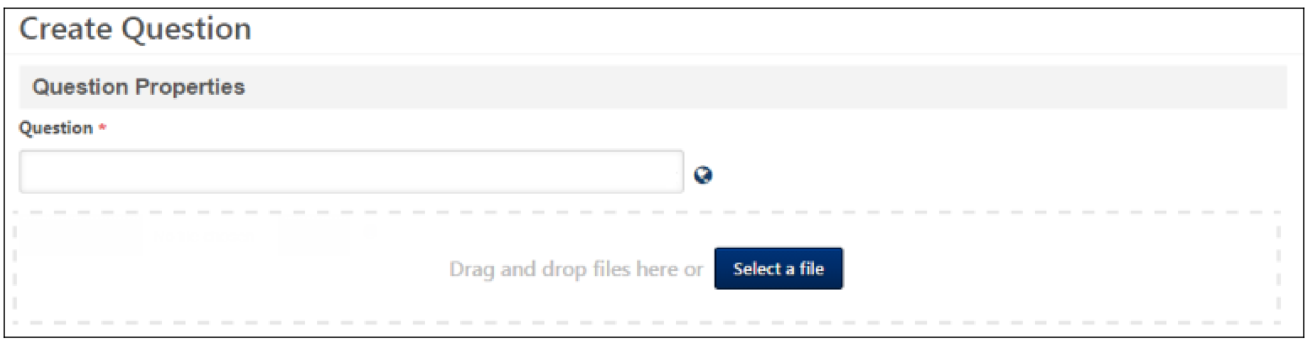


Drag and Drop Files

This is a new field for pre-screening questions. This field enables administrators to attach an image or media file to the question.

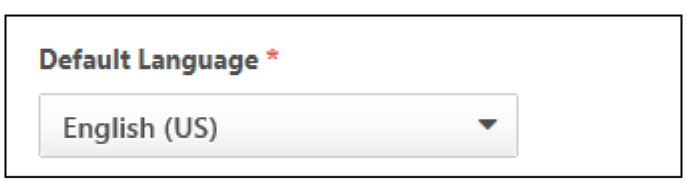
To attach a file, drag and drop the file to the field or click **SELECT A FILE** to search for and select a file from your computer. The following file types are accepted:

- .bmp
- .flv
- .gif
- .jpg
- .mp4
- .png
- .wmv - **Note:** *This file type is not compatible with Chrome and Firefox.*



Default Language

Select the default language for the question from the drop-down. The default language is the language in which the item will be presented to the applicant. For example, the default language for a question is English (US). The administrator has also specified German and Japanese translations for the question and response items. When an applicant completes the application in English (US), German, or Japanese, the applicant will see the corresponding translation. Applicants who are completing the assessment in any other language will see the default English (US) version of the question and response options.



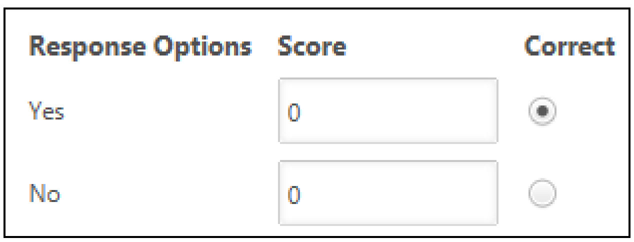
Response Options

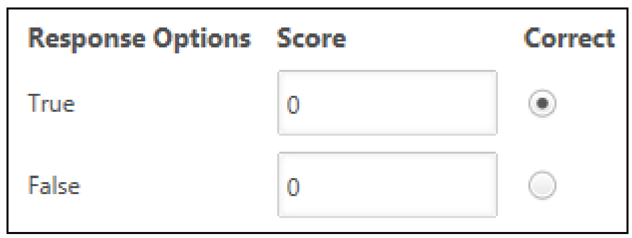
Note: *This field does not display for Free Form (Essay) question types.*

Yes/No and True/False Question Types

For Yes/No and True/False question types, the following information and options display:

- **Response Options** - This column displays the Yes/No and True/False response options for applicants.
- **Score** - This field allows you to enter a score for the question. Enter a whole number between 0 and 100. This is not a required field.
- **Correct** - This is a required field. Select this option if the response choice is the correct response. The first response is selected by default. When an applicant selects a response that is defined as the correct response and the screen out option is enabled for the question in the application workflow, then the applicant remains in the applicant pool. If the applicant selects the other response and the screen out option is enabled for the question in the application workflow, then the applicant is removed from the applicant pool.





Multiple Choice/Single Response and Multiple Choice/Multiple Response

For Multiple Choice/Single Response and Multiple Choice/Multiple Response question types, the following information and options display:

- **Order** - Enter a number to order the responses. A response with the order of 1 is displayed at the top, followed by 2, then 3, and so on.
- **Response Options** - These are the multiple choice options that are displayed to the user. Enter the response text for each option you would like to include (e.g., for the question "What colors are in a rainbow?" possible response choice text may be Red, Blue, Green, Purple, Orange, Yellow, White, Black). The field accepts up to 250 characters.
- **Translate** - If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **Add** - Click the Add icon to add response options.
- **Delete** - Click the Delete icon to delete the response option.
- **Score** - This field allows you to enter a score for the question. Enter a whole number between 0 and 100. This is a required field.

Best Practice: *As a best practice, when configuring scores for Multiple Choice/Multiple Response questions, set the responses that are incorrect to 0.*

Best Practice: *When using question and* ***survey scoring****, it is a best practice to first configure scores for response options within the question(s), and then configure question weights within the survey(s).*

- **Correct** - This is a required field. Select this option if the response choice is the correct response. Multiple correct answers may be provided for Multiple Choice/Multiple Response question types, but at least one correct response must be selected. If "None of the above" is included as an option, you may select that as the correct response.

  The first response is selected by default. When an applicant selects a response that is defined as the correct response and the screen out option is enabled for the question in the application workflow, then the applicant remains in the applicant pool. If the applicant selects an incorrect response and the screen out option is enabled for the question in the application workflow, then the applicant is removed from the applicant pool. If the screen out option is disabled for the question in the application workflow, the Correct status is ignored.
- **Always Display** - Check the box to always display this option as a response choice. This field is only applicable if you select the **Display Subset of Responses** option in the Advanced Options section, in which not all response choices are displayed.

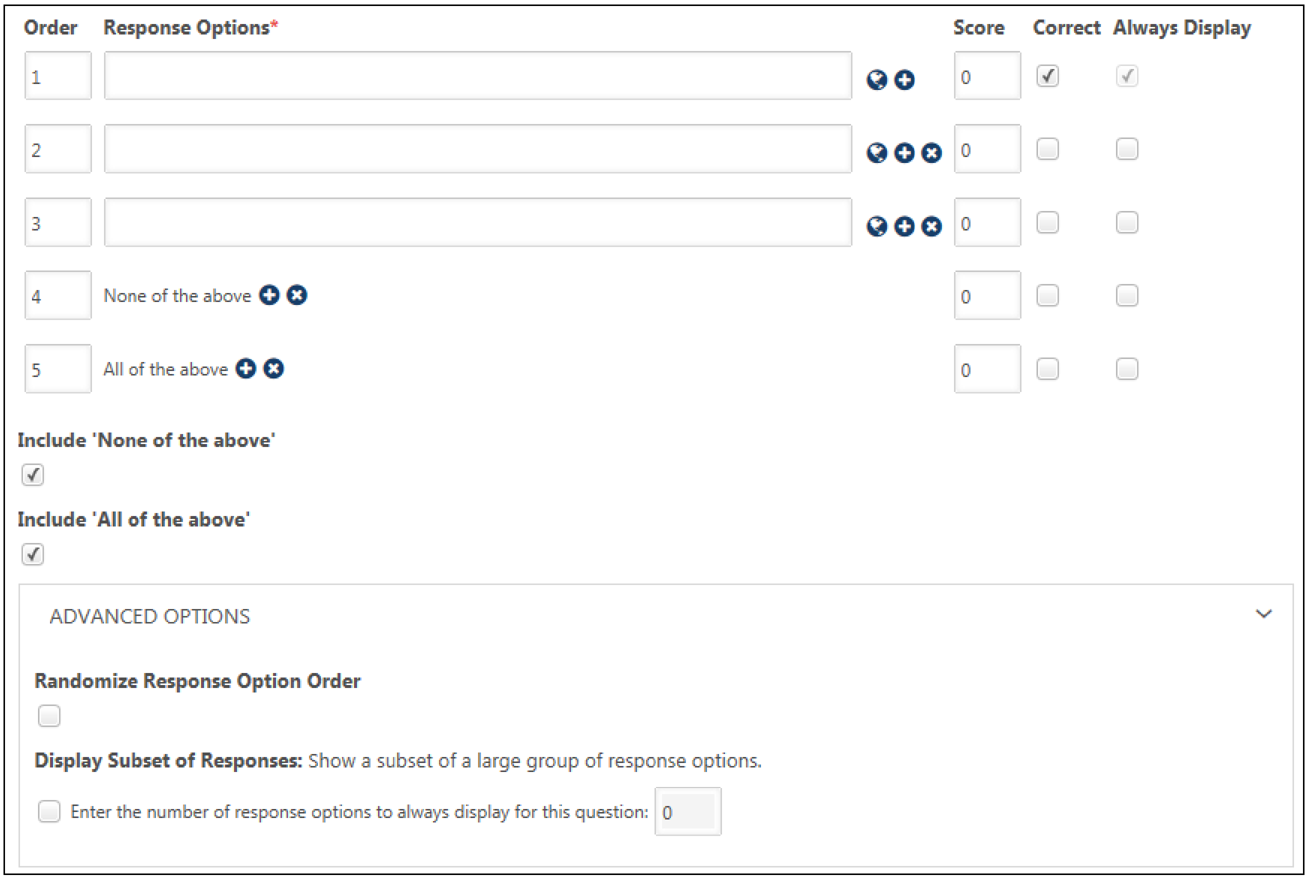
  If the **Correct** box is checked for the response option, then the **Always Display** box is grayed out and not selectable. If the **Correct** box is unchecked, then the **Always Display** box is automatically unchecked.
- **Include 'None of the above'** - Select this option to include a 'None of the above' response option for the question. This adds the response to the list of response options. You can define the order and score for the response and can also select it as the correct response and have it always display.
- **Include 'All of the above'** - Select this option to include an 'All of the above' response option for the question. This adds the response to the list of response options. You can define the order and score for the response and can also select it as the correct response and have it always display.

Advanced Options

The following advanced options are available:

- **Randomize Response Option Order** - When this option is selected, the order in which response options are displayed to applicants is random/unique for each applicant. When this option is unchecked, response options are presented in the order indicated in the Order column. **Note:** *For* *a randomized response order, the 'None of the above' and 'All of the above' options are always the second to last and last options respectively. This order cannot be modified.*

- **Display Subset of Responses** - Check the box to only display the specified number of response options to each applicant. Enter the number of responses to display in the numeric text box. The number cannot be greater than the total number of responses and must be greater than or equal to the number of responses that are selected to always display. If this option is not selected, then all response options to display to applicants.



Category

Select the appropriate category for the question from the drop-down. This is used to organize and filter the questions by subject area. The categories that are available to select are the active categories for pre-screening questions.

Active

Questions are active by default. When active, the question can be used in application workflows. Uncheck the box to inactivate the question. Inactive questions cannot be used in application workflows. If a question is inactivated after it has been used on an application workflow, the question remains on the existing workflow but cannot be added to new workflows.

Answer Explanation

Enter the explanation for the correct answer, up to 4000 characters. Providing an answer explanation serves as an internal note for administrators working on the question. This field is not visible to the applicant. You can click and drag the text box to resize the box.

Back/Save/Cancel

Click **BACK** to return to the Select Field Type page.

Click **SAVE** to save the question.

Click **CANCEL** to close the Create Question page without saving the question.

Edit Question

As with existing functionality for editing pre-screening questions, all fields are editable unless the question has been used in an application workflow. If the question has been used, then the **Language**, **Order**, **Correct**, **Always Display**, **Include 'None of the above'**, **Include 'All of the above'**, and the fields in the Advanced Options section cannot be edited.

Copy Question

When copying questions, the Question field is copied, and "- Copy" is appended to the end of the question.

Pre-Screening Question Bank - Create Category

With this enhancement, categories are now created from a new Create Category pop-up. Previously, categories were created from the Question Categories pop-up.

To create a category:

1. Click the **CREATE CATEGORY** button on the Categories tab. This opens the Create Category pop-up.
2. Enter the category name in the **Name** field, up to 50 characters. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
3. Check or Uncheck the **Active** box to define the active status of the category. When checked, the category is active and questions within the category can be added to application workflows. When unchecked, the category is inactive and questions within the category cannot be added to application workflows.
4. Click **SAVE** to save the category. Or, click **CANCEL** to close the pop-up without saving the category.

Application Workflow Templates

With this enhancement, pre-screening questions can now be scored in order to more accurately screen out applicants during the application process. The Prescreen Questions action item on the application workflow is updated to include scoring information and options, which allows you to modify the scoring for a question and configure options for scored questions for an entire Prescreen Questions section on the workflow. In addition, the user interface (UI) for the Add Questions pop-up is updated to match current styles, and scoring options are added to the Screening Options pop-up.

The application workflow is configured in the following areas of the Recruiting module:

- Application Workflow Templates
- Default Requisition Templates
- Job Requisitions
- Requisition Templates

To access the Application Workflow Templates page, go to **Admin > Configuration Tools > Recruit**. Then, click the **Applicant Workflow Templates** link in the Applicant Tracking section.

To access Default Requisition Templates, go to **Admin > Configuration Tools > Recruit**. Then, click the **Default Requisition Templates** link in the Applicant Tracking section.

To manage job requisitions, go to **Recruit > Manage Requisition**.

To access the Requisition Templates, go to **Admin > Configuration Tools > Recruit**. Then, click the **Requisition Templates** link in the Applicant Tracking section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Application Workflow Template - Manage	Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User’s OU. This is an administrator permission.	Recruiting Administration
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.	Recruiting Administration
Requisition:	Grants ability to access and manage all requisitions	Recruiting

Manage	regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when*	Recruiting

	creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	
Requisition Template – Application Workflow Template - Manage	Grants ability to set and edit Application Workflow Templates when editing Requisition Templates. This permission can be constrained by OU and User’s OU. This is an administrator permission.	Recruiting Administration
Requisition Template - Manage	Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration

Add Questions Pop-Up

The Add Questions pop-up is updated to match current styles. The following information displays in the pop-up:

Filters

The following filters are available for searching for questions and filtering the Questions table:

- Question or Question ID - Enter the question name or ID by which to filter the results.
- Response Type - Select a response type from the drop-down.
- Category - Select a pre-screening question category from the drop-down.
- Language - Select a question language from the drop-down.

Once all desired filters are configured, click **SEARCH**. This updates the table with questions that match the filter criteria.

Add All Questions

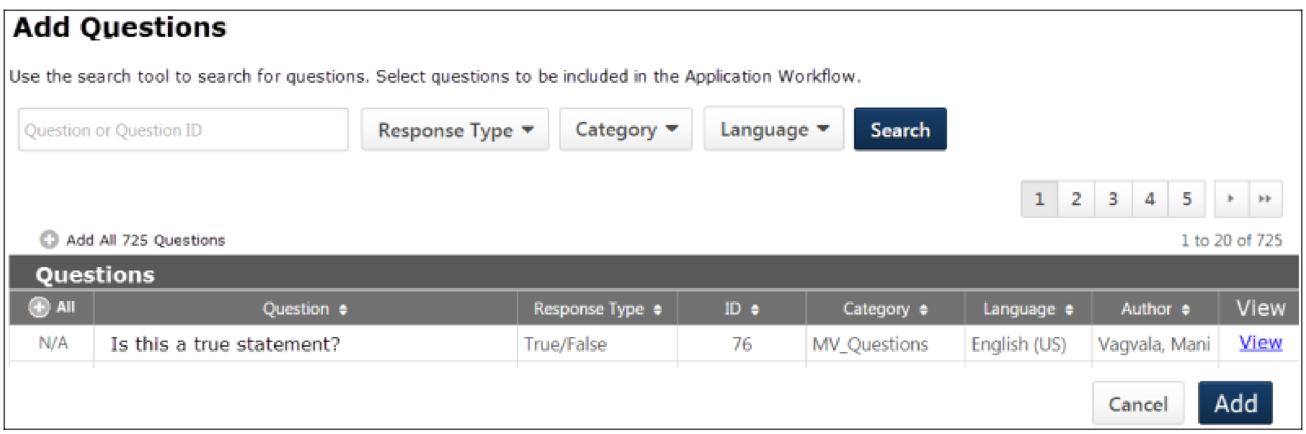
Click the **Add All** option to add all the pre-screening questions that are available to the Prescreen Question action item.

Questions Table

The following columns display in the table:

- All - This column displays an Add icon. Click the icon to add the question. This enables the Selected Questions section to display above the list of questions and adds the question to the Selected Questions section. Once a question is added, the column displays "N/A" for the question.
- Question - This column displays the question.
- Response Type - This column displays the response type configured for the question.
- ID - This column displays ID for the question.
- Category - This column displays the category defined for the question.
- Language - This column displays language for the question.
- Author - This column displays user who created the question.
- View - This column displays a **View** link to view the question. Prior to this enhancement, the column displayed a View icon. When viewing questions, the UI for the preview window is updated to match current styles.

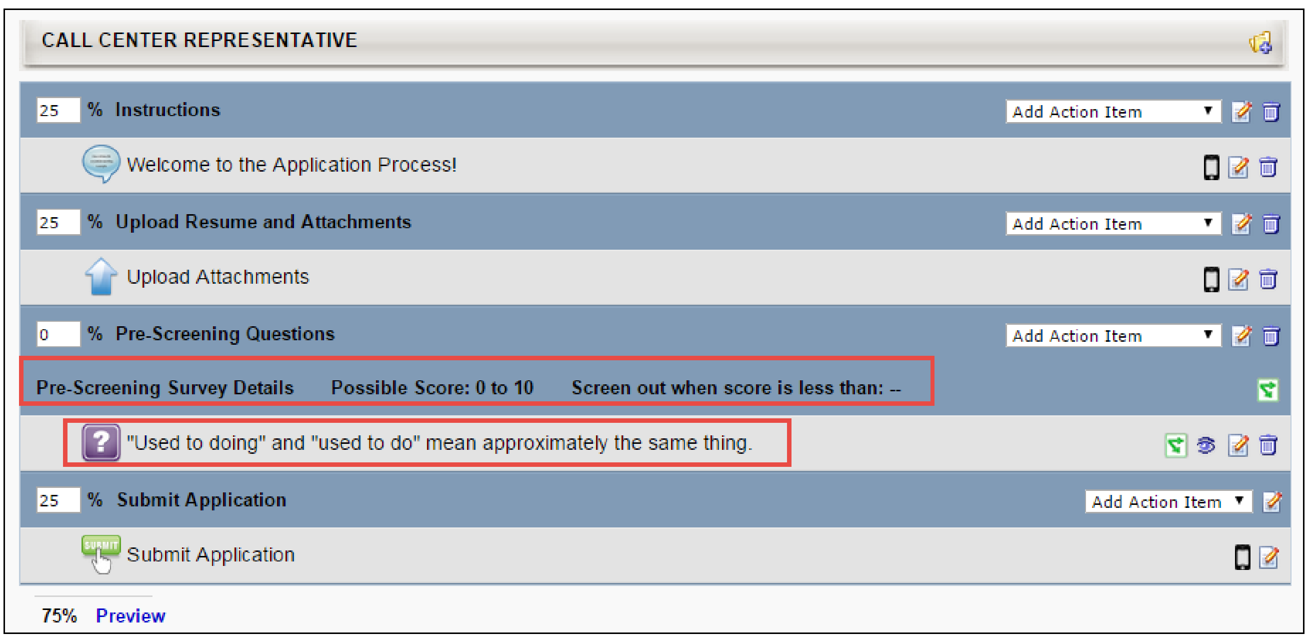
Once all desired questions are selected, click **ADD**. This creates the Prescreen Question action item and adds the questions to the section.



Pre-Screening Survey Details

When a Prescreen Question action item is added to the workflow, a Pre-Screening Survey Details bar now displays for the section. The following information displays in the bar:

- Possible Score - This field helps administrators see the total possible score that an applicant can receive for all of the scored questions that are included in the section. The score displays as [Minimum Score Value (the response option with the smallest score value)] to [Maximum Score Value (the sum of the response option(s) that are marked as correct)]. The value is updated automatically when changes are made to the response option scores on the Screening Options pop-up.
- Screen out when score is less than - This field displays the screen out score that removes an applicant from the application process if the applicant receives a score that is less than the screen out number. The number is defined on the Survey Options pop-up. The value changes dynamically when questions are added or removed from the section.
- Survey Options - Click the Survey Options icon in the Pre-Screening Survey Details header to open the Survey Options pop-up. *See below for more details about this feature.* When the icon is green, this indicates that the screen out option is inactive ("No" is selected in the **Screen Out** field in the Survey Options pop-up). When the icon is red, this indicates that the screen out option is active ("Yes" is selected in the **Screen Out** field in the Survey Options pop-up). By default, the icon is green and the screen out option is inactive.

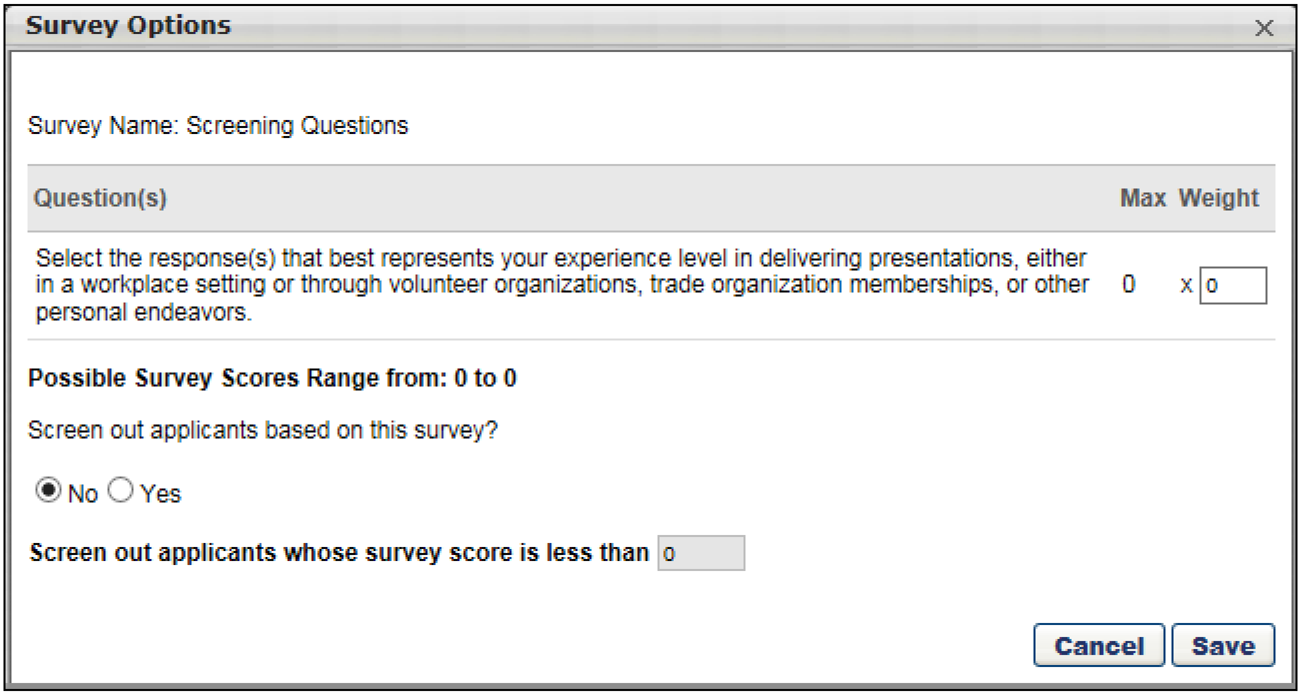


Note: *A "survey" is considered to be the group of questions in a Prescreen Question action item section.*

Note: *The Pre-Screening Survey Details bar does not display for Prescreen Question action items that only include Free Form (Essay) questions.*

Survey Options Pop-Up

In the Survey Options pop-up, configure the weight and screen out settings that will apply to all of the questions in the Prescreen Question section.



Questions Table

The following columns display in the table:

- Question(s) - This column displays the pre-screening question.
- Max - This column displays the maximum score for the question.
- Weight - You can define the weight for a question to customize its importance in that particular application workflow. Weights act as multipliers against response option scores. Enter a value from 0-100. This is a required field.

Best Practice: *When using question and survey scoring, it is a best practice to first configure scores for response options within the question(s), and then configure question weights within the survey(s).*

Possible Survey Scores Range

The values in this field are automatically calculated based on the minimum and maximum possible scores for questions in the survey. The minimum score is the single lowest response option. The maximum score for True/False, Yes/No, and Multiple Choice Single Answer question types is the correct response option withe highest value. The maximum score for Multiple Choice Multiple Answer question types is the sum of the correct responses.

Screen Out Applicants Based on This Survey

By default, **No** is selected, which indicates that applicants are not screened out based on their responses to the questions in the survey. The survey score option is grayed out and not selectable.

Select **Yes** to screen out applicants based on their responses to the questions in the survey. This enables the survey score field. Applicants will not be able to continue with the application if they score less than the value in the survey score field.

Screen Out Applicants Whose Survey

Based on the value in this field, any applicant who scores below the indicated threshold will be screened out based on their survey score, regardless of whether they answered individual pre-screening questions correctly or incorrectly. The value in the survey score field must be less than the maximum score for the survey. This option is required if **Yes** is selected in the enable screen out field above.

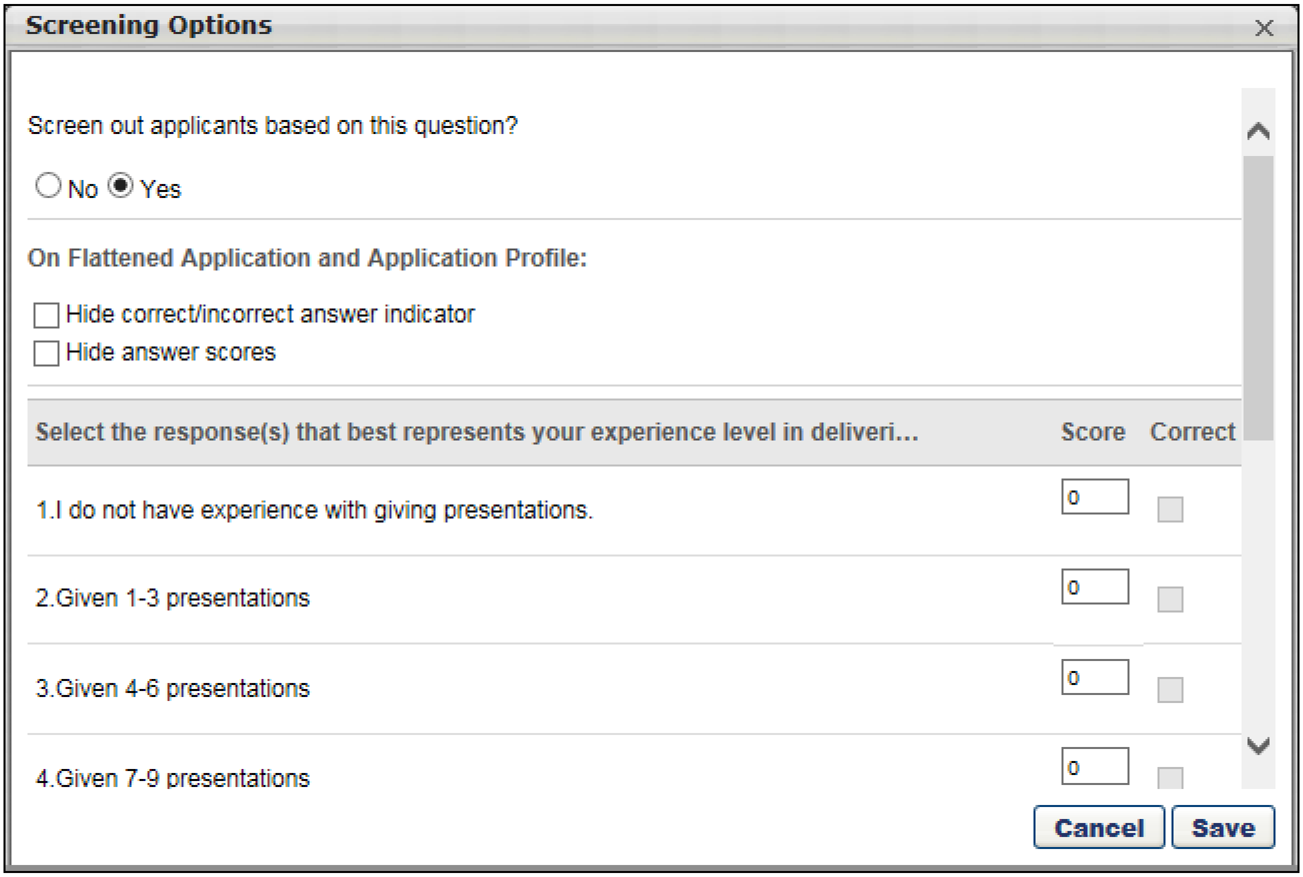
Screening Options Pop-Up

The following changes are made to the Screening Options pop-up to include scoring information for the question:

- Screen out applicants based on this question? - By default, "No" is selected for this option. Prior to this enhancement, "Yes" was selected by default.
- Hide correct/incorrect answer indicator - The name of this question is modified, but there are no functionality changes to the question.
- Hide answer scores - This is a new option that is added as part of the pre-screening question scoring functionality. This option is unchecked by default. Check the box to prevent recruiters and hiring managers from viewing the score for a question. When unchecked, the score is visible to recruiters and hiring managers when viewing the application.
- Scoring Section - A scoring section is added to display the pre-screening question and enable the administrator to view/modify the score. To change the score for a response, enter a different whole number from 0-100 in the Score column for the response. The option in the Correct Response column cannot be modified.

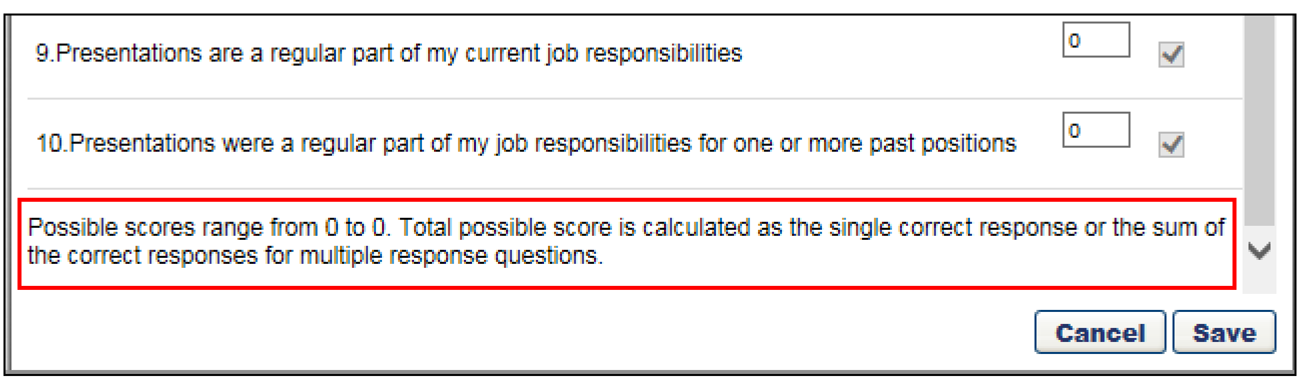
  Note: *When editing a job requisition that has been submitted, the Score column cannot be modified.*

  Best Practice: *As a best practice, when configuring scores for Multiple Choice/Multiple Response questions, set the responses that are incorrect to 0.*



Possible Score Range

The possible score range displays below the question. The range displays the range from the minimum score value to the maximum score value. For True/False, Yes/No, and Multiple Choice Single Answer question types, the total possible score value is defined as the single correct response score value. For Multiple Choice Multiple Answer question types, the total possible score value is calculated as the sum of the correct score responses. The values update automatically based on the changes you make to the Score column.



Preview

When previewing the application workflow, scoring information does not display. The response that is identified as the correct response is not indicated in the preview.

Copy Application Workflow

When copying an application workflow as part of an application workflow template, requisition template, default requisition template, or job requisition, any scoring and weight settings that are configured for Prescreen Question action items are copied.

Clone External Applicant Workflow

When the Clone External Applicant Workflow option is selected on the Internal Applicant tab for the application workflow for requisition templates and job requisitions, any scoring and weight settings that are configured for Prescreen Question action items are cloned.

Manage Applicants - Edit Page Layout

With this enhancement, the Pre-Screening Survey column can be added to the Manage Applicants page from the Edit Page Layout page. The name of the column is defined by the administrator when configuring the application workflow for the job requisition.

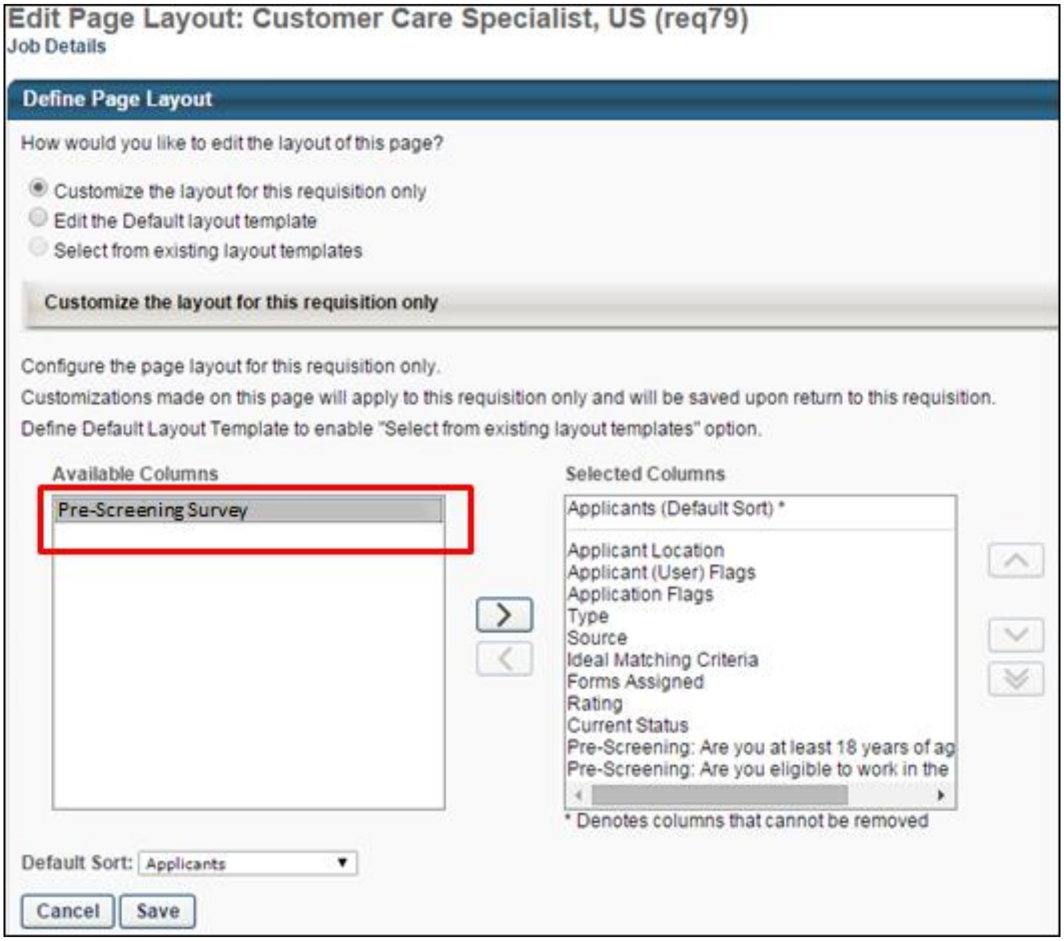
As with existing functionality, to add the column, select the column in the Available Columns section, and then click the **MOVE RIGHT** button to move the column to the Selected Columns section. Click **SAVE** to save the changes to the layout. *See Manage Applicants - Edit Page Layout for additional information about configuring the Manage Applicants page columns.*

To access the Edit Page Layout feature, click the Edit Page Layout option in the upper-right corner of the **Manage Applicants** page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage*	Recruiting

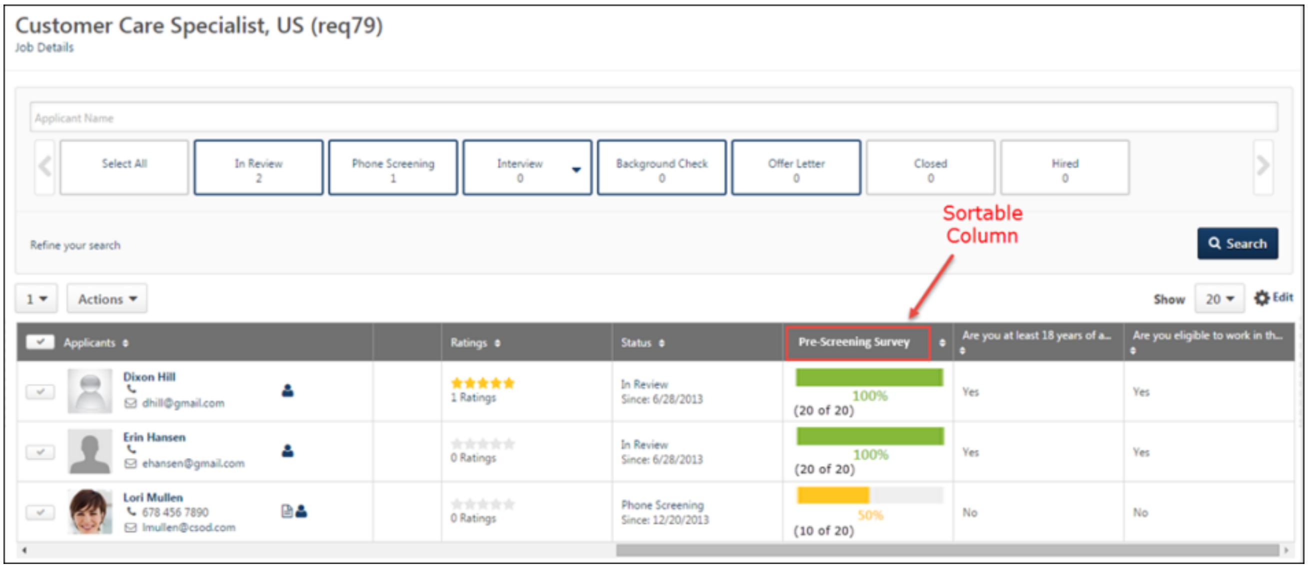
	requisitions, only certain fields are editable when editing a requisition.	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting


Edit Page Layout: Customer Care Specialist, US (req79)
Job Details
Define Page Layout
How would you like to edit the layout of this page?
Customize the layout for this requisition only
Edit the Default layout template
Select from existing layout templates
Customize the layout for this requisition only
Configure the page layout for this requisition only.
Customizations made on this page will apply to this requisition only and will be saved upon return to this requisition.
Define Default Layout Template to enable "Select from existing layout templates" option.
Available Columns
Pre-Screening Survey
Selected Columns
Applicants (Default Sort) *
Applicant Location
Applicant (User) Flags
Application Flags
Type
Source
Ideal Matching Criteria
Forms Assigned
Rating
Current Status
Pre-Screening: Are you at least 18 years of ag
Pre-Screening: Are you eligible to work in the
* Denotes columns that cannot be removed
Default Sort: Applicants
Cancel
Save

Manage Applicants - Pre-Screening Survey Column

With this enhancement, recruiters can add the Pre-Screening Survey columns to the Manage Applicants page from the Edit Page Layout page. The column displays summary information for an applicant's score for a given Pre-Screening Survey section in the application workflow. The column is sorted by default by the highest to lowest total survey score.

The title of the column is defined by the administrator when configuring pre-screening question sections for the application workflow. Each Pre-Screening Survey column represents one pre-screening questions section in the workflow.



Pre-Screening Survey Column

The following information displays in the column:

- Percentage Bar - This displays the percentage in a bar format of the applicant's total survey score divided by the total possible survey score. The following colors display:
  - Red - This indicates that the percentage is 0-24.
  - Yellow - This indicates that the percentage is 25-75.
  - Green - This indicates that the percentage is 76-100.
- Percentage - This displays the applicant's total score for all of the questions in a Pre-Screening Questions section divided by the total possible score for all of the questions.
- Weighted Score - This displays the applicant's weighted score as [applicant's total survey score] out of [total possible survey score].

Scoring & Screened Out Applicants

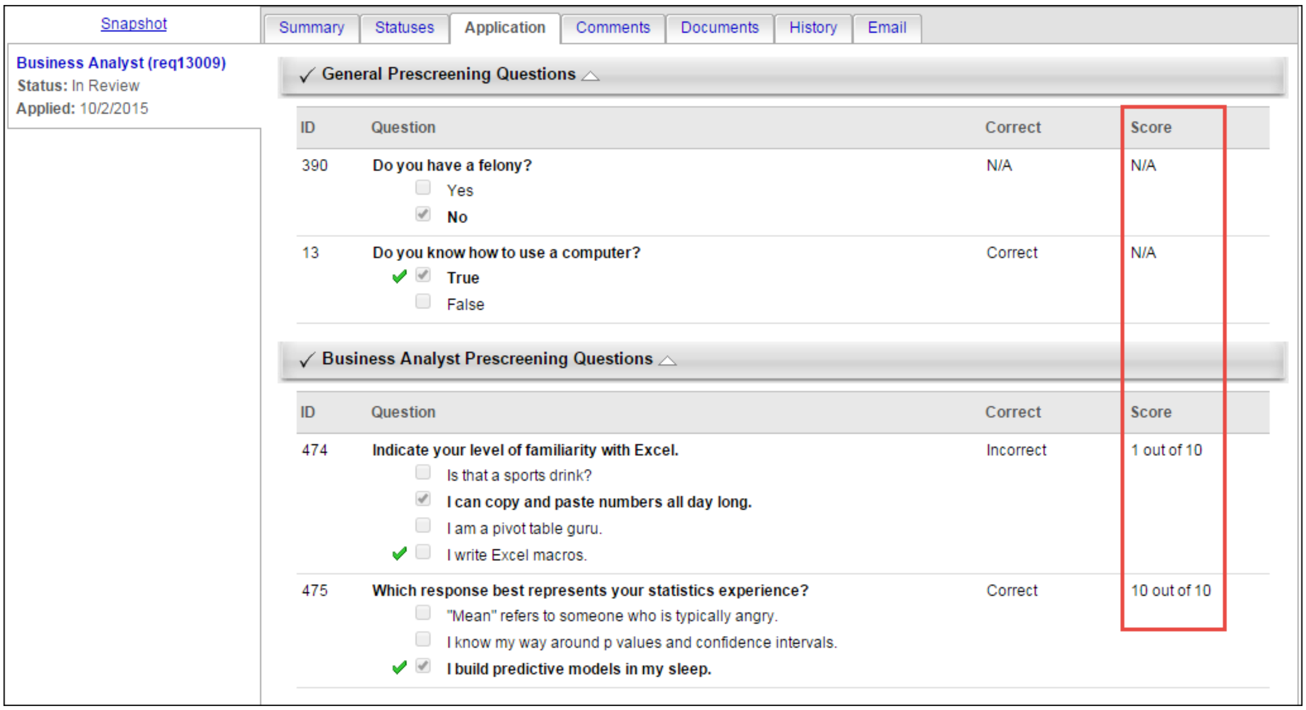
Applicants who were screened out of the application process as a result of the overall score received for a pre-screening questions section do not display on the Manage Applicants page. The applicant's status is automatically changed to Closed.

Applicant Profile - Pre-Screening Question Scoring

With this enhancement, administrators can add a score to pre-screening questions. A Score column is added to the Pre-Screening Questions section(s) of the Application tab on the Applicant Profile page, and the applicant's total score for the pre-screening questions also displays.

Score Column

The column displays the score for each question as "[Applicant's Score] out of [Total Possible Score]." For Free Form (Essay) question types, the column displays "N/A."

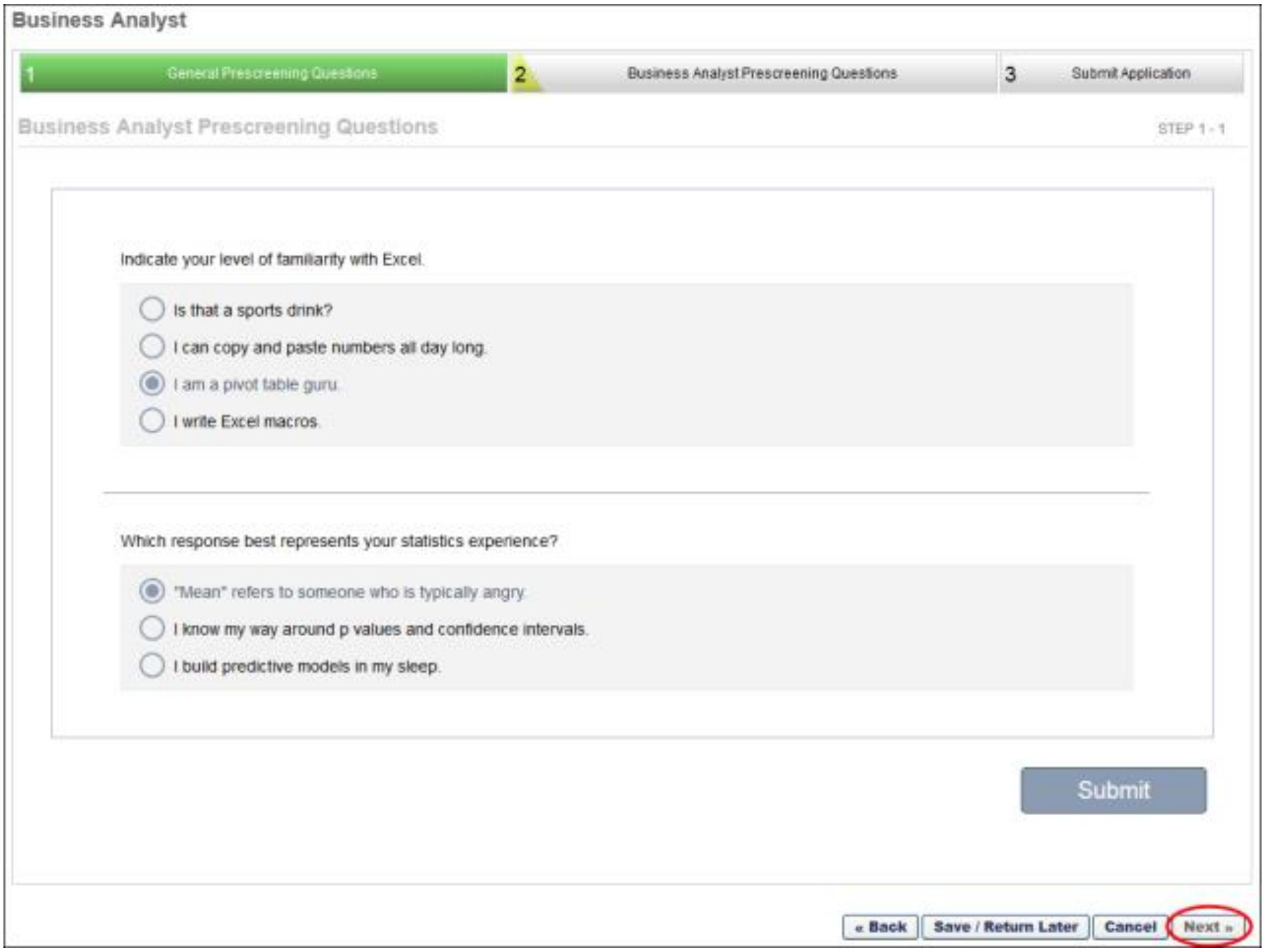


Applicant Experience - Pre-Screening Questions

With this enhancement, updates are made to the applicant experience for Pre-Screening Question sections on the application. These updates apply to internal and external applicants, as well as applicants submitted by a recruiting agency.

- **Image and Media File Attachments** - Administrators can now include an image or media file as part of a pre-screening question. Applicants can view the image or play the media file when responding to the pre-screening question. The following file types can be attached:
  - .bmp
  - .flv
  - .gif
  - .jpg
  - .mp4
  - .png
  - .wmv - **Note:** *This file type is not compatible with Chrome and Firefox.*
- **Submit Button** - A **SUBMIT** button is added to each page of a Pre-Screening Question section. The applicant must click **SUBMIT** within the Pre-Screening Question section in order to move to the next step in the application workflow. The **NEXT** button will be grayed out and not selectable. **Note:** *The applicant can still click Save and Return Later to complete the application at a later time.*
- **Back Button** - Applicants can click **BACK** to return to the previous page in the Pre-Screening Questions section, which allows the applicant to change the answers to questions on previous pages. When using the **BACK** button, the **SUBMIT** button changes to **RESUBMIT** so that applicants can submit their updated responses.

  Note: *Upon implementation of this enhancement, if an applicant has started an application that includes pre-screening questions but has not yet submitted the application and they click the* **BACK** *button within the Pre-Screening Questions step, their in-progress work on the Pre-Screening Questions section of the application will be lost. The applicant will not be notified that they need to restart the Pre-Screening Questions section on the application.*


Business Analyst
1
General Prescreening Questions
2
Business Analyst Prescreening Questions
3
Submit Application
Business Analyst Prescreening Questions
STEP 1 - 1
Indicate your level of familiarity with Excel.
Is that a sports drink?
I can copy and paste numbers all day long.
I am a pivot table guru.
I write Excel macros.
Which response best represents your statistics experience?
"Mean" refers to someone who is typically angry.
I know my way around p values and confidence intervals.
I build predictive models in my sleep.
Submit
« Back
Save / Return Later
Cancel
Next »

Career Site - View Application

When applicants view their application from the career site by clicking the **VIEW APPLICATION** option in the Application Status section, their score for pre-screening questions does not display.

Application PDF

With this enhancement, administrators can add a score to pre-screening questions. To display the score on the PDF application (flattened application), the following fields are added to the PDF:

- **Total Applicant Score** - This field displays the total score as "[Sum of Applicant's Correct Scores for Each Question]/[Each Question's Total Correct Score]."
- **Question Score** - This field displays the applicant's score for the question as "[Applicant's Score] out of [Total Possible Score]." For Free Form (Essay) question types, the score displays "N/A."

Note: *The score does not display if the Hide answer scores field is checked on the **Screening Options pop-up** for the question.*

Total Applicant Score: 20/20

Indicate your level of familiarity with Excel.

Response

- I write Excel macros.

Result
[Correct]
[Question Score: 10/10]

Which response best represents your statistics experience?

Response

- I build predictive models in my sleep.

Result
[Correct]
[Question Score: 10/10]

Recruiting Usability Enhancements

Recruiting Usability Enhancements Overview

With this enhancement, the following usability improvements are made throughout the Applicant Tracking System:

- Manage Applicants Status Filter behavior updated
- Submission Date column added to Manage Applicants page
- Status Change Date column added to Manage Applicants page
- Disposition Reason visibility added to various areas
- Resume/CV Review Page - download PDF of application
- PDF of application to display manually entered resume data
- Improve formatting when pasting from word to **Description** and **Qualifications** fields

Prior to these enhancements, it was difficult to filter the status on the Manage Applicants page and important columns were missing in the applicants table. In addition, the disposition reason was not displayed everywhere that the Closed status displayed. The flattened application document (PDF version of the application) could not be downloaded from the Resume Review page and did not include manually entered resume details. Finally, formatting was not maintained when pasting text into the Job Description and Ideal Qualifications fields when configuring job requisitions.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This	Recruiting

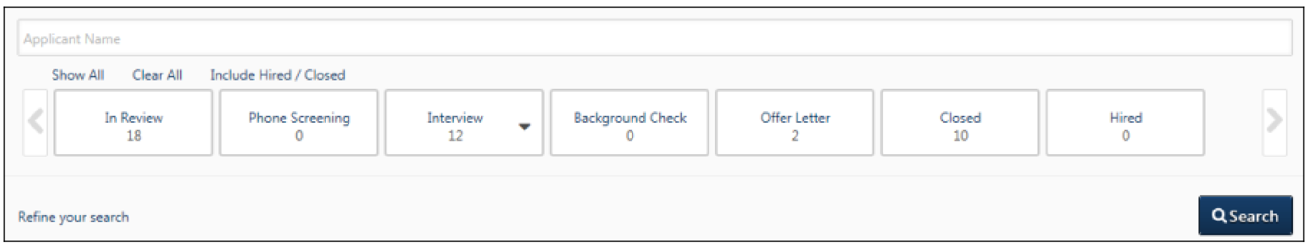
	permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting

Manage Applicants - Status Filter

With this enhancement, default status selections are no longer selected for the status filter carousel on the Manage Applicants page. Instead, the page displays all applicants in any status type except Hired or Closed. Recruiters can filter the statuses by selecting one or more filters in the carousel.

In addition, the following additional filter options are added above the carousel:

- Show All - Click the link to show all applicants in any status type.
- Clear All - Click the link to clear all selections in the status filter carousel. The applicants table updates to show all applicants in any status type.
- Include Hired/Closed - Click the **Include Hired/Closed** link to update the applicants table to include applicants who are in a Hired or Closed status.



Manage Applicants - Submission Date

With this enhancement, a Submission Date column can be added to the Manage Applicants page. The column displays the date on which the applicant submitted their application. This can help recruiters more quickly find the applicants that they have just reviewed on the New Submissions page. This also helps recruiters identify applicants who should have further action taken.

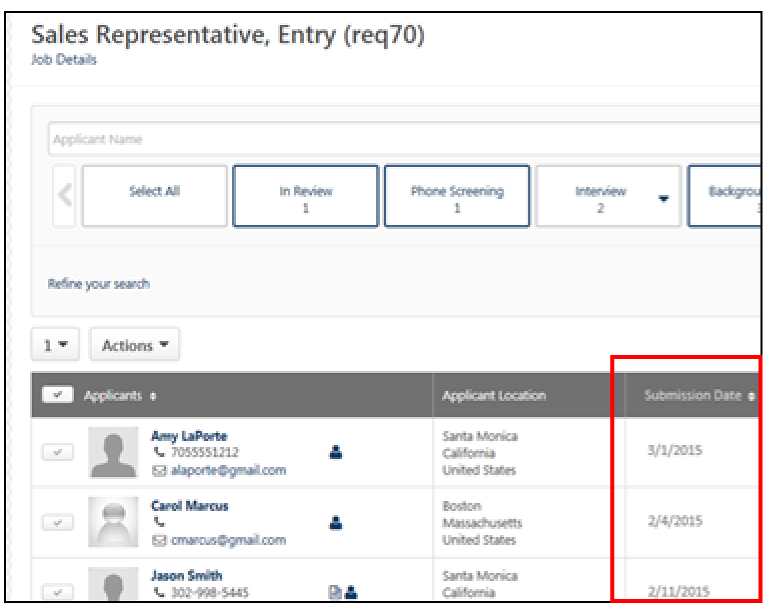
The column can be added from the Edit Page Layout page. The column is sortable by most to least recent submission date.

To access the Manage Applicants page, go to **Recruit > Manage Requisition**. On the Manage Job Requisitions page, locate the requisition for which you would like to manage candidates. From there, click the linked number of candidates in the Applicants column.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** permission overrule those of the **Requisition: Owner** permission. For requisition owners that do not also have permission to manage*	Recruiting

	requisitions, only certain fields are editable when editing a requisition.	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting



Manage Applicants - Status Change Date Column

With this enhancement, a Status Change Date column can be added to the Manage Applicants page. The column displays the date on which the applicant's status was most recently changed. This can help recruiters find the applicants who have applied the most recently, as well as identify applicants who should have further action taken.

The column can be added from the Edit Page Layout page. The column is sortable by most to least recent status change.

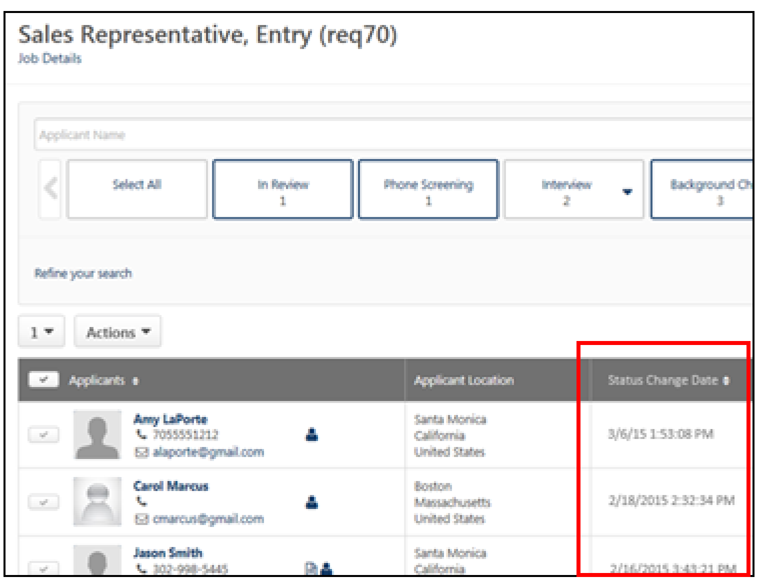
To access the Manage Applicants page, go to **Recruit > Manage Requisition**. On the Manage Job Requisitions page, locate the requisition for which you would like to manage candidates. From there, click the linked number of candidates in the Applicants column.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage*	Recruiting

	requisitions, only certain fields are editable when editing a requisition.	

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting

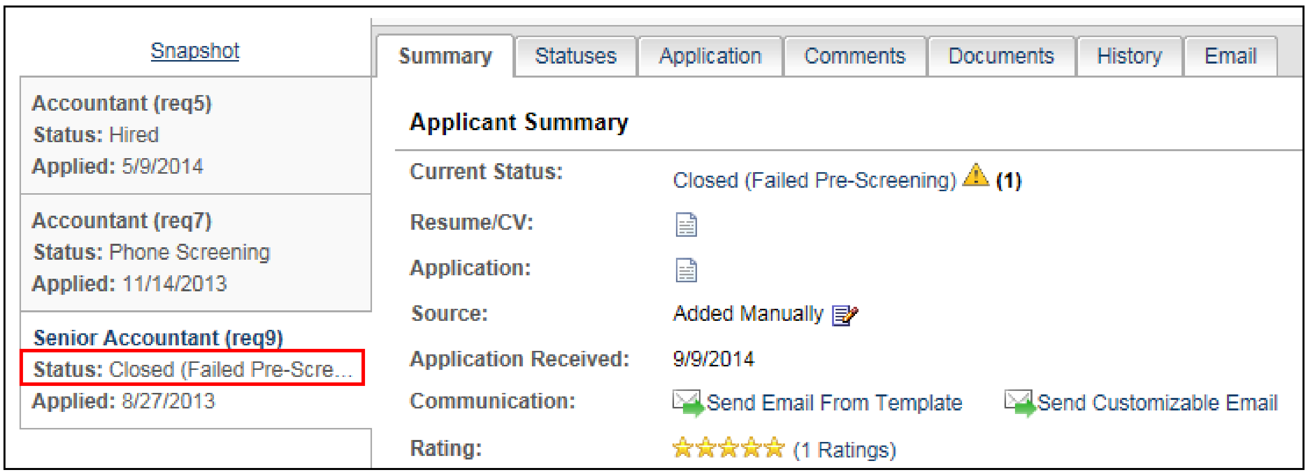


View Disposition Reason

With this enhancement, the disposition reason now displays in parentheses to the right of the Closed status in multiple areas of the Applicant Tracking System (ATS). This helps recruiters quickly identify the reason an applicant's status was changed to Closed. Prior to this enhancement, the disposition reason only displayed in the Current Status field in the Applicant Summary section of the Summary tab on the Applicant Profile page.

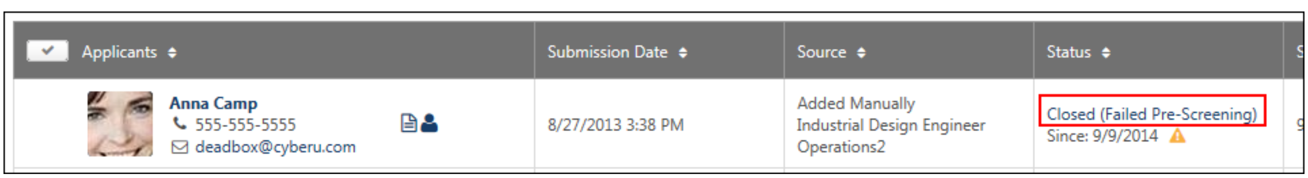
Applicant Profile

The disposition reason displays to the right of the Closed status on the side panel list of other jobs.



Manage Applicants

The disposition reason displays to the right of the Closed status in the Status column.



Requisition Snapshot

The disposition reason displays to the right of the Closed status in the Status column.

Resume/CV Review Page - View PDF Application

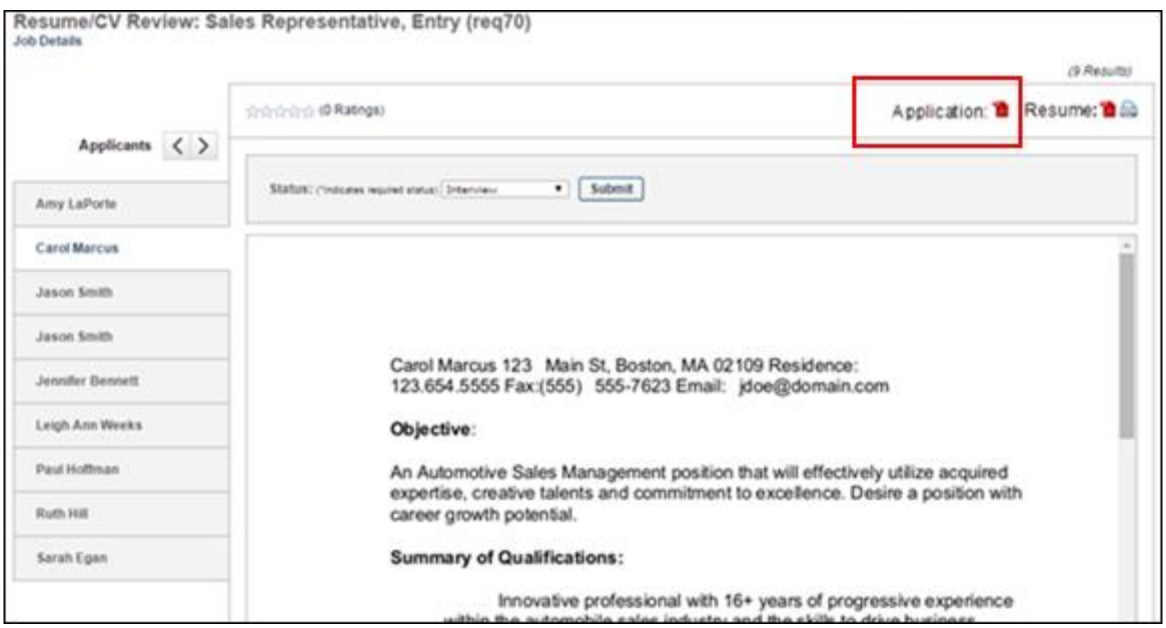
With this enhancement, a Download Application option is added to the Resume/CV Review Page. Clicking the download option opens the PDF version of the application. The option is available when accessing the page via New Submissions or Manage Applicants.

To access the Resume/CV Review page from the New Submissions page, click the Resume/CV Review option in the far right column of the New Submissions table. To access the Resume/CV Review page from the Manage Applicants page, select the *Resume/CV Review* option from the Actions drop-down.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting



Include Resume Data on PDF Application

With this enhancement, an option is added to General Preferences to enable administrators to display manually entered resume data on the PDF version of the application. Previously, when applicants manually entered data into resume fields on the application, the data was not visible when viewing the PDF application.

Permissions

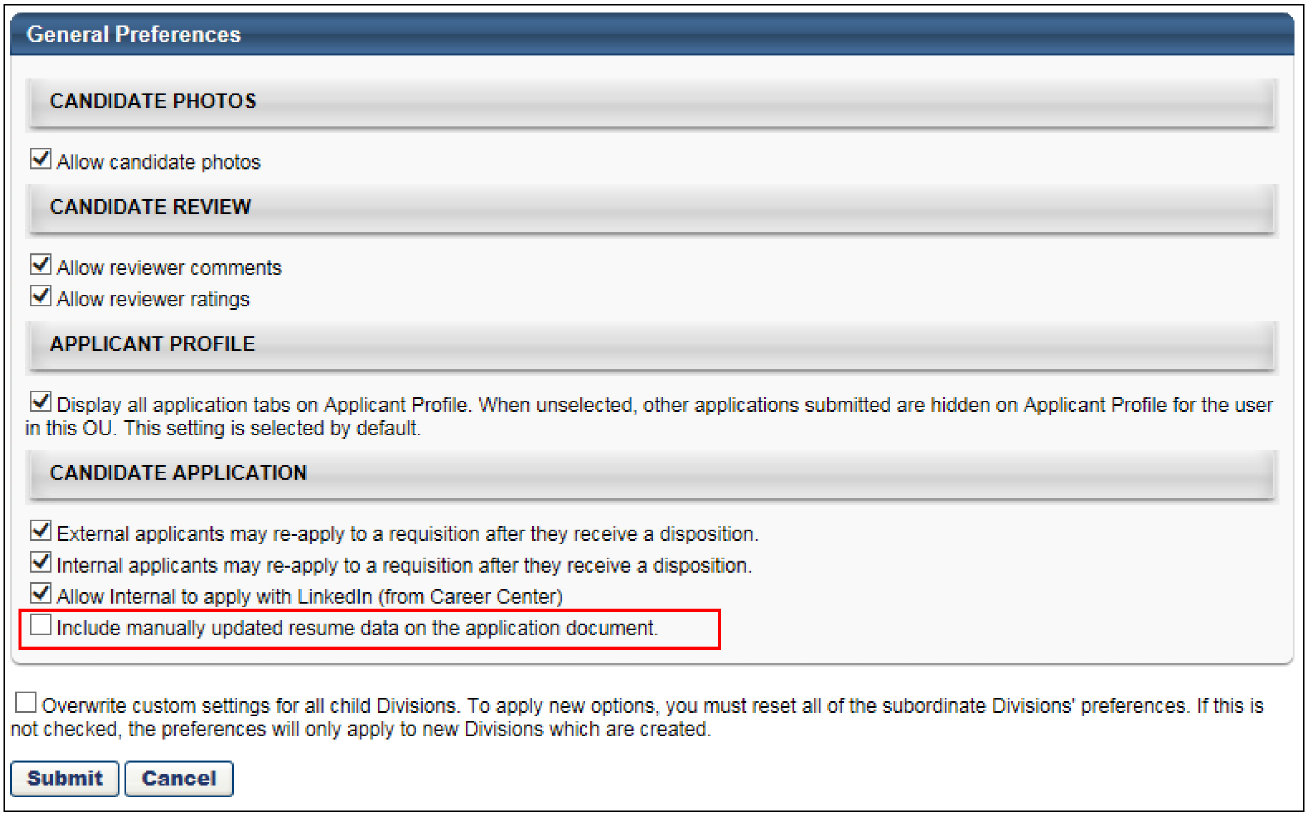
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Recruiting General Preferences - Manage	Grants ability to access and manage Recruitment General Preferences.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting

General Preferences

The following new option is added to the Candidate Application section:

- **Include manually updated resume data on the application document** - Select this option to display manually entered resume data on the PDF version of the application. This option is unchecked by default.



Viewing PDF Application

When viewing the PDF version of the application, if the **Include manually updated resume data on the application document** option is checked in General Preferences, then the applicant's manually-entered resume data displays on the PDF version of the application. The data appears on the last page of the PDF in a new section called Structured Resume. Use Case:[3]

Note: *The manually entered resume data is added to the PDF application at the time the applicant submits their application. If the applicant modifies their resume data after submitting the application, the PDF application is not updated to reflect the changes.*

[3] An applicant chooses to manually enter their resume data on the application, providing such information as prior employment experience and educational background. Prior to this enhancement, none of the manually entered data appeared on the PDF application. With this enhancement, the data displays in the Structured Resume section on the last page of the PDF.

Structured Resume

Prior Experience

Position	Company	Details	Start Date
New MISC Position	New MISC company	test	N/A

Education

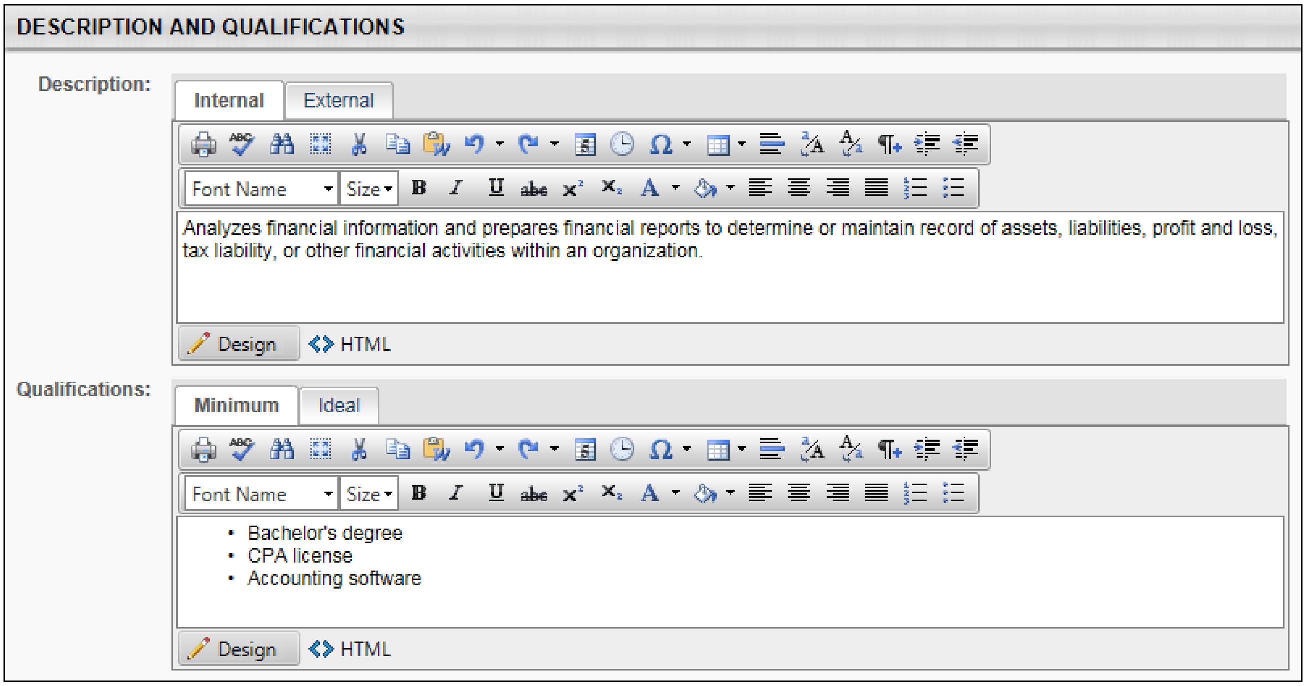
Major	Minor	Institution	Degree in Progress	Graduation Date
FLATTENED APP 1	FLATTENED APP 1	FLATTEEND APP 1	False	N/A
		American Career College	N/A	N/A

MIscguy One
[MISC] Flattened App Resume (req11)

Page 2 of 2

Paste from Word & Formatting Options

With this enhancement, a Paste from Word option is added to the **Description** and **Qualifications** fields in the Description and Qualifications section when configuring job requisitions and templates. In addition, more text formatting options are added to the fields.



Remove LinkedIn from Search My Network

Remove LinkedIn from Search My Network Overview

With this enhancement, internal users will no longer be able to search their LinkedIn network for potential matches and refer them for open job requisitions. Referral Preferences and the Refer Jobs page in Career Center are updated to remove the option. In addition, the LinkedIn applicant details on the Resume/CV Review page are updated, and the applicant's photo no longer displays.

This enhancement applies to portals that use the Referral Suite functionality in Recruiting and also allow applicants to apply with LinkedIn.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Center - View	Enables users to view the Career Center, including Resume, Career Preferences, Career Pathing and Job Search, depending on enabled components and preferences. This permission also enables users to view the Internal Job Search widget on the Welcome Page and custom pages. This is an end user permission.	Talent/Succession
Referral Preferences - Manage	Grants ability to access and manage Referral Preferences. In addition, this permission enables administrators to view and access the Referrals widget in Welcome Page Preferences and Manage Custom Pages.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this	Recruiting

	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: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting

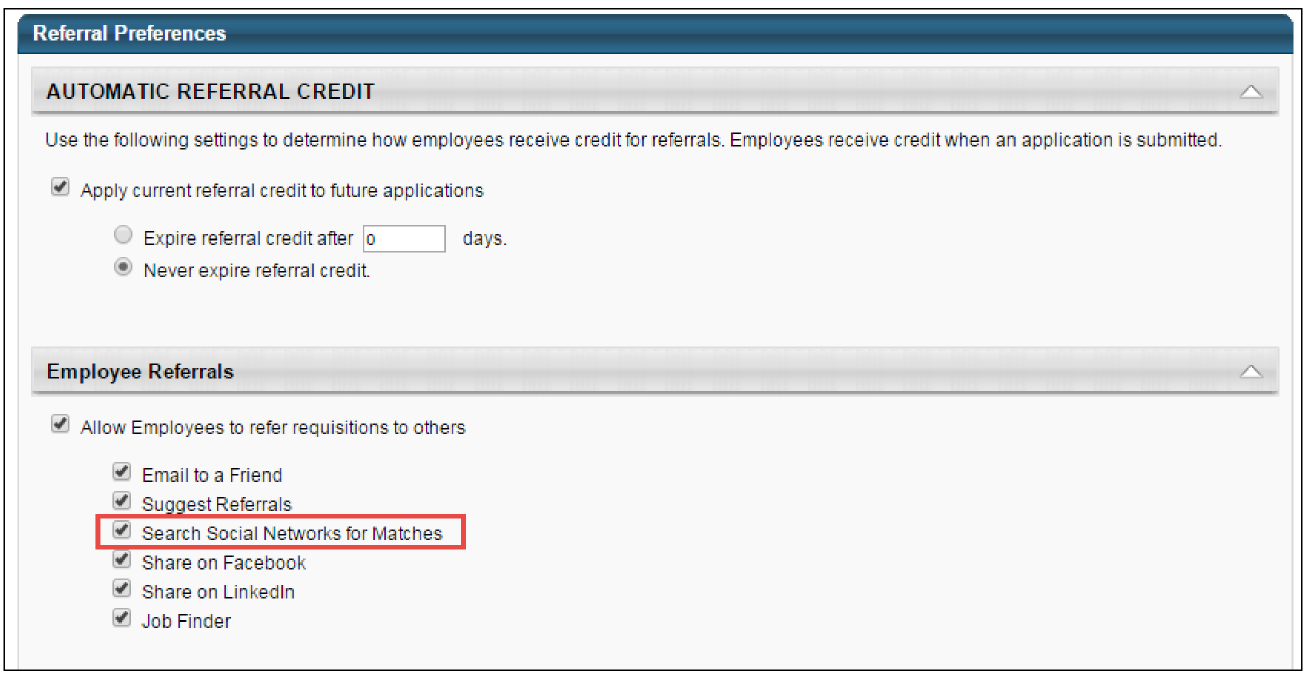
Referral Preferences

With this enhancement, the **Search Social Networks for Matches** option is removed from the Employee Referrals section on the Referral Preferences page. Removal of this option also removes the **Search My Networks for Matches** option from the Refer Jobs page in Career Center. Users will no longer be able to search their LinkedIn network for potential matches to an open job requisition.

To access Referral Preferences, go to **Admin > Tools > Recruit > Referrals**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Referral Preferences - Manage	Grants ability to access and manage Referral Preferences. In addition, this permission enables administrators to view and access the Referrals widget in Welcome Page Preferences and Manage Custom Pages.	Recruiting Administration



Resume/CV Review Page

With this enhancement, for applicants who apply with LinkedIn, the widget that displays the applicant's details is updated to remove the applicant's photo. The user interface (UI) for the widget is also updated.

To access the Resume/CV Review page from the New Submissions page, click the Resume/CV Review option in the far right column of the New Submissions table. To access the Resume/CV Review page from the Manage Applicants page, select the *Resume/CV Review* option from the Actions drop-down.

Permissions

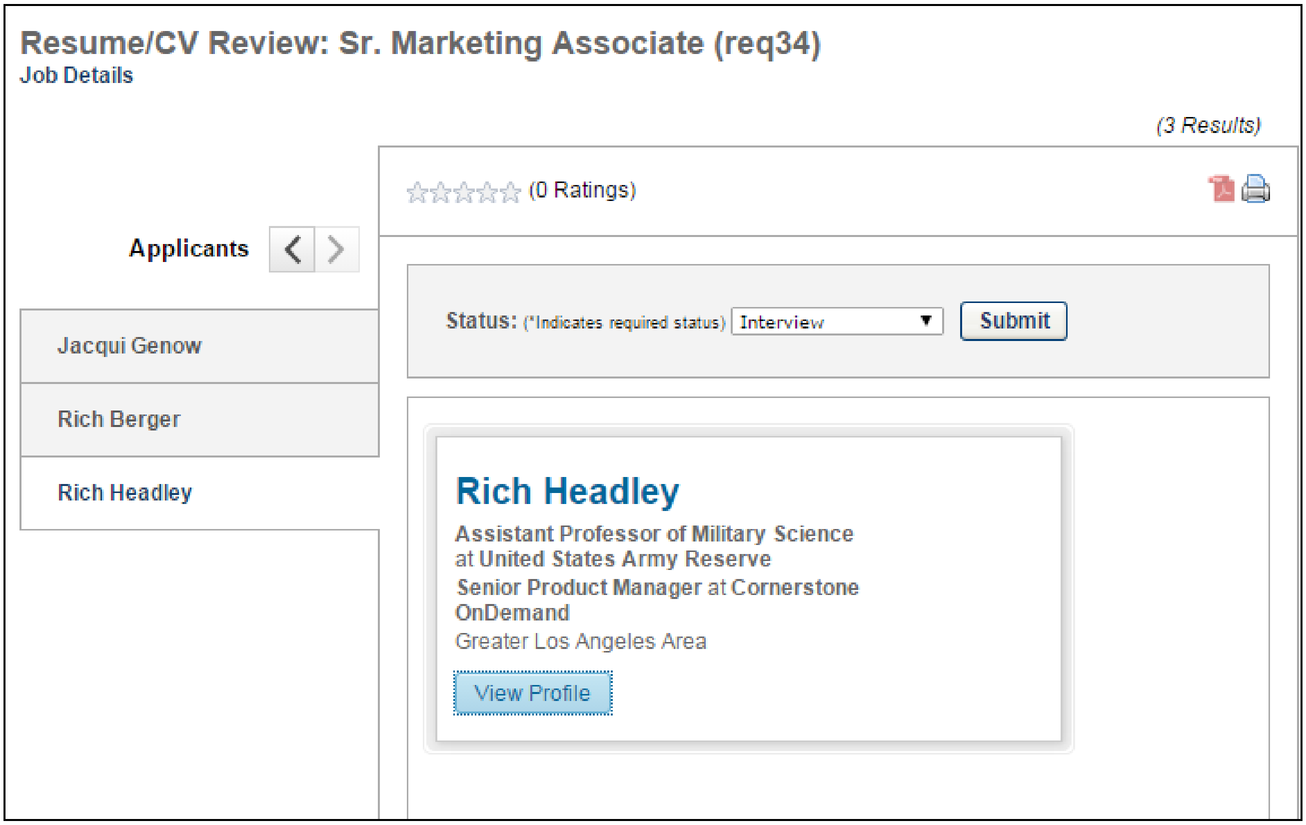
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting

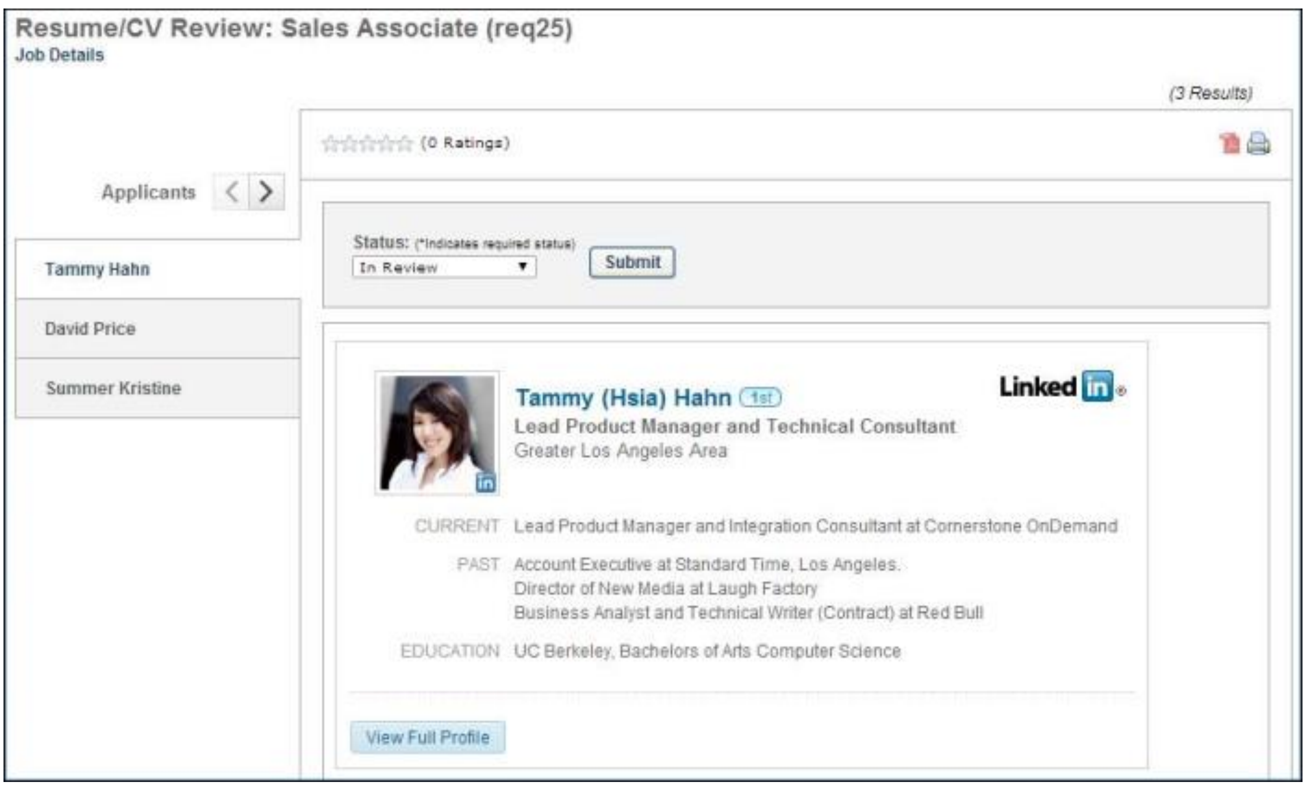
New LinkedIn Widget

The following information displays in the new LinkedIn widget for the applicant:

- Name
- Most Recent Job
- Location
- View Profile button - **Note:** *As with existing functionality, clicking the View Profile button opens the applicant's LinkedIn profile.*



Old LinkedIn Widget



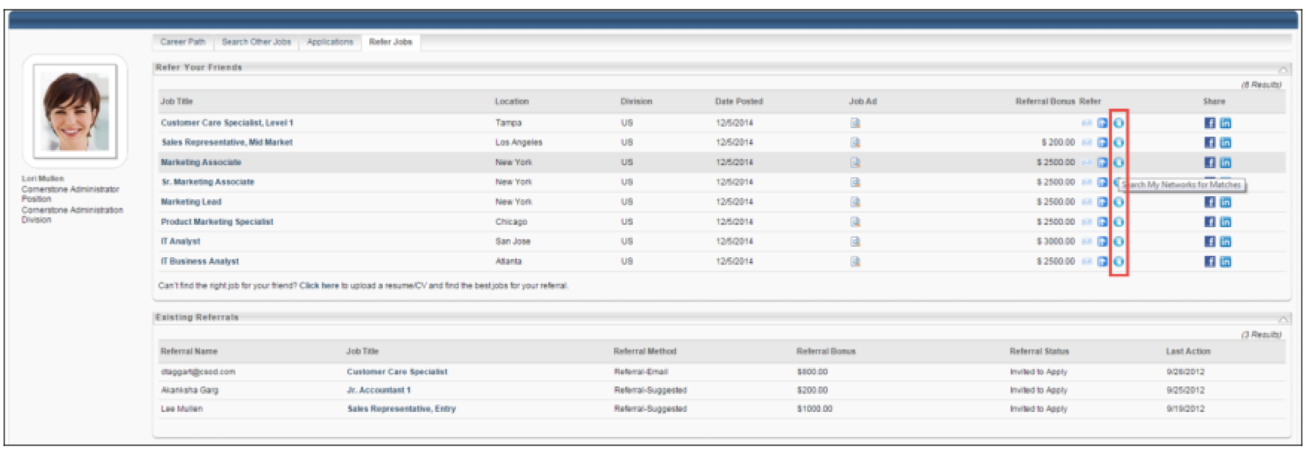
Career Center - Refer Jobs

With this enhancement, the **Search My Networks for Matches** option is removed from the Refer column in the Refer Your Friends panel on the Refer Jobs page in Career Center. Users will no longer be able to search their LinkedIn network for potential matches to an open job requisition.

To access the Refer Jobs tab, go to **Succession > Career Center**.

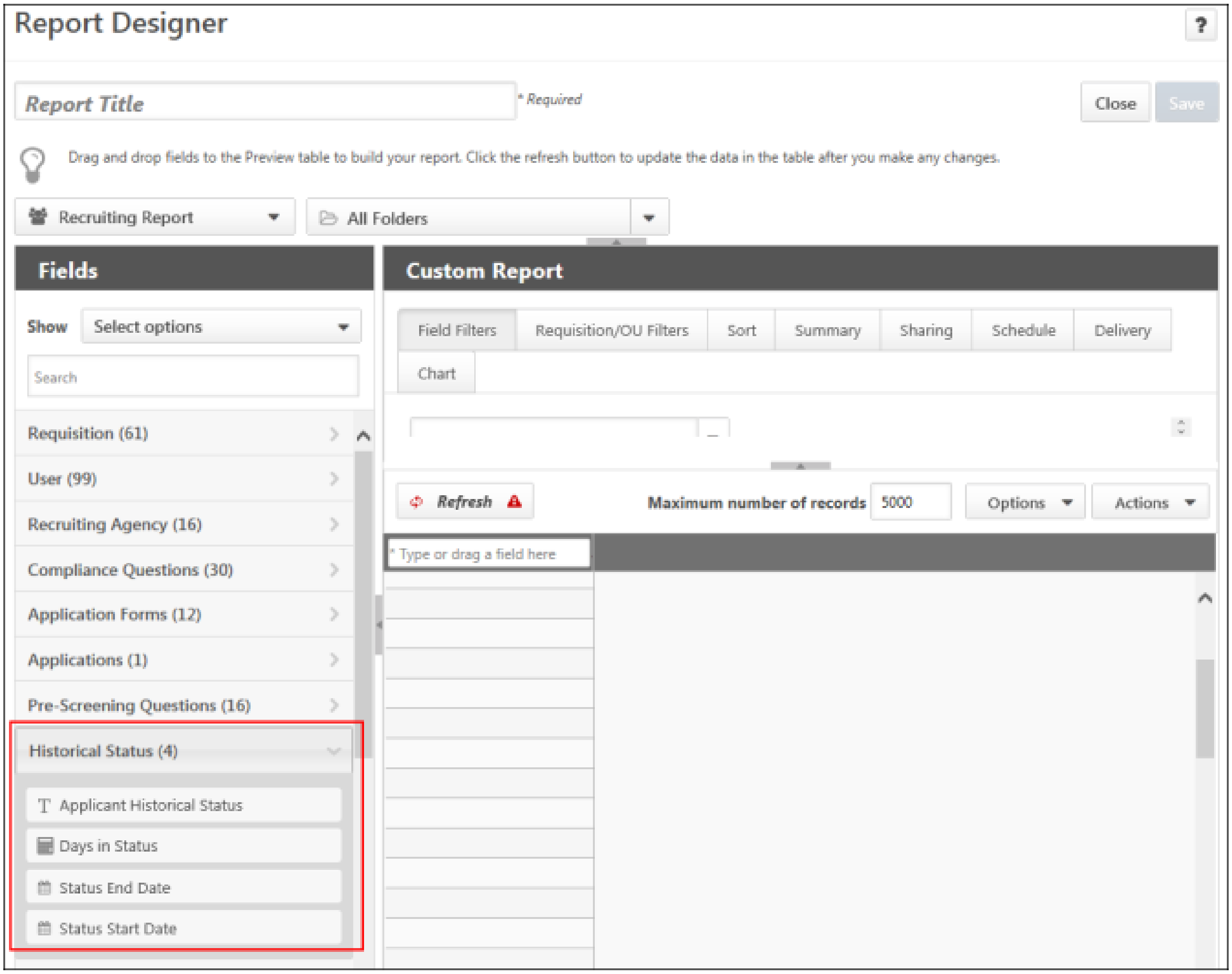
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Center - View	Enables users to view the Career Center, including Resume, Career Preferences, Career Pathing and Job Search, depending on enabled components and preferences. This permission also enables users to view the Internal Job Search widget on the Welcome Page and custom pages. This is an end user permission.	Talent/Succession



Historical Applicant Status Custom Report

With this enhancement, a Historical Status section is added to custom Recruiting reports. This section includes fields that provide historical applicant status data, which helps recruiters understand how long an applicant was in each status and help identify workflow improvements.



Historical Status Section Fields

The following fields are available in the Historical Status section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Applicant Historical Status	Displays all applicant statuses as configured by Division organizational unit (OU).	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Days in Status	Number of days applicant was in the status.	Numeric
Status End Date	Date on which the applicant moved out of the status (i.e., the status change date).	Date
Status Start Date	Date on which the applicant moved into the status. For the first status for the applicant, the system uses the application submission received date. For all other statuses excluding the current status, the start date is the date on which the applicant moved into the status.	Date

Applicant Candidate Status Field

With this enhancement, the **Applicant Candidate Status** field in the User section is renamed **Applicant Current Status**. This helps differentiate this field from the new Applicant Historical Status field.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Recruiting Report - Access Historical Status Section	Grants ability to create and edit Custom Recruiting reports. This permission can be constrained by Division, Position, and Location.	Reports - Analytics

Best Practice: *For portals that use sensitive statuses, it is a best practice to assign the* Custom Recruiting Report - Access Historical Status Section *permission only to users who have rights to access all statuses.*

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Recruiting Report - Create	Grants ability to create and edit Custom Recruiting reports. This permission can be constrained by Division, Position, and Location.	Reports - Analytics
Custom Recruiting Report - View	Grants ability to view results of Custom Recruiting reports created by self or shared by others. This permission can be constrained by Division,	Reports - Analytics

	Position, and Location.	

Pre-Screening Scores in Custom Reports

As part of a separate enhancement for the October '15 release, scoring can be configured for pre-screening questions. With this enhancement, new fields are added to the Pre-Screening Questions section on custom Recruiting reports to enable reporting on pre-screening question scoring.

See **Pre-Screening Talent Score Overview** *on* page 450 *for additional information.*

To create custom Recruiting reports, go to **REPORTS > CUSTOM REPORTS**. Then, click **Recruiting Report** in the **New** drop-down.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Recruiting Report - Create	Grants ability to create and edit Custom Recruiting reports. This permission can be constrained by Division, Position, and Location.	Reports - Analytics
Custom Recruiting Report - View	Grants ability to view results of Custom Recruiting reports created by self or shared by others. This permission can be constrained by Division, Position, and Location.	Reports - Analytics

New/Enhanced Pre-Screening Question Fields

FIELD NAME	DESCRIPTION	TYPE
Screening Section Name	Application workflow section name that contains pre-screening questions.	
Screening Section Score	Sum of all scores from each of the applicant's questions for a particular section.	
Screening Section % Score	Sum of all scores from each of the applicant's questions divided by the sum of all total scores for each question for a particular survey.	
Possible Screening Section Score	Sum of all total scores for each question for a particular survey.	
Section Screen Out Score	Score that determines when an applicant will screen-out of an application at the survey level (via the **Screen out when score is less than** field for the Pre-Screening Survey Details).	

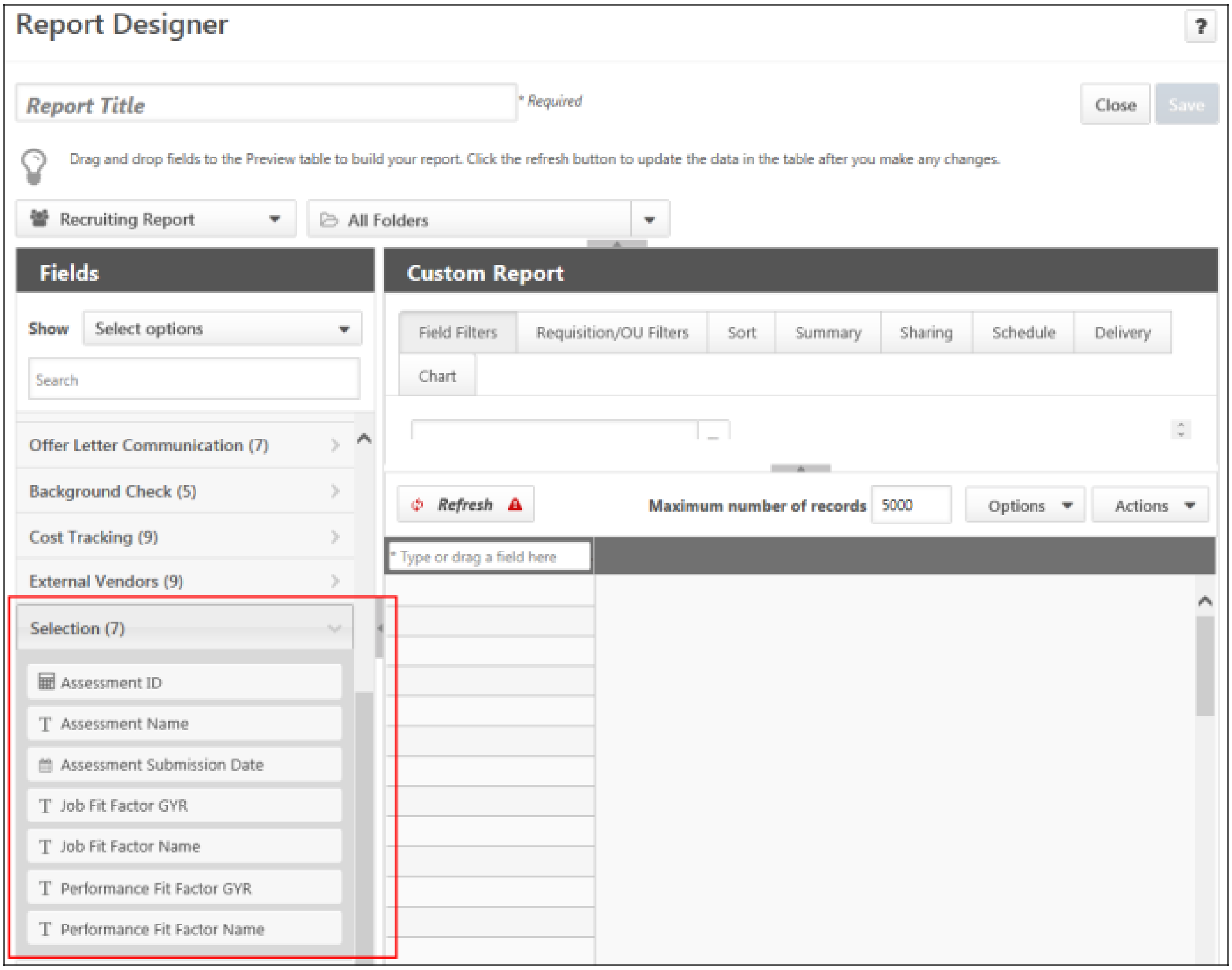
FIELD NAME	DESCRIPTION	TYPE
Applicant Response Score	Applicant's score for the response to an individual question.	
Question Total Score	Total possible score for an individual question.	
User Response	With this enhancement, the field name is changed to "Applicant Response."	Text

Selection in Custom Reports

Organizations with integrated Selection need to get a prioritized mix of candidates for their positions. This typically this translates to roughly 40% Green, 30% Yellow, and 30% Red candidates (GYR) based on the Selection assessment score for a given position. When the percentage of one of the bands is "too high" or "too low," filling new openings with the best candidates can be difficult, and the benefits of prioritization are lost. In addition, organizations would like the ability to combine Selection data with internal datasets.

This enhancement provides the key reporting necessary to understand whether GYR applicant distributions are on target or need adjustment, as well as schedule regular data exports to support independent analyses. For portals with the Selection functionality enabled, this enhancement adds Selection section to custom Recruiting reports to enable reporting on Selection data. The scores and assessment fields that are available for the report are pulled from the **Detailed Results** page.

Upon implementation, this functionality is disabled by default and is only available for portals with both Selection and Recruiting enabled. To enable this functionality, contact Global Product Support. For more information about this functionality, contact your Client Success Manager.



The following fields are available in the Selection section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Assessment ID	The unique ID associated with the assessment.	Numeric
Assessment Name	Name of the assessment.	Text
Assessment Submission Date	Date on which the assessment was completed.	Date
Job Fit Factor GYR	Displays the overall score for the job fit factor as Green, Yellow, or Red. All other values display as “Unscored.”	Text
Job Fit Factor Name	Name of the job fit factor that is being scored.	Text
Performance	Displays the performance factor as Green, Yellow,	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Factor GYR	or Red. All other values display as "Unscored."	
Performance Factor Name	Name of the performance factor that is being scored.	Text

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Selection Custom Reports	Grants the user Custom Reports access to applicant scores from the Cornerstone Selection module for custom Recruiting reports. This permission cannot be constrained.	Recruiting

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Recruiting Report - Create	Grants ability to create and edit Custom Recruiting reports. This permission can be constrained by Division, Position, and Location.	Reports - Analytics
Custom Recruiting Report - View	Grants ability to view results of Custom Recruiting reports created by self or shared by others. This permission can be constrained by Division, Position, and Location.	Reports - Analytics

Succession

SMP Task - View Permission

With this enhancement, a new SMP Task - View permission is now available. This permission grants the ability to view succession tasks. This permission is dynamically assigned to a user when they are assigned any type of SMP task. When the SMP task has ended, this permission is dynamically removed. This permission cannot be constrained.

Implementation

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

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task - View	Grants the ability to view succession tasks. This permission is dynamically assigned to a user when they are assigned any type of SMP task. When the SMP task has ended, this permission is dynamically removed. This permission cannot be constrained.	Talent/Succession

Talent Conferences

Talent Conferences Overview

With this enhancement, a new Talent Conference succession task is now available. This type of succession task allows organizations to schedule and manage talent review conferences, engaging multiple stakeholders within the organization to provide input in employee calibration decisions. Task moderators are able to record any succession rating calibration decisions, generate a summary report, and distribute the results to stakeholders.

Use Cases

1. As part of an organization's succession planning process, line managers complete employee assessments of their direct reports.
2. Within a talent review task, line managers rate direct reports based on Potential, Performance, Impact of Loss, Probability of Loss, etc.
3. When the manager's tasks are complete, the data from those tasks is consolidated for the calibration meeting.
4. The administrator configures a Talent Conference template to include the Performance/Potential and Impact of Loss/Probability of Loss metric grids.
5. The administrator then creates a Talent Conference task by adding the Talent Conference template and configuring moderators.
6. The administrator defines the area of responsibility for the moderator within the task. For example, a HR Partner may be responsible for a location, or a manager may be responsible for a division.
7. When the task is created, the selected moderators are assigned the Talent Conference task.
8. The moderator opens the task and selects reviewers as talent conference participants.
9. The moderator selects which employees will be assessed in the talent conference. The moderator can only select employees from their designated area of responsibility, as configured by the administrator.
10. The moderator schedules the talent conference meeting by selecting a location, date, and time. The moderator then previews the meeting invitation to ensure the participants are available at the selected time.
11. Once the talent conference is scheduled, the moderator calibrates the selected employees and confirms with the meeting participants that the ratings are approved by all participants.
12. The moderator views the Talent Conference Summary to review all results.
13. The moderator signs off on the Talent Conference task.

Implementation

Upon release, this functionality is available in Stage, Live, and Pilot portals for all organizations using the Succession module.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

SMP Templates

SMP Templates

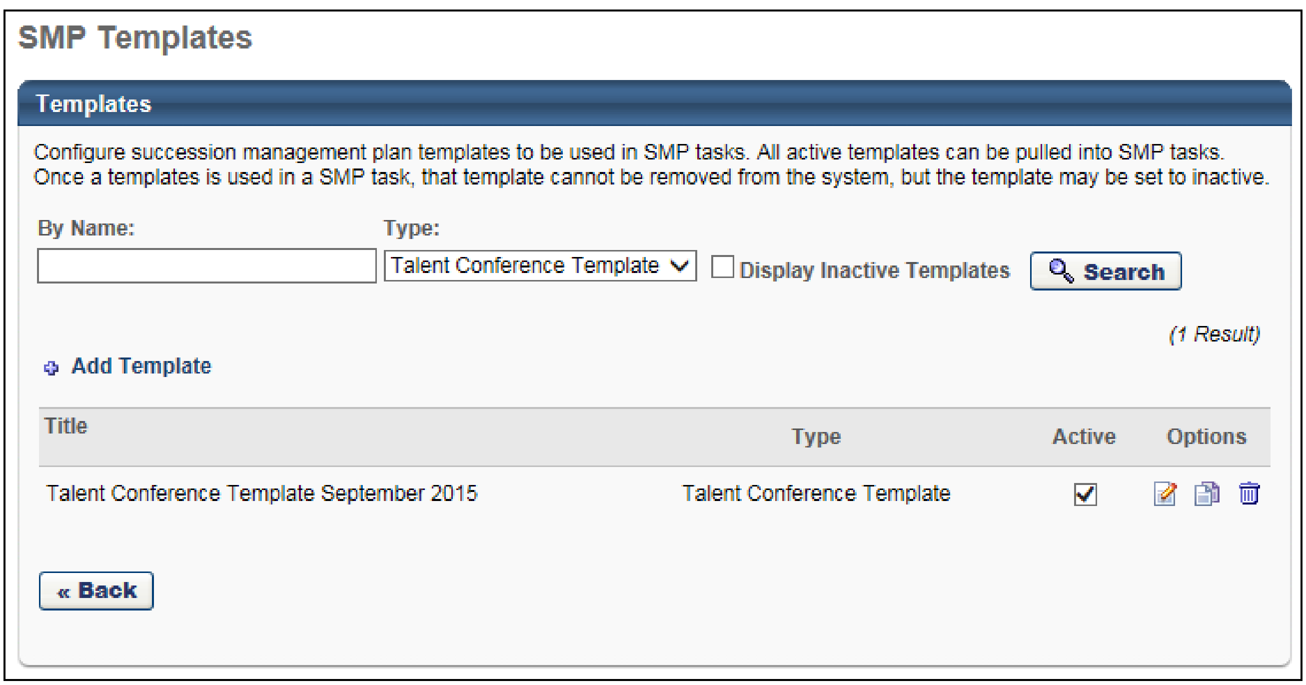
Within Succession Management, administrators can now create a Talent Conference Template. This is a new type of succession planning template. On the SMP Templates page, the **Type** filter now includes Talent Conference Template as a filter option.

If a Talent Conference template has been used in a SMP task, the template can be edited and copied, but it cannot be deleted.

To create an SMP Template, go to **Admin > Tools > Succession Management > Templates**. Then, click the **Add Template** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration



SMP Template - Create/Edit

Within Succession Management, administrators can now create a Talent Conference Template. This is a new type of succession planning template.

To create a SMP Template, go to **Admin > Tools > Succession Management > Templates**. Then, click the **Add Template** link.

To edit a SMP Template, go to **Admin > Tools > Succession Management > Templates**. Then, click the Edit icon to the right of the appropriate template.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration

In the **Type** drop-down menu, Talent Conference Template is now available as a template type. This type of succession planning template is used to schedule and manage talent review conferences, engaging multiple stakeholders within the organization to provide input in employee calibration decisions.

When Talent Conference Template is selected, the following steps are automatically included in the template:

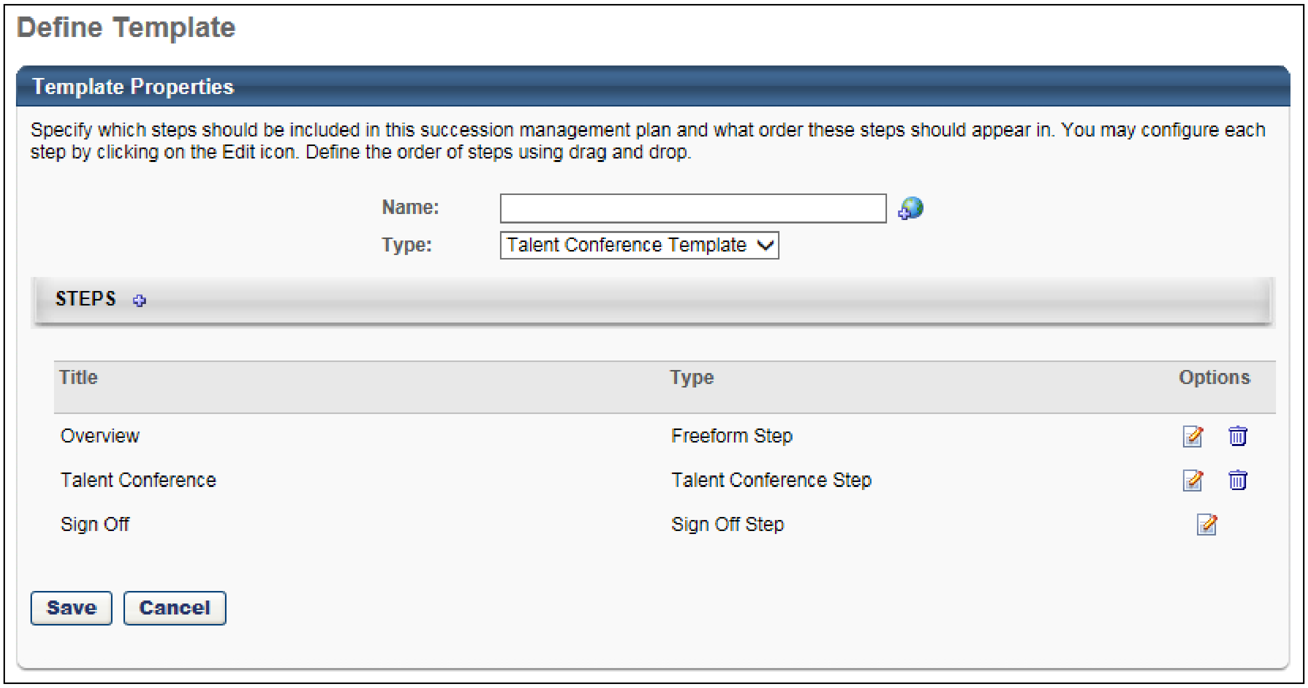
- Overview - Freeform Step - This is a previously existing step type that is used to provide instructions to moderators who are completing the talent conference task. Administrators can edit the step to configure the title and directions for the step. This step is optional, and can be removed from the template if needed.
- Talent Conference Step - At least one Talent Conference step must be added to the Talent Conference template.
- Sign Off Step - The Sign Off step enables the moderator to sign off on the finalized talent assessments. This step is completed when the talent conference is finished. Thus, it must be the last step in the talent conference template, and it cannot be removed from the template.

Additional steps can be added, but only additional Freeform and Talent Conference steps can be added.

As with other SMP template types, Talent Conference templates can be edited after it has been used within a SMP task. However, there are limitations on which fields can be edited:

- The template name can be edited.
- The template type cannot be edited.
- Overview - This step can be fully edited.
- Talent Conference Step - Only the step title can be edited.
- Sign Off - This step can be fully edited.

When editing a template, the *Modification History* section displays all modifications to the template.



SMP Template - Talent Conference Step

The Talent Conference step enables task moderators to configure and schedule a talent review conference, which engages multiple stakeholders within the organization to provide input in employee calibration decisions. This step utilizes the Talent Conference Helicopter View and metric grids to display each user's ratings and to calibrate ratings. Task moderators are able to record any succession rating calibration decisions, generate a summary report, and distribute the results to stakeholders.

To create an SMP Template, go to **Admin > Tools > Succession Management > Templates**. Then, click the **Add Template** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration

Enter the following information:

- **Title** - This is the name of the step, which is displayed to the assessor to indicate the current step. This field is required and the character limit is 50. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

SMP Metric Grid

This section enables administrators to configure which pre-configured SMP metric grids are included in the Talent Conference step. At least one metric grid must be selected.

To add a metric grid, click the plus icon to the right of the SMP Metric Grid section heading. The selected metric grids are added to the section, and they appear in the order they were added.

The administrator can configure whether or not calibration is allowed for the metric grid. An option appears for each axis of the metric grid, and both options are selected by default.

- When calibration is enabled for the X-axis, the talent conference moderator is able to override the original placement of employees along the X-axis of the Talent Conference Helicopter View.

- When calibration is enabled for the Y-axis, the talent conference moderator is able to override the original placement of employees along the Y-axis of the Talent Conference Helicopter View.
- When calibration is disabled for both axes, the Talent Conference Helicopter View cannot be modified. The moderator is only able to view the position of users within the Talent Conference Helicopter View.

The system displays metric grids in all languages based on the Availability and Active Status of the metric grid. The availability of the metric grid is set during the creation of the Metric Grid custom field. The active status of the metric grid is set in Custom Field Administration.

The display language of the metric grid is based upon the language preference of the administrator that is creating the SMP task.

- If there is a translation available that matches the administrator's language preference, the metric grid title is displayed in the administrator's language.
- If there is no translation available that matches the administrator's language preference, then the drop-down displays the metric grid title in the default language for the metric grid.

Custom Filters

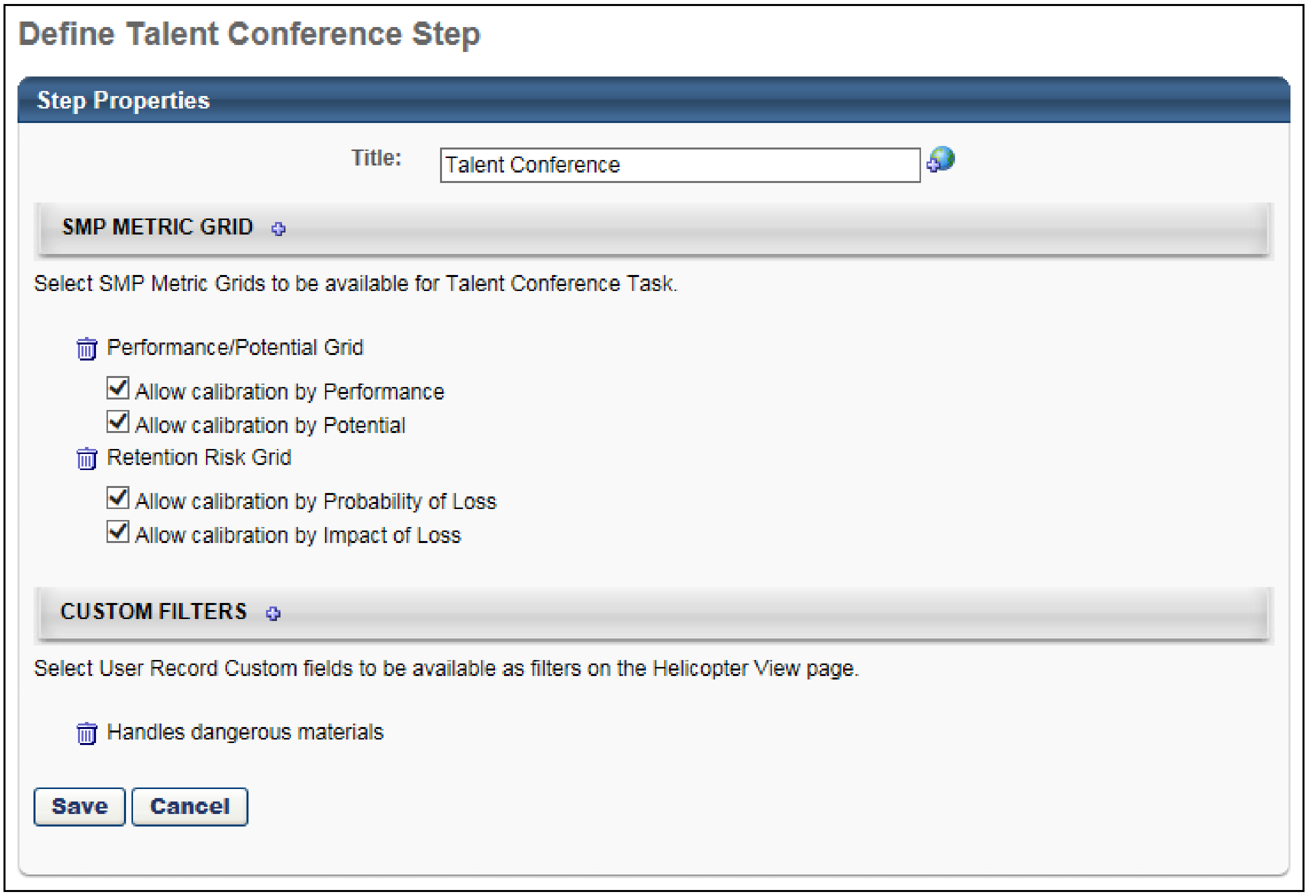
This section enables administrators to select user record custom fields to be available as filters on the Talent Conference Helicopter View.

To add a custom filter, click the plus icon to the right of the Custom Filter section heading. As a best practice, no more than four custom filters should be selected. The selected custom filters are added to the section, and they appear in the order they were added.

To remove a selected custom filter, click the Remove icon .

Save or Cancel

Click **SAVE** to save any unsaved changes to the step, or click **CANCEL** to discard any unsaved changes.


Define Talent Conference Step
Step Properties
Title:
Talent Conference
SMP METRIC GRID
Select SMP Metric Grids to be available for Talent Conference Task.
Performance/Potential Grid
Allow calibration by Performance
Allow calibration by Potential
Retention Risk Grid
Allow calibration by Probability of Loss
Allow calibration by Impact of Loss
CUSTOM FILTERS
Select User Record Custom fields to be available as filters on the Helicopter View page.
Handles dangerous materials
Save
Cancel

SMP Template - Sign Off Step

The Sign Off step enables the moderator to sign off on the finalized talent assessments. This step is completed when the talent conference is finished. Thus, it must be the last step in the talent conference template, and it cannot be removed from the template.

The configured title and directions appear on the Summary page of the talent conference meeting.

To create an SMP Template, go to **Admin > Tools > Succession Management > Templates**. Then, click the **Add Template** link.

Permissions

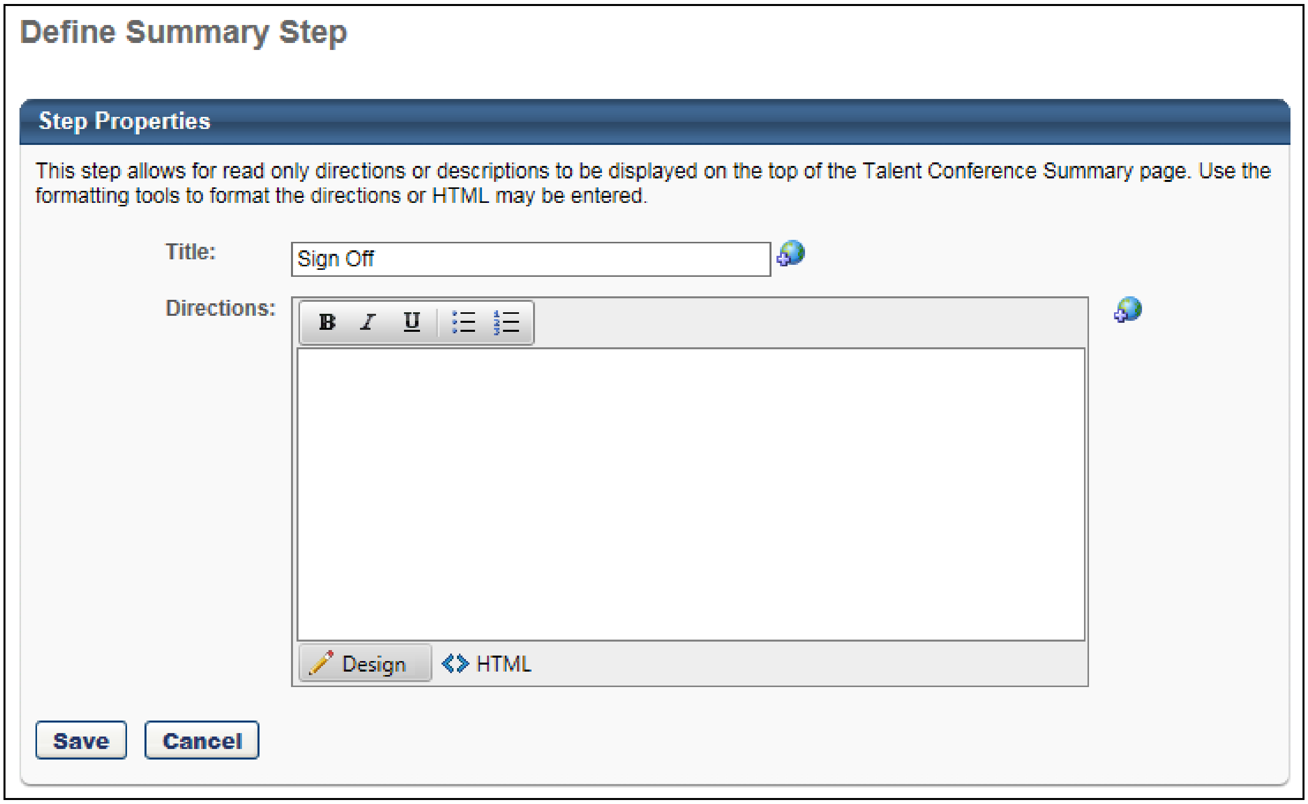
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration

Enter the following information:

- **Title** - This is the name of the step, which is displayed to the assessor to indicate the current step. This field is required and the character limit is 50. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **Directions** - The directions are displayed to the user during the step and are intended to explain something to the user or direct the user. This field has standard formatting options and accepts HTML. The character limit is 3000. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

Save or Cancel

Click **SAVE** to save any unsaved changes to the step, or click **CANCEL** to discard any unsaved changes.


Define Summary Step
Step Properties
This step allows for read only directions or descriptions to be displayed on the top of the Talent Conference Summary page. Use the formatting tools to format the directions or HTML may be entered.
Title:
Sign Off
Directions:
Design
HTML
Save
Cancel

SMP Task Administration

SMP Task Administration

Within SMP Task Administration, administrators can view and manage Talent Conference type SMP tasks. This is a new type of SMP task. On the SMP Task Administration page, the **Type** filter now includes SMP Talent Conference Task as a filter option.

Talent Conference tasks cannot be dynamically assigned, so the **Dynamically Assigned** option is disabled for this task type.

A Talent Conference task can be in the following statuses:

- Queued - This status indicates that the task has been created, but it has not been processed.
  - The administrator is able to copy and edit the task.
- Not Started - This status indicates that none of the moderators who are assigned the task have launched the task.
  - The administrator is able to copy, edit, and delete the task.
  - When editing the task, the following limitations are applied on the General step:
    - Plan Type cannot be modified.
- In Progress - This status indicates that at least one of the moderators has launched the task.
  - The administrator is able to copy the task, view the task settings, and view the details of the task.
- Completed - This status indicates that the task has been completed.
  - The administrator is able to copy the task, view the task settings, and view the details of the task.
- Expired - This status indicates that the task period has passed.
  - The administrator is able to copy the task, view the task settings, and view the details of the task.

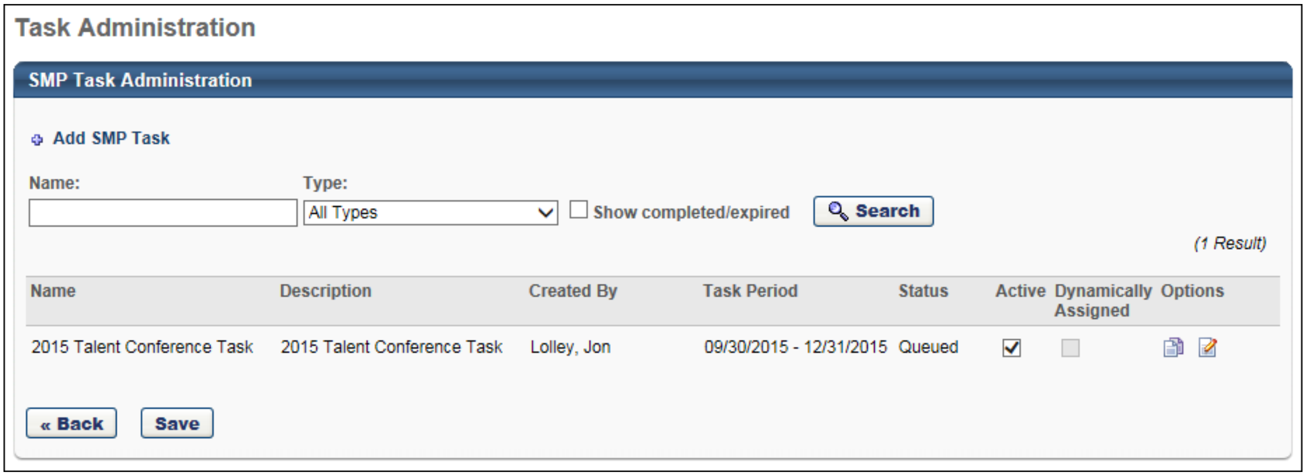
The Add User option is not available for Talent Conference tasks. Co-planners can be added when viewing the task details.

To access SMP Task Administration, go to **Admin > Tools > Succession Management > Tasks**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within	Talent/Succession - Administration

	those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	



SMP Task Administration - Task Details

The Task Details page provides an overview of the completion progress of the succession task. Administrators can also perform actions, such as extending due dates and assigning co-planners for individual tasks

To view the details of a succession, go to **Admin > Tools > Succession Management > Tasks**. Then, click the View Details icon for the appropriate task.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Task Status Overview

At the top of the page, an overview of the task progress is displayed. This includes the following details:

- Overall Progress
- Tasks Assigned
- Tasks Completed
- Tasks Incomplete
- Task Period
- Template

Extend End Date

To extend the end date of the entire task, click the **Extend End Date** link. The administrator can then enter a new end date and then click the Save icon to save the change.

Status Pie Chart

The pie chart displays the percentage of users for each status.

Export Task Details

To export the task details, click either the Print icon to export the task details to PDF, or click the Excel icon to export the task details to Microsoft Excel.

Task Users

This section displays the users in the task. Administrators can search for specific users by first name, last name, and task status.

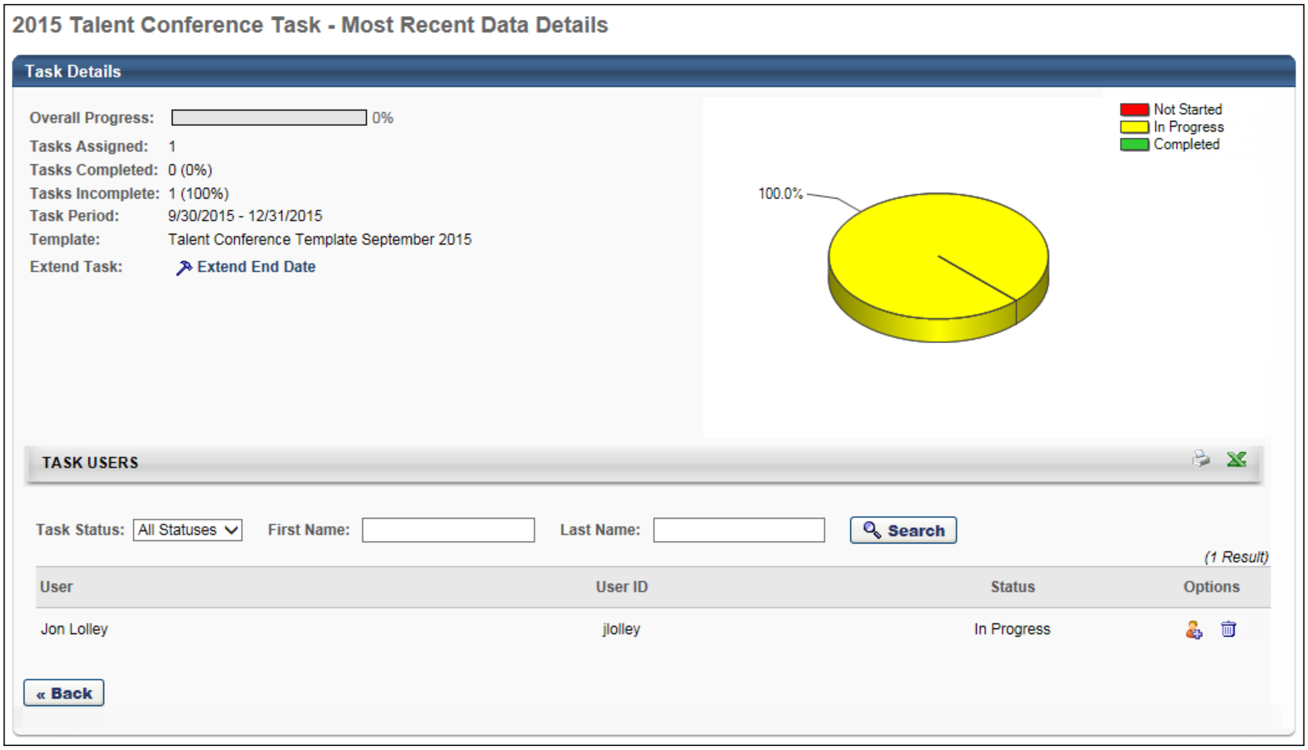
The following information is displayed for each user:

- User Name
- User ID
- Status

User Options

The following options may be available for a user:

- Add Co-Planner - Click this icon to add or remove co-planners from the user's task. This opens the Co-planners pop-up which displays all existing co-planners for the user, including default co-planners and co-planners added by the user.
  - Remove Co-planner - To remove a co-planner, click the Remove icon. If a default co-planner is removed, the removed co-planner would have to be manually added to the individual task, if necessary. Co-planners that are removed no longer have access to the task unless added again by the administrator or assigned user.
  - Add Co-planner - To add a co-planner, click the **Add Co-Planner** link. Once a co-planner is saved, the new co-planner is assigned the individual task as a co-planner. The task will appear on their Schedule Tasks page.
- Remove - Click this icon to remove the user from the task.


2015 Talent Conference Task - Most Recent Data Details
Task Details
Overall Progress: 0%
Tasks Assigned: 1
Tasks Completed: 0 (0%)
Tasks Incomplete: 1 (100%)
Task Period: 9/30/2015 - 12/31/2015
Template: Talent Conference Template September 2015
Extend Task: Extend End Date
Not Started
In Progress
Completed
100.0%
TASK USERS
Task Status: All Statuses
First Name:
Last Name:
Search
(1 Result)
User
User ID
Status
Options
Jon Lolley
jlolley
In Progress
« Back

SMP Talent Conference Task - Create - General

An SMP Talent Conference Task is used to schedule and manage talent review conferences, engaging multiple stakeholders within the organization to provide input in employee calibration decisions. Task moderators are able to record any succession rating calibration decisions, generate a summary report, and distribute the results to stakeholders.

When creating or editing a talent conference task, the General step enables administrators to define the task details, including the plan type, succession template, and the source of the succession data that is used within the task.

To create a Succession Management Planning (SMP) task, go to **Admin > Tools > Succession Management > Tasks**. Then, click the **Add SMP Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Enter the following information for the task:

General

- **Task Name** - Enter a meaningful name for the SMP task. The character limit for this field is 100. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **Description** - Enter a description of the task. The character limit for this field is 500. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

Details

- **Task Period** - Using the From and To date values, select the start and end dates of the task. This defines when the moderators can access and begin completing the task.
- **Plan Type** - From the drop-down list, select SMP Talent Conference Task. This selection determines which SMP templates are available in the **Template** field. This selection also affects certain configuration options for the task.

- **Template** - Click the Select icon to select the specific template to use in the task. When SMP Talent Conference Task is selected in the **Plan Type** field, only SMP Talent Conference templates are available for selection. The template that is selected determines the steps that the assessor completes for the task. A template must be created prior to creating the task in order for it to be available for selection.
- **Select the source of succession data** - Select the source of the succession data that will be displayed in the Talent Conference Helicopter View page of the talent conference.
  - Most Recent Succession Data - When this option is selected, the Talent Conference Helicopter View is automatically populated with the most recent succession data for users. This is the most recent data from any succession task.
  - Select SMP Task - When this option is selected, the Talent Conference Helicopter View is automatically populated with the succession data from a specific in progress or completed succession task. Click the Select icon to select the desired succession task.

Update SMP Ratings

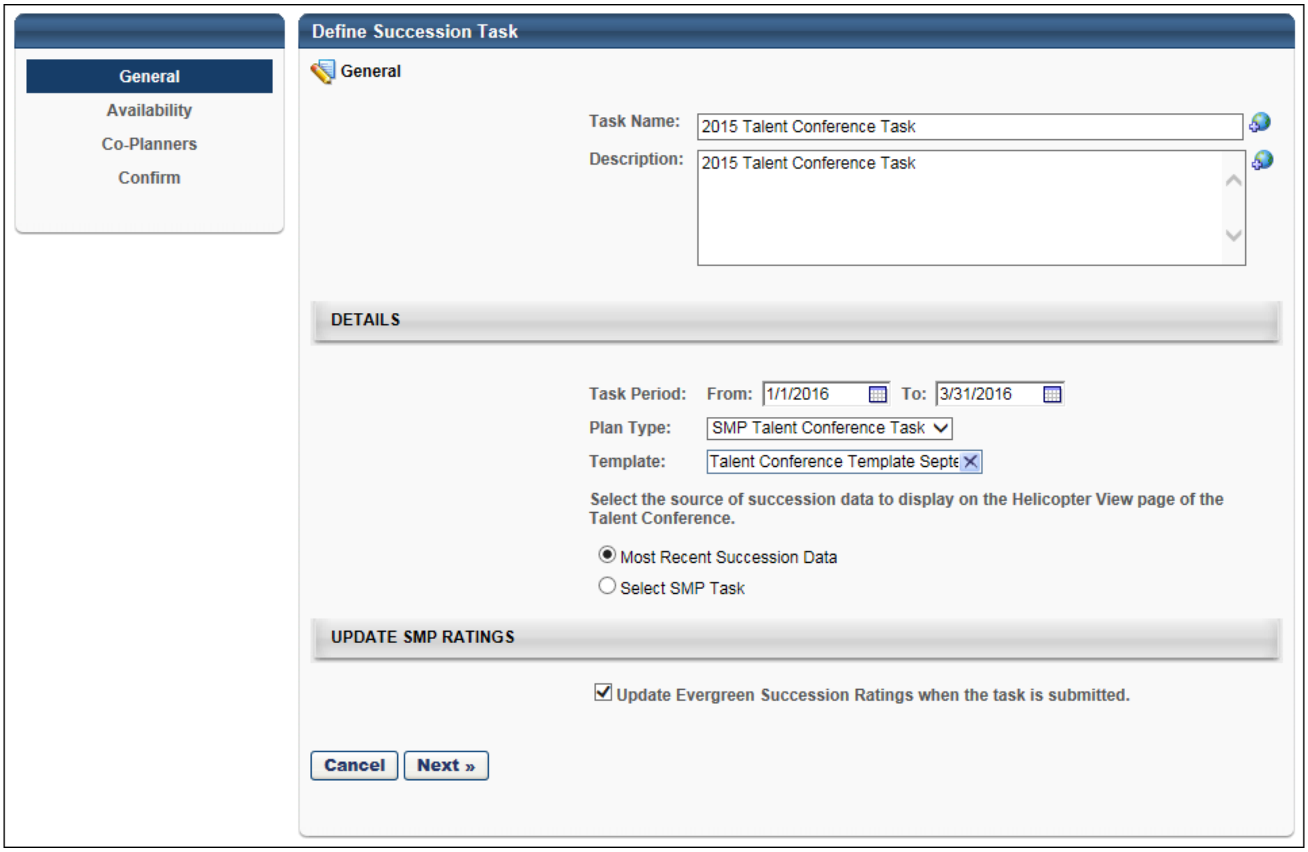
- **Update Evergreen Succession Ratings when the task is submitted** - When this option is selected, the Evergreen succession ratings of each user in the talent conference task are updated with the ratings from the talent conference task as soon as the task is submitted. The updated Evergreen ratings are then updated wherever Evergreen ratings are used. When this option is not selected, the users' Evergreen ratings are not impacted by the talent conference task.

Use Case: An executive team performs employee calibration and does not want to share the calibrated data. This data is only available within the talent conference task and is available via reports.

Cancel or Next

Click **CANCEL** to discard any unsaved changes and return to the SMP Task Administration page. *See* **SMP Task Administration** *on* page 532 *for additional information.*

Click **NEXT** to proceed to the Availability step. *See* **SMP Talent Conference Task - Create - Availability** *on* page 541 *for additional information.*


General
Availability
Co-Planners
Confirm
Define Succession Task
General
Task Name:
2015 Talent Conference Task
Description:
2015 Talent Conference Task
DETAILS
Task Period: From: 1/1/2016 To: 3/31/2016
Plan Type: SMP Talent Conference Task
Template: Talent Conference Template Septe
Select the source of succession data to display on the Helicopter View page of the Talent Conference.
Most Recent Succession Data
Select SMP Task
UPDATE SMP RATINGS
Update Evergreen Succession Ratings when the task is submitted.
Cancel
Next »

SMP Talent Conference Task - Create - Availability

When creating or editing a talent conference task, the Availability step enables administrators to determine who will serve as moderator for the talent conference task. This step also determines which users the moderator can select as assessors or assessees for the task. The moderators are assigned the task and they are able to select which employees within their set visibility will be reviewers and which employees will be calibrated during the talent conference task.

To create a Succession Management Planning (SMP) task, go to **Admin > Tools > Succession Management > Tasks**. Then, click the **Add SMP Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Select Moderators

To select a moderator for the task, click the plus icon to the right of the Availability section heading. This opens a Select User pop-up, in which administrators can select moderators. All selected moderators appear in the Moderator table.

To remove a moderator, click the Remove icon to the left of the appropriate moderator.

At least one moderator must be selected.

Select Visibility

The visibility of each moderator determines which users the moderator can select to be calibrated within the talent conference task. For example, if a Division A is selected for a moderator, then the moderator is able to select users from Division A to be assessed in the talent conference task.

To select visibility for a moderator, select the appropriate availability from the Visibility drop-down list. Multiple OUs can be selected.

- After selecting an OU, you may also choose to include the subordinate OUs in the visibility. **Note:** *When you include subordinate OUs, you include all subordinate OUs, not just the direct subordinate OUs.*
- As a best practice, if the task uses ratings from a specific succession task, the visibility should match the population of users who were included in the succession task.

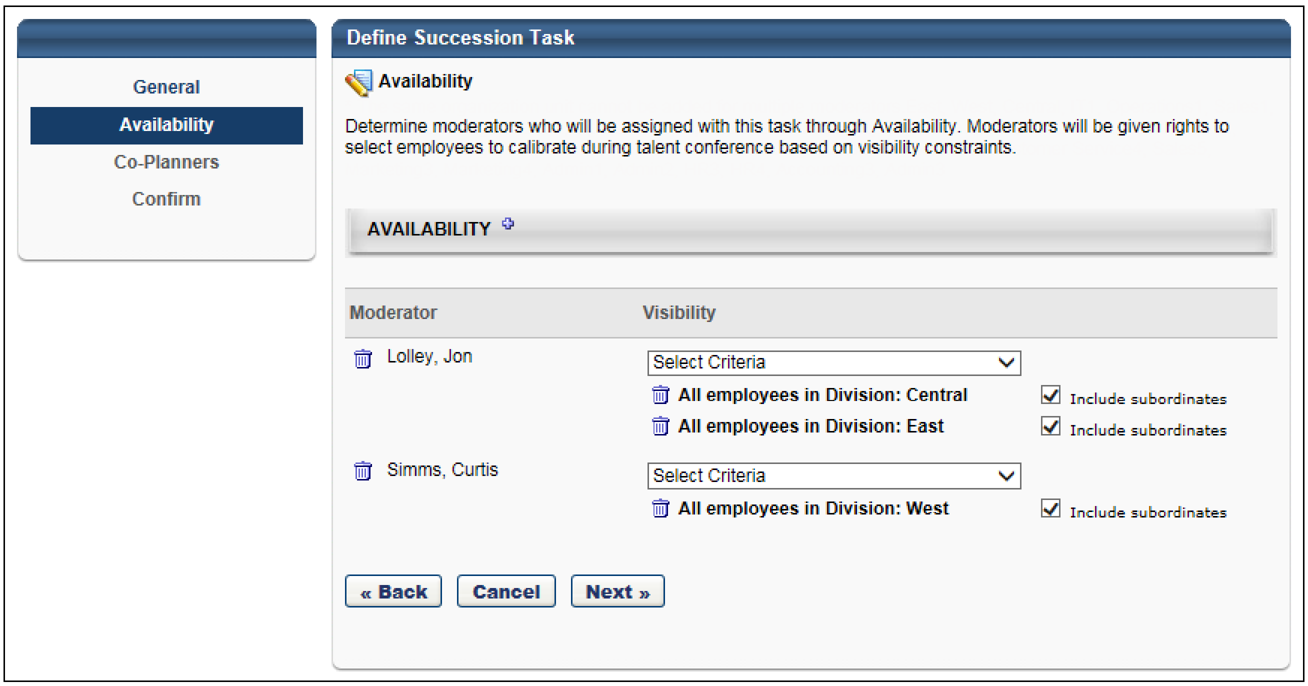
Visibility must be set for each moderator, and moderators cannot share visibility.

Back, Cancel, or Next

Click **BACK** to return to the General step. *See* **SMP Talent Conference Task - Create - General** *on* page 538 *for additional information.*

Click **CANCEL** to discard any unsaved changes and return to the SMP Task Administration page. *See* **SMP Task Administration** *on* page 532 *for additional information.*

Click **NEXT** to proceed to the Co-Planners step. *See* **SMP Talent Conference Task - Create - Co-Planners** *on* page 543 *for additional information.*



SMP Talent Conference Task - Create - Co-Planners

When creating or editing a talent conference task, the Co-Planners step enables administrators to configure whether moderators can select co-planners for their task. This step also enables administrators to select default co-planners for the task.

Co-planners have access to all functionality that is available to moderators. Adding and allowing co-planners is optional.

To create a Succession Management Planning (SMP) task, go to **Admin > Tools > Succession Management > Tasks**. Then, click the **Add SMP Task** link.

Permissions

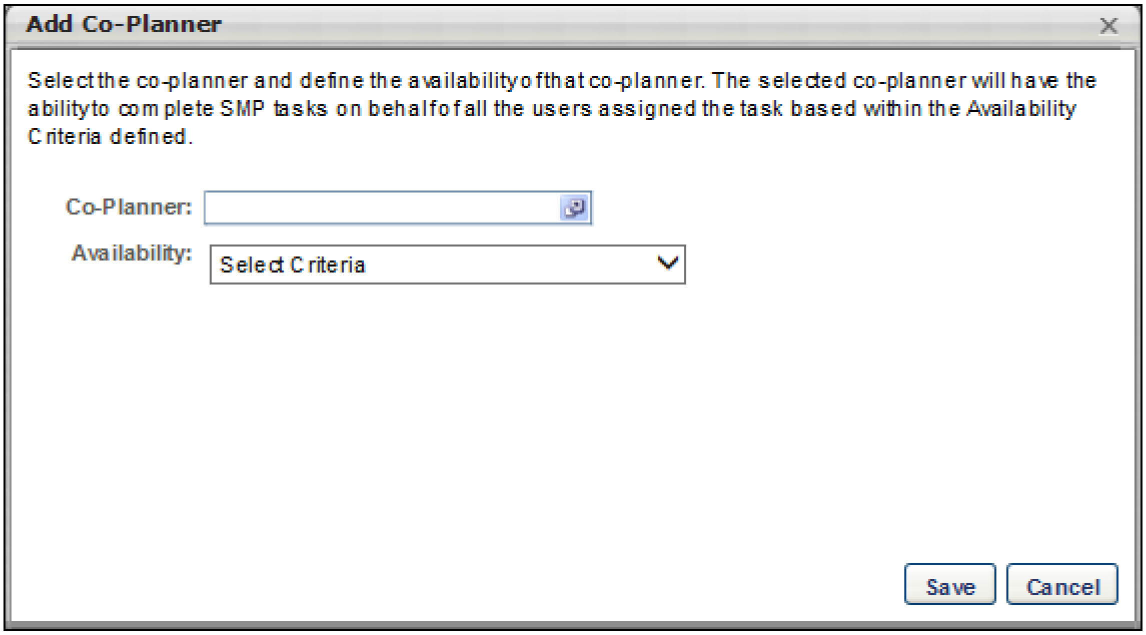
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Allow users to select co-planners

To allow moderators to select their own co-planners during the task, select the **Allow users to select co-planners** option.

Add Default Co-planners

To add a default co-planner for the task, click the plus icon to the right of the Default Co-Planners heading. Adding co-planners is optional. Default co-planners are automatically set as co-planners based on availability, regardless of whether or not the moderators are able to select their own co-planners. The Add-Co-Planner pop-up appears.



To edit a default co-planner's availability, click the Edit icon .

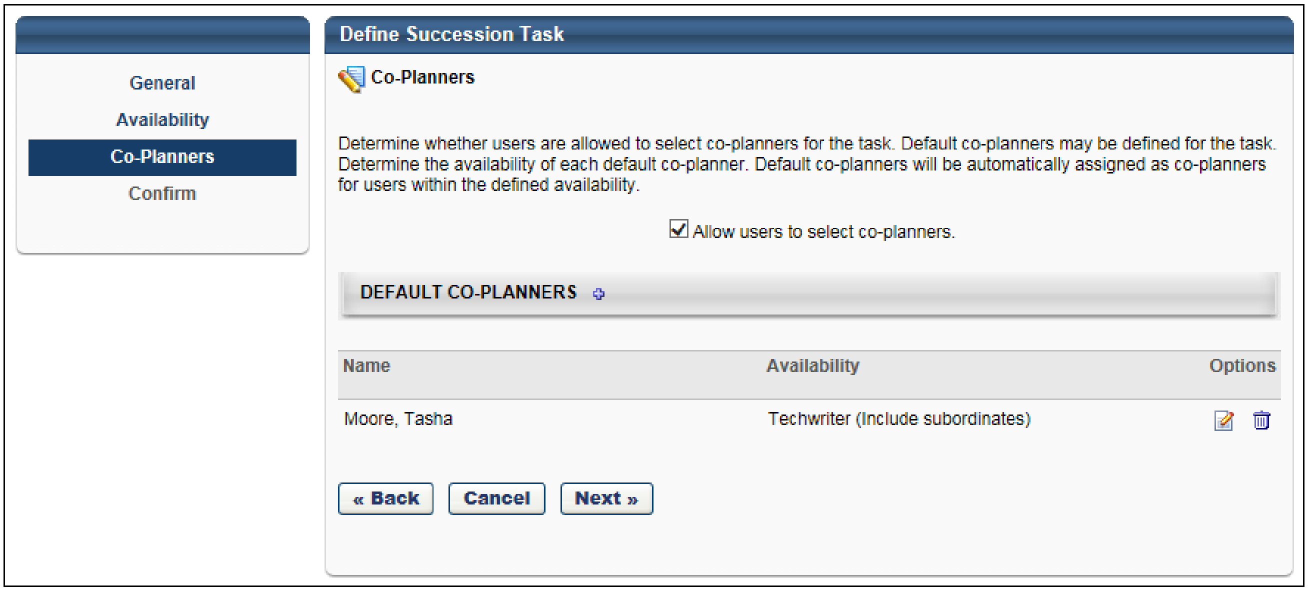
To remove a default co-planner, click the Remove icon .

Back, Cancel, or Next

Click **BACK** to return to the Availability step. *See* **SMP Talent Conference Task - Create - Availability** *on* page 541 *for additional information.*

Click **CANCEL** to discard any unsaved changes and return to the SMP Task Administration page. *See* **SMP Task Administration** *on* page 532 *for additional information.*

Click **NEXT** to proceed to the Confirm step. *See* **SMP Talent Conference Task - Create - Confirm** *on* page 546 *for additional information.*


General
Availability
Co-Planners
Confirm
Define Succession Task
Co-Planners
Determine whether users are allowed to select co-planners for the task. Default co-planners may be defined for the task. Determine the availability of each default co-planner. Default co-planners will be automatically assigned as co-planners for users within the defined availability.
Allow users to select co-planners.
DEFAULT CO-PLANNERS
Name
Availability
Options
Moore, Tasha
Techwriter (Include subordinates)
« Back
Cancel
Next »

SMP Talent Conference Task - Create - Confirm

When creating or editing a talent conference task, the Confirm step displays the task settings. This enables administrators to verify the task settings prior to creating the task.

To create a Succession Management Planning (SMP) task, go to **Admin > Tools > Succession Management > Tasks**. Then, click the **Add SMP Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Back, Save, or Cancel

Click **BACK** to return to the Co-Planners step. *See* **SMP Talent Conference Task - Create - Co-Planners** *on* page 543 *for additional information.*

Click **SAVE** to save the task and proceed to the SMP Task Administration page. The task is distributed to all users selected in the Availability step regardless of the user's language preference. If enabled, the Succession Task Assigned email is triggered. *See* **SMP Task Administration** *on* page 532 *for additional information.*

Click **CANCEL** to discard any unsaved changes and return to the SMP Task Administration page. *See* **SMP Task Administration** *on* page 532 *for additional information.*

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Succession Task Assigned	If this email trigger is active when the SMP task is saved, an email is sent to the selected recipients. This email trigger can be sent to the SMP task recipient or a specific user.	Succession Management

General
Availability
Co-Planners
Confirm
Define Succession Task
Confirm
Task Title: 2015 Talent Conference Task
Description: 2015 Talent Conference Task
Task Period: 9/30/2015 - 12/31/2015
Task Type: SMP Talent Conference Task
Template: Talent Conference Template September 2015
Availability: Simms, Curtis
Lolley, Jon
« Back
Save
Cancel

Assigned Talent Conference Tasks

When a talent conference task is assigned to a user, the task appears in the following areas for the user:

- Scheduled Tasks - Click the task title to launch the first step of the task.
- Universal Profile: Actions - Click the task title to launch the first step of the task. Also, the following actions are available for the task:
  - Launch - Select this option to launch the first step of the task.

To view scheduled tasks, go to **Home > Scheduled Tasks**.

To view action items, go to **Home > Universal Profile**. Then, click the Actions tab.

SMP Task - Complete

SMP Talent Conference Task - Overview Step

When completing a Talent Conference task, the Overview step may provide an overview and instructions for the task.

To open a succession planning task, go to Home > Scheduled Tasks. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

Actions Panel Options

The following actions are available from the Actions panel:

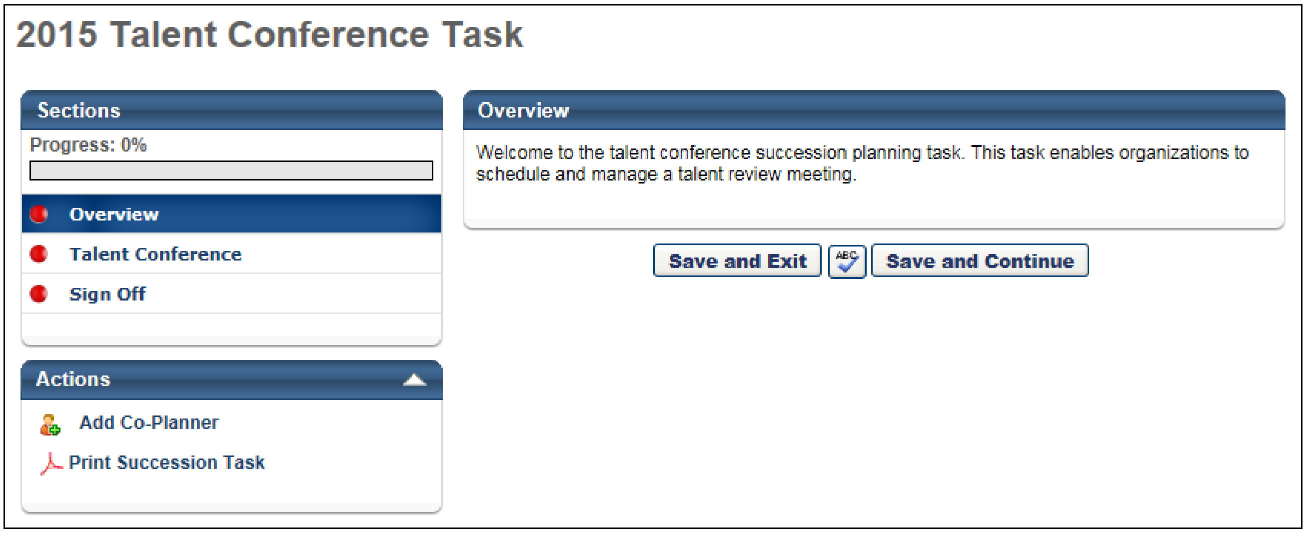
- **Add Co-Planner** - This action enables the assessor to add and remove co-planners for the SMP task. Click this link to select co-planners. The selected co-planners appear below this link. To remove a selected co-planner, click the Remove icon to the left of the co-planner's name. This option is only available if the succession task is configured to allow assessors to select co-planners.
- **Print Succession Task** - This action enables the reviewer to print a PDF version of the SMP task.

Navigation Buttons

The following navigation buttons are available at the bottom of the page:

- **PREVIOUS** - This button takes users to the previous step of the succession task. This button is not available on the first page of the succession task.
- **SPELL CHECK** - This button performs a spell check on all text boxes on the page. This option is only available in sections where it is applicable.
- **SAVE AND EXIT** - This button saves the assessor's progress and exits the SMP task.
- **SAVE AND CONTINUE** - This button saves the assessor's progress and proceeds to the next step of the SMP task. This button is not available on the final page of the SMP task.
- **SUBMIT** - This button submits the SMP task. This button is only available when all sections of the task are complete.

When in read-only mode, the available buttons are **PREVIOUS**, **EXIT**, and **NEXT**.


2015 Talent Conference Task
Sections
Progress: 0%
Overview
Talent Conference
Sign Off
Actions
Add Co-Planner
Print Succession Task
Overview
Welcome to the talent conference succession planning task. This task enables organizations to schedule and manage a talent review meeting.
Save and Exit
Save and Continue

SMP Talent Conference Task - Talent Conference Step

When completing a Talent Conference task, the Talent Conference step enables the moderator (assessor) to schedule a talent conference meeting, select the participants of the meeting, and manage the outcomes of the meeting.

To open a succession planning task, go to **Home > Scheduled Tasks**. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

Talent Conference Settings

This section enables the moderator to set the reviewers and assessees for the talent conference.

Reviewers are optional. To add a reviewer, click the **Add Reviewer(s)** link. This opens the Select User pop-up, in which multiple reviewers can be selected.

- To remove a reviewer, click the Remove icon to the left of the reviewer.

To add employees for calibration within the talent conference, select the appropriate organizational unit (OU) type (OU, Group, or User) from the drop-down menu. Then, click the Select icon to select the appropriate OUs, groups, or users. The moderator can select any OU, group, or users that are within the visibility that is set for them in the talent conference task.

- After selecting an OU, you may also choose to include the subordinate OUs. **Note:** *When you include subordinate OUs, you include all subordinate OUs, not just the direct subordinate OUs.*
- The maximum number of users who can be added as assessees is 2,000. However, only 600 users can be displayed on the Talent Conference Helicopter View at one time. If more than 600 users are selected, then the moderator must apply filters on the Talent Conference Helicopter View page to limit the number of users that are displayed on the grid.
- If a user's OUs are updated, and the user is either added to the talent conference or is removed from the talent conference, this is processed on a nightly basis.
- To remove an OU, click the Remove icon to the left of the OU.

Talent Conference Schedule

This section enables the moderator to define the talent conference schedule. Enter the following information to schedule the talent conference:

- **Add Talent Conference Location** - If the talent conference will take place in a physical location rather than virtually, then click this link to select the location for the talent conference. The location must be defined before it is available to be selected.
- **Date** - Select the date on which the talent conference is scheduled. This cannot be a date in the past. This is required.
- **Start Time** - Select the start time of the talent conference. This is required.
- **End Time** - Select the end time of the talent conference. This is required.
- **Time Zone** - Select the time zone in which the talent conference is scheduled. This is pre-populated with the moderator's time zone. This time zone should correlate with the selected start and end time.
- **Comments** - In this field, enter any comments that should be sent to reviewers. These comments can be included in the Talent Conference Scheduling Notification email trigger, if enabled. Also, these comments will be included when reviewers receive an email invitation for the talent conference.

Preview in Outlook

Click this button to preview the meeting invitations that will be sent to reviewers when the meeting is scheduled. This enables the moderator to utilize their email tool's scheduling tools to check if the selected schedule is in line with the reviewers' calendar availability.

Save and Send to Reviewer(s)

Click this button to save the talent conference settings. This also triggers the Talent Conference Scheduling Notification email trigger, if enabled. This email trigger also has a calendar meeting request file attached, which can be saved to the recipient's calendar tool. If this email trigger is not configured, then no email is sent.

Assessees are required and must be selected prior to saving the talent conference. After this button is clicked, the reviewers and assessees are locked and can no longer be modified.

- The email details are determined by the configuration of the email trigger in Email Administration.
- If this email trigger is not configured, then no email is sent.
- The attached meeting request reflects the selected schedule and location.
- The attached meeting request's subject and content reflect what is configured in the Talent Conference Scheduling Notification email trigger.

- The attached meeting request includes a link to the talent conference Talent Conference Helicopter View page.

If the talent conference schedule is updated and saved, then this triggers the Talent Conference Re-Scheduled email, if configured. This email trigger has a calendar meeting request file attached, which can be saved to the recipient's calendar tool.

Launch Conference/Open Conference

Click this button to immediately open the talent conference, regardless of when the talent conference is scheduled. Assessees are required and must be selected prior to launching the talent conference. After this button is clicked, the reviewers and assessees are locked and can no longer be modified. After the conference is initially launched, the **LAUNCH CONFERENCE** button is replaced with an **OPEN CONFERENCE** button.

The talent conference opens, in which the Talent Conference Helicopter View is displayed with all of the selected assessees plotted within the grid. *See* **SMP Talent Conference Task - Talent Conference Helicopter View** *on* page 556 *for additional information.*

Each time the talent conference is opened, the Talent Conference step is updated to reflect that the moderator launched the conference. "Last launched by [Moderator Name] on [Launch Date] at [Launch Time]" is displayed below the **Comments** field.

Actions Panel Options

The following actions are available from the Actions panel:

- **Add Co-Planner** - This action enables the assessor to add and remove co-planners for the SMP task. Click this link to select co-planners. The selected co-planners appear below this link. To remove a selected co-planner, click the Remove icon to the left of the co-planner's name. This option is only available if the succession task is configured to allow assessors to select co-planners.
- **Print Succession Task** - This action enables the reviewer to print a PDF version of the SMP task.

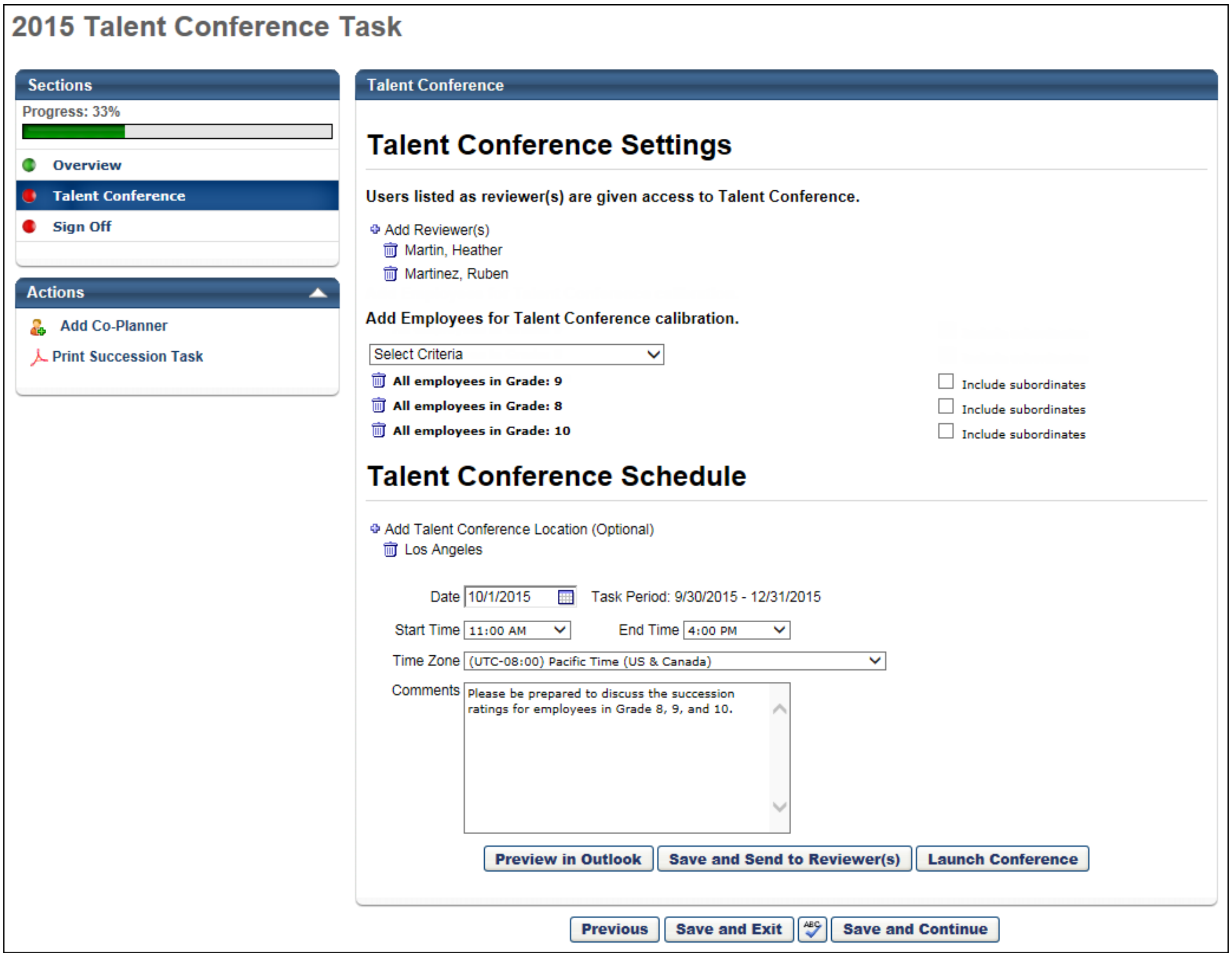
Navigation Buttons

The following navigation buttons are available at the bottom of the page:

- **PREVIOUS** - This button takes users to the previous step of the succession task. This button is not available on the first page of the succession task.
- **SPELL CHECK** - This button performs a spell check on all text boxes on the page. This option is only available in sections where it is applicable.

- **SAVE AND EXIT** - This button saves the assessor's progress and exits the SMP task.
- **SAVE AND CONTINUE** - This button saves the assessor's progress and proceeds to the next step of the SMP task. This button is not available on the final page of the SMP task.
- **SUBMIT** - This button submits the SMP task. This button is only available when all sections of the task are complete.

When in read-only mode, the available buttons are **PREVIOUS**, **EXIT**, and **NEXT**.



SMP Talent Conference Task - Talent Conference Helicopter View

The Talent Conference Helicopter View page enables moderators to view and update the metric grid placements for users. The configuration of the talent conference task determines which metric grids are available to rate users.

When the Talent Conference Helicopter View is loaded, users are placed in the metric grid based on previous succession ratings. Depending on the configuration of the talent conference task, the Talent Conference Helicopter View may use ratings from a specific succession task, or the Talent Conference Helicopter View may use the most recent succession data that is available for the user (Evergreen Succession Data).

- When Evergreen Succession Data is used, ratings may be pulled from multiple sources in order to position the user on the grid. Evergreen Succession Data is also displayed on the user's Succession Snapshot page.
- When succession data from a specific succession task is used, only data from the selected task can be used.

Moderators, reviewers, and co-planners are excluded from the Talent Conference Helicopter View.

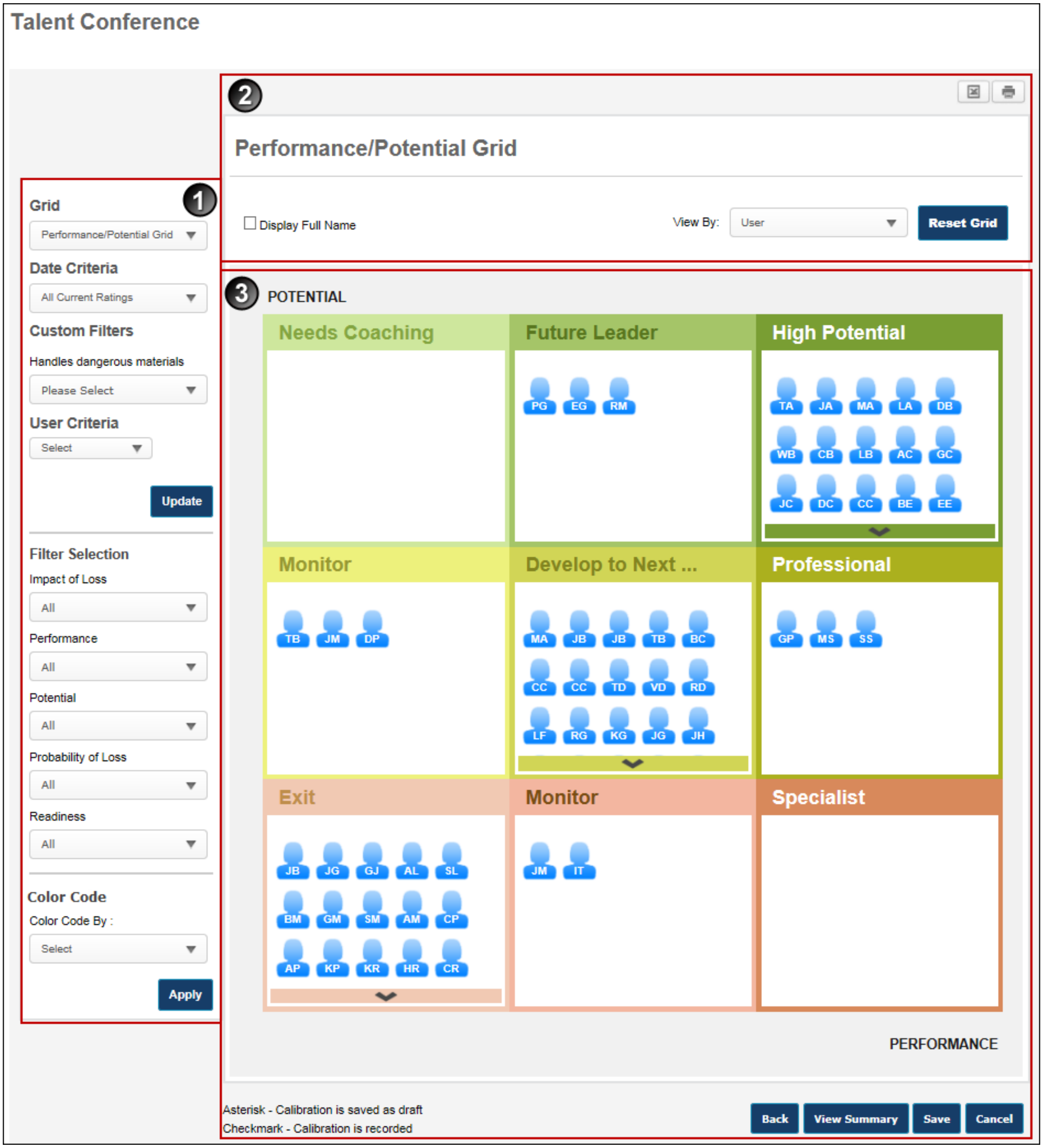
To open a succession planning task, go to **Home > Scheduled Tasks**. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

The Talent Conference Helicopter View is separated into the following sections:

FEATURE	DESCRIPTION
1	Grid Configuration - *See* **Talent Conference Helicopter View - Grid Configuration** *on* page 558 *for additional information.*
2	Display Options - *See* **Talent Conference Helicopter View - Display Options** *on* page 563 *for additional information.*
3	Grid Functionality - *See* **Talent Conference Helicopter View - Grid Functionality** *on* page 569 *for additional information.*


Talent Conference
Performance/Potential Grid
Display Full Name
View By:
User
Reset Grid
Grid
Performance/Potential Grid
Date Criteria
All Current Ratings
Custom Filters
Handles dangerous materials
Please Select
User Criteria
Select
Update
Filter Selection
Impact of Loss
Performance
Potential
Probability of Loss
Readiness
Color Code
Color Code By :
Apply
POTENTIAL
Needs Coaching
Future Leader
High Potential
Monitor
Develop to Next ...
Professional
Exit
Monitor
Specialist
PERFORMANCE
Asterisk - Calibration is saved as draft
Checkmark - Calibration is recorded
Back
View Summary
Save
Cancel

Talent Conference Helicopter View - Grid Configuration

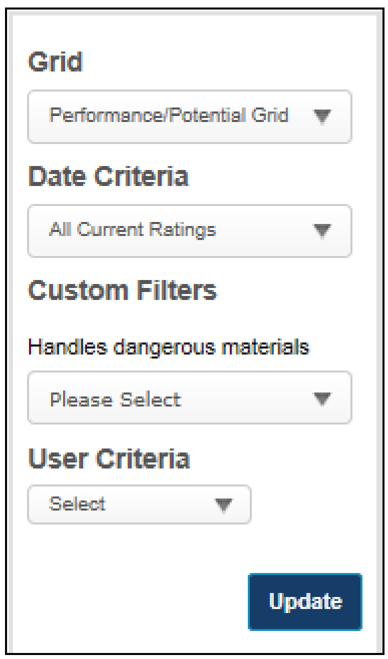
When viewing the Talent Conference Helicopter View within a talent conference task, the view settings on the left determine the information that is displayed within the grid.

To open a succession planning task, go to **Home > Scheduled Tasks**. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

Grid, Date, and User Options



Grid

This option is only available if more than one metric grid is available for the talent conference task.

The **Grid** drop-down list enables users to select the metric grid that displays. By default, when the Talent Conference Helicopter View is opened, the first grid that was selected for the talent conference task is displayed with the selected assessees plotted on the grid. Also, a grid is only available if the moderator is within the metric grid's availability settings.

Date Criteria

This option is only available if the talent conference task is configured to display the most recent succession data.

The **Date Criteria** drop-down list enables users to define the date range that is used to gather data for the grid. The system uses ratings or grid placements from the selected date range. All date criteria options are in relation to the current date.

A user appears in the grid if they have at least one rating value that was updated within the defined date criteria. The date on which a user's other ratings were updated does not disqualify them from the grid as long as at least one was updated within the date criteria. For example, if the date criterion is set to This Year, the system displays all users within the user criteria that have a grid placement or at least one rating value updated in the past 12 months.

Custom Filters

If the talent conference task is configured to include custom filters, then the custom filters appear below the **Date Criteria** drop-down menu. When a custom filter is set, the grid only displays users who match the selected criteria.

Custom filters appear in the order in which they were added to the talent conference task. Also, a custom filter is only available if the moderator is within the custom field's availability settings.

User Criteria

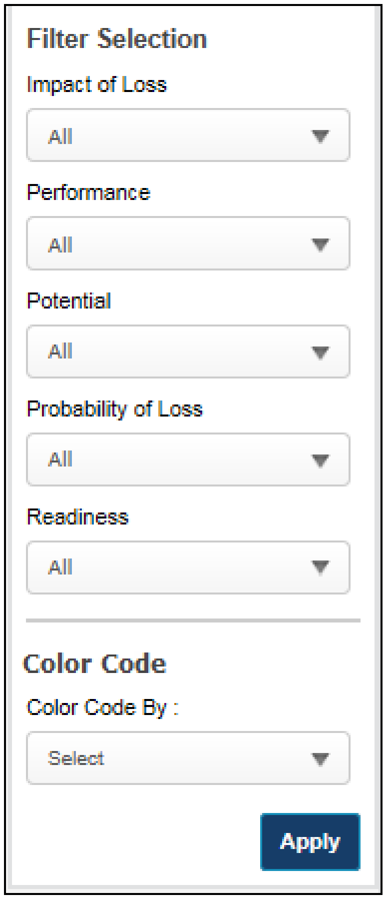
The **User Criteria** field enables users to select an OU or specific users to display in the grid. From the drop-down, select Users or the appropriate OU type. Then, click the Select icon to select the appropriate users or OU. The selected criteria appear below the **User Criteria** field. Select the **Include Subordinates** option to include subordinate users or OUs in the grid. **Note:** *The available users, OUs, and OU types are determined by the employee population selected on the Talent Conference step.*

Note: *The maximum number of users that can be displayed in Talent Conference Helicopter View is 600.*

Update

Click **UPDATE** to update the grid with the selected criteria.

Filter and Color Code Options



Filters

The Filters section enables users to filter the employees that are visible in the grid. The following filters are available in the Filters section:

Trend

The **Trend** filter enables users to filter employees based upon their grid placement history. The user must click **APPLY** after selecting a trend to apply the filter to the grid. **Note:** *This filter is only available if the talent conference task is configured to display the most recent succession data and if the* **Use Default Trend** *option is selected for the metric grid field in Custom Field Administration.*

All trends are evaluated with regards to their last update.

The following trend options are available:

- Growing - This trend displays all employees who have moved directly right one or more cells.

- Blossoming - This trend displays all employees who have moved diagonally up and to the right one or more cells.
- Leaping - This trend displays all employees who have moved directly up one or more cells.
- Focused on Performance - This trend displays all employees who have moved diagonally up and to the left one or more cells.
- Disappearing - This trend displays all employees who have moved directly left one or more cells.
- Diving - This trend displays all employees who have moved diagonally down and to the left one or more cells.
- Dropping - This trend displays all employees who have moved directly down one or more cells.
- Focused on Potential - This trend displays all employees who have moved diagonally down and to the right one or more cells.
- Static - This trend displays all employees who have not moved.
- No History - This trend displays all employees who do not have a previous grid placement.

Metric Rating Filters

A multi-select filter appears for each metric rating (e.g., Impact of Loss, Performance, Readiness) that is configured in My Team/Talent Profile Preferences. **Note:** *Metric rating filters only appear in this section if configured in My Team/Talent Profile Preferences.* The metric rating filters are multi-select, allowing the user to select one or more rating values. In addition to the metric rating values, the user can select the following options:

- No Rating - This option includes employees that have not been rated.
- All - This option includes all metric rating values as well as the No Rating value.

The user must click **APPLY** after selecting a filter option to apply the filter to the grid.

Color Code

The **Color Code** field enables the user to color code the employee icons within the grid based upon trends, rating scale metrics, or metric grids. Only one color code can be applied.

- Trend - This option color codes the employee icons according to their grid placement trend. **Note:** *This filter is only available if the talent conference task is configured to display the most recent succession data and if the* **Use**

Default Trend *option is selected for the metric grid field in Custom Field Administration.*

- Metric Rating Values - If a metric rating is selected, the employee icon colors are determined by the color attributed to the rating, as defined within Custom Field Administration. If there is no color attributed to a value, the value is displayed in blue. **Note:** *This option is only available if at least one metric rating is configured in My Team/Talent Profile Preferences.*
- Metric Grid Values - If a metric grid is selected, the employee icon colors are determined by the color attributed to the grid cell, as defined within Custom Field Administration. If there is no color attributed to a cell, the value is displayed in blue.

A color key is displayed below the selected Color Code section.

The user must click **APPLY** after selecting a color code option to apply the color code to the grid.

Talent Conference Helicopter View - Display Options

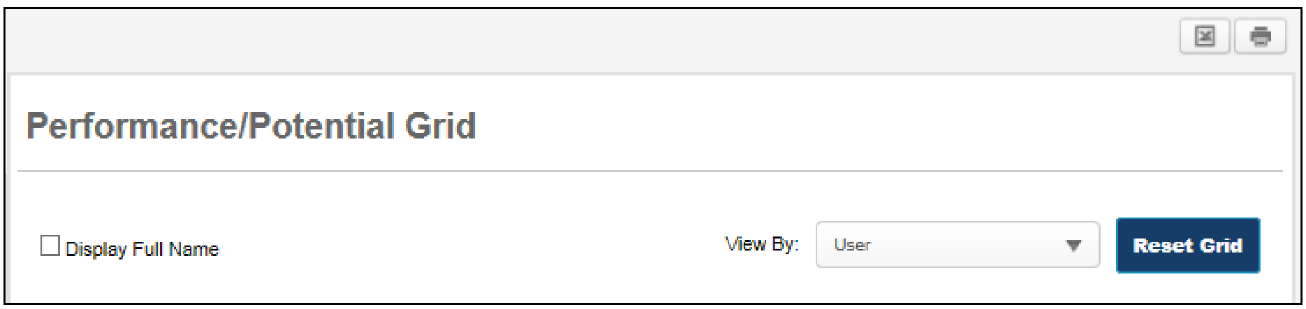
When viewing the Talent Conference Helicopter View within a talent conference task, the display options at the top of the grid enable moderators to export the grid data and adjust how data appears on the grid.

To open a succession planning task, go to **Home > Scheduled Tasks**. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

The following display options are available for the Talent Conference Helicopter View:



Print Talent Conference Helicopter View

Excel  - Click the Excel icon to generate a Microsoft Excel version of the current grid. The worksheet displays the title of the grid, criteria used in the grid, filters applied to the grid, and color code settings. The grid in the printout displays each user's full name.

Print  - Click the Print icon to generate a PDF version of the current grid. The PDF displays the title of the grid, criteria used in the grid, filters applied to the grid, and color code settings. The grid in the printout displays each user's full name.

Display Full Name

Select this option to display each employee's full name on the grid rather than the employee's initials.

View By

From this drop-down, users have the ability to change the grid view. The following options are available:

- User - This option displays the employees within the defined user criteria plotted within the grid.
- Percentage - This option displays the percentage of employees within the defined user criteria who have been rated or calibrated to be within each of the grid's cells. The percentage is displayed with two decimals of precision.
- Count - This option displays the number of employees within the defined user criteria who have been rated or calibrated to be within each of the grid's cells.

View By: User

The User View displays the employees within the defined user criteria plotted within the grid.

View By: Percentage

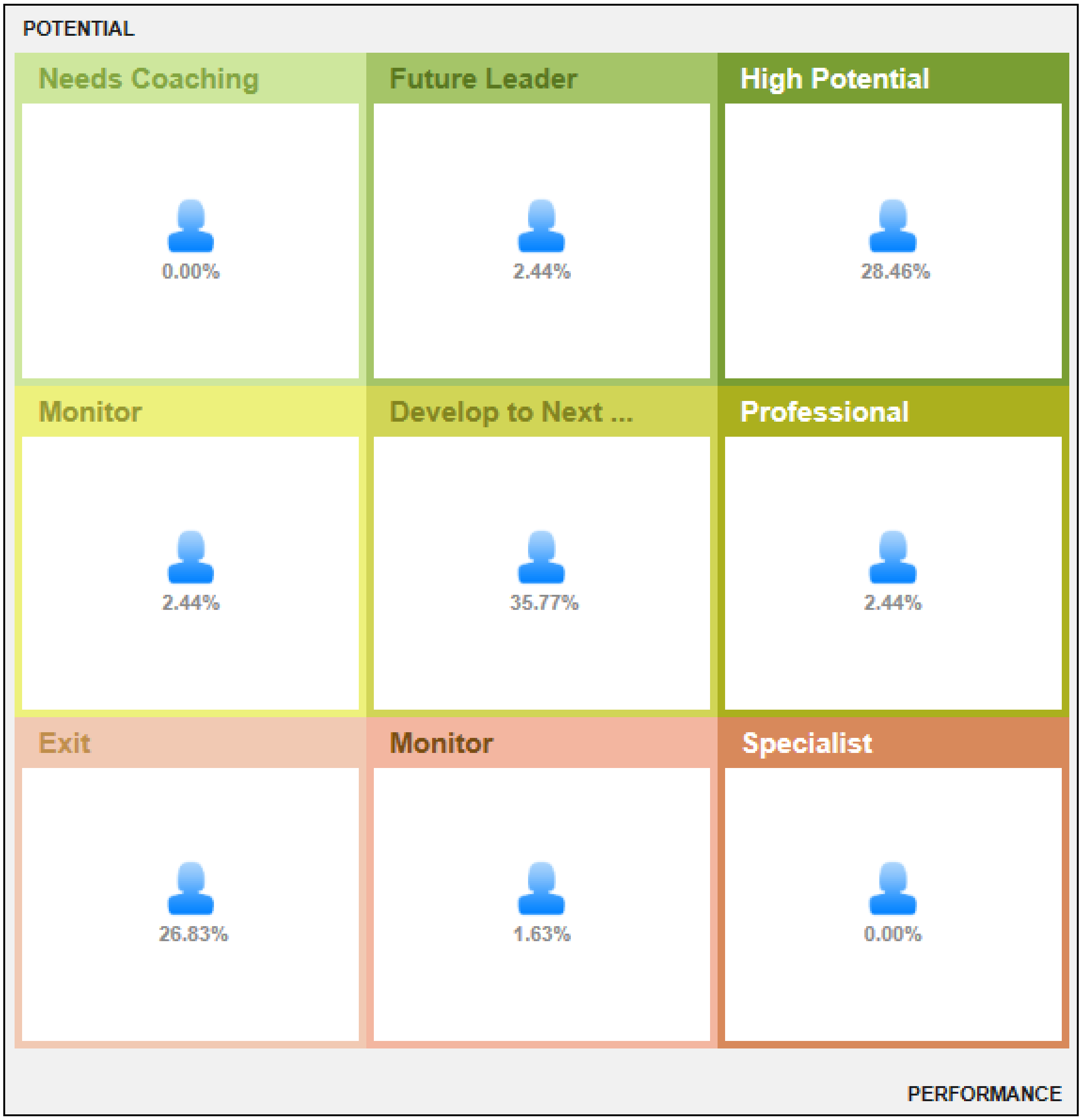
The Percentage View displays the percentage of employees within the defined user criteria who have been rated or calibrated to be within each of the grid's cells. The percentage is displayed with two decimals of precision.

The cell percentage is calculated based upon the employee grid placements. If a user's placement has been calibrated, then the calibrated placement is used for the calculation.

In Percentage View, the following functionality and controls are not available:

- Because no user icons are displayed, a user's grid position cannot be modified.

- Because no user icons are displayed, the **Display Full Name** option is disabled. If this option was selected prior to selecting Percentage View, then this option is deselected and then disabled.
- Trend filters are disabled.



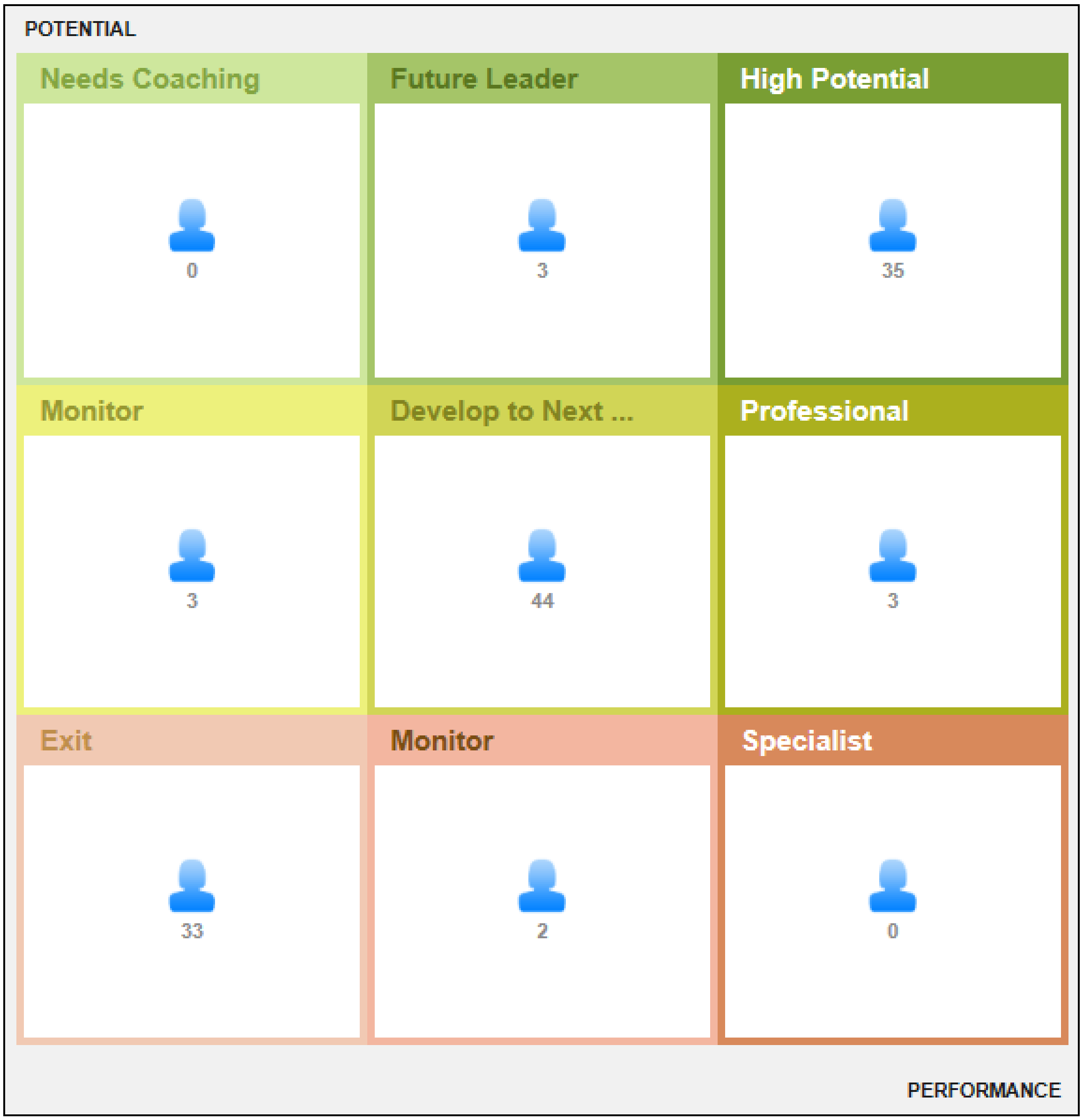
View By: Count

The Count View displays the number of employees within the defined user criteria who have been rated or calibrated to be within each of the grid's cells.

If a user's placement has been calibrated, then the calibrated placement is used for the calculation.

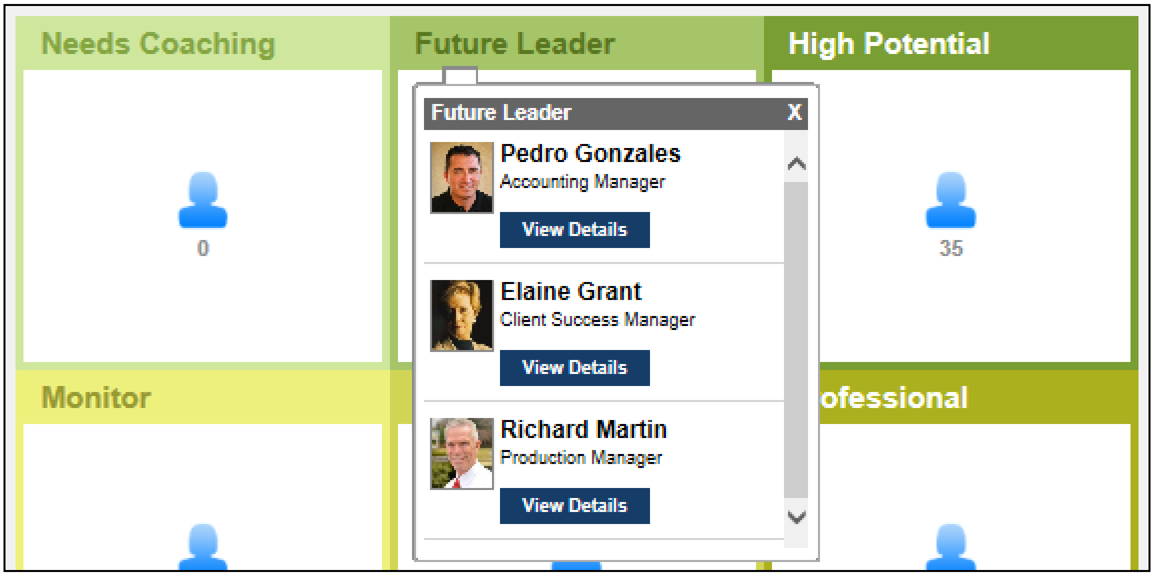
In Cell View, the following functionality and controls are not available:

- Because no user icons are displayed, a user's grid position cannot be modified.
- Because no user icons are displayed, the **Display Full Name** option is disabled. If this option was selected prior to selecting Count View, then this option is deselected and then disabled.



View Users within Cell

To view the users within a cell in Percentage or Count View, click the cell title. This displays a pop-up containing all of the users within the cell.


Needs Coaching
Future Leader
High Potential
Future Leader
X
Pedro Gonzales
Accounting Manager
View Details
Elaine Grant
Client Success Manager
View Details
Richard Martin
Production Manager
View Details
0
35
Monitor
ofessional

Talent Conference Helicopter View - Grid Functionality

When viewing the Talent Conference Helicopter View within a talent conference task, the system displays the selected metric grid with employee icons that correspond with the selected User Criteria, Date Criteria, Filters, and Color Code. The cells are labeled in accordance with the selected grid, and the employees are displayed within the cell that matches their metric ratings. If the number of users that are plotted in a grid cell exceeds the maximum number of visible employees, the system displays arrows within the cell, allowing the user to scroll up and down through the employees contained within the cell.

The Talent Conference Helicopter View can be configured to display ratings for employees based on a specific succession task or based on their most recent ratings.

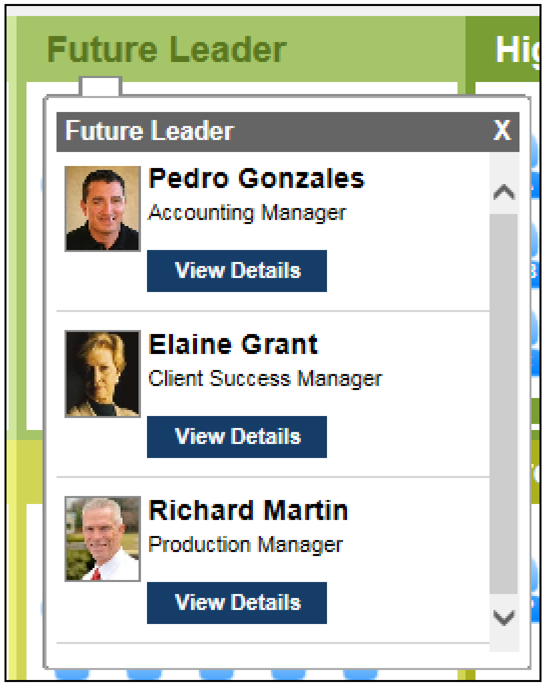
To open a succession planning task, go to **Home > Scheduled Tasks**. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

View All Users in Cell

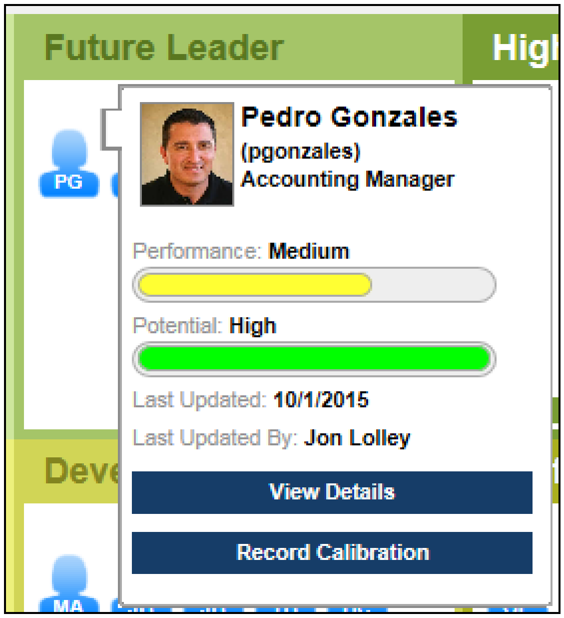
When a user clicks the title of a cell, an employee selector pop-up displays all employees within the cell in alphabetical order by last name. The employee selector displays each employee's photo, name, and position, as well as a **VIEW DETAILS** button. Click the **VIEW DETAILS** button to open a detailed view of the employee. *See* **Talent Conference Helicopter View - Employee Detailed View** *on* page 578 *for additional information.*



View User Details

When a user clicks an employee icon within the grid, an employee selector pop-up displays an overview of the employee, including the employee's photo, name, user name, and position. The pop-up also displays the following information:

- The metric rating titles and values used to plot the employee's grid position. **Note:** *An employee must have a rating for the specified metric for the progress bars to appear. The colors associated with the progress values are configurable for the metric rating scale in SMP Custom Field Administration.*
- The date on which the metric ratings were last updated.
- The user who last updated the employee's succession ratings or grid placements.
- A **VIEW DETAILS** button. Click the **VIEW DETAILS** button to open a detailed view of the employee. *See* **Talent Conference Helicopter View - Employee Detailed View** *on* page 578 *for additional information.*
- A **RECORD CALIBRATION** button. Click the **RECORD CALIBRATION** button to confirm the calibration data and finalize the user's position on the grid. *See* **Talent Conference Helicopter View - Record Calibration** *on* page 575 *for additional information.*



Calibrate or Reposition Employee within Metric Grid

Users are positioned in the Talent Conference Helicopter View's grid based on their succession ratings. Each position in the grid corresponds with a specific combination of succession ratings.

Depending on the succession template's configuration, moderators may be able to calibrate a user's succession ratings by dragging and dropping the user's icon to a different cell within the grid.

See **Talent Conference Helicopter View - Calibrate Ratings** *on* page 574 *for additional information.*

Record Calibration

Depending on the succession template's configuration, moderators may be able to calibrate a user's succession ratings by dragging and dropping the user's icon to a different cell within the grid. However, a calibration is not finalized until the calibration is recorded.

To record a calibration, click the employee's icon within the grid. Within the pop-up, click the **RECORD CALIBRATION** button.

See **Talent Conference Helicopter View - Record Calibration** *on* page 575 *for additional information.*

Reset Grid

If the grid placements are reset, this applies even if an employee has been repositioned and the new position has been saved and recorded. Once the original grid placements are reset, the asterisks are removed. This action cannot be undone.

Click the **RESET GRID** button in the upper-right corner of the grid to revert all employees to their original grid placements. A confirmation pop-up appears.

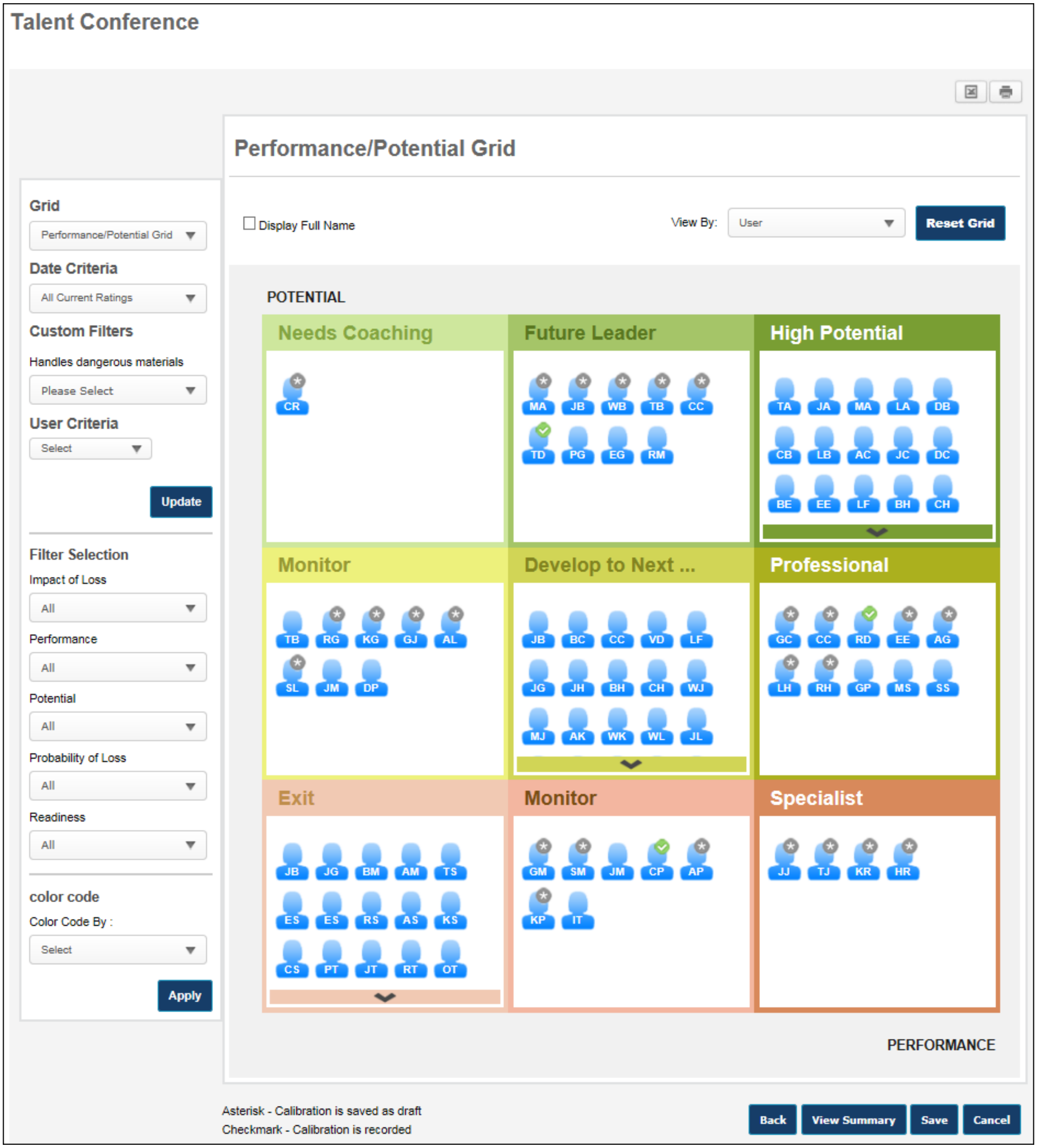
Back, View Summary, Save, or Cancel

Click **BACK** to discard any unsaved calibrations and return to the Talent Conference step of the Talent Conference task. *See* **SMP Talent Conference Task - Talent Conference Step** *on* page 552 *for additional information.*

Click **VIEW SUMMARY** to view a summary of the Talent Conference step. *See* **Talent Conference Helicopter View - Summary** *on* page 584 *for additional information.*

Click **SAVE** to save all employee position adjustments. All grid placements are saved. The asterisks remain to denote that the user has been repositioned and that the new position has not yet been recorded. Calibrations are not finalized until the calibrations are recorded. *See* **Talent Conference Helicopter View - Record Calibration** *on* page 575 *for additional information.*

Click **CANCEL** to discard any unsaved calibrations.


Talent Conference
Performance/Potential Grid
Grid
Performance/Potential Grid
Date Criteria
All Current Ratings
Custom Filters
Handles dangerous materials
Please Select
User Criteria
Select
Update
Filter Selection
Impact of Loss
All
Performance
All
Potential
All
Probability of Loss
All
Readiness
All
color code
Color Code By :
Select
Apply
Display Full Name
View By:
User
Reset Grid
POTENTIAL
Needs Coaching
CR
Future Leader
MA JB WB TB CC
TD PG EG RM
High Potential
TA JA MA LA DB
CB LB AC JC DC
BE EE LF BH CH
Monitor
TB RG KG GJ AL
SL JM DP
Develop to Next ...
JB BC CC VD LF
JG JH BH CH WJ
MJ AK WK WL JL
Professional
GC CC RD EE AG
LH RH GP MS SS
Exit
JB JG BM AM TS
ES ES RS AS KS
CS PT JT RT OT
Monitor
GM SM JM CP AP
KP IT
Specialist
JJ TJ KR HR
PERFORMANCE
Asterisk - Calibration is saved as draft
Checkmark - Calibration is recorded
Back
View Summary
Save
Cancel

Talent Conference Helicopter View - Calibrate Ratings

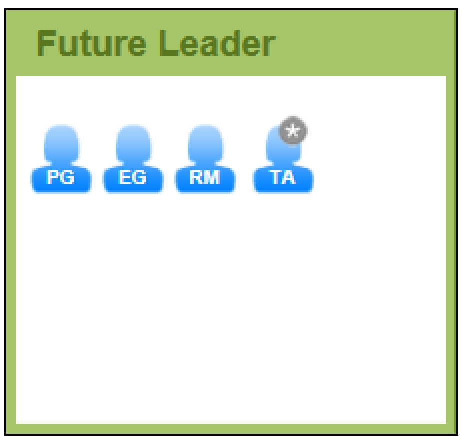
Users are positioned in the Talent Conference Helicopter View's grid based on their succession ratings. Each position in the grid corresponds with a specific combination of succession ratings.

Depending on the succession template's configuration, moderators may be able to calibrate a user's succession ratings by dragging and dropping the user's icon to a different cell within the grid.

- When configuring the succession template, administrators can configure whether calibration is allowed along the x-axis (i.e., horizontally), the y-axis (i.e., vertically), or both.
- If there are any limitations on a moderator's ability to calibrate users, these limitations are displayed at the top of the grid.

After an employee's icon is moved, an asterisk is added to the user's icon to indicate that it has been moved. **Important:** *A calibration is not finalized until the calibration is recorded.*

See **Talent Conference Helicopter View - Record Calibration** *on* page 575 *for additional information.*



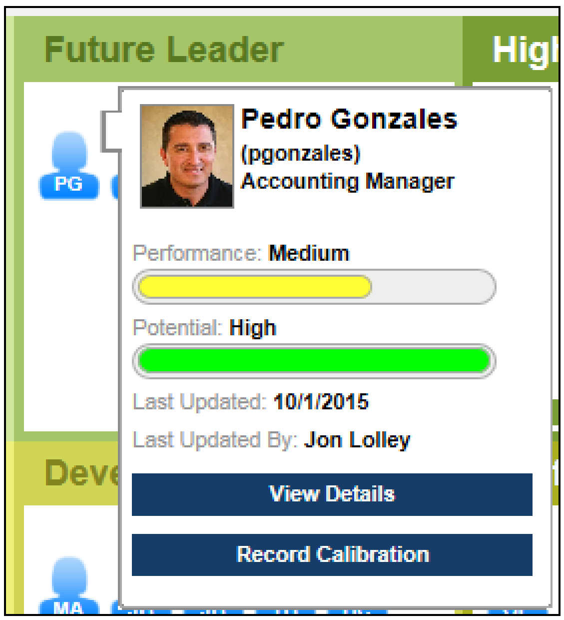
Talent Conference Helicopter View - Record Calibration

Depending on the succession template's configuration, moderators may be able to calibrate a user's succession ratings by dragging and dropping the user's icon to a different cell within the grid. However, a calibration is not finalized until the calibration is recorded.

To record a calibration, click the employee's icon within the grid. Within the pop-up, click the **RECORD CALIBRATION** button.

A user's position can be recorded even if the user's position or ratings were not modified. This could be done to confirm the user's ratings and position.

The **RECORD CALIBRATION** button is not available if the succession template is configured to prevent administrators from calibrating succession ratings.



This opens the Record Calibration pop-up. The following options are available:

Comments - In this field, enter comments to explain the calibration. This is optional. This field accepts HTML.

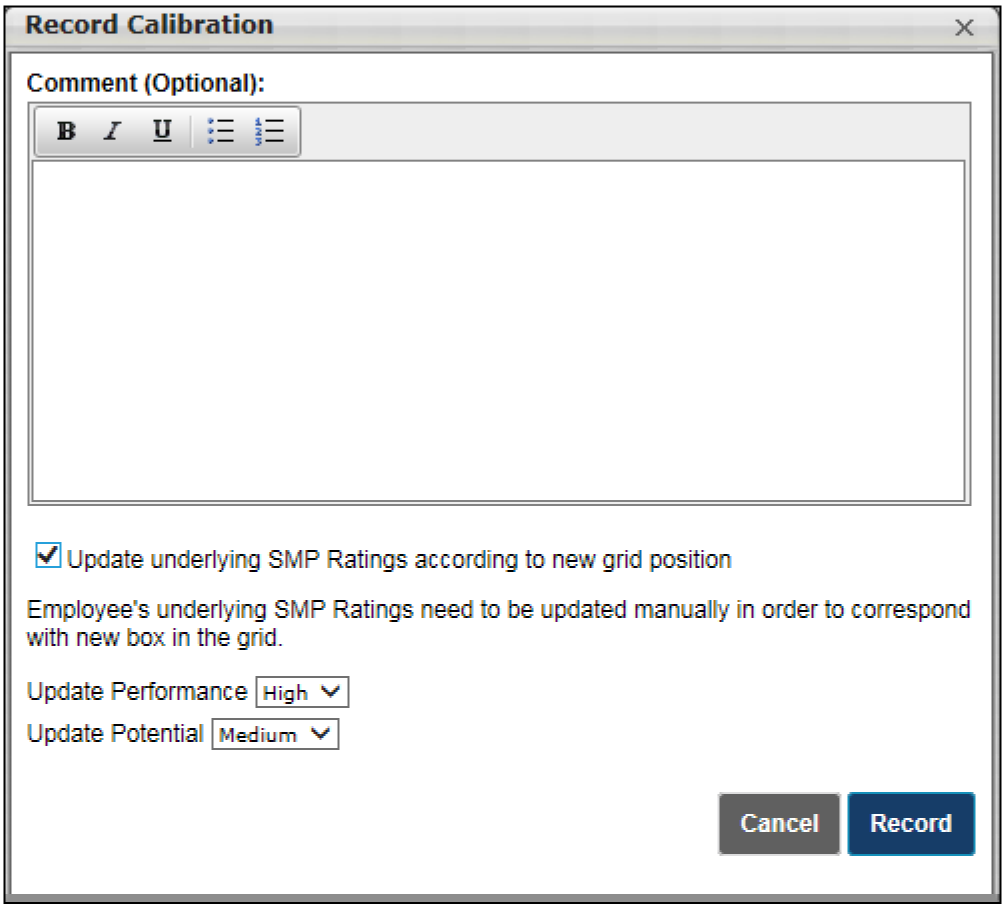
Update underlying SMP Ratings according to new grid position - This option determines whether the user's succession ratings are updated to match their new position on the metric grid.

- When this option is not selected, the user's metric grid position is saved, but the user's succession ratings are not updated.
- When this option is selected, the user's succession ratings are updated to match the ratings that are associated with the user's new position on the metric grid. If the succession template is configured so that calibration is not allowed along an axis, then the ratings associated with that axis are not

updated for the employee. **Note:** *Updated succession ratings are not updated throughout the system until the Sign Off step is completed.*

If the **Update underlying SMP Ratings** option is selected and a range is defined for one or both of the axes of the metric grid, the moderator has the option to manually set the ratings for the axes. If the succession template is configured so that calibration is not allowed along an axis, then the manual calibration option is not available for the axis.

Click **RECORD** to record the calibration and save the comments. Or, click **CANCEL** to cancel the record action.



When a calibration is recorded, a check mark is added to the user's icon. This indicates that the calibration is recorded and it is ready to be committed to the rest of the system when the Sign Off step is completed.


Future Leader
TA
CB
PG
EG
RM

Talent Conference Helicopter View - Employee Detailed View

When viewing the Talent Conference Helicopter View within a talent conference task, the moderator can view the succession details for a user.

To view a detailed view of a user, click a user's icon in the Talent Conference Helicopter View, and then click the **VIEW DETAILS** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

When the page refreshes to display a detailed view of the user, the icon for the selected employee is enlarged to emphasize which employee is being viewed. All other users within the grid are disabled.

Employee Details

On the left side of the grid, the employee's details are displayed. This includes the following information:

- Employee Photo and Name - Click the employee's photo to open the employee's talent profile in a pop-up.
- Position
- Hire Date
- Division
- Location

Employee Ratings

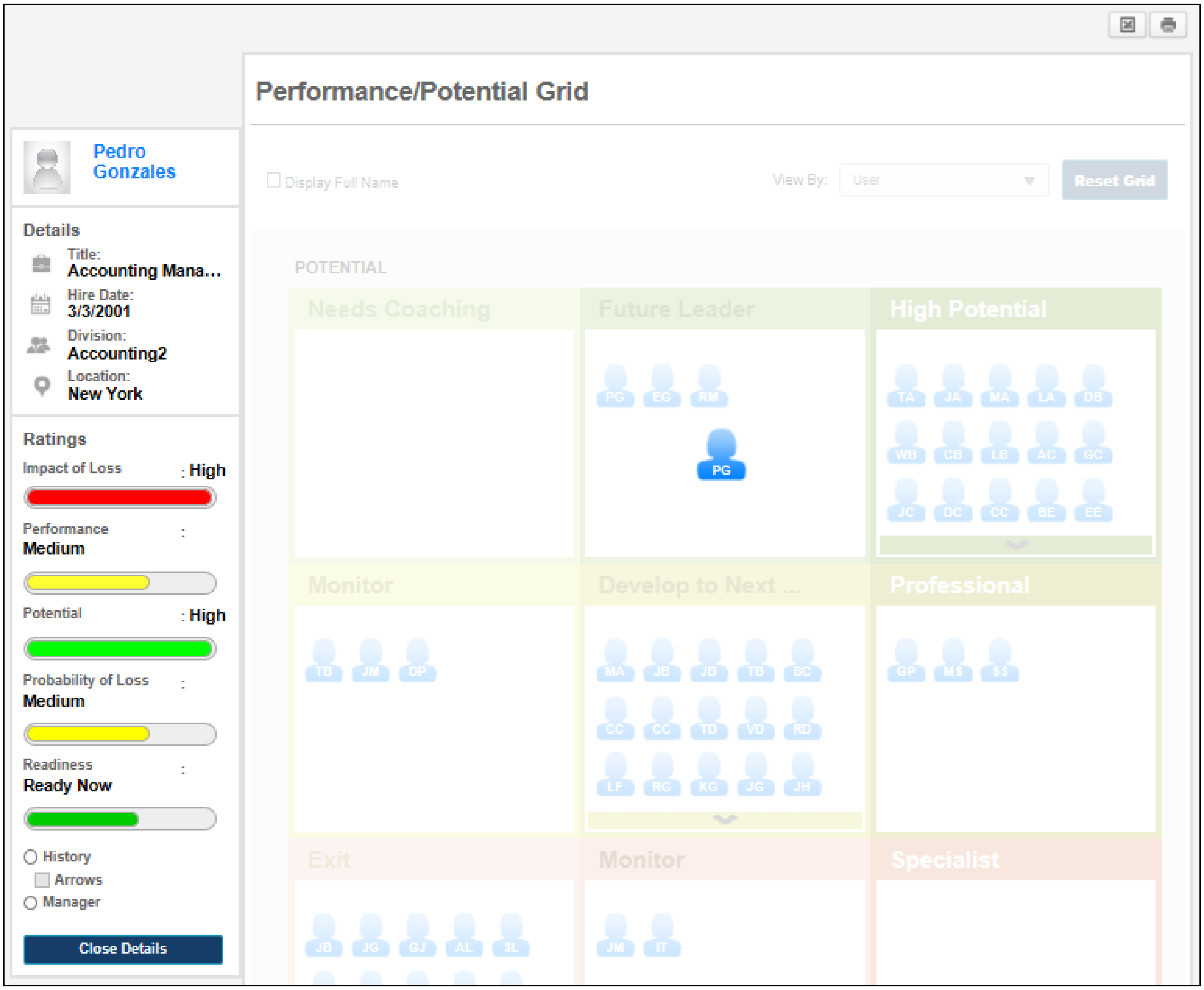
Below the employee details, the employee's ratings are displayed.

- Employee Metric Ratings - This displays the employee's current metric rating values as defined in My Team/Talent Profile Preferences. **Note:** *An employee must have a rating for the specified metric for the progress bars to appear. The colors associated with the progress values are configurable for the metric rating in SMP Custom Field Administration.*
- **History** - This view enhances the grid to display the employee's three most recent grid placements. This option is only available if the employee has at least one previous grid placement. *See the Employee Details - History View section for additional information.*
  - **Arrows** - Select this option to display an arrow on the grid that points from the employee's previous placement to their current placement. If these placements are in the same cell, then this option is not available.

- **Manager** - This view enhances the grid to display the employee's manager. This option is not available if the employee has no manager or if the user accessing the Talent Conference Helicopter View is the employee's manager (i.e., a manager cannot view their own grid placement). *See the Employee Details - Manager View section for additional information.*

Close Details

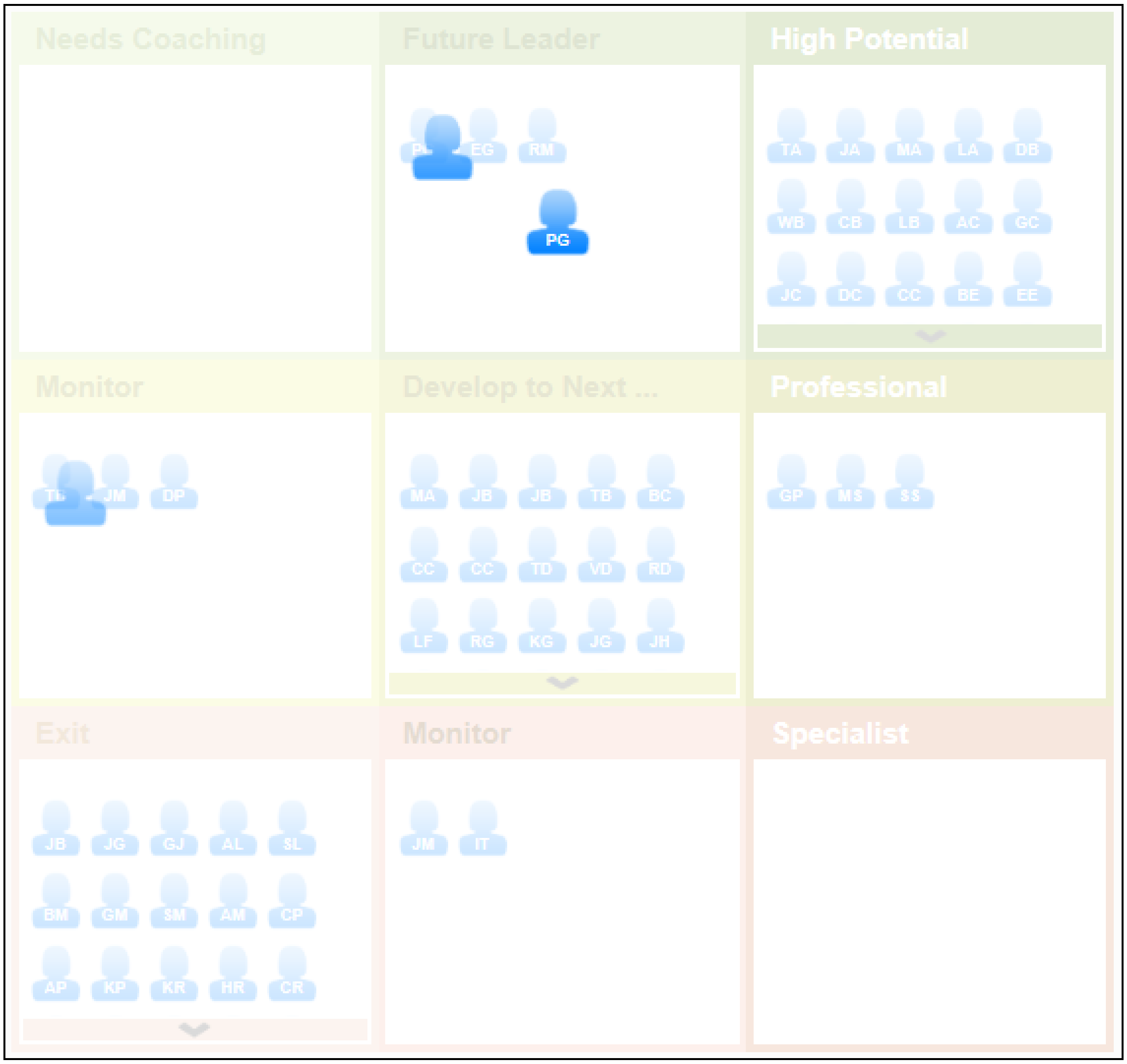
To exit the employee detailed view, click the **CLOSE DETAILS** button. This opens the Talent Conference Helicopter View.



Employee Details - History View

To view the metric grid history of an employee, in the Employee Details view, select the **History** view option. **Note:** *This option is only available if the employee has at least one previous grid placement.*

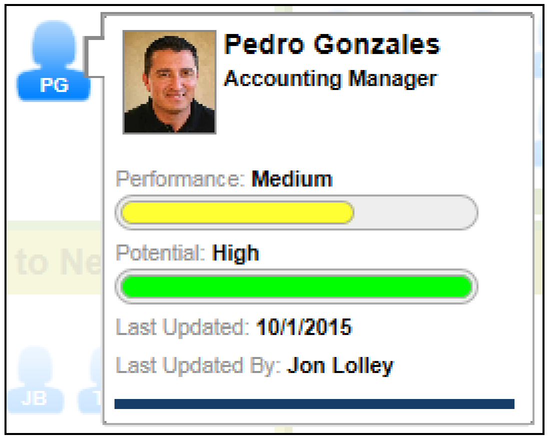
In History View, the employee's three most recent grid placements are displayed. The employee's placement icons are larger in size, and they vary in transparency. The current placement is solid in color, while the most recent placement is semi-transparent, and the oldest placement is the most transparent. If multiple placements exist within the same cell, then multiple employee icons appear in the corresponding cell.



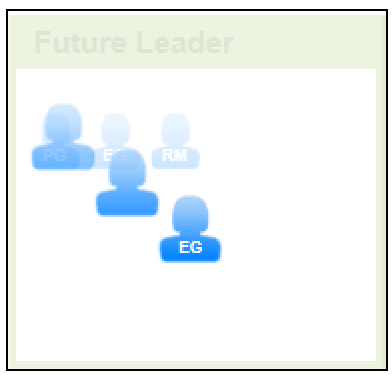
The user can hover the cursor over one of the employee's placement icons to view an information pop-up that displays the following information about the employee:

- Employee photo, name, and title
- Metric rating title and value that correspond to the employee's grid position
- The date on which the metric ratings were last updated that resulted in the corresponding grid placement.

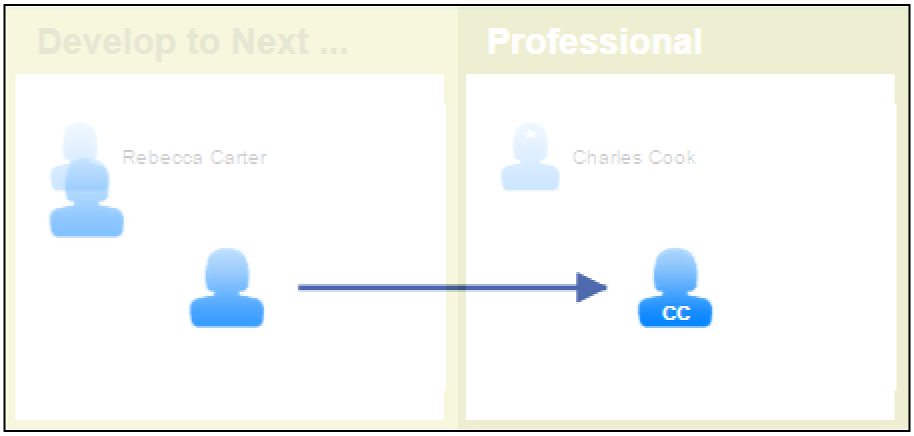
- ○ The user who last updated the employee's succession ratings or grid placements that resulted in the corresponding grid placement. If a user is manually moved via the Talent Conference Helicopter View, then this displays the name of the user who manually moved the employee.



If the selected employee has one or more placements in the same cell, the system displays multiple employee icons in the same cell with the oldest placement appearing in the upper-left corner of the cell.



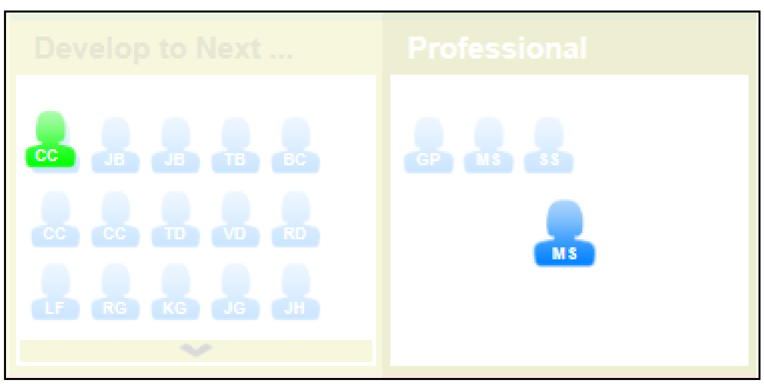
If the **Arrows** option is selected, an arrow displays on the grid and points from the employee's previous placement to their current placement. If these placements are in the same cell, then this option is not available.



Employee Details - Manager View

To view an employee's manager on the metric grid, in the Employee Details view, select the **Manager** view option. **Note:** *This option is not available if the employee has no manager or if the user accessing the Talent Conference Helicopter View is the employee's manager (i.e., a manager cannot view their own grid placement).*

In Manager View, the employee's manager is placed on the grid and the manager is highlighted. The icon of the employee's manager appears in green. The placement of the employee's manager corresponds to the manager's metric ratings.



The user can hover the cursor over the manager's placement icon to view an information pop-up that displays the following information about the manager:

- Employee photo, name, and title
- Metric rating title and value that correspond to the employee's grid position
- The date on which the metric ratings were last updated that resulted in the corresponding grid placement (either through an update to ratings via My Team or an SMP task)
- The user that last updated the employee's succession ratings or grid placements that resulted in the corresponding grid placement. If a user is

manually moved via the Talent Conference Helicopter View, then this displays the name of the user who manually moved the employee.

- A **VIEW DETAILS** button. Click the **VIEW DETAILS** button to open a detailed view of the manager.

Talent Conference Helicopter View - Summary

After calibrating users' succession ratings using the Talent Conference Helicopter View, the moderator can view a basic summary of the Talent Conference.

To open a succession planning task, go to **Home > Scheduled Tasks**. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

Options

The following option is available from the **Options** drop-down menu:

- **Export to Excel** - Select this option to export the Talent Conference Summary page to Excel.

Talent Conference Details

The Talent Conference Details panel displays the following information:

- Location - This displays the location that was specified for the talent conference.
- Date and Time - This displays the date and time at which the Talent Conference Helicopter View was last accessed.
- Employees - This displays which employees were selected to be calibrated in the talent conference.

Participants

The Participants panel displays the following information:

- Moderator - This displays the moderator for the talent conference step. The user's photo, name, and position are displayed. Click the user's photo or image to open their Universal Profile page.
- Reviewer(s) - This displays the reviewers for the talent conference step. Reviewers are displayed in the order in which they were added to the conference. The users' photo, name, and position are displayed. Click the users' photo or image to open their Universal Profile page. If there are additional reviewers that are not displayed, click the **View All** link.
- Co-Planner(s) - This displays the co-planners for the talent conference step. Co-planners are displayed in the order in which they were added to the

conference. The users' photo, name, and position are displayed. Click the users' photo or image to open their Universal Profile page. If there are additional co-planners that are not displayed, click the **View All** link.

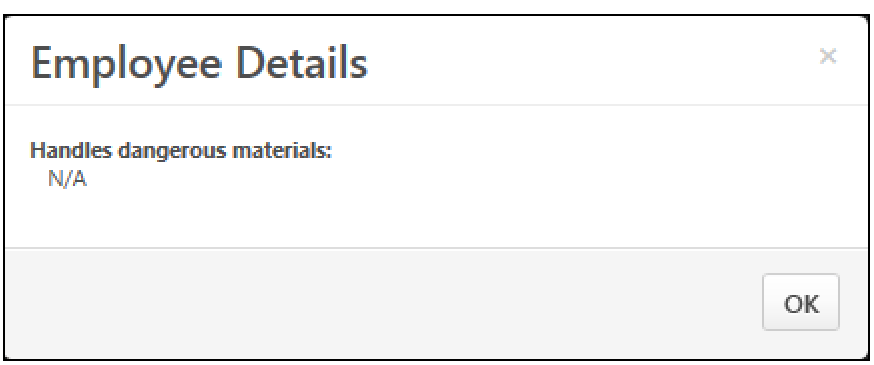
Calibrated Employees

The Calibrated Employees panel displays all of the employees who were calibrated and the details that were calibrated during the talent conference. This section only includes calibrations that were saved and recorded.

This section is only displayed if there are employees who were calibrated and the calibrations were recorded. If this section is not displayed, it may be that the calibrations were not recorded. *See* **Talent Conference Helicopter View - Record Calibration** *on* page 575 *for additional information.*

The following information is displayed for each calibrated employee:

- Photo
- Name
- Position
- Manager
- Ratings - This displays the name of the rating that was modified. By default, only the user's grid position is updated. If the user's underlying succession ratings are also updated, then each succession rating that is updated is also displayed.
- Before Review - This displays the user's rating before the talent conference.
- After Review - This displays the user's rating after the talent conference.
- Comments - If a comment was added when the rating was calibrated, an arrow icon appears to the left of the rating. Click this icon to view the comments.
- Employee Details - To view the Employee Details pop-up for a user, click the drop-down arrow to the right of the user and select **View Details**. This opens a pop-up which displays the user's custom field ratings.



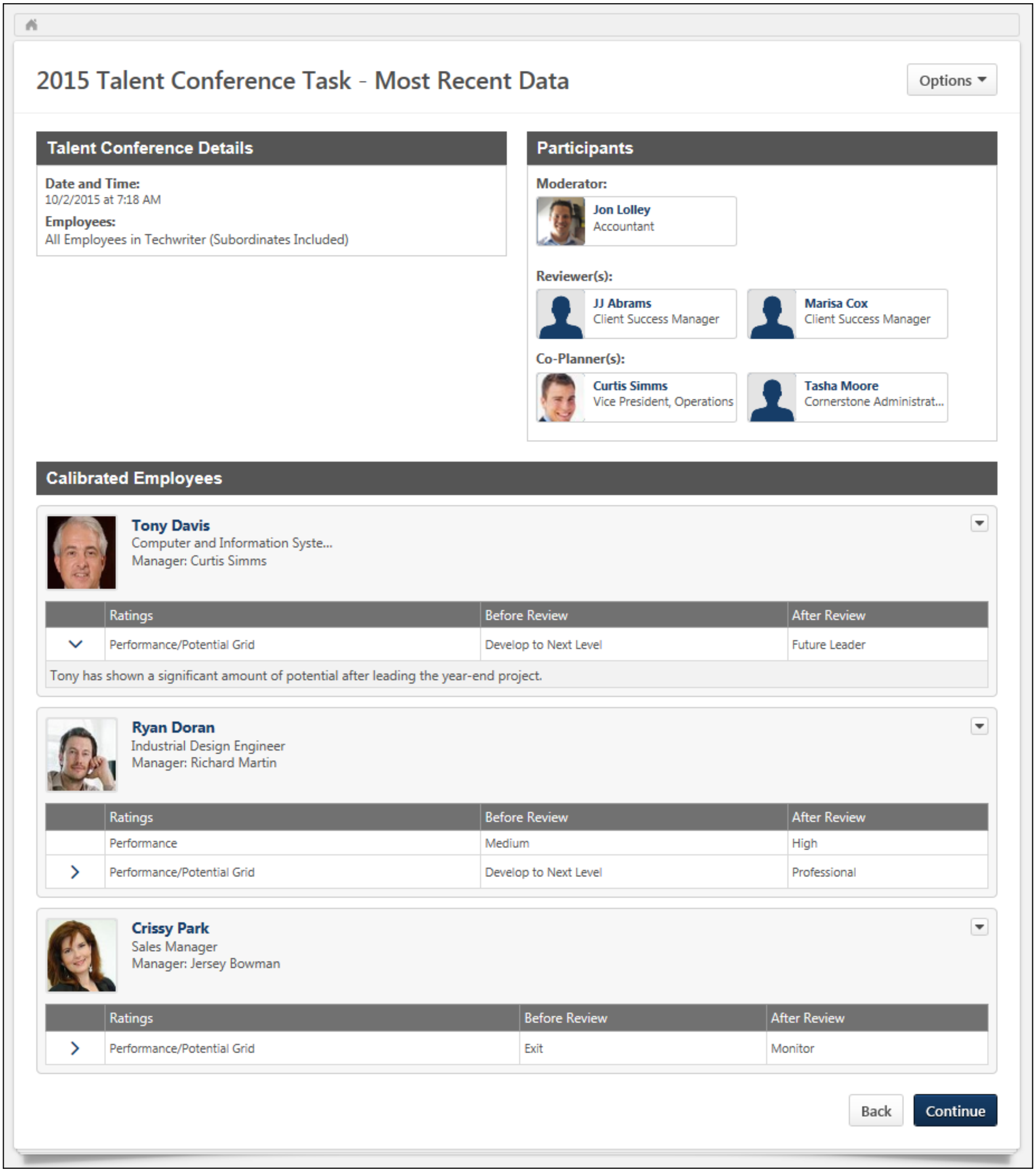
Up to 10 users are displayed in this section. If more than 10 users have been calibrated, then paging options appear at the bottom of the panel.

Back or Continue

Click **BACK** to return to the Talent Conference Helicopter View. *See* **SMP Talent Conference Task - Talent Conference Helicopter View** *on* page 556 *for additional information.*

Click **CONTINUE** to continue to the next step of the talent conference task.

- *See* **SMP Talent Conference Task - Talent Conference Step** *on* page 552 *for additional information.*
- *See* **SMP Talent Conference Task - Sign Off Step** *on* page 588 *for additional information.*


2015 Talent Conference Task - Most Recent Data
Options
Talent Conference Details
Date and Time:
10/2/2015 at 7:18 AM
Employees:
All Employees in Techwriter (Subordinates Included)
Participants
Moderator:
Jon Lolley
Accountant
Reviewer(s):
JJ Abrams
Client Success Manager
Marisa Cox
Client Success Manager
Co-Planner(s):
Curtis Simms
Vice President, Operations
Tasha Moore
Cornerstone Administrat...
Calibrated Employees
Tony Davis
Computer and Information Syste...
Manager: Curtis Simms
Ratings
Before Review
After Review
Performance/Potential Grid
Develop to Next Level
Future Leader
Tony has shown a significant amount of potential after leading the year-end project.
Ryan Doran
Industrial Design Engineer
Manager: Richard Martin
Ratings
Before Review
After Review
Performance
Medium
High
Performance/Potential Grid
Develop to Next Level
Professional
Crissy Park
Sales Manager
Manager: Jersey Bowman
Ratings
Before Review
After Review
Performance/Potential Grid
Exit
Monitor
Back
Continue

SMP Talent Conference Task - Sign Off Step

When completing a Talent Conference task, the Sign Off step enables the moderator to sign off on and submit the talent conference task so that the calibrations that were made can be used throughout the system.

To open a succession planning task, go to **Home > Scheduled Tasks**. Then, click the task name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

Sign Off

When the moderator signs off on a task, they are signing off on all of the ratings included in the talent conference. Because of this, the option to sign off is not available until all talent conference steps within the task are completed.

In order to sign off on the talent conference task, enter your first and last name in the **Moderator** field, and click the **SIGN** button. The submitted signature displays your name in the font selected in My Account > My Preferences. A date stamp is added to indicate the date on which the sign off was provided.

If necessary, you can re-sign prior to submitting the task by clicking reentering your name and clicking the **RE-SIGN** button. This can be done in the event of a typo.

The Sign Off step is considered complete once the step is signed. However, the task is not complete until it is submitted.

Comments

In the **Comments** field, enter comments related to the task. This field is optional.

Evergreen Succession Ratings

Depending on the configuration of the talent conference task, Evergreen Succession Ratings may be updated upon submitting the task. This setting is indicated below the **Comments** field.

- If Evergreen Succession Ratings are updated upon sign-off, then submitting the task immediately updates the Evergreen Succession Ratings for users within the task with the selected ratings.

- If Evergreen Succession Ratings are not updated upon sign-off, then submitting the task does not update the Evergreen Succession Ratings for users within the task with the selected ratings.

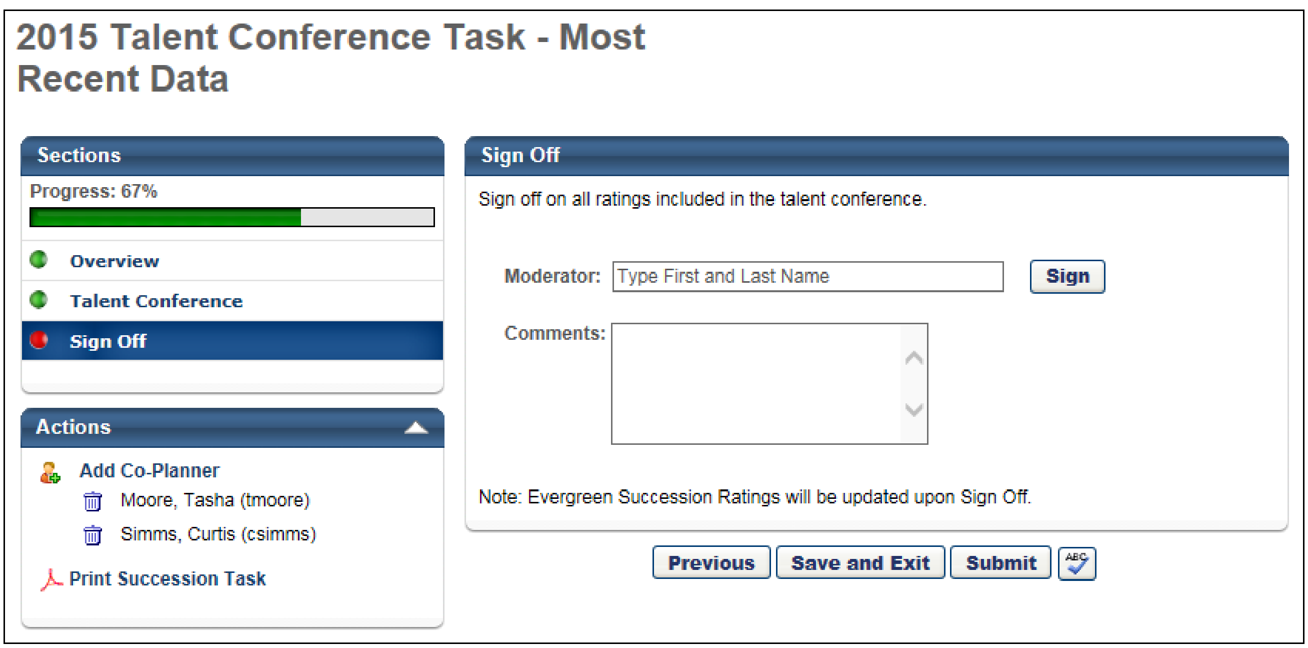
Navigation Buttons

The following navigation buttons are available at the bottom of the page:

- **PREVIOUS** - This button takes users to the previous step of the succession task. This button is not available on the first page of the succession task.
- **SPELL CHECK** - This button performs a spell check on all text boxes on the page. This option is only available in sections where it is applicable.
- **SAVE AND EXIT** - This button saves the assessor's progress and exits the SMP task.
- **SAVE AND CONTINUE** - This button saves the assessor's progress and proceeds to the next step of the SMP task. This button is not available on the final page of the SMP task.
- **SUBMIT** - This button submits the SMP task. This button is only available when all sections of the task are complete.

When in read-only mode, the available buttons are **PREVIOUS**, **EXIT**, and **NEXT**.

If configured, the Talent Conference Summary Sign Off email is triggered when the sign off is completed and the task is submitted.



Email Triggers

Email Trigger - Talent Conference Scheduling Notification

With this enhancement, a new Talent Conference Scheduling Notification email trigger is available in the Succession Management email action type.

This email is triggered when a talent conference is scheduled on the Talent Conference step of a Talent Conference succession task. This email is intended to inform moderators or reviewers of the talent conference location, date, and time. This email trigger also has a calendar meeting request file attached, which can be saved to the recipient's calendar tool. This email can be sent as a notification or a reminder to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task.

The following tags are available for this email trigger:

- ACTION.DATE
- RECIPIENT.FIRST.NAME
- RECIPIENT.LAST.NAME
- RECIPIENT.PHONE
- RECIPIENT.POSITION
- RECIPIENT.DIVISION
- COMMENTS.TO.REVIEWER - This displays any comments that were entered by the moderator for the reviewer on the Talent Conference step of the task.
- CONFERENCE.TIME.ZONE - This displays the time zone in which the talent conference is scheduled.
- CONFERENCE.START.TIME - This displays the start time of the talent conference.
- CONFERENCE.END.TIME - This displays the end time of the talent conference.
- CONFERENCE.DATE - This displays the date on which the talent conference is scheduled.
- CONFERENCE.LOCATION.ADDRESS - This displays the address that is associated with the location of the talent conference.
- MODERATOR.FIRST.NAME - This displays the first name of the talent conference moderator.
- MODERATOR.LAST.NAME - This displays the last name of the talent conference moderator.
- MODERATOR.POSITION - This displays the position of the talent conference moderator.
- TALENT.CONFERENCE.NAME - This displays the name of the talent conference task.
- TALENT.CONFERENCE.STEP.NAME - This displays the name of the talent conference task step.

Email Trigger - Talent Conference Re-Scheduled

With this enhancement, a new Talent Conference Re-Scheduled email trigger is available in the Succession Management email action type.

This email is triggered when a talent conference location, date, or time is modified and the talent conference is saved. This email is intended to inform moderators and reviewers of the updated location, date, or time of the talent conference. This email trigger also has a calendar meeting request file attached, which can be saved to the recipient's calendar tool. This email can be sent as a notification to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task.

The following tags are available for this email trigger:

- ACTION.DATE
- RECIPIENT.FIRST.NAME
- RECIPIENT.LAST.NAME
- RECIPIENT.PHONE
- RECIPIENT.POSITION
- COMMENTS.TO.REVIEWER - This displays any comments that were entered by the moderator for the reviewer on the Talent Conference step of the task.
- ORIGINAL.CONFERENCE.TIME.ZONE - This displays the original time zone in which the talent conference was scheduled.
- ORIGINAL.CONFERENCE.START.TIME - This displays the original start time of the talent conference.
- ORIGINAL.CONFERENCE.END.TIME - This displays the original end time of the talent conference.
- ORIGINAL.CONFERENCE.DATE - This displays the original date on which the talent conference was scheduled.
- ORIGINAL.CONFERENCE.LOCATION - This displays the original address that was associated with the location of the talent conference.
- UPDATED.CONFERENCE.TIME.ZONE - This displays the updated time zone in which the talent conference is scheduled.
- UPDATED.CONFERENCE.START.TIME - This displays the updated start time of the talent conference.
- UPDATED.CONFERENCE.END.TIME - This displays the updated end time of the talent conference.
- UPDATED.CONFERENCE.DATE - This displays the updated date on which the talent conference is scheduled.
- UPDATED.CONFERENCE.LOCATION - This displays the updated address that is associated with the location of the talent conference.
- MODERATOR.FIRST.NAME - This displays the first name of the talent conference moderator.

- MODERATOR.LAST.NAME - This displays the last name of the talent conference moderator.
- MODERATOR.POSITION - This displays the position of the talent conference moderator.
- TALENT.CONFERENCE.NAME - This displays the name of the talent conference task.
- TALENT.CONFERENCE.STEP.NAME - This displays the name of the talent conference task step.

Email Trigger - Talent Conference Summary Sign Off

With this enhancement, a new Talent Conference Summary Sign Off email trigger is available in the Succession Management email action type.

This email is triggered when a talent conference is signed off. This email trigger enables moderators to notify reviewers that the Sign Off step is completed. This email can be sent as a notification to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task.

The following tags are available for this email trigger:

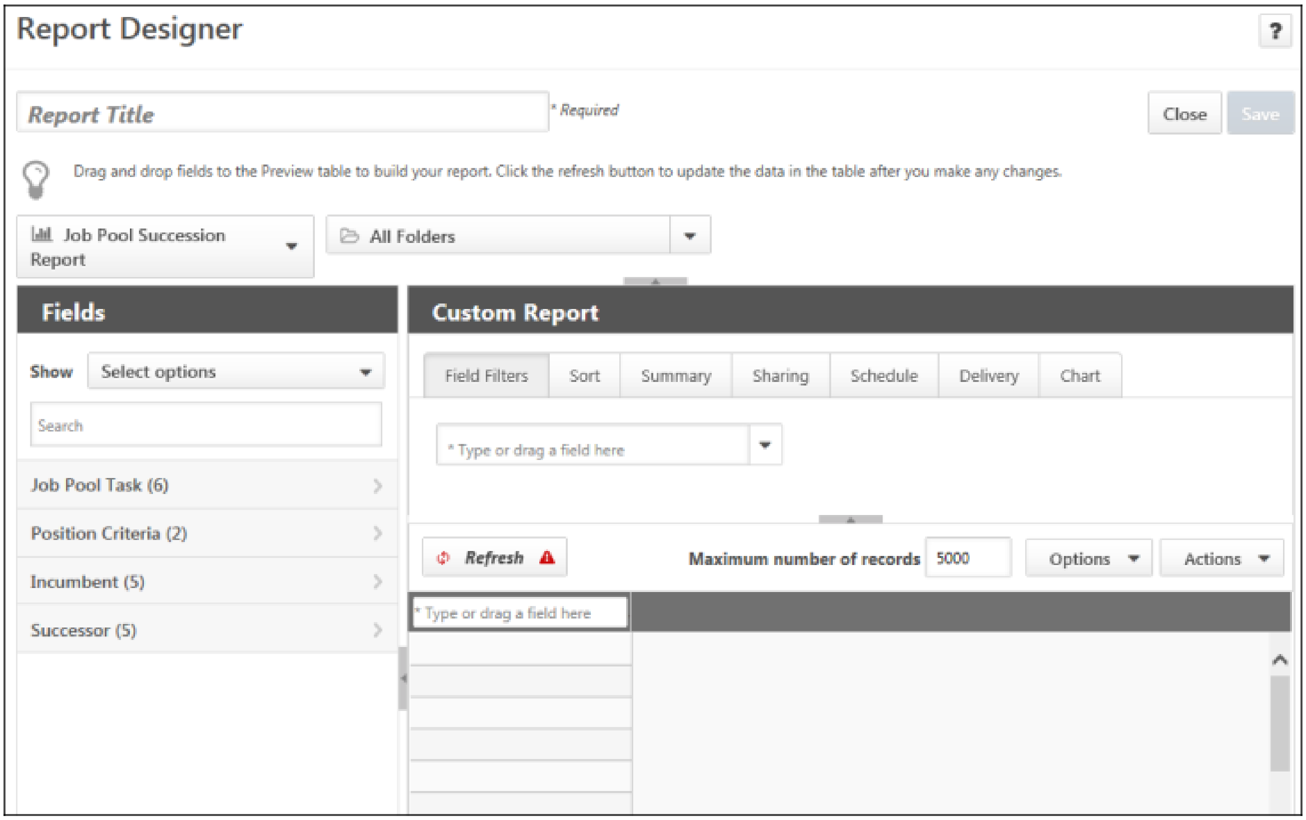
- ACTION.DATE
- RECIPIENT.FIRST.NAME
- RECIPIENT.LAST.NAME
- RECIPIENT.PHONE
- RECIPIENT.POSITION
- SIGN.OFF.DATE - This displays the date on which the moderator completed the sign off step of the talent conference task.
- MODERATOR.FIRST.NAME - This displays the first name of the talent conference moderator.
- MODERATOR.LAST.NAME - This displays the last name of the talent conference moderator.
- MODERATOR.POSITION - This displays the position of the talent conference moderator.
- TALENT.CONFERENCE.TASK.NAME - This displays the name of the talent conference task.

Job Pool Succession Custom Report

The Job Pool Succession Custom Report is a new custom report that allows users to report on job pool task data.

To create a Job Pool Succession Custom Report, go to **Reports > Custom Reports**. Then, click **Job Pool Succession Report** in the **New** drop-down.

Note: *The succession data for the user who is running the report is not visible for the user.*



Permissions

With this enhancement, constraints are added to the *Custom Succession Report - Create* and *Custom Succession Report - View* permissions. The constraints apply to the job pool task creator.

- Restrict to OURestrict to User's OURestrict to User Self and SubordinatesRestrict to User's Subordinates

The following existing permissions apply to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Custom Succession Report - Create	Grants ability to create and edit Custom Succession Management (SMP) Reports and Custom Job Pool Succession Reports.	Reports - Analytics

Custom Succession Report - View	Grants ability to view results of Custom Succession Management (SMP) Reports and Custom Job Pool Succession Reports created by self or shared by others.	Reports - Analytics

Available Fields

The Job Pool Succession Custom Report includes the following field sections:

- Job Pool Task
- Position Criteria
- Incumbent
- Successor

Job Pool Task Section

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Task Created by (ID)	User ID associated with the user creating a job pool task.	Text
Task Created by (Name)	Name of the user associated with creating a job pool task.	Text
Task Creation Date	Date when the job pool task was created.	Date
Task Last Modified	Displays the date when a Job Pool was last modified.	Date
Task Name	Displays the name of the job pool task.	Text
Task Status	Displays the current status of the job pool task.	Text

Position Criteria

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Position Name	Displays the positions included as part of the report.	Text
Position Custom Fields	Custom fields that associated with selected position for selected task and available to the user.	Various

Incumbent

The Incumbent section displays standard and custom User fields that are currently available in the User Section in custom Succession reports and associated with the current incumbent(s) for the position. The fields display as ([Standard/Custom User Field Name] - Incumbent).

Successor

The Successor section displays the standard and custom User fields that are currently available in the User Section in custom Succession reports and associated with the current successors for the position. The fields display as ([Standard/Custom User Field Name] - Successor).