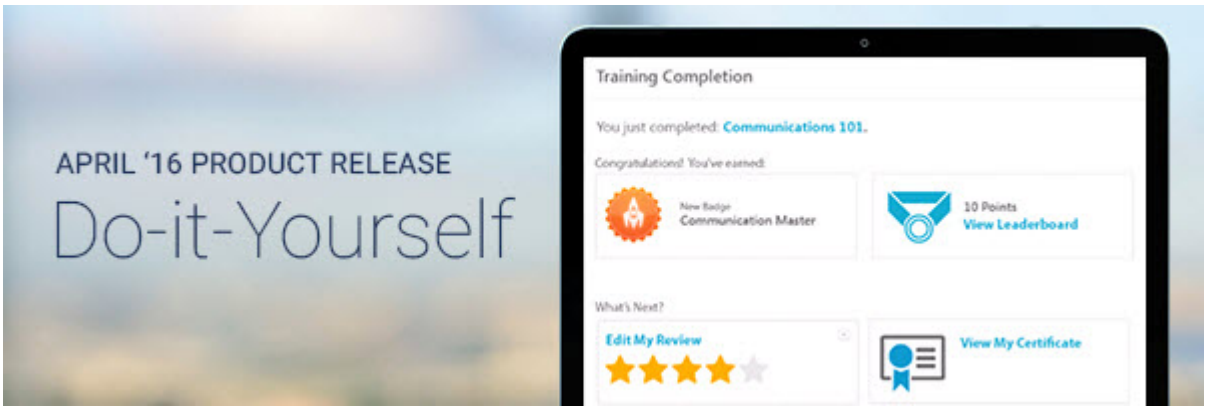

Cornerstone April 2016 Release Notes

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What's New for April 2016

What's New for April '16

The following new features and enhancements are available for the April 2016 release as of 10 April 2016:

Compensation Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Employee Salary Management Redesign	Employee Salary Management Redesign		With this enhancement, the Employee Salary Management page is redesigned to improve the look and feel of the page. In addition, employee salary data storage is optimized to enable the system to handle more robust salary storage requirements for future salary management enhancements.
Custom Reports - Additional Compensation Fields	Custom Report - Additional Compensation Fields		New Compensation fields are added to Compensation and Multi-Module Custom Reports.
Custom Reports - Support Currency on Currency Tab in Summarized Reports	Custom Report - Support Currency on Currency Tab in Summarized Reports		With this enhancement, when running a Compensation Custom Report, the currency option selected on the Currency tab will be reflected in the report output of summarized reports. Prior to this enhancement, the currency option selected on the Currency tab was not reflected in summarized report outputs.

Connect Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Search within Communities	Search within Communities		With this enhancement, users can search for postings from within a community or topic. The search returns all available postings within the current community or topic that match the user's search criteria.
Tags in Communities	Tags in Communities		With this enhancement, users are able to create custom tags and add them to postings in Connect communities. In addition, users may be able to search for postings by tag and filter postings by tag. When users can search for postings by tag, they can also click a tag that is associated with a posting to initiate a search for other postings with the same tag. This enhancement improves a user's ability to search for and discover content within Connect.

Core Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Data Load Wizard - Duplicate User Prevention	Data Load Wizard - Duplicate User Prevention	See Notes	When an organization using Link loads new users using the Data Load Wizard, the system can be configured to determine whether the new users are similar to existing user records. This is done in order to prevent the same user from being added

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			to the system more than once.
Data Load Wizard - Historical Effective Dating for User Data	Data Load Wizard - Historical Effective Dating for User Data	See Notes	With this enhancement, when loading users into the system using the Data Load Wizard, an As of Date can now be associated with a user record. By setting an effective date for a user record, administrators can set changes that are effective in the past and in the future via the Data Load Wizard.
Headcount Planning		Yes	Headcount Planning enables efficient, enterprise-wide collaboration to identify the number and mix of employees that will be needed to achieve the organization's business objectives in the future. Headcount Planning controls access to sensitive information, includes built-in versioning and error tracking, and provides a seamless approval and consolidation workflow. The interface is designed specifically for the headcount planning process, rather than having to use a generalized spreadsheet.
Insights Career Mobility	Career Mobility	Yes	The Career Mobility Insight empowers managers to create data driven career paths and development plans for individuals to realize their potential. Organizations will gain insight on internal career paths and the actions that drove historically successful successors along their paths.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			Furthermore, this will prescribe users with development plan action items to help new successors mobilize in their career paths.
Language Pack Enhancements - Dutch, Czech, Slovakia	Language Pack Enhancements - Dutch, Czech, Slovakia		With the April 2016 release, Cornerstone is revising the translations for the Dutch, Czech, and Slovakian language packs.
Link - Duplicate User Prevention	Link - Duplicate User Prevention	See Notes	With this enhancement, when an organization using Link creates new users, the system can be configured to evaluate whether the new users are similar to existing user records. If similar records do not exist, the new users will be created normally. However, if similar records do exist, the record creation is prevented.
Link - Historical Effective Dating for User Data	Link - Historical Effective Dating for User Data	See Notes	With this enhancement, organizations using Link can now backdate user record data to before the user record was created. The system now supports historical effective dates as long as the date is on or after January 1, 1901. This enhancement applies to modifications that are made via the User Record or the Data Load Wizard. This enhancement enables organizations to more effectively use Cornerstone as their system of employee records.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Link - Manager Self-Service	Link - Manager Self-Service	See Notes	With this enhancement, Cornerstone Link enables managers to utilize forms to update employee information for their direct reports. In addition, if configured, form data can be submitted by a user within a specified set of criteria for another user.
Online Help Ratings and Feedback	Online Help Ratings and Feedback		With this enhancement, administrators now have the ability to rate topics and provide descriptive feedback within Online Help. The ratings and feedback will be used by Cornerstone to identify topics for improvement in Online Help.
Organizational Unit Fields in Forms			With this enhancement, organizational unit (OU) fields can now be added to forms so that OUs can be updated using forms.
Page Caching Security Enhancements	Page Caching Security Enhancements		With this enhancement, when a user logs out of the system, certain system pages that potentially contain sensitive information pertaining to users and security are automatically cleared from a browser's cache. This prevents the information on these pages from being retrieved by unauthorized users.
REST Service Authentication via SP Initiated SSO	Web Services - REST Service Authentication via SP Initiated SSO	See Notes	With this enhancement, organizations can now use SP-initiated single sign on (SSO) to authenticate their REST service users.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Universal Profile My Team Hierarchy Navigation	Universal Profile My Team Hierarchy Navigation		With this enhancement, managers can now navigate through their direct and indirect report hierarchy using the My Team drop-down within Universal Profile. In addition, approvers and custom employee relationships can quickly navigate through their dotted line reports using the My Team drop-down. If the user serves in multiple roles that are available within the drop-down, then the user can select a specific role and view the reports that are associated with that role.
Custom Reports - User Types and Statuses			With this enhancement, user type and status fields are now available for all custom reports that have a User section. A new User Status Information section is added to include these fields.
Standard Reports - Support for OU Localization	Standard Reports - Support for Organizational Unit (OU) Localization		With this enhancement, standard reports that contain organizational units (OU) will be updated to display the localized value for the OU. If there is no localized value for the OU name, then the default value displays for the OU name.
View People		Yes	View People is a new, interactive visualization suite that helps managers and executives use employee attributes, such as performance and succession metrics, to identify high-value assets while

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			on the go. View People is available from tablets and desktop devices to provide immediate access to key employee data. View People removes the complexity and time-consuming process of searching for an employee or candidate. You no longer need to run multiple reports or have specialized knowledge about the system. View People enables you to search across your organizational units (OU) and module data by simply adding and removing filters. The results of a search can be saved or shared or can be used to trigger additional actions, like adding an employee to a list or talent pool.

Edge Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Edge Integrate			Cornerstone Edge Integrate enables organizations to quickly and easily integrate their Cornerstone system with other workforce systems. This includes recruiting tools, such as Broadbean and Multiposting, learning tools, such as WebEx and GoToMeeting, and social

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			tools, such as Facebook and Twitter.

Learning Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Course Recommendations Exclusion Flag	Course Recommendations Exclusion Flag		With this enhancement, the General tab of the Course Catalog now has an additional option that enables administrators to exclude a learning object (LO) from being recommended to users. Although the ability to provide course recommendations is not widely available, this option enables administrators to proactively exclude certain LOs from course recommendations.
Data Load Wizard - Support Audit Trail	Data Load Wizard - Support Audit Trail for Events, Sessions and Transcript Loads		With this enhancement, an audit trail is available when an Admin loads events, sessions or transcripts through the Data Load Wizard.
Enhanced Certification Transcript Web Service (SOAP)	Web Services - Learning	See Notes	With this enhancement, the following fields are now included in the Certification Transcript web service response: o Certification Status -

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			This returns the user's status for the certification. o Earned Credits (within Section Item) - This returns the user's earned credits for the certification section.
Enhanced LO - Complete Web Service (SOAP)	Web Services - Learning	See Notes	With this enhancement, the following field is now included in the LO - Complete web service request for online courses and tests: o Score - This field is used to determine a pass or fail status for the learning object (LO).
Get Details Web Service (REST)	Web Services - Learning	See Notes	With this enhancement, a new Get Details REST web service is now available. This web service provides standard and custom field data for a learning object (LO) via REST Web Services.
Global Search LO Web Service (REST)	Web Services - Learning	See Notes	With this enhancement, a new Global Search (LO) REST web service is now available. This web service provides a list of training courses based on specific parameters via REST Web Services.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Google Calendar Integration	Google Calendar Integration		With this enhancement, the system now also supports integration with Google Calendar. Administrators can configure certain email triggers to include meeting invitations or calendar attachments. When a user using Gmail receive a meeting invitations from the system, their Google Calendar is automatically updated with the appropriate meeting information.
Increased Video Size			With this enhancement, videos viewed on the Transcript or LO Detailed page are displayed in a large frame.
Learning Rewards & Recognition	Learning Rewards & Recognition		With this enhancement, badges and points can now be awarded automatically when a user completes training. Also, the points that are associated with a badge are now utilized throughout the system. For example, a manager can view a subordinate's total number of badges and points within the Universal Profile Snapshot, and a Leaderboard page displays employees with

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			the most points across the user's organizational units (OUs).
Offline Player Enhancements	Offline Player Enhancements	Yes	With this enhancement, the new version of Offline Player is more engaging and aligned with Cornerstone's new interface. Organizations can brand the Offline Player application with their logo and color theme. The offline transcript will look similar to the online transcript. Learning progress will be synced automatically.
Tin Can (xAPI) Support - Learning Record Store (LRS)	Tin Can (xAPI) Support - Learning Record Store (LRS)	Yes	With this enhancement, the system is able to record external Tin Can activities on Cornerstone's Learning Record Store (LRS). External Tin Can activities include but are not limited to mobile apps, offline learning, web application, collaborative learning, games, videos, etc. When an external activity needs to be recorded, the application sends secure statements to the LRS to record all statements.
Training Completion	Training Completion		With this enhancement, a Training Completion page can now be enabled for training. A Training

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			Completion page is a page that is available to a user when they complete the training. Depending on the configuration of the training and the portal, the Training Completion page may display any points or badges that were awarded, the opportunity to rate and review the training, and the option to view their certificate of completion.
Training Completion Signature at LO Level	Training Completion Signature at Learning Object (LO) Level		With this enhancement, administrators now configure whether a training completion electronic signature (e-signature) is required for specific learning objects (LOs). In addition, a new Default Training Completion Signature Preferences page is now available. This page enables administrators to configure the default setting for requiring training completion e-signature by LO type, which is set for a LO when the LO is created. Once the LO is created, administrators can modify this setting at the LO level via Course Catalog.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Training Plan Dynamic Update	Training Plan Dynamic Update		With this enhancement, when a training plan is configured with managers as Plan Contributors planning for their subordinates and a new manager is identified for a user on their user record, then an automatic workflow moves the training needs to the user's new manager who is acting as a Plan Contributor. Any training needs that have been identified for a subordinate within a training plan will remain associated with the subordinate even if the subordinate is moved to a new plan contributor.
Transcript and Task Web Service (REST)	Web Services - Learning	See Notes	With this enhancement, a new Transcript and Task REST web service is now available. This web service provides transcript and task data for users via REST Web Services. The service can return all transcript information for a user or only information for a specific learning object (LO).
Transcript Search Web Service (REST)	Web Services - Learning	See Notes	With this enhancement, a new Transcript Search REST web service is now available. This web

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			service provides transcript data for users based on a provided transcript status within a specified time period via REST Web Services.
Custom Reports - LO Availability and Added Fields	Custom Report - Additional Learning Fields		With this enhancement, Learning fields are added to multiple sections of custom reports.

Mobile Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Apply with Mobile - Pre-screening Questions	Apply with Mobile - Pre-screening Questions and Upload Documents		With this enhancement, pre-screening questions can now be completed using the mobile application, which enables more applicants to complete applications using the mobile application.
Apply with Mobile - Upload Document	Apply with Mobile - Pre-screening Questions and Upload Documents		With this enhancement, applicants can now upload documents to their application, such as resumes and cover letters. Users can upload documents using Box, Dropbox, Google Drive, or iCloud. Applicants with a Windows device can upload documents using OneDrive.

Performance Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Custom Employee Relationships in Performance	Custom Employee Relationships in Performance		Within the system, administrators can define custom employee relationships such as Dotted Line Manager or Secondary Manager. These custom relationships can be used in various areas of the system, such as performance reviews, compensation, and custom approval workflows for Learning.
Goals Redesign Enhancements	Goals Redesign Enhancements		With this enhancement, the following enhancements have been made to the redesigned Goals functionality: o SMART Goal Wizard - This wizard is now available for organizations using the redesigned Goals functionality. The appearance of the wizard is improved, but the functionality is not changed. o Total Goal Weight - Administrators can now configure Goal Preferences so that the total weight for all of a user's goals cannot exceed 100% for the current goal period. o View Details for Manager Goals and Alignable Goals - Administrators can now prevent users from viewing goal Progress, Comments, and Attachments of manager

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			goals and goals that are available for alignment. o Universal Profile: Actions - When a user manages a goal from the Universal Profile: Actions page, the user is able to manage the goal from within the Actions space. Previously, users were directed to the Snapshot space, which was an issue for organizations that did not have Snapshot enabled. o Copy Details when Aligning - When aligning with another goal, users now have the option to copy the details of the goal to their new goal. o Goal Status Drop-down - If the Progress field is disabled and a goal has no tasks or targets, users can now update the goal status using a drop-down menu on the Manage Goals page.
Goals Redesign Auto-Upgrade	Goals Redesign Auto-Upgrade		With this enhancement, all portals using Goals are automatically upgraded with the new Goals redesign.
Goals Team View - Excel Export	Goals Team View - Excel Export		With this enhancement, administrators now have the option to export all of their team's goals to an Excel (Unicode .csv) file for the time period that is being viewed.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Performance Features in Action Items	Performance Features in Action Items		With this enhancement, a user can complete Goal, Development Plan, Peer, and Training Form approvals from the Request tab within Universal Profile: Actions. Also, a user can view Observation Checklist and Training Form tasks in the Universal Profile: Actions page. This allows the user to more efficiently complete tasks and provide approvals.
Performance Rewards and Recognition - Leaderboard	Performance Rewards and Recognition - Leaderboard		As part of the Learning Reward and Recognition project, users are now able to track their Feedback and Learning badges via a new My Badges page and engage in competition on a new Leaderboard page. Rewards and Recognition gives employees the opportunity to engage in competition and for the organization to motivate their employees to give and receive feedback, learn, and develop through non-competitive awards. Points need to be associated with Feedback Badges for users to be tracked on the Leaderboard.
Structured Feedback	Structured Feedback	Yes	With this enhancement, users can add yes/no questions or rating questions to feedback requests. This allows users to receive clear, quick responses in a more seamless manner.
Update Goal Progress from	Update Goal Progress from		With this enhancement, Goal Rating performance review

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Performance Review	Performance Review		sections can be configured to allow reviewers to access the Manage Goals page directly from the Goal Rating section. This enables the reviewer to quickly update the goal progress without exiting the performance review. The updated goal progress is reflected in the performance review.
Custom Reports - Added Fields in Performance	Custom Report - Additional Performance Fields		With this enhancement, fields are added to the Competency and Goals sections for custom reports.
Custom Reports - Performance Review Sign-off Section	Custom Report - Performance Review Sign-off Section		With this enhancement, a new Performance Review Sign-off section is now available when creating a Performance Review custom report. This section enables administrators to create custom reports that include information about the Sign-off section. This includes the decline to sign functionality.

Recruiting Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Broadbean External Sourcing		Yes	The Broadbean External Sourcing integration enables organizations to source applicants from external job boards in Broadbean. The

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			applicants can be added to talent pools and invited to apply to the job.
Broadbean Integration - Multiple Language Support for Job Postings -	Broadbean Integration - Multiple Language Support for Job Postings		With this enhancement, the following updates are made to the External Postings tab when configuring job requisition postings to Broadbean: o **Language Drop-Down** - When configuring Broadbean job postings, recruiters can now select which language to post the job in, based on the languages into which the job requisition has been translated. A language drop-down has been added to the Broadbean posting step to allow recruiters to choose the language. The localized job requisition will render correctly via Broadbean posting. o **Posting DateColumn** - A Posting Date column is added to the Job Boards section. This column displays the date on which the job was posted to Broadbean. o **Language Column** - A Language column is added to the Job Boards section. This column displays the language in which the job was posted to Broadbean.
Data Load		Yes	With this enhancement, the

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Wizard - Support for Keyword and Cost Center OU			Data Load Wizard supports two new fields through the Job Requisition and Job Requisition Template data loads, Keyword and Cost Center OU.
Enhanced Job Requisition Web Service (REST)	Web Services - Job Requisition REST Service	See Notes	With this enhancement, additional fields are now included in the Job Requisition web service response.
FADV Enhancements and Migrate FADV from IUP to Edge Overview			With this enhancement, First Advantage (FADV) integration is migrated to the Edge Marketplace. This allows organizations to purchase the FADV integration directly from Edge. Prior to this enhancement, FADV required a custom integration process that was managed through Global Product Support. After the initial set-up, clients will be able to make configuration changes to the integration directly within the Integration Center, as opposed to using GPS. In addition, permissions are also being added to enable organizations to restrict and limit user access to initiating a background check, viewing background check results, and viewing background check details.
Google Analytics in Applicant Workflow	Google Analytics in Applicant Workflow	Yes	Organizations can now use Google Analytics or Universal Analytics to track applicants as they are going through career

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			sites, job postings, and application workflows.
Inbound Data Feeds for Candidates and Applicants		Yes	With this enhancement, the Data Load Wizard now supports scheduling of inbound data feeds (IDF or recurring loads) for Candidates and Applications.
Multiposting Integration		Yes	The Multiposting integration enables recruiters to post a requisition that has multiple language translations to multiple job boards that support multiple languages. Through an integration with Multiposting, recruiters can select the desired job boards from the External Postings page of the job requisition and post the job to more than one job board that supports multiple languages. Recruiters will be able to see the latest statistics for each job board, as well as take actions such as edit the job posting, delete the job posting, and repost the job when the job posting expires.
Onboarding Manager Usability Enhancements	Onboarding Manager Usability Enhancements		With this enhancement, many Onboarding usability enhancements are made.
Recruiting and Candidate Search Usability Enhancements	Recruiting and Candidate Search Usability Enhancements		With this enhancement, many Recruiting and Candidate Search usability enhancements are made.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Requisition Usability Enhancements	Requisition Usability Enhancements		With this enhancement, the following requisition enhancements are made: o Requisition custom fields on the requisition and requisition request can be set as read-only or editable. o New custom fields can be created in Requisition and Applicant Preferences. o Cost Center organizational unit (OU) can now be viewed on a requisition, requisition template, and requisition request. o Custom field data entered in the Position OU is copied over to the requisition template.
SEO for Career Sites and Job Postings	SEO for Career Sites and Job Postings	See Notes	With this enhancement, career sites and job postings can now be optimized in order to determine whether or not the career site should be indexed by search engines. The meta page title and description for job postings can also be customized, which is needed to optimize career sites for search engines. Optimizing career sites can also help the career site rank higher in search engine results for potential applicants that search for jobs through search engines instead of by going to an organization's job

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			page on their website.
Static URL Enhancement	Static URL for Viewing and Sharing Career Site Search Results and Applicant Resumes		With this enhancement, recruiters will be able to share job search results and lists of applicant resumes using a static URL that can be sent via email or embedded in a button on a career site. The URL can be accessed without needing to log in to the career site.
Talent Pools	Talent Pools	Yes	With this enhancement, the Manage Talent Pools functionality is redesigned with a new user interface (UI) and the integration of Recruiting features. For portals with Recruiting, talent pools can now be used to source applicants for job requisitions. Candidates can be added from Manage Applicants and can be added to job requisitions from within the Manage Talent Pools page.
Custom Reports - Additional Recruiting Fields	Custom Reports - Additional Recruiting Fieldg		With this enhancement, fields are added to the Requisition and User sections for Recruiting Custom Reports.
Reports - Increase Character Limit for Question User Comment	Onboarding Custom Report		With this enhancement, when running Form Management Custom Reports or Onboarding Custom Reports, the character limit for the **Question User Comment** field is increased from 500 to 1200. The field appears in the Form Template section of these reports.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Reports - Onboarding and Forms in Multi-Module Custom Report	Onboarding Custom Report		With this enhancement, Onboarding and Forms modules are added to the Multi-Module Custom Report.
Reports - Onboarding in Custom Reports	Onboarding Custom Report		With this enhancement, an Onboarding Custom Report is now available in custom reporting. This report allows you to create customized reports on onboarding data. The onboarding data can be used to make informed decisions about where new hires are having trouble in the onboarding process.

Succession Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Talent Pools Redesign	Talent Pools Redesign	Yes	With this enhancement, the Manage Talent Pools functionality is redesigned with a new user interface (UI) and the integration of Recruiting features. For portals with Recruiting, talent pools can now be used to source applicants for job requisitions. Candidates can be added from Manage Applicants and can be added to job requisitions from within the Manage Talent Pools page.
Custom Reports -	Custom Report -		With this enhancement, data for Succession Management Plan (SMP)

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Support Unlaunched Tasks	Support Unlaunched Tasks		tasks that have not yet been launched will be visible in the report output when running Succession Custom Reports. Prior to this enhancement, tasks that were not launched for respective users were not being pulled into the report output.

New and Enhanced Permissions for April '16 Release

The following permissions are new for the April '16 release:

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
Core	Duplicate User Management Preferences - Manage	Grants ability to access and configure management of duplicate records, including parameters used to prevent duplicates. This permission cannot be constrained. This is an administrator permission.	Core Administration
Core	Form Completion - View and Edit OU and Employee Relation Fields	Allow users to view and modify organizational unit (OU) and employee relation fields when completing a form that contains the fields. The constraints on this permission determine which fields the user can view and edit when completing a form. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User Subordinates. This is an end user permission.	Core
Core	Form Proxy Completion - Manage	Allows administrator to configure the Proxy Availability settings for a form. These settings determine which users can complete the form on behalf of other users and for which users they can complete the form. This permission can be constrained by OU, User's OU, User, and Employee Relationship. This is an administrator permission.	Forms Administration
Core	Prevent Duplicate Users	Grants ability to view user accounts that have been	Core Administration

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
	- Reconcile	identified as potential duplicates. Administrators can only view pending user records that were created by administrators who are within the constraints on this permission. This permission can be constrained by OU and User's OU. This is an administrator permission.	
Core	Snapshot - Badges	Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Core	Snapshot - Leaderboard	Enables user to view the Leaderboard widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission	Universal Profile

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Leaderboard widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	
Core	Work Force Planning - Administrator	Grants access to the Headcount Planning page. Users with this permission can also create new headcount plans for any part of the organization, as well as create subplans that have been assigned to them. Administrators can only view plans that they have created or to which they were assigned as a Co-Planner or Primary Planner This is an administrator permission.	Core Administration
Core	Work Force Planning - Subplanner	Grants the ability to complete subplans that have been assigned to the user. Users with this permission cannot create new headcount plans or view all plans. They can only view plans that they create	Core Administration

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		and plans in which they are assigned a role of Owner, Subplanner, or Co-Planner.	
Edge	Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Edge	Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Learning	Default Training Completion Signature Preferences	Grants ability to manage Default Training Completion Signature preferences at the portal level. This enables the administrator to set the default setting for whether an electronic training completion signature is required. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Learning	Learning Badge - View	Grants ability to view the Badge field on the LO Details page and the Training Completion page. This permission cannot be	Learning

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		constrained.	
Learning	Learning Points - View	Grants ability to view the Points field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Learning	Training Completion Page Preferences - Manage	Grants ability to access and edit the Training Completion Page Preferences where the administrator can configure the default behavior for training completion pages, including whether a completion page is enabled by default for each learning object (LO) type and the default completion message that appears on the Training Completion page. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Recruiting	Applicants: Initiate Background Check	This permission in the Recruiting category grants access to manage background checks from the Applicant Profile page. This applies to background checks that have been configured in the Integration Center. This permission cannot be constrained. Users who have this permission will have an Assign to Applicant link in the background check status type panel on the Applicant Profile page. Once the background check is assigned, the page will display "Assigned - [Date	Recruiting

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		Assigned]." ***Note:*** *This permission allows users to no longer need to set background check status as "Sensitive." There is no impact to sensitive statuses that are currently set.*	
Recruiting	Applicants: View Background Check Status	This permission in the Recruiting category allows users to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained. ***Note:*** *This permission allows users to no longer need to set background check status as "Sensitive." There is no impact to sensitive statuses that are currently set.*	Recruiting
Recruiting	Applicants: View Background Check Status and Details Link	This permission in the Recruiting category allows users to view the background check status and view a link to access the background check report, which can be found in the background check status type panel on the Applicant Profile page. This permission cannot be constrained. ***Note:*** *This permission allows users to no longer need to set background check status as "Sensitive." There is no impact to sensitive statuses that are currently set.*	Recruiting
Recruiting	External Search: Manage	Grants access to view and manage the external sourcing functionality. This permission cannot be constrained.	Recruiting
Reporting	Custom	Grants ability to create and	Reports -

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
	Onboarding Report - Create	edit custom Onboarding reports. This permission refers to creating custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Analytics
Reporting	Custom Onboarding Report - View	Grants ability to view results of custom Onboarding reports created by self or shared by others. This permission refers to viewing custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics
View	View People Preferences Page	Grants access to the View People Preferences page, which allows administrators to configure the View People page according to their needs per organizational unit (OU). This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View
View	View People: Share	Grants access to open View People to view shared lists. Can dynamically grant access to users to only view the lists that have been shared with the user. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports, and User's	View

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		Subordinates.	
View	View People: View	Grants access to open View People to see results and share lists. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View

The following existing permissions are enhanced for the April '16 release:

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
Core	Badge & Point Preferences - Manage	The Badge Preferences - Manage permission name is changed to Badge & Point Preferences - Manage. Also, the permission category is changed from Universal Profile to Core Administration.	Core Administration
Core	Feedback - View and Post	This permission can now be constrained by Employee Relationship.	Universal Profile
Core	Snapshot - Competencies	This permission can now be constrained by Employee Relationship.	Universal Profile
Core	Snapshot - Development Plans	This permission can now be constrained by Employee Relationship.	Universal Profile
Core	Snapshot - Reviews	This permission can now be constrained by Employee Relationship.	Universal Profile
Recruiting	Application Custom Fields - Manage	The permission description is modified to indicate that the permission also grants access to the Applicant Custom Fields and Application Custom Fields sections of the Requisition and Applicant Preferences page.	Recruiting Administration

Release Notes Updates

Changes have been made on 19 May 2016, to the release notes for the April '16 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Insights Career Mobility	This is new functionality.	Include detailed release notes for Insights Career Mobility.

Changes have been made on 10 May 2016, to the release notes for the April '16 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Headcount Planning	This is new functionality.	Introduce Headcount Planning.
Insights Career Mobility	This is new functionality.	Introduce Career Mobility.
View People	This is new functionality.	Introduce View People.

Edge

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Integrate	This is new functionality.	Introduce Edge Integrate.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Broadbean External Sourcing	This is new functionality.	Introduce new Broadbean External Sourcing functionality.
FADV Enhancements and Migrate FADV from IUP to	This is new functionality.	Introduce new FADV functionality.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge		
Multiposting Integration	This is new functionality.	Introduce new Multiposting Integration.
Recruiting and Candidate Search Usability Enhancements	Recruiting Usability Enhancements	Clarified the explanation in the Candidate Search Opt-Out Prevention bullet.

Changes have been made on 29 April 2016, to the release notes for the April '16 release:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Increased Video Size	Increased Video Size	This is a new enhancement.
Learning Rewards & Recognition	Rewards and Recognition Overview	Updated the constraints on the Badge & Point Preferences - Manage permission.
Training Completion	Training Completion Overview	Clarified that the Training Completion page is only available to organizations using the redesigned Transcript.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Performance Rewards and Recognition - Leaderboard	Performance Rewards and Recognition - Leaderboard	Updated the constraints on the Badge & Point Preferences - Manage permission.

Changes have been made on 22 April 2016, to the release notes for the April '16 release:

Note: *The changes on 22 April 2016 will only be visible in the release notes that are posted to the Client Success Center. The changes will be visible in Online Help on 29 April 2016.*

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Training Completion	Training Completion Overview Training Completion Page	Updated the Training Completion Page Availability & Redirection section to better organize scenarios when automatic redirection will not occur. The content is not impacted by this change.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Form Management Custom Report	Form Management Custom Report	Clarified that the name of the Form Management Custom Report is changed to Training Form Management Report. Previously, the release notes indicated that Form Management Custom Report was a field name that was changing to Training Form Management Report.
Google Analytics in Applicant Workflow	Google Analytics in Applicant Workflow	An "Organizations that Currently Have Google Analytics Snippet on ATS Pages" section is added to clarify this enhancement for organizations that already had the Google Analytics code on their career page footer.
Recruiting and Candidate Search Usability Enhancements	Recruiting Usability Enhancements	Added text to the Custom Email Message bullet to indicate that HTML text editing features are not available for the **Send Email from Template** option on the Applicant Profile > Summary page.
Recruiting and Candidate Search Usability Enhancements	Recruiting Usability Enhancements	Changed the Pre-Screening Questions - Screen Out Option bullet to indicate that marking multiple options correct for Multiple Choice Single Answer questions can be done on the Create/Edit Question

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		page when configuring the pre-screening question. The correct answers cannot be changed on the Screening Options pop-up.

Succession

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Custom Report - Support Unlaunched Tasks	Custom Report - Support Unlaunched Tasks	The name of the enhancement is changed to Custom Reports - Update to Task Status for Launched Tasks. The release notes have been updated to indicate that Succession Management Plan (SMP) tasks that have been started will now accurately reflect in reporting. Text has been removed that indicated that not started tasks will be visible in the report output when running Succession Custom Reports.

Changes have been made on 20 April 2016, to the release notes for the April '16 release:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Course Recommendations Exclusion Flag	Course Recommendations Exclusion Flag	Clarified that the list of courses that are recommended to users is refreshed every seven days.
Learning Rewards & Recognition	Badge & Point Preferences - Badges	Clarified the recommended size for badge images, and added information for creating badge images.
Tin Can (xAPI) Support - Learning Record Store (LRS)	Tin Can (xAPI) Support - Learning Record Store (LRS)	Added an Integration Guidelines document to the Implementation section.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Data Load Wizard - Support for Keyword and Cost Center OU in Job Requisition and Job Requisition Templates	Data Load Wizard - Support for Keyword and Cost Center OU in Job Requisition and Job Requisition Templates	Clarified that this enhancement supports the Requisition Usability Enhancements.
Inbound Data Feeds for Candidates and Applicants	Inbound Data Feeds for Candidates and Applicants	This is a new enhancement.

Changes have been made on 15 April 2016, to the release notes for the April '16 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Language Pack Enhancements - Dutch, Czech, Slovakia	Language Pack Enhancements - Dutch, Czech, Slovakia	Updated some of the new translation values. Also, removed some translation values that are not applicable.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learning Rewards & Recognition	Rewards and Recognition Overview Badge & Point Preferences - Badges Badge & Point Preferences -	Updated the name of the Badge Preferences - Manage permission to be more clear.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Points	
Learning Rewards & Recognition	Badge & Point Preferences - Badges	Added the names and descriptions of the default Learning badges.
Learning Rewards & Recognition	Snapshot General Preferences	Updated the navigation instructions for the Snapshot General Preferences page.
Training Completion	Training Completion Overview Training Completion Page	Updated the Training Completion Page Availability & Redirection section to more clearly define when the Training Completion page is available to users. More clearly defined when the Training Completion page is automatically displayed to users and when users must manually navigate to the Training Completion page.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Performance Rewards and Recognition - Leaderboard	Performance Rewards and Recognition - Leaderboard	Updated the name of the Badge Preferences - Manage permission to be more clear.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Onboarding Custom Report	Onboarding Custom Report	Added the Forms Management - Approval permission. This permission will now control the visibility of the Form Approval section. For users who do not have this permission, the Form Approval section will not display on the report.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Onboarding and Forms in Multi-Module Custom Report	Onboarding and Forms in Multi-Module Custom Report	Removed, as this enhancement was not intended to be part of the April '16 release.

Compensation

Employee Salary Management Redesign

Employee Salary Management Redesign

With this enhancement, the Employee Salary Management page is redesigned to improve the look and feel of the page. In addition, employee salary data storage is optimized to enable the system to handle more robust salary storage requirements for future salary management enhancements.

- When editing, adding, or viewing salary details, the Labor Hours column is renamed, and is now titled Annual Equivalency.
  - Previously, the Labor Hours column displayed the number of labor hours associated with the user's salary or rate. For example, the labor hours for a full-time employee who worked 40 hours per week would be 2080.
  - With this enhancement, the Annual Equivalency displays the equivalent number of years or hours associated with the selected wage type. For example, for an Hourly wage type with 40 hours per week and 52 weeks, the Annual Equivalency is 2080 Hours. For an Annual wage type, the Annual Equivalency is 1 Year.
- When editing or adding salary details, an Annual Equivalency table is now available for each salary or rate entry. This table displays the equivalent annual and hourly rates. For example, if the rate is Annual, then the table displays the annual rate and the hourly rate based on 2080 labor hours per year. If the rate is Hourly, then the table displays the hourly rate and the annual rate based on the number of labor hours that is specified. This table can be accessed by clicking the Expand arrow > to the left of the salary or rate.
  - When editing or adding a salary or rate, the Annual Equivalency information may be editable. When the Wage Type is set to Annual, this table enables the administrator to set the number of labor hours that is equivalent to one year. When the Wage Type is set to Hourly, this table is read-only.

This enhancement does not impact data feeds.

Implementation

Upon release, this functionality is automatically enabled in all portals for organizations using Compensation or Link. This functionality cannot be disabled.

Security

The following existing permission applies 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

Employee Salary Management

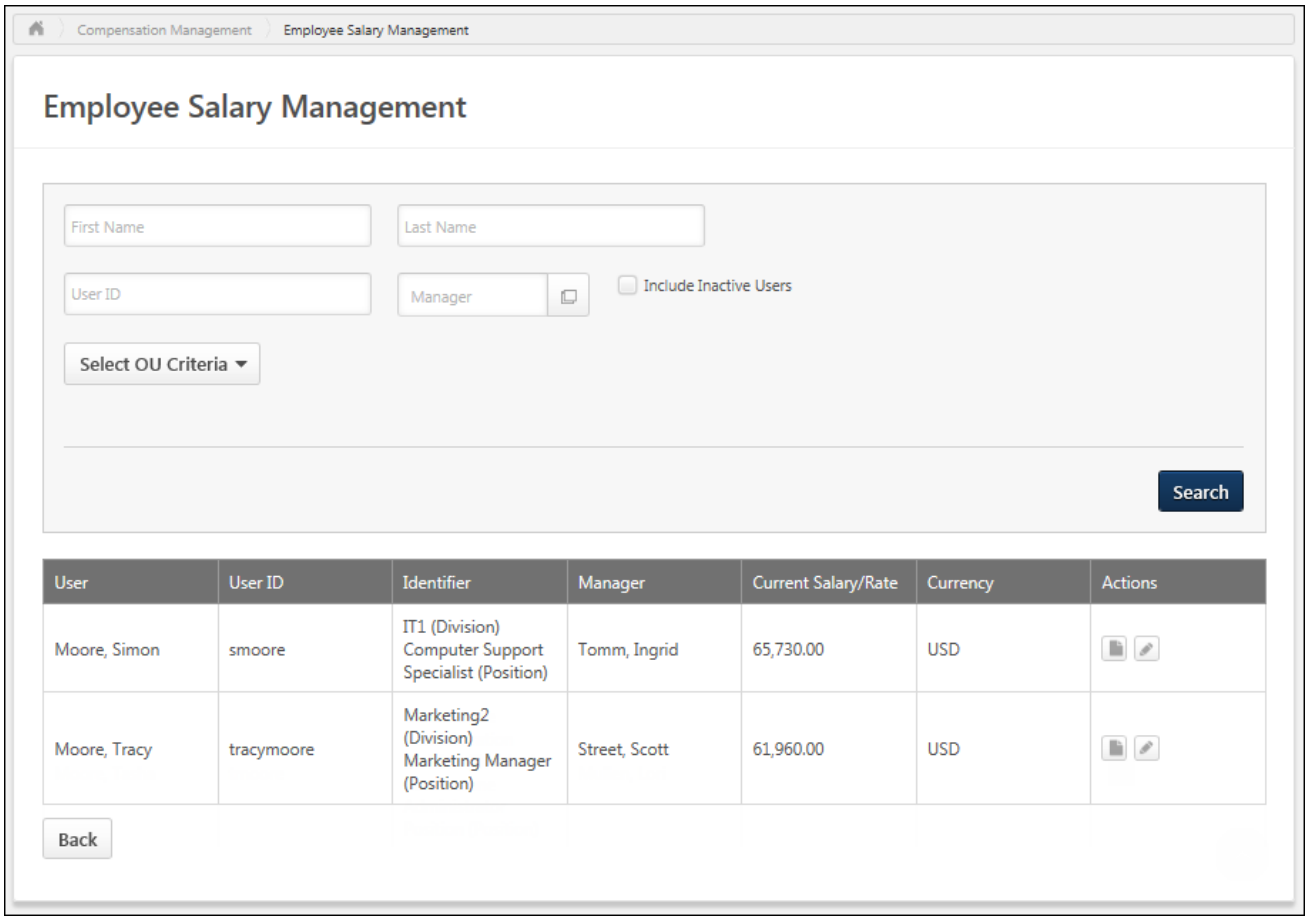
With this enhancement, the Employee Salary Management page is redesigned to improve the look and feel of the page. In addition, employee salary data storage is optimized to enable the system to handle more robust salary storage requirements for future salary management enhancements.

Only the appearance of this page has changed. All functionality on this page is unchanged, including the search fields and the information that is displayed in the table.

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


Compensation Management
Employee Salary Management
Employee Salary Management
First Name
Last Name
User ID
Manager
Include Inactive Users
Select OU Criteria
Search
User
User ID
Identifier
Manager
Current Salary/Rate
Currency
Actions
Moore, Simon
smoore
IT1 (Division) Computer Support Specialist (Position)
Tomm, Ingrid
65,730.00
USD
Moore, Tracy
tracymoore
Marketing2 (Division) Marketing Manager (Position)
Street, Scott
61,960.00
USD
Back

Employee Salary Management - View Salary Details

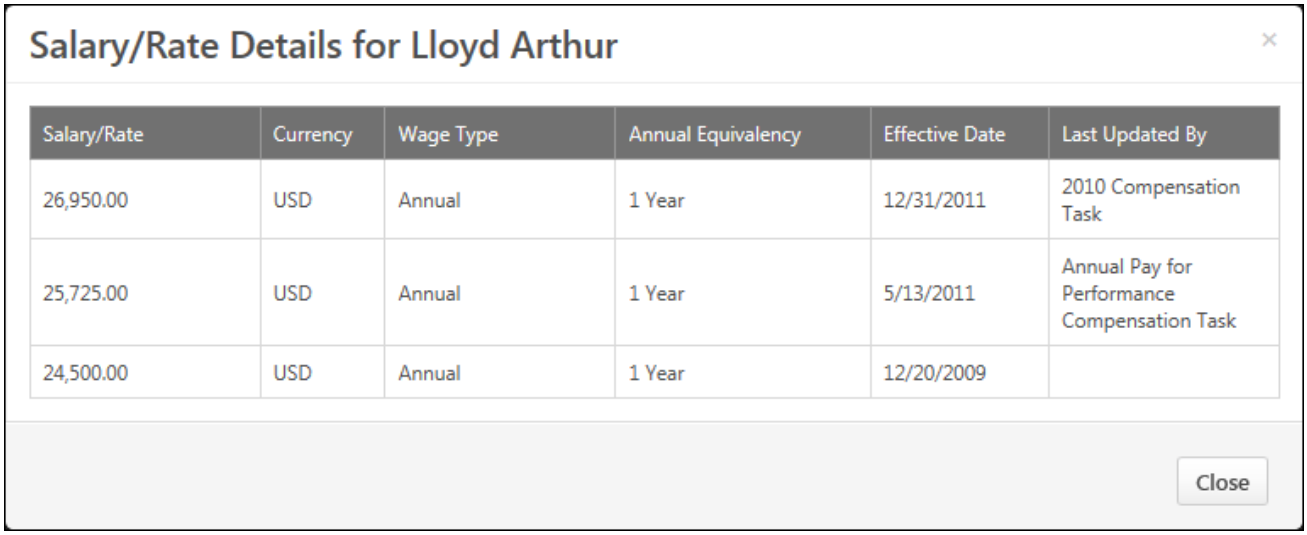
With this enhancement, the View Salary Details pop-up is redesigned to improve the look and feel of the page. Also, the following changes have been made to the pop-up:

- The Labor Hours column is renamed, and is now titled Annual Equivalency.
  - Previously, the Labor Hours column displayed the number of labor hours associated with the user's salary or rate. For example, the labor hours for a full-time employee who worked 40 hours per week would be 2080.
  - With this enhancement, the Annual Equivalency displays the equivalent number of years or hours associated with the selected wage type. For example, for an Hourly wage type with 40 hours per week and 52 weeks, the Annual Equivalency is 2080 Hours. For an Annual wage type, the Annual Equivalency is 1 Year.

To view the Salary/Rate Details for a user, go to ADMIN > TOOLS > COMPENSATION MANAGEMENT > EMPLOYEE SALARIES. Then, click the View icon in the Actions column for the appropriate user.

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



Employee Salary Management - Edit Salary Details

With this enhancement, the Edit Salary Details page is redesigned to improve the look and feel of the page. Also, the following changes have been made to the page:

- The Add Salary/Rate link is now a button.
- The Labor Hours column is renamed, and is now titled Annual Equivalency.
  - Previously, the Labor Hours column displayed the number of labor hours associated with the user's salary or rate. For example, the labor hours for a full-time employee who worked 40 hours per week would be 2080.
  - With this enhancement, the Annual Equivalency displays the equivalent number of years or hours associated with the selected wage type. For example, for an Hourly wage type with 40 hours per week and 52 weeks, the Annual Equivalency is 2080 Hours. For an Annual wage type, the Annual Equivalency is 1 Year.
- An Annual Equivalency table is now available for each salary or rate entry. This table displays the equivalent annual and hourly rates. For example, if the rate is Annual, then the table displays the annual rate and the hourly rate based on 2080 labor hours per year. If the rate is Hourly, then the table displays the hourly rate and the annual rate based on the number of labor hours that is specified. This table can be accessed by clicking the Expand arrow > to the left of the salary or rate.
  - When editing or adding a salary or rate, the Annual Equivalency information may be editable. When the Wage Type is set to Annual, this table enables the administrator to set the number of labor hours that is equivalent to one year. When the Wage Type is set to Hourly, this table is read-only.

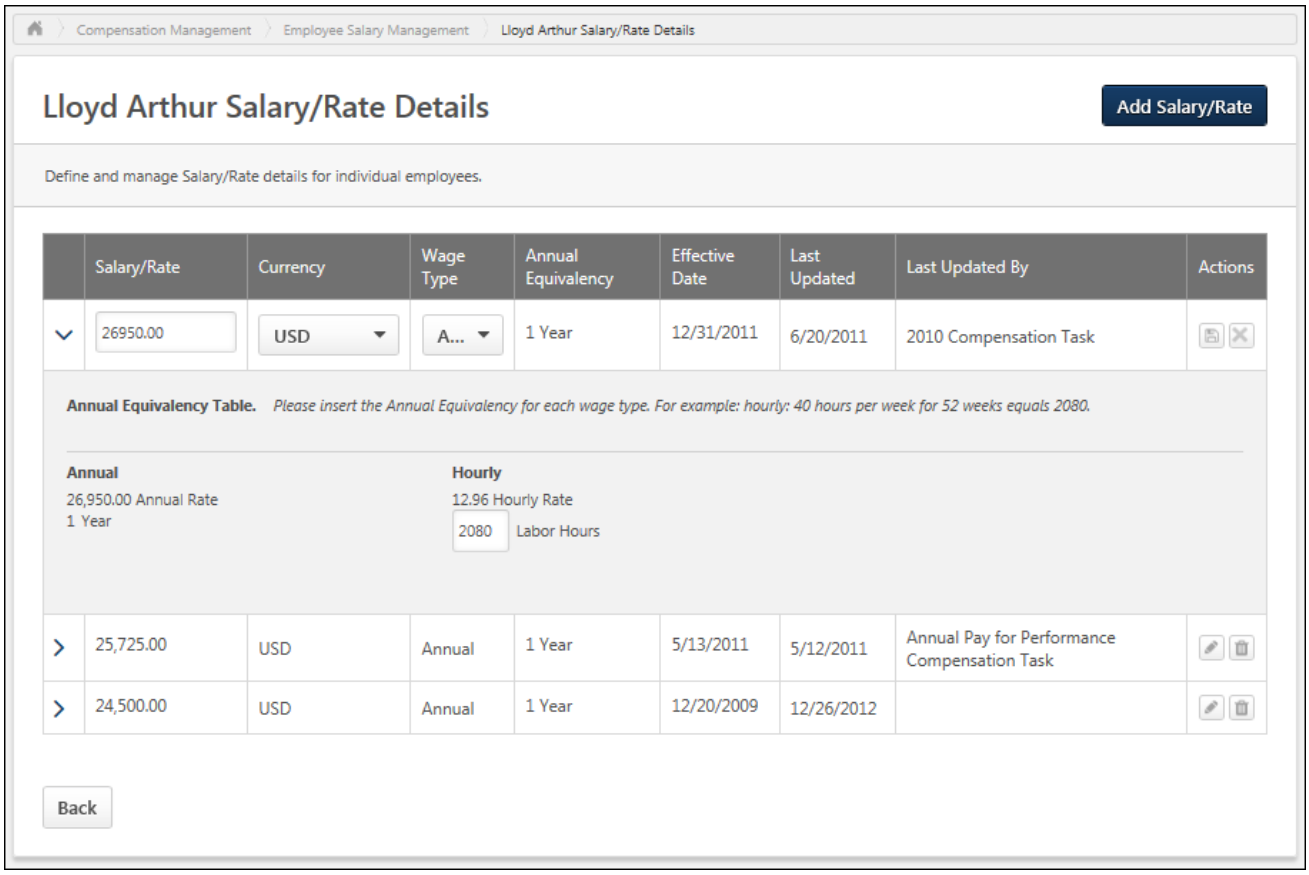
To edit the salary details for a user, go to ADMIN > TOOLS > COMPENSATION MANAGEMENT > EMPLOYEE SALARIES. Then, click the Edit icon in the Actions column for the appropriate user.

To add a salary for a user, go to ADMIN > TOOLS > COMPENSATION MANAGEMENT > EMPLOYEE SALARIES. Click the Edit icon in the Options column for the appropriate user. Then, click the **ADD SALARY/RATE** button.

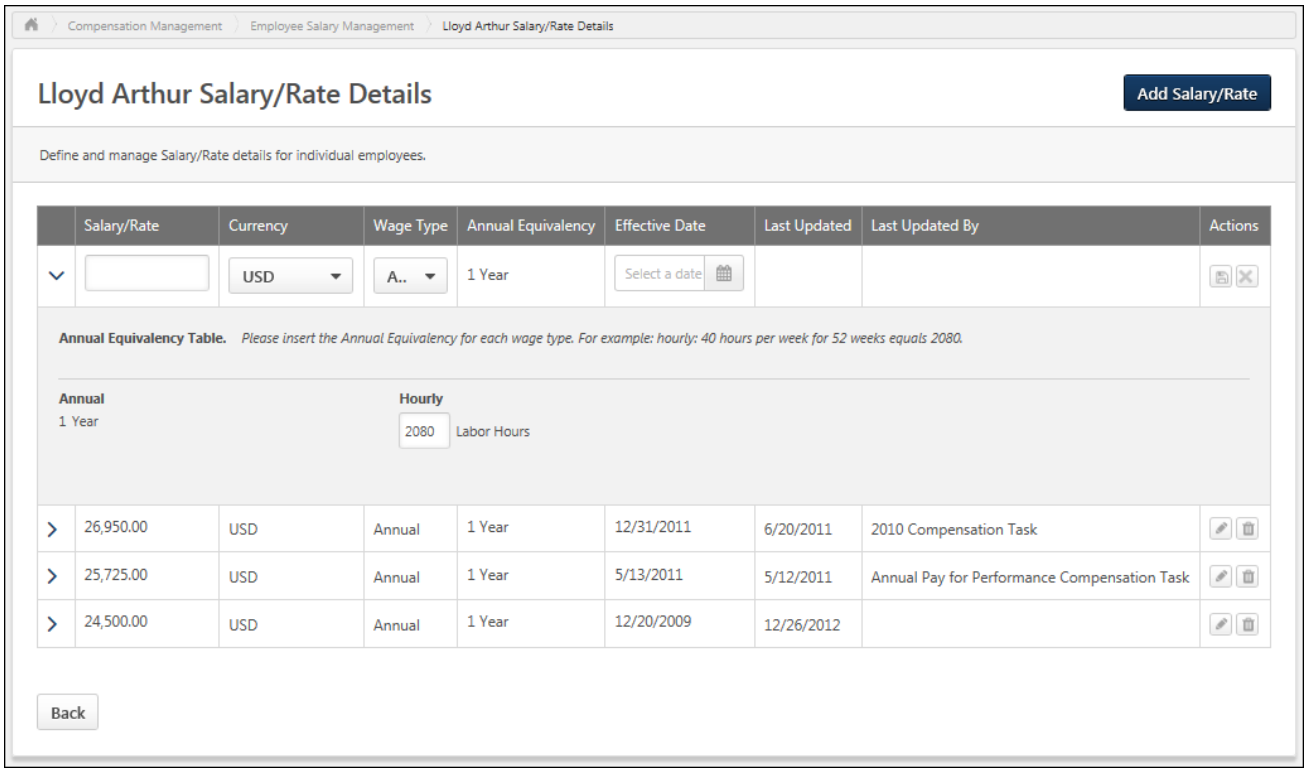
Permissions

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

Edit Salary/Rate



Add Salary/Rate



Additional Compensation Fields

New Compensation fields are added to Compensation and Multi-Module Custom Reports.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Compensation Report - Create	Grants ability to create and edit custom Compensation reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Subordinates.	Reports - Analytics
Custom Compensation Report - View	Grants ability to view results of custom Compensation reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Subordinates.	Reports - Analytics

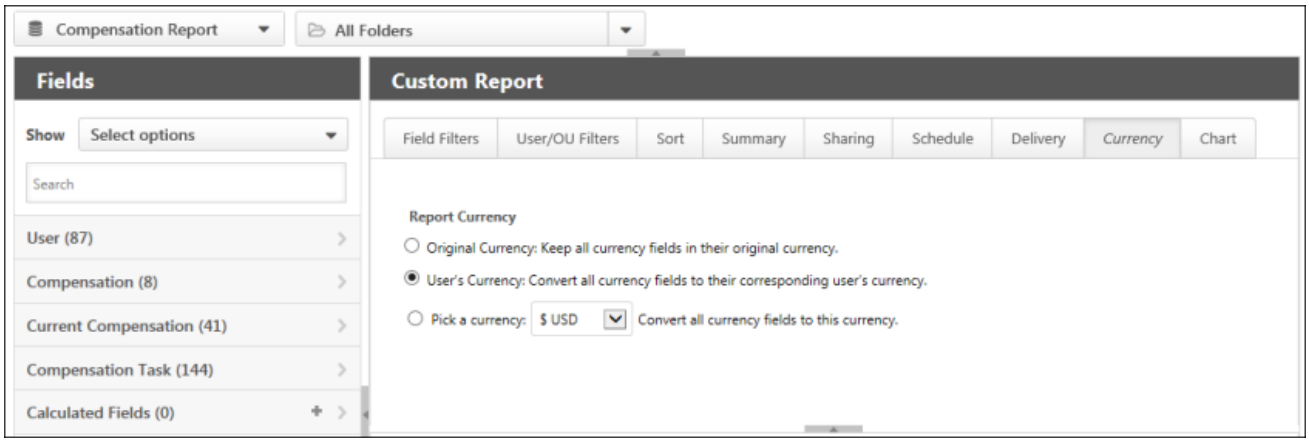
Compensation Fields

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Currency ID	Currency ID will be listed in the Currency Code output, such as USD. This is found in Employee Salary Management in the Currency column.	Text
Labor Hours	Labor Hours will be listed in the Labor Hours output. This is found in Employee Salary Management in the Labor Hours column.	Numeric
Salary	This is the User's Salary/Rate from the Employee Salary Management page for the specific user. This report will display every salary for the user.	Numeric
Salary Effective Date	Salary Effective Date is unique for each salary. This is found in Employee Salary Management in the Effective Date column.	Date
Salary Last Updated By Task Name	This indicates the last time the salary was updated by a task. This is found in Employee Salary Management in the Last Updated column.	Text
Salary Last Updated By User Name	This indicates the last time the salary was updated by a user. This is found in Employee Salary Management in the Last Updated column.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Salary Last Updated Date	This displays the last person that updated the salary. This is found in Employee Salary Management in the Last Updated by column.	Date
Wage Type	Wage Type will be listed in the Wage Type output. This is found in Employee Salary Management in the Wage Type column.	Text

Support Currency on Currency Tab in Summarized Reports

With this enhancement, when running a Compensation Custom Report, if the **User's Currency** option is selected on the Currency tab, the currency conversion will be correctly reflected in the report output of summarized reports. Prior to this enhancement, with this option selected on the Currency tab, the currency conversion was not correctly reflected in summarized report outputs.



Use Case

1. Sam Smith is an analyst who must run a compensation report for a salary review being performed at his global company.
2. Sam goes to the Compensation Custom Report and creates a report of users and salaries.
3. Sam summarizes the report by location.
4. Sam goes to the Currency tab and selects **User's Currency: Convert all currency fields to their corresponding user's currency**.
5. Sam runs the report and reviews the output. He sees salaries listed in the corresponding user's currency.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Compensation Report - Create	Grants ability to create and edit custom Compensation reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Subordinates.	Reports - Analytics
Custom	Grants ability to view results of custom Compensation	Reports -

Compensation Report - View	reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Subordinates.	Analytics

Connect

Search within Communities

Search within Communities

Prior to this enhancement, users could only search for postings using the Global Search functionality. This required the user to navigate out of the Connect Communities area.

With this enhancement, users can search for postings from within a community or topic. The search returns all available postings within the current community or topic that match the user's search criteria.

Use Cases

Sally is a Release Communications Manager for Cornerstone. She visits the Success Center on a daily basis. While viewing the Connect community for the current release, Sally decides to search for postings related to Connect Availability. From the current release's Connect community, she searches for Connect Availability. The search returns all postings within the current release's community that match her search terms.

Implementation

Upon release, this functionality is automatically enabled in all portals for organizations using New Connect. This functionality cannot be disabled.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission 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
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

Community Main Tab - Search

Prior to this enhancement, users could only search for postings using the Global Search functionality. This required the user to navigate out of the Connect Communities area.

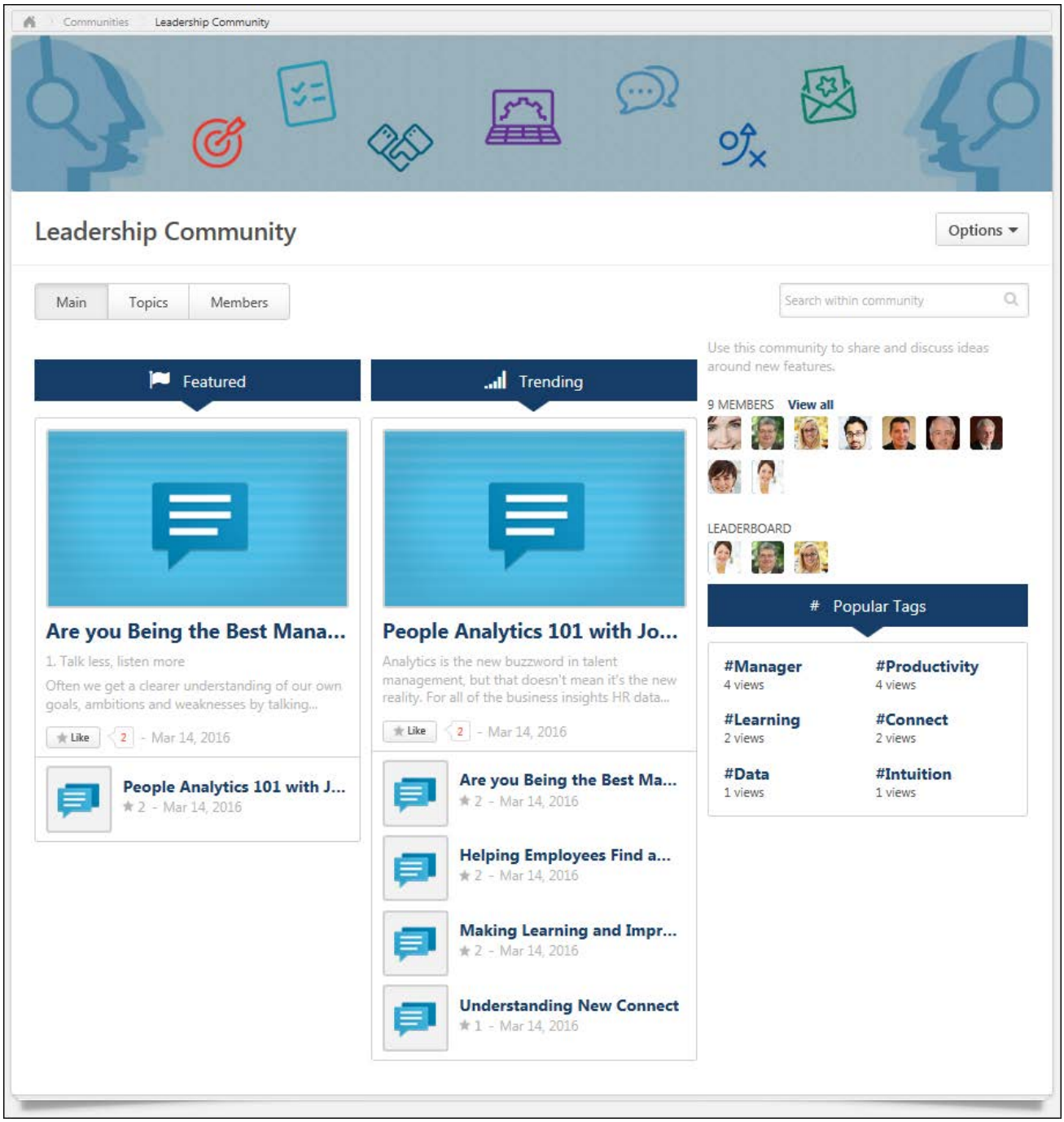
With this enhancement, users can search for postings from within a community. The search returns all available postings within the current community that matches the user's search criteria.

To access a community, go to CONNECT > COMMUNITIES. Then, click the community title.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. 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
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

To search for postings within a community, enter your search criteria in the **Search within community** field and either click the Search icon or press [Enter]. This opens the Community Search Results page. *See* **Posting Search Results** on page 67 *for additional information.*


Communities
Leadership Community
Leadership Community
Options
Main
Topics
Members
Search within community
Use this community to share and discuss ideas around new features.
Featured
Trending
9 MEMBERS View all
LEADERBOARD
Are you Being the Best Mana...
1. Talk less, listen more
Often we get a clearer understanding of our own goals, ambitions and weaknesses by talking...
Like 2 - Mar 14, 2016
People Analytics 101 with J...
2 - Mar 14, 2016
People Analytics 101 with Jo...
Analytics is the new buzzword in talent management, but that doesn't mean it's the new reality. For all of the business insights HR data...
Like 2 - Mar 14, 2016
Are you Being the Best Ma...
2 - Mar 14, 2016
Helping Employees Find a...
2 - Mar 14, 2016
Making Learning and Impr...
2 - Mar 14, 2016
Understanding New Connect
1 - Mar 14, 2016
Popular Tags
#Manager
4 views
#Productivity
4 views
#Learning
2 views
#Connect
2 views
#Data
1 views
#Intuition
1 views

Community Topics Tab - Search

Prior to this enhancement, users could only search for postings using the Global Search functionality. This required the user to navigate out of the Connect Communities area.

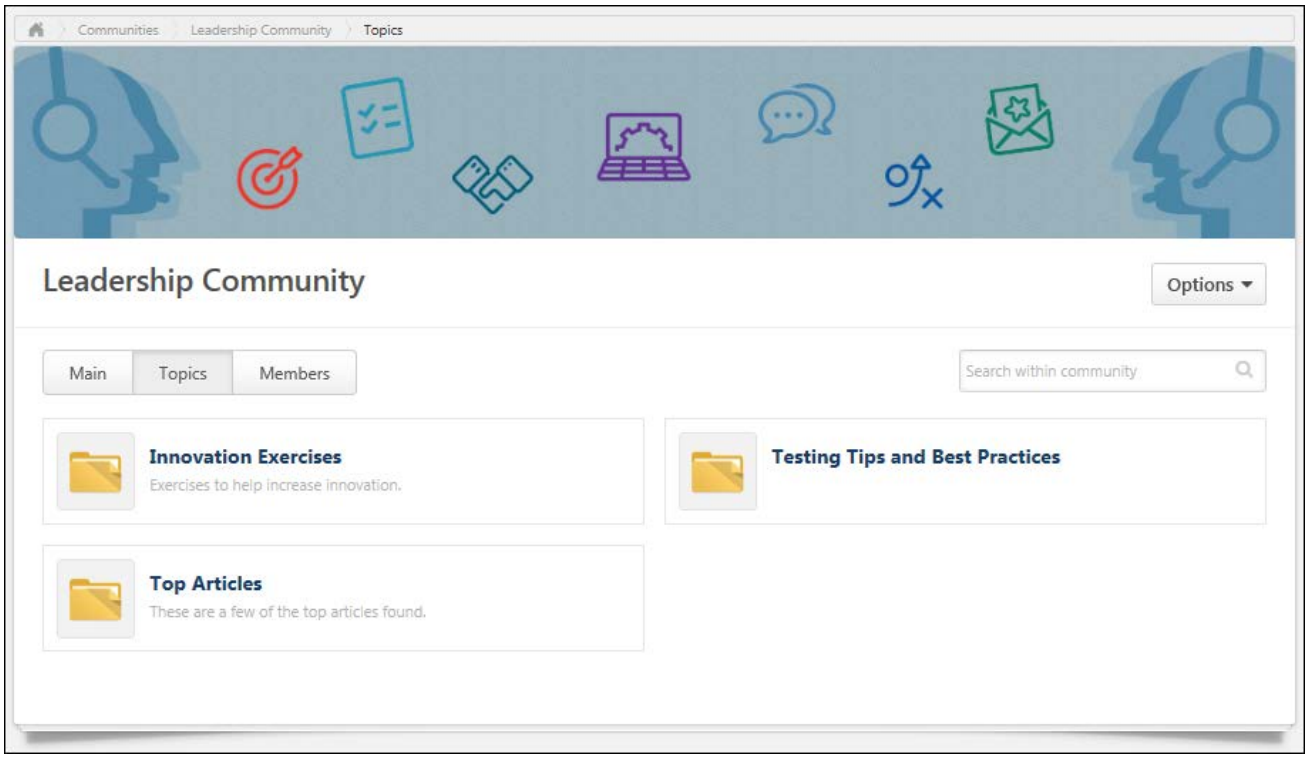
With this enhancement, users can search for postings from within a community. The search returns all available postings within the current community that matches the user's search criteria.

To access a community, go to CONNECT > COMMUNITIES. Then, click the community title.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. 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
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

To search for postings within a community, enter your search criteria in the **Search within community** field and either click the Search icon or press [Enter]. This opens the Community Search Results page. *See* **Posting Search Results** on page 67 *for additional information.*


Communities
Leadership Community
Topics
Leadership Community
Options
Main
Topics
Members
Search within community
Innovation Exercises
Exercises to help increase innovation.
Testing Tips and Best Practices
Top Articles
These are a few of the top articles found.

Topic Details Page - Search

Prior to this enhancement, users could only search for postings using the Global Search functionality. This required the user to navigate out of the Connect Communities area.

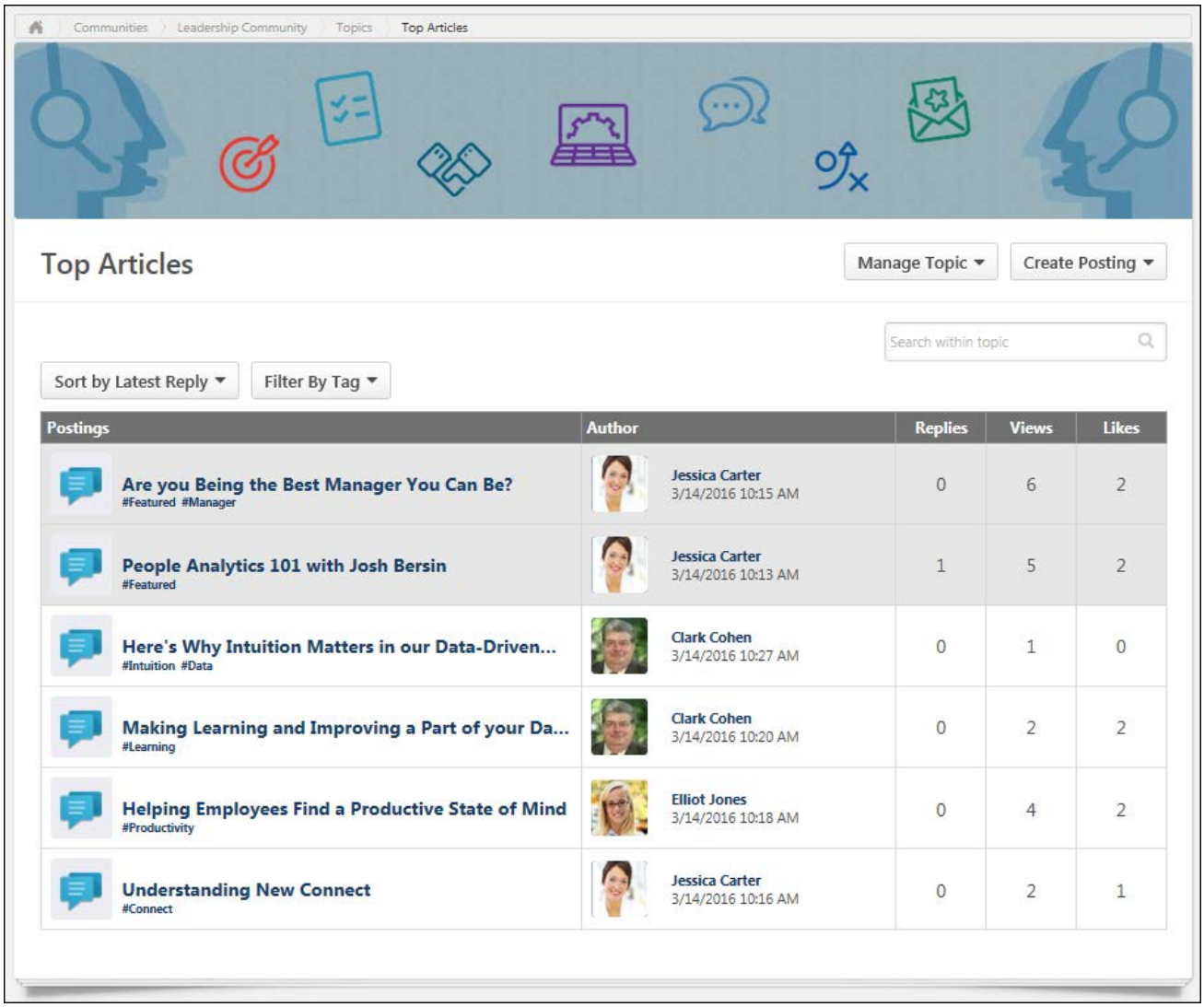
With this enhancement, users can search for postings from within a topic. The search returns all available postings within the current topic that matches the user's search criteria.

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
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
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

To search for postings within a topic and its subtopics, enter your search criteria in the **Search within topic** field and either click the Search icon or press [Enter]. This opens the Community Search Results page. *See* **Posting Search Results** on page 67 *for additional information.*


Communities
Leadership Community
Topics
Top Articles
Top Articles
Manage Topic
Create Posting
Search within topic
Sort by Latest Reply
Filter By Tag
Postings
Author
Replies
Views
Likes
Are you Being the Best Manager You Can Be?
#Featured #Manager
Jessica Carter
3/14/2016 10:15 AM
0
6
2
People Analytics 101 with Josh Bersin
#Featured
Jessica Carter
3/14/2016 10:13 AM
1
5
2
Here's Why Intuition Matters in our Data-Driven...
#Intuition #Data
Clark Cohen
3/14/2016 10:27 AM
0
1
0
Making Learning and Improving a Part of your Da...
#Learning
Clark Cohen
3/14/2016 10:20 AM
0
2
2
Helping Employees Find a Productive State of Mind
#Productivity
Elliot Jones
3/14/2016 10:18 AM
0
4
2
Understanding New Connect
#Connect
Jessica Carter
3/14/2016 10:16 AM
0
2
1

Posting Search Results

Prior to this enhancement, users could only search for postings using the Global Search functionality. This required the user to navigate out of the Connect Communities area.

With this enhancement, users can search for postings from within a community or topic. The search returns all available postings within the current community or topic that match the user's search criteria.

When searching for postings, the following fields may be searched:

- Title
- Body
- Replies
- File names for attached files
- URL title for attached URLs
- Posting author
- Community name
- Parent topics
- Tags

To search for postings within a community or topic, enter your search criteria in the **Search** field in the upper-right corner of the community or topic. Then, either click the Search icon or press [Enter]. This opens the Community Search Results page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. 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
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

Back

Click the **Back** link to return to the Community page or Topic Details page from which you initiated the search.

Search

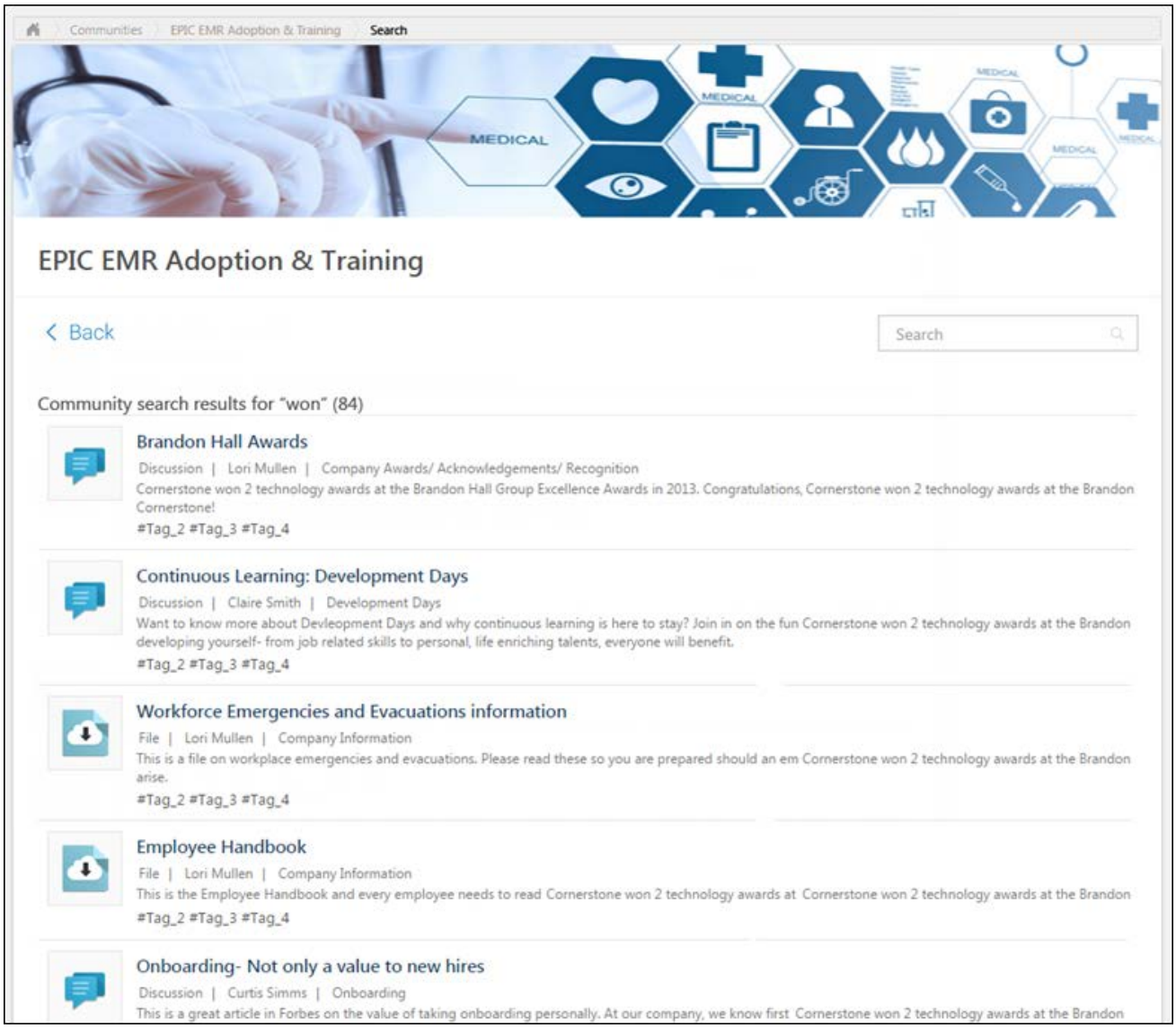
To initiate a new search, enter your search criteria in the **Search** field and either click the Search icon or press [Enter]. This refreshes the page with the new search results.

Search Results

In the search results, featured postings are displayed above non-featured postings.

The following information is displayed for each posting that matches your search criteria:

- Posting Icon - An icon is displayed to the left of the posting title. This icon reflects the posting type.
- Posting Title - This displays the posting title. Click the posting title to view the posting.
- Posting Type
- Author - This displays the posting author's photo and name and the date on which the original posting was created.
- Parent Topic - This displays the topic that is associated with the posting.
- Body - This displays the posting text, up to two lines.
- Tags - Any tags that are associated with the posting are displayed below the posting body. System-defined tags are displayed before user-defined tags. User-defined tags are displayed in chronological order. Up to five total tags are displayed.


Communities
EPIC EMR Adoption & Training
Search
MEDICAL
EPIC EMR Adoption & Training
Back
Search
Community search results for "won" (84)
Brandon Hall Awards
Discussion | Lori Mullen | Company Awards/ Acknowledgements/ Recognition
Cornerstone won 2 technology awards at the Brandon Hall Group Excellence Awards in 2013. Congratulations, Cornerstone won 2 technology awards at the Brandon Cornerstone!
#Tag_2 #Tag_3 #Tag_4
Continuous Learning: Development Days
Discussion | Claire Smith | Development Days
Want to know more about Devleopment Days and why continuous learning is here to stay? Join in on the fun Cornerstone won 2 technology awards at the Brandon developing yourself- from job related skills to personal, life enriching talents, everyone will benefit.
#Tag_2 #Tag_3 #Tag_4
Workforce Emergencies and Evacuations information
File | Lori Mullen | Company Information
This is a file on workplace emergencies and evacuations. Please read these so you are prepared should an em Cornerstone won 2 technology awards at the Brandon arise.
#Tag_2 #Tag_3 #Tag_4
Employee Handbook
File | Lori Mullen | Company Information
This is the Employee Handbook and every employee needs to read Cornerstone won 2 technology awards at Cornerstone won 2 technology awards at the Brandon
#Tag_2 #Tag_3 #Tag_4
Onboarding- Not only a value to new hires
Discussion | Curtis Simms | Onboarding
This is a great article in Forbes on the value of taking onboarding personally. At our company, we know first Cornerstone won 2 technology awards at the Brandon

Tags in Communities

Tags in Communities

Prior to this enhancement, only system-defined tags could be added to postings in Connect communities. This type of tag is only for display purposes and cannot be added to postings by end users.

With this enhancement, users are able to create custom tags and add them to postings in Connect communities. In addition, users may be able to search for postings by tag and filter postings by tag. When users can search for postings by tag, they can also click a tag that is associated with a posting to initiate a search for other postings with the same tag. This enhancement improves a user's ability to search for and discover content within Connect.

Use Cases

Fred is the administrator for a Connect community. Recently, there has been an influx of new postings within the community which has made it difficult to find relevant postings. Fred decides to tag postings with relevant tags so that members of the community can quickly sort postings and find the postings that are relevant to their search.

Harry is a new employee at Acme Co. Harry joined a community, and he is really interested in postings about Project Management. Harry wants to search for postings about Project Management. He finds a posting that has the Project Management tag, and he clicks the tag. This opens a search that displays all of the available postings that have the Project Management tag.

Considerations

User-defined tags cannot be localized.

Tags are not case-sensitive or accent-sensitive, however the tag is captured as it is entered. For example, Management is the same as management, and elephant is the same as élephant.

Tags cannot be added to the posting title or within comments.

Even if a tag is removed from all postings, it still remains in the system and will appear in the pop-up menu when searching for tags.

Implementation

Upon release, this functionality is automatically enabled in all portals for organizations using New Connect. This functionality cannot be disabled.

Glossary

- Tag - This is a keyword that can be added to Connect postings. These can be used to categorize postings, and users can use them to search for other postings with the same tag.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Admin Search Preferences - Manage	Grants ability to configure preferences for Global Search and Course Catalog within Search Preferences. The constraints of this permission are inherited from the Global Search Preferences - Manage permission. This is an administrator permission.	Learning - Administration
Global Search - Connect	Grants ability to search for Knowledge Bank and community postings via Global Search. This permission cannot be constrained. The user's ability to view a posting is determined by the user's ability to view the posting's Knowledge Bank or community topic. This is an end user permission. The availability of this permission is controlled by a backend setting.	New Connect
Global Search Preferences - Manage	Grants ability to configure Global Search Preferences. This is an administrator permission. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU and User's OU. By default, this permission is constrained to the organization.	Core Administration
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

Search Preferences - Connect

With this enhancement, users can create and add custom tags to a posting. In order to support this functionality, administrators can now configure Global Search to allow users to refine their search by posting tags.

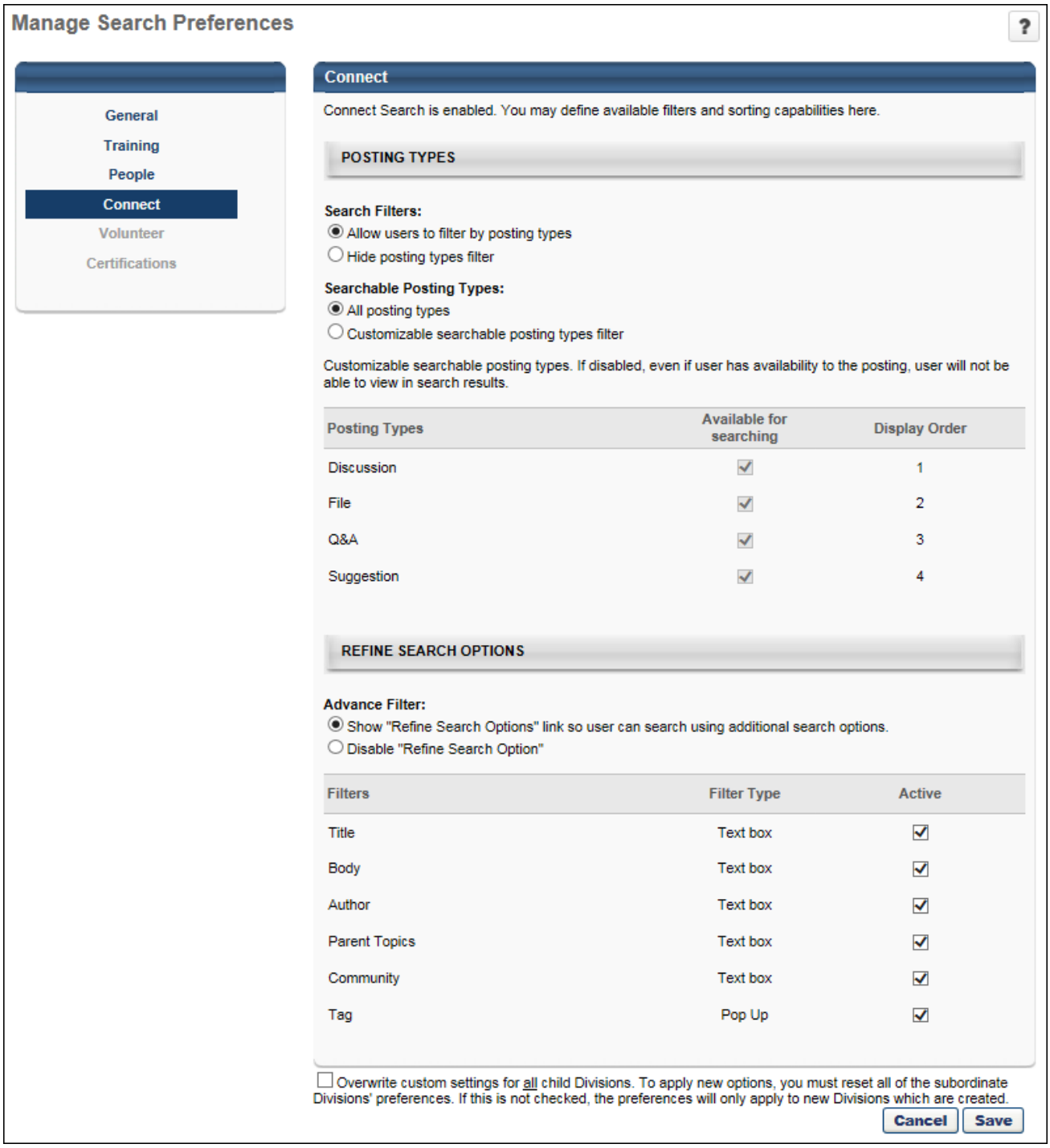
To access the Search Preferences - Connect page, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > SEARCH. Then, click the Connect tab on the left navigation bar. ***Note:*** *This tab is not clickable unless it is enabled as a search type on the General tab.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Admin Search Preferences - Manage	Grants ability to configure preferences for Global Search and Course Catalog within Search Preferences. The constraints of this permission are inherited from the Global Search Preferences - Manage permission. This is an administrator permission.	Learning - Administration
Global Search Preferences - Manage	Grants ability to configure Global Search Preferences. This is an administrator permission. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU and User's OU. By default, this permission is constrained to the organization.	Core Administration

In the *Refine Search Options* section, the following option is now available:

- **Tag** - When this option is selected, users are able to search for Connect postings by tag name. When this option is not selected, users cannot search by tag name. As a result, users cannot click a posting tag from other areas of the system to initiate a search for that tag. This includes the Posting view, the Topic Details page, and the Community Main tab.


Manage Search Preferences
?
General
Training
People
Connect
Volunteer
Certifications
Connect
Connect Search is enabled. You may define available filters and sorting capabilities here.
POSTING TYPES
Search Filters:
Allow users to filter by posting types
Hide posting types filter
Searchable Posting Types:
All posting types
Customizable searchable posting types filter
Customizable searchable posting types. If disabled, even if user has availability to the posting, user will not be able to view in search results.
Posting Types
Available for searching
Display Order
Discussion
1
File
2
Q&A
3
Suggestion
4
REFINE SEARCH OPTIONS
Advance Filter:
Show "Refine Search Options" link so user can search using additional search options.
Disable "Refine Search Option"
Filters
Filter Type
Active
Title
Text box
Body
Text box
Author
Text box
Parent Topics
Text box
Community
Text box
Tag
Pop Up
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.
Cancel
Save

Posting - Create/Edit

With this enhancement, user-defined tags or keywords can now be added to a posting when creating or editing a posting. Tags can be added to a posting in two ways:

- A new **Tags** field is now available when creating or editing a posting, which enables users to add tags or keywords to their posting. Once the posting is saved, the tags appear below the body of the posting. This also applies when creating postings for a community template for a program.
- Within the body of the posting, users can place a hashtag before a word. When the posting is saved, the word is added as a tag, and the tag appears below the body of the posting.

To create a posting, click the appropriate topic title from anywhere in the Knowledge Bank or communities. Then, from the **Create Posting** drop-down menu, select the appropriate posting type.

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

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Knowledge Bank/Communities New Posting Created	This email is triggered when a new Knowledge Bank or community posting is created. This email can be sent as a notification to Community Moderator, Community Members, Follower, or a specific user. A recipient must match the following criteria to receive the email: o User is within the availability criteria for the corresponding posting's parent topic. o User is within the constraints of the posting's parent topic's creator constraints. o User is a member of one of the communities with which the topic is shared.	New Connect

Tags

This section enables users to add tags or keywords to their posting. Once the posting is saved, the tags appears as links on the posting, and users can click a tag to view all postings that have the same tag. For example, if you add a "Time Management" tag to your posting, then clicking this tag will display all postings that include the "Time Management" tag. This is an effective way to categorize your posting. Once the posting is saved, you can use the tag to find other postings that have similar content.

To add a tag, enter the tag name in the field. Multiple tags can be added by adding a comma after each tag or by pressing [Enter] after each tag. Users can add new or existing tags. Tags are not case-sensitive or accent-sensitive, however the tag is captured as it is entered (e.g., Management is the same as management and elephant is the same as élephant). Each tag can contain a maximum of 70 characters, and the character limit for all tags in a posting is 200. ***Note:*** *If a user enters a tag name that is a system-defined tag such as Featured, then this is added as a user-defined tag, which behaves differently than a system-defined tag.*

To select a tag from a list of existing tags, click the **Add Existing Tags** link. This opens a pop-up, in which all existing user-defined tags are displayed. ***Note:*** *System-defined tags cannot be selected. These tags are automatically associated with a posting. See Single Item Select Pop-up.*

To remove a tag, click the Delete icon to the right of the tag name.

Hashtags

Hashtags can now be used in the body of the posting, and the system will apply the text after the hashtags as tags once the posting submitted.

Hashtags cannot be used within the posting title or within posting comments.

To add a tag to a posting using hashtags, enter a hashtag "#" within the posting body, and the text following the hashtag will be converted into a tag once the posting is submitted.

- Hashtags are not affected by accents on characters. Accents on characters are included in the tag.
- Spaces, new lines, and special characters end a hashtag.

A maximum of 200 tags can be added to a posting. If a posting has reached the maximum number of tags, then no additional tags are added, even if a hashtag is added to the posting body.

In order to remove a hashtag tag, the hashtag must be removed from the body of the posting, and the tag must be removed from the **Tags** field.

The following are examples of hashtags with spaces and special characters and the resulting tags:

HASHTAG	RESULTING TAG
#élephant	élephant

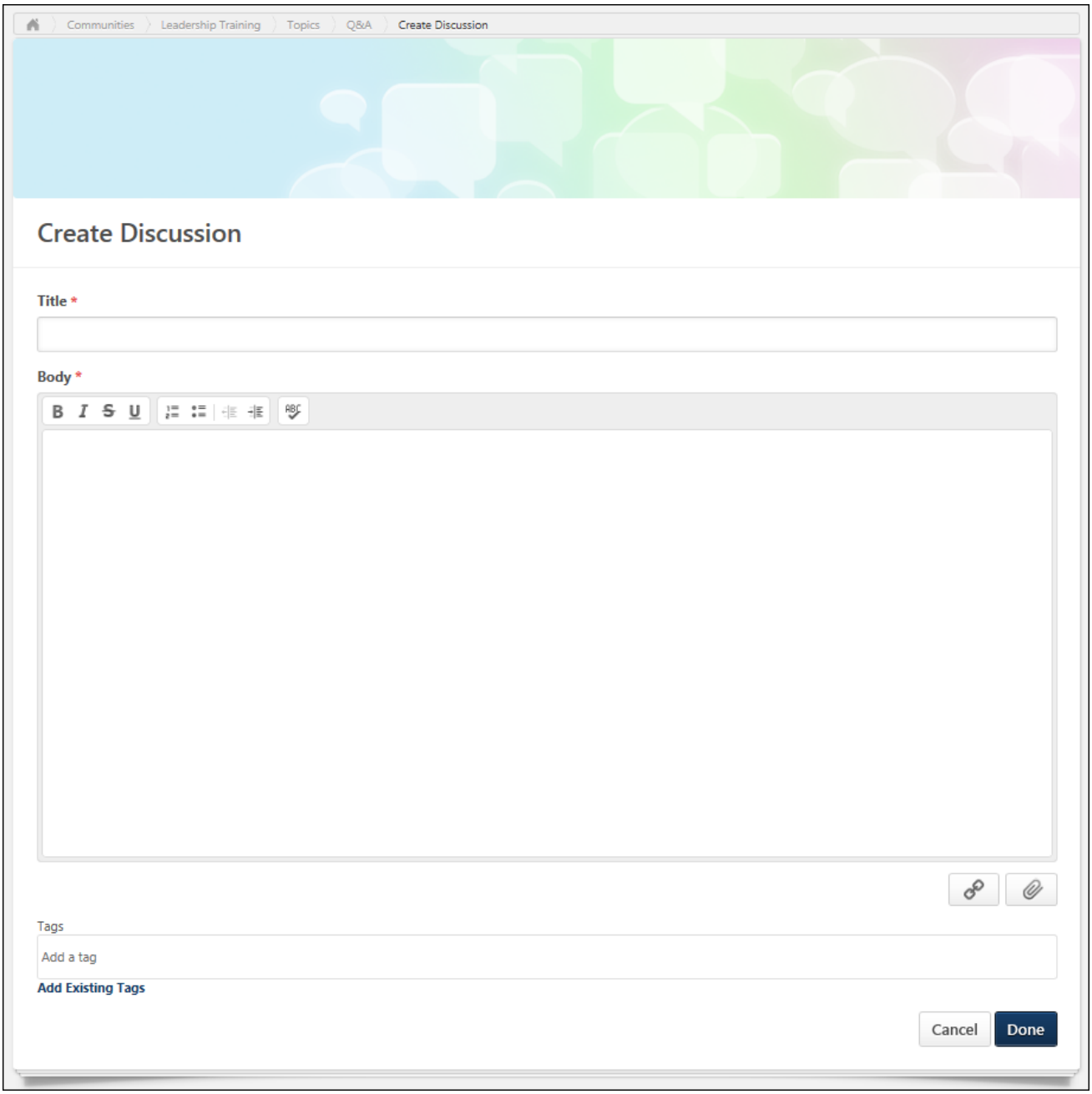
HASHTAG	RESULTING TAG
#Leadership and Responsibility	Leadership
#fish&chips	fish
#web2.0	web2
#isn't	isn
#a-b	a
#*.*	
#yay!	yay

Cohorts

Tags can be added to postings when creating a community template for a program.

When a cohort is created, the tags are added to the postings within the new cohort.

When a tag is removed from a posting within a community template, the tag is not removed from any existing postings within cohorts that have been created from the community template.


Communities
Leadership Training
Topics
Q&A
Create Discussion
Create Discussion
Title *
Body *
Tags
Add a tag
Add Existing Tags
Cancel
Done

Posting - View

With this enhancement, users can create and add custom tags to a posting. As with system-defined tags, any user-defined tags that are associated with the posting are displayed below the body of the posting. System tags are displayed before user-defined tags.

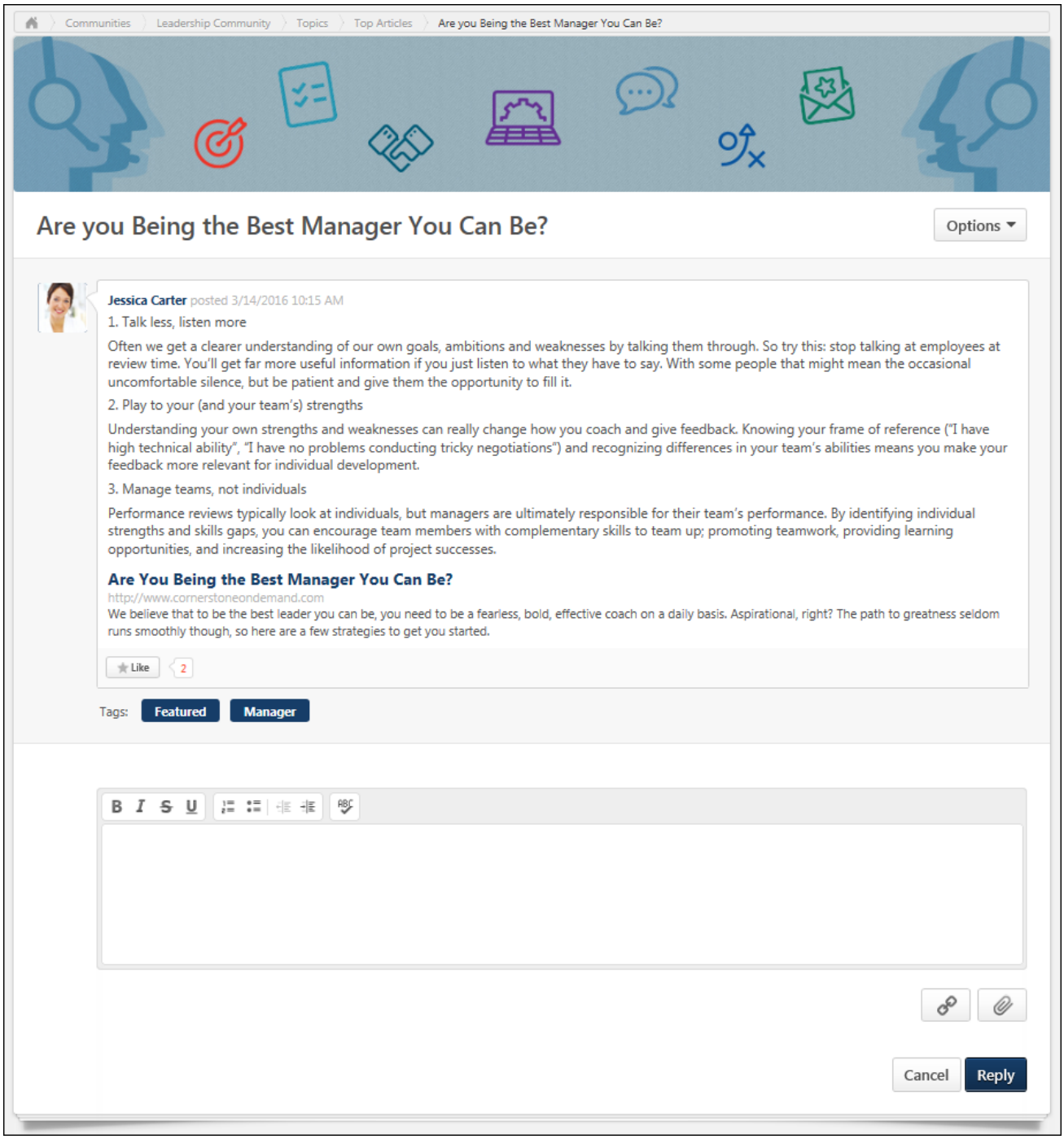
Users can click one of the tags to initiate a search within Global Search for all postings that contain the selected tag. Users can only view postings which they can access. ***Note:*** *The ability to click a posting tag to initiate a search is only available if the ability to search for Connect postings by tag is enabled via Search Preferences.*

Hashtags cannot be used to create a tag when commenting on a posting.

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

Permissions

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


Communities
Leadership Community
Topics
Top Articles
Are you Being the Best Manager You Can Be?
Are you Being the Best Manager You Can Be?
Options
Jessica Carter posted 3/14/2016 10:15 AM
1. Talk less, listen more
Often we get a clearer understanding of our own goals, ambitions and weaknesses by talking them through. So try this: stop talking at employees at review time. You'll get far more useful information if you just listen to what they have to say. With some people that might mean the occasional uncomfortable silence, but be patient and give them the opportunity to fill it.
2. Play to your (and your team's) strengths
Understanding your own strengths and weaknesses can really change how you coach and give feedback. Knowing your frame of reference ("I have high technical ability", "I have no problems conducting tricky negotiations") and recognizing differences in your team's abilities means you make your feedback more relevant for individual development.
3. Manage teams, not individuals
Performance reviews typically look at individuals, but managers are ultimately responsible for their team's performance. By identifying individual strengths and skills gaps, you can encourage team members with complementary skills to team up; promoting teamwork, providing learning opportunities, and increasing the likelihood of project successes.
Are You Being the Best Manager You Can Be?
http://www.cornerstoneondemand.com
We believe that to be the best leader you can be, you need to be a fearless, bold, effective coach on a daily basis. Aspirational, right? The path to greatness seldom runs smoothly though, so here are a few strategies to get you started.
Like
2
Tags:
Featured
Manager
Cancel
Reply

Topic Details Page

With this enhancement, a new **Filter by Tag** drop-down is now available on the Topic Details page. In addition, the list of postings now displays all of the tags that are associated with each posting.

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
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
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

Filter by Tag

The **Filter by Tag** filter displays the top 10 most popular tags for the topic. This filter is only available if there is at least one tag used within the topic's postings. The system determines tag popularity by the number of postings with which the tag is associated.

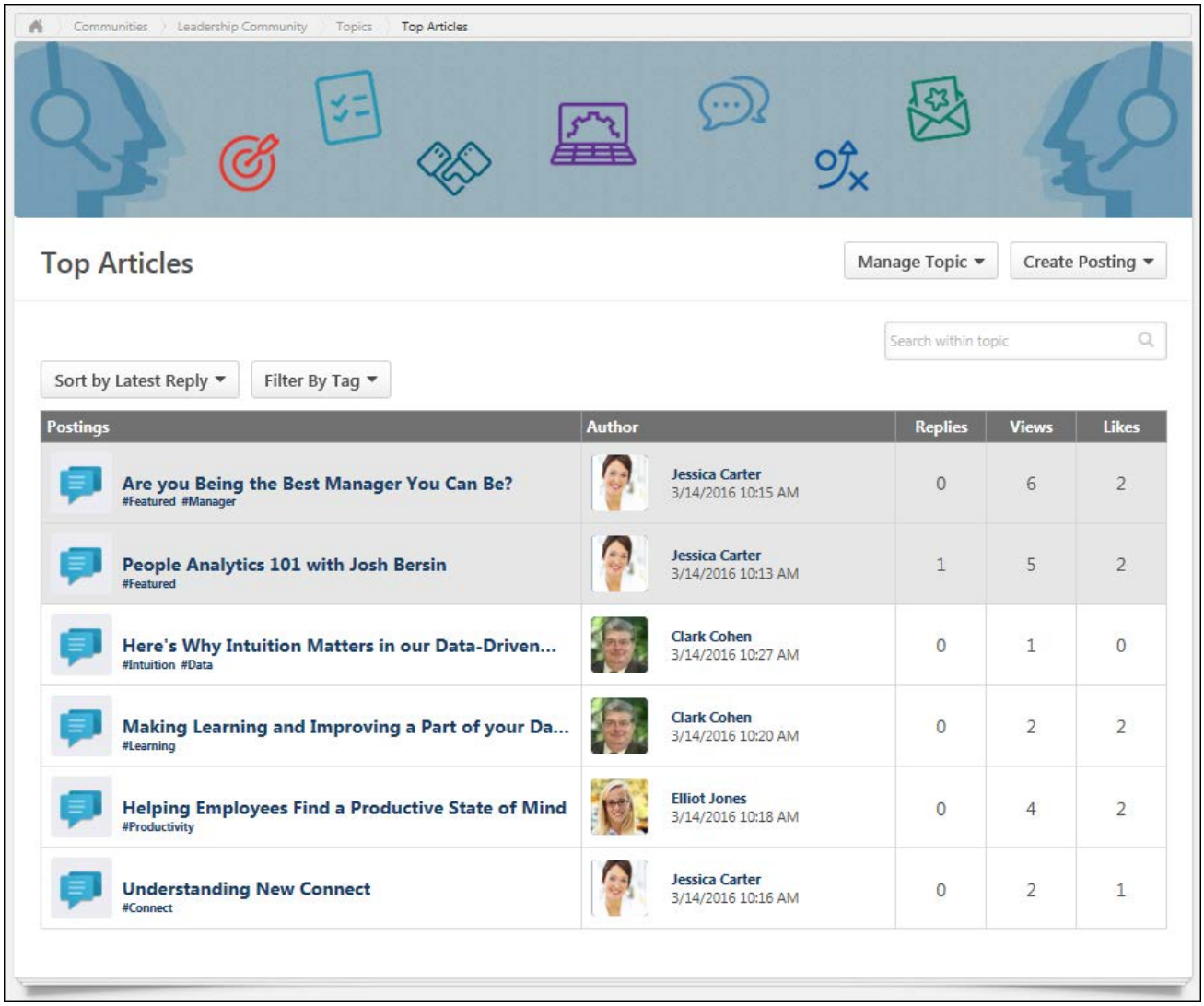
If there are more than 10 tags used within the topic, then a **More Tags** option is available within the drop-down. When this option is selected, a Select Tag pop-up opens, which displays all of the tags that are used within the topic.

If a tag is selected, then only postings that are associated with the selected tag are displayed. Users can select system-defined or user-defined tags, and only one tag can be selected. This filter is only applied to the selected topic and does not include postings within any subtopics. The selected tag appears to the right of the **Filter by Tag** filter. To remove the tag filter, click the Remove icon to the right of the tag name.

Tag Display

If a posting is associated with a tag, then the tag is displayed below the posting title. Only one row of tags are displayed; additional tags are only visible when viewing the posting. When filtering by tag, the filtered tag is displayed first if the posting is associated with the tag. Then, system tags are displayed before user-defined tags.

Users can click one of the tags to initiate a search within Global Search for all postings that contain the selected tag. Users can only view postings which they can access. ***Note:*** *The ability to click a posting tag to initiate a search is only available if the ability to search for Connect postings by tag is enabled via Search Preferences.*



Global Search - Connect Postings

With this enhancement, users can create and add custom tags to a posting. Global Search can be configured to allow users to refine their search by posting tags. In addition, the search results now display all of the tags that are associated with each posting.

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

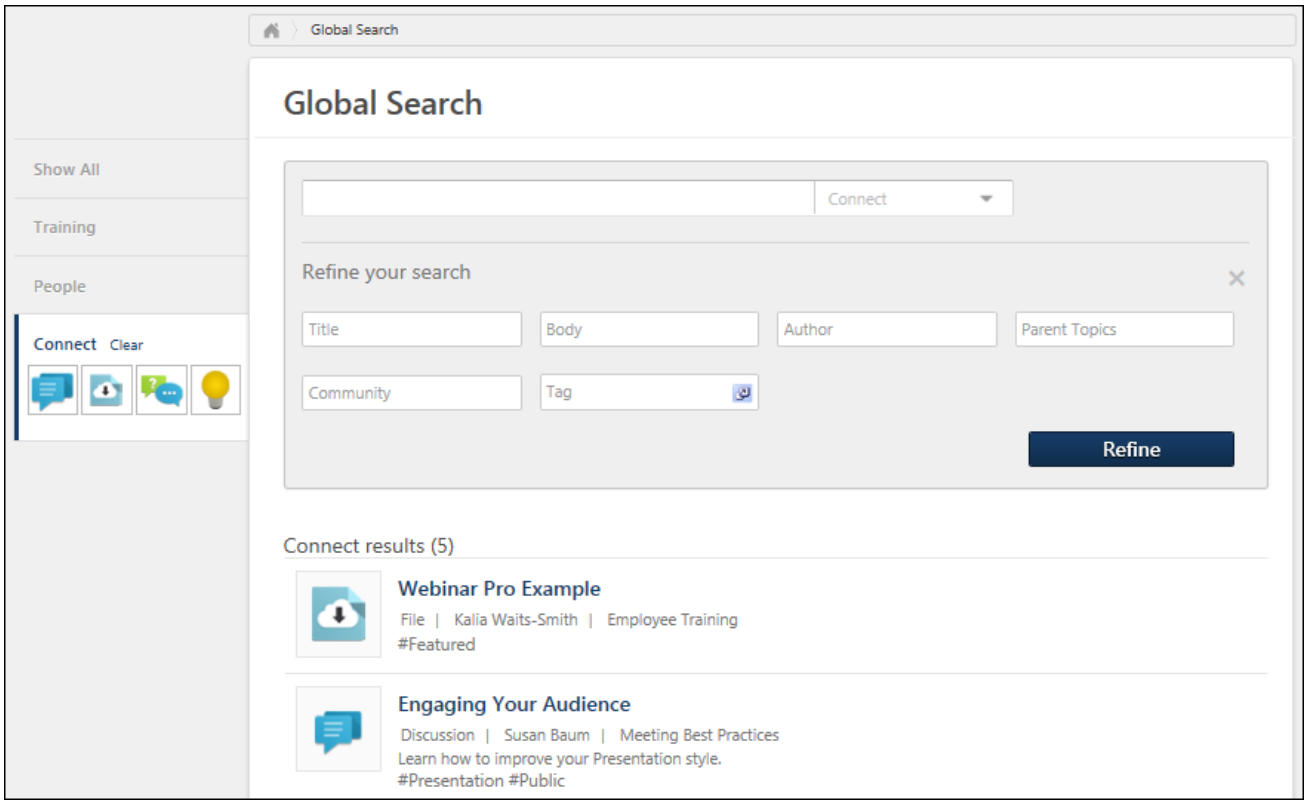
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Search - Connect	Grants ability to search for Knowledge Bank and community postings via Global Search. This permission cannot be constrained. The user's ability to view a posting is determined by the user's ability to view the posting's Knowledge Bank or community topic. This is an end user permission. The availability of this permission is controlled by a backend setting.	New Connect

When searching for connect postings, users can enter a posting tag in the search field, and Global Search will return postings that are associated with the tag.

When enabled, users can click the **Tags** filter option to open a pop-up window, in which users can select a system-defined or user-defined tag. When a tag is selected and a search is initiated, only postings that are associated with the selected tag are displayed.

When viewing a Connect posting in the search results, up to five of the tags associated with a posting are displayed below the posting details. When filtering by tag, the filtered tag is displayed first if the posting is associated with the tag. Then, system tags are displayed before user-defined tags. Users can click one of the tags to initiate a search within Global Search for all postings that contain the selected tag. Users can only view postings which they can access. ***Note:*** *The ability to click a posting tag to initiate a search is only available if the ability to search for Connect postings by tag is enabled via Search Preferences.*


Global Search
Global Search
Show All
Training
People
Connect Clear
Connect
Refine your search
Title
Body
Author
Parent Topics
Community
Tag
Refine
Connect results (5)
Webinar Pro Example
File | Kalia Waits-Smith | Employee Training
#Featured
Engaging Your Audience
Discussion | Susan Baum | Meeting Best Practices
Learn how to improve your Presentation style.
#Presentation #Public

Community Main Tab - Popular Tags

Within a community, a Popular Tags panel is now available on the Main tab. This panel is only available when tags are enabled. Also, this panel is not displayed if there are no tags within a community.

To access a community, go to CONNECT > COMMUNITIES. Then, click the community title.

Permissions

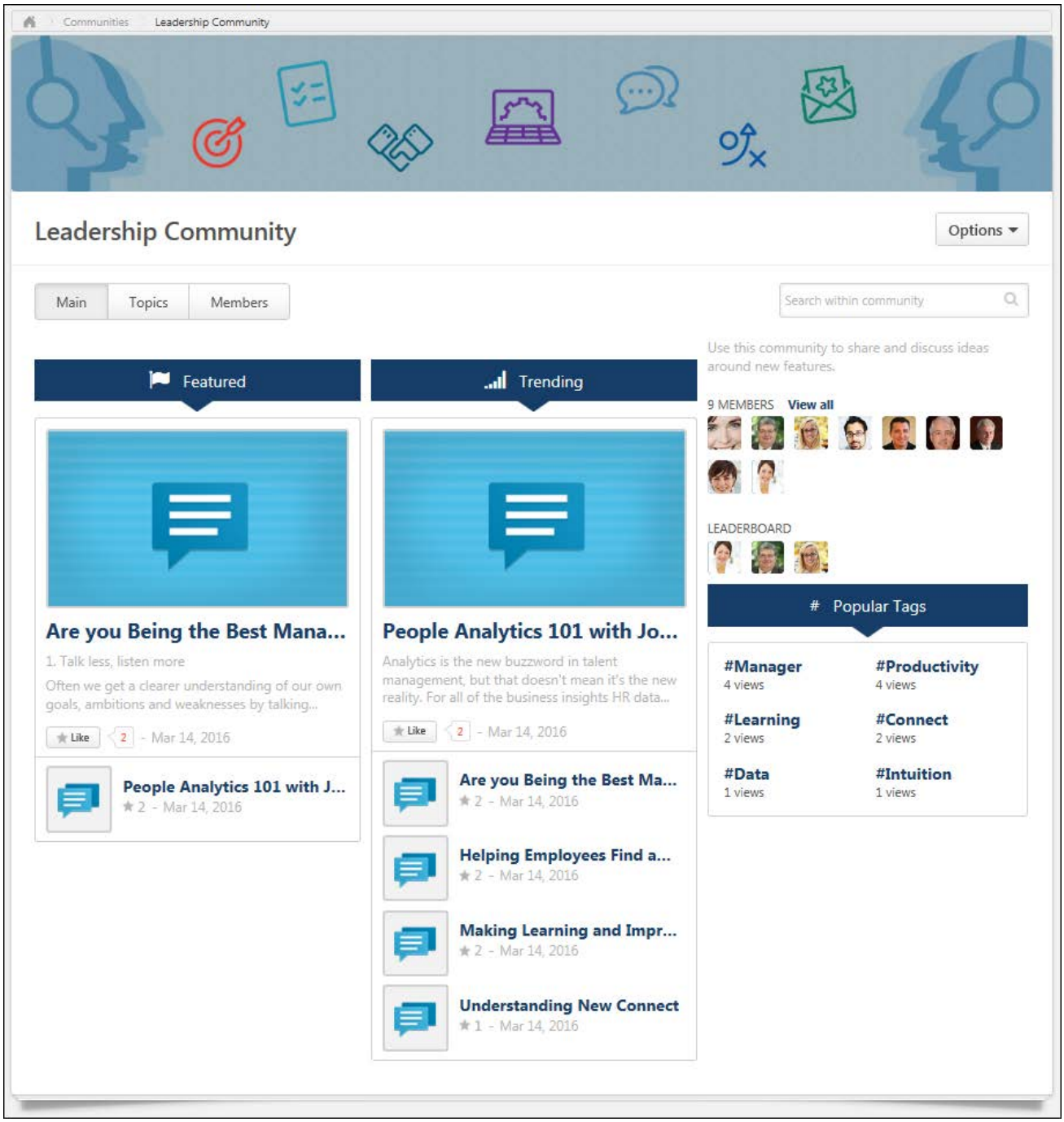
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. 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
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

Popular Tags Panel

The Popular Tags panel displays the most popular tags that are being used within the community. The system determines tag popularity by the number of times any posting that contains the tag is viewed within the community. System-defined tags are not included in the panel. This panel is updated every three hours. This panel is only available when tags are enabled, and this panel is not displayed if there are no tags within a community.

Below each tag, the total number of times a posting that contains the tag has been viewed across the entire community. This calculation includes all postings in the community, even if the user is not able to view the posting.

Click a tag to initiate a search within Global Search for all postings that contain the selected tag. Users can only view postings which they can access. ***Note:*** *The ability to click a posting tag to initiate a search is only available if the ability to search for Connect postings by tag is enabled via Search Preferences.*


Communities
Leadership Community
Leadership Community
Options
Main
Topics
Members
Search within community
Use this community to share and discuss ideas around new features.
Featured
Trending
9 MEMBERS View all
LEADERBOARD
Are you Being the Best Mana...
1. Talk less, listen more
Often we get a clearer understanding of our own goals, ambitions and weaknesses by talking...
Like 2 - Mar 14, 2016
People Analytics 101 with J...
2 - Mar 14, 2016
People Analytics 101 with Jo...
Analytics is the new buzzword in talent management, but that doesn't mean it's the new reality. For all of the business insights HR data...
Like 2 - Mar 14, 2016
Are you Being the Best Ma...
2 - Mar 14, 2016
Helping Employees Find a...
2 - Mar 14, 2016
Making Learning and Impr...
2 - Mar 14, 2016
Understanding New Connect
1 - Mar 14, 2016
Popular Tags
#Manager
4 views
#Productivity
4 views
#Learning
2 views
#Connect
2 views
#Data
1 views
#Intuition
1 views

Learning Community Main Tab - Course Ratings

Prior to this enhancement, the Course Ratings panel was displayed on the Main tab of a learning community even if no course ratings were available for members of the learning community.

With this enhancement, the Course Ratings panel is only displayed on the Main tab of a learning community if there is at least one course rating available to the user.

To access a community, go to CONNECT > COMMUNITIES. Then, click the community title.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page. Based on permission constraints, administrators with this permission can create and delete topics and subtopics. Administrators with this permission can view all communities, topics, sub-topics and postings, regardless of permission constraints. In addition, administrators can add a posting to the Course Catalog. 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
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

Core

Data Load Wizard - Duplicate User Prevention

This enhancement to the Data Load Wizard provides identification of duplicate user records for the Link - Duplicate User Prevention enhancement. *See* **Link - Duplicate User Prevention** on page 122 *for additional information.*

When an organization using Link loads new users using the Data Load Wizard, the system can be configured to determine whether the new users are similar to existing user records. This is done in order to prevent the same user from being added to the system more than once.

When loading user using the Data Load Wizard - User Load for Link, the system now determines whether the user record is potentially a duplicate user record:

- If the user record is determined to be unique, then the user is added as a new user.
- If the user record is determined to be a potentially duplicate user record, then the user record is created in a pending state.
  - The user record information is added to the Pending User Records page. *See* **Pending User Records** on page 130 *for additional information.*
  - The following error description is displayed in the Excel Error Report for the pending user record: This user was found to be a potential duplicate of an existing user record. As a result, the user was added in a pending state. This user will not have access to Cornerstone until they are reconciled, which can be done by a system administrator from the 'Admin > Core Functions > Pending User Records' page.

If pending user records are identified, administrators should navigate to the Pending User Records page to take action on the prevented duplicate users.

To start the Data Load Wizard, go to ADMIN > TOOLS > CORE FUNCTIONS > DATA LOAD WIZARD, and then click **Load Data**. The Data Load Wizard opens.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Data Load Wizard - Users	Enables administrator to load users. This permission also enables administrators to track data loads and manage data load templates. This is an administrator permission.	Data Load Wizard

Implementation

This functionality is only available to organizations using Link and the Data Load Wizard. This functionality is controlled by a backend setting, which is disabled by default.

Data Load Wizard - Historical Effective Dating

This enhancement to the Data Load Wizard provides support for loading users into the system with an effective date. *See* **Link - Historical Effective Dating for User Data** on page 133 *for additional information.*

With this enhancement, when loading users into the system using the Data Load Wizard, an As of Date can now be associated with a user record. By setting an effective date for a user record, administrators can set changes that are effective in the past and in the future via the Data Load Wizard.

Effective dating is applied to the entire record. It cannot be applied on a field-by-field basis when loading data using the Data Load Wizard.

The As of Date field is now available in the template when loading user data. This field accepts date values.

Backdating user data before 1901 is not supported.

Currently, the Data Load Wizard does not support adding a user with multiple effective dated records within the same load file. If a user has multiple effective dated records, the records must be loaded in separate files.

To start the Data Load Wizard, go to ADMIN > TOOLS > CORE FUNCTIONS > DATA LOAD WIZARD, and then click **Load Data**. The Data Load Wizard opens. Select the **Users** option and click **NEXT**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Data Load Wizard - Users	Enables administrator to load users. This permission also enables administrators to track data loads and manage data load templates. This is an administrator permission.	Data Load Wizard

Implementation

Upon release, this functionality is automatically enabled for all organizations using Link and the Data Load Wizard.

In order to purchase Link or the Data Load Wizard, please contact Sales or your Client Executive.

Headcount Planning

Headcount Planning Overview

Headcount Planning enables efficient, enterprise-wide collaboration to identify the number and mix of employees that will be needed to achieve the organization's business objectives in the future. Headcount Planning controls access to sensitive information, includes built-in versioning and error tracking, and provides a seamless approval and consolidation workflow. The interface is designed specifically for the headcount planning process, rather than having to use a generalized spreadsheet.

Use Cases

Finance requires headcount plans from business managers to account for their talent requirements and to prepare accurate budget forecasts. It is a logistical challenge to coordinate so many business managers, and also to consolidate their responses into one single headcount plan. Traditionally, Finance has created, shared, and collected spreadsheets for each business manager, which is a tedious and error-prone way of gathering this information.

The Talent/Human Resources (HR) Department uses headcount plans to strategize how to best meet the organization's projected talented needs. With visibility into expected talent gaps, HR can decide when and how to develop talent internally and/or hire talent externally.

Considerations

Headcount Planning utilizes Position Management and requires accurate position instance data about the organization, including all active position instances and any relationships between those position instances, as well as all position instance attributes and any relationships between those attributes. This data will represent the baseline on which plans are created. Any changes to position instance data can be updated via a scheduled data feed or a data load.

Implementation

The availability of this functionality is controlled by backend settings, which are disabled by default and require a work order to enable. Contact Global Product Support to enable this functionality. This product also requires technical projects. Please contact your Client Success Manager for details.

Glossary

- **Attribute** - A characteristic of a position instance, such as its location, cost center, or grade.
- **Co-Planners** - For a given plan or subplan, a co-planner can take planning actions and submit the plan. But the co-planner cannot add or remove co-planners or change the primary planner. There can be unlimited co-planners for a given plan.
- **Full-Time Equivalent** - The percentage of full-time that each position instance requires.
- **Headcount** - Headcount is the intention to fill a position instance with an employee and/or assign a cost to that position instance, depending on configuration. Headcount is not equivalent to a position instance.

- **Headcount Planning** - The process of estimating headcount needs for the future. Factors in the business needs, costs, and constraints, such as budget.
- **Position** - A “Job Type”, such as Truck Driver, Plant Operator, Engineer, etc.
- **Position Instance** - One specific “Job” within the “Job Type”. For example, an organization may have the position of Truck Driver, and then have 50 position instances of that Truck Driver comprising its Trucking division. Position instance is not equivalent to headcount.
- **Primary Planner** - For a given plan or subplan, the primary planner can take planning actions, submit plans, add or remove co-planners, and change the primary planner. There can only be one primary planner per plan.
- **Subplan** - One part of a larger headcount plan. A subplan, along with other subplans, rolls up into one larger plan in a headcount planning approval workflow. Subplans are assigned in a top-down direction and are completed/approved in a bottom-up direction.

Security

The following new permission applies to this functionality.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Work Force Planning - Administrator	Grants access to the Headcount Planning page. Users with this permission can also create new headcount plans for any part of the organization, as well as create subplans that have been assigned to them. Administrators can only view plans that they have created or to which they were assigned as a Co-Planner or Primary Planner This is an administrator permission.	Core Administration
Work Force Planning - Subplanner	Grants the ability to complete subplans that have been assigned to the user. Users with this permission cannot create new headcount plans or view all plans. They can only view plans that they create and plans in which they are assigned a role of Owner, Subplanner, or Co-Planner.	Core Administration

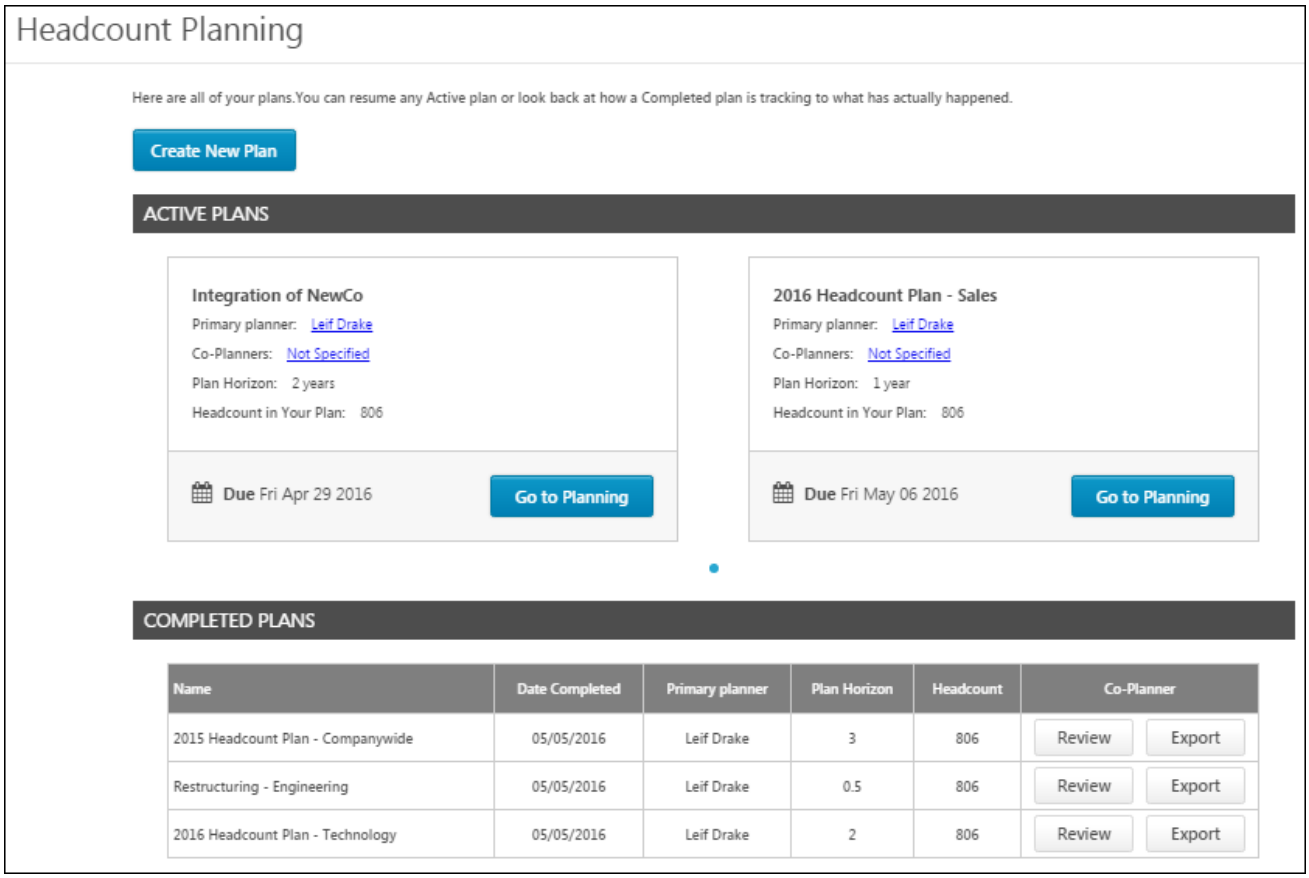
Headcount Planning Page - Overview

The Headcount Planning page is a dashboard that allows you to view a snapshot of headcount plans that are in progress or completed. You can also create new plans from this page.

To access the Headcount Planning page, go to PLANNING > HEADCOUNT PLANNING.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Work Force Planning - Administrator	Grants access to the Headcount Planning page. Users with this permission can also create new headcount plans for any part of the organization, as well as create subplans that have been assigned to them. Administrators can only view plans that they have created or to which they were assigned as a Co-Planner or Primary Planner This is an administrator permission.	Core Administration
Work Force Planning - Subplanner	Grants the ability to complete subplans that have been assigned to the user. Users with this permission cannot create new headcount plans or view all plans. They can only view plans that they create and plans in which they are assigned a role of Owner, Subplanner, or Co-Planner.	Core Administration



Create New Plan

Click **CREATE NEW PLAN** to create a new headcount plan. This opens the Create a Plan page. *See* **Create Plan - Create a Plan Page** on page 97 *for additional information.*

Note: *The* **CREATE NEW PLAN** *option is only available for users with permission to be plan administrators.*

Active Plans

This section displays plans that are currently active. If you have more than two active plans, you can scroll to the right to view additional plans.

The following information displays for each plan:

- **Plan Name** - This displays the title of the plan, which is defined when the plan is created.
- **Primary Planner** - This displays the name of the user who is designated by the plan creator to be the primary planner. For the user that is the primary planner, the name of the primary planner will be clickable and can be edited. Co-planners will not be able to click and edit the primary planner.
- **Co-Planners** - This displays the name of the co-planner. For the user that is the primary planner, the name will be clickable and can be edited. For users that are co-planners, they will not be able to click and edit the co-planners
- **Plan Horizon** - This displays the amount of time that is being planned.

- **Headcount in Your Plan** - This displays the total headcount value in your organization at the time of plan creation. This number is a baseline and does not change when you add or subtract headcount in the plan itself.
- **Due Date** - This displays the date on which your plan is due. This date is for informational purposes only, and the plan will not be rescinded or closed automatically when this date is reached.

To open the plan, click **GO TO PLANNING**.

Completed Plans

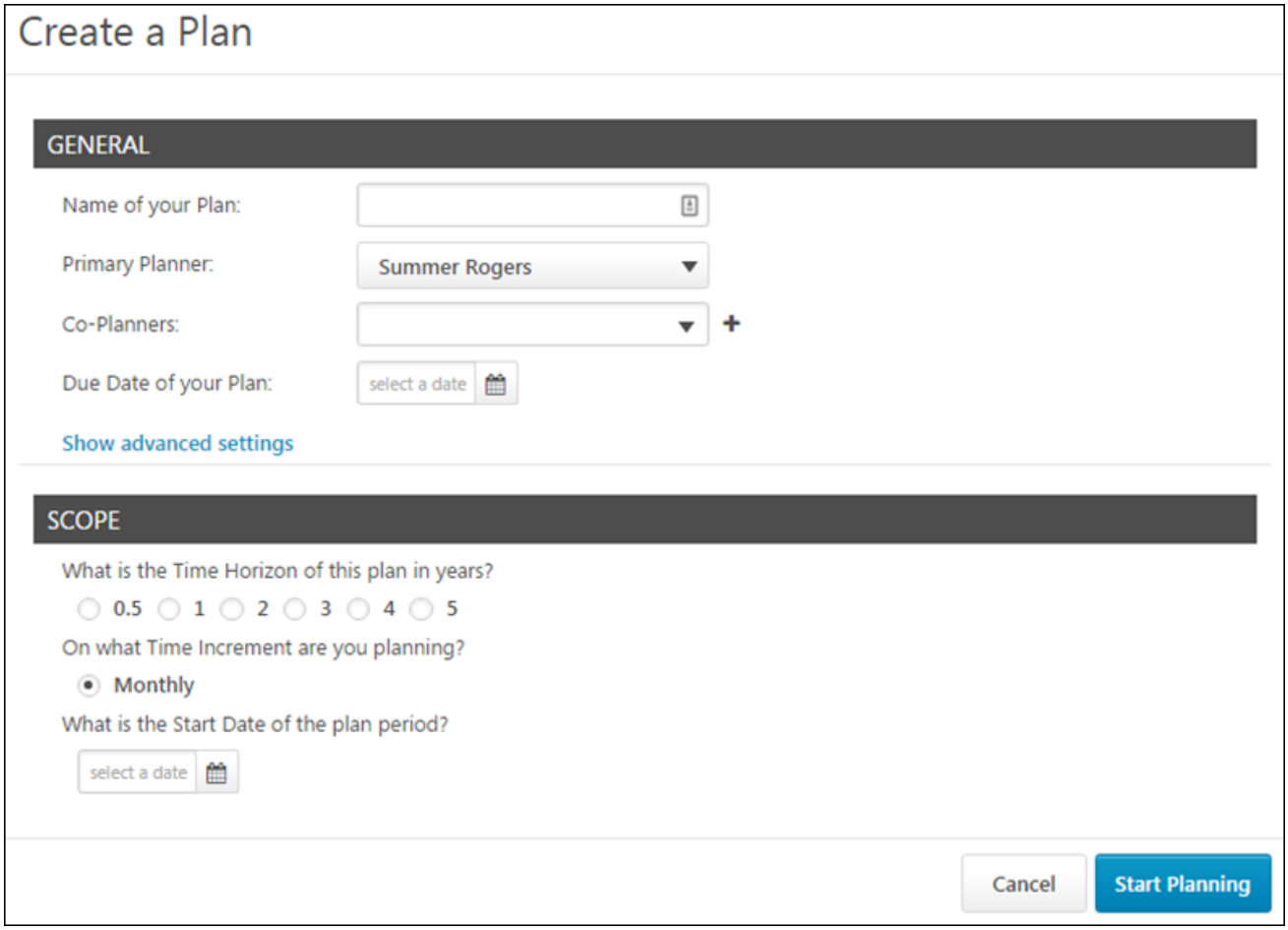
This section displays details about your completed plans. Plans are sorted by default by the date completed, with the most recently completed at the top.

The following information displays for completed plans:

- **Name** - This displays the title of the plan.
- **Date Completed** - This displays the date on which the plan was completed.
- **Primary Planner** - This displays the primary planner of the plan.
- **Plan Horizon** - This displays the plan horizon period in years.
- **Headcount** - This displays the total headcount value in your plan.
- **Actions** - The following actions are available:
  - **Review** - Click **REVIEW** to open a brief summary of the submitted plan. The summary displays the primary planner and the total headcount in the plan.
  - **Export** - Click **EXPORT** to export the plan to a .csv file. The rows of the table will be all position instances for each time increment in the plan in separate rows. The columns will be the attributes of the position instance in each time increment.

Create Plan - Create a Plan Page

The Create a Plan page is the first step in creating a headcount plan. From this page, you will define general information about the plan, such as the name and due date. You will also define the time scope of the plan.



General

The following fields display in the General section:

- **Name of your Plan** - Enter the plan name. There is no character limit.
- **Primary Planner** - Select the primary planner from the users in the drop-down, which include the plan creator, the user who occupies the top most position instance in the plan, and possibly position instances at that highest level, depending on configuration. There can only be one primary planner per plan. This field is required and by default is the plan creator.
- **Co-Planners** - You can select any user in the portal. Select the user from the drop-down, and then click the plus icon to add the user as a co-planner. There can be unlimited co-planners per plan. This field is not required and, by default, there are no co-planners assigned.

- **Due Date of your Plan** - Click the **Select a Date** field to enter a due date. With the April '16 release, the due date is not recognized as a date that will trigger any actions, such as closing the plan. This field is not required.

Show Advanced Settings

The **Instructions** and **Description** fields will be visible in the Advanced Settings section for the April '16 release but will have no functionality for the plan. Any instructions or description entered in the fields will not appear in the plan.

Scope

The following fields display in the Scope section:

- **What is the Time Horizon of this plan in years?** - The time horizon is the total period of time for which the user intends to plan. Select one of the time horizon options. The options are in yearly increments, with 0.5 being six months.
- **On what Time Increment are you planning?** - This defines how the time horizon is broken up or segmented for planning purposes. Currently, the time increment is automatically defined as monthly. Additional options to define the increment as quarterly or annually may be added in a future release.
- **What is the Start Date of the plan period?** - This field allows you to define the start date of the time horizon. Click the **Select a Date** field to enter a start date. The date can be a current, future, or past date. For example, you select three years in the **Time Horizon** field. Then, you set the start date of the time horizon for June 2017. This would mean that the headcount plan would run from June 2017 to May 2020.

Start Planning/Cancel

Click **START PLANNING** to create your headcount plan. This saves the plan to the Active Plans section on the Headcount Planning homepage and opens the planning page.

Important Note: *Only click the* **START PLANNING** *button once. If you click it more than once, you will create a new plan each time you click the button.*

Click **CANCEL** to cancel creating the plan.

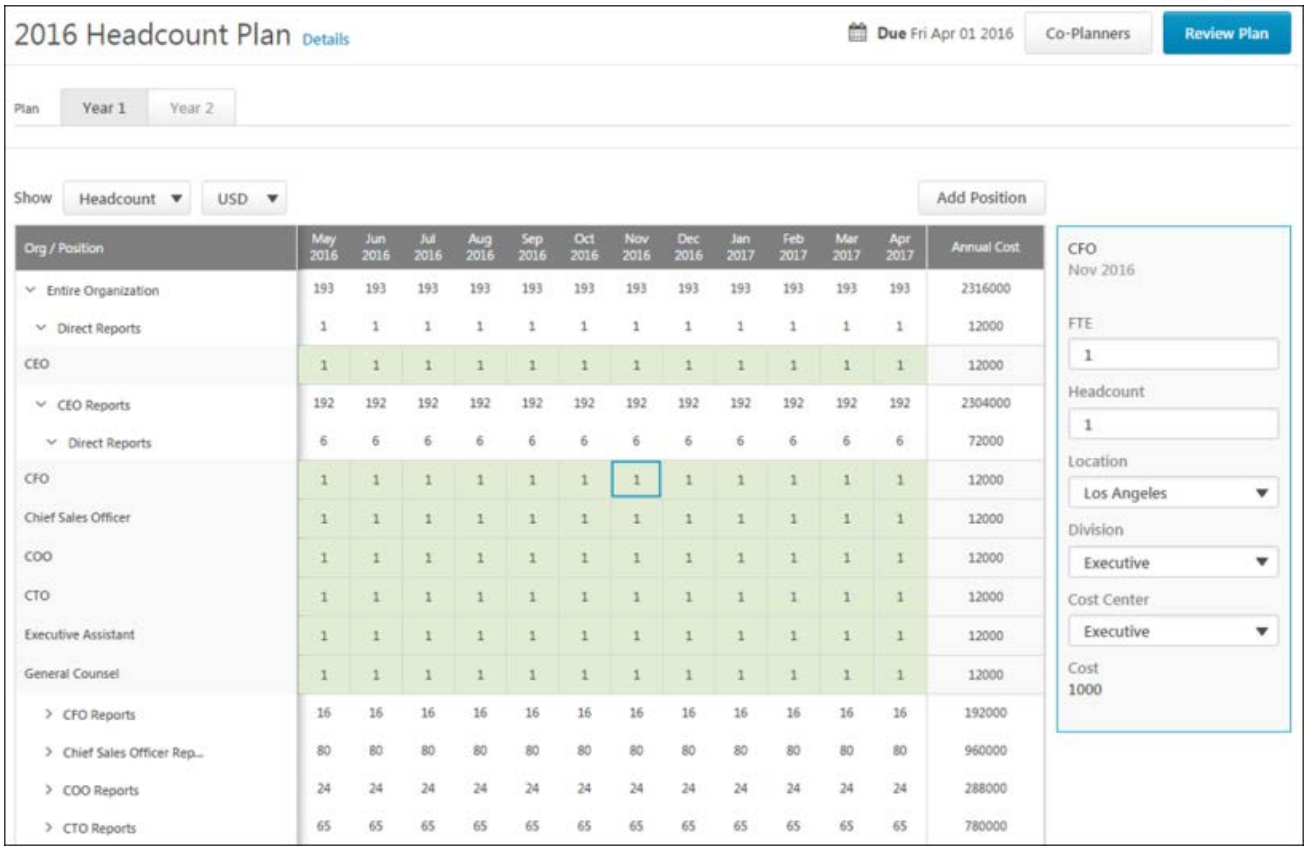
Create Plan - Planning Page

From the planning page, you can create and modify your headcount plan by predicting headcount needs for the plan period.

To access the planning page, click **START PLANNING** from the Create a Plan page. Or, click **GO TO PLANNING** from the Headcount Planning page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Work Force Planning - Administrator	Grants access to the Headcount Planning page. Users with this permission can also create new headcount plans for any part of the organization, as well as create subplans that have been assigned to them. Administrators can only view plans that they have created or to which they were assigned as a Co-Planner or Primary Planner This is an administrator permission.	Core Administration
Work Force Planning - Subplanner	Grants the ability to complete subplans that have been assigned to the user. Users with this permission cannot create new headcount plans or view all plans. They can only view plans that they create and plans in which they are assigned a role of Owner, Subplanner, or Co-Planner.	Core Administration

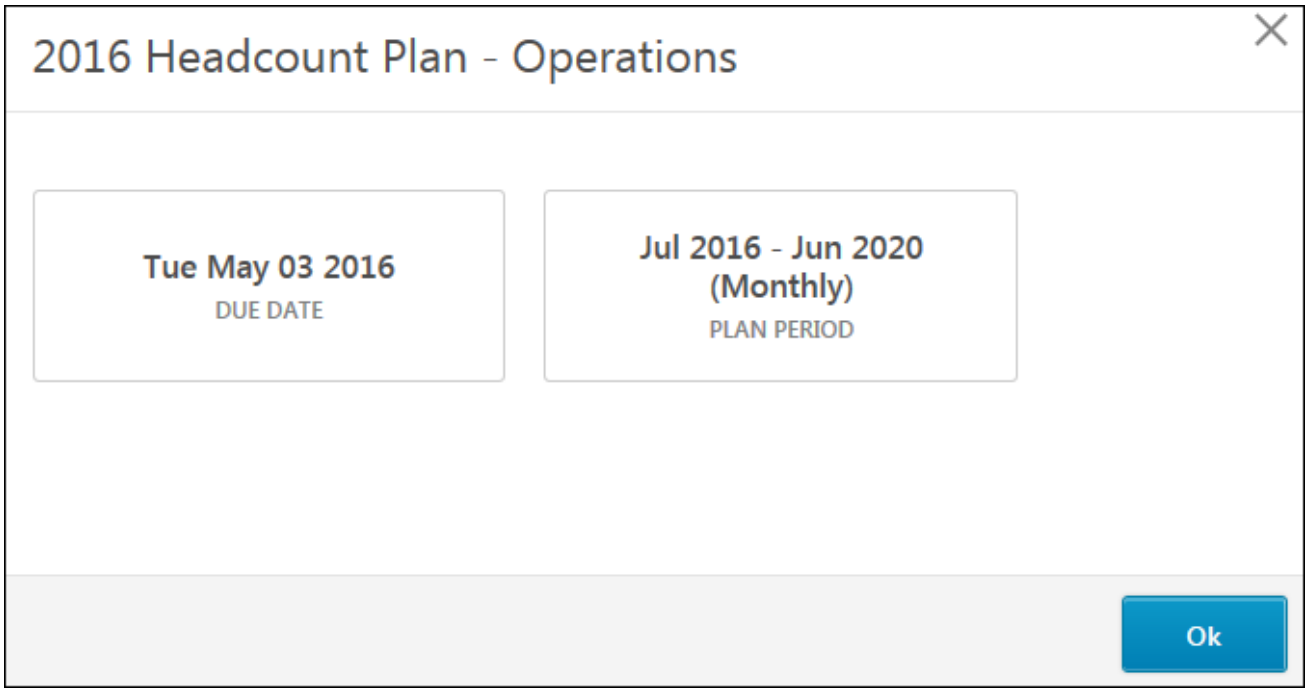


General Plan Information

The name of the plan and the plan due date displays at the top of the page. If a due date is not configured for the plan, then "Due Date Not Specified" displays.

Details

Click **Details** to view a pop-up that displays the plan due date and plan period.



Plan Year Tabs

The time horizon is separated into tabs. A separate tab displays for each year in the plan. Click a plan tab to view the headcount, FTE, and cost for the selected year.

Show

The following display options are available in the upper-left of the plan table:

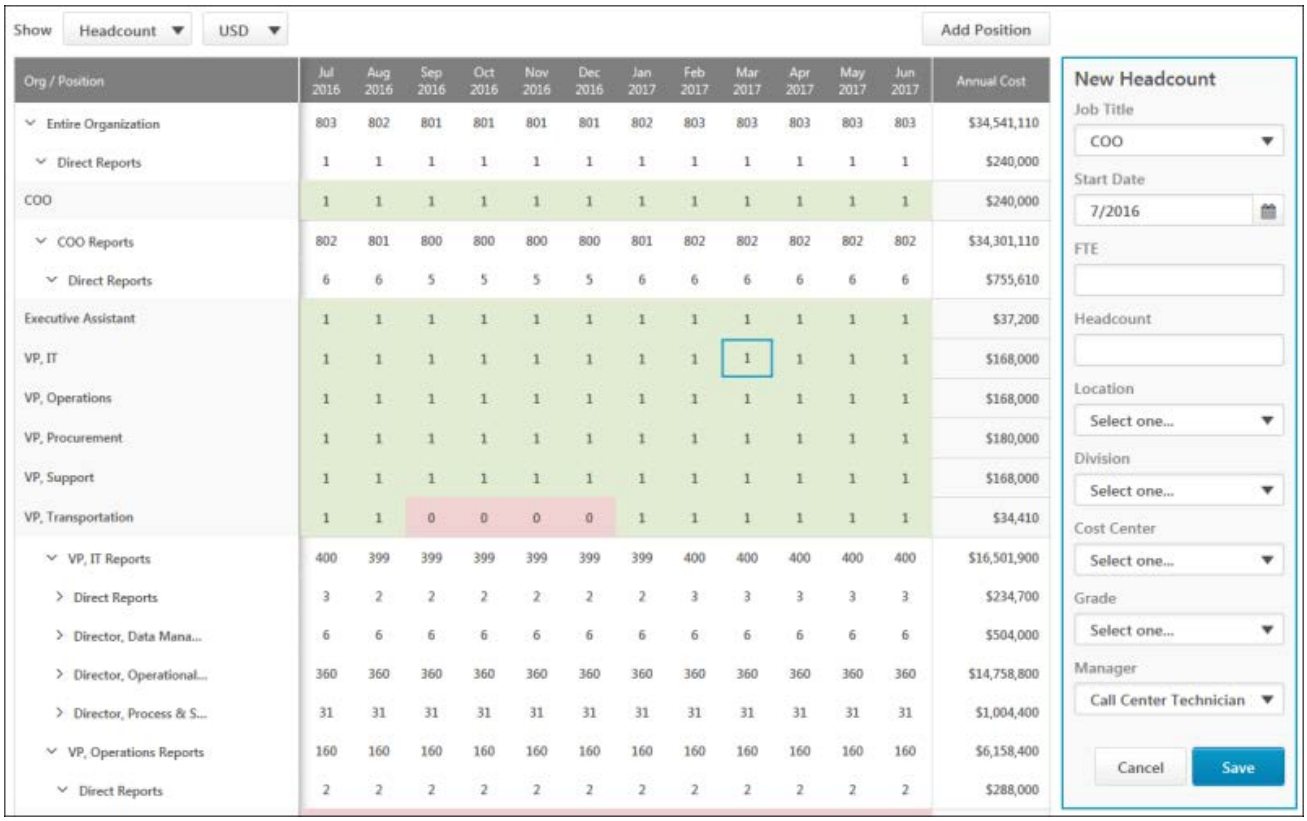
- **Headcount/FTE/Cost** - The first button to the right of **Show** allows you to determine which values display in the table. Select one of the following options:
  - **Headcount** - This option is selected by default. When this option is selected, you can view the projected headcount for each position instance.
  - **FTE** - When this option is selected, you can view the FTE value for each position instance and for each role.
  - **Cost** - When this option is selected, you can view the cost associated with each position instance. The cost fields cannot be modified directly. Cost is adjusted based on changes to headcount, FTE, or other attributes configured by the costing model uploaded during implementation.
- **Currency** - This option allows you to view the plan in the selected currency. For the April '16 release, only one currency can be imported and displayed.

Add Position (Instance)

You can add position instances to the plan. Position instances that are added cannot be deleted from the plan. Once the position instance is added, even if all position instances are changed to 0, the position instance will still appear as a row in the table.

To add a position instance:

1. Click **ADD POSITION**. This opens the New Headcount panel to the right of the plan table.
2. Complete the following required and optional fields:
   - **Job Title** - By default, the job title is the highest level position in the organization. You can select a different job title from the drop-down. The options that are available are the Position OUs in the portal or the options that were defined during implementation of Headcount Planning. This is a required field.
   - **Start Date** - By default, the start date is the first month in the planning period. You can select a different date as the start date. This is a required field.
   - **FTE** - Enter the FTE value. This is a required field. The acceptable values are 0 and 1 and any value in between within two decimal points. Decimal points round up. To enter a decimal, enter 0.[decimal number].
   - **Headcount** - Enter the headcount value, either 1 or 0. This is a required field.
   - **Location** - Select the location from the drop-down. The options that are available are the Location OUs in the portal or the options that were defined during implementation of Headcount Planning.
   - **Division** - Select the division from the drop-down. The options that are available are the Division OUs in the portal or the options that were defined during implementation of Headcount Planning.
   - **Cost Center** - Select the cost center from the drop-down. The options that are available are the Cost Center OUs in the portal or the options that were defined during implementation of Headcount Planning.
   - **Grade** - Select the grade from the drop-down. The options that are available are the Grade OUs in the portal or the options that were defined during implementation of Headcount Planning.
   - **Manager** - Select the position that will be the manager for the position. The options that are available are the Position OUs in the portal or the options that were defined during implementation of Headcount Planning.
3. Click **SAVE** to add the position instance to the plan. The new position instance will appear in the plan under the Direct Reports section for the option selected in the **Manager** field.



Plan Table

The plan table allows you to create the headcount plan for each position instance. The information that displays in the plan table depends on the option selected in the **Show** option. The following views are available:

- **Headcount** - This option is selected by default. When this option is selected, you can view the projected headcount for each position instance.
- **FTE** - When this option is selected, you can view the FTE values for each position instance.
- **Cost** - When this option is selected, you can view the cost associated with a position or position instance. The cost fields cannot be modified directly. Cost is adjusted based on changes to headcount or FTE. The FTE cost is calculated by multiplying the cost of a full-time position. For example, if FTE is changed to 0.5, then cost is halved.

Primary planners and co-planners see all position instances within the area of the organization in the plan that was assigned to them or in the plan they created themselves.

By default, all values in the starting increment are assumed to carry forward to all future increments in the plan.

Each time the plan is opened, the table displays the top level position instance, with the first level below expanded.

Org / Position	Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Annual Cost
Entire Organization	803	802	801	801	801	801	802	803	803	803	803	803	$34,541,110
Direct Reports	1	1	1	1	1	1	1	1	1	1	1	1	$240,000
COO	1	1	1	1	1	1	1	1	1	1	1	1	$240,000
COO Reports	802	801	800	800	800	800	801	802	802	802	802	802	$34,301,110
Direct Reports	6	6	5	5	5	5	6	6	6	6	6	6	$755,610
Executive Assistant	1	1	1	1	1	1	1	1	1	1	1	1	$37,200
VP, IT	1	1	1	1	1	1	1	1	1	1	1	1	$168,000
VP, Operations	1	1	1	1	1	1	1	1	1	1	1	1	$168,000
VP, Procurement	1	1	1	1	1	1	1	1	1	1	1	1	$180,000
VP, Support	1	1	1	1	1	1	1	1	1	1	1	1	$168,000
VP, Transportation	1	1	0	0	0	0	1	1	1	1	1	1	$34,410

Org/Position

This section displays the hierarchy of the position instance. The direct reports are the group of positions that report directly to the position above it. Indirect reports display below direct report grouping and are considered direct and indirect reports of a direct report. You cannot edit values in the rows for "Direct Reports" or "Indirect Reports."

Position Instances - Headcount

When viewing **Headcount** from the **Show** option, the table displays each segment of the time horizon as a separate column. You can only edit the position instance rows. Any values in the "Entire Organization" and "Direct Reports" rows cannot be modified. Any value in a row with the word "Reports" in it cannot be changed. Headcount can only be changed for a specific position instance.

To modify the position instance value:

1. Click the desired cell in the corresponding position instance row and time horizon column.
2. Delete the value or backspace over the value.
3. Enter the new value of either 1 or 0. The value and color of the current and all subsequent cells in the row changes to green if the value is 1, and it changes to red if the value is 0. ***Note:*** *If the headcount value is changed to 0, then FTE and cost are also changed to 0. The FTE cannot be edited when the headcount value is 0.*
4. Click away from the cell to automatically update the table with the new value.

Position Instances - FTE

When viewing **FTE** from the **Show** option, the table displays each segment of the time horizon as a separate column. You can only edit the position instance rows. These rows are colored in red or green. The values in the "Direct Reports" or "Indirect Reports" rows cannot be modified.

To modify the FTE value:

1. Click the desired cell in the corresponding FTE row and time horizon column.
2. Delete the value or backspace over the value.
3. Enter the new value. The acceptable values are 0 and 1 and any value in between within two decimal points. Decimal points round up. To enter a decimal, enter 0.[decimal number]. The value and color of the current and all subsequent cells in the row changes to green if the value is 0.01 or greater, and it changes to red if the value is 0.
4. Click away from the cell to automatically update the table with the new value.

Annual Cost

This column displays the sum of the cost of the position instances for all increments in the year displayed. The cost will adjust based on changes to headcount and FTE or other position attributes as defined by the costing model that you uploaded. For example, if you change the headcount from 1 to 0 for a position instance, then the cost will decrease (likely to 0 but is dependent upon how costing is configured) based on the removal of headcount.

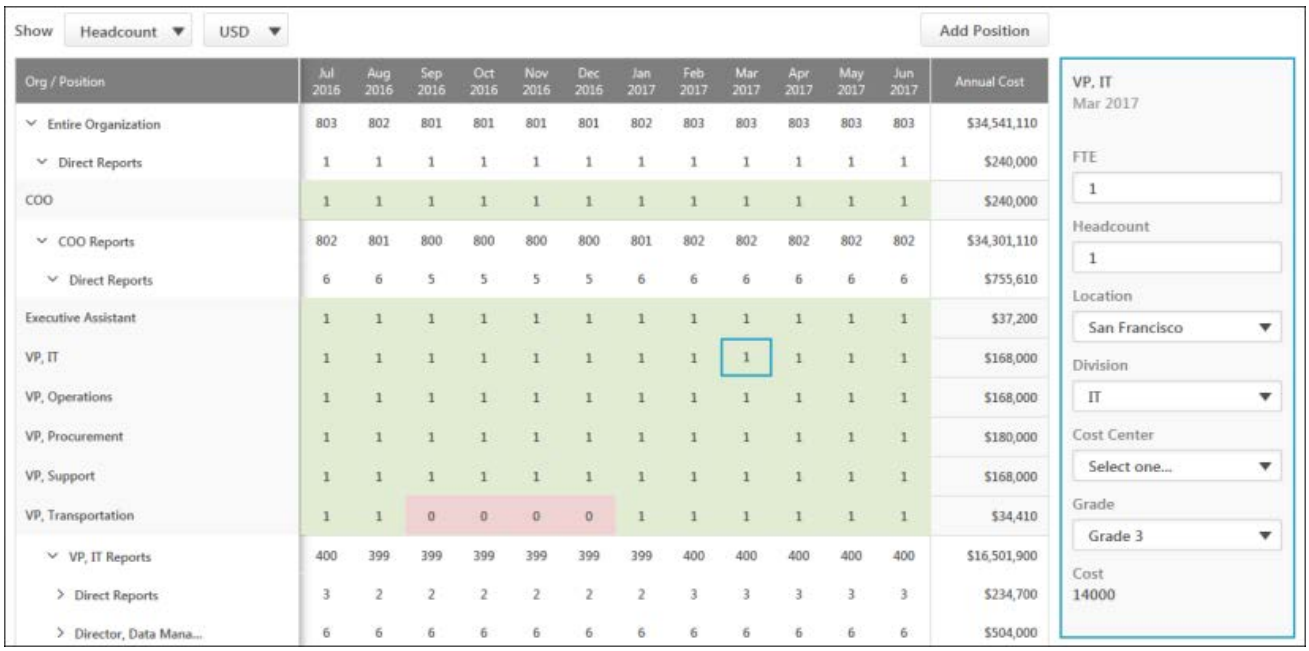
Edit Existing Position (Instance) Attributes

You can change the attributes for existing positions by clicking within a position instance or FTE. This opens the attributes panel to the right of the table. The position title and place in the time horizon displays at the top.

The following additional fields and information displays for existing position instances:

- **FTE** - The FTE value is the percentage of full-time that each position instance requires.. This is a required field. The acceptable values are 0 and 1 and any value in between within two decimal points. Decimal points round up. To enter a decimal, enter 0.[decimal number].
- **Headcount** - Enter a value of 1 or 0. The value and color of the current and all subsequent cells in the row changes to green if the value is 1, and it changes to red if the value is 0. ***Note:*** *If the headcount value is changed to 0, then FTE and cost are also changed to 0. Position attributes, including FTE, cannot be edited when the headcount value is 0.*
- **Location** - Select a location from the drop-down. The options that are available are the Location OUs in the portal or the options that were defined during implementation of Headcount Planning. The selected location will apply to the selected increment and all subsequent position increments in the plan. For example, if you change the location to Los Angeles in the second month of a 2-year plan, then months 2-24 will have the location of Los Angeles.
- **Division** - Select the division from the drop-down. The options that are available are the Division OUs in the portal or the options that were defined during implementation of Headcount Planning.
- **Cost Center** - Select the cost center from the drop-down. The options that are available are the Cost Center OUs in the portal or the options that were defined during implementation of Headcount Planning.

- **Grade** - Select the grade from the drop-down. The options that are available are the Grade OUs in the portal or the options that were defined during implementation of Headcount Planning.
- **Cost** - This displays the cost value for the position instance or FTE. The cost will adjust based on changes to headcount and FTE. For example, if you change the headcount from 1 to 0 for a position instance, then the cost will decrease (likely to 0 but is dependent upon how costing is configured) based on the removal of headcount.



Org / Position	Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Annual Cost
Entire Organization	803	802	801	801	801	801	802	803	803	803	803	803	$34,541,110
Direct Reports	1	1	1	1	1	1	1	1	1	1	1	1	$240,000
COO	1	1	1	1	1	1	1	1	1	1	1	1	$240,000
COO Reports	802	801	800	800	800	800	801	802	802	802	802	802	$34,301,110
Direct Reports	6	6	5	5	5	5	6	6	6	6	6	6	$755,610
Executive Assistant	1	1	1	1	1	1	1	1	1	1	1	1	$37,200
VP, IT	1	1	1	1	1	1	1	1	1	1	1	1	$168,000
VP, Operations	1	1	1	1	1	1	1	1	1	1	1	1	$168,000
VP, Procurement	1	1	1	1	1	1	1	1	1	1	1	1	$180,000
VP, Support	1	1	1	1	1	1	1	1	1	1	1	1	$168,000
VP, Transportation	1	1	0	0	0	0	1	1	1	1	1	1	$34,410
VP, IT Reports	400	399	399	399	399	399	399	400	400	400	400	400	$16,501,900
Direct Reports	3	2	2	2	2	2	2	3	3	3	3	3	$234,700
Director, Data Mana...	6	6	6	6	6	6	6	6	6	6	6	6	$504,000

Co-Planners

Click **CO-PLANNERS** to edit the co-planners for the plan. Co-planners will have access to Headcount Planning in order to view and edit the plan.

Review/Submit Plan

Click **REVIEW PLAN** to review and submit the plan. This opens the Plan Summary page. From here, you can view the primary planner and the total headcount at the time of the plan creation.

To submit the headcount plan, click **SUBMIT**. This moves the plan from the Active Plans section on the Headcount Planning page to the Completed Plans section. Once a plan is submitted, it cannot be re-opened or modified. The plan can still be exported to a .csv file by clicking **EXPORT** from the Headcount Planning page.

Concurrent Editing of Plan

When more than one planner is editing a plan, the most recently saved updates overwrite any existing value.

Insights Career Mobility

Career Mobility Overview

The Career Mobility Insight empowers managers to create data driven career paths and development plans for individuals to realize their potential. Organizations will gain insight on internal career paths and the actions that drove historically successful successors along their paths. Furthermore, this will prescribe users with development plan action items that may help new successors mobilize in their career paths.

Use Cases

- An organization has high attrition for a particular position. Since lack of career mobility typically drives employees out of a company, you want to see all career paths that have started from that position. Then, you can generate the data you need to solve the attrition problem with support to generate career mobility for employees in that position. You can then output that data and share it with the appropriate internal stakeholders, such as managers of the starting position.
- An organization wants to understand all career paths between two particular positions. They use a start and end point to analyze all the paths that have taken place between both points and the actions necessary to mobilize talent from the starting position to the goal position. Then, they output the data and share it with the appropriate internal stakeholders, such as managers of the starting position.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Insights Dashboard	Allows user to access Insights Dashboard. This permission cannot be constrained.	Core

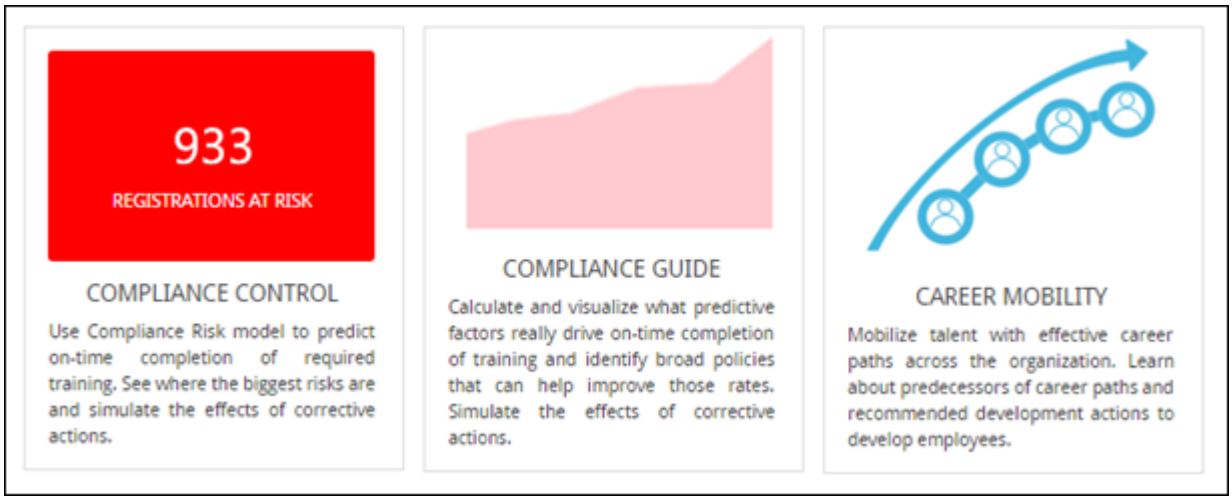
Insights Main Dashboard

The Career Mobility Insight is accessed from the Insights Main Dashboard. The Career Mobility Insight empowers managers to create data driven career paths and development plans for individuals to realize their potential. Organizations will gain insight on internal career paths and the actions that drove historically successful successors along their paths. Furthermore, this will prescribe users with development plan action items that may help new successors mobilize in their career paths.

To access the Career Mobility Insight, click the Career Mobility card on the Insights Main Dashboard. This opens the **position search page**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Insights Dashboard	Allows user to access Insights Dashboard. This permission cannot be constrained.	Core



Position Search Page

The position search page allows you to select the starting position and the goal position for the career path.

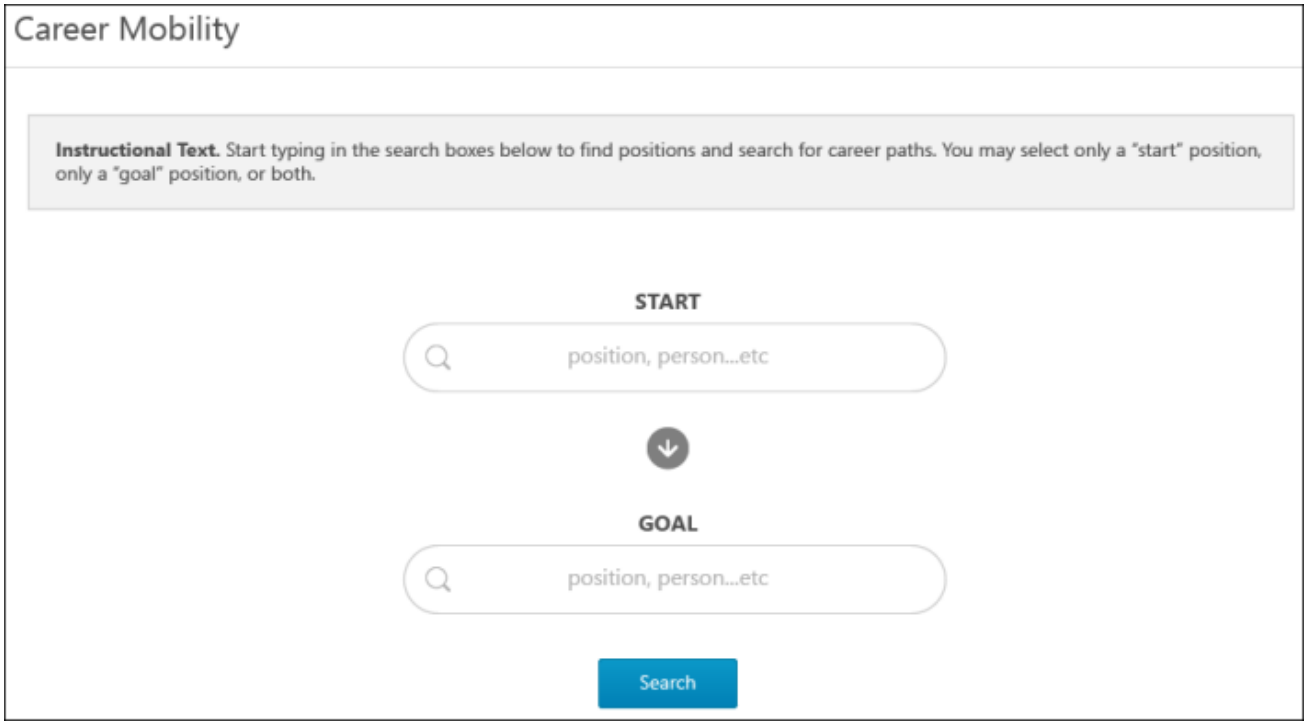
The user may select a start position and no goal position if they want to search for all career paths stemming off of a single position. Or, a user may select a start and goal position to search for all career paths that stream between two positions. A user cannot, however, just select a goal position by itself to conduct a search.

- Starting Position - The position at the beginning of the career path.
- Goal Position - The position at the end of the career path.

To access the position search page, click the Career Mobility card on the **Insights Main Dashboard**.

Permissions

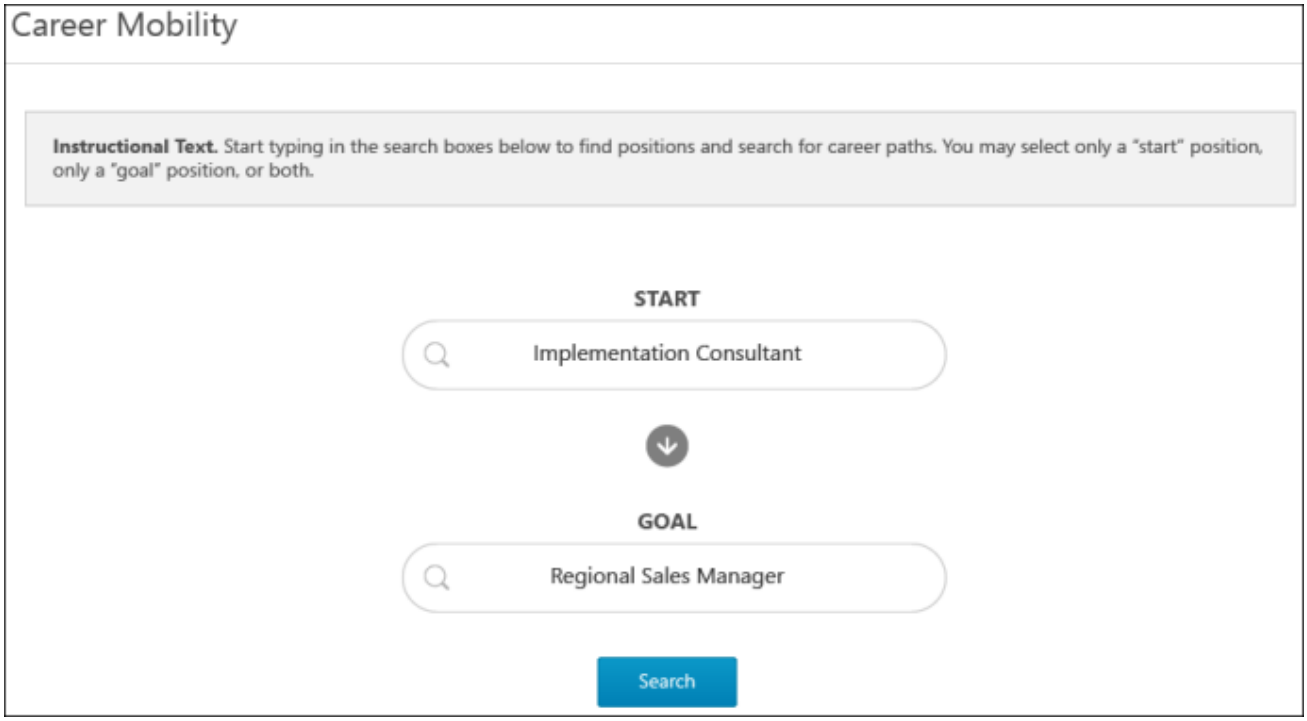
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Insights Dashboard	Allows user to access Insights Dashboard. This permission cannot be constrained.	Core



To select the positions:

1. Enter text in the **Start** field. Predictive search results appear as you type.
2. Select the starting position from the list. Positions that do not have enough data to suggest a potential path cannot be selected.

3. Enter text in the **Goal** field. Predictive search results appear as you type, displaying the positions the most relevant positions in descending order.
4. Select the goal position from the list. Positions that do not have enough data to suggest potential actions to take to succeed to the goal position cannot be selected.
5. Click **SEARCH**. This opens the career path search results page.



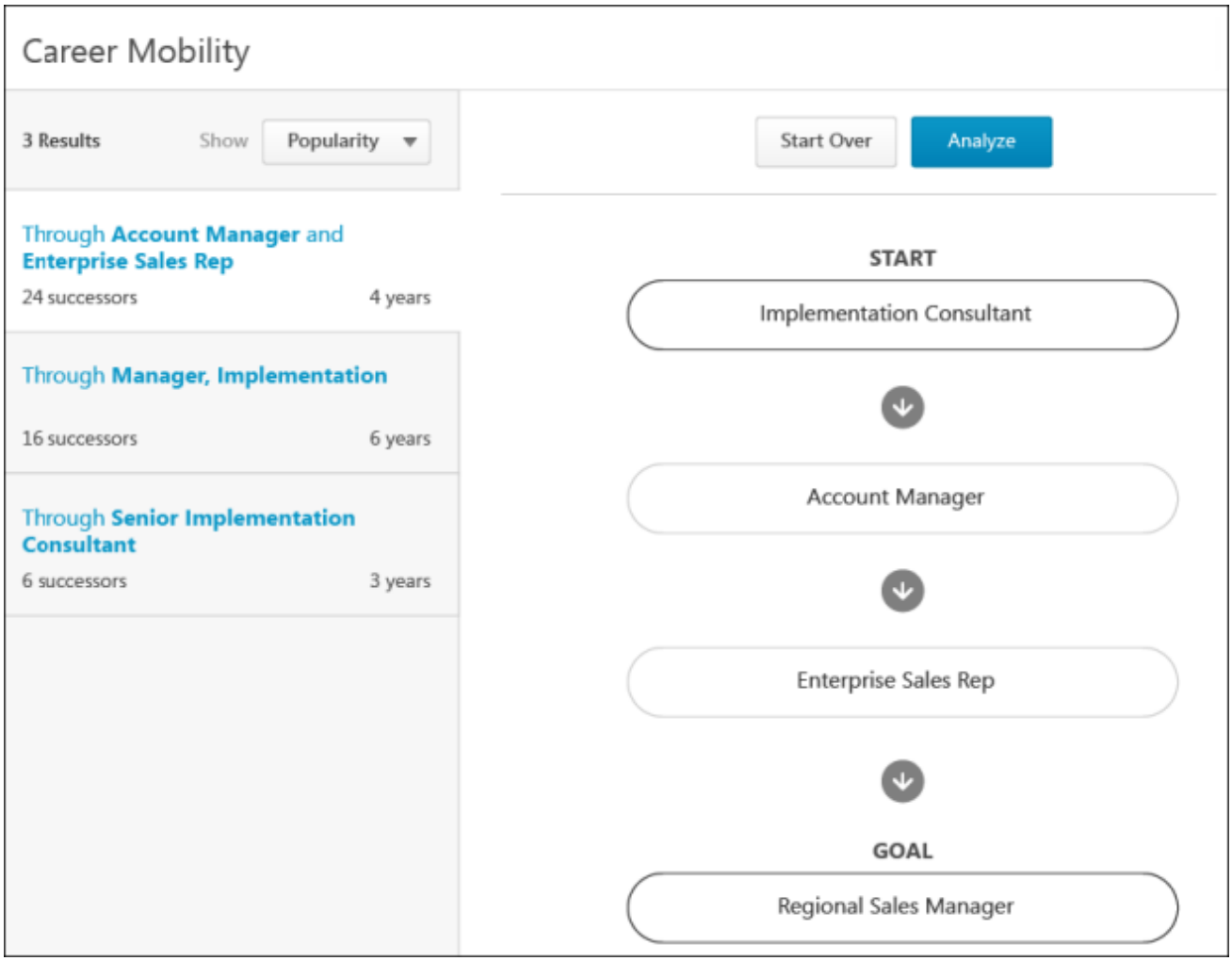
Career Path Search Results Page

The search results page displays the career path, from the starting position to the goal position. Additional positions may display between the Start and Goal positions to indicate the historical transition jobs that led to the next and goal steps in the career path.

To access the career path search results page, click **START** on the **position search page**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Insights Dashboard	Allows user to access Insights Dashboard. This permission cannot be constrained.	Core



Number of Results

This displays the number of career paths.

Sorting

The **Show** option allows you to sort the search results by popularity or years.

- **Popularity** - The search results are sorted by popularity by default. This displays the career paths in order of the highest number of times employees have been transitioned into the next position in the career path from the previous position in the career path. In the image, the goal position of Regional Sales Manager has been reached the most number of times by employees who were in the Account Manager position and then the Enterprise Sales Rep position.
- **Year** - Displays the career path results in descending order by the number of years to succession.

Career Paths

The career paths display in the left panel. They indicate the various positions through which the goal position has been reached. For example, "Through Account Manager and Enterprise Sales Rep" indicates that the goal position of Regional Sales Manager has been achieved through the career path of Account Manager as the starting position, and then the successive position of Enterprise Sales Rep. Or, the starting position has also been Enterprise Sales Rep, which led to Regional Sales Manager.

Note: *If there is only a starting position entered on the position search page, then the goal position will be any succession end position that has been reached from the starting position. If there is only a goal position entered on the position search page, then the starting position will be any position that was started from to reach the goal position.*

Transition Steps

The transition steps display to the right of each career path. The steps display with an arrow between them, indicating that these are the starting and transition positions that have led to the goal position.

Successors

This indicates the total number of historic successors that took the career path.

Years

This is the measure of years of all successors that transitioned through the career path.

Start Over

Click **START OVER** to return to the position search page. The previously selected positions display in the **Start** and **Goal** fields.

Analyze

Click **ANALYZE** to open the career path details page.

Career Path Details Page

From the career path details page, you can learn more about the historical successions of that career path and the recommended development actions for that career path to take place for a potential successor. See the number of successors and how long it has historically taken to reach the goal position. Find the training and competencies needed throughout the career path, as well as certifications and the total number of expected training hours.

To access the career path details page, click the **ANALYZE** button on the **career path search results page**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Insights Dashboard	Allows user to access Insights Dashboard. This permission cannot be constrained.	Core

Start/Goal Position

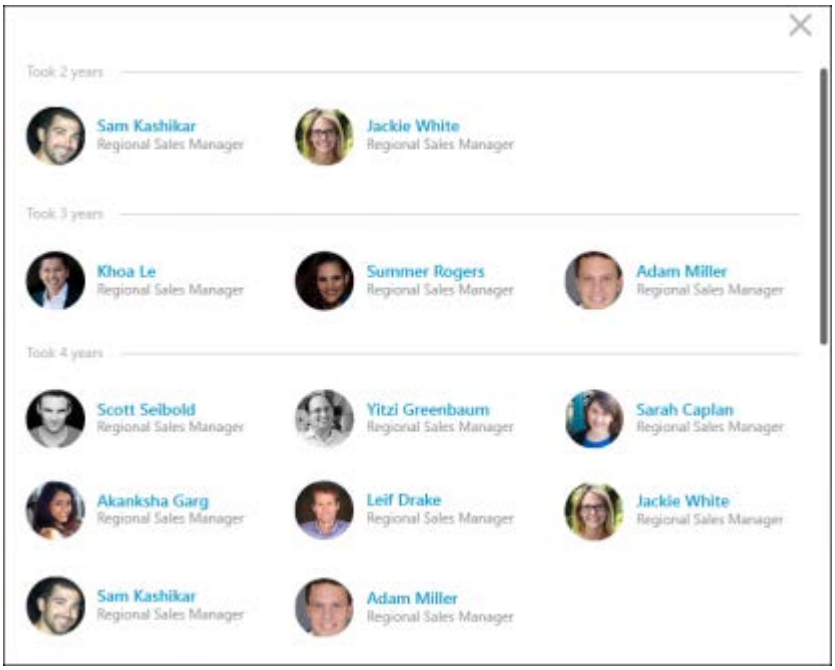
The starting position and the goal position display at the top of the page.

Return to Previous Page

Click the back button to return to the career path search results page.

Number of Past Successors

This is the total number of past successors in the goal position. You can view the details for all successors by clicking the number of successors. This opens a pop-up that displays the successors and the number of years it took to reach the goal position. The list displays in order of the shortest amount of time to succession.



Years to Succession

This is the average number of years to succession to the goal position based on the total successors.

Successors Chart

The bar chart at the top shows a historical view of all past successors that made the transition from the starting position to the end position in the career path.

Axes

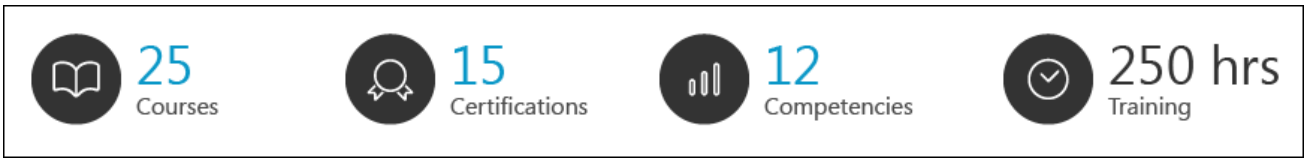
The x axis represents the number of past successors. The y axis groups the data by how many years it took successors to succeed from the starting position to the goal position.

View Successors in Each Group

Click a bar on the chart to view the successors within that group. A pop-up opens to display the past successors, their current position, and the total number of years to succession. If a successor is no longer with the company, then "Inactive Employee" displays in place of the current position name.

Total Development Actions

This section displays the total development actions in each category for all of the transition positions. Click the linked actions to view a pop-up with details of the actions, such as training and certification titles.

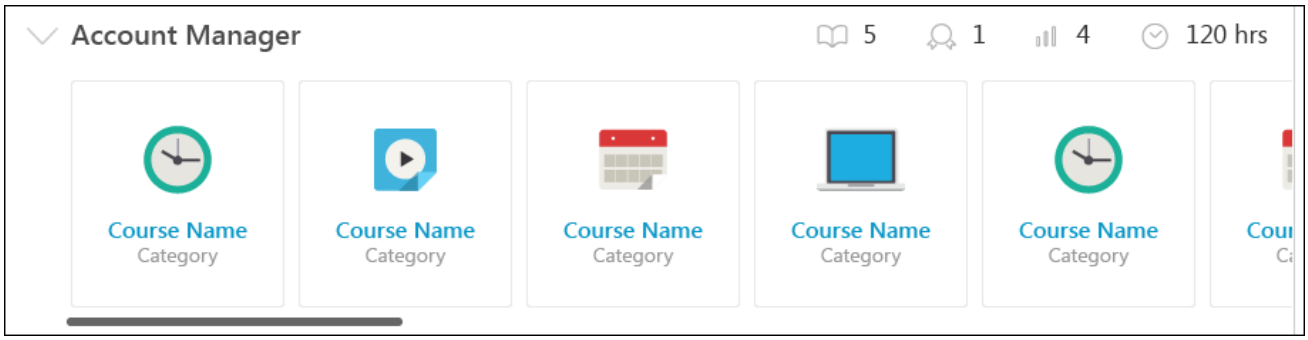


Position-Specific Development Actions

The positions in the career path display in ascending order from starting position to goal position and include the actions that need to be taken in order to get to that position.

To view the development actions for each position, expand the position. Types of development actions may be online courses, events, certifications, competencies to achieve.

The number of training items, certifications, competencies, and total training hours appears above the detailed development actions. You can scroll through the actions to view each action.



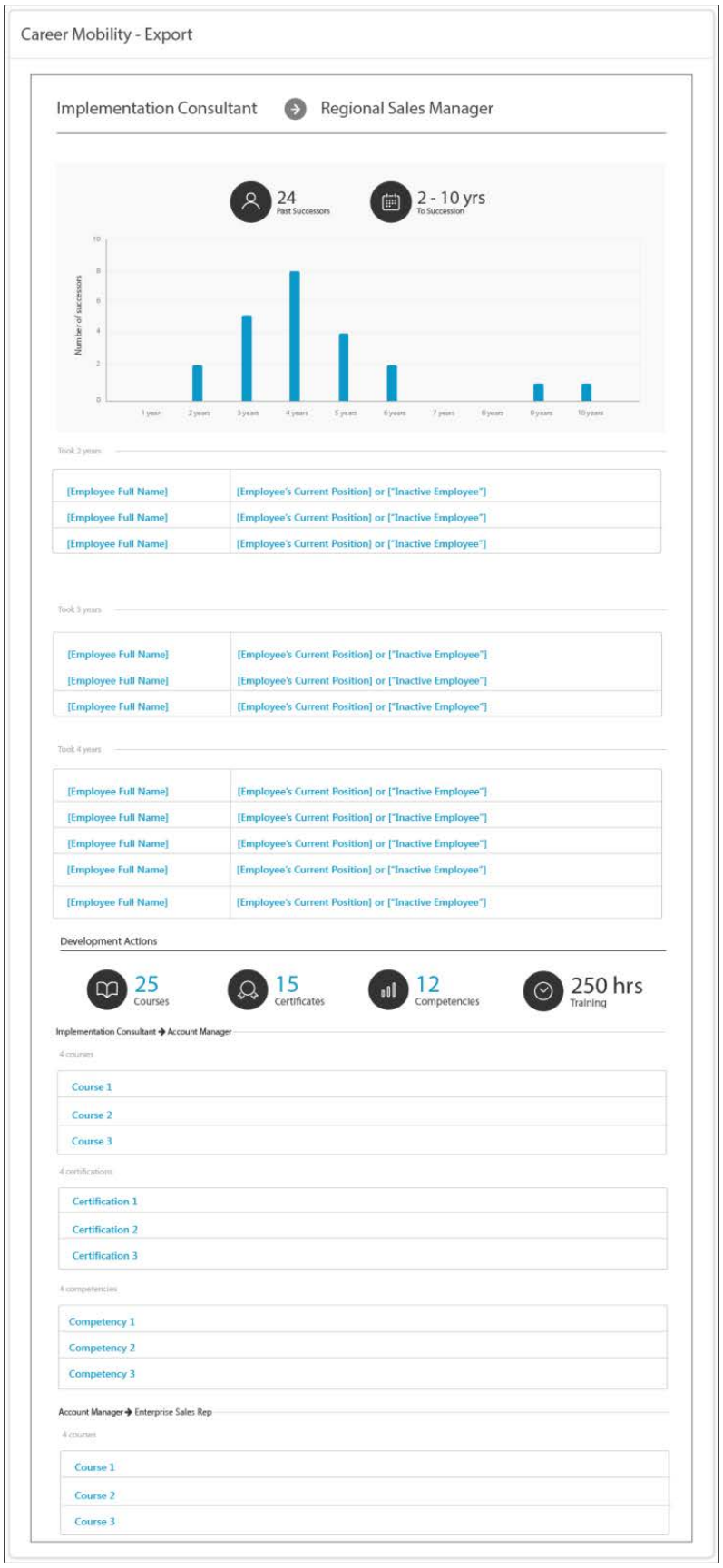
Export or Print Career Path Details

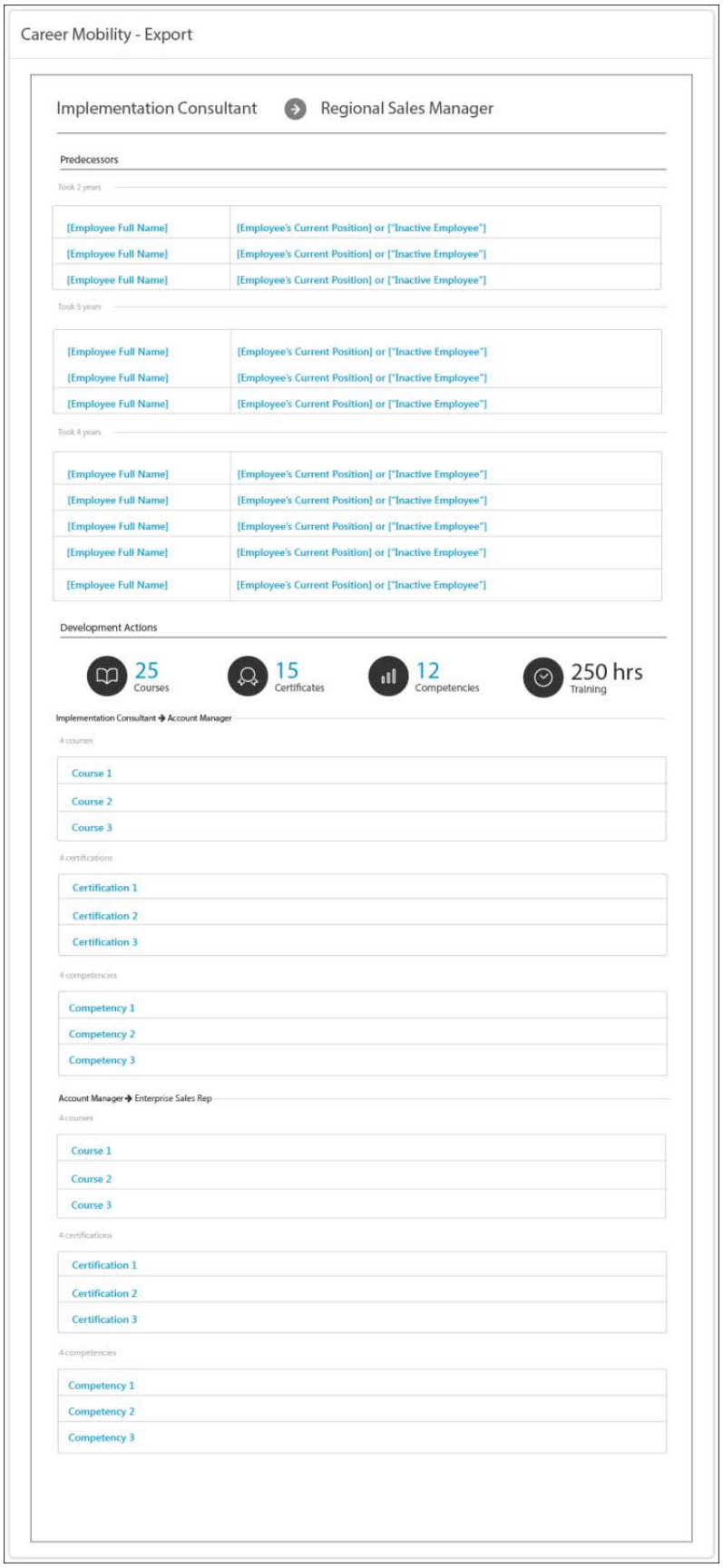
The information on the career path details page can be exported or printed.

Export

You can export the information on the career path details page by clicking the **Export** link in the export button in the upper-right corner of the page. This allows you to open a PDF of the information.

The PDF displays the successors chart, successors and their current role, and the development actions for each transition position.


Career Mobility - Export
Implementation Consultant
Regional Sales Manager
24
Past Successors
2 - 10 yrs
To Succession
Number of successors
1 year
2 years
3 years
4 years
5 years
6 years
7 years
8 years
9 years
10 years
Took 2 years
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
Took 3 years
Took 4 years
Development Actions
25
Courses
15
Certificates
12
Competencies
250 hrs
Training
Implementation Consultant → Account Manager
4 courses
Course 1
Course 2
Course 3
4 certifications
Certification 1
Certification 2
Certification 3
4 competencies
Competency 1
Competency 2
Competency 3
Account Manager → Enterprise Sales Rep
4 courses
Course 1
Course 2
Course 3


Career Mobility - Export
Implementation Consultant
Regional Sales Manager
Predecessors
Took 2 years
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
Took 3 years
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
Took 4 years
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
[Employee Full Name]
[Employee's Current Position] or ["Inactive Employee"]
Development Actions
25 Courses
15 Certificates
12 Competencies
250 hrs Training
Implementation Consultant → Account Manager
4 courses
Course 1
Course 2
Course 3
4 certifications
Certification 1
Certification 2
Certification 3
4 competencies
Competency 1
Competency 2
Competency 3
Account Manager → Enterprise Sales Rep
4 courses
Course 1
Course 2
Course 3
4 certifications
Certification 1
Certification 2
Certification 3
4 competencies
Competency 1
Competency 2
Competency 3

Language Pack Enhancements - Dutch, Czech, Slovakia

With the April 2016 release, Cornerstone is revising the translations for the Dutch, Czech, and Slovakian language packs. Some of the more popular updated translated terms include the following:

ENGLISH TERM	PREVIOUS TRANSLATION (DUTCH)	NEW TRANSLATION (DUTCH)
Learning	Learning	Leren
Goal	Doel	doelstelling
Development Plan	Ontwikkelingsplan	Ontwikkelplan
Helicopter View	Vogelvluchtperspectief	Helicopter View
Recruiting	Werven	Recruiting
Requisition Request	Verzoeken voor aanvraag	Vacature-aanvragen
Manage Requisition	Aanvraag beheren	Vacature-overzicht
Interview Manager	Interview Manager' and 'Manager sollicitatiegesprekken'	Manager sollicitatiegesprekken
Interview Event	Solicitatiegespreksactiviteiten	Sollicitatiegespreksevent
Recruiting Dashboard	Wervingsdashboard	Recruitingdashboard
Recruiting Manager Dashboard	Wervingsmanagerdashboard	Manager Recruiting Dashboard
Test Engine	Testprogramma	Toetsprogramma
Question Bank	Vragendatabase	Vragenbank
Asset Importer	Asses Importeren	Media importeren
Help	Hulp	Help
Succession	Opvolging	Successie
Proxy Enrolment	Automatische inschrijving	inschrijving per volmacht

Implementation

This functionality is automatically enabled for all organizations using the Dutch, Czech, or Slovakian language packs.

Link - Duplicate User Prevention

Link - Duplicate User Prevention

Prior to this enhancement, when user records were added to the Cornerstone system, there was no check to see if the user may have an existing record in the system. This meant that, in some cases, the same employee could have multiple user records. In these scenarios, one employee with multiple user records results in the same user having multiple transcripts and employee histories, which fragments the employee data.

With this enhancement, when an organization using Link creates new users, the system can be configured to evaluate whether the new users are similar to existing user records. If similar records do not exist, the new users will be created normally. However, if similar records do exist, the record creation is prevented.

If configured, the system evaluates whether new users are duplicates of existing users when new users are added to the system from the Admin > Users page and the Data Load Wizard.

By ensuring duplicate records are not created, user record management is simpler and more effective.

Best Practice

When performing your initial load of users, be sure duplicate prevention is off.

Use Cases

1. An organization has multiple HRIS systems feeding data into the Cornerstone system. All employees in United States are managed in one HRIS system, and all employees in France are managed in another HRIS system.
2. Sally moves to a new position in the organization which causes her to move from New York, US to Paris, France.
3. As a result of Sally's move, her information is now managed in a second HRIS system.
4. When Sally's information is fed into the Cornerstone system from the second HRIS system, Cornerstone's duplicate prevention engine identifies Sally's user record as potentially being the same as an existing user record.
5. The administrator views Sally's pending record and determines whether it is the same user as an existing user record or if Sally is a unique new user.

Considerations

The system currently only checks for duplicate users when users are added to the system from the Admin > Users page or the Data Load Wizard.

When duplicate checking is enabled and creation of a new user record is prevented because it is a suspected duplicate, this pending user will not have access to the Cornerstone system. The user will only gain access once the pending user record is reconciled.

Currently, there are no email triggers that fire when a new user is prevented as a likely duplicate. When duplicate prevention is enabled, clients are encouraged to check pending user records on a regular basis.

When a pending user record is identified as a valid new user and a new user record is created for the pending user, the following is true:

- Any password previously defined for the user is not copied to the new user record.
- If there is a top-level corporate password defined in the preferences, this password will be set for the new user.
- If there is not a top-level corporate password, and the organization does not use SSO, there are two options for setting the password:
  - Upon attempting to log in, the user should go through the “Forgot Password” workflow to define a password for themselves.
  - If desired, the administrator can take action by manually resetting the password on the Admin > Users page.

Implementation

This functionality is only available to organizations using Link. This functionality is controlled by a backend setting, which is disabled by default.

Upon release, the Prevent Duplicate Users - Reconcile permission and the Duplicate User Management Preferences - Manage permission are automatically added to the default System Administrator role.

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Duplicate User Management Preferences - Manage	Grants ability to access and configure management of duplicate records, including parameters used to prevent duplicates. This permission cannot be constrained. This is an administrator permission.	Core Administration
Prevent Duplicate Users - Reconcile	Grants ability to view user accounts that have been identified as potential duplicates. Administrators can only view pending user records that were created by administrators who are within the constraints on this permission. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Data Load Wizard - Users	Enables administrator to load users. This permission also enables administrators to track data loads and manage data load templates. This is an administrator permission.	Data Load Wizard

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

Duplicate User Management Preferences

When an organization using Link creates new users, the system can be configured to evaluate whether the new users are similar to existing user records. This is done in order to prevent the same user from being added to the system more than once.

The Duplicate User Management Preferences page enables administrators to configure which standard and custom fields are used to identify potential duplicate users. The system uses the selected fields to compare the user being added to all existing users.

This functionality is only available to organizations using Link.

To manage Duplicate User Management Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > DUPLICATE USER MANAGEMENT PREFERENCES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Duplicate User Management Preferences - Manage	Grants ability to access and configure management of duplicate records, including parameters used to prevent duplicates. This permission cannot be constrained. This is an administrator permission.	Core Administration

Prevent Duplicate Users

Select this option to enable the system to compare new users with existing users to determine if they are potentially the same as a user who already exists within the system.

Duplicate Prevention Threshold

When a new user record is added that has multiple fields that are an exact match with an existing user record, the weights of those fields, which are specified in the table below, are added together.

Enter the number of points above which new users are flagged as potential duplicates. This field is required when the **Prevent Duplicate Users** option is selected. The maximum value for this field is 999. Also, this value must be less than the sum of the **Weighting** values for all added fields.

Fields

This section determines which fields are used to determine whether a new user record is potentially the same as an existing user record.

Add Field

To add a field, click the **Add Field** link. Standard and custom user fields are available. The following field types cannot be selected: Organizational unit, employee relations, encrypted custom fields, multi-select checkbox, branched drop-down, and hierarchy.

A maximum of eight fields can be added. Also, at least one field must be added when the **Prevent Duplicate Users** option is selected.

Weighting

Enter the number of points that are associated with this field. When a field matches that of an existing user, then the points associated with the field are counted towards the duplicate prevention threshold. This field is required. The maximum value for this field is 999.

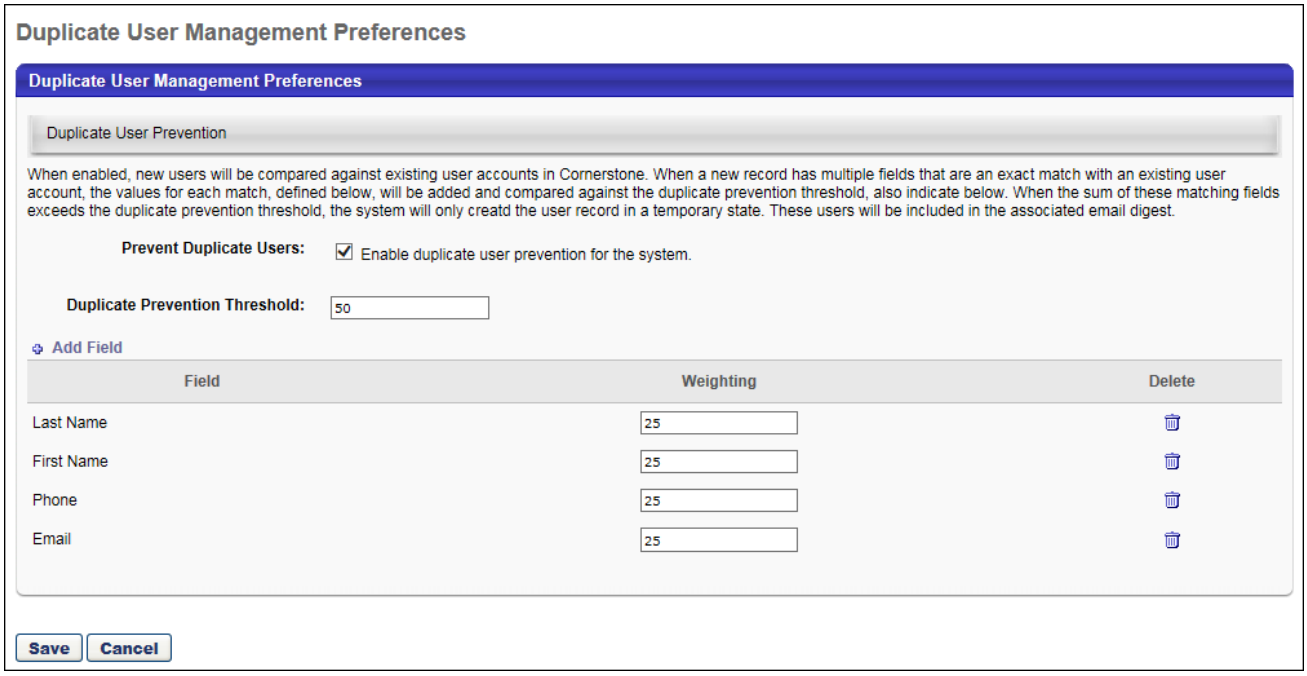
Remove Field

To remove a field from the duplicate user criteria, click the Trash Can icon to the right of the user. This opens a pop-up that displays available standard and custom user fields.

Save/Cancel

Select the **SAVE** button to commit any unsaved changes, including fields that are added or removed and any changes to the duplicate prevention threshold or field weighting.

Select the **CANCEL** button to discard any unsaved changes.



Users - Potential Duplicate User

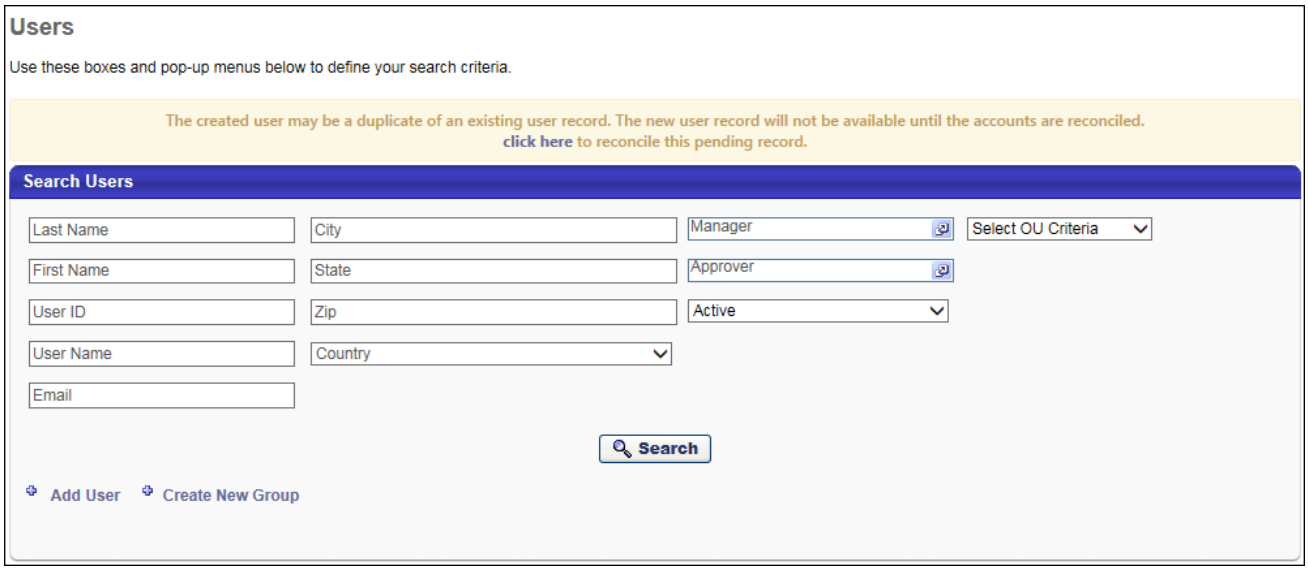
When an organization using Link creates new users, the system can be configured to evaluate whether the new users are similar to existing user records. This is done in order to prevent the same user from being added to the system more than once. If similar records do not exist, the new users will be created normally. However, if similar records do exist, the record creation is prevented. A message is displayed to alert administrators that a potential duplicate user has been identified.

Administrators who have the Prevent Duplicate Records - Reconcile permission can click the link within the message to view and manage pending user records.

To access the User Records Administration page, go to ADMIN > TOOLS > CORE FUNCTIONS > USERS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Prevent Duplicate Users - Reconcile	Grants ability to view user accounts that have been identified as potential duplicates. Administrators can only view pending user records that were created by administrators who are within the constraints on this permission. This permission can be constrained by OU and User's OU. 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
Use these boxes and pop-up menus below to define your search criteria.
The created user may be a duplicate of an existing user record. The new user record will not be available until the accounts are reconciled.
click here to reconcile this pending record.
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

Pending User Records

When an organization using Link creates new users, the system can be configured to evaluate whether the new users are similar to existing user records. This is done in order to prevent the same user from being added to the system more than once.

The Pending User Records page enables administrators to view all of the pending user records that have been identified as likely duplicates of existing user records. These records have not yet been created in the system. For each pending user record, administrators can view each of the existing user records that are similar to the pending user record.

This functionality is only available to organizations using Link.

To manage Pending User Records, go to ADMIN > TOOLS > CORE FUNCTIONS > PENDING USER RECORDS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Prevent Duplicate Users - Reconcile	Grants ability to view user accounts that have been identified as potential duplicates. Administrators can only view pending user records that were created by administrators who are within the constraints on this permission. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

Pending User Records

This section displays the user records that have been identified as likely duplicates of existing user records. The system only displays pending user records that were created by administrators who are within the administrator's permission constraints. For example, if an administrator is constrained to the Technology division, then the administrator can only view pending user records that were created by administrators in the Technology division.

User records are displayed in the order in which they were created with the most recently created user record displayed first.

The following information is displayed for each pending user record:

- Name
- Created - This displays the date on which the pending user record was created.
- Created By - This displays the name of the administrator who created the pending user record.
- Number of Matches - This displays the number of existing user records that have been identified as a potential match to the pending user record.

View Similar Records

To view the existing user records that are similar to the pending user record, select the **VIEW SIMILAR RECORDS** button to the right of the pending user record. All records that are matches with the pending user record, above the duplicate matching threshold, are displayed. The similar record that most closely matches the pending user record is displayed first. The following information is displayed for each similar record:

- Name
- Matching Points - This displays the sum of the points associated with all of the fields that match the pending user record, as of the time when the attempted creation of pending user record occurred. This number is used to indicate how closely the existing record matches the pending user record. The higher the total matching points, the more likely it is that the pending user record is the same user as the existing user record.
- Created - This displays the date on which the user record was created.
- Created By - This displays the name of the administrator who created the user record.
- Status - This displays the status of the user record.
- Similar Fields - This displays all of the fields that were similar between the pending user record and the user record.

Hide Similar Records

To hide the existing user records that are similar to the pending user record, select the **HIDE SIMILAR RECORDS** button to the right of the pending user record.

Delete Pending Record

If the pending user should be deleted from the ‘pending’ state, then click the **DELETE PENDING RECORD** button. After this button is clicked, no further action can be taken with the user.

Create Pending Record as New

If the pending user record is a valid new user, click the **CREATE PENDING RECORD AS NEW** button.

- Any password previously defined for the user is not copied to the new user record.
- If there is a top-level corporate password defined in the preferences, this password will be set for the new user.
- If there is not a top-level corporate password, and the organization does not use SSO, there are two options for setting the password:
    - Upon attempting to log in, the user should go through the “Forgot Password” workflow to define a password for themselves.
    - If desired, the administrator can take action by manually resetting the password on the Admin > Users page.

Overwrite Selected Record with Pending Record

To overwrite the selected existing user record with the corresponding pending user record, select the Overwrite radio button to the left of the appropriate existing user record. Then, click the **OVERWRITE SELECTED RECORD WITH PENDING RECORD** button.

When this button is clicked, the selected existing user record is updated with the information from the pending user record. The effective date for all updated data is the date on which two user records were reconciled. Also, the user record reflects that the fields were changed by the administrator who reconciled the user records.

Done

Select this button to return to the previous page.

Link - Historical Effective Dating for User Data

Link - Historical Effective Dating for User Data

Prior to this enhancement, organizations using Link could not backdate user record data to before the user record was created. That is, when setting an effective date for a modification to a user record, the effective date had to be on or after the date on which the user record was created. As a result, organizations could not migrate legacy employee records to Cornerstone from before the organization began using Cornerstone as an employee data management system.

With this enhancement, organizations using Link can now backdate user record data to before the user record was created. The system now supports historical effective dates as long as the date is on or after January 1, 1901. This enhancement applies to modifications that are made via the User Record or the Data Load Wizard. This enhancement enables organizations to more effectively use Cornerstone as their system of employee records.

The Data Load Wizard is enhanced to support past and future dating of user record fields.

Considerations

Backdating user data before 1901 is not supported.

Backdating is only supported via the User Record and Data Load Wizard.

Currently the Data Load Wizard does not support adding a user with multiple effective dated records within the same load file. If a user has multiple effective dated records, the records must be loaded in separate files.

Implementation

Upon release, this functionality is automatically enabled for all organizations using Link and the Data Load Wizard.

In order to purchase Link or the Data Load Wizard, please contact Sales or your Client Executive.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Data Load Wizard - Users	Enables administrator to load users. This permission also enables administrators to track data loads and manage data load templates. This is an administrator permission.	Data Load Wizard
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	Core Administration

	conjunction with the Users - View and Users - View Core and Edit Custom Fields permissions. This permission cannot be constrained. This is an administrator permission.	
Users - Effective Dating: Manage	Enables administrator to make effective dated changes to the user record. This permission only works when used in conjunction with the Users - Edit permission. This permission cannot be constrained. This is an administrator permission.	Core Administration
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 Core and Edit Custom Fields	Grants ability to view core information on a user record, including first name, last name, username, assigned OUs, custom relationships, and custom fields. This permission also includes the ability to edit any custom fields that are visible to the administrator. This permission works in conjunction with the Users - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

User Record - Set Effective Date

With this enhancement, when editing a user, administrators can now set an effective date that is before the user record was created. The effective date can now be any date in the past that is on or after January 1, 1901.

To add a new user record, go to ADMIN > TOOLS > CORE FUNCTIONS > USERS. Then, click the **Add User** link.

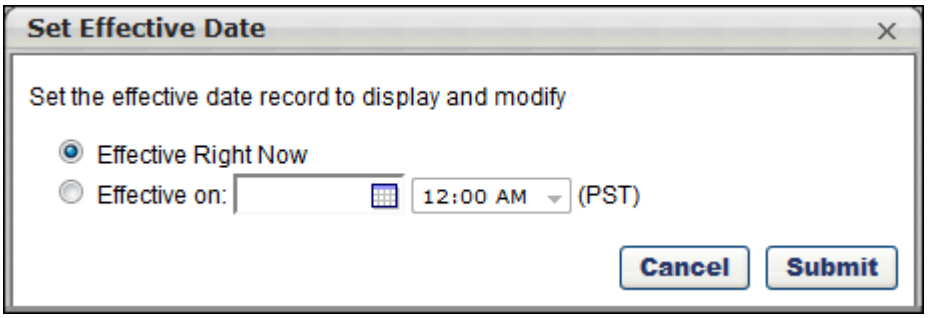
To edit a user record, go to ADMIN > TOOLS > CORE FUNCTIONS > USERS. Search for the appropriate user. Then, click the user's name in the Search Results table.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - 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 - Effective Dating: Manage	Enables administrator to make effective dated changes to the user record. This permission only works when used in conjunction with the Users - Edit permission. This permission cannot be constrained. This is an administrator permission.	Core Administration
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 Core and Edit Custom Fields	Grants ability to view core information on a user record, including first name, last name, username, assigned OUs, custom relationships, and custom fields. This permission also includes the ability to edit any custom fields that are visible to the administrator. This permission works in conjunction with the Users - View permission. This permission can be constrained by OU, User's OU,	Core Administration

	User Self and Subordinates, and User. This is an administrator permission.	

Additional permissions are required to view and edit the various fields on the user record. *See User Record Permissions for additional information.*



Link - Manager Self-Service

Link - Manager Self-Service

Prior to this enhancement, Cornerstone Link enabled users to update their own employee information through forms. However, managers, dotted line managers, and other stakeholders were not able to utilize forms to update employee information for their direct reports.

With this enhancement, Cornerstone Link enables managers to utilize forms to update employee information for their direct reports. In addition, if configured, form data can be submitted by a user within a specified set of criteria for another user.

This enhancement enables organizations using Link to extend the responsibility for updating employee data beyond HR administrators to managers and other roles within the organization.

Implementation

This functionality is only available to organizations using Link. This functionality is automatically enabled for organizations using both Effective Dating and Self-service Forms.

Upon release, when this functionality is enabled, the Form Proxy Completion - Manage permission is automatically added to the default System Administrator role.

Glossary

- Self-service Form - A form or document that a user, manager, or other employee relationship may be able to access on demand. A self-service form may be completed to provide information about yourself or another user.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Form Proxy Completion - Manage	Allows administrator to configure the Proxy Availability settings for a form. These settings determine which users can complete the form on behalf of other users and for which users they can complete the form. This permission can be constrained by OU, User's OU, User, and Employee Relationship. This is an administrator permission.	Forms Administration

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 Core functionality and the Onboarding module. This permission does not grant access to the Training Forms Management functionality.*	Forms Management Administration

Global Search - Forms	Grants ability to search for Forms in Global Search. This permission cannot be constrained. This is an administrator permission.	Forms Management Administration

Form - Create - Access

Prior to this enhancement, Cornerstone Link enabled users to update their own employee information through forms. However, managers, dotted line managers, and other stakeholders were not able to utilize forms to update employee information for their direct reports.

With this enhancement, Cornerstone Link enables managers to utilize forms to update employee information for their direct reports. In addition, if configured, form data can be submitted by a user within a specified set of criteria for another user.

The Self-service settings are only available to admins with Form Self-Service - Manage permission. Self-service functionality is only available to organizations using Link.

To create a form, go to ADMIN > TOOLS > CORE FUNCTIONS > FORM MANAGEMENT > MANAGE FORMS. Then, select the **CREATE FORM** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Form Proxy Completion - Manage	Allows administrator to configure the Proxy Availability settings for a form. These settings determine which users can complete the form on behalf of other users and for which users they can complete the form. This permission can be constrained by OU, User's OU, User, and Employee Relationship. This is an administrator permission.	Forms Administration
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 Core functionality and the Onboarding module. This permission does not grant access to the Training Forms Management functionality.*	Forms Management Administration

Copy Form

When a form is copied, none of the settings on the Access page are copied. This is existing behavior.

Availability

The description in the *Availability* section is updated. The following is the new section description:

- Determine the users that have the ability to Assign this form, configured in the Assign Task column. Additionally, configure whether users have the ability to complete this form by Self Service, in the Self Service column.

Note: *The second sentence of the section description is only displayed to organizations using Link. Also, this sentence is only displayed to administrators who have permission to manage self-service forms.*

The following options are now available in the table for each OU or user that is added:

- **Assign Task** - This option is selected by default. When this option is selected, users who are in the selected criterion are able to assign the form to other users.
- **Self Service** - This option is only available to administrators who have permission to manage self-service forms, and it is selected by default. When this option is selected, users who are in the selected criterion are able to access this form on demand and complete the form for themselves or other users. The settings in the Proxy Availability section are used to configure the self-service functionality.

Implementation Note: *Upon release, the Self Service option is automatically selected for any OUs and users that were previously added to the* Availability *section if the previously existing* **Enable Self-Service** *checkbox was selected.*

Proxy Availability

Form completion by proxy enables users to complete forms on behalf of other users. This section enables administrators to determine which users can complete the form and for which users they can complete the form.

This section is only available to administrators who have permission to manage form proxy completion.

Proxy Availability Sections

Proxy availability can be configured using multiple segments, which enables administrators to configure different proxy completion settings. For example, within the United States, you may allow managers or Human Resources Business Partners (HRBPs) to complete a Position Change form on behalf of a user. However, within France, you may only allow HRBPs to complete a Position Change form on behalf of a user.

Sections can be expanded or collapsed by clicking the section's arrow icon. This enables administrators to manage how much information is displayed on the page.

Add Section

To add an additional Proxy Availability section, click the **ADD SECTION** button. A new section is added to the bottom of the page.

When a new section is added, the section header displays "New Criteria." Once the page is saved, the section header displays the section's availability settings. Displaying a relevant section header enables administrators to quickly identify a section when editing the section.

Remove Section

To remove a Proxy Availability section, click the Remove icon in the upper-right corner of the section.

Removing a section removes all availability and proxy completion settings within the section. Users who are affected by the change in availability and proxy completion settings will notice the change as soon as the page is saved. When Proxy Availability sections are removed, any completed forms are not affected.

Proxy Availability - Availability

The Availability settings determine for which users the self-service form can be completed.

If a form is available to an organizational unit (OU), this means that the self-service form can be completed on behalf of users in the selected OU. Availability, in this instance, does not dictate who can access the form; the ability to access the form for the set of users defined in the *Availability* section is defined in the *Proxy Completion* section. For more clarity, see the Use Case section below.

To add users to the form's availability, select the appropriate option from the drop-down menu. Then, click the Select icon to select the appropriate organizational unit (OU), group, or user. Alternatively, administrators can also enter the OU, group, or user name in the field.

The constraints on the administrator's Form Manage Forms - Manage permission restrict which OUs, groups, and users are available to be selected. For example, if an administrator's permission is constrained by the West division and they select "All users in Corporation," then only the users in the West division are included in the selection.

Select the **Include Subordinates** option to include any subordinate OUs, groups, or users in the availability.

To remove a selection from the *Availability* section, click the Remove icon to the left of the selection.

Proxy Availability - Proxy Completion

The Proxy Completion settings determine which users are able to launch and submit self-service forms for the set of users who are selected in the *Availability* criteria for this section. ***Note:*** *The proxy completion settings are always enforced, even if a link to a self-service form is shared with another user.*

Proxy Completion can be configured by employee relationship (e.g., Manager, Indirect Manager, Subordinates) or OU criteria (i.e., OU, group, or user). From the drop-down menu, select whether you are selecting an employee relationship or an OU, group, or user.

- When selecting an employee relationship, click the Select icon to select the appropriate relationship. Alternatively, administrators can also enter the relationship name in the field.
- When selecting an OU, group, or user, select the appropriate option from the drop-down menu. Then, click the Select icon to select the appropriate OU, group, or user. Alternatively, administrators can also enter the OU, group, or user name in the field.

The constraints on the administrator's Form Manage Forms - Manage permission restrict which OUs, groups, and users are available to be selected. For example, if an administrator's permission is constrained by the West division and they select "All users in Corporation," then only the users in the West division are included in the selection.

Select the **Include Subordinates** option to include any subordinate OUs, groups, or users in the criterion.

To remove a selection from the *Proxy Completion* section, click the Remove icon to the left of the selection.

Availability and Proxy Completion Use Case

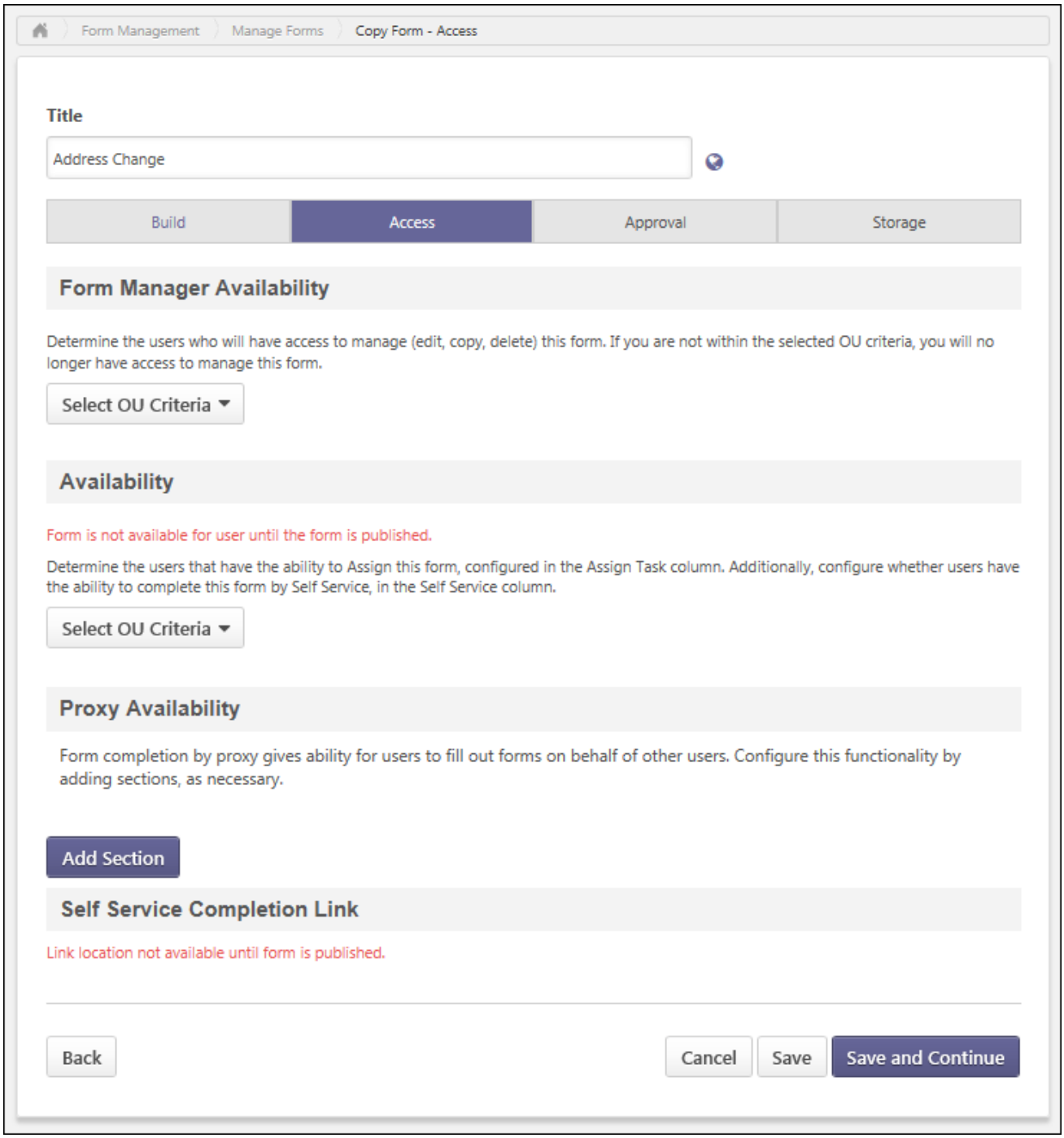
1. A Change of Address form is created. This form can be completed on behalf of all users in the system. Only managers should be able to complete this form on behalf of their direct reports.
2. The Availability can be set to All Employees.
3. The Manager employee relationship is added to the Proxy Completion section so that managers can access and complete the form on behalf of their direct reports in order to change their address.

Self Service Completion Link

The *Launch Forms from Links* section is renamed and is now titled *Self Service Completion Link*.

This section is only available to administrators who have permission to manage self-service forms.

The previously existing **Enable Self-Service** checkbox functionality has been migrated to be controlled in the Availability grid. As a result, the checkbox is no longer displayed in this section.

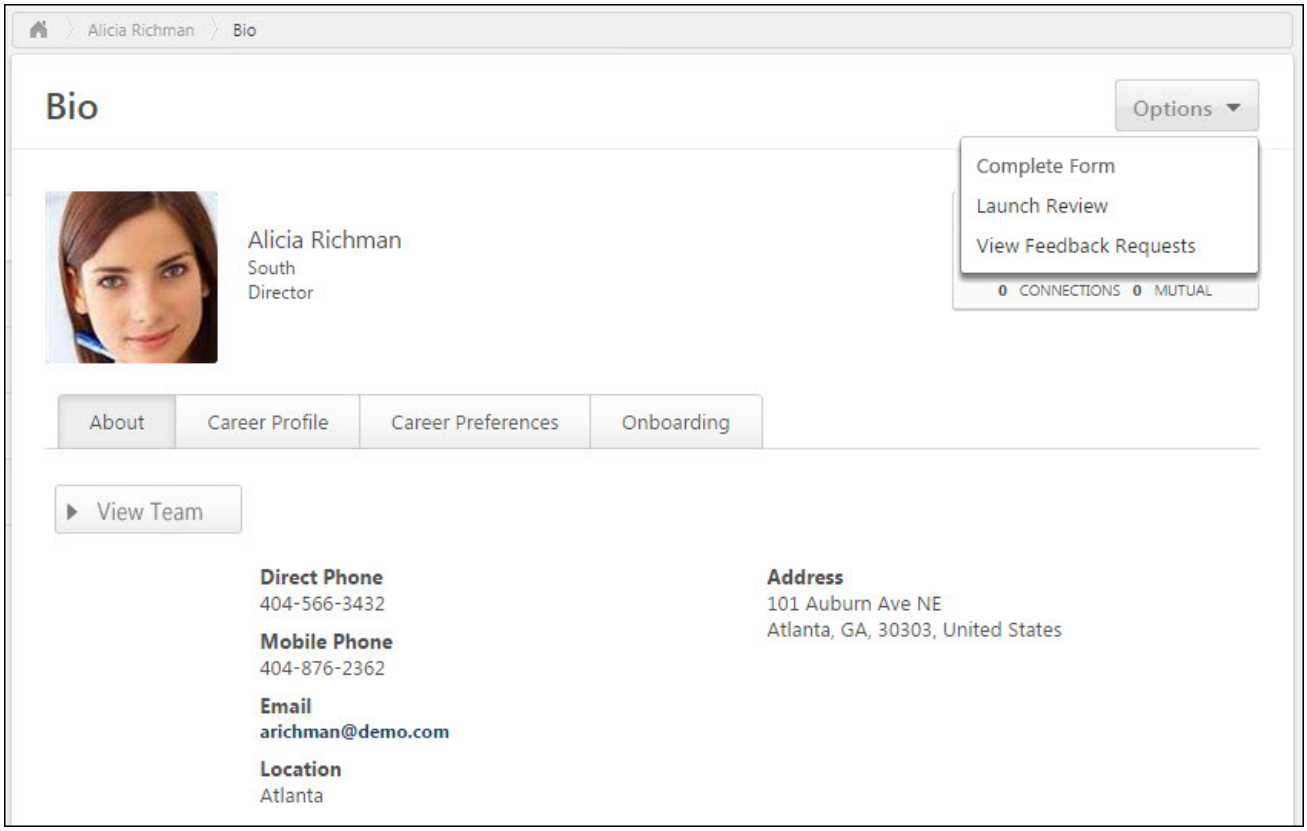

Form Management
Manage Forms
Copy Form - Access
Title
Address Change
Build
Access
Approval
Storage
Form Manager Availability
Determine the users who will have access to manage (edit, copy, delete) this form. If you are not within the selected OU criteria, you will no longer have access to manage this form.
Select OU Criteria
Availability
Form is not available for user until the form is published.
Determine the users that have the ability to Assign this form, configured in the Assign Task column. Additionally, configure whether users have the ability to complete this form by Self Service, in the Self Service column.
Select OU Criteria
Proxy Availability
Form completion by proxy gives ability for users to fill out forms on behalf of other users. Configure this functionality by adding sections, as necessary.
Add Section
Self Service Completion Link
Link location not available until form is published.
Back
Cancel
Save
Save and Continue

Form - Complete for Another User

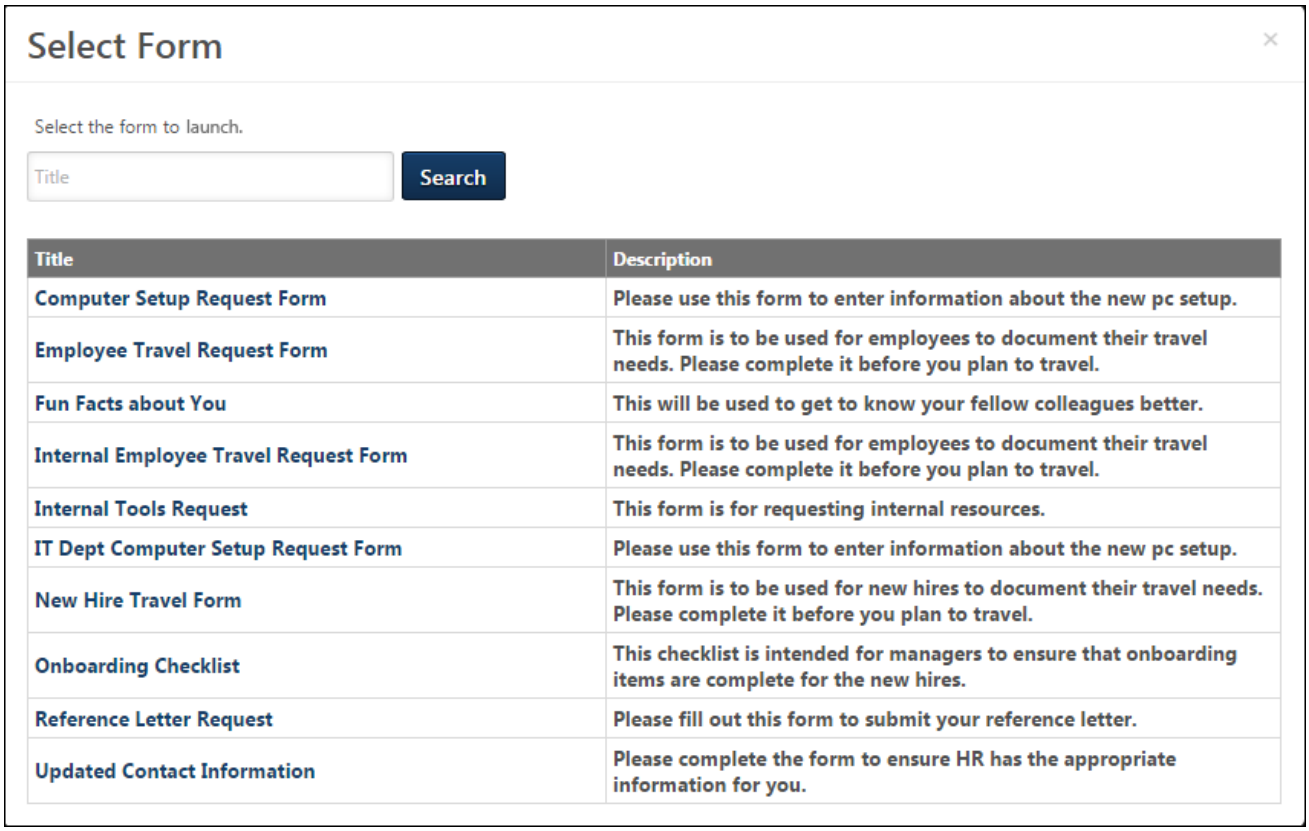
With this enhancement, a form can be configured so that managers and other employee relationships can complete a form on behalf of another user.

When a user is completing a form on behalf of another user, the form title indicates that the form is being completed for another user.

To complete a form on behalf of another user, navigate to the user's Universal Profile page. When viewing the user's Universal Profile page, select the Options drop-down menu, and then select the **Complete Form** option. ***Note:*** *This option is only available if there is at least one form that is configured to allow the user who is logged in to complete the form for the user whose Universal Profile is being viewed.*



From the Select Form pop-up, select the appropriate form. ***Note:*** *The pop-up only displays forms that are configured to allow the user who is logged in to complete the form for the user whose Universal Profile is being viewed.*



The selected form opens, and the form title indicates that the form is being completed for the selected user. All of the information that is displayed or added in the form pertains to the user for whom the form is being completed.

When the form is submitted, any approval workflows that are configured are initiated. When the form is approved, the information that is provided in the form is saved for the user. Also, the form is saved in the user's Snapshot: Documents folder.


Address Form for Johnny Appleseed
Address Form (CIC)
Address Line 1
Address Line 2
City
State
Zip
Cancel
Submit

Online Help Ratings and Feedback

Online Help Ratings and Feedback

With this enhancement, administrators now have the ability to rate topics and provide descriptive feedback within Online Help. The ratings and feedback will be used by Cornerstone to identify topics for improvement in Online Help.

Use Cases

- Marie is a system administrator, and she is having trouble with a field on the Course Catalog - General page. She clicks the **Help** link and is immediately navigated to the Course Catalog topic in Online Help. She quickly finds the information she needs. She rates the topic with a high rating and explains in the *Was this topic helpful?* section at the bottom of the page why she gave the topic a high rating.
- Sam is a system administrator, and he is configuring a new security role. He is not sure what a specific permission controls, so he clicks the **Help** link. He is immediately navigated to the Security Role topic in Online Help. Since he is looking for information on a particular permission, he clicks the Security Permissions topic, which is in the same section as the Security Role topic. There, he locates the permission and reviews the permission description, but he feels the permission description is not very clear. He rates the topic with an average rating and explains in the *Was this topic helpful?* section at the bottom of the page why he gave the topic an average rating.

Considerations

This functionality is only available to administrators.

Implementation

This functionality is not available for testing during UAT, but will be automatic upon release across environments for organizations that have Online Help enabled for administrators.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Help Link - System Administrator	Provides access to view the User, Manager and System Administrator topics in online help. This is an administrator permission.	Core

Rate Topic and Provide Feedback

Administrators are able to provide direct feedback on each topic within Online Help. Administrators can rate a topic out of five stars to provide an overall assessment of the topic. Administrators can also enter specific feedback on a topic using the commenting functionality at the bottom of the page. Using the commenting functionality, administrators can provide more detailed feedback on why a topic was or was not helpful. This feature can be used to identify areas that were particularly helpful or to provide suggestions on how to improve a topic. This feedback enables Cornerstone to continue to improve the Online Help system.

The ability to rate a topic and provide feedback is only available to system administrators.

Access Online Help by clicking the Settings icon in the upper-right corner of any page in your portal. Then, select the **Help** option. The **Help** option is also available from every page in Success Center.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Help Link - System Administrator	Provides access to view the User, Manager and System Administrator topics in online help. This is an administrator permission.	Core

Rate an Online Help Topic

The rating system enables administrators to assess the overall quality and accuracy of the topic. If you have specific feedback that you would like to provide for the topic, please add your feedback at the bottom of the topic.

To rate a topic within Online Help, click the appropriate number of stars in the Online Help toolbar.

If the topic has already been rated, then the topic's average rating is displayed. The topic's average rating is always displayed, even if the administrator's rating differs from the average rating.

Provide Feedback on a Topic

The feedback system enables administrators to provide specific suggestions, criticisms, or praise for a topic. This allows the Cornerstone team to identify specific items or areas of a topic that need improvement or are especially helpful.

To provide specific feedback for a topic, enter the following information in the *Was this topic helpful?* section at the bottom of the topic:

- **Name**
- **Company**
- **Please explain** - In this field, enter an explanation as to why this topic was or was not helpful. Please be as specific as possible so that we are able to effectively utilize your feedback.

After entering the necessary information, select **SUBMIT**.

Organizational Unit Fields in Forms

Organizational Unit Fields in Forms

With this enhancement, organizational unit (OU) fields can now be added to forms so that OUs can be updated using forms.

Considerations

Employee Relationship fields cannot be added to forms. Support for this feature is planned for the July '16 release.

Effective dated modifications are not supported when using forms. Support for this feature is planned for the July '16 release.

Implementation

This functionality is only available to organizations using Onboarding or Link.

Upon release, when this functionality is enabled, the Form Completion - View and Edit OU and Employee Relation Fields permission is automatically added to the default System Administrator role and the default security role for all users.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Form Completion - View and Edit OU and Employee Relation Fields	Allow users to view and modify organizational unit (OU) and employee relation fields when completing a form that contains the fields. The constraints on this permission determine which fields the user can view and edit when completing a form. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User Subordinates. This is an end user permission.	Core

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 Core functionality and the Onboarding module. This permission does not grant access to the Training*	Forms Management Administration

	Forms Management functionality.	
Global Search - Forms	Grants ability to search for Forms in Global Search. This permission cannot be constrained. This is an administrator permission.	Forms Management Administration

Form - Create - Build - Organizational Unit Fields

With this enhancement, administrators can now add organizational unit (OU) fields to a form. This enables OU information to be changed through a form.

To create a form, go to ADMIN > TOOLS > CORE FUNCTIONS > FORM MANAGEMENT > MANAGE FORMS. Then, select the **CREATE FORM** button.

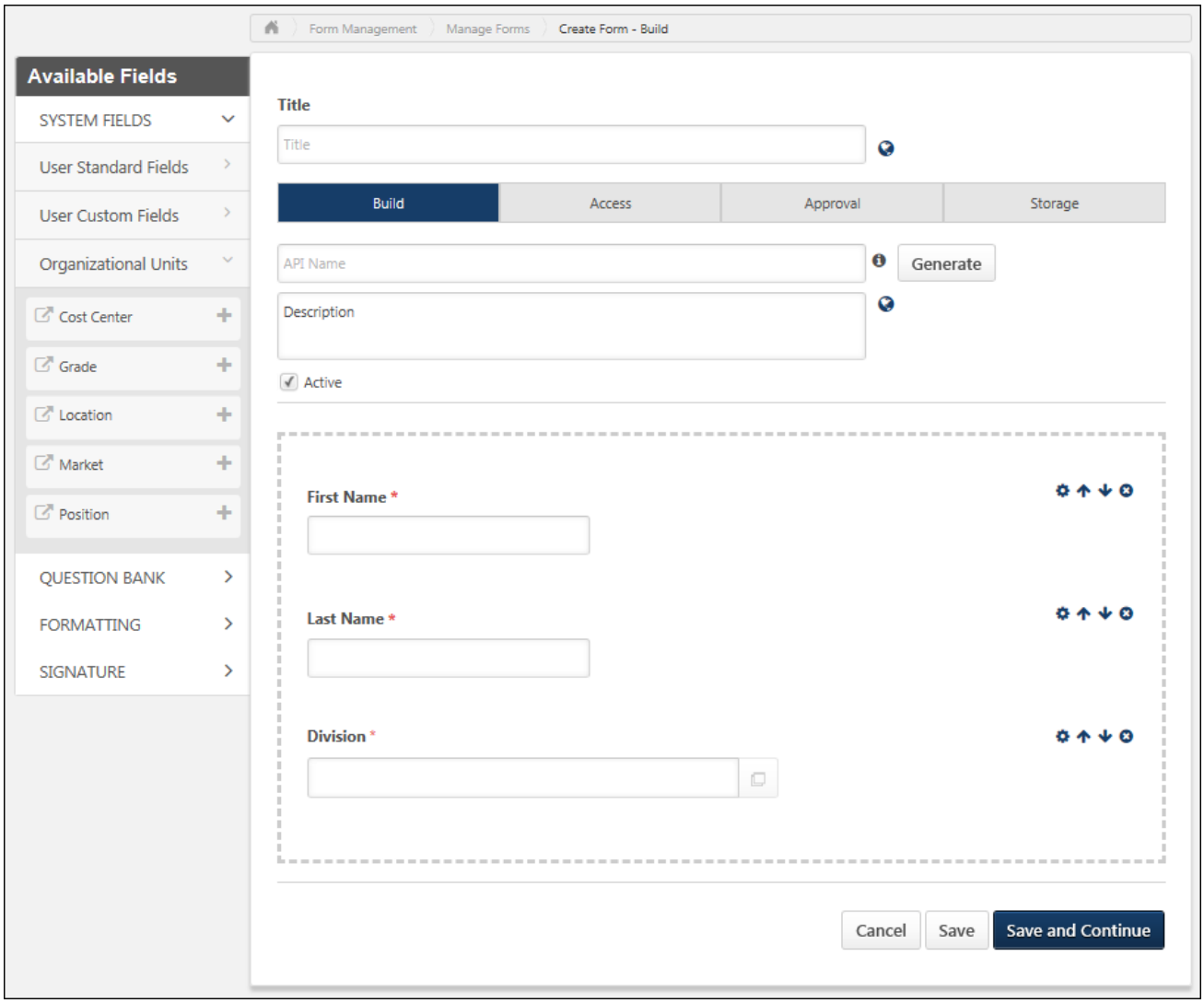
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Form Completion - View and Edit OU and Employee Relation Fields	Allow users to view and modify organizational unit (OU) and employee relation fields when completing a form that contains the fields. The constraints on this permission determine which fields the user can view and edit when completing a form. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User Subordinates. This is an end user permission.	Core
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 Core functionality and the Onboarding module. This permission does not grant access to the Training Forms Management functionality.*	Forms Management Administration
Grades - View	Grants ability to view the Grade Organizational Unit throughout the system, such as in availability drop down selectors, when editing users, etc. Those without this permission do not see the Grade OU on any screen. This is primarily an administrator permission, although organizational policy should determine whether the Grade OU should be visible to end users on reporting screens, etc.	Core Administration

When building a form, the System Fields tab now includes an *Organizational Units* section.

The *Organizational Units* section contains all active OU types, including custom OUs. Groups cannot be added to a form. To add a field, drag and drop the field into the form or click the plus icon to the right of the field title. This adds the field to the form, and the field no longer appears in the list.

Once an OU is added to a form, the OU will remain on the form even if it is made inactive. As a result, users may view or provide information for inactive OUs on a form.



Form - Organizational Unit Fields

With this enhancement, organizational unit (OU) fields can be included in a form.

If OU fields are added to a form, users can only view and edit these fields if they have the Form Completion - View and Edit OU and Employee Relation Fields permission. The constraints on this permission determine which values are selectable in the Select OU control.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Form Completion - View and Edit OU and Employee Relation Fields	Allow users to view and modify organizational unit (OU) and employee relation fields when completing a form that contains the fields. The constraints on this permission determine which fields the user can view and edit when completing a form. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User Subordinates. This is an end user permission.	Core

Page Caching Security Enhancements

With this enhancement, when a user logs out of the system, certain system pages that potentially contain sensitive information pertaining to users and security are automatically cleared from a browser's cache. This prevents the information on these pages from being retrieved by unauthorized users.

One page where users may notice a symptom of the enhanced security while still logged in to the application is on the Search Users administrator page. If a user has navigated away from this page and uses the browser's Back button to return to the page, they may experience a "Webpage has expired" message. User's can avoid this behavior by using the Back, Save, or Cancel buttons within the application or by using the breadcrumbs to return to a previous page. If a user does receive the "Webpage has expired" message, they can simply refresh the page and the application will reload without using information from the browser's cache.

Use Case

An administrator is updating user records and then logs out of the system. Upon logging out of the system, the browser's cache is cleared of any potentially sensitive information related to the User Record page, and the Login page is displayed. If the user selects the browser's Back button, the browser refreshes and continues to display the Login page.

Implementation

This functionality is automatically enabled for all organizations.

REST Service Authentication via SP-initiated SSO

With this enhancement, organizations can now use SP-initiated single sign on (SSO) to authenticate their REST service users.

Implementation

Organizations must have an existing SP-initiated SSO.

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.

Universal Profile My Team Hierarchy Navigation

Universal Profile My Team Hierarchy Navigation

Prior to this enhancement, managers only had the ability to view and navigate between their direct reports using the My Team drop-down within Universal Profile. Managers could not view and navigate across their indirect reports. Additionally, dotted line managers, including approvers and custom relationship managers, could not use the My Team drop-down to navigate between their dotted line reports.

With this enhancement, managers can now navigate through their direct and indirect report hierarchy using the My Team drop-down within Universal Profile. In addition, approvers and custom employee relationships can quickly navigate through their dotted line reports using the My Team drop-down. If the user serves in multiple roles that are available within the drop-down, then the user can select a specific role and view the reports that are associated with that role.

Use Cases

Andy Smith at ABC Company plays multiple roles in the ABC Company portal. He is a manager to several employees, and he is also an approver for another select group of employees. Using the new My Team functionality in Universal Profile, Andy is able to toggle between his different system roles to manage both sets of employees.

If he clicks on the drop-down arrow attached to the My Team button, he can select a desired set of users, such as My Direct Reports, My Approvees, and other custom relationships configured by administrators in the ABC Company portal. He is interested in managing users for whom he has been designated as an Approver, so he clicks the My Approvees option in the drop-down.

This will bring up a list of people whose user records specify Andy Smith as their approver. Andy is able to click any of these users' names to view their Universal Profile pages.

Using the new My Team functionality from Universal Profile, Andy is able to manage not only his direct reports, but also other sets of users he is responsible for managing.

Considerations

The ability to view all team members within all relationships in a single view is not currently supported.

Implementation

This functionality is automatically available for all organizations using the Universal Profile functionality. The My Team drop-down can be enabled through Universal Profile General Preferences.

Additional roles must be added to the My Team drop-down menu via Universal Profile General Preference before they are available to managers in the My Team drop-down.

Glossary

- Approvees - Users for whom another user is designated as an approver. The users for whom an approver is responsible for making approvals on behalf of are referred to as “approvees.”
- Direct Reports - Users for whom another user is designated as a manager. The manager’s subordinates are referred to as “direct reports.”

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Universal Profile Preferences - Manage	Enables administrator to access and edit the Universal Profile General Preferences page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile

Universal Profile General Preferences

Prior to this enhancement, the My Team drop-down only displayed a manager's direct reports.

With this enhancement, the My Team drop-down can be configured so that additional roles, such as approvers and custom employee relationships can use the My Team drop-down to view their dotted line reports.

To access Universal Profile General Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > UNIVERSAL PROFILE. Then, click the **Universal Profile General** link in the General Preferences section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Universal Profile Preferences - Manage	Enables administrator to access and edit the Universal Profile General Preferences page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile

Add Relationship

The My Team drop-down can be used by managers, approvers, and active custom employee relationships to quickly view and navigate to their direct and indirect reports within Universal Profile.

When an employee relationship is added to the My Team drop-down, the relationship will have access to the My Team drop-down. By default, only the Manager relationship is configured to use the My Team drop-down.

To enable additional relationships to use the My Team drop-down, select the appropriate relationship from the drop-down. Then, select the **ADD** button. If the My Team drop-down is enabled, at least one relationship must be added to the drop-down.

Employee Relationship Table

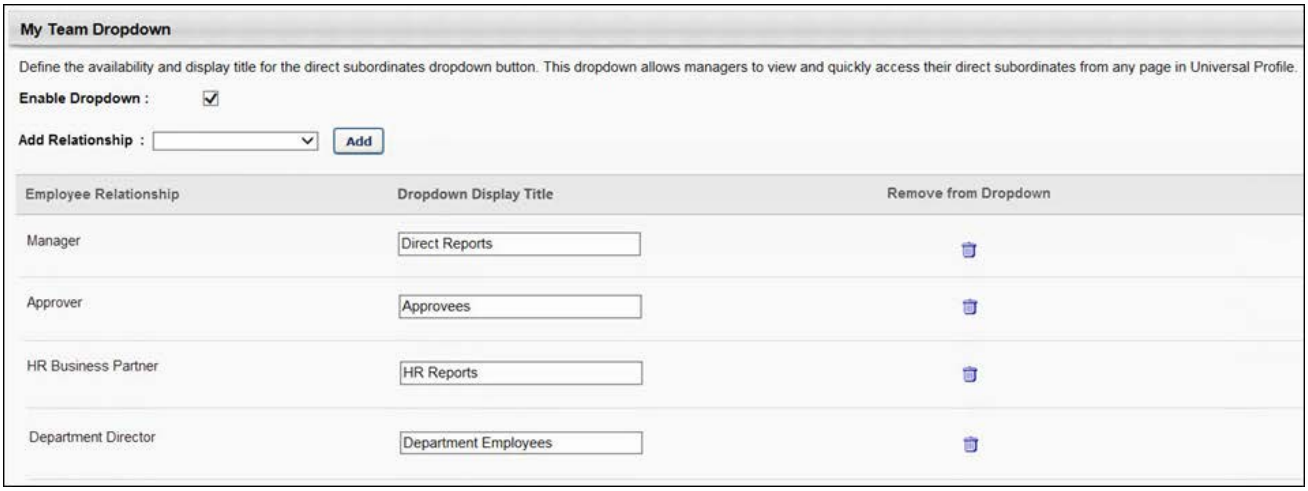
The Employee Relationship table displays all of the employee relationships that are able to use the My Team drop-down to view their team.

- Dropdown Display Title - This field enables administrators to configure the text that displays on the My Team drop-down if the drop-down is enabled for the OU. This field is required for each relationship, and the character limit for this field is 50. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- Remove from Dropdown - Select this icon to remove the role from the My Team drop-down.

Employee Relationship Order

If the user serves in multiple roles that are available within the My Team drop-down, then the user can select a specific role and view the reports that are associated with that role.

Within the Employee Relationship table, the administrator can drag and drop the employee relationships to determine the order in which the relationships appear in the drop-down menu when the user is selecting a role. The first relationship that is available to the user is the role that is selected by default in the My Team drop-down.



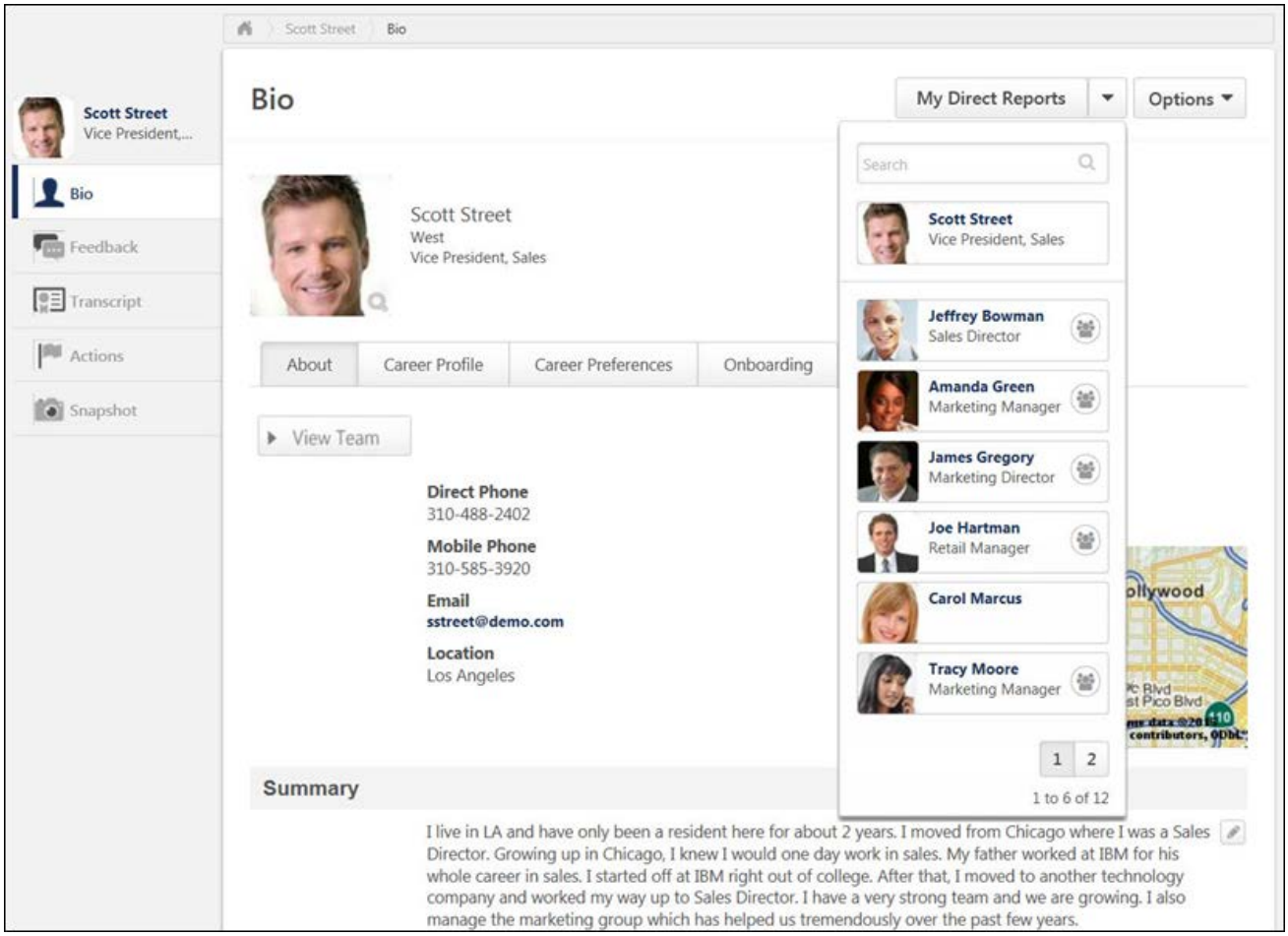
Universal Profile - My Team Drop-down

Prior to this enhancement, managers only had the ability to view and navigate between their direct reports using the My Team drop-down within Universal Profile. Managers could not view and navigate across their indirect reports. Additionally, dotted line managers, including approvers and custom relationship managers, could not use the My Team drop-down to navigate between their dotted line reports.

With this enhancement, managers can now search and navigate through their direct and indirect report hierarchy using the My Team drop-down within Universal Profile. In addition, approvers and custom employee relationships can quickly navigate through their dotted line reports using the My Team drop-down. If the user serves in multiple roles that are available within the drop-down, then the user can select a specific role and view the reports that are associated with that role.

When enabled, the My Team drop-down is available to managers and dotted line managers on all pages of their Universal Profile and the Universal Profile of their direct, indirect, and dotted line reports.

To access Universal Profile, click your photo in the upper-right corner of any system page.

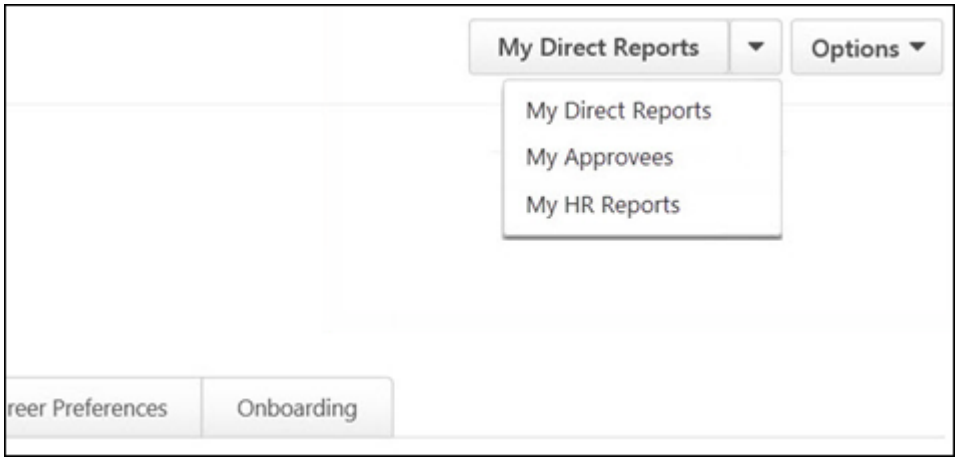


Change Role

If the user serves in multiple roles that are available within the drop-down, then the user can choose to view a specific set of reports based on a particular role. Depending on the role that is selected, the reports that are associated with the selected role are displayed in the drop-down.

To select a different set of direct reports, click the arrow on the right side of the drop-down and select the appropriate role. The drop-down menu displays only the reports that are associated with the selected role.

When selecting a role, the drop-down displays all of the roles in which the user is currently serving. ***Note:*** *A role is only available if the My Team drop-down is configured to include the role and if the manager has reports that are associated with the role. For example, if a user is currently not set as the approver for any users, then the Approver role is not available in the drop-down.*



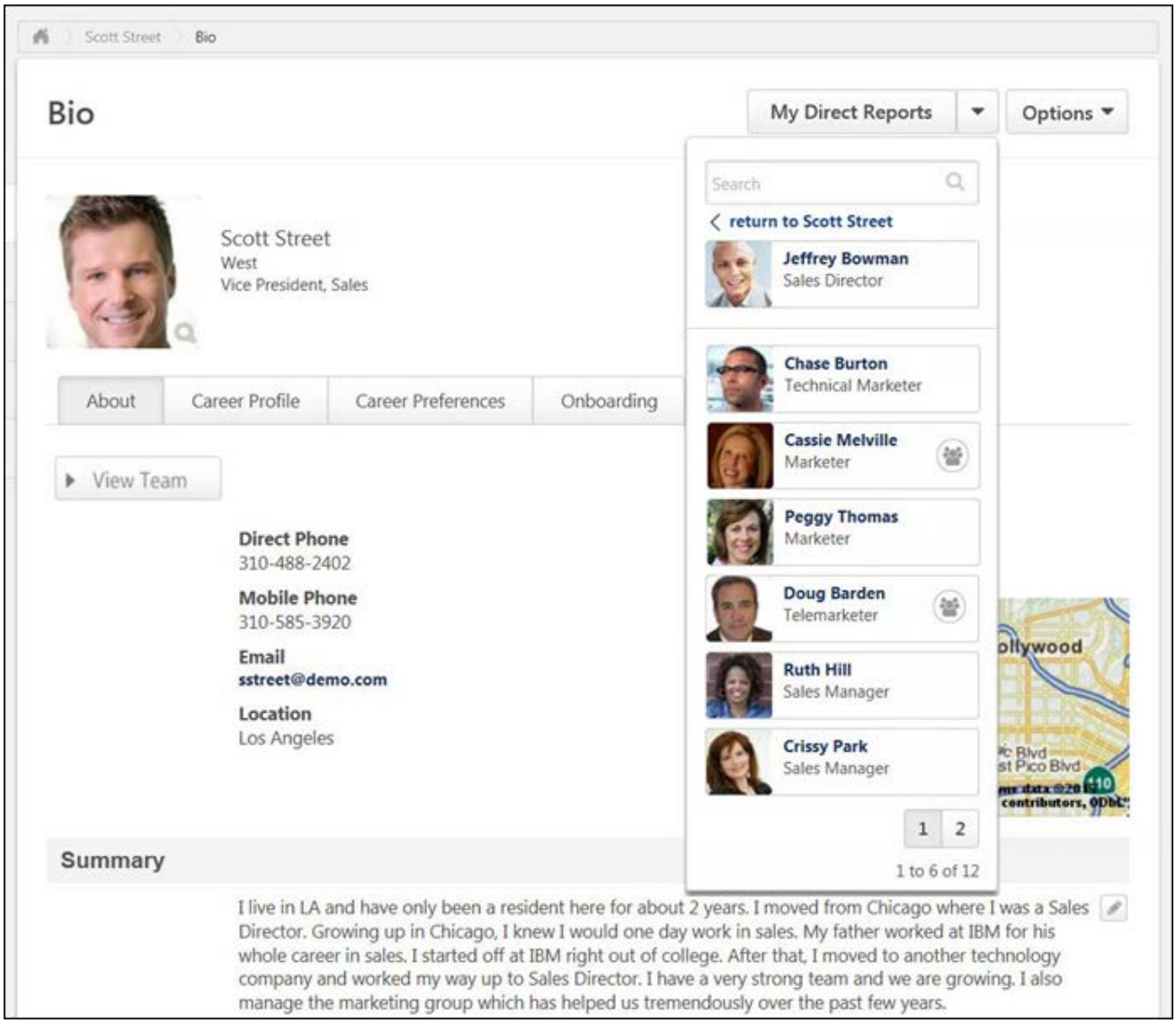
View Indirect Reports

When a manager clicks the My Team drop-down, the manager and the manager's direct reports are displayed within the drop-down.

If a direct or indirect report also has direct reports, a Team icon is displayed to the right of the user's information. To view the user's direct reports, select the Team icon. The My Team drop-down is updated to display the selected user's direct reports, and the selected user is displayed as the manager at the top of the drop-down menu. ***Availability Note:*** *The Team icon is only available when the manager relationship is selected. The Team icon is never available when an approver or custom relationship manager is viewing their reports.*

To return to the previous drop-down view, within the drop-down, select the **Return to User** link below the **Search** field. This link displays the name of the direct manager of the manager whose team is currently displayed in the drop-down menu.

The selected view is maintained in the drop-down as long as the manager remains on the current user's Universal Profile or navigates to another user's Universal Profile using the My Team drop-down menu.



Select Report

When a manager clicks a report or their own photograph within the My Team drop-down from a particular page within the Universal Profile, the manager is navigated to the corresponding Universal Profile page of the selected user, provided that the manager has access to that page for the user. For example, if a manager is viewing their own Snapshot page and selects a direct report from the My Team drop-down, the manager is navigated to the selected user's Snapshot page.

If the manager does not have permission to view the corresponding Universal Profile page for the user or if the corresponding page does not exist for the user, then the manager is navigated to a different Universal Page:

1. If the manager was attempting to navigate to a sub-page (e.g., Snapshot - Goals, Bio - Resume), then the manager is navigated to the corresponding main page (e.g., Snapshot, Bio - About), provided that the manager has access to that page for the user.

2. If the manager was attempting to navigate to a main page (e.g., Snapshot, Actions), then the manager is navigated to the default Universal Profile page.
3. If the manager does not have permission to view a direct report's Universal Profile, then the user's photograph and name are not linked.

When a user is directed to a different page, an alert is displayed at the top of the page that informs the manager that they do not have permission to view the selected page for the selected user. The specific page and user name are displayed in the message.

Search Direct and Indirect Reports

If the manager has more than six reports, then only the first six are displayed on the first page of the drop-down. A **Search** field is available at the top of the drop-down and pagination options are available at the bottom of the drop-down.

- When the Manager relationship is selected, managers are able to search all direct and indirect reports.
- When a non-Manager relationship is selected, such as Approver or a custom relationship, then the user can search for dotted line reports within the selected relationship.

View People

View People Overview

View People is a new, interactive visualization suite that helps managers and executives use employee attributes, such as performance and succession metrics, to identify high-value assets while on the go. View People is available from tablets and desktop devices to provide immediate access to key employee data.

View People removes the complexity and time-consuming process of searching for an employee or candidate. You no longer need to run multiple reports or have specialized knowledge about the system. View People enables you to search across your organizational units (OU) and module data by simply adding and removing filters. The results of a search can be saved or shared or can be used to trigger additional actions, like adding an employee to a list or talent pool.

Use Cases

Filter by OU, Compensation amd Performance

1. Francis, Acme's CEO, was just notified that a top sales executive is leaving the company. Francis would like to search for both internal and external candidates. In order to find internal candidates, her first task is to identify employees that meet the following criteria:
   A. Experience selling Enterprise software.
   B. Classified as high-potential and high-performing based on succession planning metrics.
   C. Must be located in the United States (US), preferably at the headquarters office.
2. She accesses View People from the View navigation tab. Since she is using View People for the first time, she sees a list of her direct reports. The next time she accesses View People, she will see the results of her most recent search.
3. She begins a new search that will be limited to employees that are her subordinates and are part of her OU.
4. Her first step is to use the OU filter to narrow the scope of her search.
   A. She uses the filter accordion for Division to limit the results to employees from the Americas Sales Division. She knows that she could also use the Location filter and limit the results to Los Angeles Headquarters, but this would narrow the results too much for her initial search.
5. She can see an entry for the filter criteria she applied. Each time she applies a new filter, the list is updates.
6. She proceeds to limit the list to high-potential and high-performing employees. To do this:
   A. Under Performance, she navigates to the Potential filter and selects only "High-Potential Employee."
   B. Still under Performance, she navigates to Performance (SMP) and limits the results to "High-Performer."
7. The list has been narrowed to high performers of high potential that reside in the US.
8. Lastly, she wants to narrow the search by skills.
   A. She filters the list by Employee Attributes.

   B. Under Skills, she selects Enterprise Software from the multi-select list.
9. The Screen displays a total of 50 matches, which are sorted by last name by default. She re-sorts the list by tenure and proceeds to color the results by goal completion. This lets her see which employees are hitting their goals, have a high tenure, and meet the other criteria.
   A. Results can be sorted by any of the fields available as filters.
   B. Results can also be sorted in ascending or descending order.
10. She is able to narrow down the list to 30 Candidates.
11. She closes View People and knows that the results of her most recent search will greet her next time she uses View People.

Save and Share Results

1. Francis identified 30 employees who might be a good fit for the Western Region Sales Executive role, but the list is too large. Her immediate goal is to narrow down the list to 10 candidates. She will now focus on adding the following new criteria:
   A. Goal Completion
   B. Readiness
2. Once the list is finalized, she would like to share the list with the sales management team and hand off the candidate selection task to the Vice President of Sales.
3. Francis opens View People. She sees the results of her previous search and the filter criteria she applied.
   A. Users are always greeted by the results of their most recent search.
   B. First time users will either see their top 200 subordinates or the first 200 employees in their Division organizational unit (OU).
4. She adds the Readiness for Promotion.
5. She adds criteria for employees deemed ready for the next role based on the readiness metric.
6. The filters have narrowed down the list to 15 employees. She is now ready to take a closer look at each candidate. Each user card is linked to the employee's user profile, which is a set of components from their Universal Profile > Bio page.
7. She looks at the detailed profile of each candidate to learn more about them.
   A. She examines their career preferences, skills, and interests.
   B. She finds that four of the matches have expressed interest in moving away from sales and into training and marketing roles. Francis makes a point of passing their names to the Director of Talent.
8. She concludes that she has a good starting point. She selects the desired user cards and creates a list.
   A. The list includes all of the individuals selected and can be shared with other users who have access to View People.
   B. The list resides in the list window.
9. She shares the list with the sales management team. All of but one member of the team have access to View People. She prints the list for the sales manager who does not have access to View People and asks the administrator to secure him access to View People.

10. The sales management team reviews the list and makes additions. They share the updates with Francis.
11. Francis shares the final list with the Vice President of Sales.
12. The Vice President of Sales adds the candidates to an existing talent pool.
    A. The hiring and interview process begins.
13. Francis requests updates three weeks later and is happy to discover that the new hire was sourced from the talent pool that was generated from View People.

Take Actions Based on the Results

1. The Vice President of sales, Jason, receives a notification via email that a list of 11 candidates, who might be a good fit for the Western Region Sales Executive role, was shared with him. The list was previously reviewed by the sales management team and the Chief Executive Officer.
2. Jason logs in to View People on his iPad.
3. He taps the List button to view the candidate list that has been shared with him.
4. He begins a deep dive into the list. His goals are as follows:
    A. Identify the candidates that could benefit from additional training.
    B. Review development plans and/or create a development plan, if needed.
    C. Add the best matches to a talent pool to begin the interview process.
5. Jason reviews each profile.
6. He decides that three of the candidates can benefit from further development and training.
    A. He makes a note to share this with their managers and instructs them to create a development plan that includes additional training.
7. He identifies five candidates that will be considered for the role and adds them to the talent pool.
8. The candidates are added to the talent pool, and the Hiring Manager for the role can proceed to the hiring process.

Considerations

View People is the first component in the View suite. Upcoming components will include View Data and View Dashboards.

Implementation

The availability of this functionality is controlled by a backend setting that is disabled by default. To enable this functionality, 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

View People Preferences Page	Grants access to the View People Preferences page, which allows administrators to configure the View People page according to their needs per organizational unit (OU). This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View
View People: Share	Grants access to open View People to view shared lists. Can dynamically grant access to users to only view the lists that have been shared with the user. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports, and User's Subordinates.	View
View People: View	Grants access to open View People to see results and share lists. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View

View People Preferences

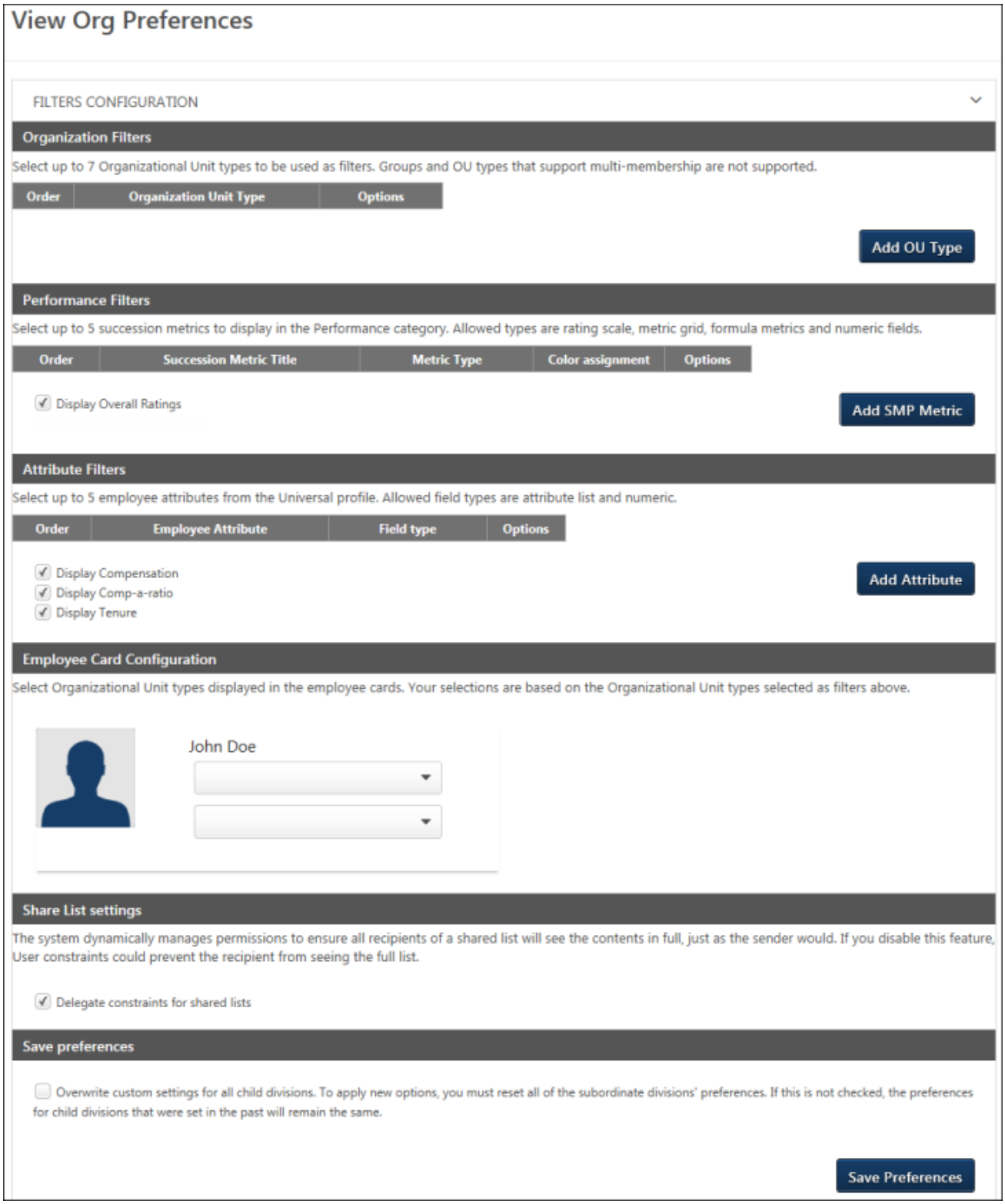
The View People Preferences page allows you to configure the following preferences for View People:

- Define organizational unit (OU) filters
- Define succession metrics filters
- Define employee attributes filters
- Define the OUs that will display for each user in their employee card
- Determine whether or not permission constraints should apply for users when viewing a shared list

To access View People Preferences, go to ADMIN > PREFERENCES > VIEW PEOPLE.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View People Preferences Page	Grants access to the View People Preferences page, which allows administrators to configure the View People page according to their needs per organizational unit (OU). This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View


View Org Preferences
FILTERS CONFIGURATION
Organization Filters
Select up to 7 Organizational Unit types to be used as filters. Groups and OU types that support multi-membership are not supported.
Order
Organization Unit Type
Options
Add OU Type
Performance Filters
Select up to 5 succession metrics to display in the Performance category. Allowed types are rating scale, metric grid, formula metrics and numeric fields.
Order
Succession Metric Title
Metric Type
Color assignment
Options
Display Overall Ratings
Add SMP Metric
Attribute Filters
Select up to 5 employee attributes from the Universal profile. Allowed field types are attribute list and numeric.
Order
Employee Attribute
Field type
Options
Display Compensation
Display Comp-a-ratio
Display Tenure
Add Attribute
Employee Card Configuration
Select Organizational Unit types displayed in the employee cards. Your selections are based on the Organizational Unit types selected as filters above.
John Doe
Share List settings
The system dynamically manages permissions to ensure all recipients of a shared list will see the contents in full, just as the sender would. If you disable this feature, User constraints could prevent the recipient from seeing the full list.
Delegate constraints for shared lists
Save preferences
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 for child divisions that were set in the past will remain the same.
Save Preferences

Organization Filters

This section allows you to select the OU options that will display in the Organization filter. By default, up to five system OUs display in the Organization filter on the View People page: Division, Position, Grade, Cost Center, and Location. You can use the Organization Filters section in View People Preferences to determine if you would like different or additional OUs to display, such as custom OUs.

To define the OU filter options:

1. Click **ADD OU TYPE**. This opens the Select OU Type to Add pop-up.
2. Select an OU from the drop-down. The OUs that display are the active system and custom OUs for the portal. Group OUs and multi-type OUs are not available to select.
3. Click **ADD**. This adds the OU to the list of filters.

You can add more OUs by repeating the steps. Up to seven OUs can be added.

Reorder OU Position

You can change the order in which the OUs appear in the filter by clicking **Move Up** or **Move Down** from the drop-down in the Options column.

Performance Filters

Note: *This section only displays for portals with Performance or Succession.*

This section allows you to configure Performance and Succession metrics.

Succession Metrics

By default, the Performance filter on the View People page displays the first five allowable succession metrics. You can modify the metrics that display by adding metrics in this section. The allowable metric types are rating scale, metric grid, formula metrics, and numeric fields. There are no metrics selected by default to display in the Performance filter on the View People page. The metrics must be added in this section in order to appear as filters.

To add succession metrics:

1. Click the **ADD SMP METRIC** button. This opens the Select Succession Metric to Add pop-up.
2. Select an SMP metric from the **SMP Metric** drop-down. The metrics that display are the active system and custom OUs for the portal. Group OUs and multi-type OUs are not available to select.
3. Click **ADD**. This adds the OU to the list of filters.

You can add more metrics by repeating the steps. Up to five metrics can be added.

Once succession metrics are added, they display in a table below the metrics. The following information displays in the table:

- Order - This column displays the order in which the metrics display in the Performance filter.

- Succession Metric Title - This column displays the name of the metric.
- Metric Type - This column displays the type of metric field.
- Color Assignment - This column indicates whether or not colors have been assigned to the ratings to aid in comparison. The following values display:
  - Complete
  - Incomplete
  - Not Assigned
- Options - The following options display in the options drop-down:
  - **Delete** - Click this option to delete the metric from the filter.
  - **Move Up** - Click this option to move the metric up one position.
  - **Move Down** - Click this option to move the metric down one position.

Performance Options

The **Display Overall Ratings** option allows you to hide the Overall Performance filter on the View People page. Check the box to hide the filter. Uncheck the box to show the filter.

Attribute Filters

Note: *This section only displays for portals with Compensation or Succession.*

If the resume section of Universal Profile is enabled, then the Attribute Filters section allows you to select up to five employee attributes that will display as filters.

To add attributes:

1. Click the **ADD ATTRIBUTE** button. This opens the Select Resume Attribute to Add pop-up.
2. Select an attribute from the **Resume Attributes** drop-down. The attribute types that display are attributes that contain an attribute list or numeric field.
3. Click **ADD**. This adds the attribute to the list of filters.

You can add more attribute by repeating the steps. Up to five attribute can be added.

Attributes Metrics Table

Once attributes are added, they display in the table. The following information displays in the table:

- Order - This column displays the order in which the metrics display in the Performance filter.
- Employee Attribute - This column displays the name of the attribute.
- Field Type - This column displays the type of attribute field.
- Options - The following options display in the options drop-down:
  - **Delete** - Click this option to delete the metric from the filter.
  - **Move Up** - Click this option to move the metric up one position.
  - **Move Down** - Click this option to move the metric down one position.

Compensation Options

Note: *This section only displays for portals with Compensation.*

You can configure the following compensation filter options:

- **Display Compensation** - This option is only available for portals with a single currency. When this option is selected, it displays a sliding Compensation filter in the Attributes section of the Performance filter, which allows users to filter by a compensation range.
- **Display Compa-Ratio** - Including this option displays a sliding Compa-Ratio filter in the Attributes section of the Performance filter, which allows users to filter by a compa-ratio range.
- **Display Tenure** - Including this option displays a sliding Tenure filter in the Attributes section of the Performance filter, which allows users to filter by a tenure range.

Employee Card Configuration

This section allows you to define the OUs that will appear in a user's employee card on the View People page. By default, the Position OU and Location OU display for each user on the View People page. If the Position OU and/or Location OU are inactive, then an active system OU displays for users on the View People page.

You can select up to two OUs. The OU options that are available to select are dependent on the OUs that you added in the Organization Filters section. If there are no OUs added to the Organization Filters section, then no OU options will be available to select in the drop-downs in the Employee Card Configuration section.

To select the OUs:

1. Click the drop-down below the user name "John Doe."
2. Select the OU from the drop-down. The options that are available to select are dependent on the OUs that you added in the Organization Filters section.

Share List Settings

The system dynamically manages permissions to ensure all recipients of a shared list will see the contents in full, just as the sender would. If you disable this feature, User constraints could prevent the recipient from seeing the full list.

Save Preferences

Click **SAVE** to save the preference settings.

Overwrite Settings

Choose whether or not to overwrite custom settings for child division OUs. If you choose to overwrite custom settings for child division OUs, the selected settings are applied to both new and existing child OUs. Any previously customized child OUs are updated with the selected settings.

If this option is unselected, then only the child OUs that do not have customized settings will be updated, as well as any OUs that are added in the future.

A child OU that has not been customized always inherits from the parent, regardless of whether this option is selected.

An OU is considered customized if its preferences or settings have been changed.

Navigation Tabs and Links

With this enhancement, a **View People** sublink is added to Navigation Tabs and Links Preferences. The **View People** sublink must be added to a navigation tab, such as the View tab, in order for users to be able to access View People.

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

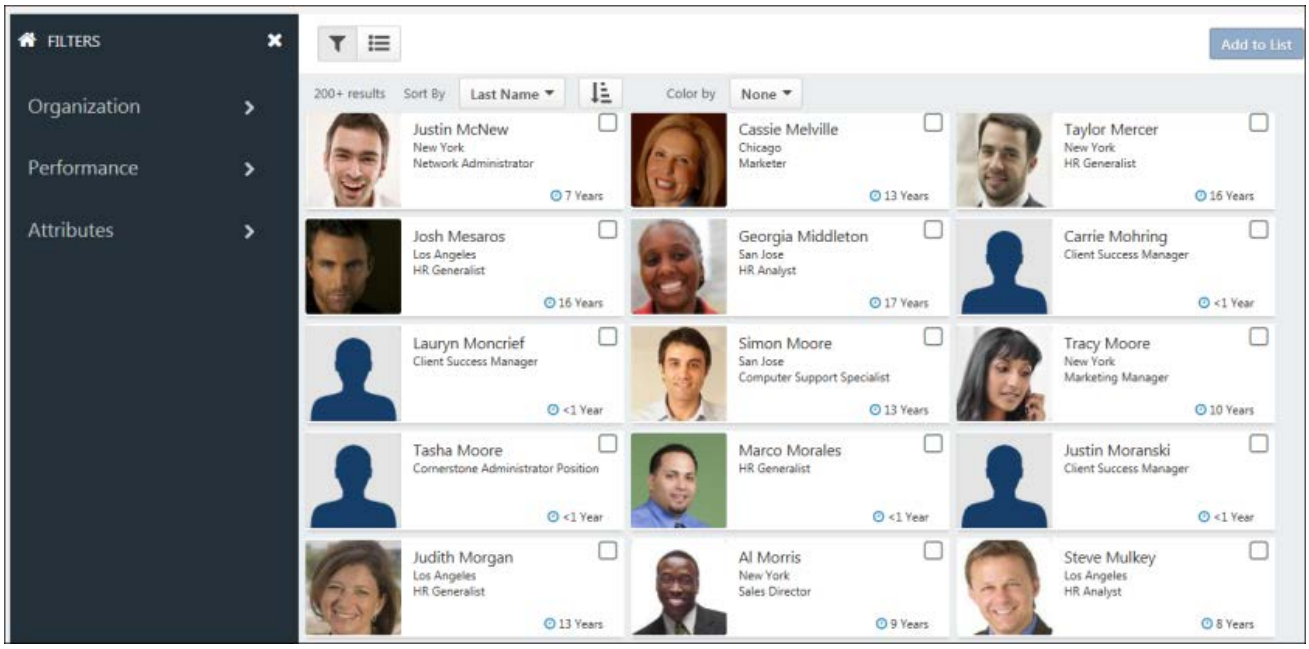
Permissions

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

View People Page - Overview

The View People page is a dashboard that allows managers and executives to use employee attributes, such as performance and succession metrics, to identify high-value assets while on the go. View People is available from mobile and desktop devices to provide immediate access to key employee data.

To access the View People page, go to the associated navigation tab and click **View People**. The location of the **View People** link is dependent upon the configuration by the administrator.

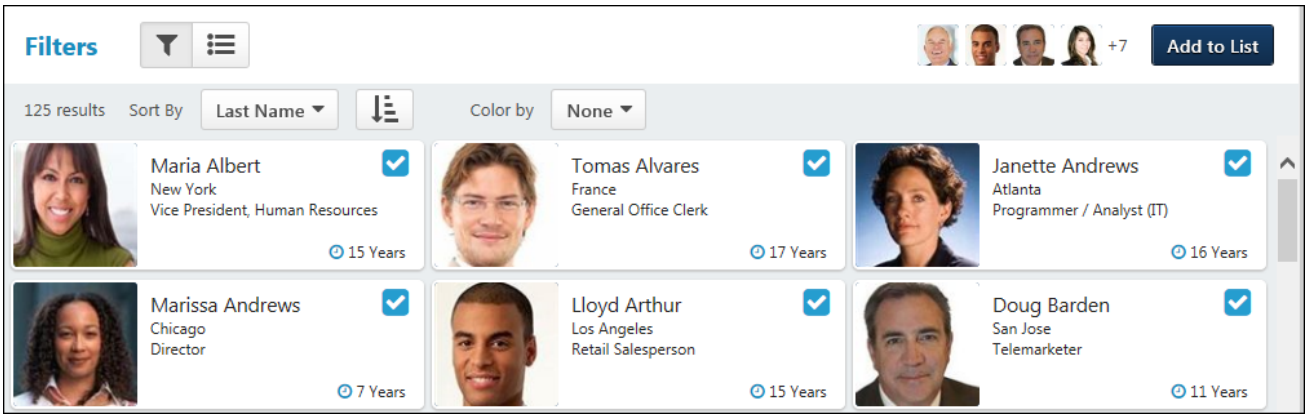


See the following for detailed information about the features available on the View People page and the actions you can take to create lists and talent pools that identify targeted performance levels of employees:

- View People Page - Actions Bar - *See* **View People Page - Actions Bar** on page 183 *for additional information.*
- View People Page - Search Results Panel - *See* **View People Page - Results List Panel** on page 192 *for additional information.*
- View People Page - Filters - *See* **View People Page - Filters** on page 185 *for additional information.*
- View People Page - Selected Employees Page - *See* **View People Page - Selected Employees Page** on page 193 *for additional information.*
- View People Page - View Employee Details - *See* **View People Page - View Employee Profile** on page 201 *for additional information.*
- View People Page - My Lists - *See* **View People Page - My Lists** on page 194 *for additional information.*

View People Page - Actions Bar

The action bar displays above the list of results and enables users to order the employee results, switch between the available views, and take actions on the results.



The following features are available on the actions bar:

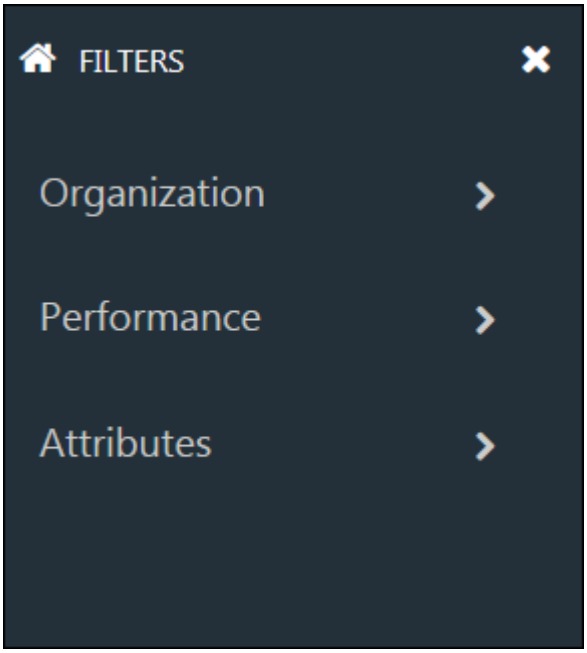
- **Filters** - Click **Filters** to open the Filters panel. The panel opens to the left of the employee results.
- **Filters Mode** - Click the Filters Mode icon to view the page with the Filters panel opened.
- **List Mode** - Click the List Mode icon to view your lists. The page will update to display your lists.
- **Selected Employees Thumbnails** - When you select an employee in the results, their image displays in the upper-right corner of the actions bar. If you have more than four employees selected, the additional number displays to the right of the fourth image. The thumbnails update to display the most recently selected employees. Click any image to view the Selected page, which displays only the employees you have selected. You can remove a thumbnail by deselecting the employee in the results.
- **Add to List** - This option is only enabled when at least one employee is selected. Click **ADD TO LIST** to add the selected employees to a list. This opens the Add to List pop-up. You can create a new list or select an existing list if there is at least one list created. For new lists, you can name the list up to 100 characters. Click **SAVE** to add the employees to the list.
- **Number of Results** - The number of employees in the search displays in the upper-left corner of the results page. The number changes depending on whether or not you are viewing all employees in the results, a selected number of employees, or the employees in a list.
- **Sort By** - You can sort the list by last name or first name. If tenure is enabled by the administrator in **View People Preferences**, then you can also sort by tenure. The list is sorted by last name by default.
- **Order Ascending/Descending** - You can sort the list in ascending or descending order. The order is based on the **Sort By** option you have selected. For example, if

Last Name is selected, then the list is sorted in ascending or descending order by last name.

- **Color by** - For portals with Succession, you can identify employees by a succession metric. The metrics that display are the default metrics defined by the administrator in **View People Preferences**. When a metric is selected, the results are colorized to identify each employee by their rating for the metric. If the selected metric does not have any colors assigned to it, then the metric will appear grayed out and not selectable. If an employee is not rated, then they display with gray diagonal stripes in the color bar. ***Note:*** *As with existing functionality, the colors for succession metrics are defined in* ***Custom Field Administration*** *when configuring the Succession custom field.*
- **Color Legend** - The legend displays to the right of the **Color by** filter. The legend identifies the ratings and their assigned colors that are associated with the selected metric. If there are more than three ratings for the metric, then you can click the ellipses to view the additional ratings and colors.

View People Page - Filters

The filter options allow you to refine the list of results. The filter options that are available are configured by the administrator in **View People Preferences**.



Open/Close Filters Panel

To view the filters, click **Filters** in the actions bar. This opens the Filters panel.

To close the filters, click the X in the upper-right corner of the panel.

Home Button

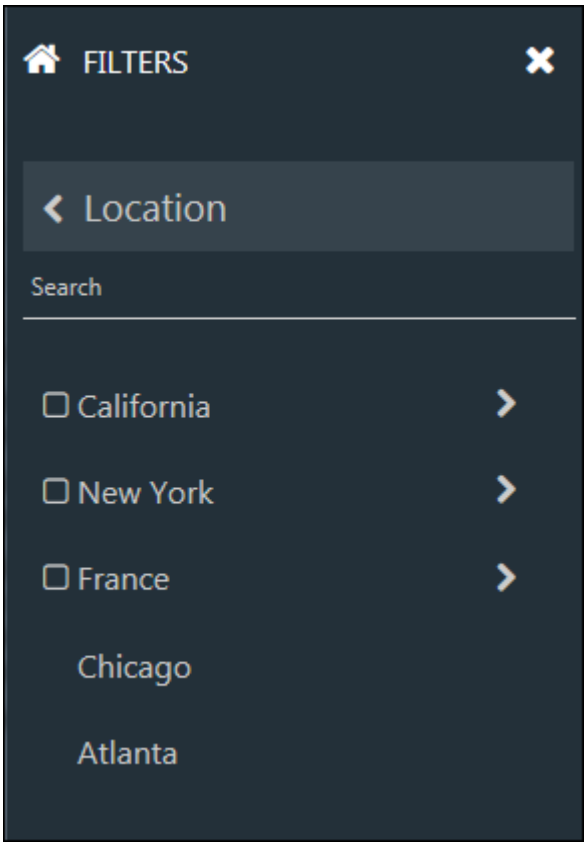
The Home icon in the upper-left corner of the panel returns you to the root level of the filters. Clicking the icon does not reset the filters.

Organization

This filter allows you to filter by up to seven different parent organizational units (OU) and child OUs. The OUs that are available are configured by the administrator in **View People Preferences**.

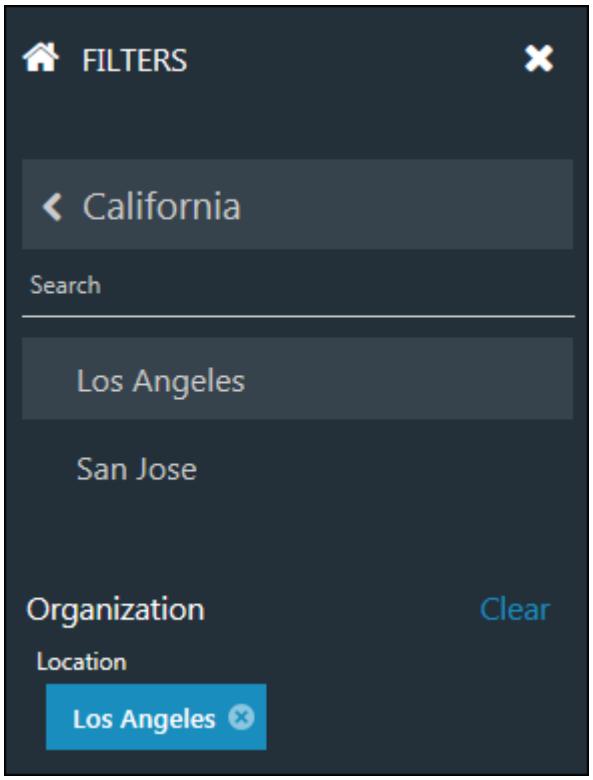
To filter by OU:

1. Click the Organization filter. This opens the list of parent OUs.
2. Click the parent OU to view the child OUs.



3. Check the box to the left of the child OU name to select the child OU as a filter.
4. Or, click the child OU to view the additional child OUs. Then, click the name of the additional child OU to set it as a filter.

The page updates automatically to display matching employees. Repeat these steps to set additional filters. The selected filters display at the bottom of the Filters panel.

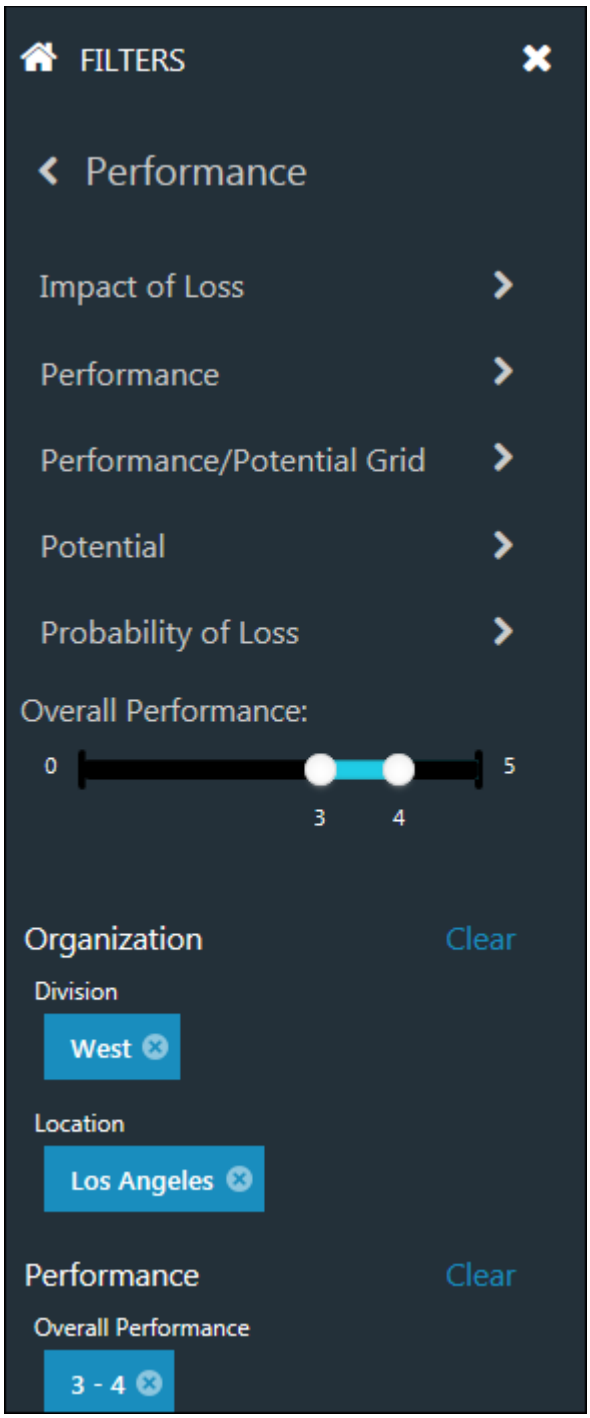


Performance

Note: *This section only displays for portals with Performance or Succession. Performance filters are only visible to portals with Performance. Succession filters are only available for portals with Succession.*

This filter allows you to filter by up to five different succession metrics. The metrics that are available are configured by the administrator in **View People Preferences**.

You can also filter by overall performance rating. The rating that displays is the rating for the user's most recently completed review.



To filter by succession metric:

1. Click the Performance filter. This opens the list of succession metrics and displays the Overall Performance rating filter.
2. Click the metric to view the available ratings.
3. Click a rating to select it as a filter.

To filter by overall Performance:

1. Slide the rating scale from the left to set the minimum rating.
2. Slide the rating scale from the right to set the maximum rating.

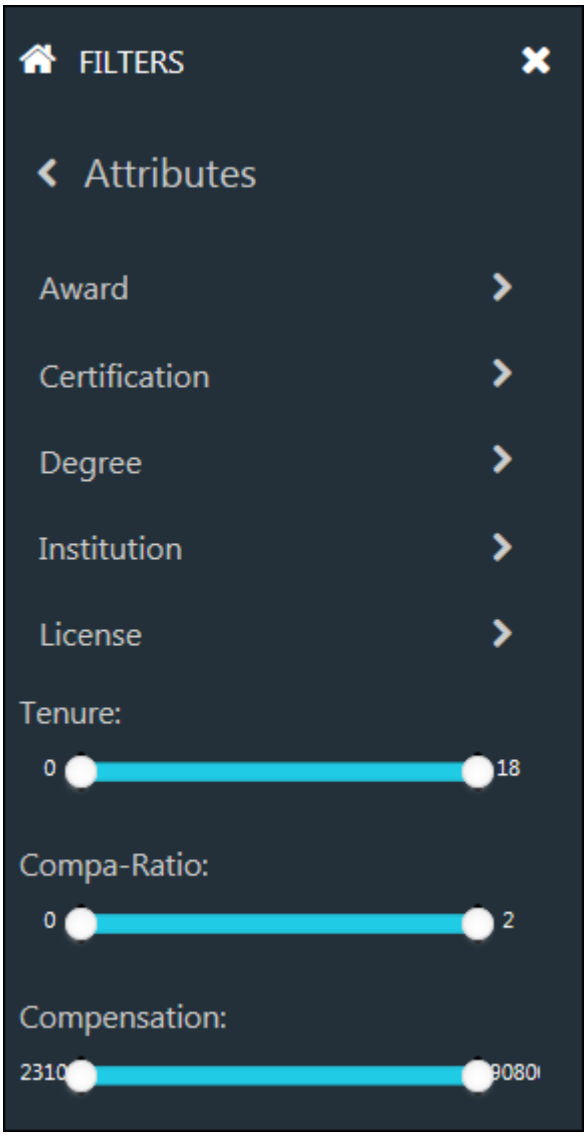
The page updates automatically to display matching employees. Repeat these steps to set additional filters. The selected filters display at the bottom of the Filters panel.

Attributes

This filter allows you to filter by employee attributes. You can also filter by tenure, which is the total time elapsed since the user's hire date. You can filter by compa-ratio, which is a numeric value with two decimal points of accuracy and is used to indicate whether or not an employee is underpaid. You can filter by compensation by setting a minimum and maximum annual salary range.

The filter options that are available are configured by the administrator in **View People Preferences**.

Note: *For portals with multiple currencies, Compensation will not be available as a filter for the April '16 release. The Compensation filter will only be available for portals that have a single currency.*



To filter by employee attributes:

1. Click the Attributes filter. This opens the list of parent attributes.
2. Click a parent attribute to view the child attributes.
3. Click the child attribute to set it as a filter. Up to four attributes can be selected.

To filter by compensation options:

1. Slide the bar from the left to set the minimum tenure, compa-ratio, or compensation (annual salary).
2. Slide the bar from the right to set the maximum tenure, compa-ratio, or compensation (annual salary).

The page updates automatically to display matching employees. Repeat these steps to set additional filters. The selected filters display at the bottom of the Filters panel.

Note: *The compa-ratio is used to indicate whether or not an employee is underpaid. This is a numeric value with two decimal points of accuracy.*

Selected Filters List

The filters you have selected display at the bottom of the Filters panel.

Delete Filter

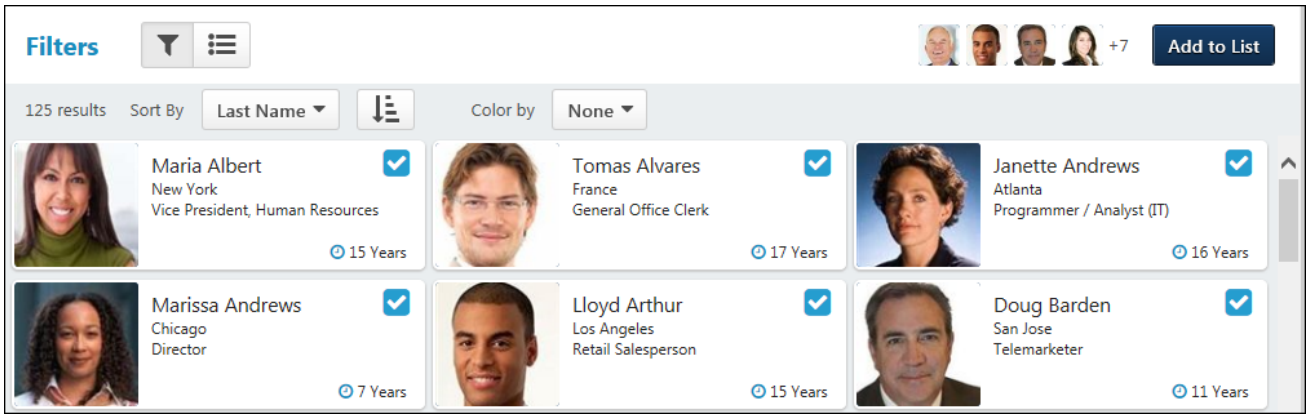
You can remove a filter by clicking the X to the right of the filter.

Clear Filters Group

You can remove all filters in a group by clicking **Clear**.

View People Page - Results List Panel

The main section of the View People page displays the results list of employees. The employees display in individual cards from left to right and can be selected to add to a list. The employees that display are the employees that are available for the user to view based on permission constraints and who match the filter criteria that has been applied. Up to 200 employees display.



Employee Cards

The following information displays in the employee cards:

- Photo
- Name
- [Organizational Unit 1] - This displays if an organizational unit (OU) is configured to display by the administrator in View People Preferences. The OU will be an active OU for the portal.
- [Organizational Unit 2] - This displays if an organizational unit (OU) is configured to display by the administrator in View People Preferences. The OU will be an active OU for the portal.
- Checkbox - The checkbox allows you to select the employee to add to a list or talent pool. When checked, the employee's thumbnail image displays in the upper-right of the page. The thumbnails update to display the most recently selected employees. Deselecting the checkbox removes the thumbnail, and the employee can only be added to a list or talent pool if the box is checked again.
- Tenure - The tenure displays in the lower-right corner of the card. The tenure displays as a number of years and is calculated from the user's hire date to the current date.
- Color Bar - If the **Color by** filter is set, then a color displays on the right side of the card. The color that displays corresponds to the employee's metric rating for the succession metric that is selected in the **Color by** filter.

View Employee Profile Page

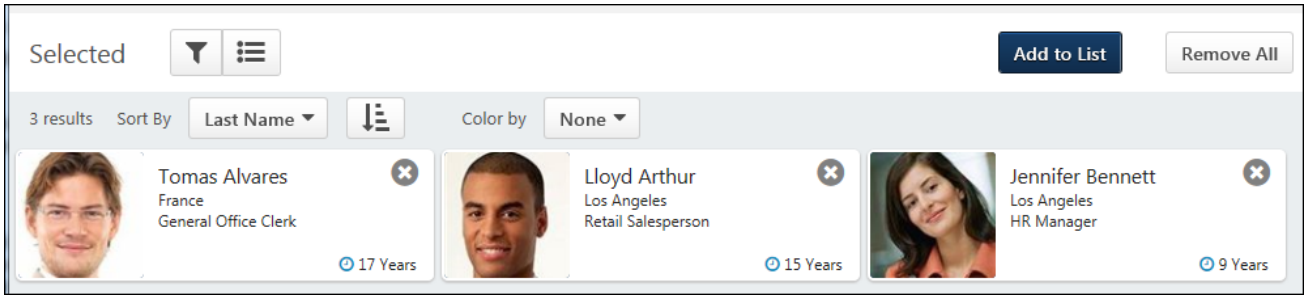
You can view the employee's profile page by clicking anywhere in the card except for the checkbox. This opens the profile page for the employee.

View People Page - Selected Employees Page

The Selected page displays only the employees that you have selected. From this page, you can apply the **filters from the actions bar**, as well as add the employees to a list.

You can also click **REMOVAL ALL** to deselect all the employees, which opens a confirmation pop-up. Click **OK** to deselect all employees. This refreshes the page to display your most recent list of results.

You can also **access the employee's profile page** by clicking anywhere in the employee's card, except on the Remove icon .



View People Page - My Lists

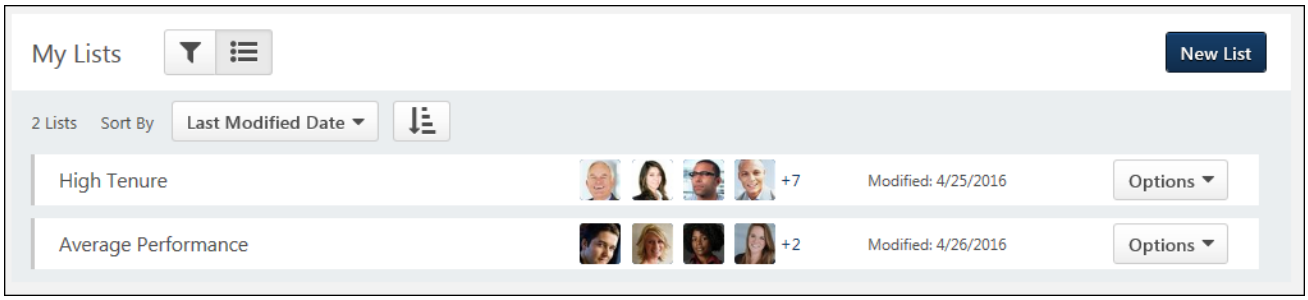
The My Lists page displays the lists that you have created and the lists that have been shared with you. From this page, you can:

- Create a new list
- Share an existing list
- Delete a list
- View a shared list
- Add a list of employees to a talent pool

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Talent Pools - Manage	Grants ability to create and manage Talent Pools. This permission also grants access the ability to add candidates to a job requisition. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration
View People: View	Grants access to open View People to see results and share lists. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View

To access the My Lists page, click the List Mode icon.

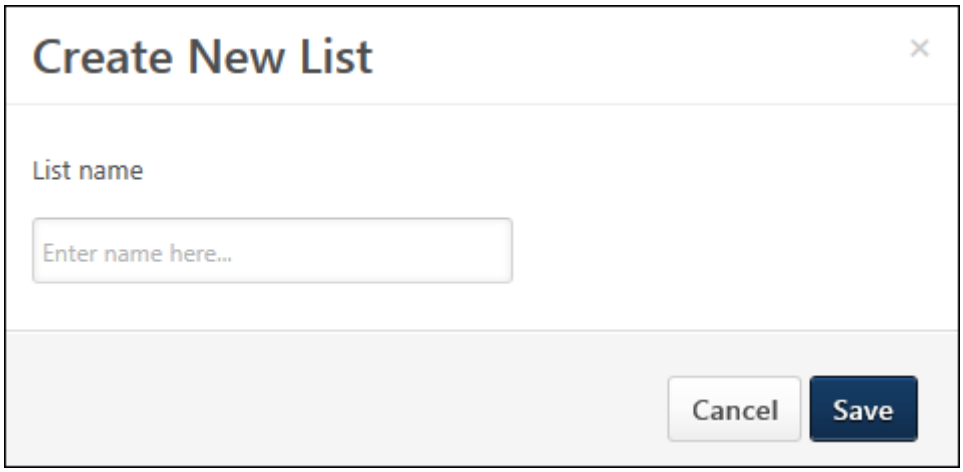


New List

You can create a new list directly from the My Lists page. This allows you to develop a collection of lists so that you can add employees to the list from other areas of View People.

To create a new list:

1. Click **NEW LIST** to create a new list. This opens the Create New List pop-up.



2. Enter a name for the list, up to 100 characters.
3. Click **SAVE** to save the list.

Once the list is saved, it will not contain any employees. You can add employees from other areas of View People.

Sorting Options

The following sorting options are available:

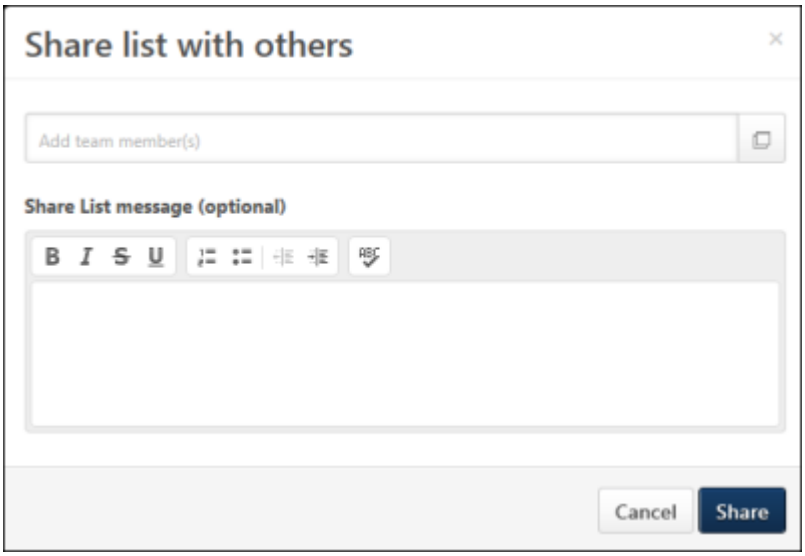
- **Sort By** - By default, the lists display in order of most to least recently modified. The following sorting options are available:
  - **Last Modified Date** - This allows you to sort by the date on which the lists were most recently modified.
  - **Title** - This allows you to sort by list title.
- **Order Ascending/Descending** - You can sort the lists in ascending or descending order. The order is based on the **Sort By** option you have selected. For example, if **Title** is selected, then the list is sorted in ascending or descending order by list title.

Lists

Each list displays in a separate row. The following information displays for the lists:

- **List Title** - This displays the name of the list.
- **Shared Status** - A Shared icon displays to the right of the list title. Click the icon to view the users with whom you shared the list. If the list was shared with you, then you can click the icon to view who shared the list.
- **Employee Thumbnails** - Up to four thumbnails appear. If you have more than four employees in the list, then the number of additional employees displays to the right of the fourth image. Clicking a thumbnail opens the list details page.
- **Modified** - This displays the date on which the list was most recently modified.
- **Options** - The following options are available in the drop-down:
  - **Share** - Click **Share** to share the list. This opens the Share List with Others pop-up. Select the users with whom to share the list. Enter a message that will display

to the users with whom the list is shared. ***Note:*** *You can only share lists that you own. You cannot share a list that was shared with you.*

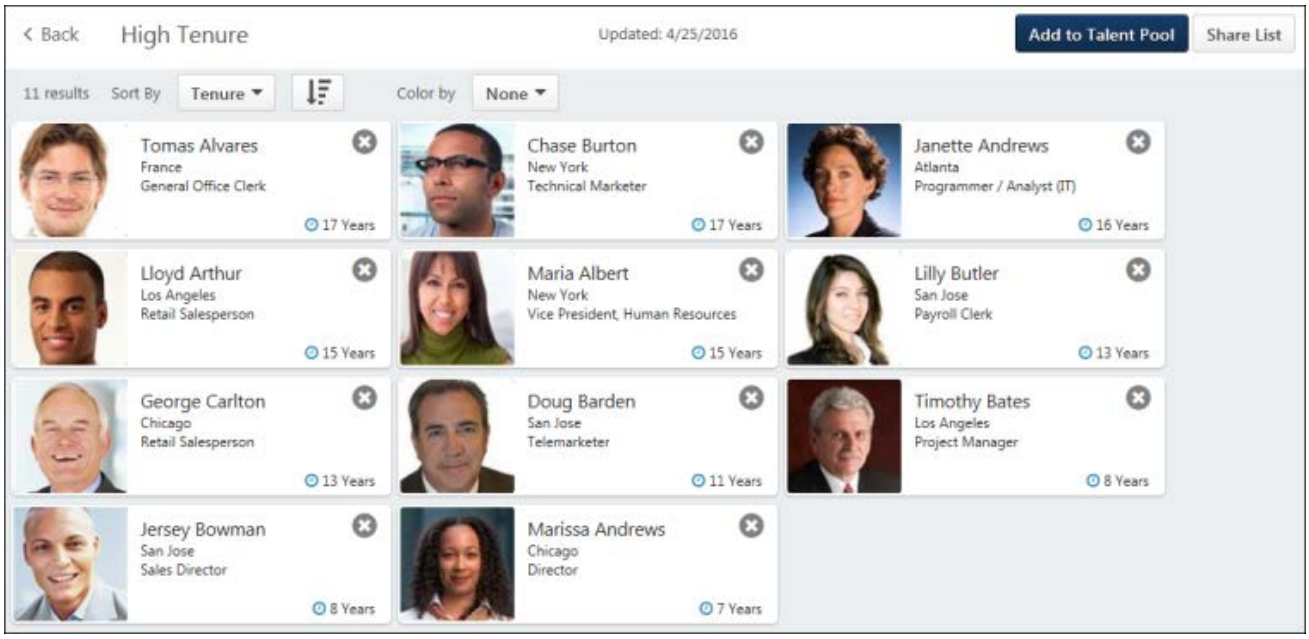


- Delete - Click **Delete** to delete the list. If this is a list that you have shared, then the list is also deleted from the users with whom the list was shared.

View List Details

The details of the list can be viewed by clicking the list name. This opens the details page for the list. The list details shows the name of the list, the last updated date, and options for adding to a talent pool and sharing the list. You can also apply filters and access an employee's profile page.

Click **Back** to return to the My Lists page.



Updated Date

The date that the list was most recently updated displays to the right of the list title. If this is a shared list, it will show the date on which the list was shared and the user that shared the list.

Sorting/Succession Options

The following sorting options are available:

- **Sort By** - You can sort the list by last name or first name. If tenure is enabled by the administrator in **View People Preferences**, then you can also sort by tenure. The list is sorted by last name by default.
- **Order Ascending/Descending** - You can sort the lists in ascending or descending order. The order is based on the **Sort By** option you have selected. For example, if **Title** is selected, then the list is sorted in ascending or descending order by list title.
- **Color by** - For portals with Succession, you can identify employees by a succession metric. The metrics that display are the default metrics defined by the administrator in **View People Preferences**. When a metric is selected, the results are colorized to identify each employee by their rating for the metric. If an employee is not rated, then they display with gray diagonal stripes in the color bar. ***Note:*** *As with existing functionality, the colors for succession metrics are defined in* ***Custom Field Administration*** *when configuring the Succession custom field.*

Add to Talent Pool

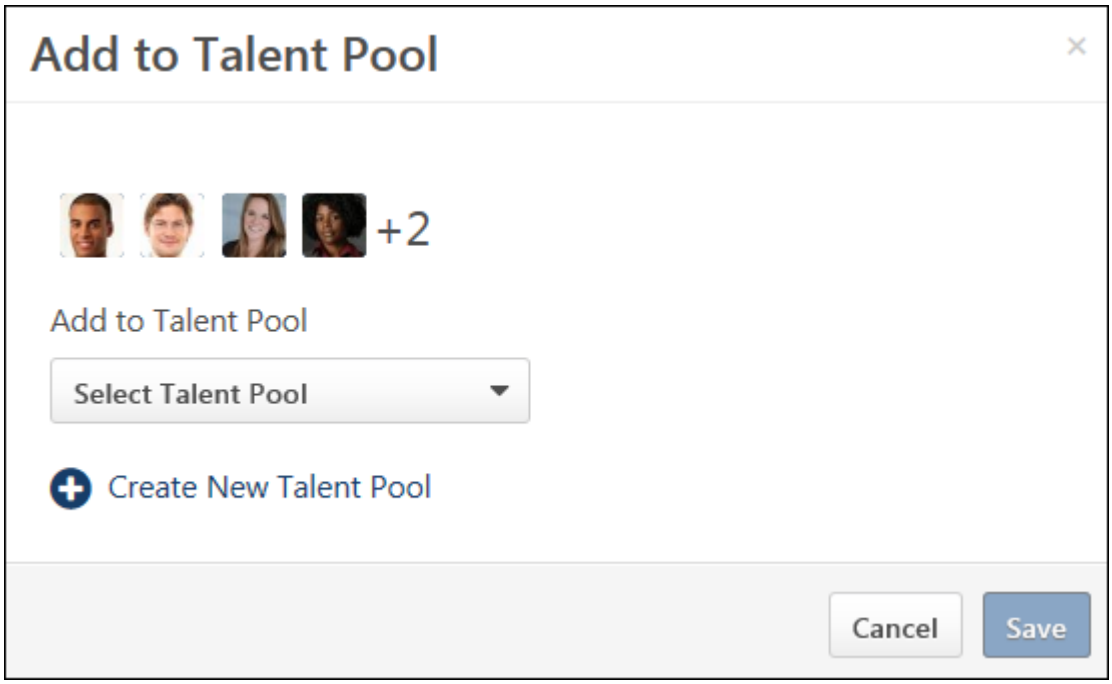
This option allows you to add the employees in the list to a talent pool. You must have permission to manage talent pools in order to add employees to a talent pool.

Note: *Before adding employees to the talent pool, you can remove any employees that you do not want to include on the list by clicking the Remove icon in the upper-right corner of their employee card.*

To add to a talent pool:

1. Click **ADD TO TALENT POOL**. This opens the Add to Talent Pool pop-up.
2. Select an existing talent pool from the **Select Talent Pool** drop-down, if there is at least one talent pool created.
3. Or, click **Create New Talent Pool** to create a new talent pool. Enter a title for your talent pool in the title text box, up to 100 characters.
4. Click **SAVE** to add the employees to the talent pool.

Note: *Once a talent pool is created or users are added to a talent pool, you can view the talent pool from the Manage Talent Pools page. This page can be accessed from the associated navigation tab, which is configured by an administrator.*



Share List

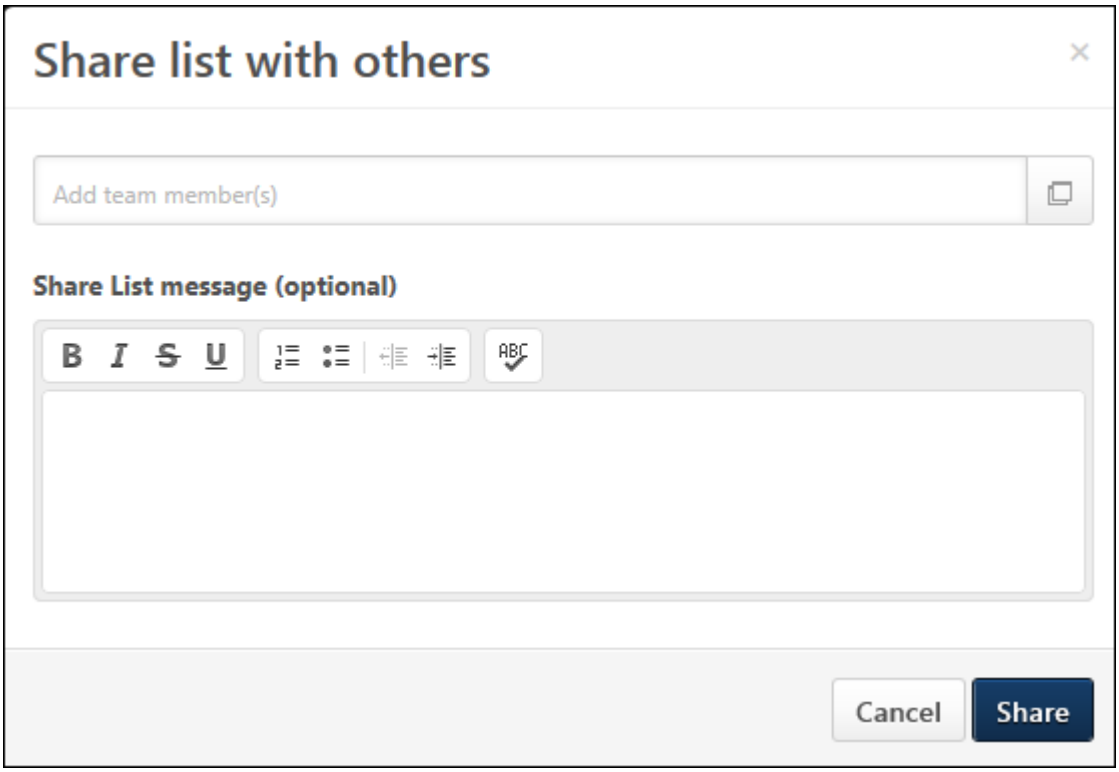
This option allows you to share the list with other users. You must have permission to view View People in order to share lists.

To share a list:

1. Click **SHARE LIST**. This opens the Share List with Others pop-up. If the list has been shared before, then the users with whom the list has been shared displays at the top of the pop-up, and you can click **View All** to view all the users with whom the list has been shared.
2. Select the users to add by entering key words into the predictive search field and selecting the users. Or, search for and select users from the Select A User pop-up. Users must be added to the recipient list one at a time. ***Note:*** *The users that are available to select are the users that are within your permission constraints.*
3. Check the **Notify All** box to send the email to all users with whom you are currently sharing the list and have previously shared the list. If you do not check the box, then the email is only sent to the users with whom you have just selected to share the list. ***Note:*** *This option only displays if a list has already been shared.*
4. Enter a message in the **Share List Message** field. This is optional.
5. Click **SHARE** to share the list. An email is sent to the users in the shared list. If you included a message, then the message displays in the email. The subject of the email is hard-coded as "I Shared [Name of List] on View People." A link to the shared list is automatically included in the email. Recipients cannot modify the list. Recipients can view the employee profile page of the employees in the list, as well as any succession metrics and the team hierarchy.

Lists can be shared multiple times. Follow the steps above to share the list again.

Once a list is shared, a Shared with icon displays on the My Lists page. Hover over the link to view the users with whom the list has been shared.



Remove Shared Users

You can remove users with whom you have shared the list by clicking the **View All** link in the pop-up. Then, click the X to the right of the user's name. This removes the shared user from list.

Delete Shared List

If you delete the list, then the list is also removed from any users with whom you have shared the list.

Employee Cards

Each employee in the list displays on the page. The following information displays in the employee cards:

- Photo
- Name
- [Organizational Unit 1] - This displays if an organizational unit (OU) is configured to display by the administrator in View People Preferences. The OU will be an active OU for the portal.
- [Organizational Unit 2] - This displays if an organizational unit (OU) is configured to display by the administrator in View People Preferences. The OU will be an active OU for the portal.

- Remove - The X option in the upper-right corner allows you to remove the employee from the list.
- Tenure - The tenure displays in the lower-right corner of the card. The tenure displays as a number of years and is calculated from the user's hire date to the current date.
- Color Bar - If the **Color by** filter is set, then a color displays on the right side of the card. The color that displays corresponds to the employee's metric rating for the succession metric that is selected in the **Color by** filter.

View Employee Profile Page

You can view the employee's profile page by clicking anywhere in the card except for on the remove option. This opens the profile page for the employee. *See* **View People Page - View Employee Profile** on page 201 *for additional information.*

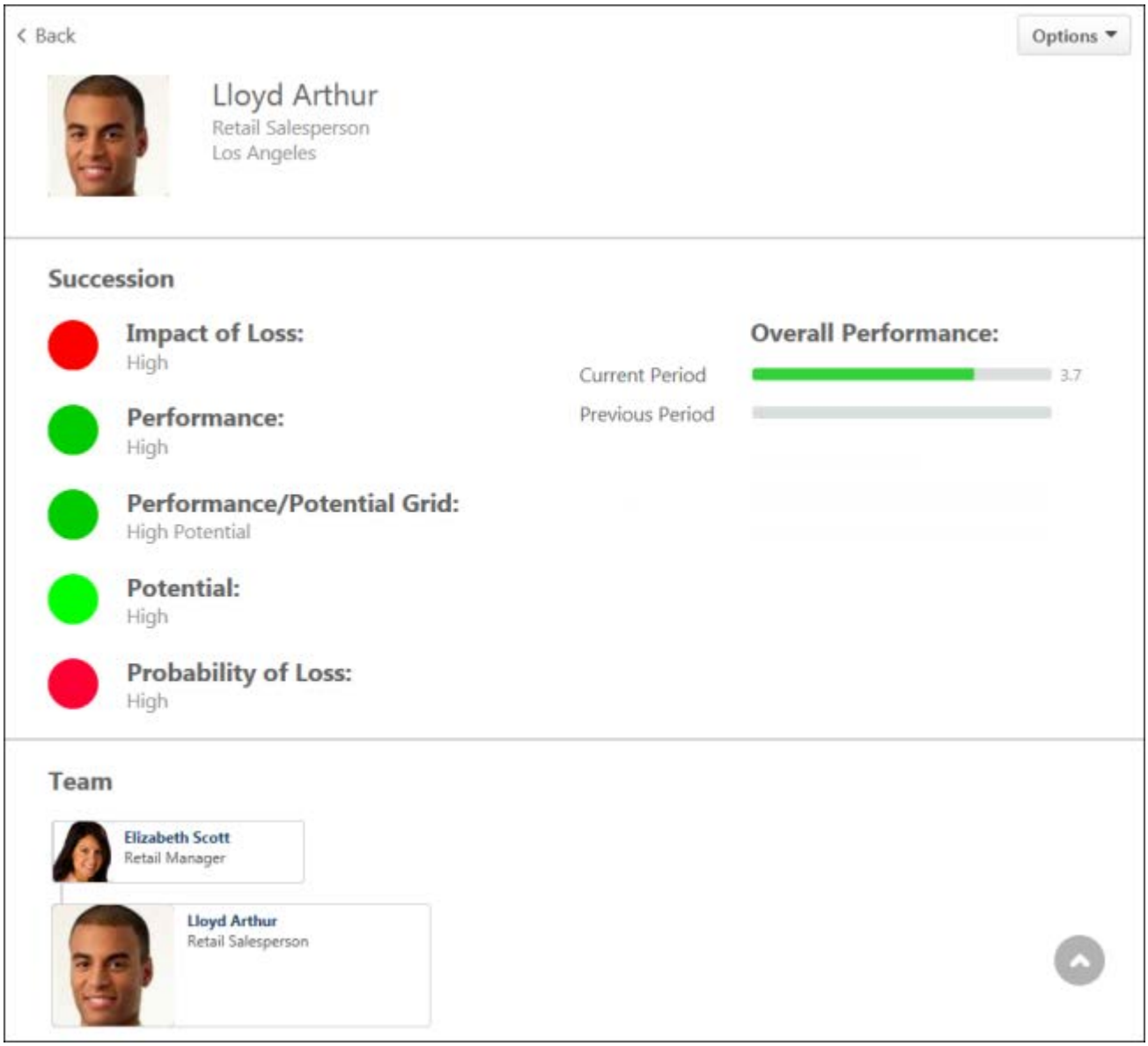
View People Page - View Employee Profile

To view an employee's details page, click any employee's card. From the profile page, you can do the following:

- View succession metric ratings
- View overall current performance rating
- View the employee's team organization, such as their manager's name and position
- Add the employee to a talent pool
- Add the employee to another list
- Create a new list and add the employee to the new list

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Talent Pools - Manage	Grants ability to create and manage Talent Pools. This permission also grants access the ability to add candidates to a job requisition. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration



General Employee Details

This section displays the following information from the employee card:

- Photo
- Name
- [Organizational Unit 1] - This displays if an organizational unit (OU) is configured to display by the administrator in View People Preferences. The OU will be an active OU for the portal.
- [Organizational Unit 2] - This displays if an organizational unit (OU) is configured to display by the administrator in View People Preferences. The OU will be an active OU for the portal.

Options

The **OPTIONS** drop-down allows you to add the employee to a talent pool or to a list.

Add to Talent Pool

This option allows you to add the employee to a talent pool. You must have permission to manage talent pools in order to add employees to a talent pool.

To add to a talent pool:

1. Click **Add to Talent Pool**. This opens the Add to Talent Pool pop-up.
2. Select an existing talent pool from the **Select Talent Pool** drop-down, if there is at least one talent pool created.
3. Or, click **Create New Talent Pool** to create a new talent pool. Enter a title for your talent pool in the title text box, up to 100 characters.
4. Click **SAVE** to add the employee to the talent pool.

Note: *Once a talent pool is created or the user is added to a talent pool, you can view the talent pool from the Manage Talent Pools page. This page can be accessed from the associated navigation tab, which is configured by an administrator.*

Add to List

Click **Add to List** to add the employee to a list. This opens the Add to List pop-up. You can create a new list or select an existing list if there is at least one list created. For new lists, you can name the list up to 100 characters. Click **SAVE** to add the employee to the list.

Succession Metric Ratings

This section displays the employee's data from the succession metric filters, if available. The metric rating displays to the right of a color-coded circle. The color of the circle is determined by the value of the metric rating.

Overall Performance Rating

This section displays the employee's most current performance review rating, as well as the second most recent review rating.

Team Details

This section displays the team hierarchy for the employee. This information is obtained from the Universal Profile > Bio > About page.

Master List of New Report Fields

This page provides the master list of new report fields for the April '16 release.

Compensation

FIELD NAME	SECTION	CUSTOM REPORT NAME
Currency ID	Compensation	Compensation Custom Report
Labor Hours	Compensation	Compensation Custom Report
Salary	Compensation	Compensation Custom Report
Salary Effective Date	Compensation	Compensation Custom Report
Salary Last Updated By Task Name	Compensation	Compensation Custom Report
Salary Last Updated By User Name	Compensation	Compensation Custom Report
Salary Last Updated Date	Compensation	Compensation Custom Report
Wage Type	Compensation	Compensation Custom Report

Core

FIELD NAME	SECTION	CUSTOM REPORT NAME
Badge Status	User	All custom reports with User section
User Creation Date	User	All custom reports with User section
User GUID	User	All custom reports with User section

Learning

FIELD NAME	SECTION	CUSTOM REPORT NAME
Ability to Select Session Admins and Managers	Transcript	All custom reports with Transcript section
Ability to Select Sessions End Users	Transcript	All custom reports with Transcript section
Availability Type	Training	All custom reports with Training section
Curriculum Completion Percentage	Transcript	All custom reports with Transcript section
Electronic Signature Message	Training	All custom reports with Training section
Electronic Signature Required	Training	All custom reports with Training section

FIELD NAME	SECTION	CUSTOM REPORT NAME
Latest Version	Transcript	All custom reports with Transcript section
LO Possible Credit	Certifications	All custom reports with Certifications section
Secondary Last Name	Transaction	All custom reports with Transaction section
Secondary First Name	Transaction	All custom reports with Transaction section
Session Roster Comments	Training	All custom reports with Training section
Training Availability	Training	All custom reports with Training section
Training Availability Include Subordinates	Training	All custom reports with Training section
Training Availability Pre-Approved	Training	All custom reports with Training section
Training Availability Register Upon Approval	Training	All custom reports with Training section
Training Deactivation Date	Training	All custom reports with Training section
Training Purpose	Training	All custom reports with Training section
Training Request Form	Training	All custom reports with Training section
Training Version Comments	Training	All custom reports with Training section
Training Version Effective Date	Training	All custom reports with Training section
Training Version End Date	Training	All custom reports with Training section
Training Version Start Date	Training	All custom reports with Training section
User Course Review Desc	Transcript	All custom reports with Transcript section
User Course Review Title	Transcript	All custom reports with

FIELD NAME	SECTION	CUSTOM REPORT NAME
		Transcript section
User Part Attendance	Transcript	All custom reports with Transcript section

Onboarding

FIELD NAME	SECTION	CUSTOM REPORT NAME
Document Folder Name	Form	Onboarding Custom Report
Employer Assignee Email	Onboarding	Onboarding Custom Report
Employer Assignee ID	Onboarding	Onboarding Custom Report
Employer Assignee Name	Onboarding	Onboarding Custom Report
Form Active	Form	Onboarding Custom Report
Form Approval Comment	Form Approval	Onboarding Custom Report
Form Approval Request Completed Date	Form Approval	Onboarding Custom Report
Form Approval Request Received Date	Form Approval	Onboarding Custom Report
Form Approval Request Title	Form Approval	Onboarding Custom Report
Form Approval Status	Form Approval	Onboarding Custom Report
Form Approver Email	Form Approval	Onboarding Custom Report
Form Approver ID	Form Approval	Onboarding Custom Report
Form Approver Name	Form Approval	Onboarding Custom Report
Form Description	Form	Onboarding Custom Report
Form E-Signature Date	Form	Onboarding Custom

FIELD NAME	SECTION	CUSTOM REPORT NAME
		Report
Form E-Signature Location	Form	Onboarding Custom Report
Form E-Signature ID	Form	Onboarding Custom Report
Form E-Signature Name	Form	Onboarding Custom Report
Form ID	Form	Onboarding Custom Report
Form Question	Form	Onboarding Custom Report
Form Question ID	Form	Onboarding Custom Report
Form Question Response	Form	Onboarding Custom Report
Form Submit Date	Form	Onboarding Custom Report
Form Task ID	Form	Onboarding Custom Report
Form Task Instructions	Form	Onboarding Custom Report
Form Task Title	Form	Onboarding Custom Report
Form Title	Form	Onboarding Custom Report
Integration Provider	Onboarding	Onboarding Custom Report
Navigation Tab Extension	Onboarding	Onboarding Custom Report
Onboarding Future Manager Email	Onboarding	Onboarding Custom Report
Onboarding Future Manager ID	Onboarding	Onboarding Custom Report
Onboarding Future Manager Name	Onboarding	Onboarding Custom

FIELD NAME	SECTION	CUSTOM REPORT NAME
		Report
Onboarding Future Approver Email	Onboarding	Onboarding Custom Report
Onboarding Future Approver ID	Onboarding	Onboarding Custom Report
Onboarding Future Approver Name	Onboarding	Onboarding Custom Report
Onboarding Progress	Onboarding	Onboarding Custom Report
Onboarding Status	Onboarding	Onboarding Custom Report
Onboarding Task Assignee Email	Onboarding	Onboarding Custom Report
Onboarding Task Assignee ID	Onboarding	Onboarding Custom Report
Onboarding Task Assignee Name	Onboarding	Onboarding Custom Report
Onboarding Task Assignment Date	Onboarding	Onboarding Custom Report
Onboarding Task Due Date	Onboarding	Onboarding Custom Report
Onboarding Task ID	Onboarding	Onboarding Custom Report
Onboarding Task Status	Onboarding	Onboarding Custom Report
Onboarding Task Title	Onboarding	Onboarding Custom Report
Onboarding Task Type	Onboarding	Onboarding Custom Report
Onboarding Type	Onboarding	Onboarding Custom Report
Onboarding User Future Division	Onboarding	Onboarding Custom Report
Onboarding User Future Location	Onboarding	Onboarding Custom

FIELD NAME	SECTION	CUSTOM REPORT NAME
		Report
Onboarding User Future Position	Onboarding	Onboarding Custom Report
Onboarding Workflow Active	Onboarding	Onboarding Custom Report
Onboarding Workflow Title	Onboarding	Onboarding Custom Report
Start Date	Onboarding	Onboarding Custom Report

Performance

FIELD NAME	SECTION	CUSTOM REPORT NAME
[Name of Category] (Category)	Competency	All custom reports with Competency section
Competency Description	Competency	All custom reports with Competency section
Marked As Final	Goals	All custom reports with Goals section
Marked As Final - Date	Goals	All custom reports with Goals section
Success Descriptors Title	Goals	All custom reports with Goals section
Success Descriptors Description	Goals	All custom reports with Goals section

Recruiting

FIELD NAME	SECTION	CUSTOM REPORT NAME
Requisition Cost Center	Requisition	Recruiting Custom Report
Requisition Keywords	Requisition	Recruiting Custom Report

User Fields in Custom Reporting

With this enhancement, the following fields are added to the User section in all custom reports that include a User section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Badge Status	The status of the badge (Active, Inactive, Deleted).	Text
User Creation Date	The date the user record was created.	Date
User GUID	The User GUID used for converting new hires to users.	Text

Support for OU Localization in Standard Reports

With this enhancement, standard reports that contain organizational units (OU) will be updated to display the localized value for the OU. If there is no localized value for the OU name, then the default value displays for the OU name.

Impacted Reports

The following standard reports are impacted by this enhancement, as they contain OUs in the report output:

Billing Reports

- Library Registrations Report
- Processing Fees Report

Compensation Reports

- Compensation EEO Report
- Compensation Modeling Report
- Compensation Promotion Report
- Deferral Payments Report
- Employee Salary Range Report
- Individual Targets Report

Connect Reports

- Connect Community Report
- Connect Profile Comments Report
- Connect Topic Expert Report
- Connect Topic Moderator Report

Instructor Led Training Reports

- Reservation Summary
- Session Withdrawal Report

Performance Reports

- Development Plan Exception Report
- Development Plan Status Report
- Goal Exception Report
- Goal Progress Report
- Goal Status Report
- Performance Review Details Report
- Performance Review Report
- Task User Status Report

Recruitment Reports

- Applicant Compliance Report
- Cost per Hire Report
- Recruiting Agency Statistics Report
- Referral Statistics Report
- Requisition Detail Report
- Scheduled Interviews Report

Succession Reports

- Job Pool Task Report
- Resume and Career Preferences Report
- Resume Section Details Report
- SMP External Candidate Report
- SMP PowerPoint Template Report
- SMP Resume/Feedback Report
- SMP Succession Report
- SMP Survey Step Report
- Succession Details by Incumbent Report
- Succession Details by Successor Report
- Succession Management Plan Report
- Succession Metric Ratings Report
- Talent Pool Details Report

System Reports

- OU Hierarchy Report
- User OUs and Groups Report
- User Record as of a Date Report
- User Record Audit Report
- User Transcript Audit Report

Track Employees Reports

- Custom Form Data Report
- Employee No Show Details Report
- Employee Transcripts Report
- Past Due Report
- Past Requests Report
- Pending Requests Report
- Records Report
- Session Withdrawal Report

Training Reports

- Acknowledgement Report

- Certification (old certification model)
- Certification Details (new certification model)
- Certification Summary Report (new certification model)
- Curriculum Report
- Divisional Training Report
- Enterprise Past Due Training Report
- Enterprise Training Report
- Required/Suggested Training Report
- SCORM 2004 Course Progress Chart
- Training Unit Redemption Report
- Training Registration Details Report

Edge

Edge Integrate

Cornerstone Edge Integrate Overview

Cornerstone Edge Integrate enables organizations to quickly and easily integrate their Cornerstone system with other workforce systems. This includes recruiting tools, such as Broadbean and Multiposting, learning tools, such as WebEx and GoToMeeting, and social tools, such as Facebook and Twitter.

Cornerstone Edge Integrate has two components:

- Marketplace - The Marketplace service enables administrators to conveniently browse and discover all available third-party integrations and purchase or try the desired integrations.
- Integrations - Once an integration is purchased or a trial is initiated for the integration, the Integrations service enables administrators to configure, enable, and disable their third-party integrations. This greatly simplifies the implementation process by reducing implementation times and enabling administrators to enable and configure the integrations.

Available Integrations

There are two types of integrations that are available for the Cornerstone system, Edge Ready and Packaged.

- Edge Ready integrations can be purchased, installed, and configured by administrators within Edge Integrate. On the Marketplace page, integrations that are Edge Ready have the Edge icon displayed next to their name.
- Packaged integrations must be purchased, installed, and configured through the previously existing channels, such as Client Executives and Global Product Support (GPS).

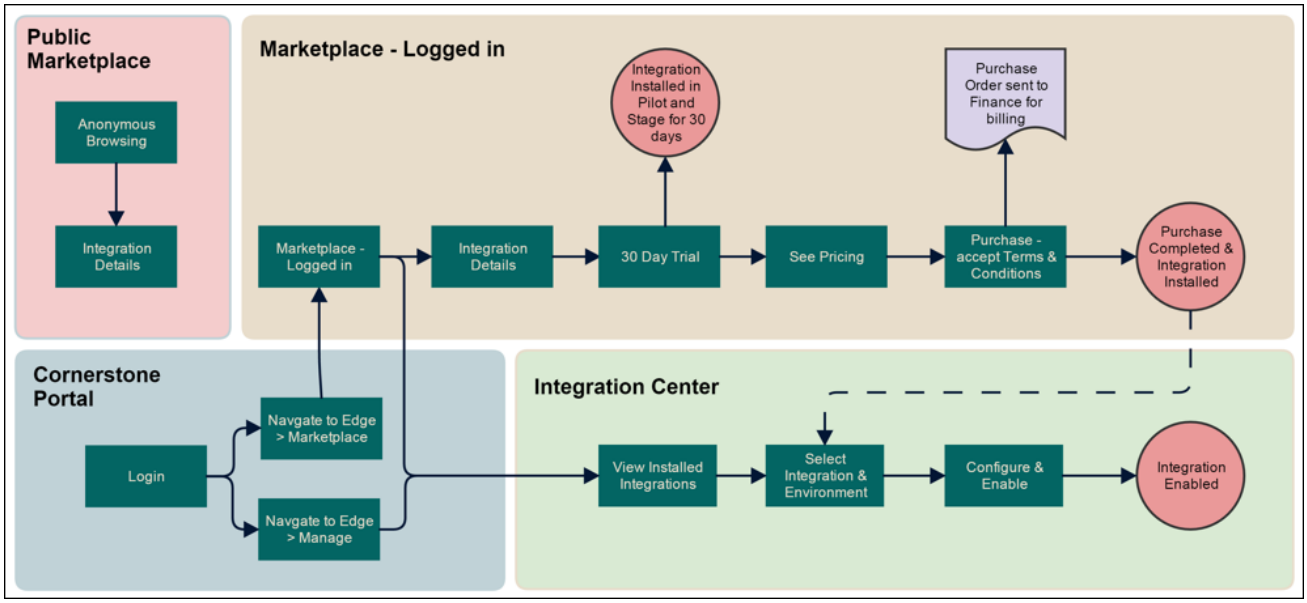
Edge Ready Integrations

1. Virtual Instructor Led Training
   A. WebEx Meeting
   B. WebEx Training
   C. Adobe Connect/Meeting
   D. Adobe Seminar Room
   E. Citrix Go-To-Meeting
2. Recruiting
   A. Multiposting
   B. Broadbean External Sourcing
   C. CIC Plus
   D. FADV Background Check and Drug Screening
3. Social/Connect
   A. Twitter
   B. Facebook

Packaged Integrations

1. Core
   A. Workday
2. Virtual Instructor Led Training
   A. Skype for Business (formerly called Microsoft Lync)
3. Extended Enterprise
   A. CyberSource
4. Recruiting
   A. Broadbean Job Posting
   B. HireRight
   C. HireVue
   D. SHL Talent Measurement
5. Onboarding
   A. Tracker I-9 and E-Verify

Workflow



Use Cases

1. Michael is an administrator at Acme Corp. He accesses the Marketplace from his Pilot portal to view which integrations are available.
2. Michael notices that an integration is available for a third-party tool that Acme Corp currently uses. He views the details of the integration and realized that this integration will add extremely valuable functionality to his Cornerstone portal.
3. Michael decides to enable a free 30-day trial of the integration in the Pilot portal. He accesses the Integrations page and quickly configures and enables the integration.

4. After a week of using the integration in non-production environments, Michael decides that this integration is valuable to Acme Corp. He accesses the Marketplace from his Production portal and quickly purchases the integration.
5. Michael accesses the Integrations page and configures the integration by choosing to copy the configuration settings from the Pilot portal.
6. After configuring the integration, Michael enables the integration, and it is automatically available in his production portal.

Considerations

In order to support the use of Edge Integrate, a new user is added to the system in the Cornerstone Administrator security role. The Username and User ID for this user is edgeuser, and this user is available when searching users from the Admin > Users page. In order for the Edge Integrate service to function properly, this user must remain active.

The Marketplace displays all available integrations, including integrations that are associated with Cornerstone modules that the organization may not have purchased.

Administrators can initiate a 30-day trial period for an integration in all non-production environments.

- During a trial period, the integration can only be enabled in non-production environments.
- Only one trial period is permitted for each integration.
- Trial periods cannot be extended.
- At the end of the trial period, the functionality is disabled until the integration is purchased.

When a free trial is initiated or when an integration is purchased, the integrations must be configured and enabled before the functionality is available within the portal. Even though an integration may be installed in multiple environments, the integration must be configured and enabled in each environment in order for the functionality to be available in the environment.

All integration fees are charged annually.

Implementation

Edge Integrate is only available for organizations whose portals are supported by Cornerstone. For these portals, Edge Integrate is automatically enabled. For organizations that are supported by a Cornerstone reseller, Edge Integrate is disabled and it is not available.

Upon release, the Edge Marketplace - Manage and Edge Integrations - Manage permissions are automatically added to the default System Administrator role.

For organizations that have a previous integration that is now offered as an Edge Ready integration, such as WebEx or Adobe Connect, the integration appears as Purchased in the Marketplace, and administrators can update the integration settings via Integrations. When

the organization's contract ends, the organization must accept the new recurring fee for the integration in order to continue using it.

Glossary

- Marketplace (Edge) - The Marketplace service enables administrators to conveniently browse and discover all available third-party integrations and purchase or try the desired integrations.
- Integrations (Edge) - Once an integration is purchased or a trial is initiated for the integration, the Integrations service enables administrators to configure, enable, and disable their third-party integrations. This greatly simplifies the implementation process by reducing implementation times and enabling administrators to enable and configure the integrations.

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

Admin > Users - EdgeUser

In order to support the use of Edge Integrate, a new user is added to the system in the Cornerstone Administrator security role. The Username and User ID for this user is edgeuser, and this user is available when searching users from the Admin > Users page. In order for the Edge Integrate service to function properly, this user must remain active.

Marketplace

Marketplace - Browse Edge Integrations

The Marketplace service enables administrators to conveniently browse and discover all available third-party integrations and purchase or try the desired integrations.

To browse all available third-party integrations, go to ADMIN > TOOLS > EDGE > MARKETPLACE. The Marketplace opens in a new browser tab.

When using any of the Edge services, such as Marketplace or Integrations, administrators can navigate between the services by clicking the Menu icon in the upper-right corner of the page and selecting the desired service:

- Marketplace - *See* **Marketplace** on page 221 *for additional information.*
- Integrations - *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

Filter by Category

By default, the Marketplace displays all of the available integrations. This includes integrations from all of Cornerstone's modules.

To filter the integrations to only display integrations from a specific category, such as Virtual Classroom or Job Posting, click the appropriate category. When multiple filters are selected, the page displays integrations that match any of the selected filters.

To remove a category filter that you have selected, click the Remove icon to the right of the selected filter. To remove all selected category filters, click the **All** link at the top of the Categories section.

Filter by Type

There are two types of integrations that are available for the Cornerstone system, Edge Ready and Packaged.

- Edge Ready integrations can be purchased, installed, and configured by administrators within Edge Integrate. On the Marketplace page, integrations that are Edge Ready have the Edge icon displayed next to their name.
- Packaged integrations must be purchased, installed, and configured through the previously existing channels, such as Client Executives and Global Product Support (GPS).

By default, the Marketplace displays both types of integrations so that administrators can view all of the integrations that are available. This includes integrations that cannot be purchased directly from the Marketplace.

To filter the integrations to only display a specific type of integration, such as Edge Ready, click the appropriate type. When multiple filters are selected, the page displays integrations that match any of the selected filters.

To remove a type filter that you have selected, click the Remove icon ✖ to the right of the selected filter.

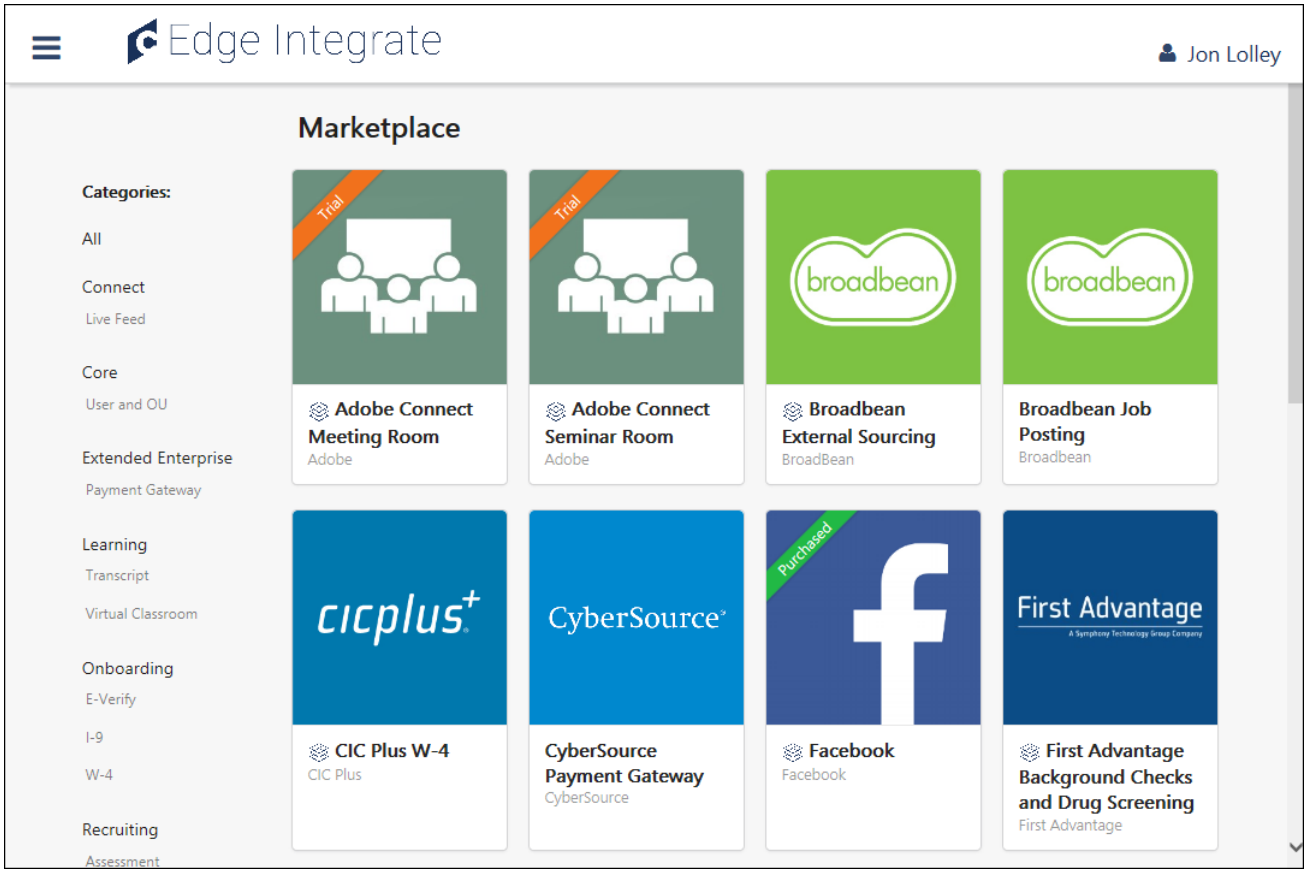
Trial/Purchased

If the integration has been purchased or if a trial of the integration has been initiated for the portal, then a Purchased or Trial banner is displayed on the integration tile.

View Integration Details

To view a brief overview of an integration, hover the computer cursor over the integration tile.

To view the details of an integration, select the integration tile. This opens the Integration Details page, which displays all of the details of the integration and enables the administrator to enable a trial of the integration or purchase the integration. *See* **Marketplace - View Edge Integration Details** on page 224 *for additional information.*



Marketplace - View Edge Integration Details

The Integration Details page displays information about the integration, including information about the vendor, an overview of the functionality provided by the integration, pricing and setup information, and an opportunity to purchase or try the integration.

To view the details of an Edge integration, go to ADMIN > TOOLS > EDGE > MARKETPLACE. Then from the Marketplace page, select the appropriate Edge integration.

When using any of the Edge services, such as Marketplace or Integrations, administrators can navigate between the services by clicking the Menu icon ☰ in the upper-right corner of the page and selecting the desired service:

- Marketplace - *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- Integrations - *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

Integration Header

At the top of the page, an overview of the integration is displayed, including the following information:

- Title
- Price per year
- Vendor - The company that is associated with the integration is displayed below the integration title.
- Categories - The categories associated with the integration are displayed below the integration provider.

Purchase/Try it Free

Depending on the environment from which Marketplace is being accessed (i.e., Pilot, Stage, Live), administrators can purchase the integration or initiate a free 30-day trial.

- **PURCHASE** (Production Environment) - When accessing Marketplace from a Production portal, administrators have the option to purchase an Edge Ready integration. Once the Edge Ready integration is purchased, administrators must then configure and enable the integration from the Integrations configuration center. ***Note:*** *The Purchase option is displayed and administrators must complete the Purchase*

process even if there is no cost associated with the integration. This is because the Purchase action enables the integration to be configured and enabled in the Integrations configuration center.
  - If a trial has been enabled for the portal, then the system displays the number of days remaining in the trial. This is displayed above the **PURCHASE** button.
  - *See* **Edge Integration - Purchase** on page 231 *for additional information.*
- **TRY IT FREE** (Non-production Environment) - When accessing Marketplace from a non-production environment, such as a Pilot or Stage portal, administrators have the option to initiate a free 30-day trial of an Edge Ready integration. Once the trial of the Edge Ready integration is enabled, the trial is available in all non-production environments. However, the integration must be configured and enabled in each environment from the Integrations configuration center. ***Note:*** *Although an integration must be configured and enabled in each environment, administrators are able to import configuration settings from another environment.*
  - *See* **Edge Integration - Try it Free** on page 227 *for additional information.*
- **CONTACT US** (Production or Non-production Environment) - When accessing Marketplace from any production or non-production environment, administrators have the option to contact their Client Executive to learn more about a Packaged (non-Edge Ready) integration. This enables the Client Executive to discuss the integration with the administrator and assist them in configuring and enabling the integration via backend settings.
  - *See* **Edge Integration - Contact Us** on page 235 *for additional information.*

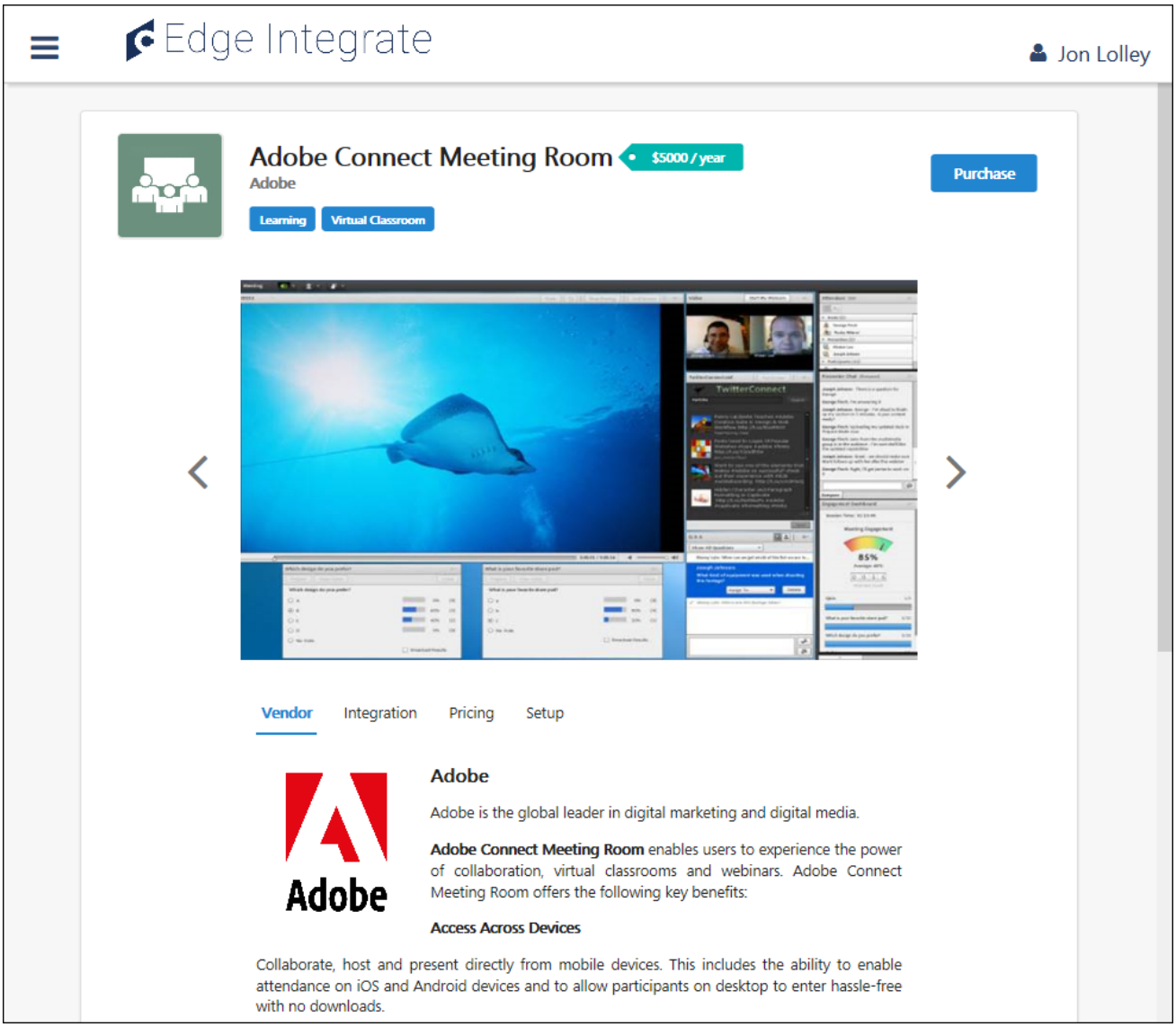
Integration Preview

A preview of the integration is displayed below the Integration Header. This preview displays sample images of how the integration will be used within the system. Select the Arrow icons to the left or right of the preview image to view additional images.

Integration Details

In depth information about the integration is displayed below the Integration Preview. The Integration Details are separated into four sections. To view a different section, click the appropriate tab. The following sections are available:

- Vendor - This section provides general information about the vendor with which the Cornerstone system is integrating. Additional resources may be provided at the bottom of the page.
- Integration - This section provides an overview of the functionality that is added with the integration.
- Pricing - This section provides the cost of the integration and frequently asked questions related to purchasing or trying the integration.
- Setup - This section provides an overview of what is required to configure and utilize the integration.


Edge Integrate
Jon Lolley
Adobe Connect Meeting Room
$5000 / year
Adobe
Purchase
Learning
Virtual Classroom
Vendor
Integration
Pricing
Setup
Adobe
Adobe is the global leader in digital marketing and digital media.
Adobe Connect Meeting Room enables users to experience the power of collaboration, virtual classrooms and webinars. Adobe Connect Meeting Room offers the following key benefits:
Access Across Devices
Collaborate, host and present directly from mobile devices. This includes the ability to enable attendance on iOS and Android devices and to allow participants on desktop to enter hassle-free with no downloads.

Edge Integration - Try it Free

The Marketplace service enables administrators to conveniently browse and discover all available third-party integrations and purchase or try the desired integrations.

When accessing Marketplace from a non-production environment, such as a Pilot or Stage portal, administrators have the option to initiate a free 30-day trial of an Edge Ready integration. Once the trial of the Edge Ready integration is enabled, the trial is available in all non-production environments. However, the integration must be configured and enabled in each environment from the Integrations configuration center.

To enable a free trial for an Edge Ready integration, go to ADMIN > TOOLS > EDGE > MARKETPLACE. From the Marketplace page, select the appropriate Edge integration. Then, from the Integration Details page, select the **TRY IT FREE** button. This button is only available when accessing Marketplace from a non-production portal and when viewing an Edge Ready integration that has not been trialed or purchased in the past.

When using any of the Edge services, such as Marketplace or Integrations, administrators can navigate between the services by clicking the Menu icon in the upper-right corner of the page and selecting the desired service:

- Marketplace - *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- Integrations - *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

There are two types of integrations that are available for the Cornerstone system, Edge Ready and Packaged.

- Edge Ready integrations can be purchased, installed, and configured by administrators within Edge Integrate. On the Marketplace page, integrations that are Edge Ready have the Edge icon displayed next to their name.
- Packaged integrations must be purchased, installed, and configured through the previously existing channels, such as Client Executives and Global Product Support (GPS).

Prerequisites

This section displays the components that are required for using the integration. A free trial should not be enabled unless all of the prerequisites are satisfied.

Terms and Conditions

This section displays the terms and conditions for the trial period.

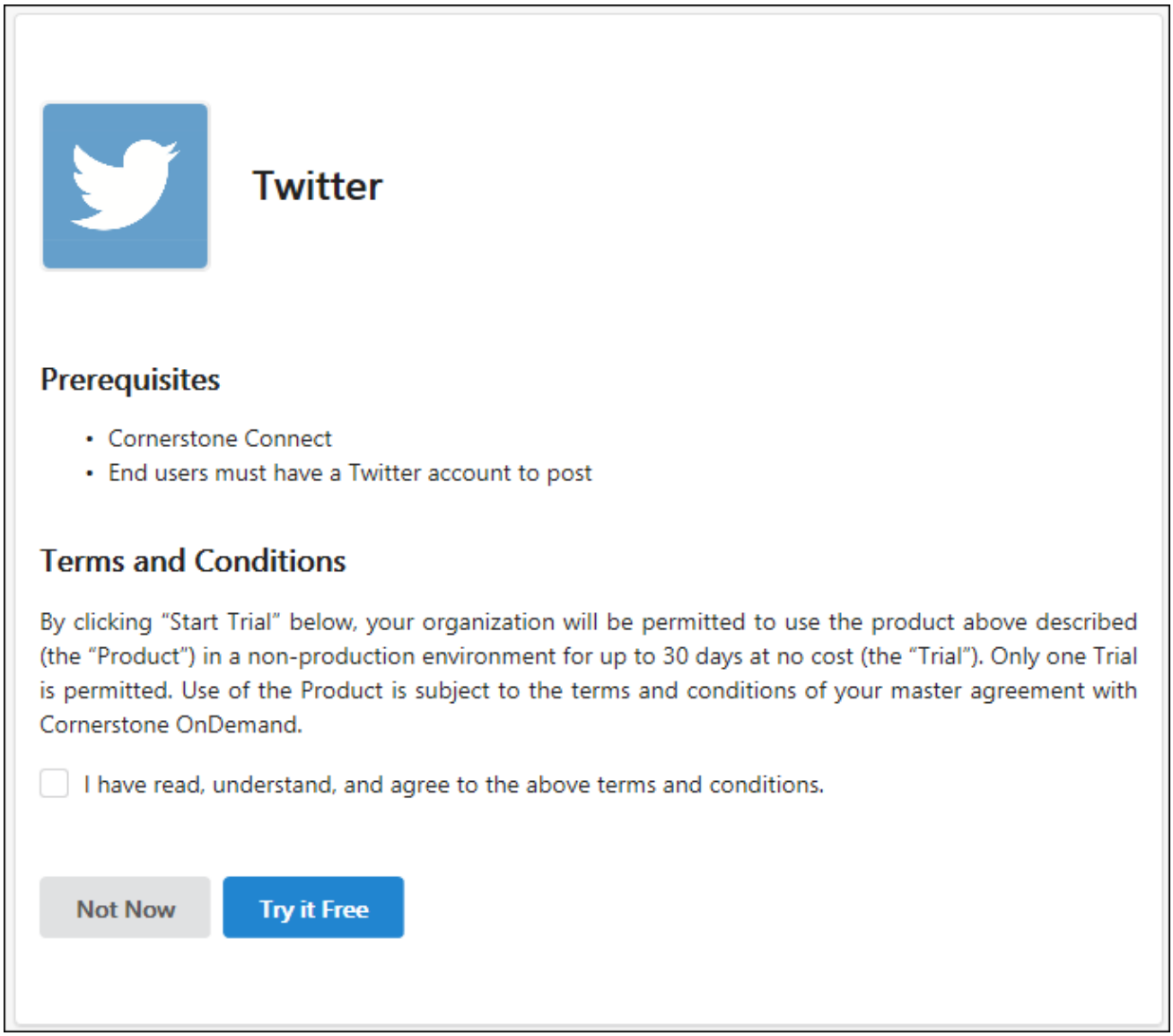
Select the **Acknowledgment** option to agree to the terms and conditions of the trial.

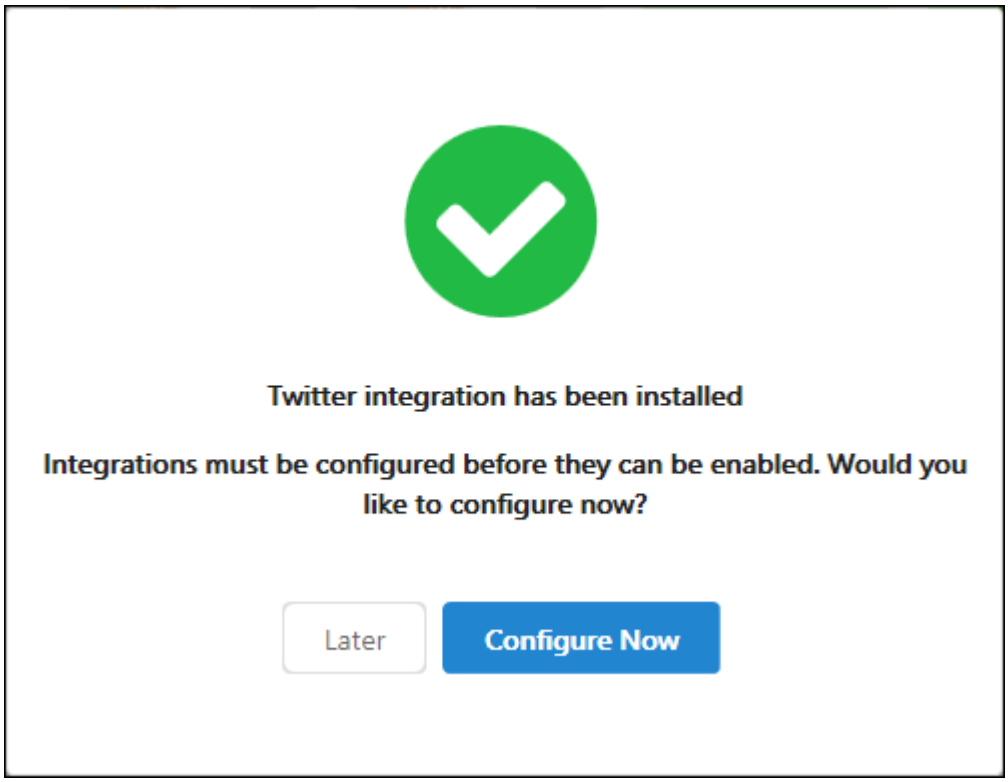
Try it Free/Not Now

Select the **TRY IT FREE** button to initiate the trial period for the integration. The **Acknowledgment** option must be selected before selecting this button. The trial period is available for up to 30 days in all non-production environments, and only one trial period is permitted for each integration. Integrations must be configured and enabled before the functionality is available within the non-production portal. After activating the trial period, a Confirmation pop-up opens with the following options:

- **CONFIGURE NOW** - Select this option to navigate to the Integrations page in order to configure and enable the integration. *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*
- **LATER** - Select this option to return to the Marketplace page without configuring the integration.

Select the **NOT NOW** button to cancel the trial period and return to the Integrations page. *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*


Twitter
Prerequisites
Cornerstone Connect
End users must have a Twitter account to post
Terms and Conditions
By clicking "Start Trial" below, your organization will be permitted to use the product above described (the "Product") in a non-production environment for up to 30 days at no cost (the "Trial"). Only one Trial is permitted. Use of the Product is subject to the terms and conditions of your master agreement with Cornerstone OnDemand.
I have read, understand, and agree to the above terms and conditions.
Not Now
Try it Free


Twitter integration has been installed
Integrations must be configured before they can be enabled. Would you like to configure now?
Later
Configure Now

Edge Integration - Purchase

The Marketplace service enables administrators to conveniently browse and discover all available third-party integrations and purchase or try the desired integrations.

When accessing Marketplace from a Production portal, administrators have the option to purchase an Edge Ready integration. Once the Edge Ready integration is purchased, administrators must then configure and enable the integration from the Integrations configuration center.

To purchase an Edge Ready integration, go to ADMIN > TOOLS > EDGE > MARKETPLACE. From the Marketplace page, select the appropriate Edge integration. Then, from the Integration Details page, select the **PURCHASE** button. This button is only available when accessing Marketplace from a production portal and when viewing an Edge Ready integration that has not already been purchased.

Note: *The Purchase option is displayed and administrators must complete the Purchase process even if there is no cost associated with the integration. This is because the Purchase action enables the integration to be configured and enabled in the Integrations configuration center.*

When using any of the Edge services, such as Marketplace or Integrations, administrators can navigate between the services by clicking the Menu icon in the upper-right corner of the page and selecting the desired service:

- Marketplace - *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- Integrations - *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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There are two types of integrations that are available for the Cornerstone system, Edge Ready and Packaged.

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- Packaged integrations must be purchased, installed, and configured through the previously existing channels, such as Client Executives and Global Product Support (GPS).

Purchase Edge Ready Integration

When the **PURCHASE** button is selected, the purchase process is initiated. This process is separated into three steps:

1. Billing - On this page, enter information about the billing contact and address for the purchase.
2. Company - On this page, enter the address for your organization's headquarters.
3. Confirm - On this page, review the information that has been entered and confirm the purchase.

Once the purchase is confirmed, Cornerstone will send a purchase order to the specified billing contact to complete the transaction. However, the integration is immediately available to be configured and enabled.

Prerequisites

On the Confirm page, this section displays the components that are required for using the integration. An integration **should not** be purchased unless all of the prerequisites are satisfied.

Terms and Conditions

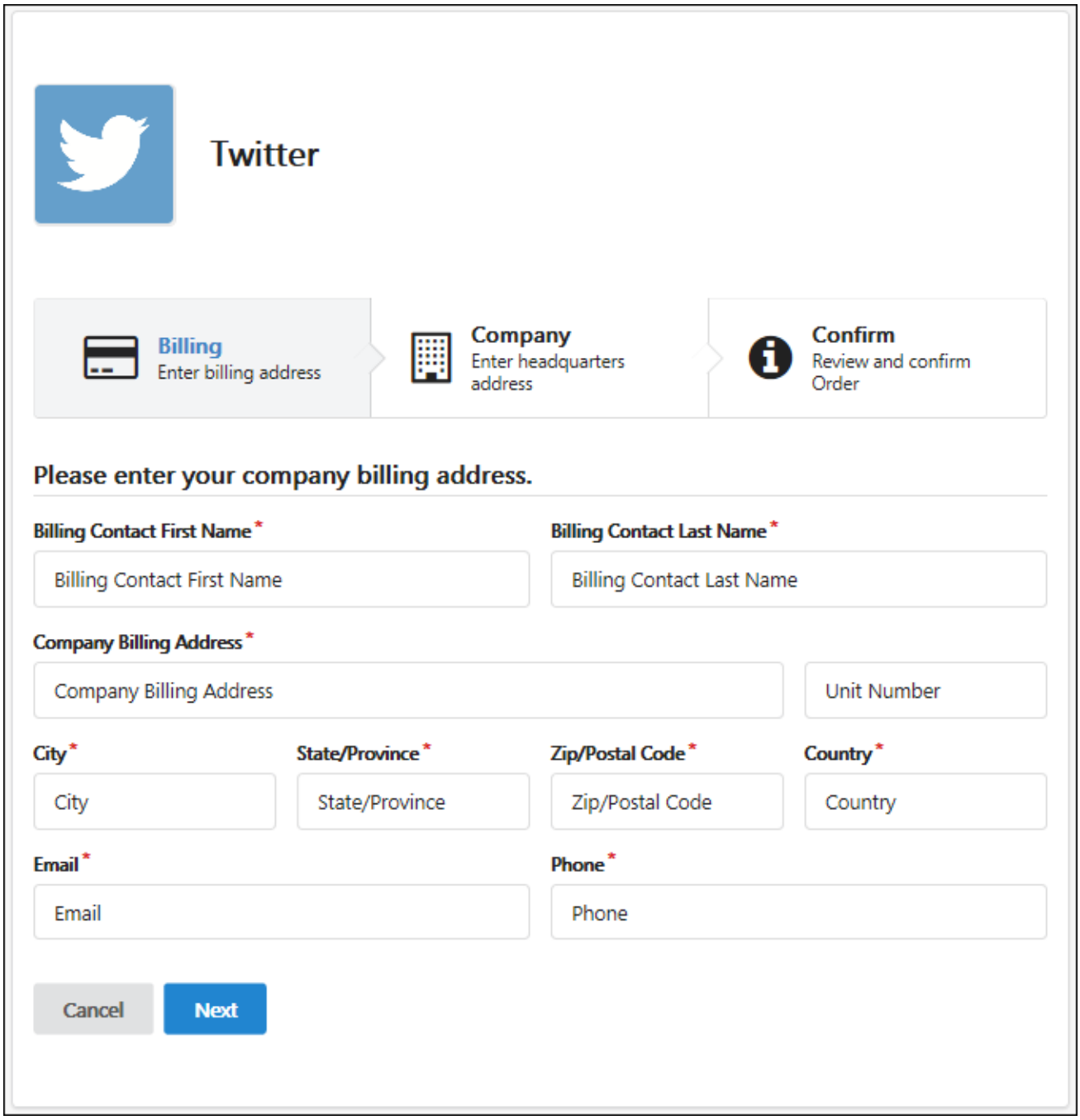
On the Confirm page, this section displays the terms and conditions for the integration purchase.

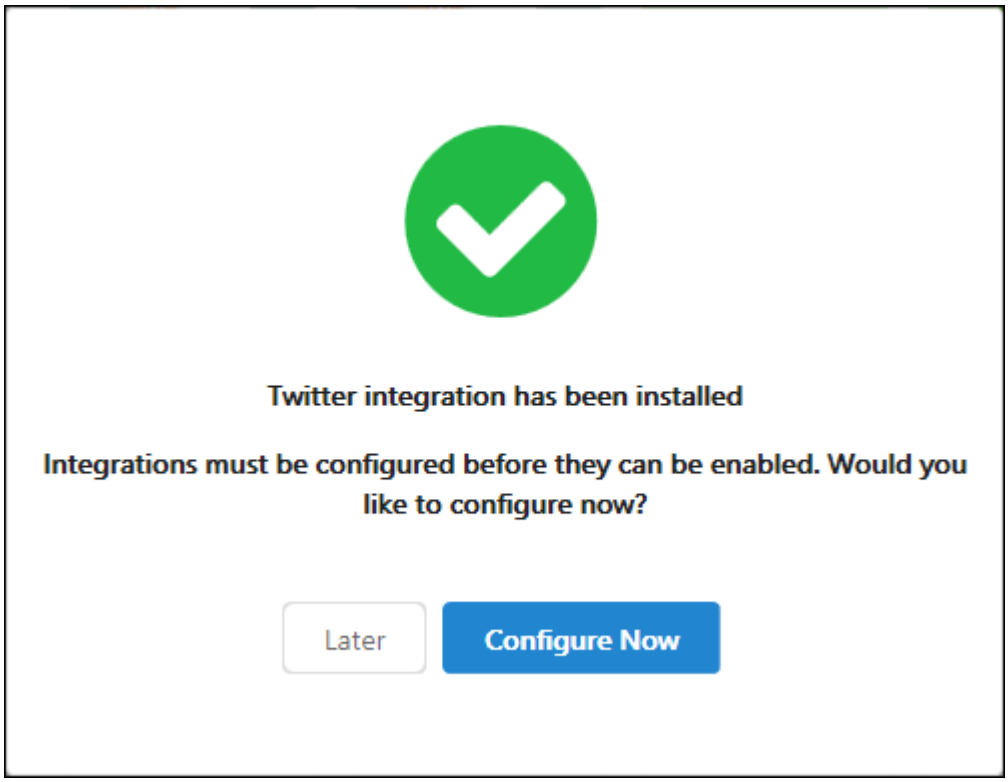
Select the **Acknowledgment** option to agree to the terms and conditions of the purchase.

Purchase/Not Now/Back

On the Confirm page, the following options are available:

- **PURCHASE** - An integration **should not** be purchased unless all of the prerequisites are satisfied. Select this option to submit the purchase order. The **Acknowledgment** option must be selected before selecting this button. A purchased integration is automatically installed in all environments. However, the integration must be configured and enabled within each portal before the functionality is available within the portal. After purchasing the integration, a Confirmation pop-up opens with the following options:
  - **CONFIGURE NOW** - Select this option to navigate to the Integrations page in order to configure and enable the integration. *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*
  - **LATER** - Select this option to return to the Marketplace page without configuring the integration. *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- **NOT NOW** - Select this option to cancel the purchase and return to the Marketplace page. *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- **BACK** - Select this option to return to the previous page of the Purchase process.


Twitter
Billing
Enter billing address
Company
Enter headquarters address
Confirm
Review and confirm Order
Please enter your company billing address.
Billing Contact First Name *
Billing Contact First Name
Billing Contact Last Name *
Billing Contact Last Name
Company Billing Address *
Company Billing Address
Unit Number
City *
City
State/Province *
State/Province
Zip/Postal Code *
Zip/Postal Code
Country *
Country
Email *
Email
Phone *
Phone
Cancel
Next


Twitter integration has been installed
Integrations must be configured before they can be enabled. Would you like to configure now?
Later
Configure Now

Edge Integration - Contact Us

The Marketplace service enables administrators to conveniently browse and discover all available third-party integrations and purchase or try the desired integrations.

When accessing Marketplace from any production or non-production environment, administrators have the option to contact their Client Executive to learn more about a Packaged (non-Edge Ready) integration. This enables the Client Executive to discuss the integration with the administrator and assist them in configuring and enabling the integration via backend settings.

To contact Cornerstone regarding a Packaged integration, go to ADMIN > TOOLS > EDGE > MARKETPLACE. From the Marketplace page, select the appropriate Edge integration. Then, from the Integration Details page, select the **CONTACT US** button. This button is only available when viewing a Packaged integration.

When using any of the Edge services, such as Marketplace or Integrations, administrators can navigate between the services by clicking the Menu icon in the upper-right corner of the page and selecting the desired service:

- Marketplace - *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- Integrations - *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

There are two types of integrations that are available for the Cornerstone system, Edge Ready and Packaged.

- Edge Ready integrations can be purchased, installed, and configured by administrators within Edge Integrate. On the Marketplace page, integrations that are Edge Ready have the Edge icon displayed next to their name.
- Packaged integrations must be purchased, installed, and configured through the previously existing channels, such as Client Executives and Global Product Support (GPS).

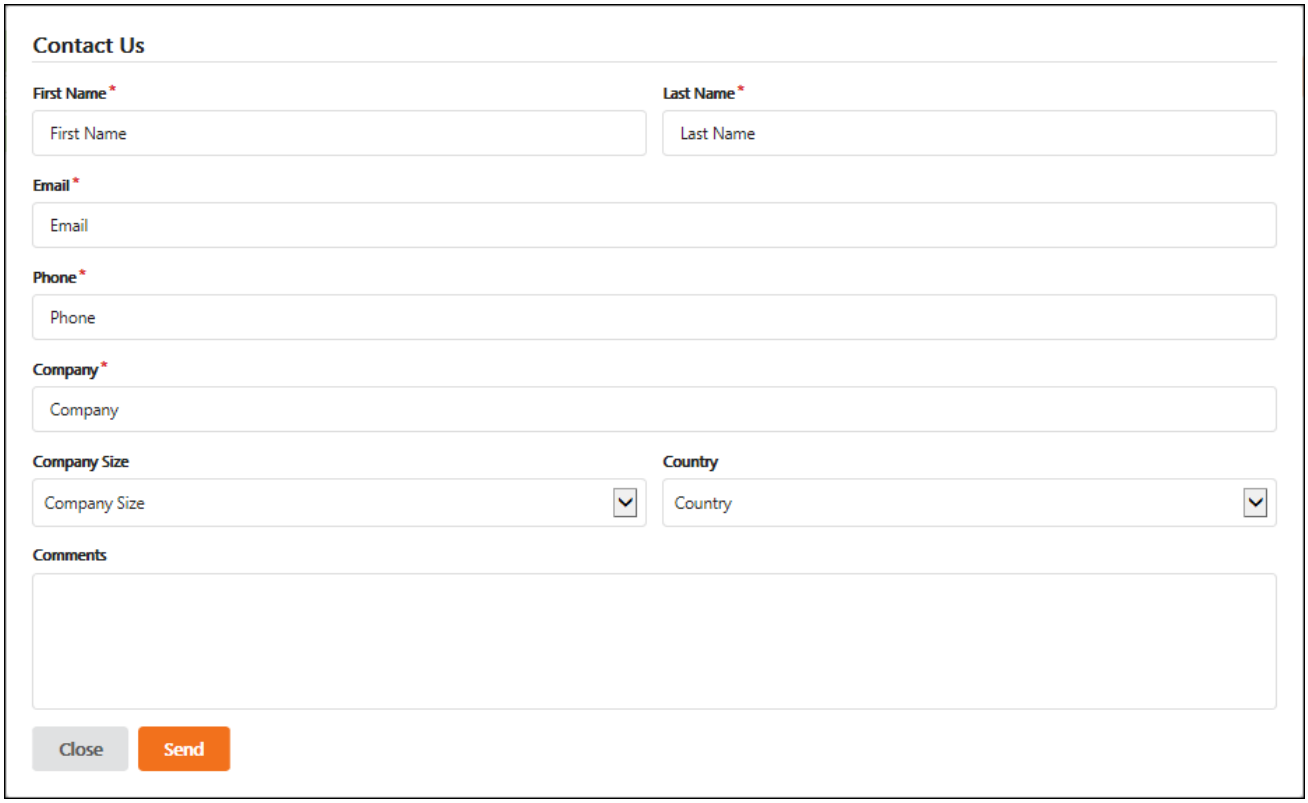
Contact Information

When the **CONTACT US** button is selected, the Contact Us pop-up opens. In the pop-up, provide your contact information and enter any necessary comments that will be sent to the organization's Client Executive.

Try it Free/Not Now

Select the **SEND** button to send the contact information to the organization's Client Executive. The Client Executive will assist in purchasing, configuring, and enabling the Packaged integration.

Select the **CLOSE** button to close the pop-up without contacting the Client Executive.



Integrations

Integrations - Configure My Edge Integrations

Once an integration is purchased or a trial is initiated for the integration, the Integrations service enables administrators to configure, enable, and disable their third-party integrations. This greatly simplifies the implementation process by reducing implementation times and enabling administrators to enable and configure the integrations.

To configure and enable the Edge integrations that have been purchased for your portal, go to ADMIN > TOOLS > EDGE > INTEGRATIONS. The Integrations page opens in a new browser tab.

When using any of the Edge services, such as Marketplace or Integrations, administrators can navigate between the services by clicking the Menu icon ☰ in the upper-right corner of the page and selecting the desired service:

- Marketplace - *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- Integrations - *See* **Integrations** on page 237 *for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

Available Integrations

The Integrations page displays all of the integrations that have been purchased or are within a trial period.

To the right of the My Integrations tab, the portal type is displayed. The portal type determines which integrations are available:

- Production Environment - When accessing Integrations from a Production portal, administrators can configure and enable Edge integrations that have been purchased from the Marketplace.
- Non-production Environment - When accessing Integrations from a non-production environment, such as a Pilot or Stage portal, administrators can configure and enable Edge integrations that have been purchased or are within a trial period. Once the trial period has expired, the integration is no longer available to be configured until it is purchased.

Prior to configuring an integration, the integration must be purchased or a trial period must be initiated for the integration. This is done from the Marketplace. *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*

Configure

If an Edge integration has configuration settings, then the integration cannot be enabled until it is configured. In addition, the option to enable or disable the configuration is only available after the integration is configured.

To configure an integration, select the **CONFIGURE** button. *See* **Edge Integration - Configure** on page 241 *for additional information.*

Edit Configuration

After an integration is configured, the **CONFIGURE** button is hidden and an Enable/Disable toggle switch is available.

To edit the configuration settings for an integration that has already been configured, select the integration title. This opens the Configuration page. *See* **Edge Integration - Configure** on page 241 *for additional information.*

Enable or Disable

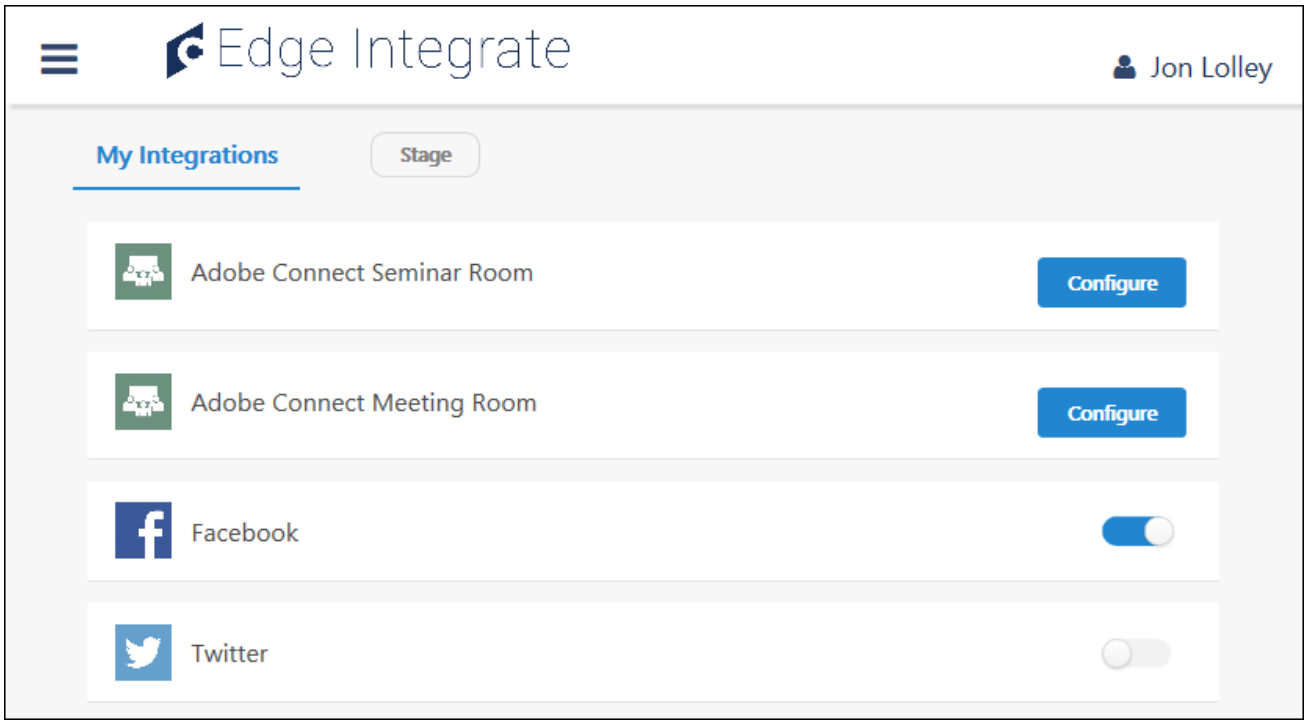
An Edge integration can be enabled or disabled from the Integrations page in the following scenarios:

- The integration has already been configured. After an integration is configured, the **CONFIGURE** button is hidden and an Enable/Disable toggle switch is available.
- The integration does not have configuration settings.

If an integration has configuration settings, then the Enable/Disable toggle switch is not available until the integration is configured.

To enable or disable an integration for the current portal, select the toggle switch to the right of the integration. ***Note:*** *Enabling or disabling an integration only impacts the current portal. If the integration should be enabled or disabled in all portals, than this must be done separately within each portal. The current portal type is displayed at the top of the page.*

- Enabled  - The integration is enabled when the slider is positioned on the right side of the toggle switch.
- Disabled - The integration is disabled when the slider is positioned on the left side of the toggle switch.


Edge Integrate
Jon Lolley
My Integrations
Stage
Adobe Connect Seminar Room
Configure
Adobe Connect Meeting Room
Configure
Facebook
Twitter

Edge Integration - Configure

Once an integration is purchased or a trial is initiated for the integration, the Integrations service enables administrators to configure, enable, and disable their third-party integrations. This greatly simplifies the implementation process by reducing implementation times and enabling administrators to enable and configure the integrations.

To configure an Edge integration, go to ADMIN > TOOLS > EDGE > INTEGRATIONS. Then from the Integrations page, select the **CONFIGURE** button to the right of the appropriate Edge integration.

When using any of the Edge services, such as Marketplace or Integrations, administrators can navigate between the services by clicking the Menu icon ☰ in the upper-right corner of the page and selecting the desired service:

- Marketplace - *See* **Marketplace - Browse Edge Integrations** on page 221 *for additional information.*
- Integrations - *See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

Copy Settings from Another Portal

If the integration you are configuring has been configured in another environment, then administrators can copy the configuration settings from the configured environment.

- Use Case: An administrator enables a 30-day trial in their Pilot portal and configures the integration in the Pilot portal. The administrator later decided to purchase the integration and begins to configure the integration in the Production portal. The administrator copies the integration's configuration settings from the Pilot environment to the environment they are currently configuring.

To copy the integration's configuration settings from another environment, select the **Copy from** drop-down menu and select the appropriate environment. After copying the settings, administrators may modify the settings prior to saving them. The **Copy from** drop-down menu only displays environments in which the selected integration has been configured.

Important: *Copying settings from another environment will overwrite any settings that may have been configured for the integration in the current environment.*

Setup Instructions

The *Setup Instruction* section contains detailed information regarding how to configure the integration.

To view the setup instructions, click the **Setup Instructions** link. The section expands to display the instructions.

Configuration Settings

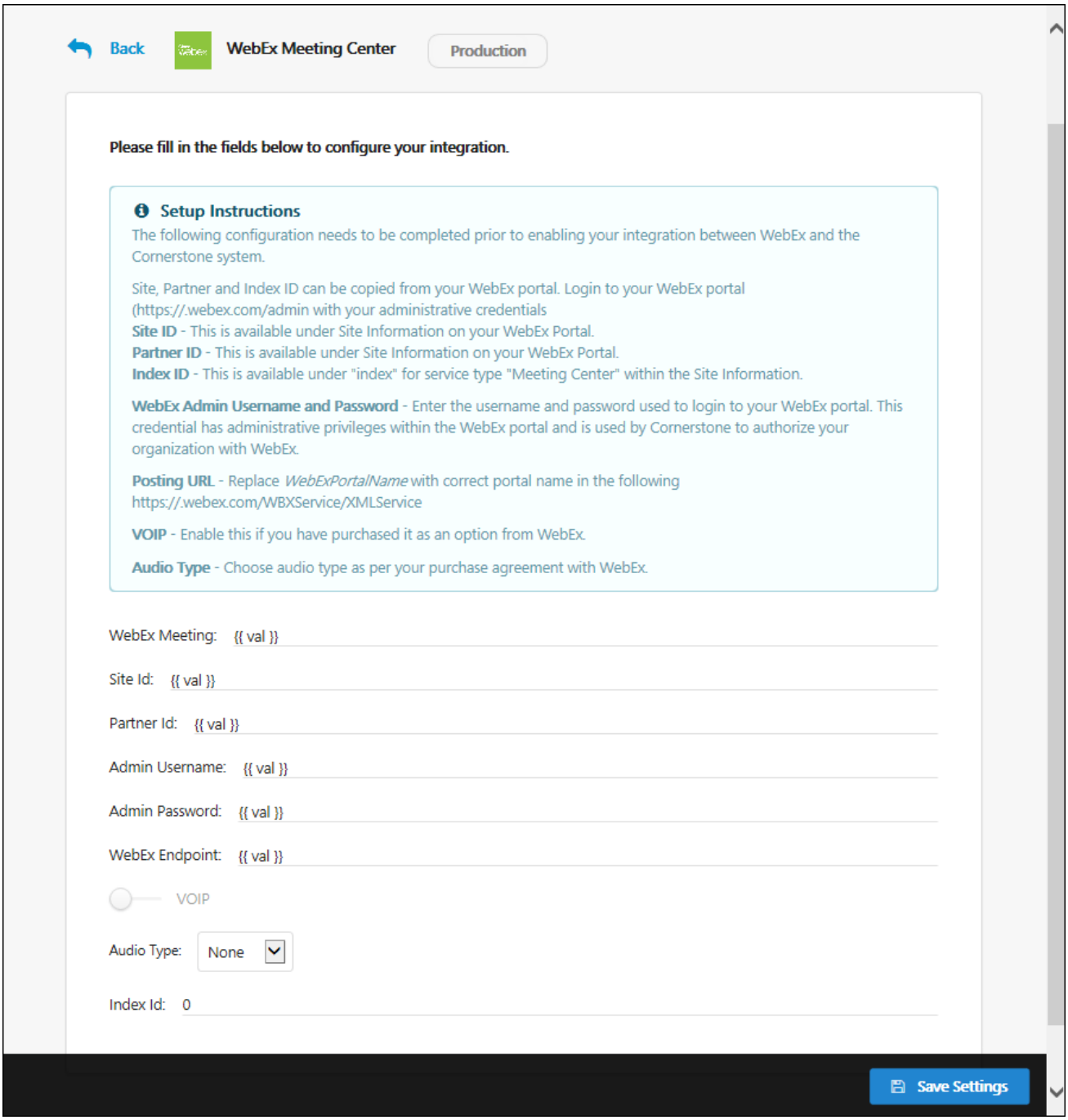
Complete all of the fields to configure the integration. For information on the configuration fields, click the **Setup Instructions** link.

Important: *The configuration settings only apply to the current portal. If the integration is used in multiple portals, then the integration must be configured and enabled in each portal. The current portal type is displayed at the top of the page.*

Save Settings

After completing the configuration fields or copying the configuration settings from another environment, click the **SAVE SETTINGS** button at the bottom of the page to save any changes to the settings.

Important: *After saving the configuration settings, the integration must be enabled on the Integrations page before the functionality is available in the portal. See* **Integrations - Configure My Edge Integrations** on page 237 *for additional information.*


Back
WebEx Meeting Center
Production
Please fill in the fields below to configure your integration.
Setup Instructions
The following configuration needs to be completed prior to enabling your integration between WebEx and the Cornerstone system.
Site, Partner and Index ID can be copied from your WebEx portal. Login to your WebEx portal (https://.webex.com/admin with your administrative credentials
Site ID - This is available under Site Information on your WebEx Portal.
Partner ID - This is available under Site Information on your WebEx Portal.
Index ID - This is available under "index" for service type "Meeting Center" within the Site Information.
WebEx Admin Username and Password - Enter the username and password used to login to your WebEx portal. This credential has administrative privileges within the WebEx portal and is used by Cornerstone to authorize your organization with WebEx.
Posting URL - Replace WebExPortalName with correct portal name in the following https://.webex.com/WBXService/XMLService
VOIP - Enable this if you have purchased it as an option from WebEx.
Audio Type - Choose audio type as per your purchase agreement with WebEx.
WebEx Meeting: {{ val }}
Site Id: {{ val }}
Partner Id: {{ val }}
Admin Username: {{ val }}
Admin Password: {{ val }}
WebEx Endpoint: {{ val }}
VOIP
Audio Type: None
Index Id: 0
Save Settings

Edge Ready Integrations

Adobe Connect Meeting Room Integration

The Adobe Connect Meeting Room integration allows for seamless creation of virtual meetings that can host up to 100 meeting participants. The integration gives users the ability ot execute on all phases of the meeting setup and execution from within Cornerstone's Learning Management System (LMS). This vILT integration allows Learning Administrators to add instructors, create and manage sessions, and track attendance from within Cornerstone. Adobe Connect sessions can be launched from Cornerstone directly into Adobe Connect.

When an instructor is selected for an Adobe Connect vILT session, the instructor is automatically designated as a host for the Adobe Connect session.

Use Case

1. An administrator working inside the LMS is setting up webinar training that will be attended by the entire company. She creates the session inside the LMS and assigns an instructor. The assigned instructor is automatically designated as a host for the session.
2. Because there will be less than 100 attendees, she decides to use one of her company's licensed Meeting Rooms with Adobe Connect.
3. One of the facilities inside of the LMS is mapped to the appropriate Meeting Room in Adobe Connect. The administrator makes sure that the location of the session is using a location with that facility so that the meeting will be held inside the Meeting Room.
4. The webinar is assigned to the entire company and when it comes time for the session to start, the attendees launch the webinar directly from their transcripts and are taken directly into the Meeting Room inside of Adobe Connect.

Implementation

The Adobe Connect Meeting Room integration requires Cornerstone Learning and an Adobe Connect Meeting Room account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Adobe Connect Seminar Room

Adobe Connect Seminar Room

The Adobe Connect Seminar Room integration allows for seamless creation of virtual meetings from within Cornerstone Learning using the Adobe Connect API. This vILT integration allows Learning Administrators to add instructors, and create and manage sessions from within Cornerstone. Adobe Connect sessions can be launched from Cornerstone directly into Adobe Connect.

When an instructor is selected for an Adobe Connect vILT session, the instructor is automatically designated as a host for the Adobe Connect session.

Use Case

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

Considerations

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

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

Implementation

The Adobe Connect Seminar Room integration requires Cornerstone Learning and an Adobe Connect Seminar Room account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Move Session to Adobe Connect Seminar Room

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

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

Create Seminar Room Facility

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

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

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

Create Session with Seminar Room Facility

To create an ILT Event Session, go to **ILT > Manage Events & Sessions**. Search for the appropriate event and in the Options column next to the event, click the View Sessions icon . To create a new session, you can do so via one of the following options:

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

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

- **Name** - Enter the session name.
- **Description** - Enter the session description.
- **Location** - Select the Seminar Room Facility.

Broadbean External Sourcing

Broadbean External Sourcing Overview

The Broadbean External Sourcing integration enables organizations to source applicants from external job boards in Broadbean. The applicants can be added to talent pools and invited to apply to the job.

Use Cases

- **Sourcing Candidates** - Lauren the Recruiter needs to find more candidates to apply for the requisitions she is responsible for. She wants to source candidates from different job board platforms.
- **Adding to Talent Pools and Inviting to Apply** - Once Lauren performs searches and finds candidates that could potentially fit the open positions, she wants to add those candidates to talent pools and/or invite them to apply to the requisitions.

Implementation

The Broadbean External Sourcing integration requires Cornerstone Learning and a Broadbean account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Glossary

- External Sourcing - Sourcing applicants from external job boards.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
External Search: Manage	Grants access to view and manage the external sourcing functionality. This permission cannot be constrained.	Recruiting

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration -	Grants ability to manage email trigger templates across all active modules in the portal. Enables	Core Administration

Manage	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.	
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
Recruiting: Search Candidates	Grants ability to access Candidate Search page for recruiting, which enables searching for internal candidates and external candidates who have applied for open positions. This permission also enables the Invite to Apply action item to appear in the Actions drop-down on the Search Candidates - Search Results page. This permission can be constrained by OU and User's OU.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the*	Recruiting

	Requisition: Manage *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. ***Note:*** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* ***Note:*** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* ***Requisition: Reviewer*** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* ***Requisition: Reviewer*** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting
Requisition 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

Roles

The following permission is added to the Recruiting - Manager role:

- External Search: Manage

Requisition Templates - Keywords

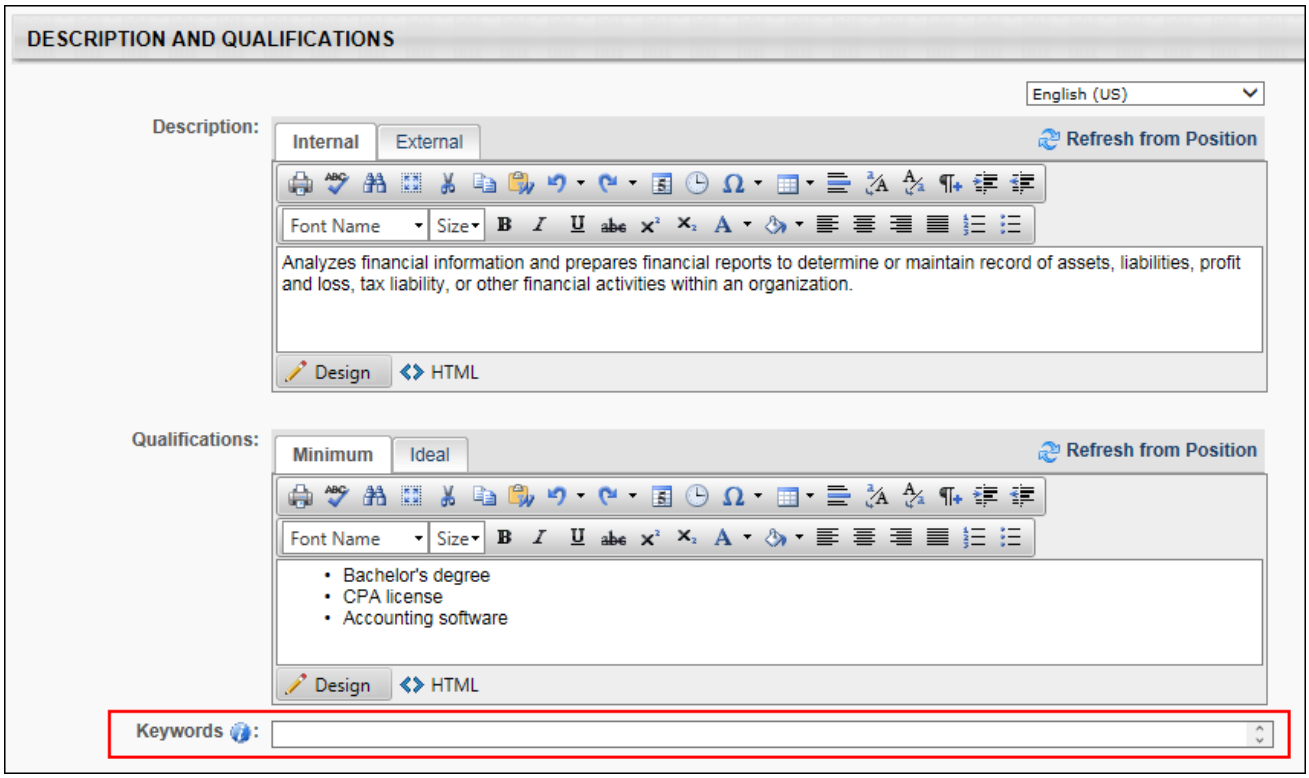
With this enhancement, a **Keywords** field is added to the Description and Qualifications section for requisition templates. The keywords that are added to the field are used when the recruiter is accessing Broadbean from the Manage Requisitions page.

Note: *The* **External Sourcing** *option allows recruiters to search for applicants from external job boards in Broadbean. The* **External Sourcing** *option can be accessed from the* ***Manage Job Requisitions*** *page and the* ***Candidate Search Query*** *page.*

To create requisition templates, go to **Admin > Tools > Recruit > Requisition Templates**. In the Options column to the right of the appropriate Position organizational unit (OU), click the Manage Requisition Template icon .

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units and custom groups. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration



Keywords

Enter keywords into the **Keywords** field, up to 1000 characters. Separate each keyword by a comma, and then a space.

The keywords can be localized by selecting the desired language from the language drop-down in the upper-right corner of the Description and Qualifications section. Then, enter the translated keywords in the **Keywords** field.

Create Job Requisition - Keywords

With this enhancement, a **Keywords** field is added to the Description and Qualifications section for requisition templates. The keywords that are added to the field are used when the recruiter is accessing Broadbean from the Manage Requisitions page.

to automatically populate the search criteria when searching for applicants through the **External Sourcing** option.

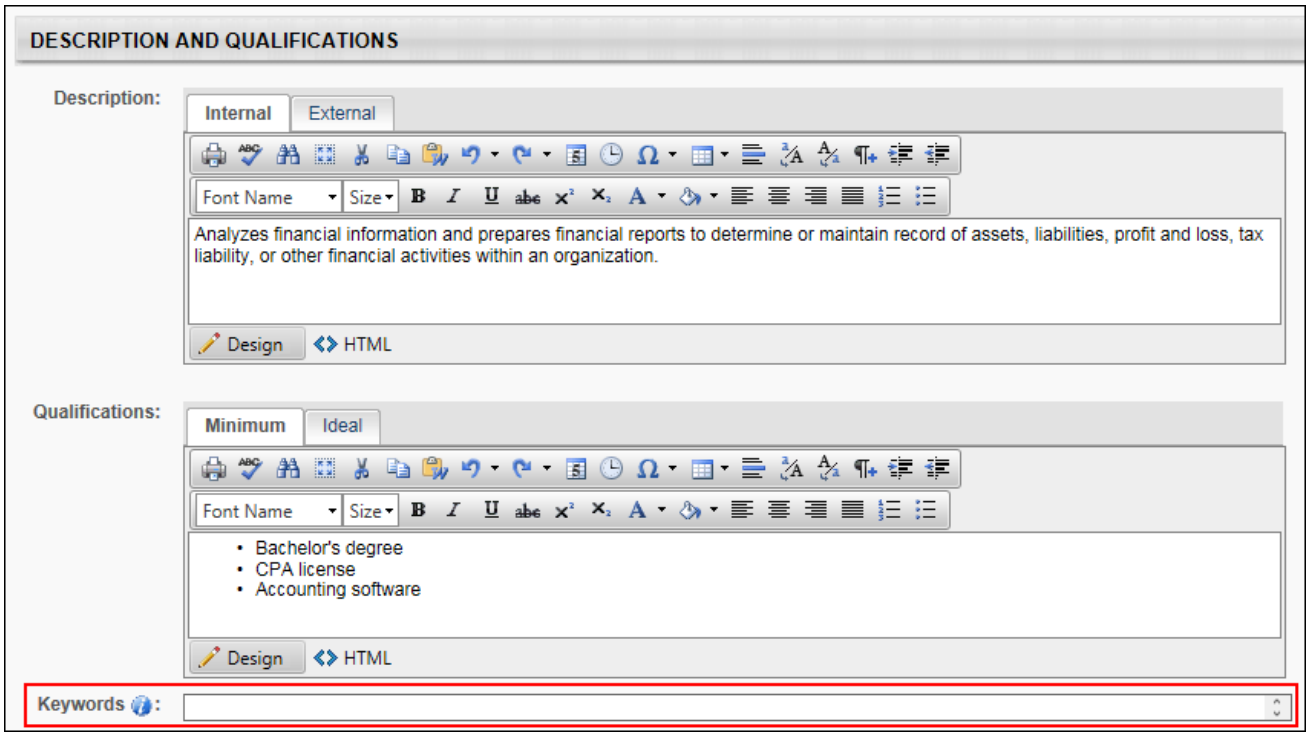
Note: *The* **External Sourcing** *option allows recruiters to search for applicants from external job boards in Broadbean. The* **External Sourcing** *option can be accessed from the* ***Manage Job Requisitions*** *page and the* ***Candidate Search Query*** *page.*

To create job requisitions, go to **Recruit > Manage Requisition**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Description	Grants ability to edit the internal and external descriptions for requisitions. This permission cannot be constrained. This permission must be used in conjunction with the **Requisition: Manage** permission. ***Note:*** *For requisition owners and managers who do not have this permission, when editing a job requisition, the requisition description section is read-only.*	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission*	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



Keywords

Enter keywords into the **Keywords** field, up to 1000 characters. Separate each keyword by a comma, and then a space.

The keywords can be localized by selecting the desired language from the **View In** drop-down. Then, enter the translated keywords in the **Keywords** field.

Manage Job Requisitions - External Sourcing Option

An **External Sourcing** option is added to the options drop-down on the Manage Job Requisitions page. This option allows recruiters to open the Broadbean search page and search for applicants to add to a talent pool or invite to apply to the job.

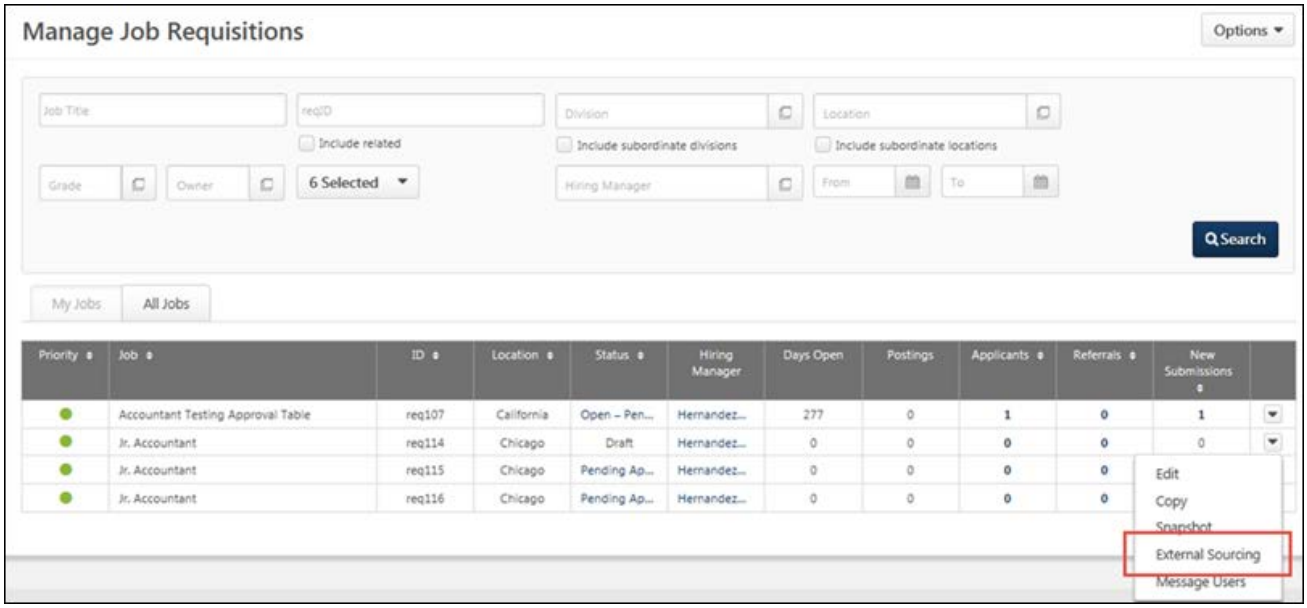
Error Note: *If your Broadbean account is not active, a message displays directing you to My Account > My Social Profiles in order to activate your Broadbean account.*

To manage job requisitions, go to **Recruit > Manage Requisition**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a	Recruiting

	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.*	



Candidate Search Query - External Sourcing Option

An **External Sourcing** option is added to the upper-right corner of the Candidate Search Query page. This applies to the Quick Search and Advanced Search tabs. This option allows recruiters to open the Broadbean search page and search for applicants to add to a talent pool or invite to apply to the job.

In addition, when searching for candidates, the system will also use the resume submitted by external candidates as part of the search.

To access the Candidate Search Query, go to **Recruit > Candidate Search Query**.

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
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

Job Boards - Search for Applicants

Recruiters can search for applicants on external job boards in Broadbean. See the following for the steps necessary to search for applicants via Broadbean:

STEP	GO TO	STEP DESCRIPTION
1	Manage Job Requisitions > Create Job Requisition	Enter keywords in the **Keywords** field. The keywords are **USED** to automatically populate the search criteria in Broadbean.
2	Recruit > Manage Job Requisitions or Recruit > Candidate Search Query	Click the **External Sources** option in the options drop-down. This opens the Broadbean search page.
3	Broadbean Search Page	Select the job boards from which to search for applicants. The keywords and job title from the job requisition will be pre-populated so that you do not need to enter search criteria.
4	Broadbean Search Page	Search for applicants from the Broadbean search page.
5	Broadbean Search Results Page	Click the **Add to Talent Pool** option to add the desired applicants to the talent pool. The talent pools that display in Broadbean for recruiters are the talent pools to which they have access to view and edit in the portal. ***Note:*** *If an applicant currently has an Applicant Profile page in the portal, then the applicant is automatically added to the talent pool.* ***Note:*** *External applicants can still create a profile on the career site if the talent pool to which they are added is deleted before the applicant creates their profile.*

Broadbean Account Requirements

You must have an account with Broadbean in order to use the External Sourcing feature.

Email Administration

With this enhancement, a Create Profile Invitation email is added to the Recruitment action type in Email Administration:

Permissions

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

Create Profile Invitation

ACTION	DESCRIPTION / TRIGGER
Create Profile Invitation	This email is triggered when an external applicant is added to a talent pool via Broadbean. The email should include the INVITATION.TO.CREATE.PROFILE tag so that applicants can click the link to create a profile. The email should also include the DELETE. CANDIDATE.INFORMATION tag so that applicants can delete their temporarily stored data from the database. The email can be sent to external candidates that were added to the talent pool and have created a profile with a valid email address. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Administration. Use Case: This trigger invites an external applicant to create a profile on the career site. The email is triggered when the applicant is added to a talent pool via Broadbean. ***Note:*** *This email is not sent to applicants who currently have a*

ACTION	DESCRIPTION / TRIGGER
	*user record in the portal. However, the email **is** sent to applicants who are added to a talent pool for a different requisition but have already created a profile on the career site. In such cases the applicant will be directed to a page that indicates an account (which is created using the applicant's email address) currently exists for the applicant.*

Email Tags

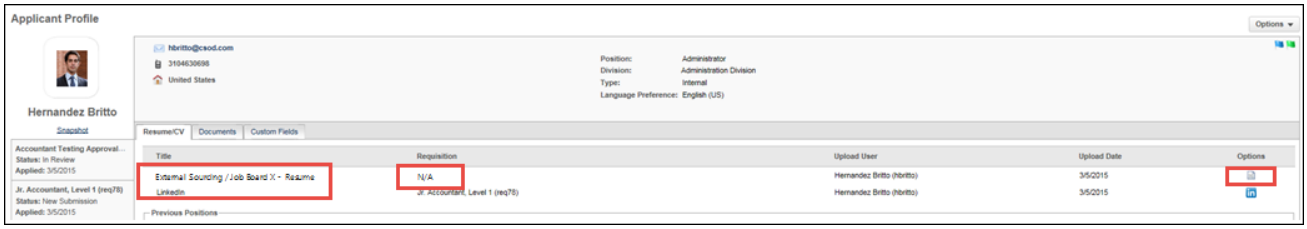
The following email tags are available for the Create Profile Invitation email (new tags appear in red):

TAG NAME	DESCRIPTION
ACTION.DATE	Date that the action took place that triggers the email.
INVITATION.TO.CREATE.PROFILE	Link to the default career site.
DELETE.CANDIDATE.INFORMATION	Link to delete temporary profile data. Applicant can click the link and choose to remove their temporary profile data from the organization. When the user clicks **YES** to delete, a confirmation appears. Click **YES** to confirm the deletion, or click **NO** to cancel the deletion. If you click **YES**, the candidate is directed to the job search page of the career site.
COMPANY.NAME	Name of the company that sent the email. (This is your company's name.)
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.

Applicant Profile - Snapshot

When external applicants create a profile on the career site from the email invitation, their resume is saved on the Applicant Profile > Snapshot page.

With this enhancement, when a resume is sourced from Broadbean, the Title column displays as "External Sourcing/[Job Board Name - Resume." The Requisition column displays as "N/A."



Career Site Profiles

Contact Information and Resume

When applicants are invited to create a career site profile as a result of the **ADD TO TALENT POOL** action on Broadbean, the applicant's contact information is automatically entered on the career site. This saves the applicant from having to re-enter this information when creating a career site profile.

Creating a Profile

Applicants can create a profile using their email address. This reduces the possibility of duplicate applicants.

Note: *Applicants are required to create a profile if enabled by a backend setting. If the backend setting is disabled, then applicants are added to the talent pool without needing to create a profile on the career site.*

Delete Temporary Profile

When applicants are invited to create a career site profile as a result of the **ADD TO TALENT POOL** action on Broadbean, the applicant can choose not to create the profile and instead to delete their information from the organization's database.

In the Create Profile Invitation email, if the DELETE.CANDIDATE.INFORMATION tag is included by the administrator in the email, the tag displays as a link in the email. Applicants can click the link and choose to remove their temporary profile data from the organization. This opens a page where the applicant can click **YES** to delete or **CANCEL** to keep their information stored on the database. If they click **YES**, they are directed to the job search page of the career site.

Auto-Deletion of Temporary Profile

The external applicant's resume and data will be deleted from the Applicant Profile > Snapshot page after the set number of days, as defined by the administrator via a backend setting.

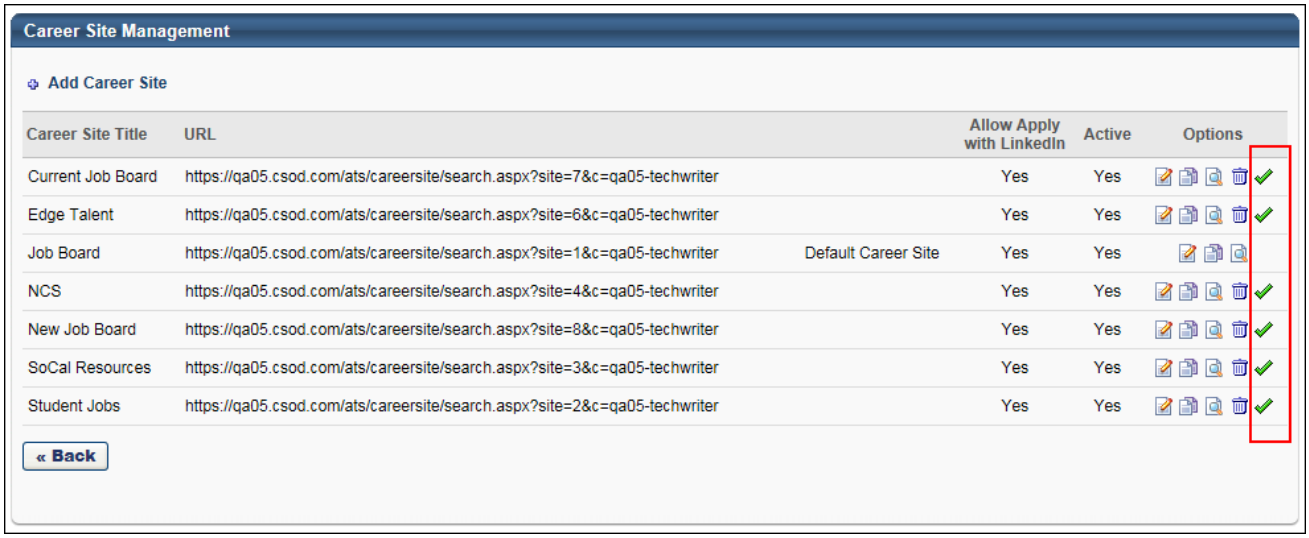
Career Site Management

With this enhancement, a Set as Default option is added to the Career Site Management page. This option allows administrators to select which career site they would like to be the default career site.

To manage career site pages, go to **Admin > Tools > Recruit >Career Sites**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration



Set as Default

The Set as Default icon ✔ displays as the far right option in the Options column. Click the icon to set the selected career site as the default site. This opens a confirmation pop-up. Click **YES** to set the career site as the default, or click **NO** to cancel the action.

The default career site is linked to from the DEFAULT.CAREER.SITE email tag.

Deactivate Default Career Site

When a career site is defined as the default site, it cannot be deactivated. Only career sites that are not the default can be deactivated.

Inactive Career Sites

Careers sites that are inactive cannot be defined as the default.

Auto-Designation as Default Career Site

For career sites created after implementation of this enhancement, if the career site created is the first career site created for the portal in Career Site Management and the career site is defined as active, then that career site is automatically the default career site.

For current and future career sites, if the portal has no career sites defined as active, then the first career site created that is defined as active will be the default career site.

CIC Plus Integration

Through integration with CIC Plus, employers can assign electronic tax withholding forms (W-4 forms) to new hires as part of the Onboarding workflow. New hires can then complete all applicable ho can then electronically complete tax withholding paperwork as part of their onboarding process. Employers are able to track tax withholding form completion, along with other onboarding tasks. This integration provides users access to the forms through a secure, self-service site.

Considerations

A future enhancement to the integration features may include the ability for employees to update existing W-4 forms.

Implementation & Configuration

The CID Plus integration requires Cornerstone Onboarding and a CIC Plus account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

When configuring the integration, the following applies:

- Provide User Refs as unique identifier for users. This helps to ensure that data syncs across Cornerstone, CIC Plus, and their other systems. If this information is not provided, then internal user IDs will be used.
- The target Location OUs for onboarding users must have complete address data, which includes a street address, city, state, ZIP code, and country.
- A parent form task that is assigned to the onboarding employee for the purpose of collecting the employee’s home address information must be configured prior to adding an integration task for completing W-4 forms.
- The W-4 Form (CIC Plus) integration task must be added to Onboarding Workflows as a child task of parent form tasks.
- A setting to collect the user's social security number and date of birth must be configured in CIC Plus.

Use Case

1. Prior to issuing a new employee's first paycheck, an employer needs to know how much they need to withhold from an employee's paycheck for taxes. A task to complete the necessary W-4 form(s) needs to be assigned to new hires as an onboarding task.
2. Amanda, an administrator, is configuring onboarding workflow tasks for new hire onboarding. She needs to add an integration task for W-4 forms to the onboarding tasks for the new hire. However, as a prerequisite to completing W-4 forms, Amanda needs to ensure that the employer has the most recent address information for the new hire. Amanda configures a form task as a parent task and assigns it to onboarding employees to collect their home address information. She then configures a form task as a child task and assigns it to Mark, a Human Resources (HR) representative, to collect the new hire's work location address. Finally as a child task to the two form

tasks, Amanda configures an integration task for W-4 forms though integration partner CIC Plus to be assigned to onboarding employees.

3. Vincent has just been hired and has started the onboarding process. He launches and completes a form task and fills out his home address.
4. Mark launches and completes a form task to fill out Vincent's work address.
5. Vincent is assigned an integration task to complete his W-4 forms. He clicks on his action item in Universal Profile to complete his W-4 forms. Through Single Sign-On (SSO), he is automatically signed into Paperless Employee, a CIC Plus Product, where he sees the W-4 forms he needs to complete. If Vincent still has more forms to complete after he submits a form, he receives a notification telling him how many pending forms he still has to complete. He can access and complete those forms through his original W-4 form action item. After Vincent completes all his pending forms, his W-4 form action items is automatically completed and removed from his list of action items.
6. Esther, the HR Director, monitors the progress of onboarding employees. As new hires and HR representatives complete their respective tasks, she can see the completion progress for the new hire when it is updated. In the result column of the W-4 task, Esther can see how many W-4 forms are still pending for the new hire if they have not yet completed all the W-4 forms required for them.

Security

The following permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by Employee Relationship, OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile
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
Action Items - Employee Onboarding	Grants ability to view Onboarding actions via the Universal Profile - Actions page or the Welcome/Custom page Actions widget. This permission cannot be constrained. This is an end user permission.	Universal Profile

Onboarding - Manage	Grants ability to manage user onboarding in the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
Onboarding - View	Grants ability to view the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
Onboarding Workflows - Manage	Grants ability to access and manage Onboarding Workflows. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration
Onboarding Integrations - Manage	Grants administrator ability to manage Recruiting and Onboarding Integrations. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration
Recruiting Integrations - Manage	Grants ability to access and manage the Recruiting Integrations Preferences page. This is an administrator permission. This permission cannot be constrained.	Recruiting Administration

Facebook

Facebook Integration Overview

The integration between Cornerstone and Facebook allows users to share posts directly from their Cornerstone Connect Live Feed to Facebook. This is useful for users who wish to share interesting company updates with family and friends.

Use Cases

Troy is a Marketing Coordinator for a package delivery service at their office in New York. He sees a post on his Live Feed from a colleague stating "The Brooklyn Bridge has been completely shut down. Plan your commute accordingly!" Knowing that the delivery trucks use Facebook to broadcast traffic conditions, Troy re-posts this to Facebook so that the delivery drivers can complete their routes on time.

Considerations

Only updates that the user manually posts to the Connect Live Feed can be shared to Facebook.

Only text from user updates is shared to Facebook. Links and files are not shared.

Implementation

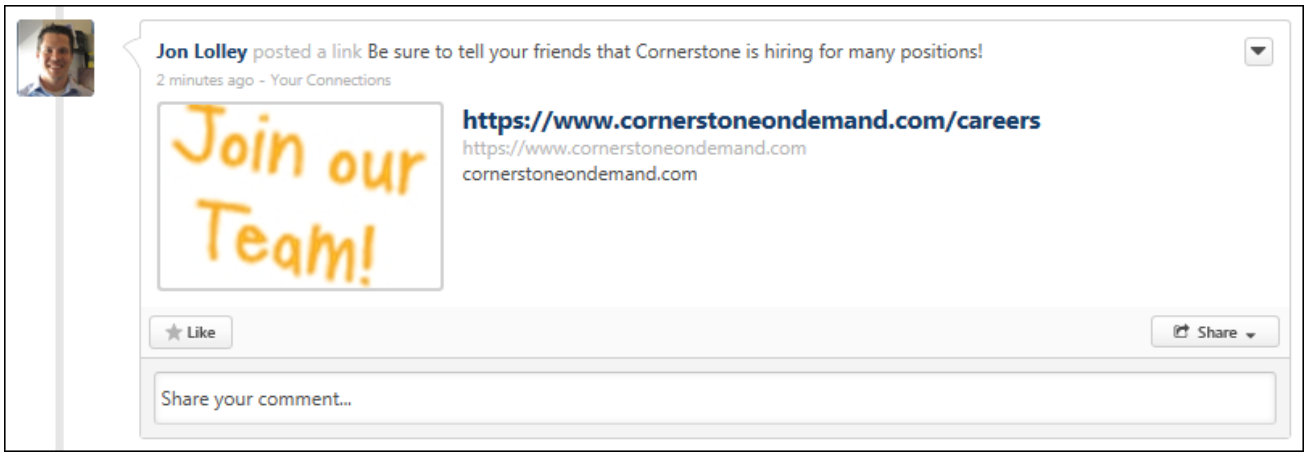
The Facebook integration requires New Connect. Also, users must have a Facebook account to utilize this integration.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is enabled via Edge Integrations.

Share Live Feed Posting to Facebook

When the Facebook integration is enabled, users who have a Facebook account can share any updates that any user in their feed has manually posted to the Connect Live Feed to their Facebook feed.

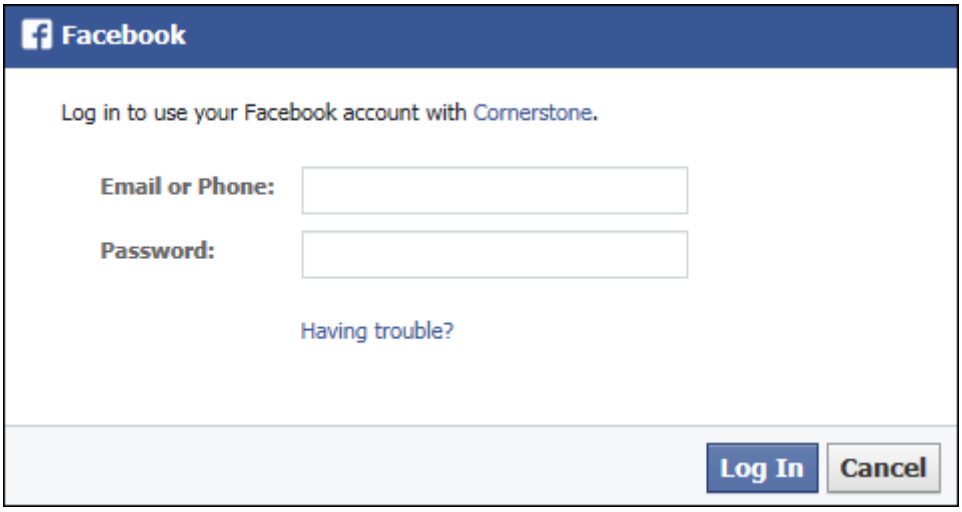
To share an update from the Connect Live Feed to Facebook, click the **SHARE** button in the lower-right corner of the update. Then, select **Facebook**. If you are logged in to Facebook and have authorized Cornerstone to post to Facebook, then the selected update is posted to your Facebook page.



Log in to Facebook

When you attempt to share a posting to Facebook, the system checks your Internet browser's cookies to see if you are currently logged in to Facebook. If you are not currently logged in to Facebook, you are prompted to enter your Facebook credentials and log in.

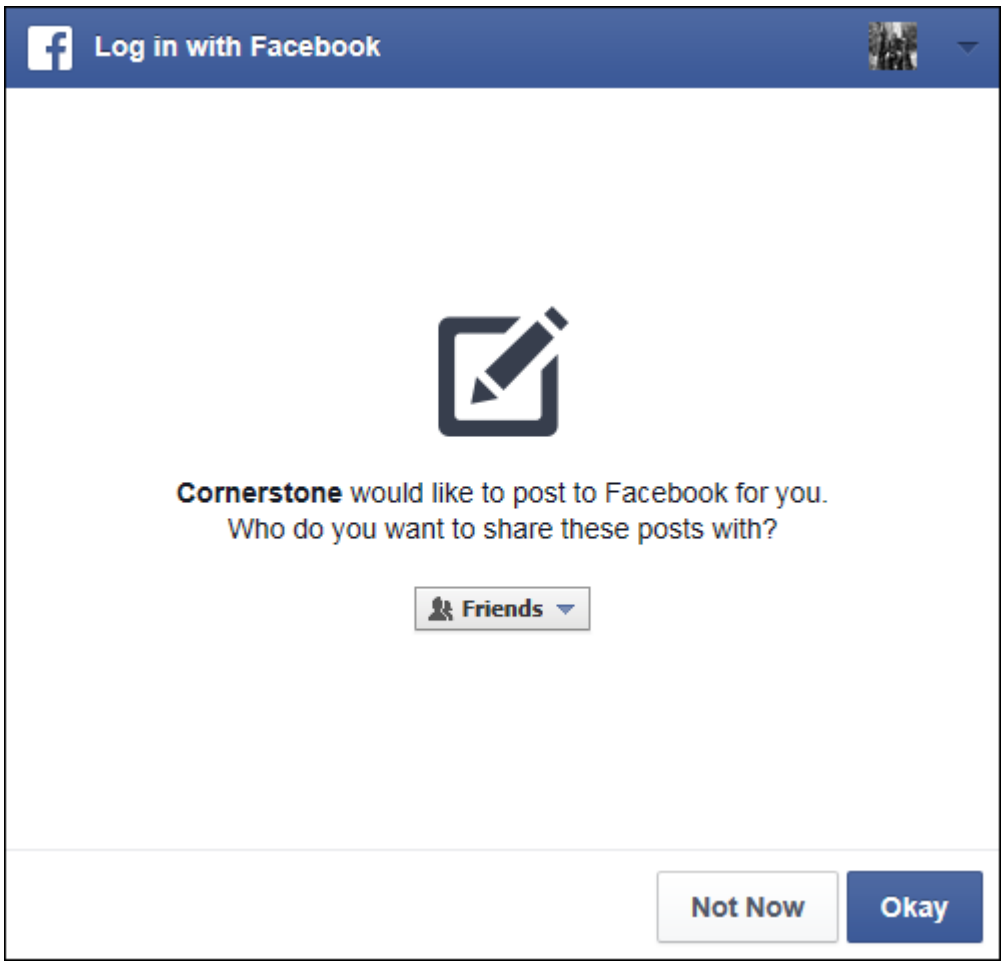
Enter your Facebook credentials, and select **LOG IN**.



Authorize Cornerstone to Post to Facebook

When you attempt to share a posting to Facebook, Facebook checks to see if you have authorized Cornerstone to post to Facebook. If you have not already authorized Cornerstone to post to Facebook, you are prompted for the authorization.

From the drop-down, select the users with whom you will share posts from Cornerstone. Then, select **OKAY**.



First Advantage Integration

The First Advantage Background Checks and Drug Screening integration allows recruiters to easily submit background checks and drug screenings for job applicants from with Cornerstone Recruiting.

Implementation

The First Advantage integration requires Cornerstone Recruiting and a First Advantage account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

GoToMeeting Integration

The GoToMeeting integration allows Cornerstone's Learning administrators add instructors, create and manage sessions, and track attendance from within Cornerstone. Citrix GoToMeeting sessions can be launched from Cornerstone directly into GoToMeeting.

Implementation

The GoToMeeting integration requires Cornerstone Learning and an GoToMeeting account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Multiposting Job Posting

Multiposting Integration Overview

The Multiposting integration enables recruiters to post a requisition that has multiple language translations to multiple job boards that support multiple languages. Through an integration with Multiposting, recruiters can select the desired job boards from the External Postings page of the job requisition and post the job to more than one job board that supports multiple languages.

Recruiters will be able to see the latest statistics for each job board, as well as take actions such as edit the job posting, delete the job posting, and repost the job when the job posting expires.

Use Case

1. Peter is a Recruiter at a global organization and needs to recruit Sales Representatives in Mexico so that the company can expand in Mexico.
2. Peter has created a Sales Representative requisition that has already been translated into Spanish.
3. Peter needs to post this job to as many job boards as possible so that he can get maximum exposure to get the best Spanish-speaking sales representatives in Mexico.
4. Peter posts the job to five well-known Mexican job boards, making sure that the postings are available in English and Spanish.
5. Peter can see the status of his job postings on each of the job boards.
6. Peter can take actions like editing, deleting, or reposting the job depending on how the job posting does on each of the job boards.

Implementation

The Multiposting Job Posting integration requires Cornerstone Learning and a Multiposting account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing	Recruiting

	information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	
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

External Postings Page - Updates to Job Boards Section

With this enhancement, a **Job Board Vendor** drop-down is added to the Job Boards section on the External Postings page to enable recruiters to select the job board vendor, such as Multiposting.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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.	

Job Board Vendor Drop-Down

The **Job Board Vendor** drop-down displays the active job board integrations that are available to post the requisition. To select a vendor, click the drop-down and select the vendor from the list.

Once the vendor is selected, the options in the Job Boards section and the columns in the job boards table will change based on the vendor selected.

Note: *The* **Job Board Vendor** *drop-down only displays if there is at least one active job board integration, as configured.*

Multiposting Job Board Postings

The Multiposting integration allows recruiters to post a requisition that has multiple language translations to multiple job boards that support multiple languages. Through the integration, recruiters can select the desired job boards from the External Postings page of the job requisition and post the job to more than one job board that supports multiple languages.

Note: *For requisitions that have an approval workflow, postings cannot be made through Multiposting until the requisition is approved.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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*	Recruiting

	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.*	

Post Job

To post a job through Multiposting:

1. Select a default career site in the Career Sites section. This is required in order to post the job via Multiposting so that the posted jobs will be linked to the default career site.
2. Select **Multiposting** from the **Job Board Vendor** drop-down. This updates the options in the Job Boards section and the columns in the job boards table.
3. Click the **CREATE NEW POSTING** button. This opens a Multiposting window from which you can select the job boards and configure the posting. You must have a Multiposting account in order to post through Multiposting.

Once the job postings are configured, you can submit the requisition on the External Posting page.

Repost Job

The **REPOST JOB** button allows recruiters to repost a job posting. The button only displays if the active postings are in a Deleted, Error, or Expired status or is no longer active on any job boards.

To repost the job:

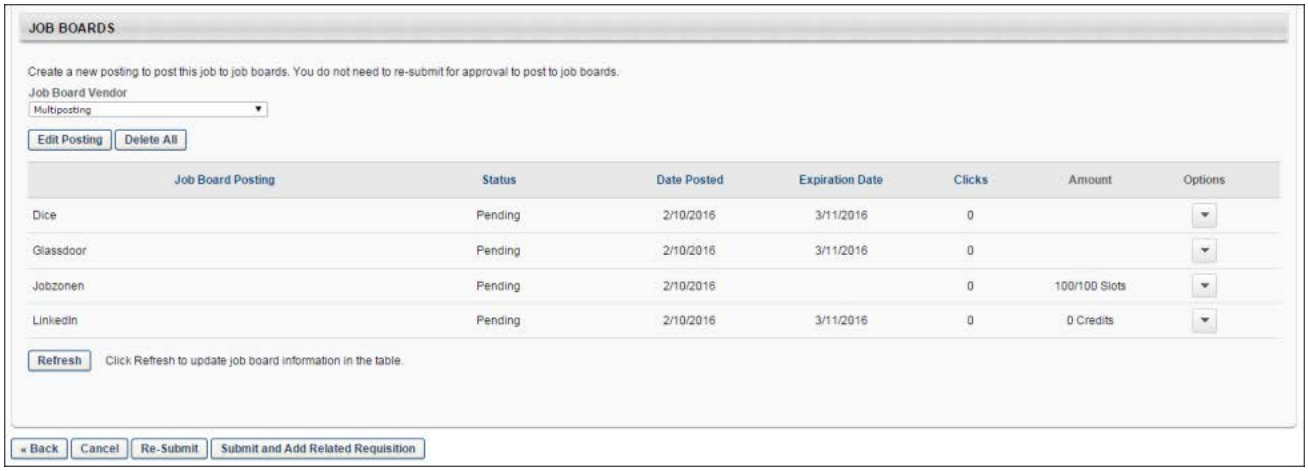
1. Click the **REPOST JOB** button. This opens a Multiposting window.
2. In the Multiposting window, you can edit any of the job details before reposting the job. Once you have finished making the changes in Multiposting, you will need to manually close the Multiposting window.
3. Then, click **REFRESH** on the External Postings page. This updates the job boards table to display the job boards to which the posting has been reposted. The status of the job boards changes to Pending or Active, and this enables the **EDIT POSTING** and **DELETE ALL** buttons to display. the **REPOST JOB** button will no longer display.

Job Boards Table

The following columns display in the job boards table when Multiposting is selected in the **Job Board Vendor** drop-down:

- Job Board Posting - This column displays the name of the job board to which the requisition is posted.
- Status - The following statuses of the job board display in the Status column:
  - Active

    - Deleted
    - Error
    - Expired
    - Pending
- Date Posted - This column displays the effective date of the job posting.
- Expiration Date - This column displays the date on which the requisition expires on the job board.
- Clicks - This column displays the number of clicks that the job board has received.
- Amount - This column matches the data in Multiposting and displays the correct amount type for the posting cost type entity. The amount displays in the user's language, if available.
    - Credits - This shows the remaining credits for the job board.
    - Slots - This shows the remaining/total slots for the job board.
- Options - The following options are available in the Options column:
    - Delete - You can delete a job posting that is in a Pending or Active status by clicking **Delete** from the options drop-down in the Options column. This opens a confirmation pop-up. Click **YES** to delete the posting, or click **NO** to cancel the delete action. Once the posting is deleted, click **REFRESH**. This updates the job board status to Deleted. The options drop-down is hidden when a job board is in a Deleted status.



Edit Posting

The **EDIT POSTING** button allows you to edit the posting in Multiposting. When clicked, the Multiposting window opens, where you can edit the posting. Once the updates are made, the job boards table on the External Postings page updates to display the latest data.

This button only displays once a job is posted via Multiposting.

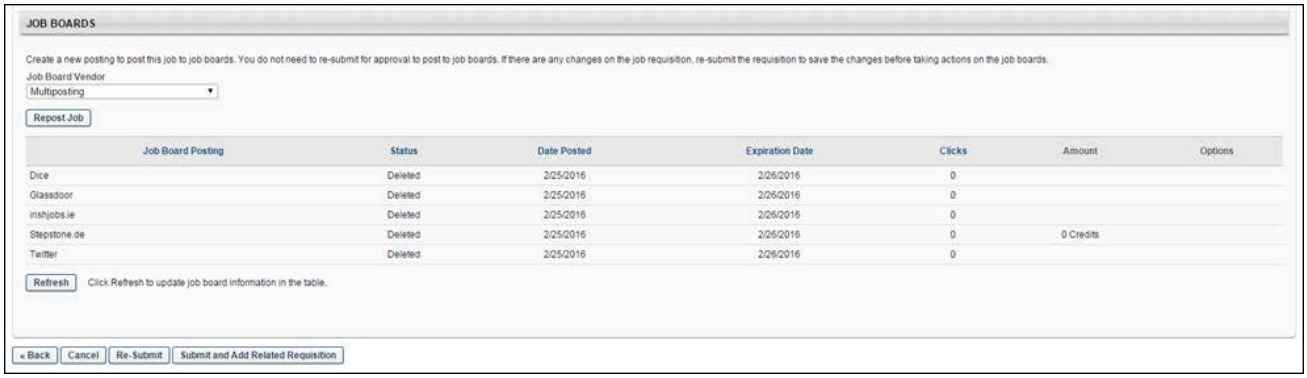
Refresh

The **REFRESH** button updates the job boards table to display the latest data from the job boards to which the job is posted.

Delete All

The **DELETE ALL** button allows you to delete all postings that are still pending and active on job boards. A confirmation pop-up opens. Click **YES** to delete the posting, or click **NO** to cancel the delete action.

The status for the job boards will change to Deleted when the **REFRESH** button is clicked.



Twitter

Twitter Integration Overview

The integration between Cornerstone and Twitter allows users to share posts directly from their Cornerstone Connect Live Feed to their Twitter feed. This is useful for users who wish to share interesting company updates with family and friends.

Use Cases

Troy is a Marketing Coordinator for a package delivery service at their office in New York. He sees a post on his Live Feed from a colleague stating "The Brooklyn Bridge has been completely shut down. Plan your commute accordingly!" Knowing that the delivery trucks use Twitter to broadcast traffic conditions, Troy re-posts this to Twitter so that the delivery drivers can complete their routes on time.

Considerations

Only updates that the user manually posts to the Connect Live Feed can be shared to Twitter.

Only text from user updates is shared to Twitter. Links and files are not shared.

Implementation

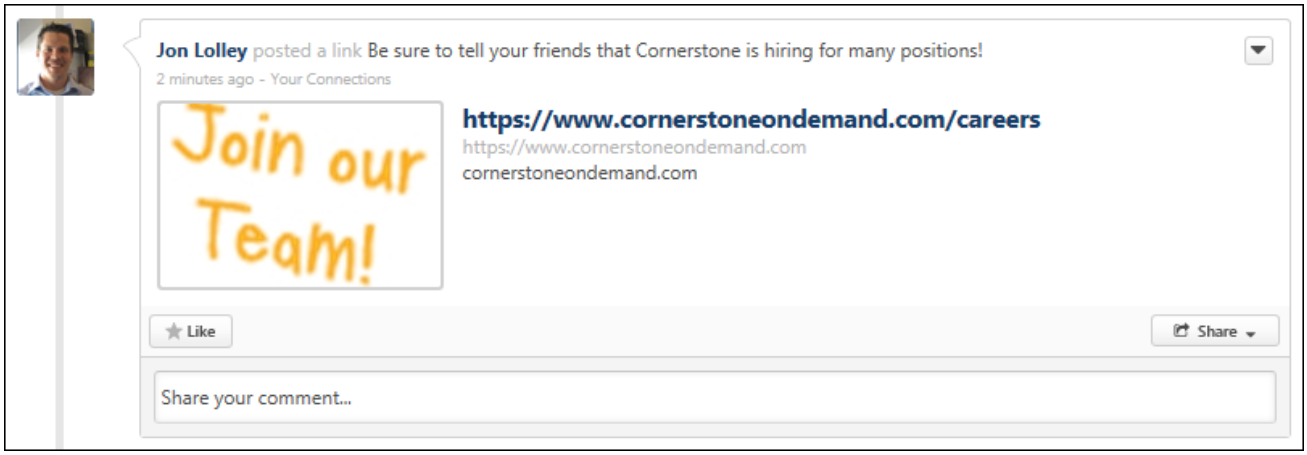
The Twitter integration requires New Connect. Also, users must have a Twitter account to utilize this integration.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is enabled via Edge Integrations.

Share Live Feed Posting to Twitter

When the Twitter integration is enabled, users who have a Twitter account can share any updates that any user in their feed has manually posted to the Connect Live Feed to their Twitter feed.

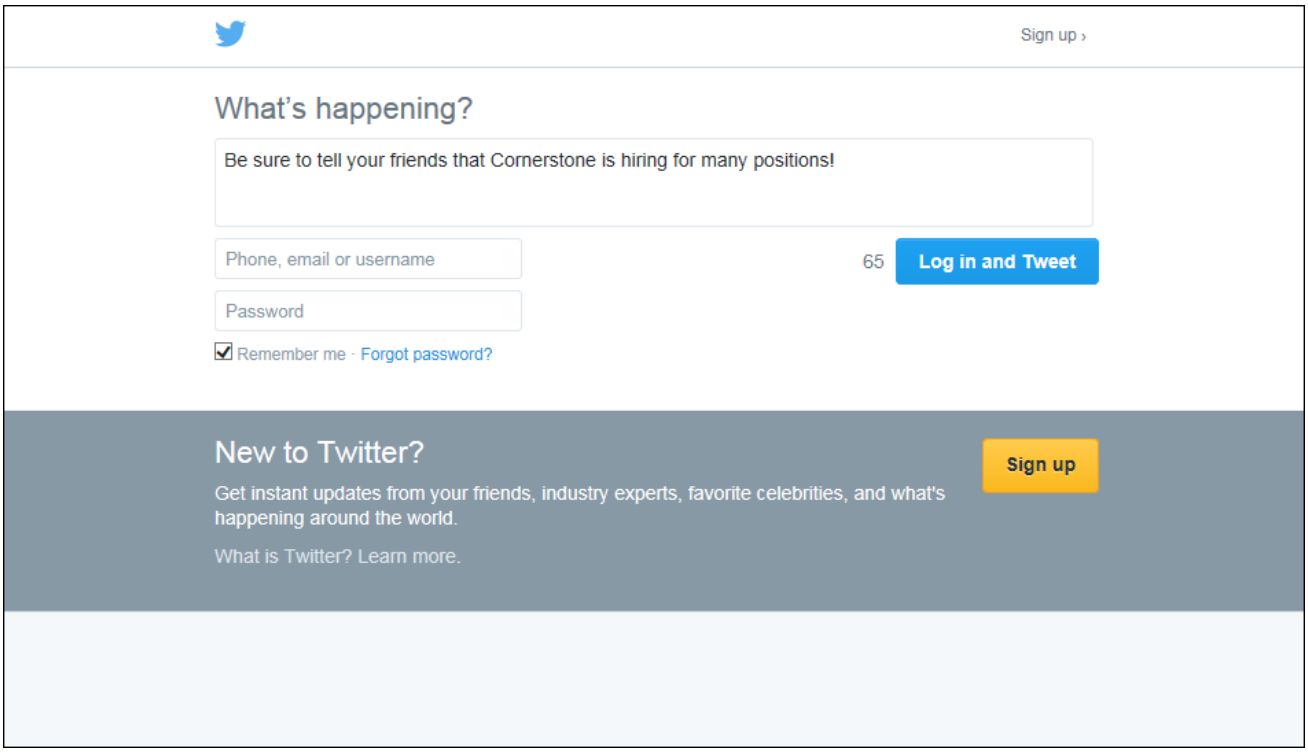
To share an update from the Connect Live Feed to Twitter, click the **SHARE** button in the lower-right corner of the update. Then, select **Twitter**. If you are logged in to Twitter, then you can modify the update and post it to your Twitter feed.



Log in to Twitter

When you attempt to share a posting to Twitter, the system checks your Internet browser's cookies to see if you are currently logged in to Twitter. If you are not currently logged in to Twitter, you are prompted to enter your Twitter credentials and log in.

Enter your Twitter credentials, and select **LOG IN AND TWEET**. You can also modify the posting text before



Tweet Posting

When you attempt to share a posting to Twitter, Twitter allows you to modify the posting text before sharing it to Twitter.

Modify the update text, as needed. Then, select **TWEET**.

WebEx Meeting Center Integration

The WebEx Meeting Center integration allows users and administrators to seamlessly navigate between Cornerstone's Learning Management System (LMS) and Cisco WebEx through WebEx's Single Sign On (SSO) functionality. This gives users and administrators one place to set up and launch WebEx meetings, including the ability to create and edit meeting instructors.

Implementation

The WebEx Meeting Center integration requires Cornerstone Learning and an WebEx Meeting Center account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

WebEx Training Center Integration

The WebEx Training Center integration allows users and administrators to seamlessly navigate between Cornerstone's Learning Management System (LMS) and Cisco WebEx through WebEx's Single Sign On (SSO) functionality. This virtual instructor-led training (vILT) integration gives Learning administrators the ability to add instructors, create and manage sessions, and track attendance from within Cornerstone. Cisco WebEx sessions can be launched from Cornerstone directly into WebEx.

Implementation

The WebEx Training Center integration requires Cornerstone Learning and an WebEx Training Center account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Learning

Course Recommendations Exclusion Flag

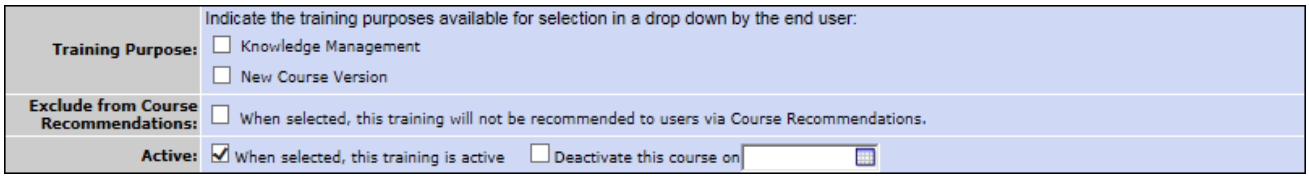
With the April '16 release, administrators now have the ability to enable a Training Completion page. In addition, a Course Recommendations Preview Program is being conducted, which provides course recommendations to users on the Training Completion page.

With this enhancement, the General tab of the Course Catalog now has an additional option that enables administrators to exclude a learning object (LO) from being recommended to users. Although the ability to provide course recommendations is not widely available, this option enables administrators to proactively exclude certain LOs from course recommendations.

To support this enhancement, the General tab of the Course Catalog now has an additional option that enables administrators to exclude a learning object (LO) from being recommended to users.

- **Exclude from Course Recommendations** - When this option is selected, the course will not be included in the list of recommended courses that is displayed on the Training Completion page when a user completes a course. ***Note:*** *The list of courses that are recommended to users is refreshed every seven days.*

This field can be edited when batch editing LOs via the Course Catalog.



Use Cases

Lauren is an administrator at Acme Corporation. She does not currently have Course Recommendations enabled for her portal, but she wants to begin the process of identifying and excluding training that should not be included in recommendations once Course Recommendations is enabled.

Lauren navigates to the Course Catalog and searches for specific training that she knows should never be recommended to users, such as compliance training. She checks the 'Exclude from Course Recommendations' check box and saves the learning object. She is also able to batch edit the check box for multiple learning objects.

Lauren is now confident that when Course Recommendations are enabled, the Training Completion page will display course recommendations that will actually encourage users to continue their professional growth and development.

Considerations

The list of courses that are recommended to users is refreshed every seven days.

Implementation

This functionality is only available for organizations using the Learning module.

Security

The following existing permission applies to this functionality:

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

Data Load Wizard - Support Audit Trail for Event, Session, and Transcript Loads

With this enhancement, an audit trail is available when an Admin loads events, sessions or transcripts through the Data Load Wizard.

The following fields in each load are audited:

Events

- Title
- Description
- Provider
- Event custom fields
- LO active status

Sessions

- Title
- Description
- Provide (vendor)
- Session custom fields

Transcripts

- Transcript custom fields
- Credit

Implementation

This functionality is automatically enabled for all organizations using the Event, Session, or Transcript load.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Data Load Wizard - Events	Enables administrator to load event data via the Data Load Wizard. This permission also enables administrators to track data loads and manage data load templates. This is an administrator permission.	Data Load Wizard
Data Load Wizard - Learning	Enables administrator to load learning data via the Data Load Wizard. This permission also enables	Data Load Wizard

	administrators to track data loads and manage data load templates. This is an administrator permission.	
Data Load Wizard - Load Sessions	Enables administrator to load session LO data via the Data Load Wizard. This permission also enables administrators to track data loads and manage data load templates. This is an administrator permission.	Data Load Wizard
Data Load Wizard - Load Transcripts	Enables administrator to load transcript data via the Data Load Wizard. This permission also enables administrators to track data loads and manage data load templates. This is an administrator permission.	Data Load Wizard

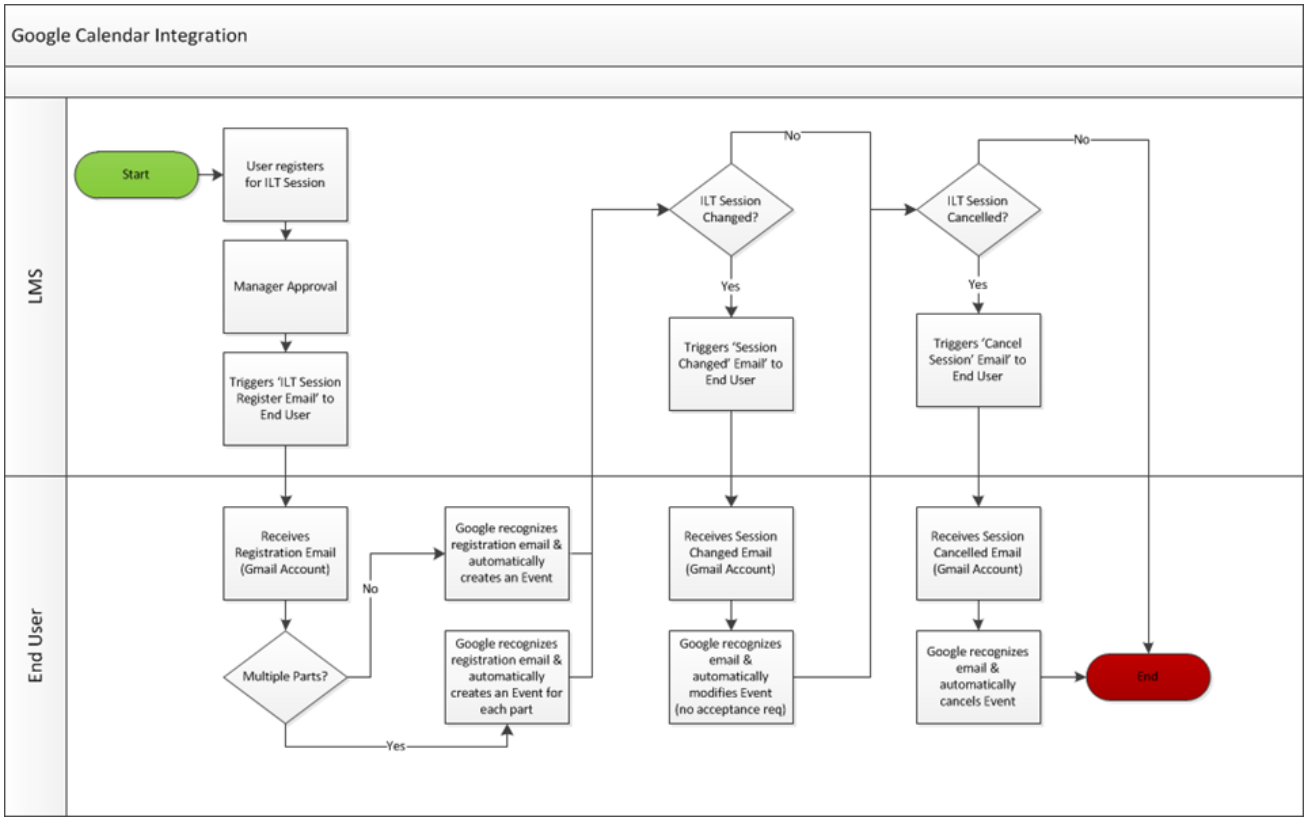
Google Calendar Integration

Google Calendar Integration

Prior to this enhancement, the system supported integration with Outlook, including meeting invitations and calendar attachments.

With this enhancement, the system now also supports integration with Google Calendar. Administrators can configure certain email triggers to include meeting invitations or calendar attachments. When a user using Gmail receive a meeting invitations from the system, their Google Calendar is automatically updated with the appropriate meeting information.

Workflow



Use Cases

Lauren is an employee at Acme Corporation, which utilizes Google applications for their email and calendar tools. Lauren has registered for an instructor-led training session on Executive Presence. The session consists of one part.

Lauren's manager approves the session and Lauren receives a registration meeting invitation from the Acme portal. This meeting invite contains information on the session. The invite displays directly on Lauren's Google calendar even though she has not accepted the invite. In addition, the invitation automatically blocks the time on her calendar as Busy.

The next day, Lauren receives a new meeting invite from the Acme portal with an updated start time. Her Google calendar is automatically updated with the new start time of the

session. The next week, Lauren receives a Cancelled meeting invite indicating that the session has been cancelled. The event is automatically removed from her Google calendar.

Considerations

When a meeting invite is sent, the event is automatically added to the user's calendar and set to busy even if no response is provided. The meeting responses do not affect the user's registration status in the system.

The event description displays the body of the email trigger. The maximum number of characters that will be displayed in the event description is 8,192. Any additional characters are removed.

Sessions that use a combination of meeting invites and calendar attachments for the same event are not supported.

Implementation

This functionality is automatically enabled for all organizations using the Learning module.

Security

The following existing permission applies 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

Email - Create/Edit - Calendar Options

With this enhancement, the system now supports integration with Google Calendar. Administrators can configure certain session-related email triggers to include meeting invitations or calendar attachments.

The Calendar Options are available when creating or editing an email via Email Management or when configuring custom emails for a learning object (LO).

To create an email, go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT. Then, click the Add Email icon in the Options column of the email action for which you would like to create an email. This opens the Create New Email page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

The following fields and options have been renamed:

- **Outlook Options** - This field is now titled **Calendar Options**.
- Outlook meeting invite - This option is now titled "Meeting invite."
  - Reminder - This option is now titled "Reminder (Outlook only)."
- Outlook calendar attachment - This option is now titled "Calendar attachment."

The following options are available in the **Calendar Options** field:

- **Meeting invite** - This option sends the email as a meeting invite with the standard meeting options. For Google Calendar meeting invites, the event is automatically added to the user's calendar and set to busy even if no response is provided. The meeting responses do not affect the user's registration status in the system. The event description displays the body of the email trigger. The maximum number of characters that will be displayed in the event description is 8,192. Any additional characters are removed. Any users in the CC field also receive a meeting invite.
  - Yes - Selecting this option keeps the event on the user's calendar with a Yes status.
  - Maybe - Selecting this option keeps the event on the user's calendar with a Maybe status.
  - No - Selecting this response removes the event from the user's calendar. This does not affect the user's registration status.

- **Calendar attachment** - Selecting this option sends the email with a calendar attachment. When the attachment is opened and saved, the session is automatically added to the user's calendar.
- **None** - This option is selected by default. Selecting this option sends the email without calendar features.
- **Reminder (Outlook only)** - The reminder functionality only applies to Outlook meetings.

Multi-part Sessions

When configuring meeting invites for multi-part sessions, each session part triggers an individual email.

Emails Triggered When Editing a Session Part

When editing a session part, the following updates trigger a new email:

- A new session part is added.
- A session part is cancelled.
- The time, name, or location of a session part is modified.

Training Details Link Email Tag

When creating or editing an email based on the email triggers that are listed below, a new TRAINING.DETAILS.LINK email tag is now available. This tag displays a link to the training details for an ILT session.

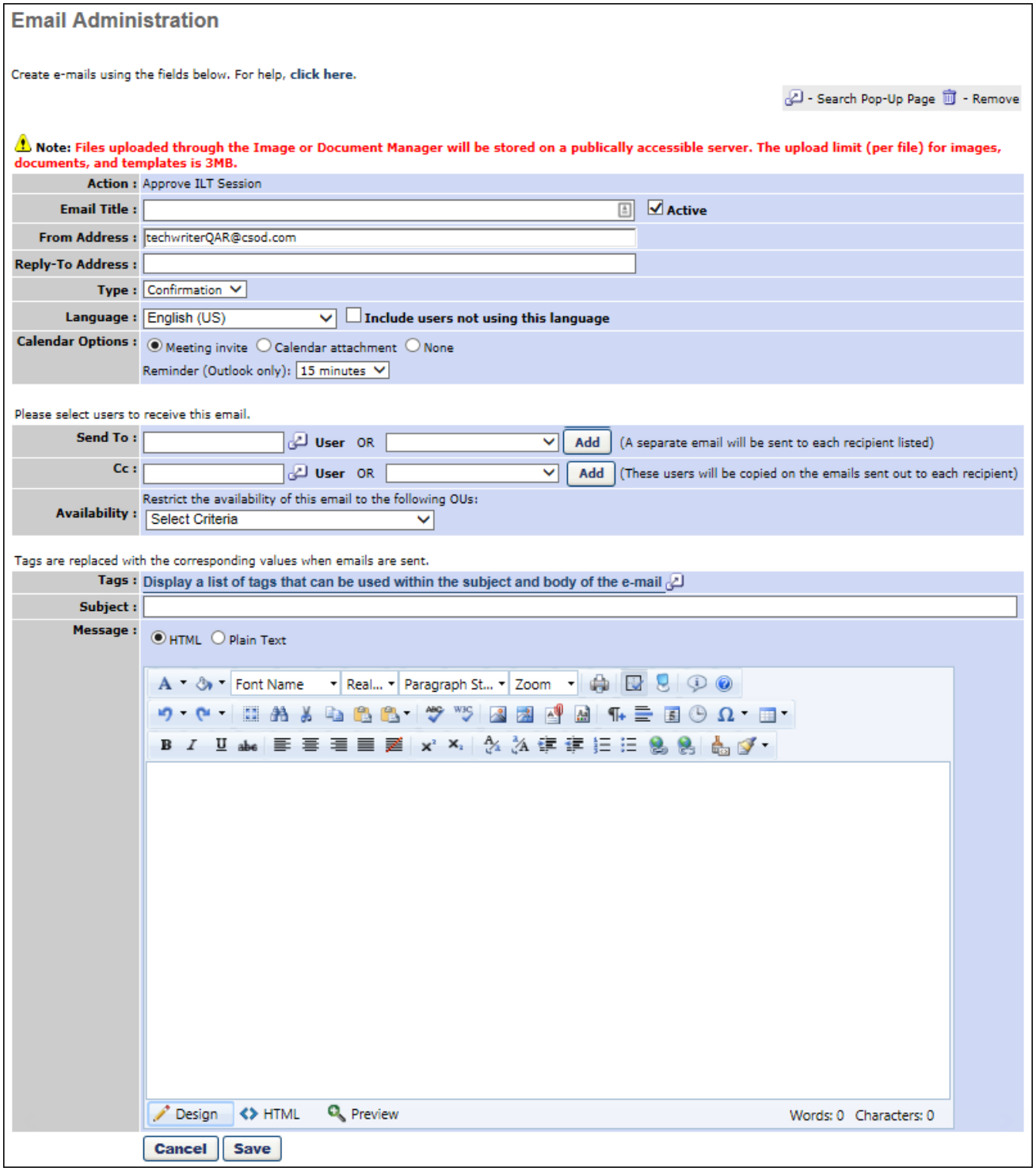
Emails Triggers

The Calendar Options are only available for the following email triggers:

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Approve ILT Session	Approval settings can be set within the Event/Session or within the user details page. If approval is required, the requested training will remain in pending approval status until the approver approves, defers, or denies the request. This email is fired when an Approver approves a request for an ILT session. This email can be used to notify the student that the request has been approved or to notify a particular approver in the approval workflow (e.g., Cost center approver or User's manager).	Instructor Led Training
Cancel Registration (with withdrawal penalty)	In the Event/Session Details step, there is a Penalty for Withdrawal column. There is an Add Withdrawal Penalty link that opens up text boxes to apply a	Instructor Led Training

	percentage or dollar amount, and the amount of days prior to the Session date when the user cancels, where these would be applied. Once a user withdraws from a Session, the selected recipients will receive this email, and the withdrawal penalty is applied.	
Cancel Registration (without withdrawal penalty)	In the Event/Session Details step, there is a Penalty for Withdrawal column. If the Add Withdrawal Penalty is not selected, and the user withdraws from a Session, the selected recipients will receive this email stating that no withdrawal penalty has been applied.	Instructor Led Training
Cancel Session	ILT Session is cancelled. REASON.CANCEL.SESSION tag is available for the Cancel Session email so that the reason entered by the administrators when the Session was cancelled can be included in the email. This tag will display the reason selected in the drop-down by the administrator who cancelled the Session.	ILT Administration
Grant Waitlist Request	Once a user has submitted a Waitlist Request, they will remain in Waitlisted status until an administrator makes the decision to grant or deny the request. If the ILT administrator grants a user's request to attend a session, this email will be triggered.	Instructor Led Training
ILT Session Register	Once a user Registers for an ILT session, this email can be sent to the student, approvers, assignors, instructors, and anyone else who would need information about the registered session.	Instructor Led Training
Session Changed	The Session Changed email is triggered if the following Session fields were changed: Advanced Registration Settings, Instructor, Location, No Show Penalty, Pre-work/Post-work/Prerequisite Details, Session Charge Date, Start or End Dates and Times, and Waitlist Deadlines. An email tag called **COMMENT** appears as an option for this email. This tag will display the comments entered by the Session administrator or instructor when the changes for this Session were	ILT Administration

	saved.	


Email Administration
Create e-mails using the fields below. For help, click here.
- Search Pop-Up Page - Remove
Note: Files uploaded through the Image or Document Manager will be stored on a publically accessible server. The upload limit (per file) for images, documents, and templates is 3MB.
Action : Approve ILT Session
Email Title :
Active
From Address : techwriterQAR@csod.com
Reply-To Address :
Type : Confirmation
Language : English (US)
Include users not using this language
Calendar Options : Meeting invite Calendar attachment None
Reminder (Outlook only): 15 minutes
Please select users to receive this email.
Send To : User OR Add (A separate email will be sent to each recipient listed)
Cc : User OR Add (These users will be copied on the emails sent out to each recipient)
Availability : Restrict the availability of this email to the following OUs:
Select Criteria
Tags are replaced with the corresponding values when emails are sent.
Tags : Display a list of tags that can be used within the subject and body of the e-mail
Subject :
Message : HTML Plain Text
Font Name
Real...
Paragraph St...
Zoom
Design
HTML
Preview
Words: 0 Characters: 0
Cancel
Save

Training Details - Session Details Table - Add to Calendar

With this enhancement, the system now supports integration with Google Calendar.

When a user views the Training Details page for a session in which they are registered, the Session Details table displays information for each part of the session. The **Add to Calendar** link enables the user to add the event to their Google calendar or Outlook calendar.

Increased Video Size

Prior to this enhancement, videos viewed on the Transcript or Learning Object (LO) Details page were displayed in a medium frame.

With this enhancement, videos viewed on the Transcript or LO Detailed page are displayed in a large frame.

Considerations

The Curricula Player and Cohort Player are not impacted by this enhancement. Videos displayed in these players will continue to be displayed in a large frame.

Implementation

This functionality is automatically enabled for all organizations using the Learning module.

Learning Rewards & Recognition

Rewards and Recognition Overview

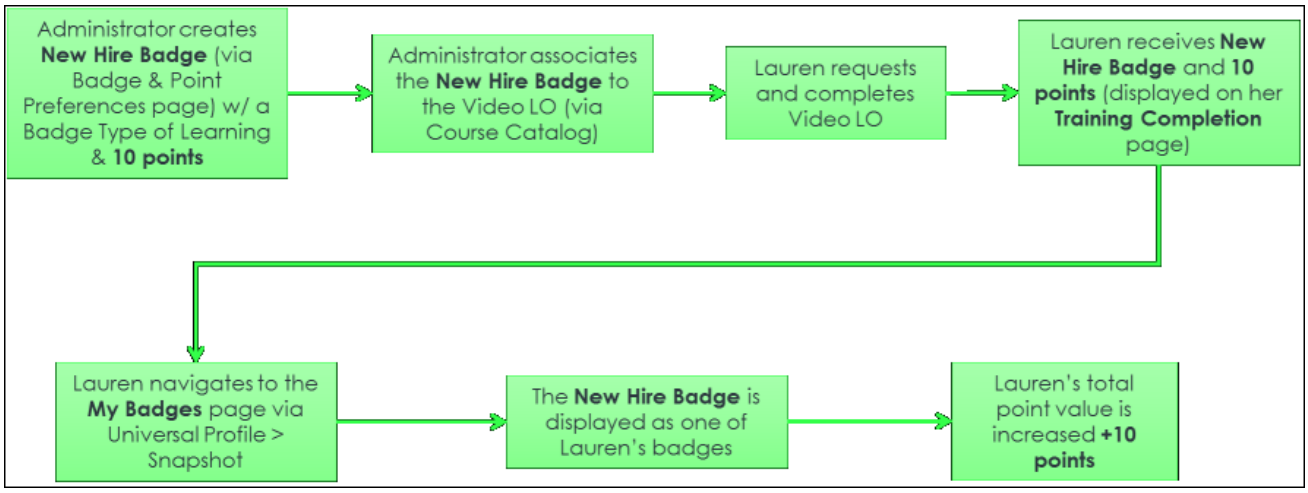
Prior to this enhancement, badges were only used when providing feedback for users via Universal Profile.

With this enhancement, badges and points can now be awarded automatically when a user completes training. Also, the points that are associated with a badge are now utilized throughout the system. For example, a manager can view a subordinate's total number of badges and points within the Universal Profile Snapshot, and a Leaderboard page displays employees with the most points across the user's organizational units (OUs).

Administrators can now create Learning badges that are only awarded when a user completes training. Administrators can associate points and a badge to learning objects (LOs) via the Course Catalog so that users can be awarded a specific number of points and a badge when they complete the LO. Administrators can also enable widgets in the Universal Profile - Snapshot that display a user's total number of badges and points. These widgets can be clicked to display all of the user's badges or to view the points leaderboard.

Organizations can use rewards and recognition to make the learning experience more engaging and encourage employees to complete training.

Workflow



Use Cases

1. Lauren is a new employee at Acme Corporation. As part of her new hire training, she is required to watch a video about the company and read a compliance document about office policies.
2. She completes her compliance document and is brought to the Training Completion page where she sees that she has received 50 points for completing the training. Lauren watches the video on Acme Corporation and receives a New Hire Badge for completing the training.
3. Lauren is able to view all of the Performance and Learning badges that she has accumulated over time via the new My Badges page. She is also able to view a new

Leaderboard page where she sees the employees in her Department who have the most points.

4. Lauren continues to complete new training to receive more points and badges.

Considerations

- Points and badges can only be associated with a LO via the Course Catalog. As a result, any LO that cannot be edited via the Course Catalog cannot have points or badges associated with it. Points and badges cannot be associated with certifications. As a result, users will not receive points or badges when they complete a certification.
- For LOs that are comprised of other LOs, such as curricula, libraries, and programs, the user receives points for the larger LO (e.g., curricula, library) and any LOs that the user completed within the structure of the larger LO.
    - When a LO that is comprised of other LOs is completed, the Training Completion page only displays the badge and points that are associated with the larger LO. It does not display any badges or points that were awarded by completing the LOs within the structure of larger LO.
- For tests, points and badges are only awarded if the user passes the test.
- The user is not awarded a badge or points for a LO if the user completes an equivalent LO, is marked Exempt, is granted an exception, or is proxy enrolled in a Completed status.
- Reporting is not currently available for points or badges.
- The Data Load Wizard does not currently support points or badges.

Implementation

This functionality is automatically available to all organizations using the Performance or Learning module. However, the Learning Badges and Points are only available to organizations using the Learning module.

- For portals using the Learning and Performance modules, the Badges widget is driven by a combination of Learning and Feedback badges. The Leaderboard widget is driven by a combination of Learning points and points associated with Learning and Feedback badges.
- For portals using the Learning module and not the Performance module, the Badges widget is driven by Learning badges. The Leaderboard widget is driven by a combination of Learning points and points associated with Learning badges.
- For portals using the Performance module and not the Learning module, the Badges widget is driven by Feedback badges. The Leaderboard widget is driven by points associated with Feedback badges.
- Portals that are not using the Performance or Learning module cannot use the Badges or Leaderboard functionality.

By default, the Learning Badge - View and Learning Points - View permissions are only available to the default System Administrator role. As a result, the Points and Badges fields are not displayed on the LO Details and Training Completion pages by default. In order to

enable these fields for end users, the Learning Badge - View and Learning Points - View permissions must be granted to the appropriate users.

With regards to the Badges Widget on the Snapshot page, this widget is disabled by default, and must be enabled via Snapshot General Preferences. Also, the Snapshot - Badges permission is automatically added to the default System Administrator role and must be granted to the appropriate users.

With regards to the Leaderboard Widget on the Snapshot page, this widget is disabled by default, and must be enabled via Snapshot General Preferences. Also, the Snapshot - Leaderboard permission is automatically added to the default System Administrator role and must be granted to the appropriate users.

The Badge Preferences - Manage permission is renamed and is now titled Badge & Point Preferences. Any users who previously had this permission are not affected. However, the Badge & Point Preferences permission must be granted to administrators who need the ability to create and manage badges and configure the Leaderboard.

By default, all LOs have zero points and no badge assigned to them. These must be configured via the Course Catalog.

Glossary

- Badge - A form of employee recognition that can be awarded when a user receives positive feedback or when a user completes training. Badges may have an associated point value. Depending on the portal configuration, users may be able to view their badges via a widget on the Universal Profile - Snapshot page.
- Leaderboard - A user may receive points for completing training. Also, a user may be awarded a badge by completing training or receiving positive feedback from another user. When a user receives a badge, they are also awarded any points that are associated with the badge. The Leaderboard is a page within the Universal Profile - Snapshot that enables users to view their total number of points, their overall points ranking within the organization, and the top 10 users who have the most points.
- Point - A user may receive points for completing training. Also, a user may be awarded a badge by completing training or receiving positive feedback from another user. When a user receives a badge, they are also awarded any points that are associated with the badge. Depending on the portal configuration, users may be able to view their points and a points leaderboard via a widget on the Universal Profile - Snapshot page.

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Badge - View	Grants ability to view the Badge field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning

Learning Points - View	Grants ability to view the Points field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning

Snapshot - Badges	Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

Snapshot - Leaderboard	Enables user to view the Leaderboard widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Leaderboard widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

The Badge Preferences - Manage permission is renamed and is now titled Badge & Point Preferences - Manage. This permission is now in the Core Administration category. Also, the page to which this permission controls access, the Badge Preferences page, is renamed and is now titled Badge & Point Preferences.

These changes will be reflected throughout Online Help when this functionality is released.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Badge & Point Preferences - Manage	Enables user to access and edit preferences on the Badge & Point Preferences page. The availability of this permission is controlled by a	Core Administration.

	backend setting. This permission can be constrained by OU and User's OU. This is an administrator permission.	

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
Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Snapshot Preferences - Manage	Enables administrator to access and edit the Snapshot Preferences page. This permission can be constrained by Employee Relationship, OU, and User's OU. This is an administrator permission.	Universal Profile

Badge & Point Preferences - Badges

Prior to this enhancement, badges were only used when providing feedback for users via the Universal Profile.

With this enhancement, badges can now be awarded automatically when a user completes training. Also, the points that are associated with a badge are now utilized throughout the system. For example, a manager can view a subordinate's total number of badges and points within the Universal Profile Snapshot and a Leaderboard page displays employees with the most amount of points across the user's organizational units (OUs).

In order to support this enhancement, the Badge Preferences page is renamed and is now titled Badge & Point Preferences. This page is accessible via Core Preferences and Learning Preferences. Also, the Badge & Point Preferences page is divided into two tabs, Badges and Points.

The Badges tab contains all of the functionality from the previously existing Badge Preferences page.

To manage Badges and Points:

- Go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > BADGES & POINTS.
- Go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > BADGES & POINTS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Badge & Point Preferences - Manage	Enables user to access and edit preferences on the Badge & Point 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.	Core Administration.

Default Learning Badges

Default Learning badges are automatically available. These badges have a Badge Type of Learning and are active by default so that administrators can associate them to LOs via the Course Catalog.

The following default Learning badges are available:

- Curriculum Leader - Successfully completed a curriculum course.
- Onboarded - Recognizing a new hire that has been successfully onboarded.
- Presentation Expert - Successfully completed a presentation course.
- Safety First - Successfully completed a safety course.

- Video Master - Successfully completed a video course.

Copying Badges

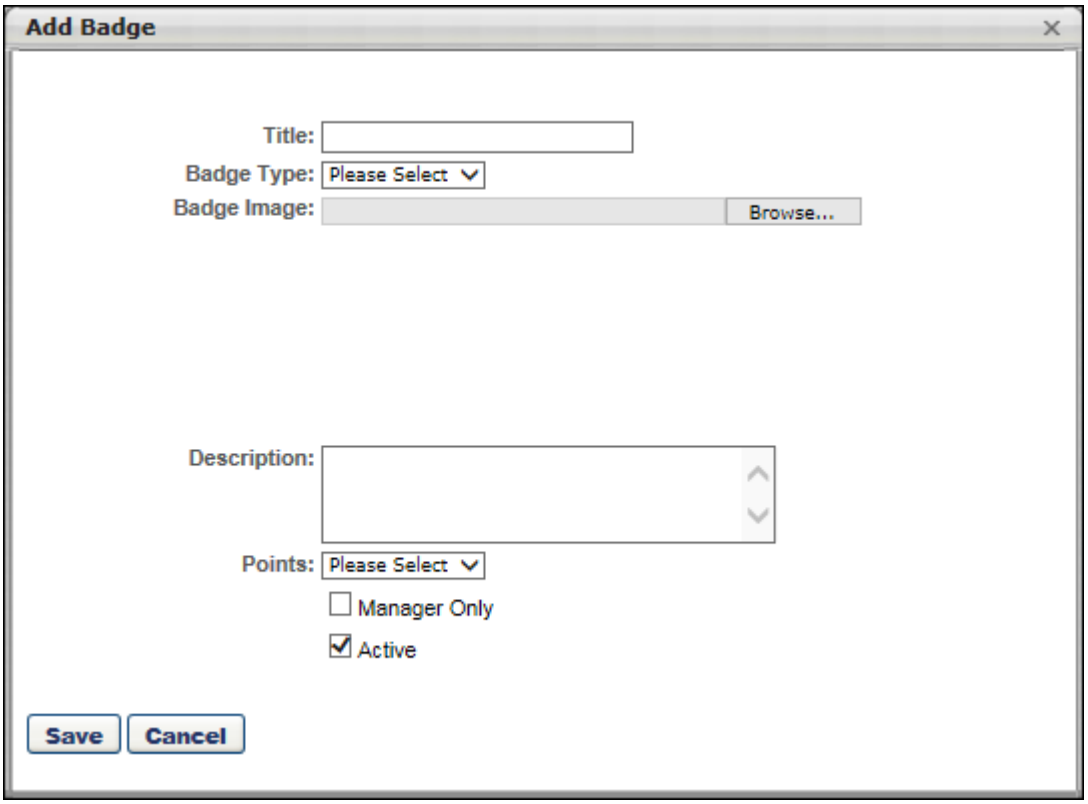
When copying a badge, a Copy Badge pop-up is now opened, in which the administrator can edit the badge details prior to saving the badge.

Adding Badges

When adding a badge, the following fields are new or updated:

- Title - When editing a badge, modifications to the badge title are reflected on the Training Completion page and Badges sub-page for users who have already completed training and earned the badge.
- Badge Type - From the drop-down, select the purpose of the badge. This will determine in which scenarios the badge can be awarded. When editing a badge, the badge type cannot be modified.
  - Feedback - Select this type when the badge should only be used when awarding feedback.
  - Learning - Select this type when the badge should only be used when a user completes training.
- Badge Image - When editing a badge, modifications to the badge image are reflected on the Training Completion page and Badges sub-page for users who have already completed training and earned the badge.
- Points - With this enhancement, a user's badge points are now visible on the Universal Profile Snapshot page and on the Points Leaderboard. When editing a badge, changes to this field only impact future instances of this badge. The points that are associated with badges that have already been awarded will not be changed.
- Manager Only - This option is only available when the Badge Type is set to Feedback.

As with Feedback badges, badge images should be square with a recommended size of 100 x 100 pixels. To have a square badge image display properly on the My Badges page, use a 66 x 66 pixel image centered on a white square that is 100 x 100 pixels.



Deleting or Deactivating Badges

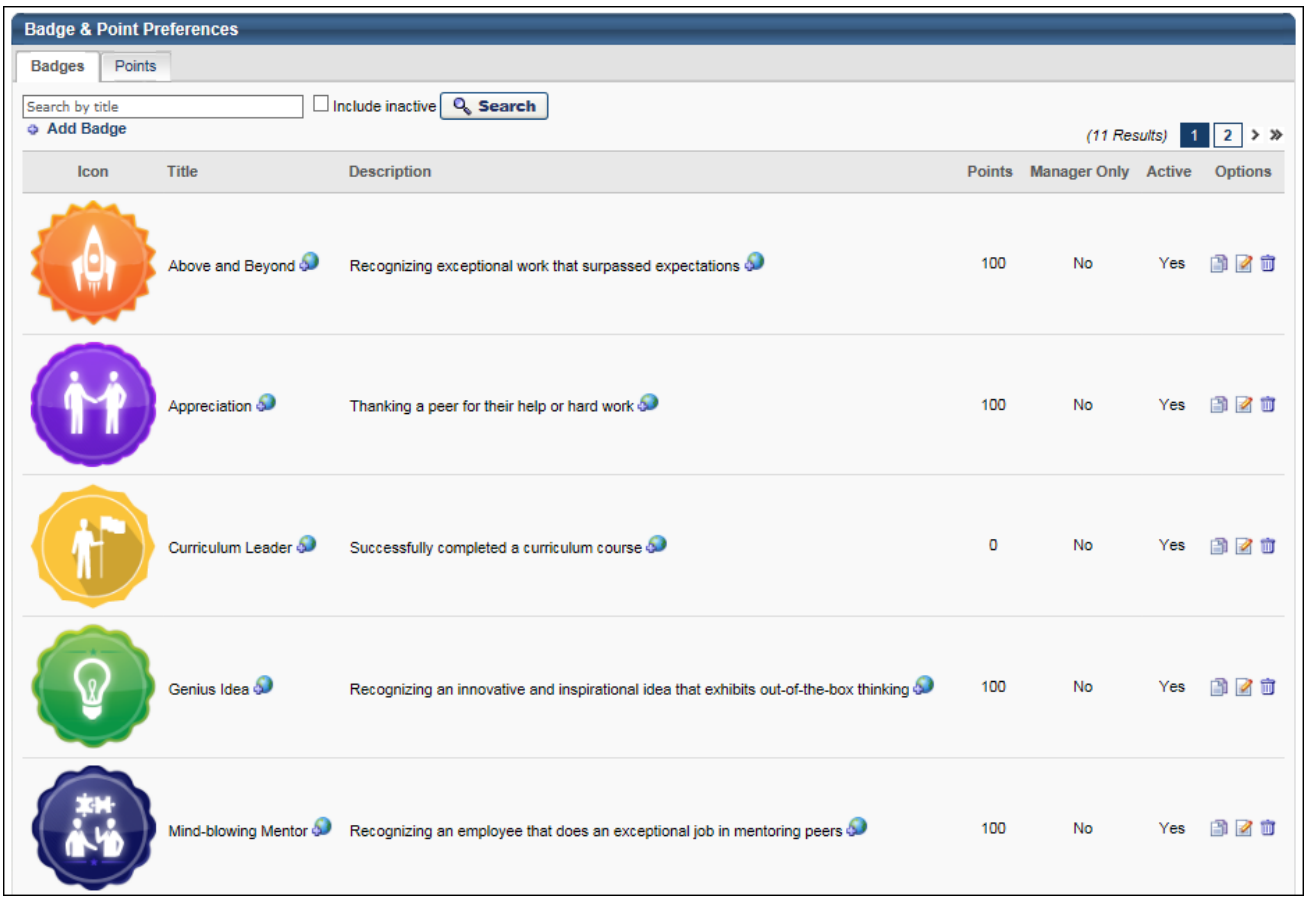
Administrators are able to delete badges or make them inactive.

Learning Badges:

- Deactivate Badge:
  - The badge will still display on LO Details or the Course Catalog (if already associated to an existing LO).
  - The badge will no longer display in the Badge Search Results (admins cannot associate to LOs via the Course Catalog).
  - Any users who completed training (and were awarded the badge) will not be impacted; the badge will still display on the Training Completion page and on the Badges widget.
  - Any users who have not yet completed the training (with the badge associated to it) will still be awarded the badge when they complete the training.
- Delete Badge:
  - The badge will no longer display on LO Details or the Course Catalog (if already associated to an existing LO).
  - Any users who completed training (and were awarded the badge) will not be impacted; the badge will still display on the Training Completion page and on the Badges widget.
  - Any users who have not yet completed the training (with the badge associated to it) will not be awarded the badge when they complete the training.

Feedback Badges (existing functionality)

- The functionality associated with deleting and deactivating a feedback badge is unchanged.
  - The badge no longer displays in the results when attempting to award a badge via Feedback (i.e., users cannot award that badge to other users).
  - The badge will continue to display in Feedback and the Badges widget (if it was already awarded to a user).



Badge & Point Preferences - Points

With this enhancement, a new Leaderboard page is now available within Universal Profile: Snapshot.

In order to support this enhancement, the Badge & Point Preferences page is divided into two tabs, Badges and Points.

The Points tab of the Badge & Point Preferences page enables administrators to configure the Leaderboard page that exists within Universal Profile: Snapshot.

To manage Badges and Points:

- Go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > BADGES & POINTS.
- Go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > BADGES & POINTS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Badge & Point Preferences - Manage	Enables user to access and edit preferences on the Badge & Point 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.	Core Administration.

Leaderboard

This section enables administrators to define which filter options are available to the user when viewing the Leaderboard. When an option is selected, the corresponding filter option is able to select on the Leaderboard page. The various organizational unit (OU) filter options enable the user to compare their points totals with other users from the same OU. The following options are available:

- User's Division
- User's Position
- User's Location
- User's All Custom OU Type - If a user has more than one custom OU type configured for their user record, then all applicable custom OU types are available in the filter.

By default, User's Division is selected, and all other options are not selected. At least one option must be selected.

Overwrite Settings

Choose whether or not to overwrite custom settings for child division OUs. If you choose to overwrite custom settings for child division OUs, the selected settings are applied to both

new and existing child OUs. Any previously customized child OUs are updated with the selected settings.

If this option is unselected, then only the child OUs that do not have customized settings will be updated, as well as any OUs that are added in the future.

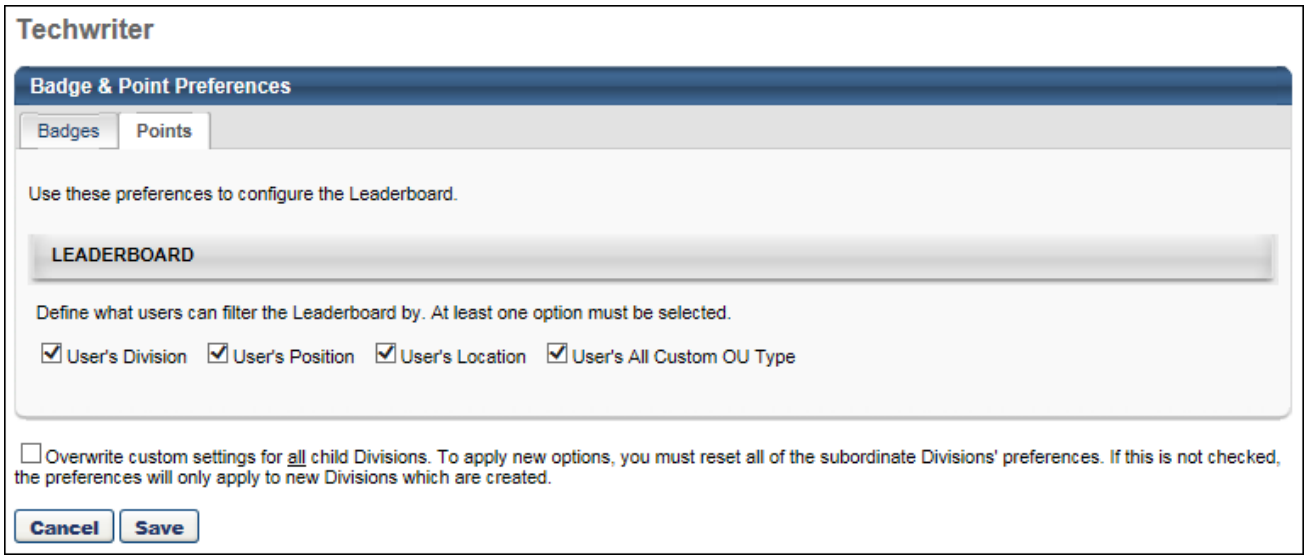
A child OU that has not been customized always inherits from the parent, regardless of whether this option is selected.

An OU is considered customized if its preferences or settings have been changed.

Note: *This option only applies to the Points tab.*

Save/Cancel

Click **SAVE** to commit any unsaved changes. Or, click **CANCEL** to discard any unsaved changes.



Snapshot General Preferences

With this enhancement, the points that are associated with a badge are now utilized throughout the system. For example, a manager can view a subordinate's total number of badges and points within the Universal Profile Snapshot and a Leaderboard page displays employees with the most amount of badge points across the user's organizational units (OUs).

In order to support this enhancement, administrators can now configure whether or not a Badges and Leaderboard widget are available on the Snapshot page.

To access the Snapshot General Preferences page, go to ADMIN > TOOLS > CORE FUNCTIONS > UNIVERSAL PROFILE > SNAPSHOT GENERAL.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot Preferences - Manage	Enables administrator to access and edit the Snapshot Preferences page. This permission can be constrained by Employee Relationship, OU, and User's OU. This is an administrator permission.	Universal Profile

The following widgets can now be enabled and configured on the Snapshot General Preferences page:

- Badges - This widget displays the number of badges the user has been awarded. This includes all types of badges (e.g., Feedback and Learning). The My Badges subpage enables users, managers, and administrators to view all of the badges that the user has been awarded. This page displays all types of badges.
- Leaderboard - This widget displays the number of points the user has been awarded from completing training, receiving training badges, and receiving positive feedback badges. The Leaderboard subpage displays a full leaderboard of users and their point totals.

The following options are available for both widgets:

- Widget Title - In this field, enter the title that should appear at the top of the widget on the Universal Profile - Snapshot page. 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.
- SubPage Title - In this field enter the title that should appear at the top of the subpage when the corresponding widget is clicked. For example, when the Badges widget is clicked, the Badges subpage opens. 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.
- Display Widget - This option determines whether the widget should appear on the Universal Profile - Snapshot page. Select this option to display the widget, or deselect this option to hide the widget.

Define the order, title and preferences for each widget. Order can be configured by dragging and dropping each widget item on the page. Please note that the visibility of widgets is also based on permissions and widget size, so the order of widgets may differ from the administrator-defined order.

Snapshot General Preferences

Widget Type	Title	Widget Preferences	Display Widget
Documents	Widget Title Documents Subpage Title Documents	Displays total number of documents uploaded for employee.	☑
Compensation	Widget Title Compensation Summary	☐ Display user's current salary Display the following compensation components: Type: Select Components: Select Type: Select Components: Select Type: Select Components: Select Type: Select Components: Select	☑
Competencies	Widget Title Competency Ratings Subpage Title Competency Ratings	◉ Display rating of most recently completed assessment ○ Display rating of the following assessment:	☑
Development Plans	Widget Title Development Plan Progress Subpage Title Development Plan	◉ Display progress of primary plan only ○ Display average progress of all plans	☑
Goals	Widget Title Goals Subpage Title Goals	Displays total progress of all goals for the current period	☑
Peers	Widget Title Peers	Displays total number of peers identified for the employee.	☑
Review	Widget Title Reviews Subpage Title Reviews	◉ Display rating of most recently completed review ○ Display rating of the following review:	☑
Succession	Widget Title Succession Subpage Title Succession	◉ Display number of User-based potential successors ○ Display number of Position-based potential successors ○ Display SMP Metric Fields	☑
Badges	Widget Title Badges Subpage Title My Badges	Displays total number of badges awarded to the employee	☑
Leaderboard	Widget Title Leaderboard Subpage Title Leaderboard	Displays total number of points awarded to the employee	☑

☐ 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.

Cancel Submit

Course Catalog - General - Points and Badge

With this enhancement, badges can now be awarded automatically when a user completes training. Also, the points that are associated with a badge are now utilized throughout the system. For example, a manager can view a subordinate's total number of badges and points within the Universal Profile Snapshot and a Leaderboard page displays employees with the most amount of badge points across the user's organizational units (OUs).

In order to support this enhancement, administrators can now associate a badge with a learning object (LO) via the Course Catalog. Administrators can also set the number of points the user will receive when they complete the training. If there are points associated with the badge, then the user receives the points from the badge as well.

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

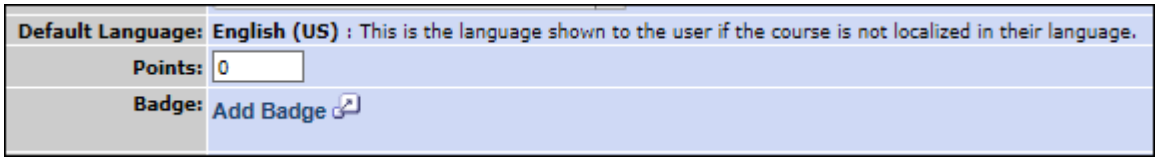
The following options are now available on the General tab of the Course Catalog:

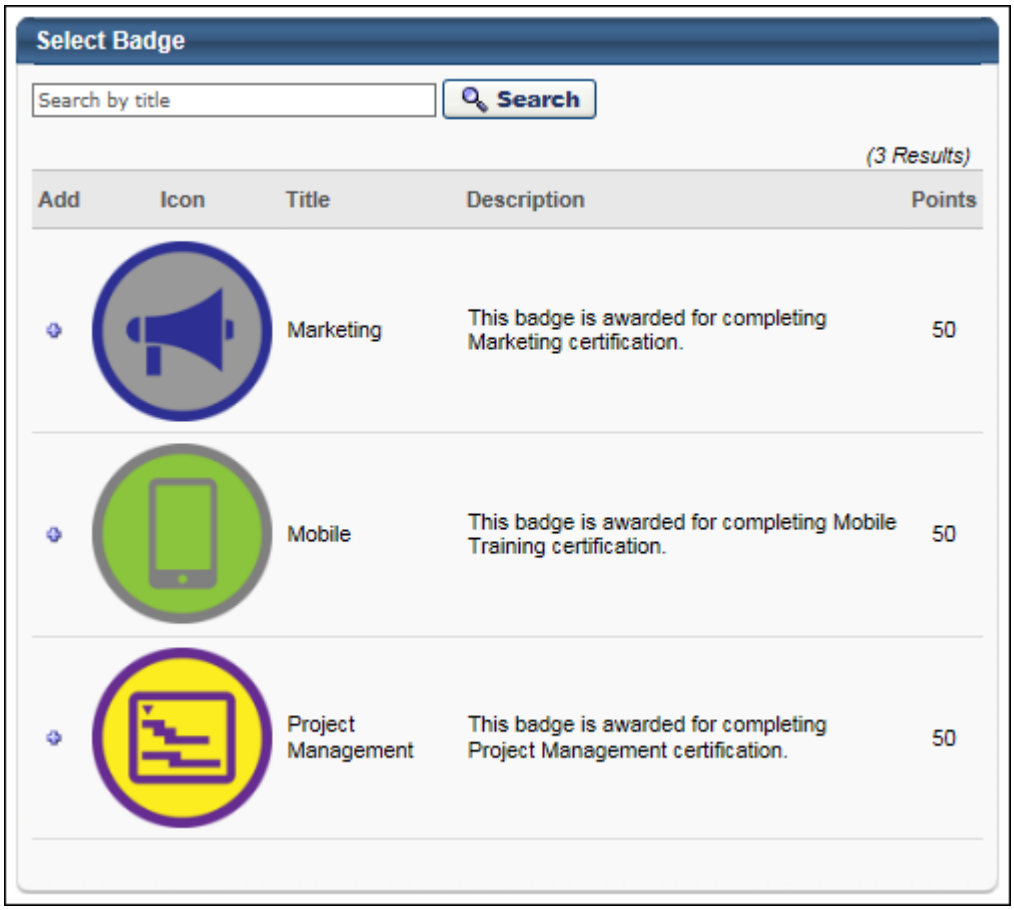
- Points - This field enables administrators to assign points to the training, which will be awarded to the user when they complete the training. This is intended to encourage and motivate the user to complete more training and earn more points. Enter the number of points a user will receive when they complete the training. This field accepts whole numbers between 0 and 1,000.
  - For LOs that are comprised of other LOs, such as curricula, libraries, and programs, the user receives points for the larger LO (e.g., curricula, library) and any LOs that the user completed within the structure of the larger LO.
  - For tests, points are only awarded if the user passes the test.
  - When editing a program, the new points are only applied to cohorts that are created after the changes are made.
  - ***Note:*** *The user is not awarded a badge or points for a LO if the user completes an equivalent LO, is marked Exempt, is granted an exception, or is proxy enrolled in a Completed status.*
- Badge - This field enables administrators to assign a Learning badge to the training, which will be awarded to the user when they complete the training. This is intended to encourage and motivate the user to complete more training and earn more badges. Click the **Add Badge** link to select one of the Learning badges. Within the Select Badge pop-up, administrators can search for badges by title and description. Only active

Learning badges that are available to the administrator can be selected, and badges must be configured via Badge & Point Preferences before they are available to be selected. *See* **Badge & Point Preferences - Badges** on page 312 *for additional information.*

- Once the badge is selected, it appears below the **Add Badge** link. To disassociate the selected badge from the LO, click the Remove icon to the right of the badge.
- For tests, badges are only awarded if the user passes the test.
- When editing a program, the new badge is only applied to cohorts that are created after the changes are made.
- ***Note:*** *The user is not awarded a badge or points for a LO if the user completes an equivalent LO, is marked Exempt, is granted an exception, or is proxy enrolled in a Completed status.*

Both fields can be edited when batch editing LOs via the Course Catalog.





LO Details - Points and Badges

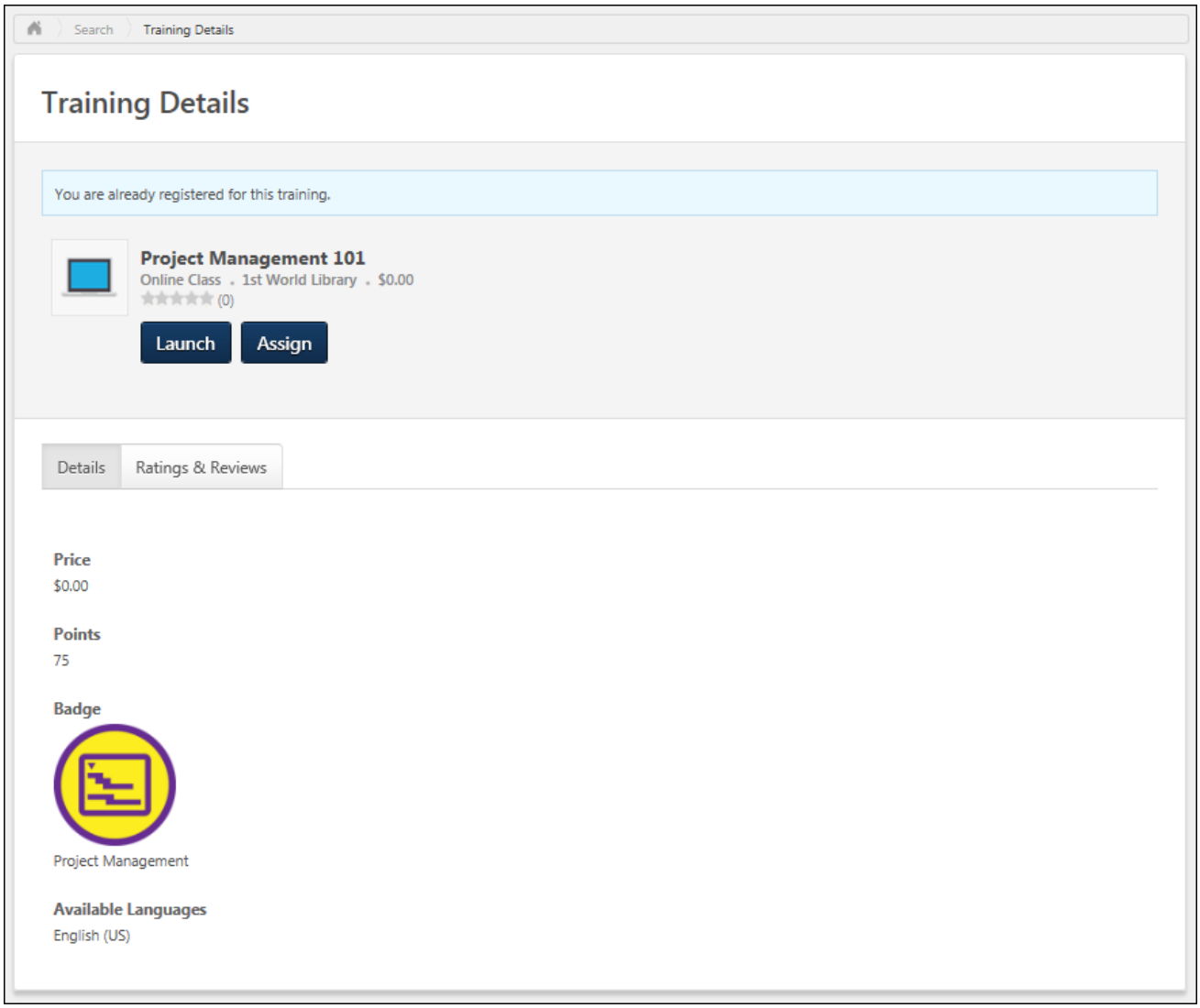
With this enhancement, administrators can now associate a badge with a learning object (LO) via the Course Catalog. Administrators can also set the number of points the user will receive by completing the training.

The following additional fields may now be available on the Details tab of the LO Details page:

- Points - This displays the total number of points the user will receive by completing the LO. If the LO has an associated badge, then this includes the points associated with the LO and the LO's badge. If there are no points associated with the LO, then this field is hidden. Also, this field is only visible if the user has permission to view Learning Points.
- Badge - This displays the badge associated with the LO. If there is no badge associated with the LO, then this field is hidden. Also, this field is only visible if the user has permission to view Learning Badges.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Badge - View	Grants ability to view the Badge field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Learning Points - View	Grants ability to view the Points field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning


Search
Training Details
Training Details
You are already registered for this training.
Project Management 101
Online Class . 1st World Library . $0.00
(0)
Launch
Assign
Details
Ratings & Reviews
Price
$0.00
Points
75
Badge
Project Management
Available Languages
English (US)

Training Completion Page - Points and Badges

With this enhancement, administrators can now associate a badge with a learning object (LO) via the Course Catalog. Administrators can also set the number of points the user will receive by completing the training.

With the April 2016 release, a new Course Completion page is now available.

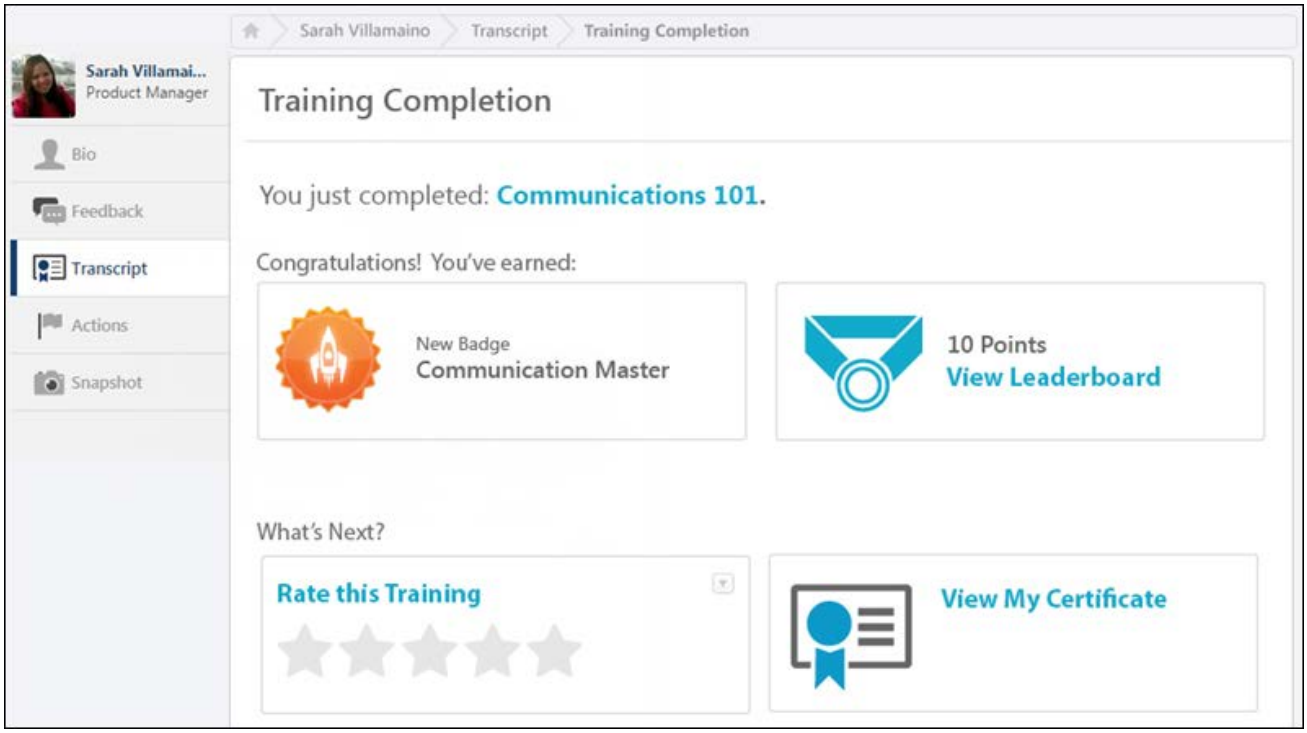
The following additional information may now be displayed on the Course Completion page:

- Badge - If the user is awarded a new badge by completing the training, then this badge is displayed. If the user has the Snapshot - Badges permission, the user can click the badge title to view the Snapshot - My Badges page. *See* **Snapshot - My Badges** on page 329 *for additional information.*
  - If there is no badge associated with the LO, then this information is hidden. Also, this information is only visible if the user has permission to view Learning Badges.
- Points - If the user earned points by completing the training, then the number of points that were earned is displayed. If the user has the Snapshot - Leaderboard permission, the user can click the **View Leaderboard** link to view the Snapshot - Leaderboard page. *See* **Snapshot - Leaderboard** on page 331 *for additional information.*
  - If no points were earned, then this information is hidden. Also, this information is only visible if the user has permission to view Learning Points.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Badge - View	Grants ability to view the Badge field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Learning Points - View	Grants ability to view the Points field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Snapshot - Badges	Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and*	Universal Profile

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



Snapshot - Badges and Leaderboard Widgets

With this enhancement, a Badges and Leaderboard widget can be enabled for the Snapshot page.

To access the Snapshot page, go to HOME > UNIVERSAL PROFILE. Then, click the Snapshot tab.

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

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
Snapshot - Badges	Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Snapshot - Leaderboard	Enables user to view the Leaderboard widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager,	Universal Profile

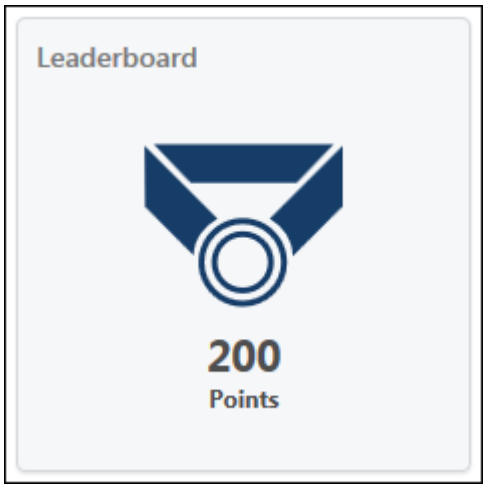
	User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Leaderboard widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	
Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

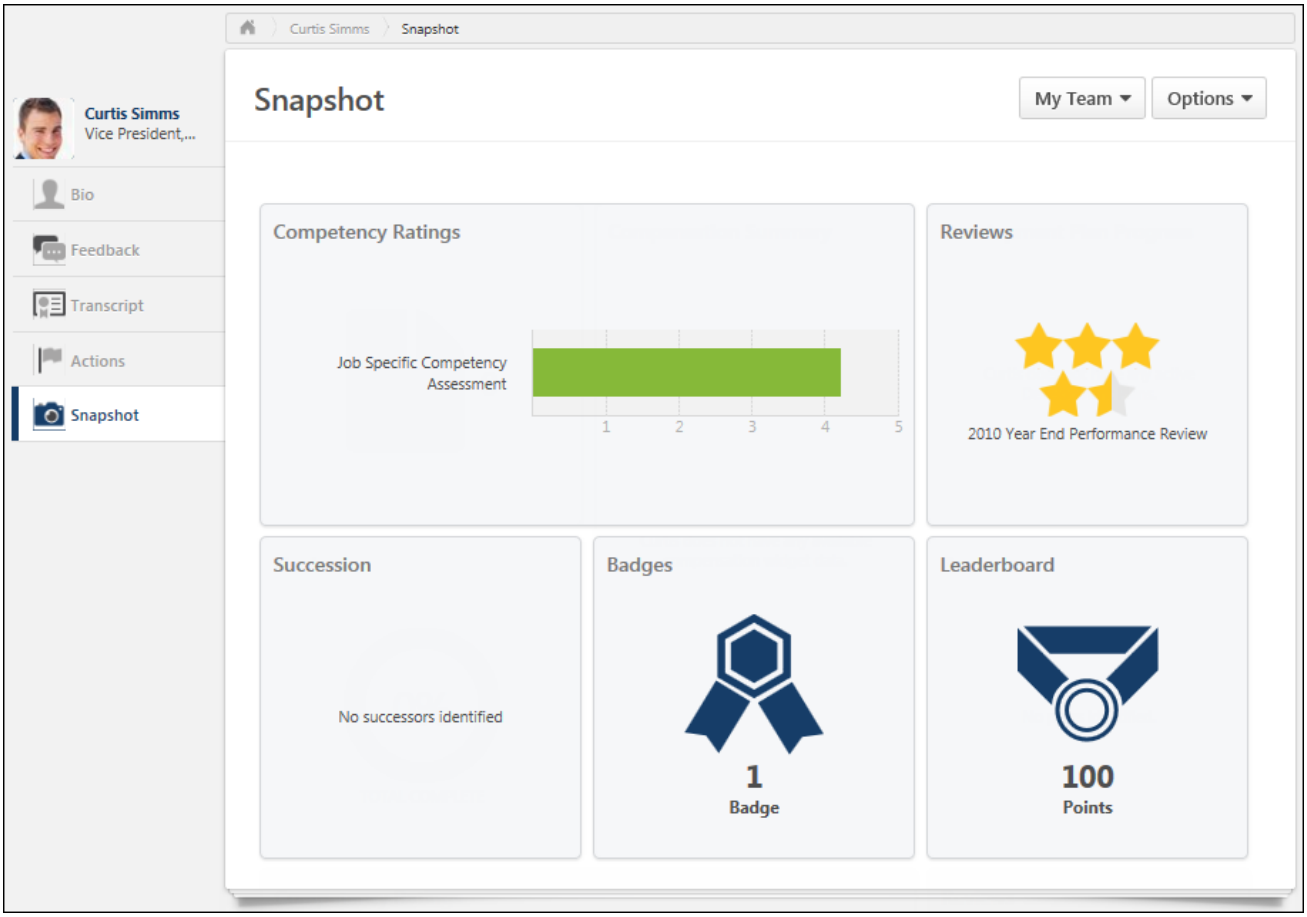
Badges

This widget is only available when enabled by the administrator in Snapshot General Preferences. Also, this widget is only available to users who have the Snapshot - Badges permission. This widget displays the number of badges the user has been awarded. This includes all types of badges (e.g., Feedback and Learning). Click the widget to open the user's My Badges page. *See* **Snapshot - My Badges** on page 329 *for additional information.*

Leaderboard

This widget is only available when enabled by the administrator in Snapshot General Preferences. Also, this widget is only available to users who have the Snapshot - Leaderboard permission. This widget displays the number of points the user has been awarded from completing training, receiving training badges, and receiving positive feedback badges. Click the widget to view a full leaderboard of users and their point totals. *See* **Snapshot - Leaderboard** on page 331 *for additional information.*


Leaderboard
200
Points


Curtis Simms
Snapshot
Snapshot
My Team
Options
Curtis Simms
Vice President,...
Bio
Feedback
Transcript
Actions
Snapshot
Competency Ratings
Job Specific Competency Assessment
1
2
3
4
5
Reviews
2010 Year End Performance Review
Succession
No successors identified
Badges
1
Badge
Leaderboard
100
Points

Snapshot - My Badges

The My Badges page enables users, managers, and administrators to view all of the badges that the user has been awarded. This page displays all types of badges such as Feedback and Learning badges. This page can be filtered by badge type.

To access the My Badges page, click the Badges widget on the Universal Profile - Snapshot page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot - Badges	Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

My Team

The My Team drop-down is designed to allow managers, approvers, and custom relationships to quickly navigate between direct reports and dotted-line reports. When enabled, the My Team drop-down is available to managers and dotted line managers on all pages of their Universal Profile and the Universal Profile of their direct, indirect, and dotted line reports. This drop-down displays the manager's reports visually. Managers of large teams are able to search for a report from within the drop-down. If the user serves in multiple roles that are available within the drop-down, then the user can select a specific role and view the reports that are associated with that role. When the manager selects a report from the My Team drop-down menu, the manager is directed to a consistent page

within Universal Profile. For example, if a report is selected when viewing the Transcript page, the manager is directed to the Transcript page of the selected report. The My Team drop-down enables managers to more effectively manage their teams from within Universal Profile. *See Universal Profile - My Team Drop-down for additional information.*

Filter Badges

By default, all types of badges are displayed. To filter the badges by type, select the appropriate badge type from the drop-down menu, such as Feedback or Learning.

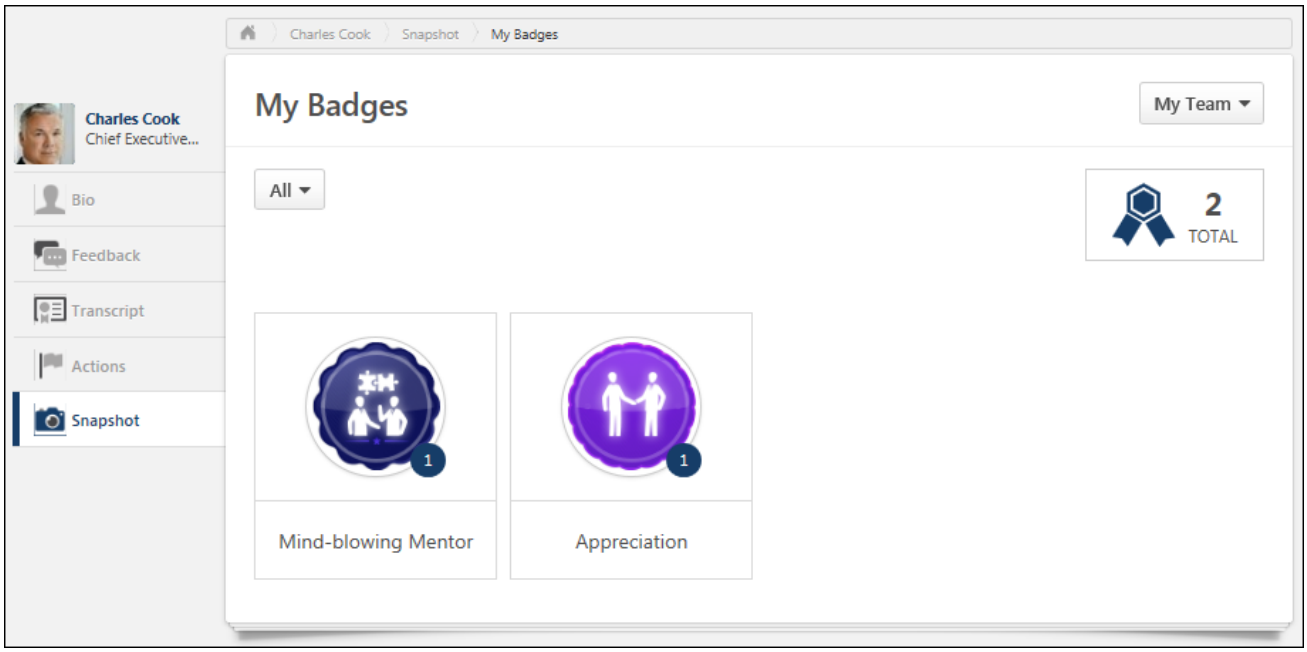
Total Number of Badges

In the upper-right corner of the page, the total number of times a user has been awarded a badge is displayed. If the user has been awarded the same badge multiple times, then each time is counted as a separate occurrence in this total.

Earned Badges

This page displays all of the badges the user has been awarded. A number is displayed in the lower-right corner of the badge which indicates the number of times the user has received this badge.

This page displays all types of badges such as Feedback and Learning badges. Badges are displayed in the order in which they were awarded, with the most recently awarded badge displayed first.



Snapshot - Leaderboard

A user may receive points for completing training. Also, a user may be awarded a badge by completing training or receiving positive feedback from another user. When a user receives a badge, they are also awarded any points that are associated with the badge.

The Leaderboard page enables users to view their total number of points, their overall points ranking within their organizational unit, and the top 10 users who have the most points. Also, if the user is not in the top 10 ranking, then the user is displayed at the bottom of the page with the user who ranks above them and the user who ranks below them.

This page can be filtered by organizational unit (OU) and by time frame.

To access the Leaderboard page, click the Leaderboard widget on the Universal Profile - Snapshot page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot - Leaderboard	Enables user to view the Leaderboard widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Leaderboard widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

My Team

The My Team drop-down is designed to allow managers, approvers, and custom relationships to quickly navigate between direct reports and dotted-line reports. When enabled, the My Team drop-down is available to managers and dotted line managers on all pages of their Universal Profile and the Universal Profile of their direct, indirect, and dotted

line reports. This drop-down displays the manager's reports visually. Managers of large teams are able to search for a report from within the drop-down. If the user serves in multiple roles that are available within the drop-down, then the user can select a specific role and view the reports that are associated with that role. When the manager selects a report from the My Team drop-down menu, the manager is directed to a consistent page within Universal Profile. For example, if a report is selected when viewing the Transcript page, the manager is directed to the Transcript page of the selected report. The My Team drop-down enables managers to more effectively manage their teams from within Universal Profile. *See Universal Profile - My Team Drop-down for additional information.*

Filter by User's OUs

By default, the Leaderboard includes all users within the user's division. However, the user can also filter the Leaderboard by their Position, Location, or custom OU type. This enables the user to see how they rank within each of these OUs. ***Note:*** *Only the user's OUs are available in the drop-down. The user cannot select an OU to which they do not belong. Also, the administrator can configure which filter options are available.*

To filter the Leaderboard by a particular OU, select the appropriate OU type from the drop-down menu.

Filter by Time

By default, the Leaderboard includes points that have been awarded within the calendar month. For example, on April 15, this only includes points that have been awarded from April 1 through April 15. However, the user can filter the Leaderboard by calendar year or include all historical points. This enables the user to see how they rank over different periods of time. ***Note:*** *The time filter follows UTC (Coordinated Universal Time).*

To filter the Leaderboard by a particular time frame, select the appropriate option from the drop-down menu.

Overall Points and Rank

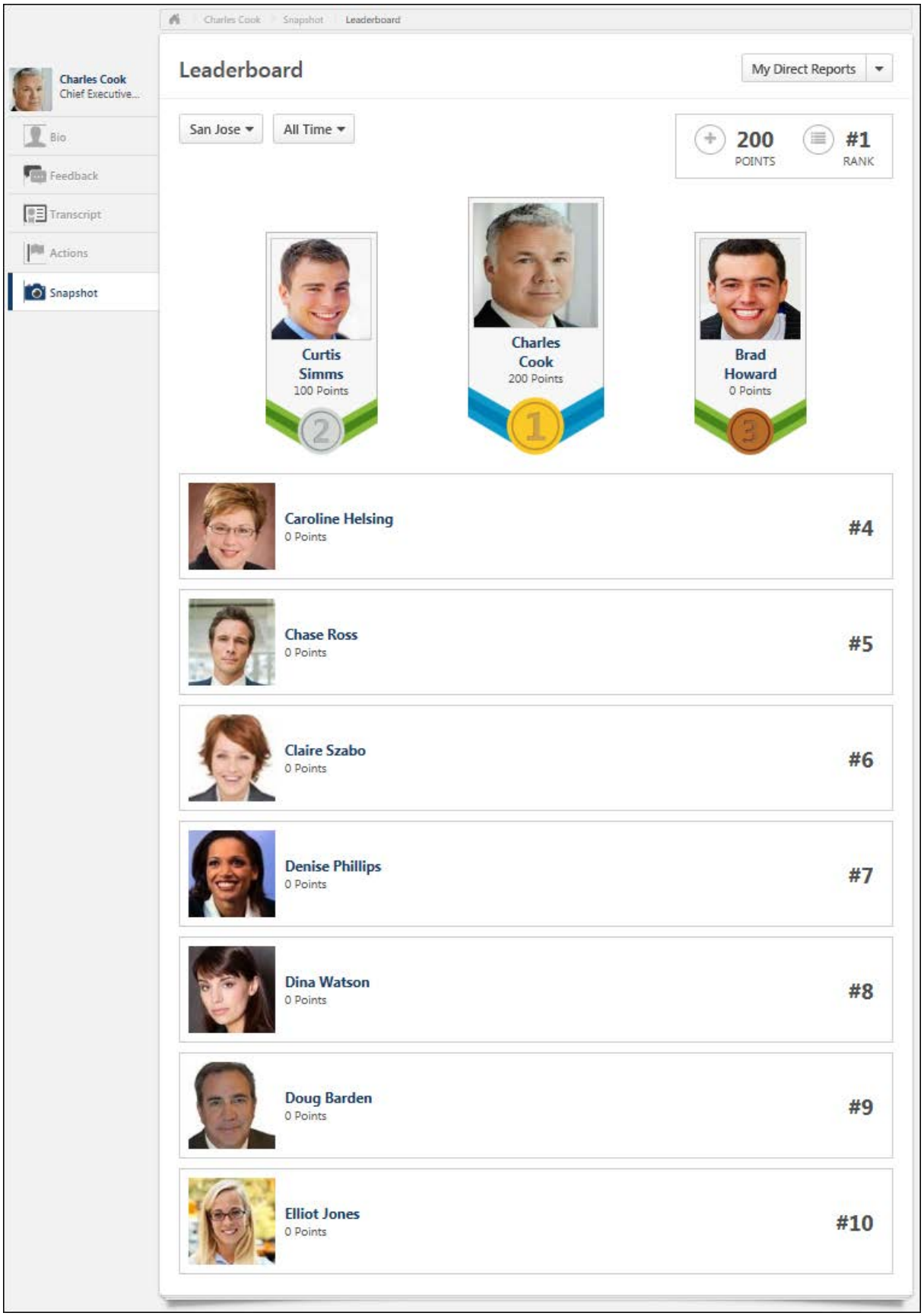
In the upper-right corner of the page, the user's total number of points and their overall ranking is displayed based on the selected time and OU filter.

Top 10 Ranking

The top 10 users who have the most amount of points are displayed based on the selected time and OU filter. Also, the top three users are displayed more prominently at the top of the list.

The user whose Snapshot is being viewed is always displayed in the Leaderboard. If the user is not in the top 10 ranking, then the user is displayed below the top 10 with the user who ranks above them and the user who ranks below them.

Users can click another user's photo or name within the Leaderboard to view the user's Universal Profile: Bio page.


Charles Cook
Snapshot
Leaderboard
Charles Cook
Chief Executive...
Bio
Feedback
Transcript
Actions
Snapshot
Leaderboard
My Direct Reports
San Jose
All Time
200
POINTS
#1
RANK
Curtis Simms
100 Points
2
Charles Cook
200 Points
1
Brad Howard
0 Points
3
Caroline Helsing
0 Points
#4
Chase Ross
0 Points
#5
Claire Szabo
0 Points
#6
Denise Phillips
0 Points
#7
Dina Watson
0 Points
#8
Doug Barden
0 Points
#9
Elliot Jones
0 Points
#10

Universal Profile - Feedback

With this enhancement, badges can now be awarded automatically when a user completes training.

When giving badges via the Universal Profile - Feedback page, users can only give active Feedback badges. Learning badges are not available to be selected on the Feedback page.

Offline Player Enhancements

Offline Player Enhancements

With this enhancement, the new version of Offline Player is more engaging and aligned with Cornerstone's new interface. Organizations can brand the Offline Player application with their logo and color theme. The offline transcript will look similar to the online transcript. Learning progress will be synced automatically.

The new version of the Offline Player includes Windows 10 support.

Use Cases

Andrew is the IT Manager at ABC Corporation. The company wants to brand the Offline Player and make it more engaging to end users. Andrew uses the Branding Configuration application and defines the company logo and color theme. When the configuration is done, Andrew distributes the Offline Player application to end users.

Michelle is a sales person at ABC Corporation. Every day, she takes the subway to get to work. Michelle wants to take training during this time. In the office, she accesses the Offline Player and downloads a course that she wants to complete offline. On the subway, she accesses the Offline Player, launches the course, and completes it. While in the office, Michelle accesses the Offline Player and sees that the application is synching her offline learning to the online portal.

Considerations

Versioning and course updates are not supported by the Offline Player.

Implementation

Upon release, this functionality is available to organizations that have purchased Offline Player. To get the new version of Offline Player, contact Cornerstone through a Global Product Support (GPS) case.

To purchase Offline Player, contact Sales or your Client Executive.

Prior to upgrading to the new version of the Offline Player, all of the existing data must be synched to the online portal.

To upgrade to the new version of the Offline Player, remove the existing application from the machine and install the new version provided by GPS.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offline Content	Grants ability to download and complete training items offline via a mobile device or the new Offline Player. This permission cannot be constrained. This is an end user permission.	Mobile

Offline Learning Branding

With this enhancement, a new Branding application is available for the Offline Player.

The Offline Learning Branding application enables organizations to brand the Offline Player to match their organization's branding. The Branding application enables administrators to configure the application logo, theme color, login method, and window title.

The Branding application is included in the Offline Player installation folder.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offline Content	Grants ability to download and complete training items offline via a mobile device or the new Offline Player. This permission cannot be constrained. This is an end user permission.	Mobile

Branding Options

The following options are available within the Branding application:

- Logo - This option determines the logo image that is displayed within the Offline Player. Only .png files can be used for the logo image. The Cornerstone logo is used by default.
- Theme Color - This option determines the main color for the Offline Player. The theme color is used as the main color on the Login page, the button color, and the titles on the Transcript page. To select a theme color, click the **SELECT COLOR** button. Then, select one of the basic colors, or click the **DEFINE CUSTOM COLORS** button to specify the hex color code for a specific color. Once a color is selected, it is displayed in the field to the right of this field.
- Login Method - Using the radio buttons, select which login methods are available to users. The following options are available:
  - Sign in with portal credentials - When this option is selected, only the Sign In option is available to users on the Login page.
  - Log in with PIN - When this option is selected, only the Log In with Pin option is available to users on the Login page.
  - Enable both options - When this option is selected, both login options are available to users on the Login page.
- Window Title - Enter the text that should appear at the top of the Offline Player window. The default value is Offline Learning.

Save Changes

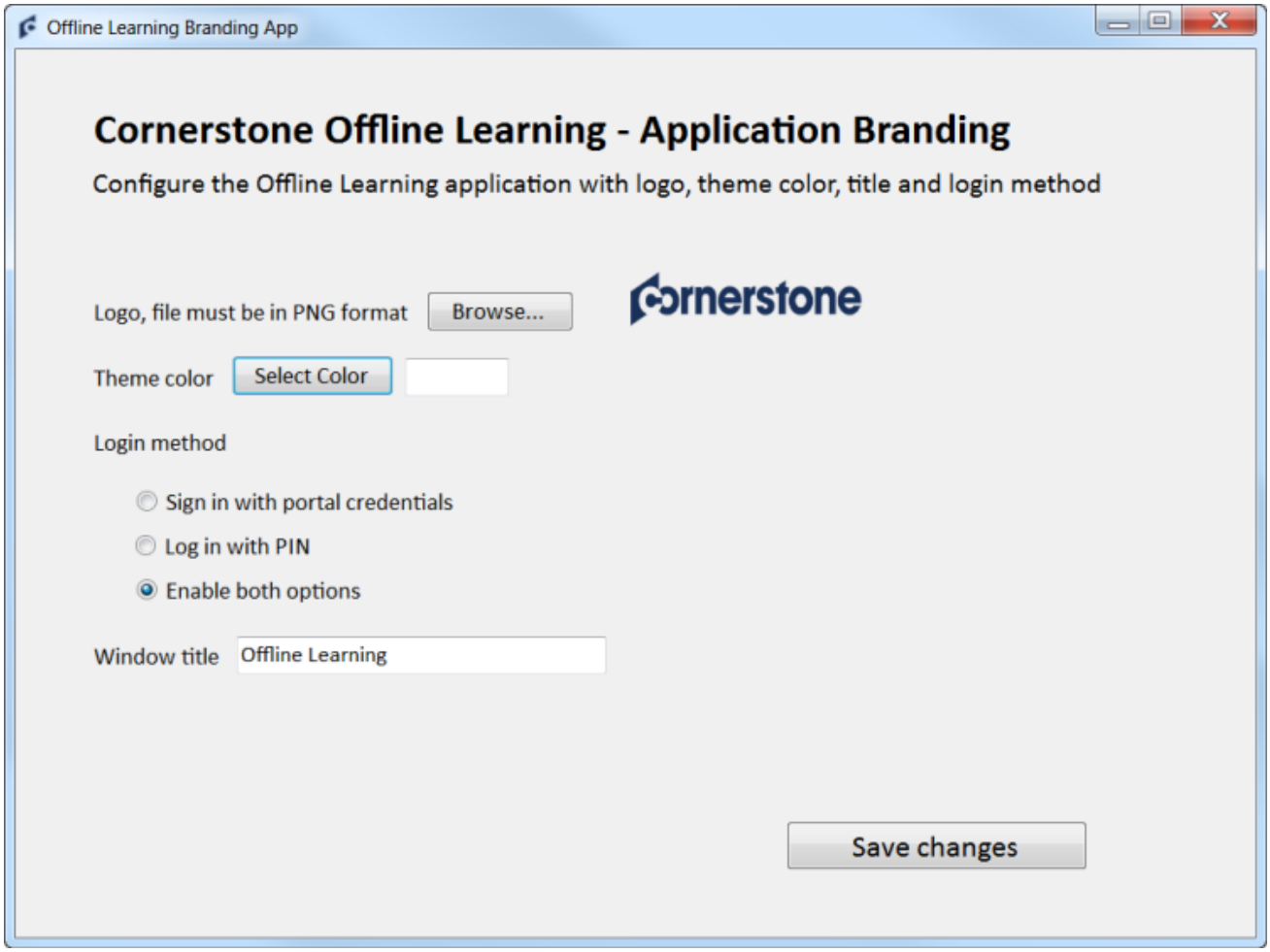
Click this button to save any changes to the branding settings. The changes will be reflected in the Offline Player the next time the application is launched.

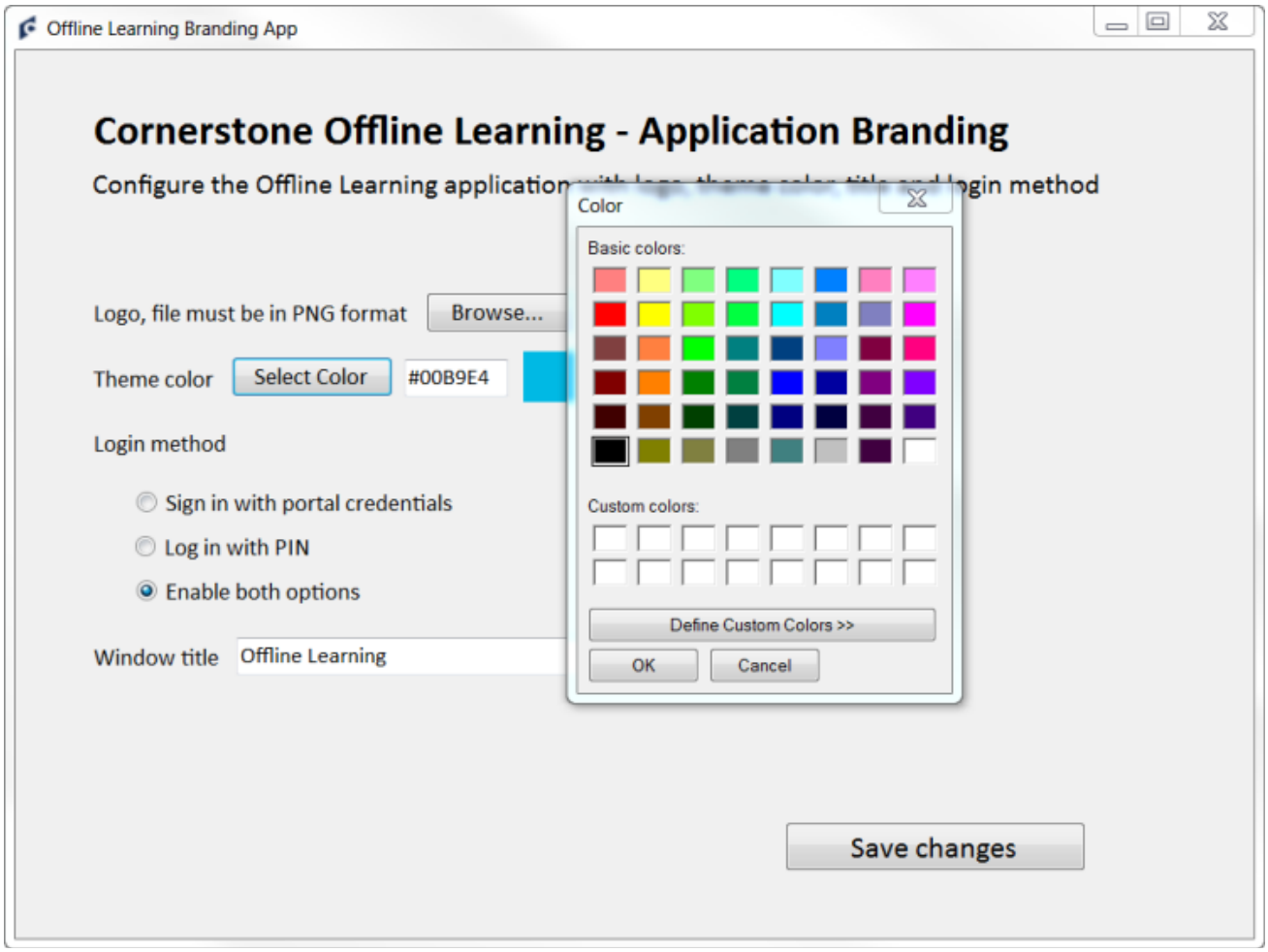
Troubleshooting

In order to use the Branding application, administrators must have read and write access to the following files on the computer on which the Offline Player is being installed:

- \PlayerSettings.ini
- www\resources\images\csod_logo.png

It is advised that administrators remove the Read-only attribute for these files.




Offline Learning Branding App
Cornerstone Offline Learning - Application Branding
Configure the Offline Learning application
login method
Logo, file must be in PNG format
Browse...
Theme color
Select Color
#00B9E4
Login method
Sign in with portal credentials
Log in with PIN
Enable both options
Window title
Offline Learning
Color
Basic colors:
Custom colors:
Define Custom Colors >>
OK
Cancel
Save changes

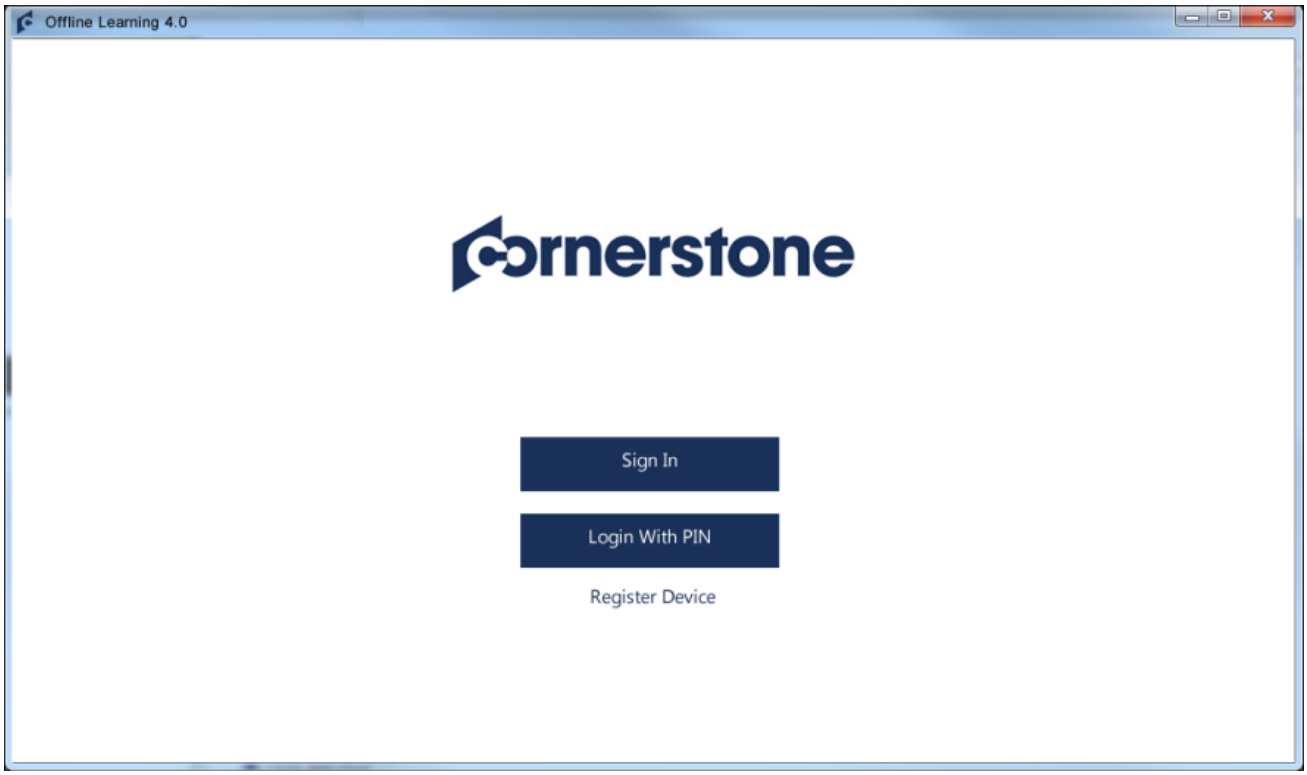
Offline Player Log In Redesign

With this enhancement, the login pages are redesigned. The application title is changed from "Offline Player" to "Offline Learning." The functionality on these pages is unchanged.

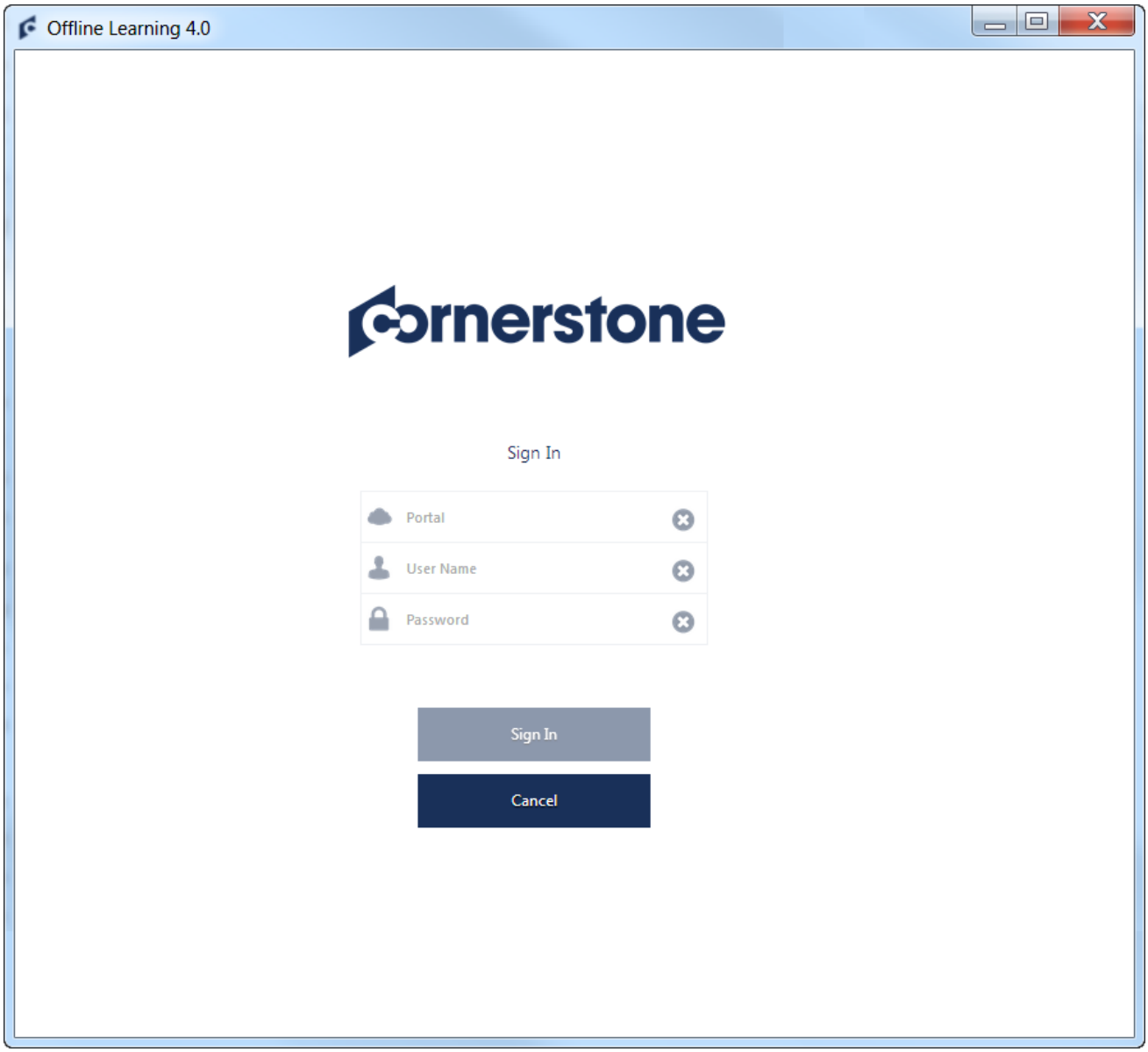
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offline Content	Grants ability to download and complete training items offline via a mobile device or the new Offline Player. This permission cannot be constrained. This is an end user permission.	Mobile

Login Page



Sign In Page


Offline Learning 4.0
Cornerstone
Sign In
Portal
User Name
Password
Sign In
Cancel

Offline Player Transcript Redesign

With this enhancement, the Offline Transcript page is redesigned to match the Transcript functionality within the online system.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offline Content	Grants ability to download and complete training items offline via a mobile device or the new Offline Player. This permission cannot be constrained. This is an end user permission.	Mobile

The following changes have been made to the Transcript page:

- Status Filter - A new filter is now available which enables users to filter their courses by status. The following filter options are available:
  - Active - This option is selected by default. This option displays courses that are not yet completed.
  - Completed - This option displays only completed courses.
- Refresh List - This button is removed.
- Sync All - This button initiates a synchronization with the online system. *See* **Offline Player Synchronization** on page 345 *for additional information.*
- Search for Training - Users can now search for courses within their Transcript. The search functionality only searches within the selected Status. For example, if the Completed status is selected, then the search functionality only searches within Completed LOs.
- Transcript Item Details - The following information is displayed for each item in the Transcript:
  - Color Strip - The left edge of the LO is color coded to represent the proximity to the due date of the LO. For example, if the LO due date is past due, then the color strip is red to indicate that LO is due immediately. If a LO due date is not eminent, then the color strip is green to indicate that LO is not due immediately. *See the Color Strip Key section below for additional information.*
  - LO icon - The icon that is displayed corresponds with the LO type (e.g., online course).
  - LO title - The LO title is displayed to the right of the LO icon.
  - LO Due Date or Completion Date - For training that is active, the LO due date is displayed, if available. For training that is completed, the LO completion date is displayed.
  - Status - The LO status is displayed.
- Status - The Status column is removed, and the LO status is now displayed below the LO title.
- Actions - The Actions drop-down is removed. Only one action is available for each LO. The following actions may be available:
  - Download - This action is available when the course has not been downloaded to the local computer.

- Launch - This action is available when the course has been downloaded to the local computer.
    - When the course is locked or completed, the Launch button is disabled and no action is available.

Statuses

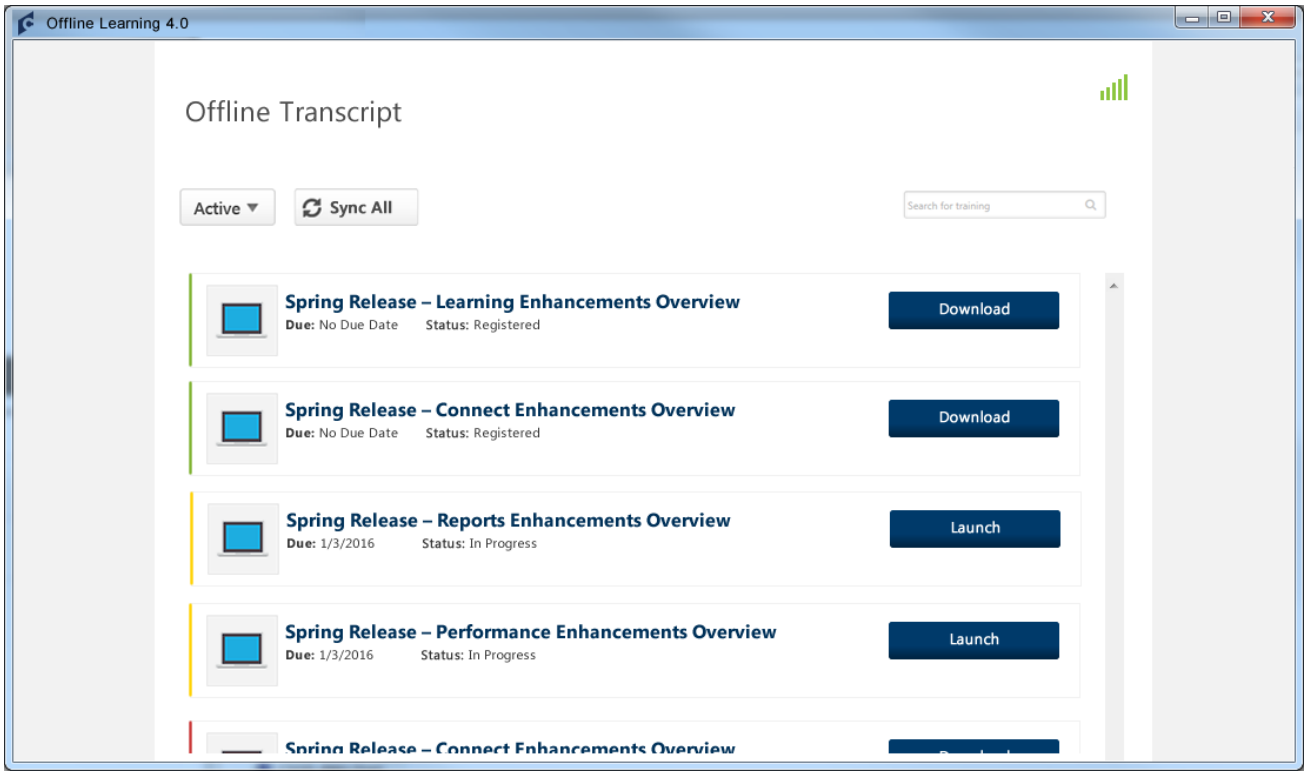
The statuses within the Offline Player are updated.

- Downloaded - This status is removed. Courses that were previously in this status now display the status from their online Transcript.
- Unsynced - This status is renamed. The new status name is Waiting for Sync.
- Synced - This status is removed. Courses that were previously in this status now display the status from their online Transcript.
- Available to Download - This status is removed. Courses that were previously in this status now display the status from their online Transcript.
- Locked - This status is unchanged.
- Unlocked from Web - This status is removed. Courses that were previously in this status now display the status from their online Transcript.

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Orange - Due within the next seven days, not including today
- Green - Due after seven days


Offline Learning 4.0
Offline Transcript
Active
Sync All
Search for training
Spring Release – Learning Enhancements Overview
Due: No Due Date
Status: Registered
Download
Spring Release – Connect Enhancements Overview
Due: No Due Date
Status: Registered
Download
Spring Release – Reports Enhancements Overview
Due: 1/3/2016
Status: In Progress
Launch
Spring Release – Performance Enhancements Overview
Due: 1/3/2016
Status: In Progress
Launch

Offline Player Synchronization

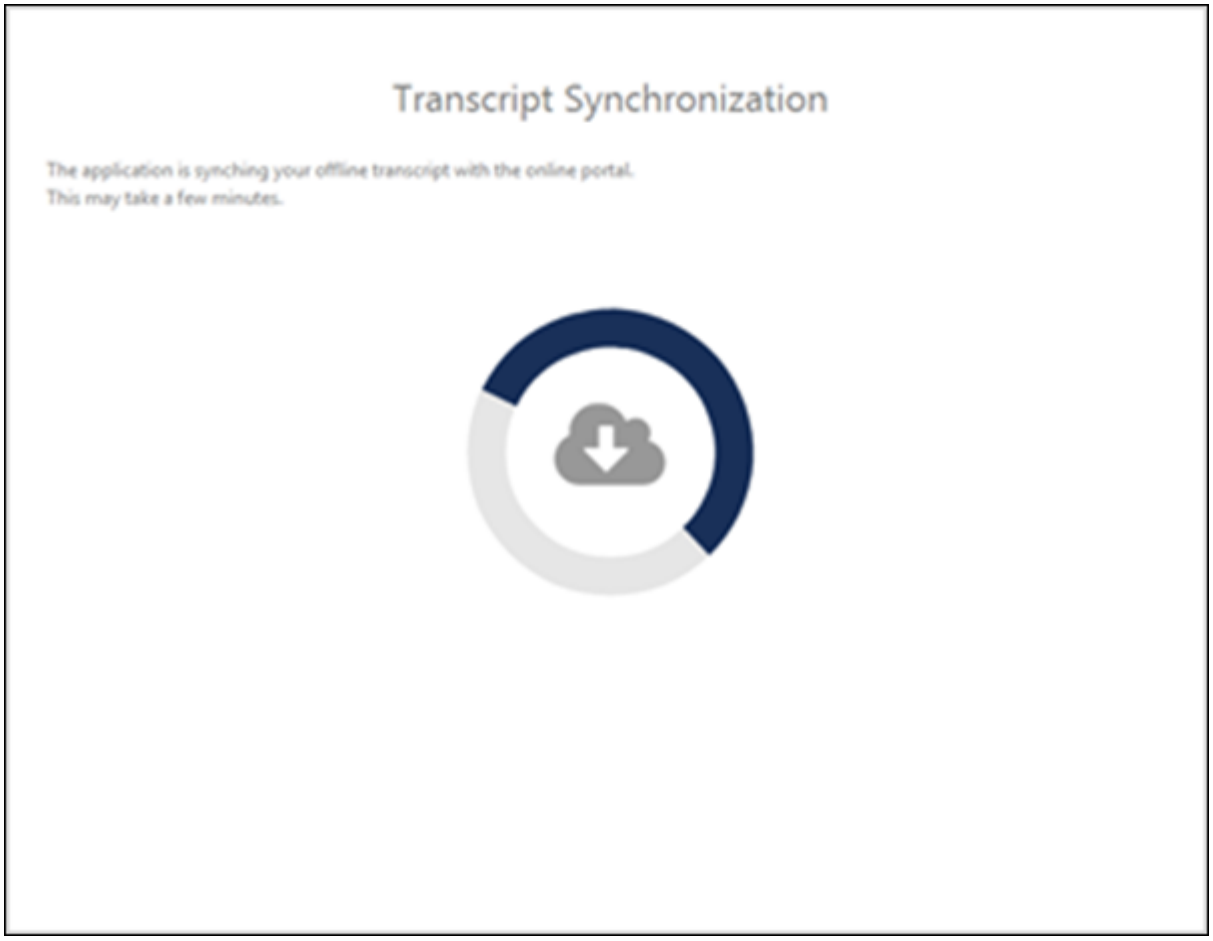
With this enhancement, the system now automatically syncs the user's progress to the online portal when the user logs in to the Offline Player and when the user exits a course if Internet connectivity is available. Users are also able to initiate a synchronization by selecting the **SYNC ALL** button from their Transcript page.

When the synchronization is occurring, the Offline Player displays the Transcript Synchronization screen to indicate that the Offline Player is synching with the online system.

If the synchronization fails, the Offline Player will attempt to sync with the online system the next time the user logs in to the Offline Player or exits a course.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offline Content	Grants ability to download and complete training items offline via a mobile device or the new Offline Player. This permission cannot be constrained. This is an end user permission.	Mobile



Offline Player Windows 10 Support

With this enhancement, the Offline Player can now be used with the Windows 10 operating system.

Tin Can (xAPI) Support - Learning Record Store (LRS)

Tin Can is a new eLearning protocol that enables recording of a wide range of learning experiences, including native mobile applications and team-based e-learning.

With this enhancement, the system is able to record external Tin Can activities on Cornerstone's Learning Record Store (LRS). External Tin Can activities include but are not limited to mobile apps, offline learning, web application, collaborative learning, games, videos, etc. When an external activity needs to be recorded, the application sends secure statements to the LRS to record all statements.

With this release, data sent to the LRS is only available on the backend. Availability on a user's Transcript and Reporting will be available at a future release.

Implementation

Organizations must configure their content based on Cornerstone's xAPI integration guidelines. Once content is properly configured, contact Cornerstone through a Global Product Support (GPS) Request Service case to receive an Access Key.

Glossary

- Tin Can (xAPI) - A new eLearning protocol that enables recording of a wide range of learning experiences, including native mobile applications and team-based e-learning.
- Learning Record Store (LRS) - A data system that stores xAPI learning records.
- Statement - This term relates to Tin Can (xAPI). A statement is a simple construct to track an aspect of a learning experience. A set of several statements may be used to track complete details about a learning experience. A statement consists of the following: <actor (learner)> <verb> <object>, with <result>, in <context>

Training Completion

Training Completion Overview

Prior to this enhancement, upon completing training, users were returned to their Transcript with no confirmation that the training was completed. Post-completion workflows, such as printing a Completion certification or rating the training, were difficult to locate and required users to follow a multi-step process, which often resulted in users not being able to complete these actions.

With this enhancement, a Training Completion page can now be enabled for training. A Training Completion page is a page that is available to a user when they complete the training. Depending on the configuration of the training and the portal, the Training Completion page may display any points or badges that were awarded, the opportunity to rate and review the training, and the option to view their certificate of completion.

Administrators can configure the following aspects of the Training Completion page:

- Completion message
- Training badges
- Training points
- Ability to rate and review the training
- Training completion certificate

Administrators can enable or disable the Training Completion page by training type and for each individual learning object (LO). Administrators can configure a default completion message for all training. Also, administrators can create a custom completion message for individual LOs.

Use Cases

Michelle is a new Account Manager at Express Shop. To stay up to date on the state of the company and new products, Michelle engages in several training offerings throughout the year. These trainings ensure that she is certified to evangelize the company's products to prospects and improve her skills as an Account Manager.

Upon completing a training that certifies her to talk about the products, she is immediately be redirected to a training completion page that recaps her accomplishments. Beyond confirming the training is complete, Michelle can view the badges and points she has earned. She can also easily view and print her new certificate to put up for display at her desk.

After reviewing her accomplishments, she is presented with an opportunity to rate and review the training that she has just taken so she can provide feedback for others who may consume this training while it is still fresh in her mind.

These features offer Michelle gratification for completing her training, keep her engaged, and encourage her to continue her professional growth and development.

Considerations

If all content is disabled on the Training Completion page and the Training Completion Message is blank for the LO, then a default message is displayed on the Training Completion page to prevent a blank page from being displayed.

This functionality is only available to organizations using the redesigned Transcript.

Training Completion Page Availability & Redirection

If a Training Completion page is available for a LO, then users can always manually navigate to the page via the Transcript Details page once the LO is completed. Automatic redirection to the Training Completion page only occurs for select LO types in certain scenarios.

Automatic Redirection

Automatic redirection only applies to the following LO types:

- Online Course
- Material
- Test
- Video

Automatic redirection occurs for the specified LO types in the following scenarios:

- User completes the LO (see exceptions below)
- User marks the LO Complete from their Transcript
- User marks the LO Complete from their Action Items
- User completes a recurrence of the LO
- User completes another version of the LO
- Test Only: The test is submitted and passed

Automatic redirection does NOT occur for the specified LO types in the following scenarios:

- Admin marks the LO Complete from the Transcript Details Page
- Admin marks the user Exempt from the LO from the Transcript Details page
- User completes the LO as an associated LO in the following scenarios:
    - Prerequisite
    - Pre-work
    - Post-work
    - Within cohort structure
    - Within curriculum structure
    - Within library structure
- LO is a Training Equivalent or Language Equivalent - Only the LO that is completed will redirect
- When a LO is in a pre-completion status due to a required action:
    - Pending Signature
    - Pending Evaluation

    - Pending Acknowledge
    - Pending Post Work
- Upon completing required pre-completion work:
    - Pending Signature
    - Pending Evaluation
    - Pending Acknowledge
    - Pending Post Work
- When completing a LO launched from the following:
    - Welcome Page Widget
    - Deep Link
    - LO DetailsPage - This only applies to Online Courses
- The system is in Low Bandwidth mode - This is controlled by a backend setting.
- Test Only:
    - Test is submitted and failed
    - Test contains free-form questions

Manual Redirection

User's can manually navigate to the Training Completion page from the Transcript Details page for the following LO types:

- Online Course
- Event
- Quick Course
- Curriculum
- Test
- Library
- Materials
- Video
- Cohort

From within the Curriculum Player and Cohort Player, can select the **View Completion Page** option from the **Options** drop down to manually navigate to the Completion Page once the LO is in the Completed status.

Implementation

This functionality is automatically enabled for all organizations using the Learning module.
Note: *This functionality is only available to organizations using the redesigned Transcript.*

By default, the Training Completion Page Preferences permission is only available to the default System Administrator role.

By default, the Training Completion page is disabled for all learning objects. The Training Completion page can be enabled or disabled by default by LO type via the Training Completion Page Preferences. The Training Completion page can be enabled or disabled for individual LOs via the Course Catalog.

Glossary

- Training Completion Page - A page that is available for a user when they complete the training. Depending on the configuration of the training and the portal, the Training Completion page may display any points or badges that were awarded, the opportunity to rate and review the training, and the option to view a certificate of completion.
- Completion Message - A note or message that is displayed on the Training Completion Page that may be presented to users when they complete training. This is intended to inform the user that they have successfully completed the training. This message can also provide the user a directive regarding next steps, such as how to rate the course or print a certificate of completion.

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Badge - View	Grants ability to view the Badge field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Learning Points - View	Grants ability to view the Points field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Snapshot - Leaderboard	Enables user to view the Leaderboard widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Leaderboard widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Training Completion Page Preferences - Manage	Grants ability to access and edit the Training Completion Page Preferences where the administrator can configure the default behavior for training completion pages, including whether a completion page is enabled by default for each	Learning - Administration

	learning object (LO) type and the default completion message that appears on the Training Completion page. This permission cannot be constrained. This is an administrator permission.	

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 Reviews and Ratings Preference - Manage	Grants ability to configure course reviews and ratings functionality by division. This is an administrator permission.	eCommerce - Administration
Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

Training Completion Page Preferences

With this enhancement, administrators now have the ability to enable a Completion page, which will be available for a user once they have completed the training.

The Training Completion Page Preferences page enables administrators to configure the default behavior for training completion pages, including whether a completion page is enabled by default for each learning object (LO) type and the default completion message that appears on the Training Completion page.

To manage Training Completion Page Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > TRAINING COMPLETION PAGE.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Completion Page Preferences - Manage	Grants ability to access and edit the Training Completion Page Preferences where the administrator can configure the default behavior for training completion pages, including whether a completion page is enabled by default for each learning object (LO) type and the default completion message that appears on the Training Completion page. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Settings by Learning Object Type

This section enables administrators to set the default behaviors for each LO type that can be configured in the Course Catalog. The following options can be set for each available LO type:

- **Enable Training Completion Page** - A Training Completion page is a page that is available for a user when they complete the training. Depending on the configuration of the training and the portal, the Training Completion page may display any points or badges that were awarded, the opportunity to rate and review the training, and the option to view their certificate of completion. When this option is selected, the Training Completion page is enabled by default for the corresponding training type. Administrators can choose to enable or disable the Training Completion page for each individual LO via the Course Catalog. This setting only determines the default configuration.

Completion Message

This section enables administrators to configure the default completion message that is displayed to users on the Training Completion page when they complete a LO. When editing a LO via the Course Catalog, administrators can choose to utilize the default

completion message or they can create a custom completion message for the LO. This setting only determines the default completion message.

To view a list of all of the tags that can be used in the default completion message, click the **List of Available Tags** link. To use one of the tags, copy the tag from the pop-up and paste it into the custom message editor. Be sure to copy the brackets on both sides of the tag name.

To edit the default completion message, click the Gear icon in the upper-right corner of the Preview panel. This opens an HTML editor, in which a custom message can be configured using HTML. *See HTML Whitelist.*

The Preview panel displays a preview of the message as it is currently configured. If tags are used in the message, then the tag is displayed with brackets in the preview.

Overwrite Custom Completion Page Settings

Choose whether or not to overwrite custom training completion page settings for all LOs. If you choose to overwrite custom settings for all LOs, the selected settings are applied to both new and existing LOs. Any previously customized LOs are updated with the selected settings.

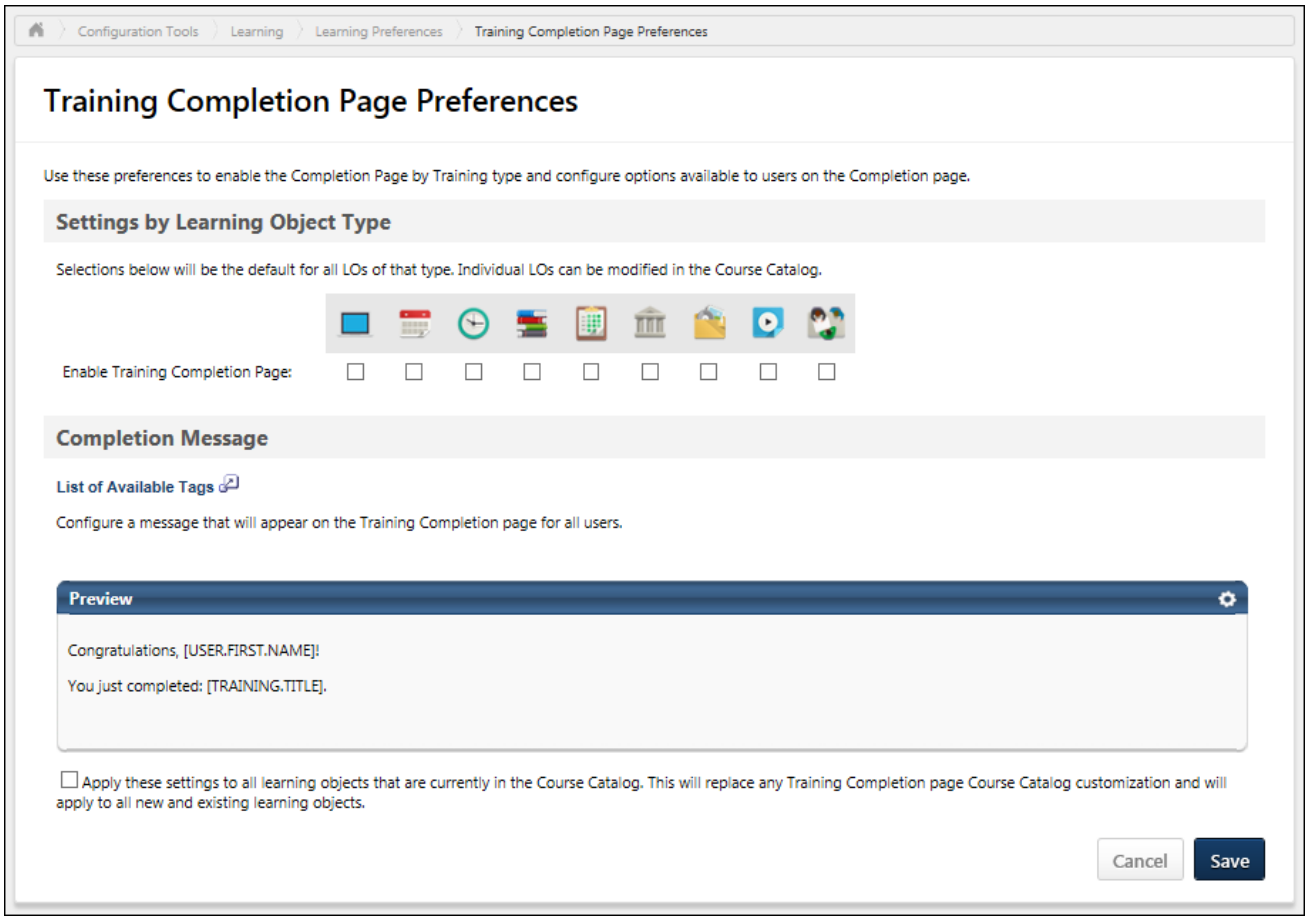
If this option is unselected, then only the LOs that do not have customized settings will be updated, as well as any LOs that are created in the future.

A LO that has not been customized always inherits from the default settings, regardless of whether this option is selected.

A LO is considered customized if its settings have been changed via the Course Catalog.

Save/Cancel

Click **SAVE** to commit any unsaved changes, or click **CANCEL** to discard any unsaved changes.


Configuration Tools
Learning
Learning Preferences
Training Completion Page Preferences
Training Completion Page Preferences
Use these preferences to enable the Completion Page by Training type and configure options available to users on the Completion page.
Settings by Learning Object Type
Selections below will be the default for all LOs of that type. Individual LOs can be modified in the Course Catalog.
Enable Training Completion Page:
Completion Message
List of Available Tags
Configure a message that will appear on the Training Completion page for all users.
Preview
Congratulations, [USER.FIRST.NAME]!
You just completed: [TRAINING.TITLE].
Apply these settings to all learning objects that are currently in the Course Catalog. This will replace any Training Completion page Course Catalog customization and will apply to all new and existing learning objects.
Cancel
Save

Course Catalog - General - Completion Page

With this enhancement, administrators now have the ability to enable a Completion page, which will be displayed to a user once they have completed the training.

To support this enhancement, the General tab of the Course Catalog now has additional options that enable administrators to configure the Completion page for each learning object (LO).

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 Completion Page Preferences - Manage	Grants ability to access and edit the Training Completion Page Preferences where the administrator can configure the default behavior for training completion pages, including whether a completion page is enabled by default for each learning object (LO) type and the default completion message that appears on the Training Completion page. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

The following new options are now available in the General tab of the Course Catalog:

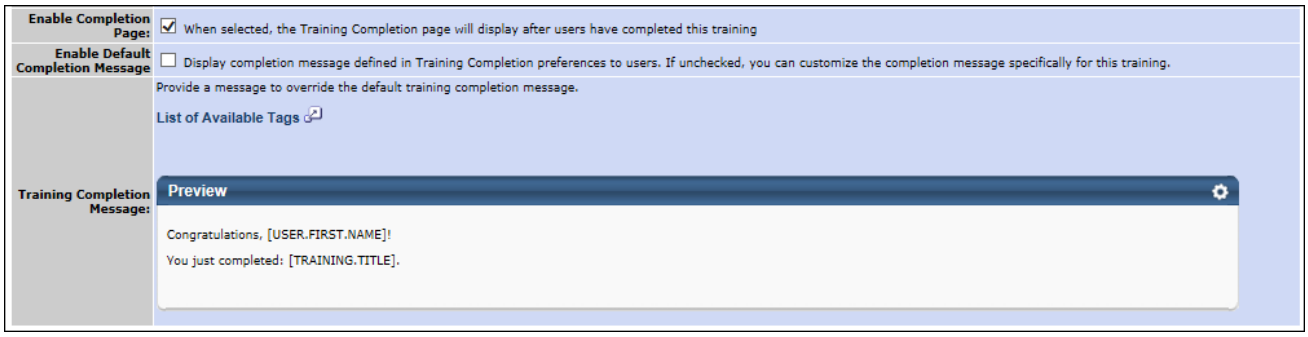
Training Completion Page Settings

A Training Completion page is a page that is available to a user when they complete the training. Depending on the configuration of the training and the portal, the Training Completion page may display any points or badges that were awarded, the opportunity to rate and review the training, and the option to view their certificate of completion.

The following settings enable administrators to configure the Training Completion page for the LO. These settings are only available to administrators who have permission to manage Training Completion Page Preferences.

- **Enable Completion Page** - When this option is selected, the Training Completion page is displayed when the user completes the training. When this option is not selected, the

user does not receive a notification that they have completed the training. The default setting for this option is determined in Training Completion Page Preferences.
  - Use Case: A Training Completion page may be enabled for a LO to encourage users to rate the LO, encourage users to take additional training by displaying their awarded badge and training points, or to enable users to quickly access their certification.
  - Use Case: A Training Completion page may be disabled for a LO if the LO does not have any post-completion workflows, such as Compliance training.
- **Enable Default Completion Message** - This option is only available when the **Enable Completion Page** option is selected. When this option is selected, the Training Completion page displays the default completion message that is defined in Training Completion Page Preferences. When this option is not selected, the **Training Completion Message** field is enabled, which allows the administrator to customize the message that is displayed to users when they complete this LO.
- **Training Completion Message** - This field is only available when the **Enable Default Completion Message** option is not selected, and it is only available to administrators who have permission to manage Training Completion Page Preferences. This field allows the administrator to customize the message that is displayed to users when they complete this LO. This is useful if the LO requires specific completion instructions.
  - The Preview panel displays a preview of the message as it is currently configured. If tags are used in the message, then the tag is displayed with brackets in the preview.
  - To edit the completion message, click the Gear icon in the upper-right corner of the Preview panel. This opens an HTML editor, in which a custom message can be configured using HTML. Administrators can also localize the message within the HTML editor. *See HTML Whitelist.*
  - To view a list of all of the tags that can be used in the custom message, click the **List of Available Tags** link. To use one of the tags, copy the tag from the pop-up and paste it into the custom message editor. Be sure to copy the brackets on both sides of the tag name.
  - ***Note:*** *If all content is disabled on the Training Completion page and the Training Completion Message is blank for the LO, then a default message is displayed on the Training Completion page to prevent a blank page from being displayed.*




Edit Project Management 101
Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.
General
Prerequisites
Subjects
Skills
Competencies
Acknowledger
Approval Wor
Availability
Emails
Recommenda
Pricing
Edit Training
Original Title: 2011 Fall Release - Summarized Reporting Enchancement
Title: Project Management 101
Provider: 1st World Library
Type: Online Class
Version: 1.0
Learning Object Id: a82eadc6-58b5-4b63-b61b-4835a0f394fc
Keywords:
Description:
Thumbnail Image:
Browse...
Upload
For the best quality thumbnail, images of 200x200 pixels and approximately 20KB are recommended.
Resources:
Add Attachment
No attachments have been uploaded for this Online Class
Available Languages:
English (US)
Default Language:
English (US) : This is the language shown to the user if the course is not localized in their language.
Points:
25
Badge:
Add Badge
Project Management
Credits:
0
Max Score:
0
If this value is set to 0 then no score will be displayed on the user's transcript. This field shows the points possible for the course.
Pre-Work:
Add Pre-Work
Post-Work:
Add Post-Work
Target Audience:
Request Form:
Please select a Request Form
Required Completion Approvals:
Place a value in this box greater than 0 to require this number of training completion approvals to all users who complete this training. Upon completion user's status will proceed to Pending Completion Approval before moving to Completed. If this box is blank, the LO will not require completion approval.
Screen Resolution:
Enter pixel values in the width and height boxes to control the window size of this course upon launch. The course will open with the specified size and may not be adjusted by the end user. Leaving the fields blank will allow the window to launch in its standard size.
Width: pixels. Height: pixels.
Recurrence:
When a curriculum active for recurrence is re-requested or re-assigned, the internal learning objects will be reset.
Allow users to request this training more than once.
Allow this training to be assigned to the same user more than once.
Allow subsequent instances of training to be approved based on original approval. Leave unmarked to apply approval workflow for every request.
Available Offline:
Allow download for offline consumption
Allow launch from offline network location
Language Equivalents:
If a training item is available in the user's portal display language, the language equivalent training will be displayed to the user by default. Do not exceed one training item per language.
Add Language Equivalents
Training Equivalence:
User who completes one of the following training items will acquire a completed (equivalent) status for the current training item on transcript.
Add Training Equivalents
Training Purpose:
Indicate the training purposes available for selection in a drop down by the end user:
Knowledge Management
New Course Version
Exclude from Course Recommendations:
When selected, this training will not be recommended to users via Course Recommendations.
Active:
When selected, this training is active
Deactivate this course on
Mobile:
Allow this training to be viewed via the Cornerstone Mobile application/website.
Note: For mobile devices, please ensure no plugins (i.e Flash, Java) are required for the course.
Required Electronic Signature:
Signature Message:
Provide a message to override the default electronic signature message.
Compatibility Mode:
None
Enable Completion Page:
When selected, the Training Completion page will display after users have completed this training
Enable Default Completion Message
Display completion message defined in Training Completion preferences to users. If unchecked, you can customize the completion message specifically for this training.
Cancel
Save
Modification History

Course Ratings Preferences

Prior to this enhancement, when providing a rating for a course, users were always required to provide a review for the course, including a review title and review text.

With this enhancement, a new option is now available, which allows administrators to configure whether or not users are required to provide a review title and review text when rating a course.

To manage Course Ratings Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > COURSE RATINGS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Reviews and Ratings Preference - Manage	Grants ability to configure course reviews and ratings functionality by division. This is an administrator permission.	eCommerce - Administration

The following new option is now available in the General section of the Course Ratings Preferences page:

- **Require Title and Review fields** - This option enables administrators to configure whether or not users are required to provide a review title and review text when rating a course. This option is selected by default.
  - When this option is not selected, users can provide a rating for the course without providing a review.
  - When this option is selected, users are required to provide a review when rating the course, including a review title and review text.

Define Course Rating Preference to allow users post ratings on learning objects.

Course Ratings Preferences

GENERAL

☑	Activate Course Ratings and Reviews Functionality	Allow users to rate and review training items.
☑	Require Title and Review fields	Users are required to complete the title and written review fields when rating a course.

USER PREFERENCE

INCLUDE	PREFERENCE	DESCRIPTION
☑	Display user Photo.	Display user photo next to Course Reviews.
☑	Allow users to rate anonymously.	Allow users to hide real names when they rate courses.
☐	Allow selected users to rate courses:	

VIEW RATINGS PREFERENCE

If left unchecked, user will be able to view ratings from all users. However, you can customize whose review a user can view here. Only allow users to view reviews posted by users from:

☐ Users' Connect Connection ☐ Users' Position ☐ Users' Division ☐ Users' Cost Center ☐ Users' Location ☐ Users' All Custom OU Types

TRAINING PREFERENCE

Apply to: ◉ All Training
○ Customized

☐ 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.

Save Cancel

Training Completion Page

Prior to this enhancement, upon completing training, users were returned to their Transcript with no confirmation that the training was completed. Post-completion workflows, such as printing a Completion certification or providing a rating, were difficult to locate and required users to follow a multi-step process, which often resulted in users not being able to complete the actions.

With this enhancement, a Training Completion page can now be enabled for training.

A Training Completion page is a page that is available to a user when they complete the training. Depending on the configuration of the training and the portal, the Training Completion page may display any points or badges that were awarded, the opportunity to rate and review the training, and the option to view their certificate of completion.

If a Training Completion page is available for a LO, then users can always manually navigate to the page via the Transcript Details page once the LO is completed. Automatic redirection to the Training Completion page only occurs for select LO types in certain scenarios. *See the Training Completion Page Availability & Redirection section below for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Badge - View	Grants ability to view the Badge field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Learning Points - View	Grants ability to view the Points field on the LO Details page and the Training Completion page. This permission cannot be constrained.	Learning
Snapshot - Leaderboard	Enables user to view the Leaderboard widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Leaderboard widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

Completion Message

A completion message is displayed at the top of the Training Completion Page. This is intended to inform the user that they have successfully completed the training. This message may also provide the user a directive regarding next steps, such as how to rate the course or print a certificate of completion.

If the training title is included in the completion message, then the Training Completion page always displays the training's title at the time the training was completed. If the training title is updated in the future, the Training Completion page is not impacted.

Earned Badges and Points

The user may be awarded a badge and training points by completing the training:

- Badge - If the user is awarded a badge by completing the training, then this badge is displayed. If the user has the Snapshot - Badges permission, they can click the badge title to view the Snapshot - My Badges page. *See* **Snapshot - My Badges** on page 329 *for additional information.*
    - If there is no badge associated with the LO, then this information is hidden. Also, this information is only visible if the user has permission to view Learning Badges.
- Points - If the user earned points by completing the training, then the number of points that were earned is displayed. If the user has the Snapshot - Leaderboard permission, they can the **View Leaderboard** link to view the Snapshot - Leaderboard page. *See* **Snapshot - Leaderboard** on page 331 *for additional information.*
    - If no points were earned, then this information is hidden. Also, this information is only visible if the user has permission to view Learning Points.

Rate and Review the Training

To rate the training, click the **Rate this Training** link. This opens a pop-up, in which the user is able to assign a star rating and provide a review of the training.

The option to rate the training is available if the following are true:

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

Edit/Delete My Review

If the user has already rated the training, then the user's rating is displayed and an **Edit My Review** link is displayed. Users can click this link to edit their rating and review.

Also, an Options drop-down is available in the upper-right corner of the widget. The following options are available:

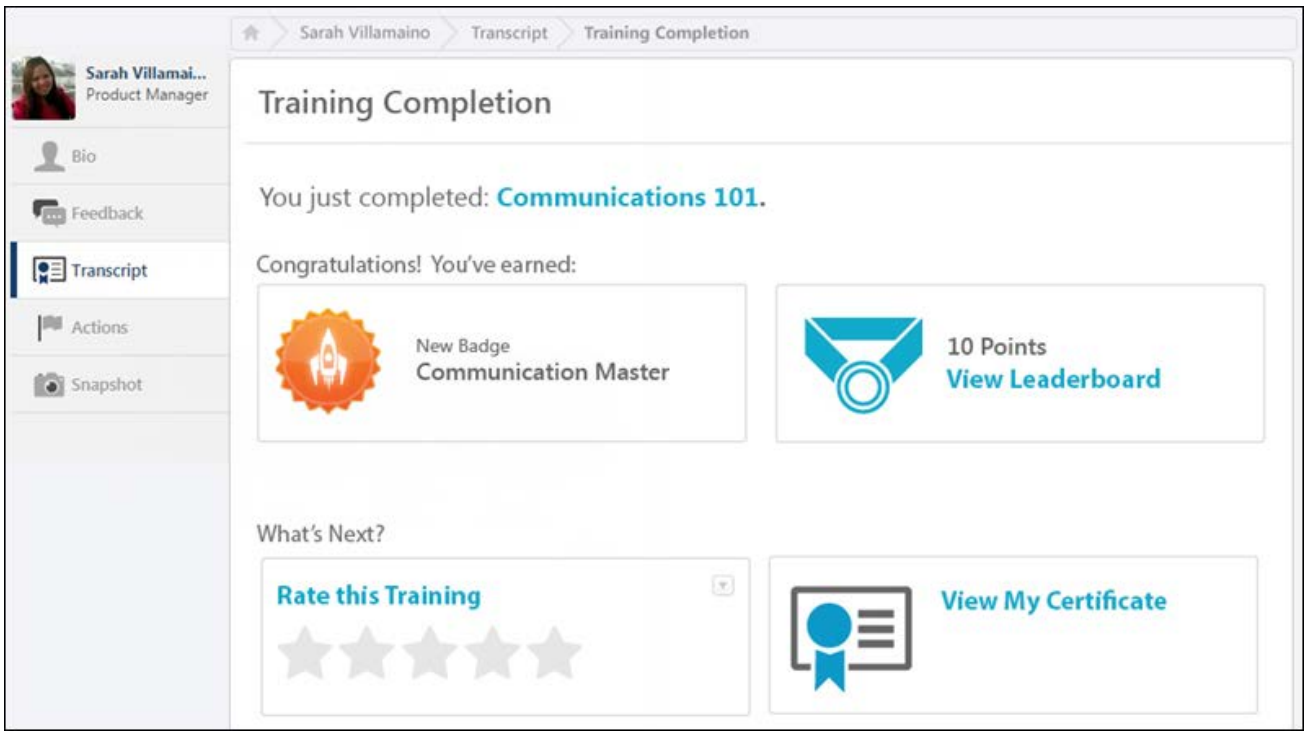
- Edit - Select this option to edit your review, including the rating and review text.
- Delete - Select this option to delete your review. The review will no longer be available on the Training Completion page or the LO Details page.

View Certificate of Completion

The user may be awarded a certificate of completion if the following are true:

- A certificate is associated with the training via Course Catalog or Default Certificate Preferences.
- The training has a status of Complete or Exempt.

To view and print the certificate of completion, click the **View My Certificate** link. This enables the user to instantly view their certificate, and they can choose to print it if necessary.



Training Completion Page Availability & Redirection

If a Training Completion page is available for a LO, then users can always manually navigate to the page via the Transcript Details page once the LO is completed. Automatic redirection to the Training Completion page only occurs for select LO types in certain scenarios.

Automatic Redirection

Automatic redirection only applies to the following LO types:

- Online Course
- Material
- Test
- Video

Automatic redirection occurs for the specified LO types in the following scenarios:

- User completes the LO (see exceptions below)
- User marks the LO Complete from their Transcript
- User marks the LO Complete from their Action Items
- User completes a recurrence of the LO
- User completes another version of the LO
- Test Only: The test is submitted and passed

Automatic redirection does NOT occur for the specified LO types in the following scenarios:

- Admin marks the LO Complete from the Transcript Details Page
- Admin marks the user Exempt from the LO from the Transcript Details page
- User completes the LO as an associated LO in the following scenarios:
  - Prerequisite
  - Pre-work
  - Post-work
  - Within cohort structure
  - Within curriculum structure
  - Within library structure
- LO is a Training Equivalent or Language Equivalent - Only the LO that is completed will redirect
- When a LO is in a pre-completion status due to a required action:
  - Pending Signature
  - Pending Evaluation
  - Pending Acknowledge
  - Pending Post Work
- Upon completing required pre-completion work:
  - Pending Signature
  - Pending Evaluation
  - Pending Acknowledge
  - Pending Post Work
- When completing a LO launched from the following:
  - Welcome Page Widget
  - Deep Link
  - LO DetailsPage - This only applies to Online Courses
- The system is in Low Bandwidth mode - This is controlled by a backend setting.
- Test Only:
  - Test is submitted and failed
  - Test contains free-form questions

Manual Redirection

User's can manually navigate to the Training Completion page from the Transcript Details page for the following LO types:

- Online Course

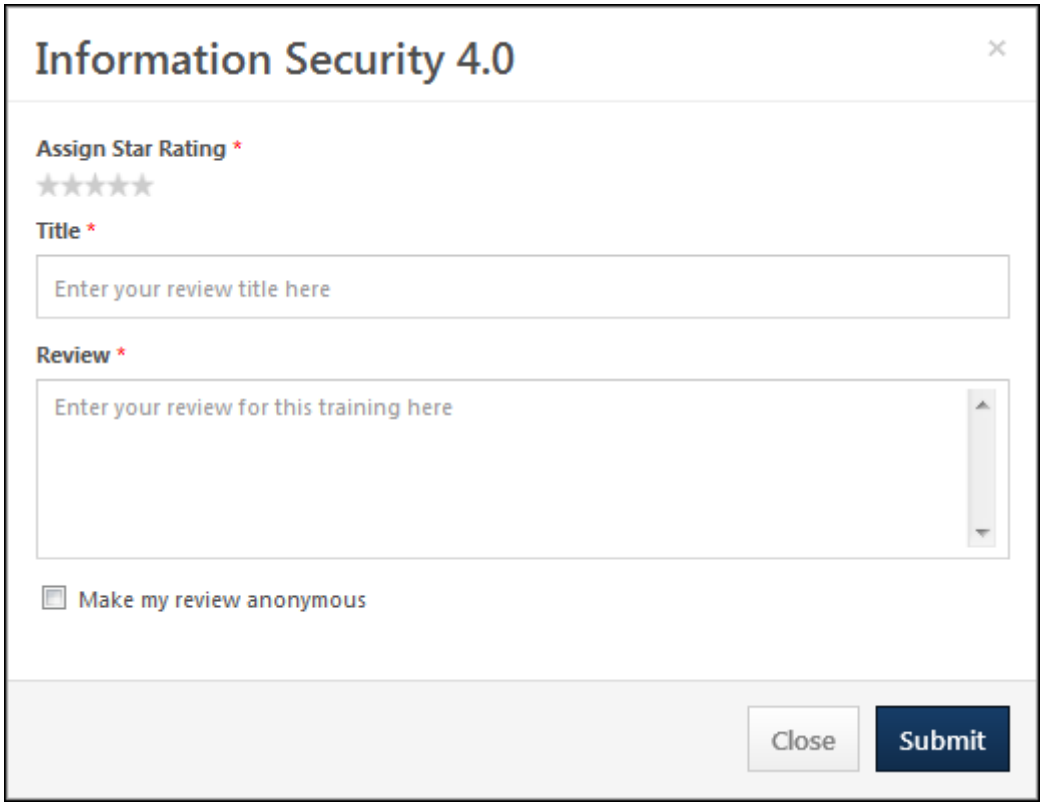
- Event
- Quick Course
- Curriculum
- Test
- Library
- Materials
- Video
- Cohort

From within the Curriculum Player and Cohort Player, can select the **View Completion Page** option from the **Options** drop down to manually navigate to the Completion Page once the LO is in the Completed status.

Training Completion Page - Rate This Training

Prior to this enhancement, when providing a rating for a course, users were always required to provide a review for the course, including a review title and review text.

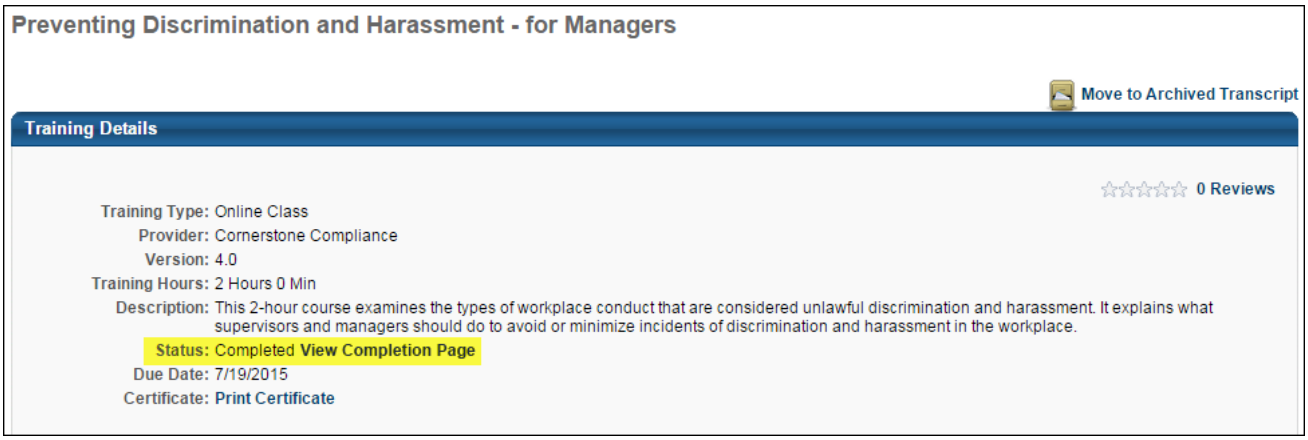
With this enhancement, administrators are able to configure whether or not users are required to provide a review title and review text when rating a course. When a review title and review text are not required, then the **Title** and **Review** fields are available, but they are not required when rating the training. When these fields are not required, then a red asterisk is not displayed next to the field names.



Transcript Details Page - View Completion Page

With this enhancement, a Training Completion page can now be enabled for training. If a user has completed a learning object (LO), and the LO has a Training Completion page enabled, then users can view their Training Completion page from their Transcript Details page.

A **View Completion Page** link is now available to the right of the Status field when the LO is in a Completed status and the LO has a Training Completion page available. *See* **Training Completion Page** on page 362 *for additional information.*

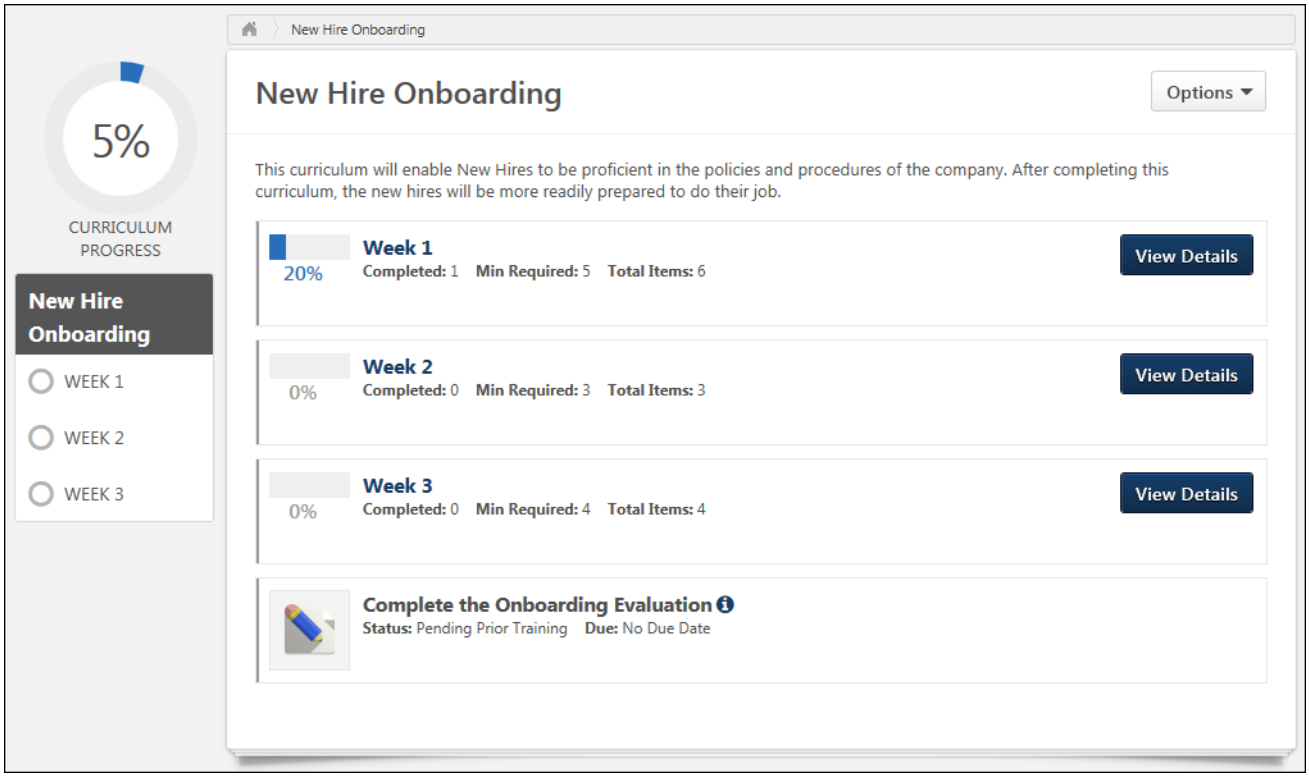


Curriculum Player - Options Drop-down

With this enhancement, a Training Completion page can now be enabled for training. In order to support this enhancement, the Curriculum Player is enhanced to allow users to view their Training Completion page for the curriculum.

The **TRAINING DETAILS** button is removed from the Curriculum Player, and an **Options** drop-down is now available. This drop-down contains the following options:

- View Completion Page - This opens the Training Completion page for the curriculum. This option is only available once the user has completed all of the required LOs for the curriculum. Also, this option is only available if a Training Completion page is enabled for the curriculum.
- Training Details - This is the same as the previously existing **TRAINING DETAILS** button.

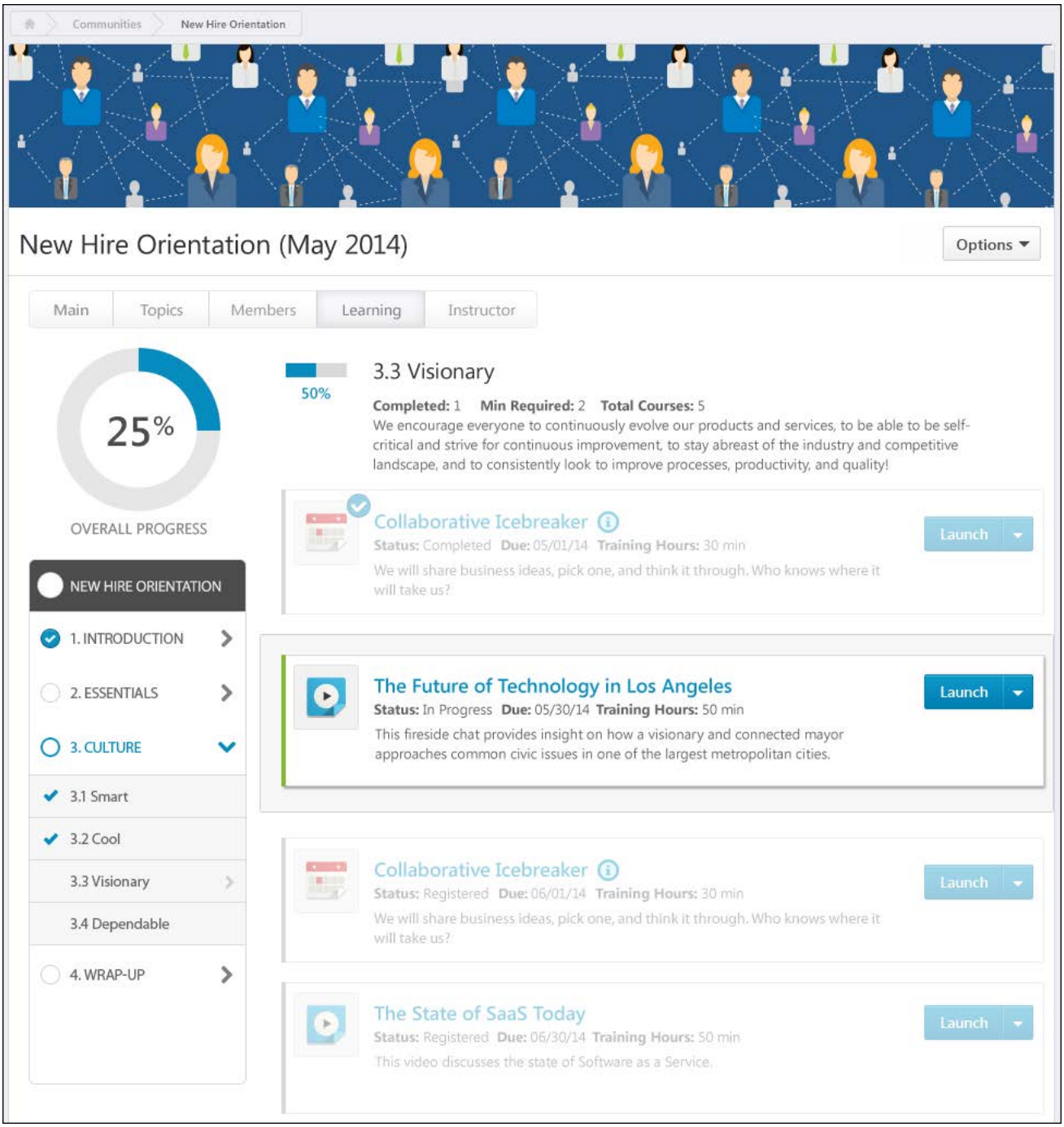


Cohort Community - Learning Tab - Options Drop-down

With this enhancement, a Training Completion page can now be enabled for training. In order to support this enhancement, the Learning tab of cohort communities is enhanced to allow users to view their Training Completion page for the cohort.

The **TRAINING DETAILS** button is removed from the Learning tab of the cohort community, and an **Options** drop-down is now available. This drop-down contains the following options:

- View Completion Page - This opens the Training Completion page for the cohort. This option is only available once the user has completed all of the required LOs for the cohort. Also, this option is only available if a Training Completion page is enabled for the cohort and if the cohort End Date has passed.
- Training Details - This is the same as the previously existing **TRAINING DETAILS** button.


Communities
New Hire Orientation
New Hire Orientation (May 2014)
Options
Main
Topics
Members
Learning
Instructor
25%
OVERALL PROGRESS
NEW HIRE ORIENTATION
1. INTRODUCTION
2. ESSENTIALS
3. CULTURE
3.1 Smart
3.2 Cool
3.3 Visionary
3.4 Dependable
4. WRAP-UP
50%
3.3 Visionary
Completed: 1 Min Required: 2 Total Courses: 5
We encourage everyone to continuously evolve our products and services, to be able to be self-critical and strive for continuous improvement, to stay abreast of the industry and competitive landscape, and to consistently look to improve processes, productivity, and quality!
Collaborative Icebreaker
Status: Completed Due: 05/01/14 Training Hours: 30 min
We will share business ideas, pick one, and think it through. Who knows where it will take us?
Launch
The Future of Technology in Los Angeles
Status: In Progress Due: 05/30/14 Training Hours: 50 min
This fireside chat provides insight on how a visionary and connected mayor approaches common civic issues in one of the largest metropolitan cities.
Launch
Collaborative Icebreaker
Status: Registered Due: 06/01/14 Training Hours: 30 min
We will share business ideas, pick one, and think it through. Who knows where it will take us?
Launch
The State of SaaS Today
Status: Registered Due: 06/30/14 Training Hours: 50 min
This video discusses the state of Software as a Service.
Launch

Transcript Options - View Certificate

With this enhancement, if a user has completed a learning object (LO), and the LO has a certificate of completion, then users can now view their certificate when viewing completed training on their Transcript. The primary action for completed LO is View Certificate if the LO has an available certificate. The certificate is opened in a pop-up window.

Training Completion Signature at LO Level

Training Completion Signature at LO Level

An electronic signature (e-signature) is a signature that is provided electronically via the system. A training completion e-signature is provided by a user to confirm or indicate that they have completed the training. Users may be required to provide a training completion e-signature before a learning object (LO) is completed.

Prior to this enhancement, administrators could require training completion e-signatures by organizational unit (OU) and they could require this signature for certain LO types.

With this enhancement, administrators now configure whether a training completion electronic signature (e-signature) is required for specific learning objects (LOs). In addition, a new Default Training Completion Signature Preferences page is now available. This page enables administrators to configure the default setting for requiring training completion e-signature by LO type, which is set for a LO when the LO is created. Once the LO is created, administrators can modify this setting at the LO level via Course Catalog.

Use Cases

Jeff Miller is a Global LMS Administrator at ACME Corp. In this organization, there is only one Compliance Curriculum in the Course Catalog that requires e-signature for training completion. Previously, to enable e-signature, Jeff would enable it for all curricula even though only one curriculum needed it. With this enhancement, Jeff can choose to only enable e-signature for the Compliance Curriculum.

Jeff Miller is a Global LMS Administrator at ACME Corp. To ensure that the compliance in his organization is respected for the necessary LOs and to avoid any disruption in the e-signature workflows, Jeff sets the default e-signature requirement for all appropriate LO types. With this configuration, all LOs have a default e-signature requirement value when they are created. All ACME Corp local LMS Administrators can modify the value at the LO level via Course Catalog.

Considerations

The e-signature requirement can be configured at the LO level via Course Catalog for all LOs except for external training and postings. For these LO types, the default settings are applied to all instances, which are configured via Default Training Completion Electronic Signature Preferences.

Implementation

This functionality is only available to organizations using the Learning module and Training Completion Signature functionality.

In order to avoid any disruption to an organization's Training Completion Signature workflow, this functionality must be activated directly by administrators via Default Training Completion Signature Preferences.

Upon release, the previously existing e-signature functionality is not impacted, and the previous configuration remains active. To use the new functionality, administrators immediately have the ability to begin configuring their portal before activating the new functionality. The following steps should be taken prior to activating this functionality:

1. Course Catalog - Configure the **Required Electronic Signature** option for all learning objects via the Course Catalog. This can be done by editing individual LOs or by batch editing LOs.
2. Training Completion Electronic Signature Preferences - Configure the **Electronic Signature** option for all OUs via the Training Completion Electronic Signature Preferences page.
3. Default Training Completion Signature Preferences - Configure the default settings for the **Required Electronic Signature** option by LO type. This setting only impacts LOs that are created after this functionality is activated.

Because e-signatures play a significant role in certain compliance workflows, administrators must ensure that the e-signature settings are properly configured for all of their LOs within the Course Catalog prior to enabling this functionality.

After configuring these options, administrators can activate this functionality on the Default Training Completion Signature Preferences page. Once this functionality is activated, then the e-signature requirement settings are managed at the LO level via Course Catalog. An e-signature is only required for training completion if the following is true:

- The **Electronic Signature** option is selected for the user's OU within Training Completion Electronic Signature Preferences.
- The **Required Electronic Signature** option is selected for the LO within Course Catalog.

Note: *With the July 2016 release, all organizations that have Electronic Signature enabled will be automatically transitioned to managing e-signature requirements at the LO level via Course Catalog. This will occur even if the organization has not yet activated this transition. With the July 2016 release, the Change Default to Course Catalog section will be removed from the Default Training Completion Signature Preferences page.*

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Default Training Completion Signature Preferences	Grants ability to manage Default Training Completion Signature preferences at the portal level. This enables the administrator to set the default setting for whether an electronic training completion signature is required. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

The following existing permissions apply to this functionality:

PERMISSION	PERMISSION DESCRIPTION	CATEGORY

NAME		
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 Completion Signature Preferences	Grants ability to manage Training Completion Signature preferences, to configure a required electronic training completion signature. This permission works in conjunction with the Learning Preferences permission. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

Training Completion Electronic Signature Preferences

With this enhancement, administrators can now require a training completion electronic signature (e-signature) for specific learning objects (LOs). In addition, a new Default Training Completion Signature Preferences page is now available, which enables administrators to set the default setting for requiring training completion e-signature by LO type.

Before the system transitions from managing e-signature requirements at the OU level to controlling e-signature requirements at the LO level, an administrator must manually activate the transition via the Default Training Completion Signature Preferences page. *See* **Default Training Completion Signature Preferences** on page 379 *for additional information.*

- Before the transition is activated, the system utilizes the e-signature settings within Training Completion Electronic Signature Preferences. These settings are visible on the Training Completion Electronic Signature Preferences page, but they are disabled and cannot be modified. These settings control e-signature requirements by LO type at the OU level.
- After the transition is activated, the system utilizes the e-signature setting within the Course Catalog. This setting controls e-signature requirements at the LO level. The OU-level settings on the Training Completion Electronic Signature Preferences page are no longer visible.

When e-signature requirements are controlled at the LO level, then electronic signature is only required for a user when completing a LO if the following are both true:

- The **Electronic Signature** option is selected for the user's OU within Training Completion Electronic Signature Preferences.
- The **Required Electronic Signature** option is selected for the LO within Course Catalog.

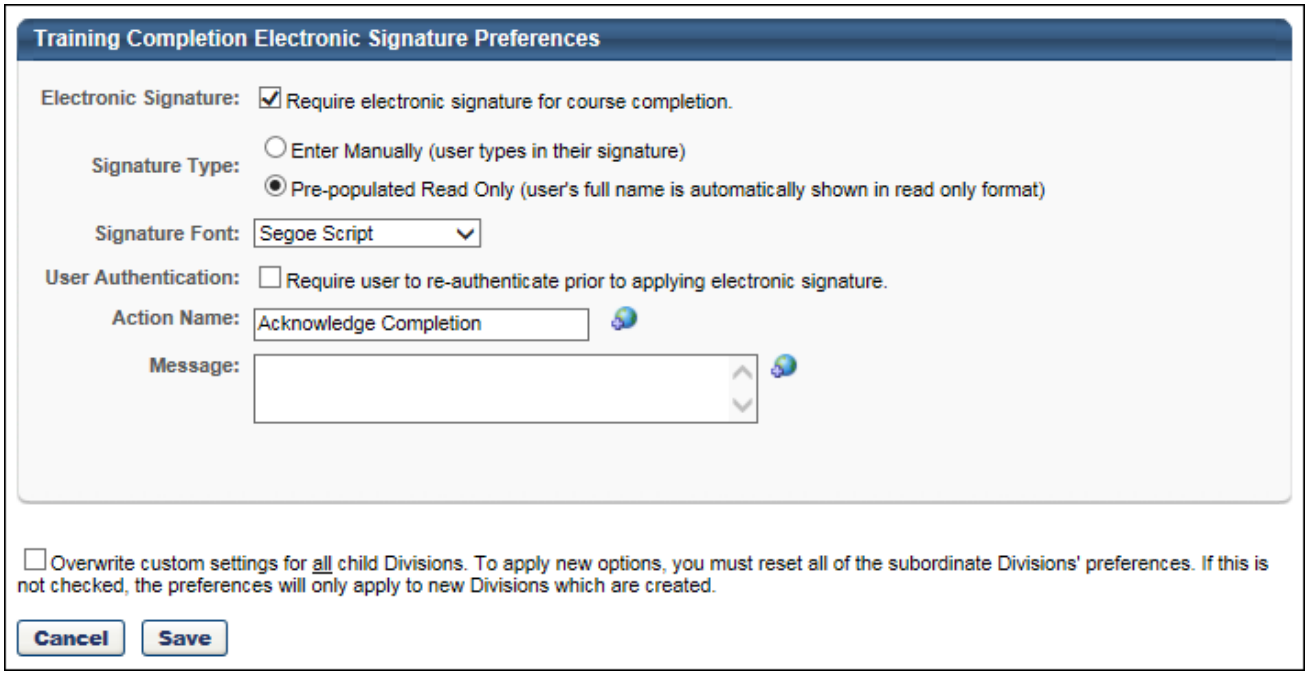
On this page, when the **Electronic Signature** option is unselected, all other options on the page are hidden. As previously implemented, when the **Electronic Signature** is selected after being unselected, the **Signature Type** and **Signature Font** settings are reset to their default values, but the **User Authentication**, **Action Name**, and **Message** fields retain their previous values.

To manage Training Completion Signature Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > TRAINING COMPLETION SIGNATURE.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Completion Signature Preferences	Grants ability to manage Training Completion Signature preferences, to configure a required electronic training completion signature. This	Learning - Administration

	permission works in conjunction with the Learning Preferences permission. This permission can be constrained by OU and User's OU. This is an administrator permission.	



Default Training Completion Signature Preferences

An electronic signature (e-signature) is a signature that is provided electronically via the system. A training completion e-signature is provided by a user to confirm or indicate that they have completed the training. Users may be required to provide a training completion e-signature before a learning object (LO) is completed.

Prior to this enhancement, administrators could require training completion e-signatures by organizational unit (OU) and they could require this signature for certain LO types.

With this enhancement, administrators can now require a training completion e-signature for specific LOs.

When e-signature is enabled via Training Completion Electronic Signature Preferences, this page enables administrators to configure the default setting for requiring training completion e-signatures by LO type. In addition, this page enables administrators to choose when their portal switches from controlling e-signature requirements at the OU level to controlling them at the LO level.

To manage Default Training Completion Signature Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > DEFAULT TRAINING COMPLETION SIGNATURE.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Default Training Completion Signature Preferences	Grants ability to manage Default Training Completion Signature preferences at the portal level. This enables the administrator to set the default setting for whether an electronic training completion signature is required. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

Require Training Completion E-signature by LO Type

Training completion e-signatures can be required at the LO level, and this is configured in the Course Catalog.

When e-signature is enabled via Training Completion Electronic Signature Preferences, this section enables the administrator to configure the default setting for requiring training completion e-signature by LO type. For example, if the Curriculum option is selected, then when a new curriculum is created, the **Required Electronic Signature** option is selected by default for the curriculum on the General page of the Course Catalog.

Select which LO types require the e-signature for completion by default. All LO types are unselected by default. Administrators can choose to enable or disable the e-signature requirement for each individual LO via the Course Catalog. This setting only determines the default configuration.

- For online courses, the default setting is applied when the course is published.
- For events, the default setting is applied to the event when the event is created. Any changes to this setting do not impact existing events. When a session is created for an event, the session inherits the signature requirement directly from the event.
- For programs, the default setting is applied to the program when the program is created. Any changes to this setting do not impact existing programs. When a cohort is created for a program, the cohort inherits the signature requirement directly from the program.
- For external training, any external training that is added throughout the system will inherit this setting. This setting cannot be changed for the external training once it is created.

Any changes to these default settings only impact newly created LOs. Any existing LOs are not impacted by changes to these settings.

Change Default to Course Catalog

Prior to the April 2016 release, e-signature settings were managed by LO type. With the April 2016 release, e-signature settings are now managed at the LO level.

This section enables administrators to choose when their portal switches from controlling e-signature requirements by LO type to controlling them at the LO level.

Because e-signatures play a significant role in certain compliance workflows, it is important that organizations configure all of their LOs within the Course Catalog prior to enabling this functionality to ensure that there are no compliance issues or disruptions to existing workflows.

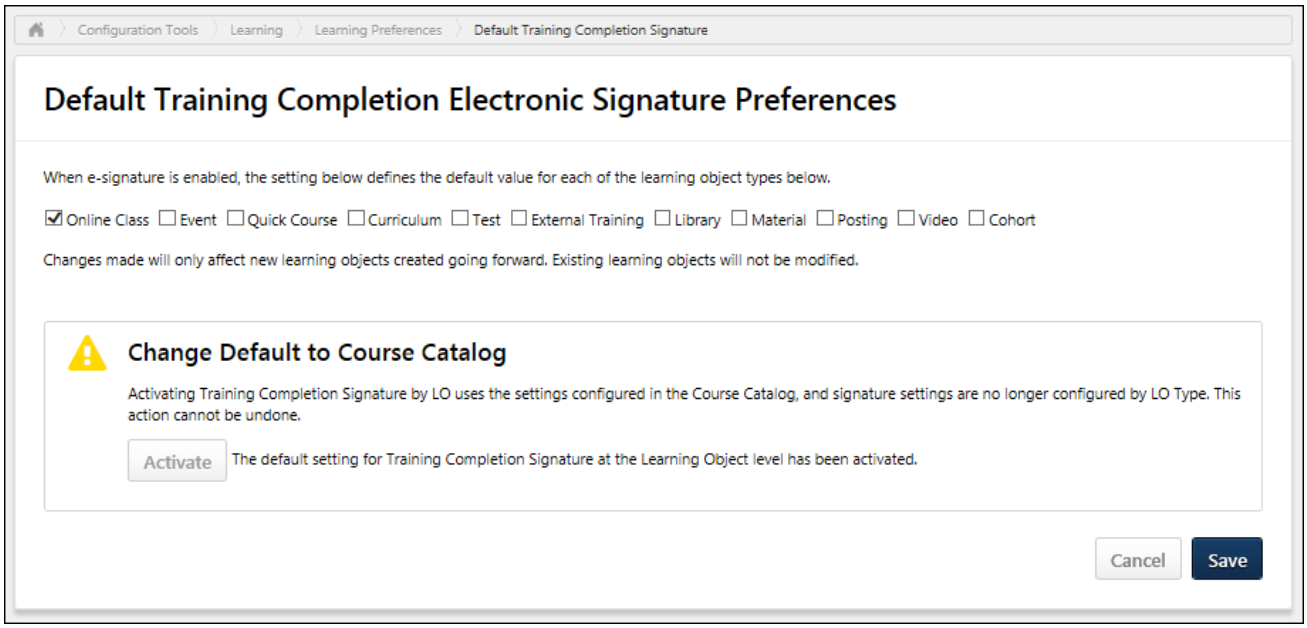
To enable the system to transition from managing e-signature requirements by LO type to controlling e-signature requirements at the LO level, click the **ACTIVATE** button. This opens a confirmation pop-up that explains the implications of activating this functionality. To confirm the activation, click the **ACTIVATE** button within the pop-up. This action cannot be undone.

- Before Activation - The system utilizes the e-signature settings within the Training Completion Electronic Signature Preferences. These settings are visible on the Training Completion Electronic Signature Preferences page, but they are disabled and cannot be modified. These settings control e-signature requirements by LO type at the OU level.
- After Activation - The system utilizes the e-signature setting within the Course Catalog. This setting controls e-signature requirements at the LO level. The settings by LO type on the Training Completion Electronic Signature Preferences page are no longer visible.

Note: *With the July 2016 release, all organizations that have Electronic Signature enabled will be automatically transitioned to managing e-signature requirements at the LO level via Course Catalog. This will occur even if the organization has not yet activated this transition. With the July 2016 release, the Change Default to Course Catalog section will be removed from the Default Training Completion Signature Preferences page.*

Save/Cancel

Click **SAVE** to commit any unsaved changes. Or, click **CANCEL** to discard any unsaved changes. ***Note:*** *Activating the transition to managing e-signature requirements via Course Catalog is automatically implemented as soon as it is activated. This occurs regardless of whether the* **SAVE** *button is clicked.*



Course Catalog - General - Required Electronic Signature

With this enhancement, administrators now have the ability to require a training completion signature for each individual learning object (LO).

To support this enhancement, the General tab of the Course Catalog now has an additional option that enables administrators to elect to require a training completion signature for the LO.

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 Completion Signature Preferences	Grants ability to manage Training Completion Signature preferences, to configure a required electronic training completion signature. This permission works in conjunction with the Learning Preferences permission. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

General Tab

The following options are now available on the General tab of the Course Catalog:

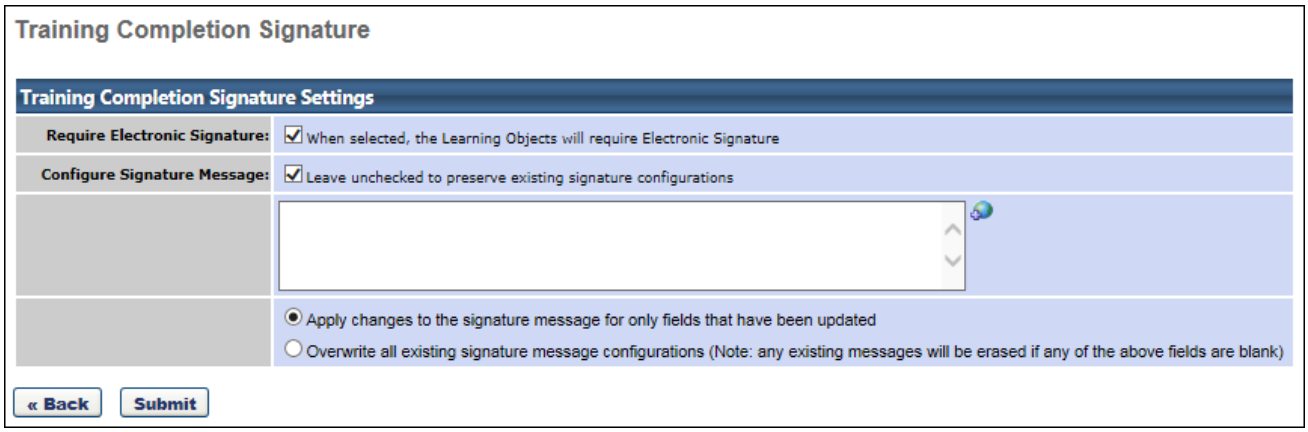
- **Required Electronic Signature** - ***Implementation Note:*** *This option is not enforced until this functionality is activated via Default Training Completion Signature Preferences. However, it is critical that administrators configure this option for all LOs prior to activating this functionality.* When this option is selected, a user who has completed the training must provide an electronic training completion signature in order for the training to be considered Completed. In order for a user to be required to provide an electronic completion signature, the Electronic Signature functionality must also be enabled for the user's OU via Training Completion Electronic Signature Preferences. When a LO is created, the default setting for this option is determined in Default Training Completion Signature Preferences.

When a new version of a LO is created, the new version inherits the previous version's value for this field.

Batch Editing - Edit Signature

When batch editing LOs via the Course Catalog, this field can be edited via the **Edit Signature** option. The following options are available:

- **Required Electronic Signature** - ***Implementation Note:*** *This option is not enforced until this functionality is activated via Default Training Completion Signature Preferences. However, it is critical that administrators configure this option for all LOs prior to activating this functionality.* When this option is selected, a user who has completed the training must provide an electronic training completion signature in order for the training to be considered Completed. In order for a user to be required to provide an electronic completion signature, the Electronic Signature functionality must also be enabled for the user's OU via Training Completion Electronic Signature Preferences. . When a LO is created, the default setting for this option is determined in Default Training Completion Signature Preferences.
- **Configure Signature Message** - This option is unselected by default. When this option is unselected, the Signature Message is not impacted. Select this option to set the same Signature Message for all of the selected LOs. The following options are only available when this option is selected:
  - **Message** - In this field, enter the message that is displayed to users when they are providing an electronic training completion signature. This message is applied to all of the selected LOs. 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. By default, the administrator is modifying the message for their preferred language. ***Note:*** *This field is only available if you have permission to manage Training Completion Signature preferences.*
  - The following options are only available if multiple languages are enabled for your portal:
    - **Apply changes to the signature message for only fields that have been updated** - This option is selected by default. When this option is selected, then any localized messages that the administrator adds are applied to all of the selected LOs. However, if the administrator does not add a message for a particular language, then the message for that language is not updated for any of the selected LOs. For example, if a localized message is provided for English and French then any existing English and French messages are overwritten, and all other previously existing translations are not impacted.
    - **Overwrite all existing signature message configurations** - Use caution when selecting this option. When this option is selected, then all localizations of the message are overwritten with the values specified during the batch edit. This applies even if one or more of the messages are blank. For example, if a localized message is provided for English and French and all other localizations are blank, then the English and French messages are applied to all selected LOs, and the messages for all other available languages are removed.


Training Completion Signature
Training Completion Signature Settings
Require Electronic Signature:
When selected, the Learning Objects will require Electronic Signature
Configure Signature Message:
Leave unchecked to preserve existing signature configurations
Apply changes to the signature message for only fields that have been updated
Overwrite all existing signature message configurations (Note: any existing messages will be erased if any of the above fields are blank)
« Back
Submit


Edit Project Management 101
Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.
General
Prerequisites
Subjects
Skills
Competencies
Acknowledger
Approval Wor
Availability
Emails
Recommenda
Pricing
Edit Training
Original Title: 2011 Fall Release - Summarized Reporting Enchancement
Title: Project Management 101
Provider: 1st World Library
Type: Online Class
Version: 1.0
Learning Object Id: a82eadc6-58b5-4b63-b61b-4835a0f394fc
Keywords:
Description:
Thumbnail Image:
Browse...
Upload
For the best quality thumbnail, images of 200x200 pixels and approximately 20KB are recommended.
Resources:
Add Attachment
No attachments have been uploaded for this Online Class
Available Languages:
English (US)
Default Language:
English (US) : This is the language shown to the user if the course is not localized in their language.
Points:
25
Badge:
Add Badge
Project Management
Credits:
0
Max Score:
0
If this value is set to 0 then no score will be displayed on the user's transcript. This field shows the points possible for the course.
Pre-Work:
Add Pre-Work
Post-Work:
Add Post-Work
Target Audience:
Request Form:
Please select a Request Form
Required Completion Approvals:
Place a value in this box greater than 0 to require this number of training completion approvals to all users who complete this training. Upon completion user's status will proceed to Pending Completion Approval before moving to Completed. If this box is blank, the LO will not require completion approval.
Screen Resolution:
Enter pixel values in the width and height boxes to control the window size of this course upon launch. The course will open with the specified size and may not be adjusted by the end user. Leaving the fields blank will allow the window to launch in its standard size.
Width: pixels. Height: pixels.
Recurrence:
When a curriculum active for recurrence is re-requested or re-assigned, the internal learning objects will be reset.
Allow users to request this training more than once.
Allow this training to be assigned to the same user more than once.
Allow subsequent instances of training to be approved based on original approval. Leave unmarked to apply approval workflow for every request.
Available Offline:
Allow download for offline consumption
Allow launch from offline network location
Language Equivalents:
If a training item is available in the user's portal display language, the language equivalent training will be displayed to the user by default. Do not exceed one training item per language.
Add Language Equivalents
Training Equivalence:
User who completes one of the following training items will acquire a completed (equivalent) status for the current training item on transcript.
Add Training Equivalents
Training Purpose:
Indicate the training purposes available for selection in a drop down by the end user:
Knowledge Management
New Course Version
Exclude from Course Recommendations:
When selected, this training will not be recommended to users via Course Recommendations.
Active:
When selected, this training is active
Deactivate this course on
Mobile:
Allow this training to be viewed via the Cornerstone Mobile application/website.
Note: For mobile devices, please ensure no plugins (i.e Flash, Java) are required for the course.
Required Electronic Signature:
Signature Message:
Provide a message to override the default electronic signature message.
Compatibility Mode:
None
Enable Completion Page:
When selected, the Training Completion page will display after users have completed this training
Enable Default Completion Message
Display completion message defined in Training Completion preferences to users. If unchecked, you can customize the completion message specifically for this training.
Cancel
Save
Modification History

Transcript - Completion Signature

Prior to this enhancement, users could only provide a completion signature from the training's Transcript Details page.

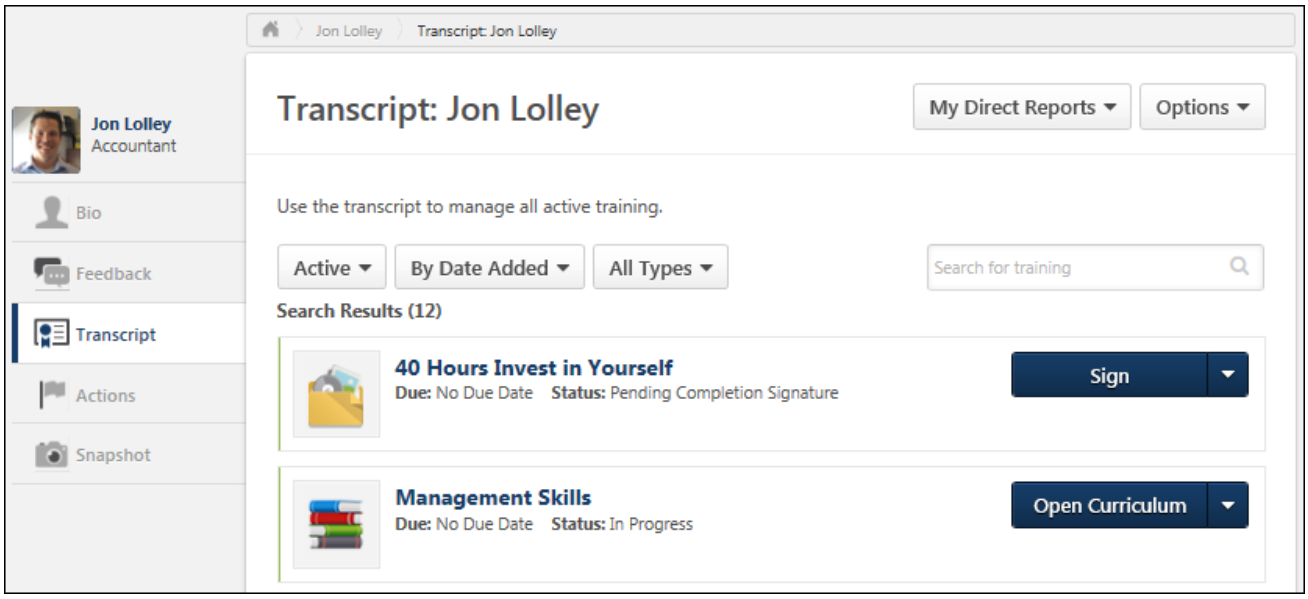
With this enhancement, users are now able to provide a completion signature from their Transcript.

A Sign option is available for a training item on the Transcript page if the user has completed the training and a completion signature is required for the training. When this option is selected, the user is navigated to the Transcript Details page for the training, where the user can provide a completion signature.

The Acknowledgment Title and Message can be configured at the organizational unit (OU) level via Training Completion Signature Preferences Also, the Message can be configured at the learning object (LO) level via Course Catalog. The settings at the LO level override any settings at the OU level.

Training completion signature is required for a LO if the following is true:

- The **Required Electronic Signature** option is selected within Course Catalog for the LO.
- The **Electronic Signature** option is selected for the user's OU within Training Completion Signature Preferences.



Training Plan Dynamic Update

Training Plan Dynamic Update

Training plans are tasks in Cornerstone functionality where Plan Contributors identify training needs for a particular group of users for a specific period of time. The Plan Contributor then adds these needs to the training plan as requests, which are reviewed by the Plan Managers. Plan Managers review the training requests and approves or denies the requests.

Prior to this enhancement, Plan Contributors were defined when the training plan task was defined. When a Plan Contributor moved to a different position or department within the organization, the training needs that the Plan Contributor identified for users were removed from the training plan and were lost. For example, if a plan contributor identified training needs for a user, and then the Plan Contributor moved to a different department, the training needs that had been identified for the user would be removed. The new Plan Contributor would need to redo the planning efforts that had previously been done.

With this enhancement, when a training plan is configured with managers as Plan Contributors planning for their subordinates and a new manager is identified for a user on their user record, then an automatic workflow moves the training needs to the user's new manager who is acting as a Plan Contributor. Any training needs that have been identified for a subordinate within a training plan will remain associated with the subordinate even if the subordinate is moved to a new plan contributor. This enables organizations that are using training plans with Plan Contributors planning for their subordinates to more effectively identify training needs without having to worry about plan contributors changing. If a user who has training needs added by a previous Plan Contributor does not have a Plan Contributor (i.e., no manager identified on their User Record) for an extended period of time, the training needs for any impacted users is placed on hold and can be reviewed by administrators on the new On-Hold Training Needs page.

This enhancement also targets scenarios in which managers plan training needs for users who are not yet in the manager's scope. For example, a set of future hires may be set up as organizational units (OUs) within a training plan. For training needs that are identified for an OU within a training plan, if the Plan Contributor (Manager) is removed from a training plan, then the training needs that have been identified for the OU are visible on the On-Hold Training Needs page. However, when a new Plan Contributor (Manager) is identified for the OU, the training needs do not remain associated with the OU, and the new Plan Contributor must manually enter the training needs for the OU with the information provided by the Training Plan Administrator.

A user may be removed from the plan contributor role in the following scenarios:

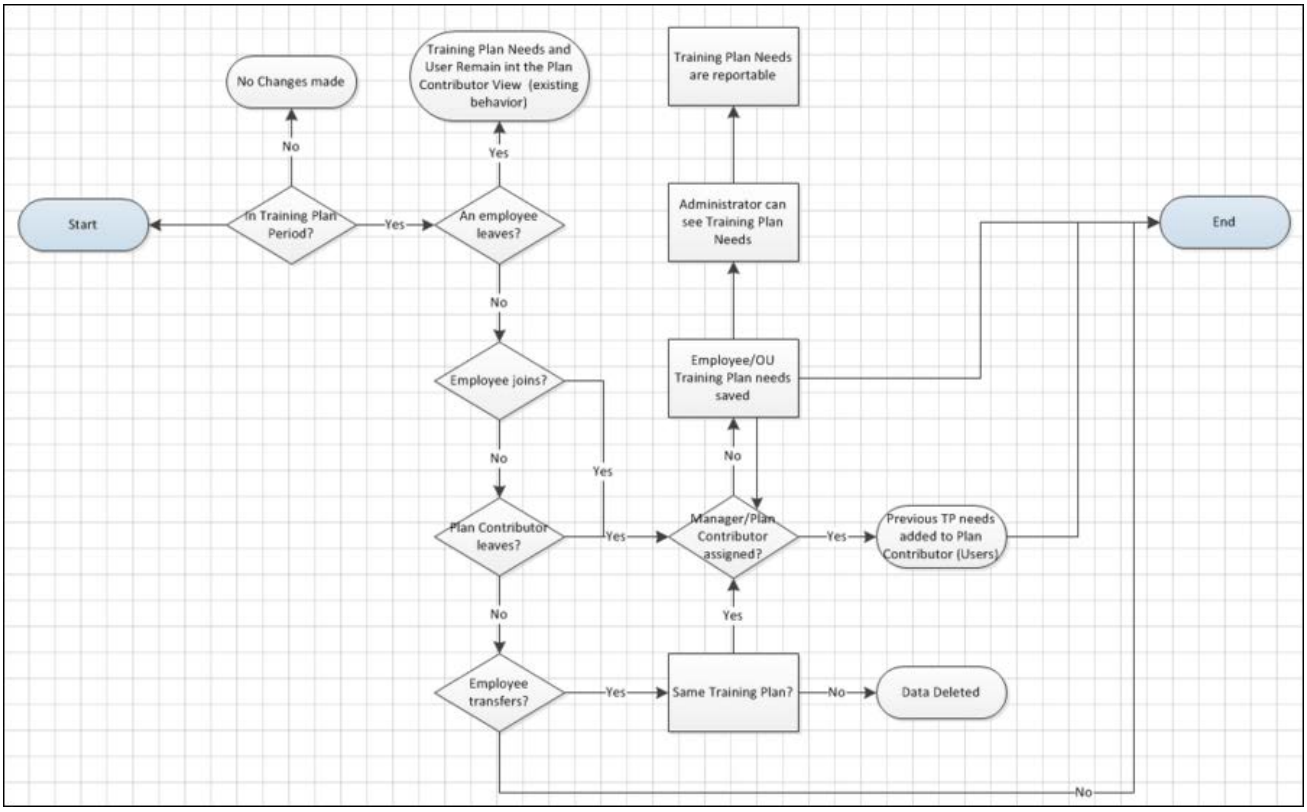
- The Plan Contributor (Manager) is deactivated in the system because they are no longer with the organization.
- The Plan Contributor (Manager) moves to a new position and no longer meets the plan contributor criteria.
- The user (manager) is no longer a manager.

When a user is removed from the Plan Contributor role, any training plan needs that they have identified are stored and are visible on a new On-Hold Training Needs page.

- If the training plan is expired before the Plan Contributor is removed, then the training needs are not stored and they are not visible on the On-Hold Training Needs page.

When a user moves into a Plan Contributor (Manager) role in which a previous Plan Contributor (Manager) had identified training needs, the new Plan Contributor inherits the previous Plan Contributor's training need information. This enables the new Plan Contributor (Manager) to continue completing the training plan without needing to redo the previous Plan Contributor's efforts.

Workflow



Use Cases

The following personas are used within the use cases:

- Jeff (Training Manager) - Jeff manages the company trainings. He will validate and arbitrate the training plan needs. He is the Plan Manager.
- Vicky (Manager of Product Management) - Vicky manages the Learning Management System (LMS) Product Management team. AK is her direct subordinate. Vicky will plan training needs for her and any new members who will join her as direct reports (anonymous users). She is a Plan Contributor.
- AK (Product Management Lead) - AK is Vicky's direct subordinate. AK manages Sara and Laurence. She will plan training needs for them and any new members who will join them as direct reports (anonymous users). She is a Plan Contributor.

- Sarah and Laurence (Product Managers) - Sarah and Laurence are direct subordinates of AK.

Use Case 1: Employee Transfer

Jeff is a Plan Manager, and he has set up the training plan with managers (Plan Contributors) to forecast training needs for their direct subordinates. When he set up the plan, Laurence was Vicky's direct report, but now she reports to the newly promoted Lead Manager, AK. Vicky has already added training needs for Laurence, and AK should retrieve all of the training needs that have been identified for Laurence.

Use Case 2: Manager Leaves

Jeff is a Plan Manager, and he has set up the training plan with managers (Plan Contributors) to forecast training needs for their direct subordinates. When he set up the plan, AK's direct reports were Sarah and Laurence. AK has left the company and is now replaced by Susan. As AK is deactivated in the system, all training needs she has already identified for Sarah and Laurence should be maintained and visible to Susan.

Use Case 3: Manager Leaves and is not Replaced Immediately

Jeff is a Plan Manager, and he has set up the training plan with managers (Plan Contributors) to forecast training needs for their direct subordinates. When he set up the plan, AK's direct reports were Sarah and Laurence. AK has left the company and Sarah and Laurence have no new manager. Until a new manager is added for those users, all training needs that AK has identified for Sarah and Laurence are put on hold and will be visible to the new manager when one is assigned.

Use Case 4: Employee Leaves

AK is a plan contributor, and she has identified training needs for Sarah and Laurence. Sarah moves to a new position, and her new position is not included in the training plan. The training needs that have been identified for Sarah are removed from the training plan, and they cannot be restored.

Implementation

This functionality is automatically enabled for all organizations using Training Plans within the Learning module. This applies only to Training Plan configuration where Plan Contributors are managers who are planning for their direct subordinates (User’s Subordinates) and their OUs (User’s OU).

Glossary

- On-hold - This status refers to a user or OU within a training plan who does not currently have a training plan contributor.
- Plan Contributor - Within a training plan, Plan Contributors are responsible for identifying training needs and adding training requests to the training plan for the group for which they are planning.
    - For this enhancement, Plan Contributors are managers who have subordinates identified in their User Records.

- Plan Manager - Within a training plan, Plan Managers are responsible for reviewing training plans created by plan contributors.
- Training Demand Forecasting - This enables an organization to forecast training demand by collecting and reviewing training needs and requests. Collection of these needs enables the organization to plan, budget, assess, and implement an effective training program. Also, reporting tools enable the organization to view the needs for a segment of the organization and compare those needs across the broader organization.
- Training Plan - A task in which Plan Contributors identify training needs for a particular group of users. The Plan Contributor then adds these needs to the training plan as requests, which are reviewed by the Plan Managers. Plan Managers review and arbitrate the training requests and approve or deny the requests.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Forecast Administration	Grants access to create and edit training plans. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Training Plan Co-Owner	This permission is not visible within the system because it is a dynamically assigned permission that is assigned to a user when they are designated as a co-owner for a training plan. Users with this permission can access the Training Forecast Administration page and can only access training plans for which they are a co-owner.	Learning

Training Plan Details - View On-hold Users

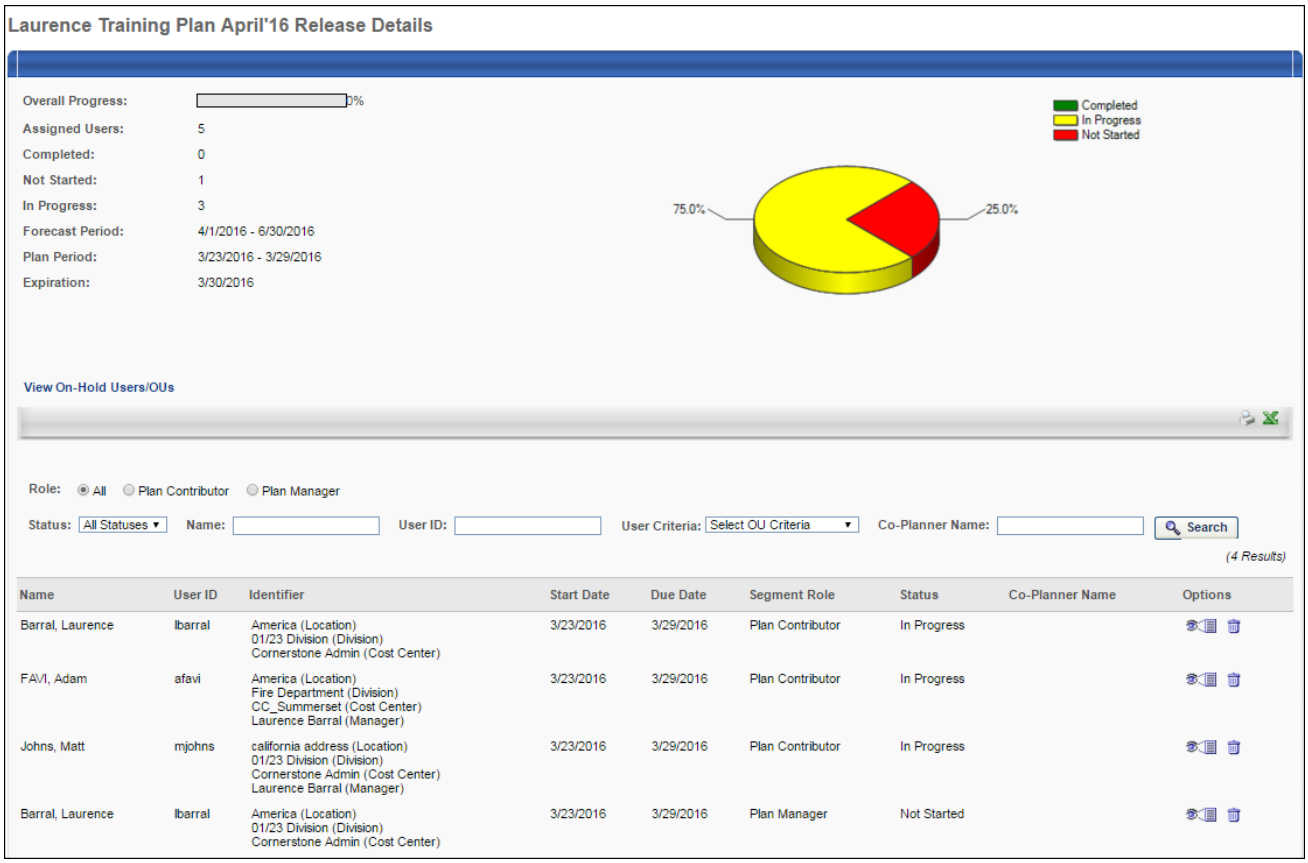
With this enhancement, users with training needs who currently do not have a Plan Contributor are listed on the new On-hold page. This enables the system to store any training needs that have been identified by a previous Plan Contributor so that they can be automatically added to the next Plan Contributor (Manager) by adding a manager in the user record. Or, the Training Plan Administrator can manage those needs separately.

In order to support this enhancement, administrators can now access a list of all on-hold users from the Training Plan Details page. If the training plan has users who are in an On-hold status, then a **View On-Hold Users/OUs** link is available below the **Expiration** field. *See* **Training Plan - On-Hold Training Needs** on page 394 *for additional information.*

To access the Training Plan Details page, go to ADMIN > TOOLS > LEARNING > TRAINING PLANS. Then, click the View Details icon for the training plan.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Forecast Administration	Grants access to create and edit training plans. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Training Plan Co-Owner	This permission is not visible within the system because it is a dynamically assigned permission that is assigned to a user when they are designated as a co-owner for a training plan. Users with this permission can access the Training Forecast Administration page and can only access training plans for which they are a co-owner.	Learning


Laurence Training Plan April'16 Release Details
Overall Progress: 0%
Assigned Users: 5
Completed: 0
Not Started: 1
In Progress: 3
Forecast Period: 4/1/2016 - 6/30/2016
Plan Period: 3/23/2016 - 3/29/2016
Expiration: 3/30/2016
Completed
In Progress
Not Started
75.0%
25.0%
View On-Hold Users/OUs
Role: All Plan Contributor Plan Manager
Status: All Statuses
Name:
User ID:
User Criteria: Select OU Criteria
Co-Planner Name:
Search
(4 Results)
Name User ID Identifier Start Date Due Date Segment Role Status Co-Planner Name Options
Barral, Laurence lbarral America (Location) 01/23 Division (Division) Cornerstone Admin (Cost Center) 3/23/2016 3/29/2016 Plan Contributor In Progress
FAVI, Adam afavi America (Location) Fire Department (Division) CC_Summerset (Cost Center) Laurence Barral (Manager) 3/23/2016 3/29/2016 Plan Contributor In Progress
Johns, Matt mjohns california address (Location) 01/23 Division (Division) Cornerstone Admin (Cost Center) Laurence Barral (Manager) 3/23/2016 3/29/2016 Plan Contributor In Progress
Barral, Laurence lbarral America (Location) 01/23 Division (Division) Cornerstone Admin (Cost Center) 3/23/2016 3/29/2016 Plan Manager Not Started

Training Plan - On-Hold Training Needs

Users and organizational units (OUs) within a training plan who do not currently have a Plan Contributor (Manager) are in an On-hold status. While users and OUs are in an On-hold status, the system maintains any training needs that were identified by their previous Plan Contributor (Manager) so that the training needs can be used by their next Plan Contributor (Manager).

The On-Hold Training Needs page displays all On-hold users and organizational units (OUs) within the Training Plan and all of the training needs that have already been identified for those users and OUs. Only active users are displayed.

This page is only available if the training plan has users or OUs in an On-hold status.

If a training plan has on-hold users or OUs, then this page remains accessible even if the training plan period has expired. However, no organizational modification (manager modification) will be handled after the Training Plan period has expired so that the Training Plan remains at the state that it was when it was validated.

To access the On-Hold Training Needs page for a training plan, go to ADMIN > TOOLS > LEARNING > TRAINING PLANS. Click the View Details icon for the training plan. Then, click the **View On-hold Users** link to the right of the **Assigned Users** field.

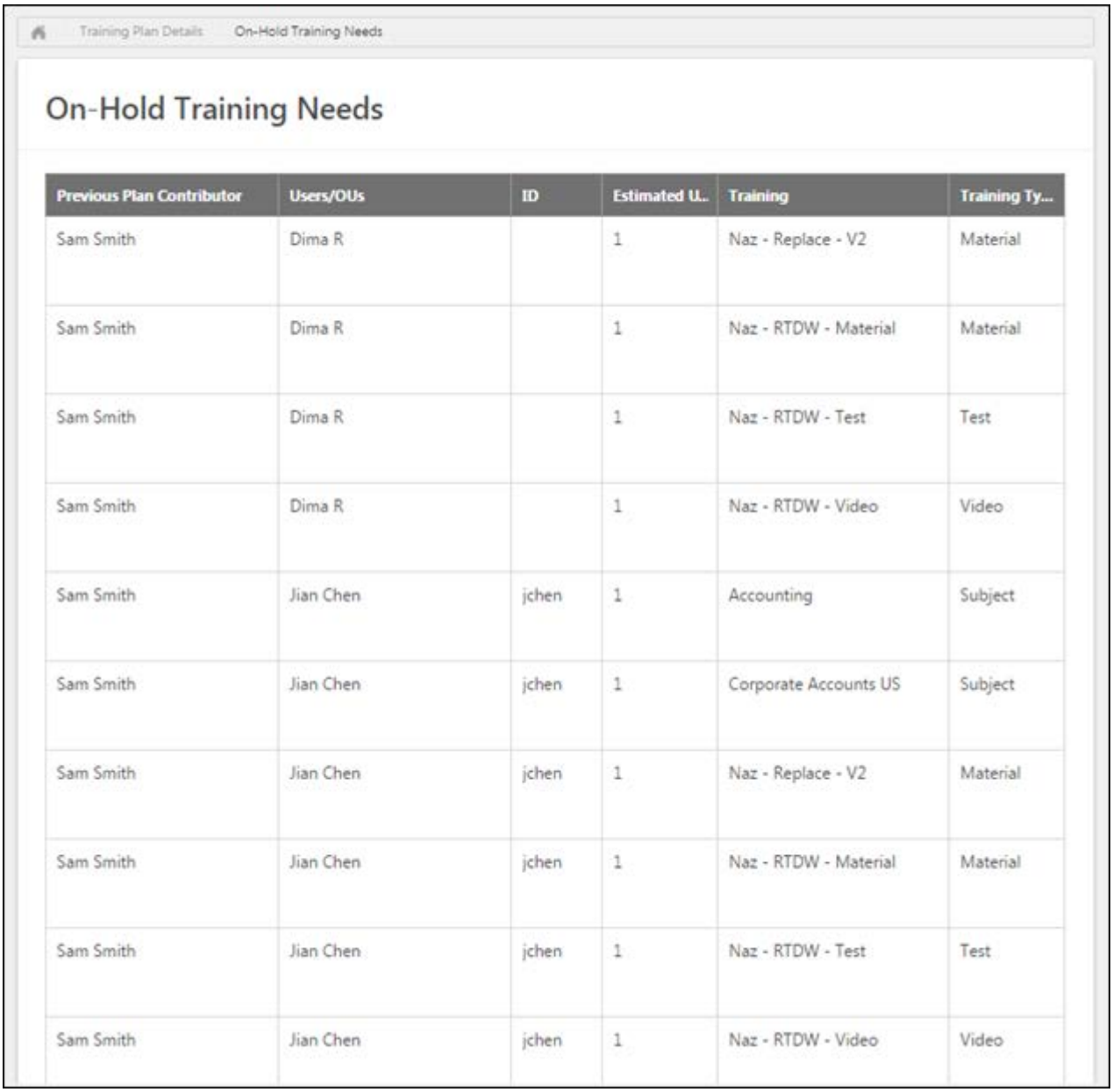
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Forecast Administration	Grants access to create and edit training plans. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Training Plan Co-Owner	This permission is not visible within the system because it is a dynamically assigned permission that is assigned to a user when they are designated as a co-owner for a training plan. Users with this permission can access the Training Forecast Administration page and can only access training plans for which they are a co-owner.	Learning

The following information is displayed for each on-hold user or OU:

- Previous Plan Contributor - This displays the manager who was previously serving as the Plan Contributor for the user or OU. This user is displayed even if the user is deactivated within the system.
- Users/OUs - This displays the name of the user or OU who currently does not have a Plan Contributor (Manager). When planning for an OU, only the OU name is displayed. The users within the OU are not displayed.
- ID - This displays the ID for the user or OU.

- Estimated Users - This displays the estimated number of users in the corresponding OU. For individual users, this is always 1. However, for OUs, this is the current estimated number of users who require the training. This indicates the number of instances of the training that are required.
- Training - This displays the name of the training that has been identified as a need for the corresponding user or OU.
- Training Type - This displays the training type that corresponds with the training need (e.g., Material, Subject, and External Training) depending on the Training Plan configuration.



Previous Plan Contributor	Users/OUs	ID	Estimated U...	Training	Training Ty...
Sam Smith	Dima R		1	Naz - Replace - V2	Material
Sam Smith	Dima R		1	Naz - RTDW - Material	Material
Sam Smith	Dima R		1	Naz - RTDW - Test	Test
Sam Smith	Dima R		1	Naz - RTDW - Video	Video
Sam Smith	Jian Chen	jchen	1	Accounting	Subject
Sam Smith	Jian Chen	jchen	1	Corporate Accounts US	Subject
Sam Smith	Jian Chen	jchen	1	Naz - Replace - V2	Material
Sam Smith	Jian Chen	jchen	1	Naz - RTDW - Material	Material
Sam Smith	Jian Chen	jchen	1	Naz - RTDW - Test	Test
Sam Smith	Jian Chen	jchen	1	Naz - RTDW - Video	Video

Training Plan - Plan Contributor and User Changes

When a Plan Contributor (Manager) is removed from the Plan Contributor (Manager) role, any training plan needs that they have identified are stored and are visible on a new On-Hold Training Needs page.

- If the Training Plan is expired before the contributor is removed, then the training needs are not stored and they are not visible on the On-Hold Training Needs page.

When a user moves into a Plan Contributor (Manager) role in which a previous Plan Contributor (Manager) had identified training needs, the new plan contributor inherits the previous Plan Contributor's training need information. This enables the new Plan Contributor (Manager) to continue completing the training plan without needing to redo the previous Plan Contributor's efforts.

Inherited Information

All training plan information is inherited by the new Plan Contributor, including the following information:

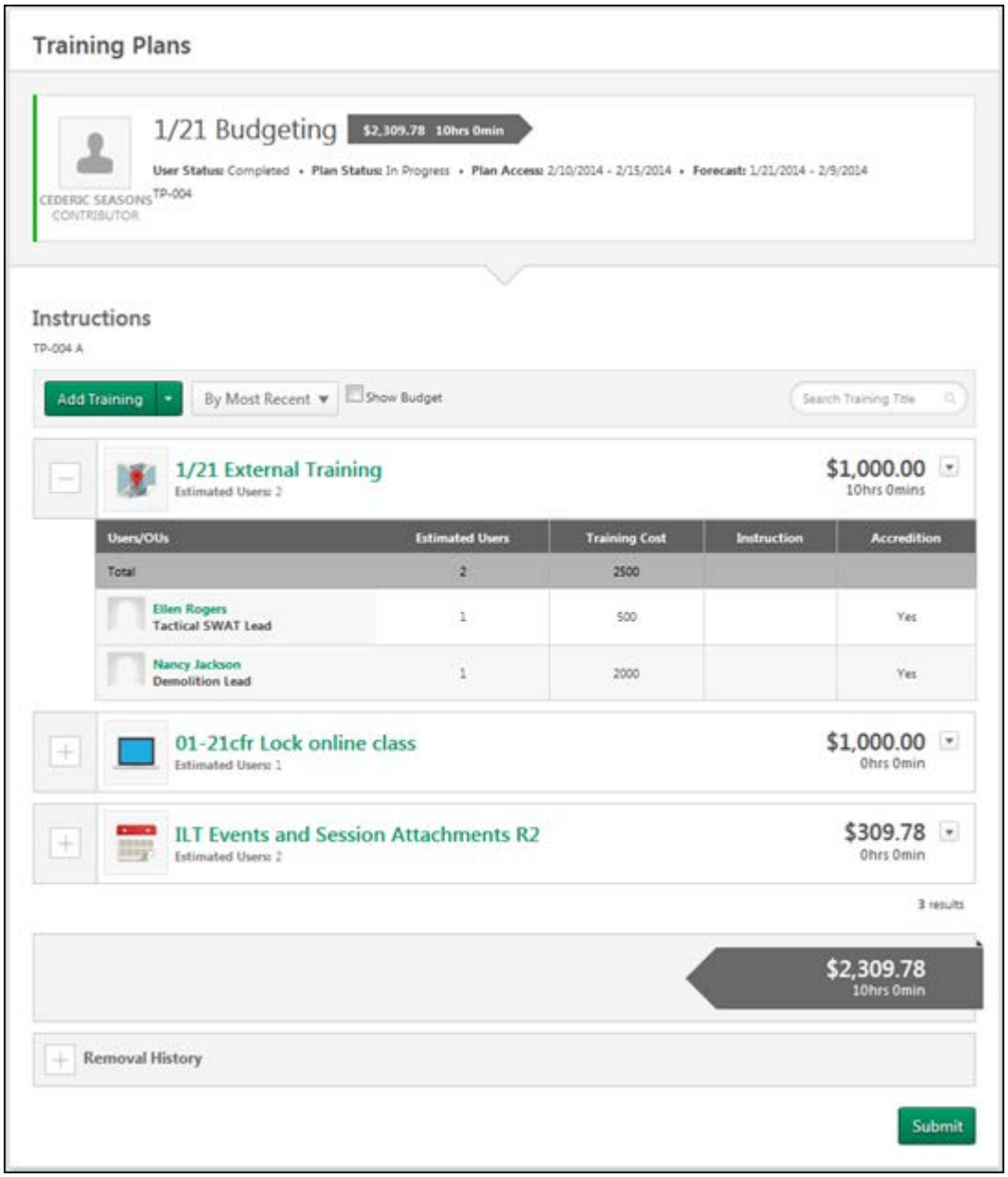
- User or Organizational Unit (OU) Name
- Estimated Users
- Approval Status
- Denial Comments
- Custom Field Data

If the new Plan Contributor (Manager) already has existing training needs, then the newly inherited users and their training needs are automatically added to the existing training plan. The total costs and hours are automatically updated to include the inherited training needs.

User Moves to New Training Plan

If a user within a training plan moves into a new OU that is not included in the Training Plan Availability, then any training needs that have been identified for the user are deleted and cannot be restored. For example, if a user moves to a new position for which training needs are not planned or are planned in a separate training plan, then the user's existing training needs are deleted and they are not transferred to another training plan.

When a new user is created in the system and is automatically added to an existing training plan, the user is not added to any existing training needs. However, the plan contributor can choose to add the new user to existing or new training needs.



On-hold Training Needs Considerations

- If a user is deactivated, all of their training plan needs are deleted. If a user is deleted and added again, the needs are deleted and cannot be restored.
- The custom fields always save the value from the previous Plan Contributor (Manager).
- After the Plan Expiration date, the on-hold training needs are no longer restored. The page is accessible and non-modifiable.

Restoring Considerations

- The new Plan Contributor (Manager) should initially exist in the Training Plan/Plan Contributor Segment to be able to receive the on-hold needs.

- OUs needs are not restored. This requires manual action from the Training Plan Administrator.
- After the Plan Expiration date, no automatic movements occur anymore.
- The Training Hours and Costs are always updated with the new Plan Contributor (Manager) LO details availability (including currency).
- The OU's default number of users is not recalculated after new users have been added to new Plan Contributors (Managers). This is only applicable if planning for OUs.

Web Services - Learning

Enhanced Certification Transcript Web Service (SOAP)

With this enhancement, the following fields are now included in the Certification Transcript web service response:

- Certification Status - This returns the user's status for the certification.
- Earned Credits (within Section Item) - This returns the user's earned credits for the certification section.

The status element within the CertSection element is now represented as null "<Status />" instead of <status> Not Completed<status>. This is because there is not a status within a certification section.

The Web Service Definition Language (WSDL) is updated to reflect this new element in the request.

An administrator must have permission to view the user and 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.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 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

Enhanced LO - Complete Web Service (SOAP)

With this enhancement, the following field is now included in the LO - Complete web service request for online courses and tests:

- Score - This field is used to determine a pass or fail status for the learning object (LO).

The Web Service Definition Language (WSDL) is updated to reflect this new element in the request.

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.

Get Details Web Service (REST)

With this enhancement, a new Get Details REST web service is now available. This web service provides standard and custom field data for a learning object (LO) via REST Web Services.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
Actor ID	String	This is optional. This is the User ID of the administrator who is requesting the data.
Object ID	String	This is required. This is the ID of the LO for which the administrator is requesting data.

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.

Global Search (LO) Web Service (REST)

With this enhancement, a new Global Search (LO) REST web service is now available. This web service provides a list of training courses based on specific parameters via REST Web Services.

An administrator must have permission to view and update the Course Catalog.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
Title	String	This is optional. This field enables the web service to retrieve learning objects by title.
Description	String	This is optional. This field enables the web service to retrieve learning objects by description.
Training Type	Enum	This is optional. This field enables the web service to retrieve learning objects by training type. Multiple LO types should be separated by commas. The following options are available: o Course - This refers to online classes o SCO - This refers to quick courses o Curriculum o Library o Material o Test o Event o Video o SocialLearningProgram - This refers to programs
Subject	String	This is optional. This field enables the web service to retrieve learning objects by subject.
Provider	String	This is optional. This field enables the web service to retrieve learning objects by provider.
Languages	String	This is optional. This field enables the web service to retrieve learning objects by language.
Skills	String	This is optional. This field enables the web service to retrieve learning objects by skill.
Location	String	This is optional. This field enables the web service

DATA FIELD	TYPE	DESCRIPTION
		to retrieve learning objects by location.
Competency	String	This is optional. This field enables the web service to retrieve learning objects by competency.
Instructor	String	This is optional. This field enables the web service to retrieve learning objects by instructor ID.
From Date	Date/Time	This is optional. This is the start of the time frame during training items may start. The required format is YYYY-MM-DD
To Date	Date/Time	This is optional. This is the end of the time frame during training items may start. The required format is YYYY-MM-DD
OU ID	String	This is optional. This field enables the web service to retrieve learning objects by OU ID.
OU Type	String	This is optional. This field enables the web service to retrieve learning objects by OU type.
User ID	String	This is optional. This field enables the web service to retrieve learning objects by user ID.
Page Number	Number	This is optional. Each page number represents a batch of up to 25 records. If this value is not present or if it is set to 1, then the first 25 records are returned. If this is set to 2, then the next 25 transcript records are returned (26-50).

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 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,	Learning - Administration

	Training Item, Provider, ILT Provider, User's ILT 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

Transcript and Task Web Service (REST)

With this enhancement, a new Transcript and Task REST web service is now available. This web service provides transcript and task data for users via REST Web Services. The service can return all transcript information for a user or only information for a specific learning object (LO).

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
User ID	String	This is required. This is the user ID of the user whose transcript information is being requested.
LO ID	Enum	This is optional. This is the ID of a specific LO. When this is specified, the web service returns information on a specific LO.

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.

Transcript Search Web Service (REST)

With this enhancement, a new Transcript Search REST web service is now available. This web service provides transcript data for users based on a provided transcript status within a specified time period via REST Web Services.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
LO Type	String	This is optional. This field enables the web service to retrieve learning objects by type.
Modification Start Date	String	This is optional. This is the start of the time frame during which transcript modifications are retrieved. A maximum time frame of 24 hours can be specified. The required format is YYYY-MM-DDTHH:MM:SS
Modification End Date	String	This is optional. This is the end of the time frame during which transcript modifications are retrieved. A maximum time frame of 24 hours can be specified. The required format is YYYY-MM-DDTHH:MM:SS
Status	String	This is required. This field enables the web service to retrieve learning objects by status.
User ID	String	This is optional. This is the User ID of the user for whom the transcript data is being retrieved.
Page Number	String	This is optional. Each page number represents a batch of up to 50 transcript records. If this value is not present or if it is set to 1, then the first 50 records are returned. If this is set to 2, then the next 50 transcript records are returned (51-100).

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.

Increase Character Limit for Question User Comment

With this enhancement, when running Form Management Custom Reports or Onboarding Custom Reports, the character limit for the **Question User Comment** field is increased from 500 to 1200. The field appears in the Form Template section of these reports.

Prior to this enhancement, any part of a user's responses that went over 500 characters did not display in the report output.

Related April '16 Enhancement Note: *As part of a separate enhancement for the April '16 release, the name of the Form Template section is changing to Training Form Template. In addition, the permission names are changing.* *See* **Form Management Custom Report** on page 524 *for additional information.*

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

(missing or bad snippet)(missing or bad snippet)

LO Availability and Added Fields in Learning

With this enhancement, Learning fields are added to multiple sections of custom reports.

In addition, the availability criteria defined on the Availability tab in the Course Catalog can now be reported on in custom reports. The following fields are added to the Training section to report on availability in custom reports:

- Availability Type
- Training Availability
- Training Availability Include Subordinates
- Training Availability Pre-Approved
- Training Availability Register Upon Approval
- Training Request Form

Certifications Fields

The following field is added to the Certifications section:

In addition, certification fields are updated to display current and past versions of the certification for a user, as well as the status.

Training Fields

The following fields are added to the Training section:

Transaction Fields

The following fields are added to the Transaction section:

Transcript Fields

The following fields are added to the Transcript section:

Mobile

Apply with Mobile - Pre-screening Questions

Prior to this enhancement, if pre-screening questions were included in an application process, applicants could not fully complete the application using the mobile application. As a result, applicants were required to finished the application using the web application.

With this enhancement, pre-screening questions can now be completed using the mobile application, which enables more applicants to complete applications using the mobile application.

All pre-screening questions that are supported on the web application are supported on mobile devices, including True/False, Yes/No, Multiple choice, text input, and essay.

If a user completes and saves a section, such as the Pre-screening section, within the application workflow on the web application or on a mobile device, the applicant can return and complete the application on a different device.

Use Cases

1. John wants to apply for a job at a retail store. While he is at the store, he sees a link to their career site.
2. When he accesses the career site, it is mobile enabled. John finds the position to which he wants to apply and starts the application.
3. John is prompted to complete some multiple choice pre-screening questions.
4. After answering the questions, John adds his resume and then submits his application.
5. The application is now visible to the recruiter at the retail store.

Considerations

Applicants must complete all of the pre-screening questions within the application in order for their responses to be saved. If the applicant exits the application before answering all of the questions, then their responses will not be saved.

Forms and assessments cannot be completed using the mobile application. As a result, mobile users cannot fully complete an application that includes forms or assessments.

Implementation

This functionality is automatically enabled for career sites that have enabled a mobile site.

Apply with Mobile - Upload Document

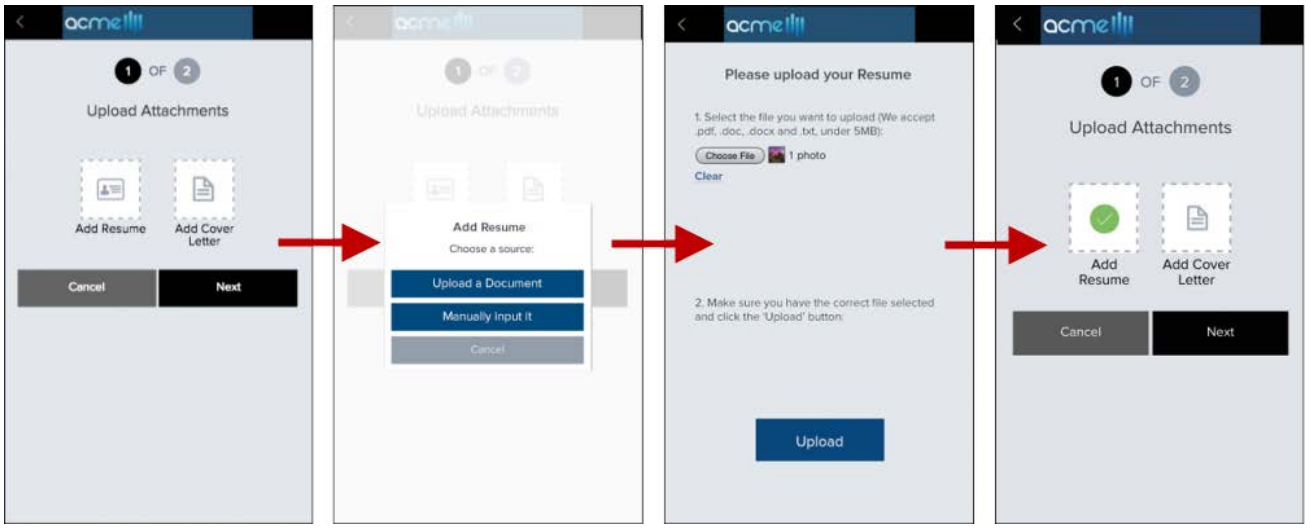
Prior to this enhancement, applicants could not upload documents when applying for a position using the mobile application. As a result, applicants were required to manually enter their resume or cover letter information using their mobile device.

With this enhancement, applicants can now upload documents to their application, such as resumes and cover letters. Users can upload documents using Box, Dropbox, Google Drive, or iCloud. Applicants with a Windows device can upload documents using OneDrive.

The file size limit is 5MB, and the following file types are supported:

- .pdf
- .doc
- .docx
- .txt

Workflow



Use Cases

1. Sandra visited a career fair. While at the career fair, she decided to apply for a position using her mobile device.
2. Sandra visits the career site and clicks the URL for the position. She sees a section to upload a resume and a cover letter.
3. Because she already has an up-to-date resume and cover letter on her Dropbox account, she is able to quickly upload these documents from Dropbox to her application.
4. After uploading the documents, she completes and submits the application from her mobile device.

Considerations

Applicants must have the latest operating system (OS) installed on their mobile device.

Because applicants are uploading documents from a file management tool (e.g., Dropbox, Google Drive), applicants must have a file management tool installed on their mobile device in order to use this functionality.

Documents that are uploaded via a mobile device are not parsed.

Additional attachments beyond a resume and cover page cannot be uploaded.

Implementation

This functionality is automatically enabled for career sites that have enabled a mobile site.

Performance

Custom Employee Relationships in Performance

Custom Employee Relationships in Performance

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

With this enhancement, custom relationships can constrain the Snapshot - Development Plans, Snapshot - Reviews, Snapshot - Competencies, and Feedback - View and Post permissions using the custom employee relationships defined in their portal. These constraints can be applied to either individual permissions or as general constraints within a security role.

Use Case

Lisa is a Quality Manager at a manufacturing plant, and she is looking to identify and improve performance issues with employees at her manufacturing plant. She is able to view the Snapshot: Reviews page for employees at her manufacturing plant, which enables her to review users' performance reviews scores. She is also able to view the Snapshot: Development Plans page to view the progress of employees' development plans to see how they are progressing in their development.

Considerations

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

Implementation

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

Glossary

- Employee Relationship - This refers to any custom relationship that is defined within the system. These employee relationships enable organizations to customize workflows in the system to match their organizational needs. Examples of custom employee relationships are Human Resources Business Partners or Tertiary Managers.

Security

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

Goals Redesign Enhancements

Goals Redesign Enhancements

With this enhancement, the following enhancements have been made to the redesigned Goals functionality:

- SMART Goal Wizard - This wizard is now available for organizations using the redesigned Goals functionality. The appearance of the wizard is improved, but the functionality is not changed.
- Total Goal Weight - Administrators can now configure Goal Preferences so that the total weight for all of a user's goals cannot exceed 100% for the current goal period.
- View Details for Manager Goals and Alignable Goals - Administrators can now prevent users from viewing goal Progress, Comments, and Attachments of manager goals and goals that are available for alignment.
- Universal Profile: Actions - When a user manages a goal from the Universal Profile: Actions page, the user is able to manage the goal from within the Actions space. Previously, users were directed to the Snapshot space, which was an issue for organizations that did not have Snapshot enabled.
- Copy Details when Aligning - When aligning with another goal, users now have the option to copy the details of the goal to their new goal.
- Goal Status Drop-down - If the Progress field is disabled and a goal has no tasks or targets, users can now update the goal status using a drop-down menu on the Manage Goals page.

Implementation

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

All organizations using the Goals functionality will be automatically upgraded to the redesigned Goals functionality with the April 2016 Release.

Security

The following existing permissions apply to this functionality:

Goal Preferences - General

With this enhancement, an additional option is now available in the General section of the Goal Preferences page.

This enhancement is only available to organizations using Redesigned Goals functionality.

To manage Goal Preferences, go to ADMIN > TOOLS > PERFORMANCE MANAGEMENT > GOAL PREFERENCES.

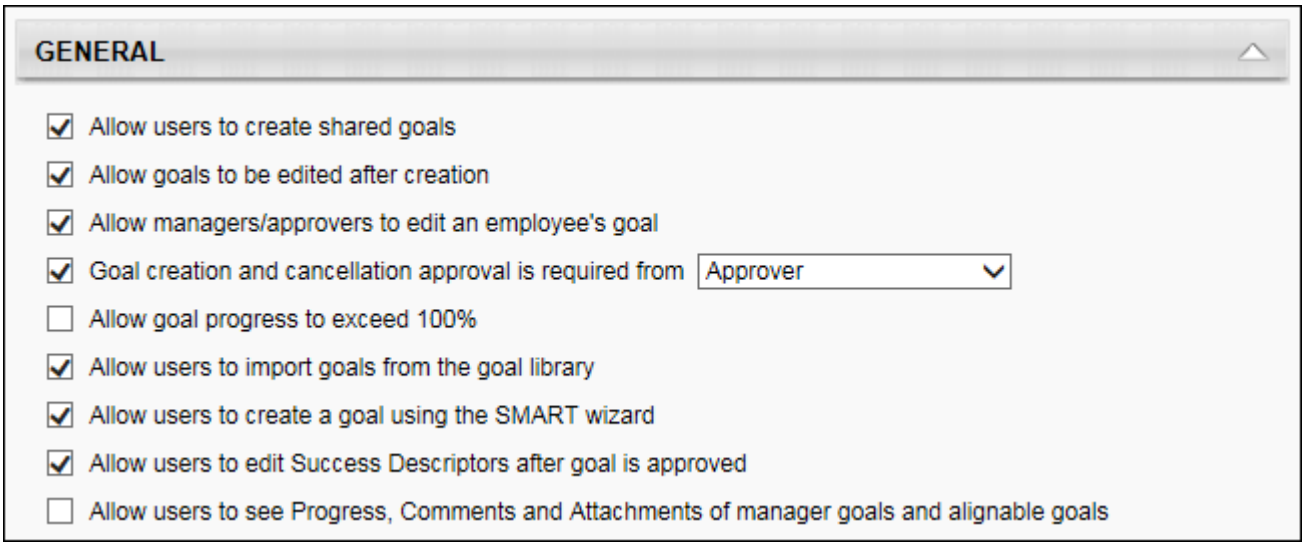
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Goal Preferences - Manage	Grants ability to manage Goal Preferences, where various goal features can be enabled or disabled according to the needs of the organization. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

Allow users to see Progress, Comments and Attachments of manager goals and alignable goals

This option is unselected by default. Select this option to allow users to view Progress, Comments, and Attachments for any of the user's manager's goals and all goals with which the user can align. For example, an organization may choose to prevent users from viewing this information in order to preserve privacy in some higher-level objectives as well as any private status comments that may be added to a goal.

When this option is not selected, users are not able to view goal progress and any comments or attachments that are added to their manager's goals and any available goal with which the user is able to align.



Goal Preferences - Time Periods

With this enhancement, an additional option is now available in the Time Periods section of the Goal Preferences page.

This enhancement is only available to organizations using Redesigned Goals functionality.

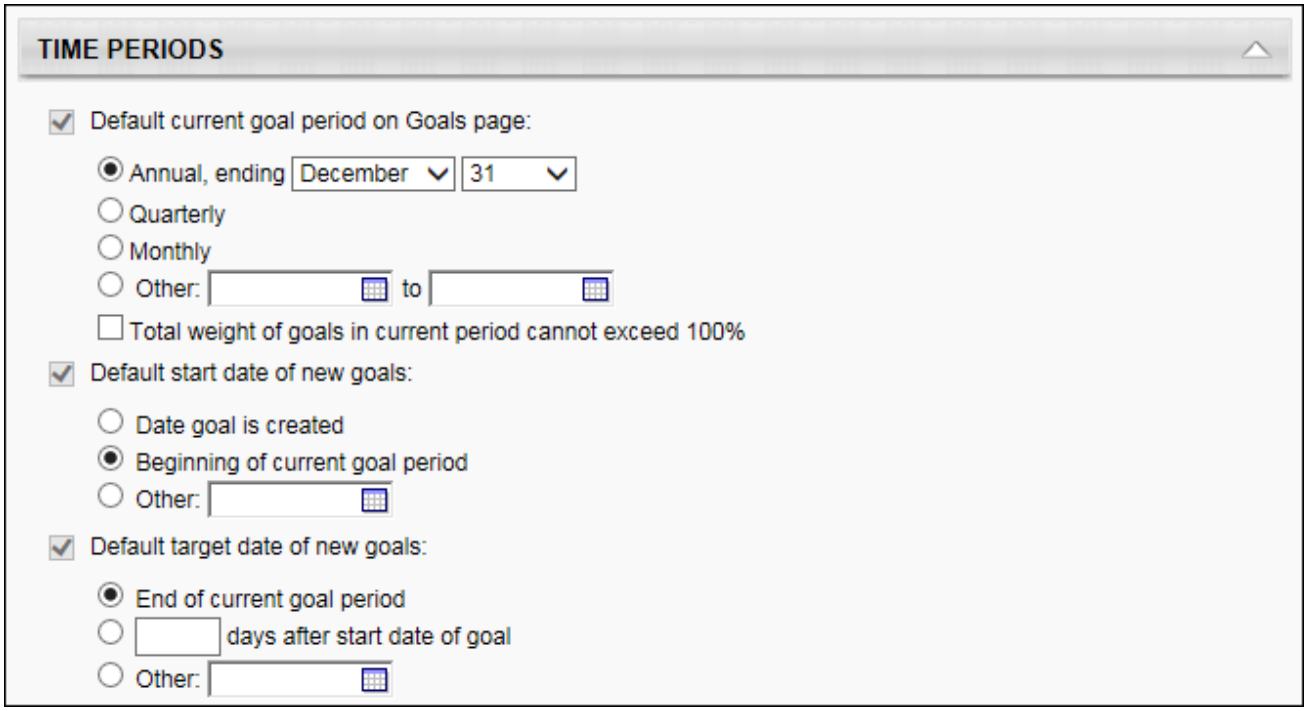
To manage Goal Preferences, go to ADMIN > TOOLS > PERFORMANCE MANAGEMENT > GOAL PREFERENCES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Goal Preferences - Manage	Grants ability to manage Goal Preferences, where various goal features can be enabled or disabled according to the needs of the organization. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

The following option is now available within the **Default current goal period on Goals page** option:

- **Total weight of goals in current period cannot exceed 100%** - This option is unchecked by default. When this option is selected, users cannot set goal weights so that the total weight of all goals for the current period cannot be more than 100%. By limiting total goal weight for the current period, administrators can ensure goal weights are aligned with employee review processes where stretch goals are not common.



Goal - Create - Wizard

When creating a goal, the SMART Wizard guides users through the goal creation process, helping them to create specific, measurable, actionable, relevant, and timely goals.

Prior to this enhancement, the SMART Wizard was not available to organizations using the redesigned Goals functionality.

With this enhancement, the SMART Wizard is now available to organizations using the redesigned Goals functionality.

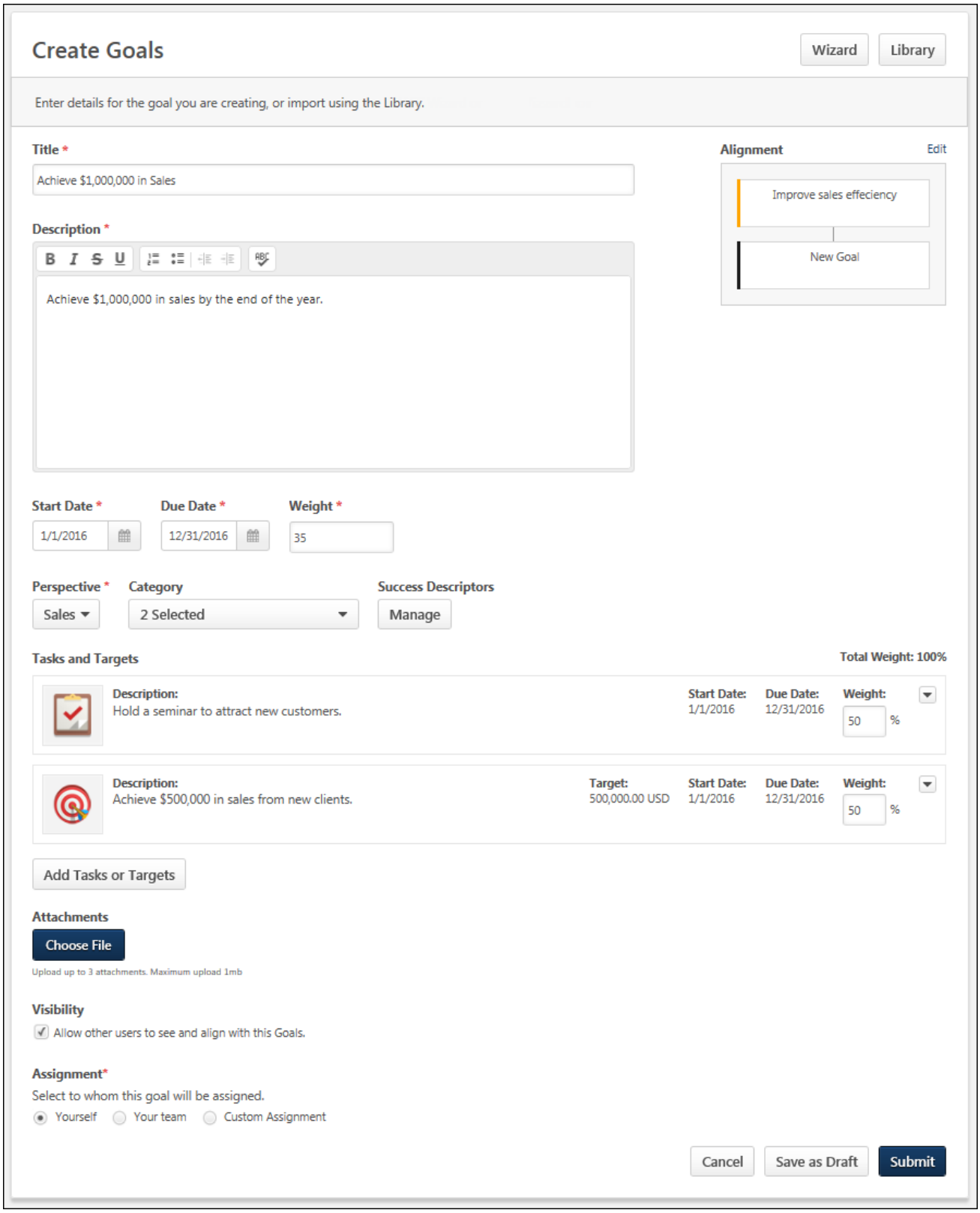
A **WIZARD** button is now available in the upper-right corner of the Create Goals page.
Note: *The SMART Wizard is only available to users if it is enabled by the administrator in Goal Preferences.*

To create a goal, go to PERFORMANCE > GOALS. Then click the **CREATE** button.

To edit a goal, go to PERFORMANCE > GOALS. Click the Actions menu icon to the right of the appropriate goal and select Edit.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Goals - Create	Grants ability for user to create goals for self (and direct and indirect reports if a manager). The permission constraints determine for whom the user can create goals. This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance


Create Goals
Wizard
Library
Enter details for the goal you are creating, or import using the Library.
Title *
Achieve $1,000,000 in Sales
Alignment
Edit
Improve sales effeciency
New Goal
Description *
Achieve $1,000,000 in sales by the end of the year.
Start Date *
1/1/2016
Due Date *
12/31/2016
Weight *
35
Perspective *
Sales
Category
2 Selected
Success Descriptors
Manage
Tasks and Targets
Total Weight: 100%
Description:
Hold a seminar to attract new customers.
Start Date:
1/1/2016
Due Date:
12/31/2016
Weight:
50
%
Description:
Achieve $500,000 in sales from new clients.
Target:
500,000.00 USD
Start Date:
1/1/2016
Due Date:
12/31/2016
Weight:
50
%
Add Tasks or Targets
Attachments
Choose File
Upload up to 3 attachments. Maximum upload 1mb
Visibility
Allow other users to see and align with this Goals.
Assignment*
Select to whom this goal will be assigned.
Yourself
Your team
Custom Assignment
Cancel
Save as Draft
Submit

Goal - Create Using SMART Wizard

With this enhancement, the appearance of the wizard is improved, but the functionality of the wizard is unchanged.

The SMART Wizard guides users through the goal creation process, helping them to create specific, measurable, actionable, relevant, and timely goals. The SMART Wizard contains five sections that cover the different aspects of the goal. Each section must be completed in order.

If any information is entered on the Create Goal page before opening the SMART Wizard, then that information is automatically pre-populated in the SMART Wizard.

To create a goal, go to PERFORMANCE > GOALS. Then click the **CREATE** button.

To create a goal using the SMART Wizard, click the **WIZARD** button in the upper-right corner of the Create Goals page.

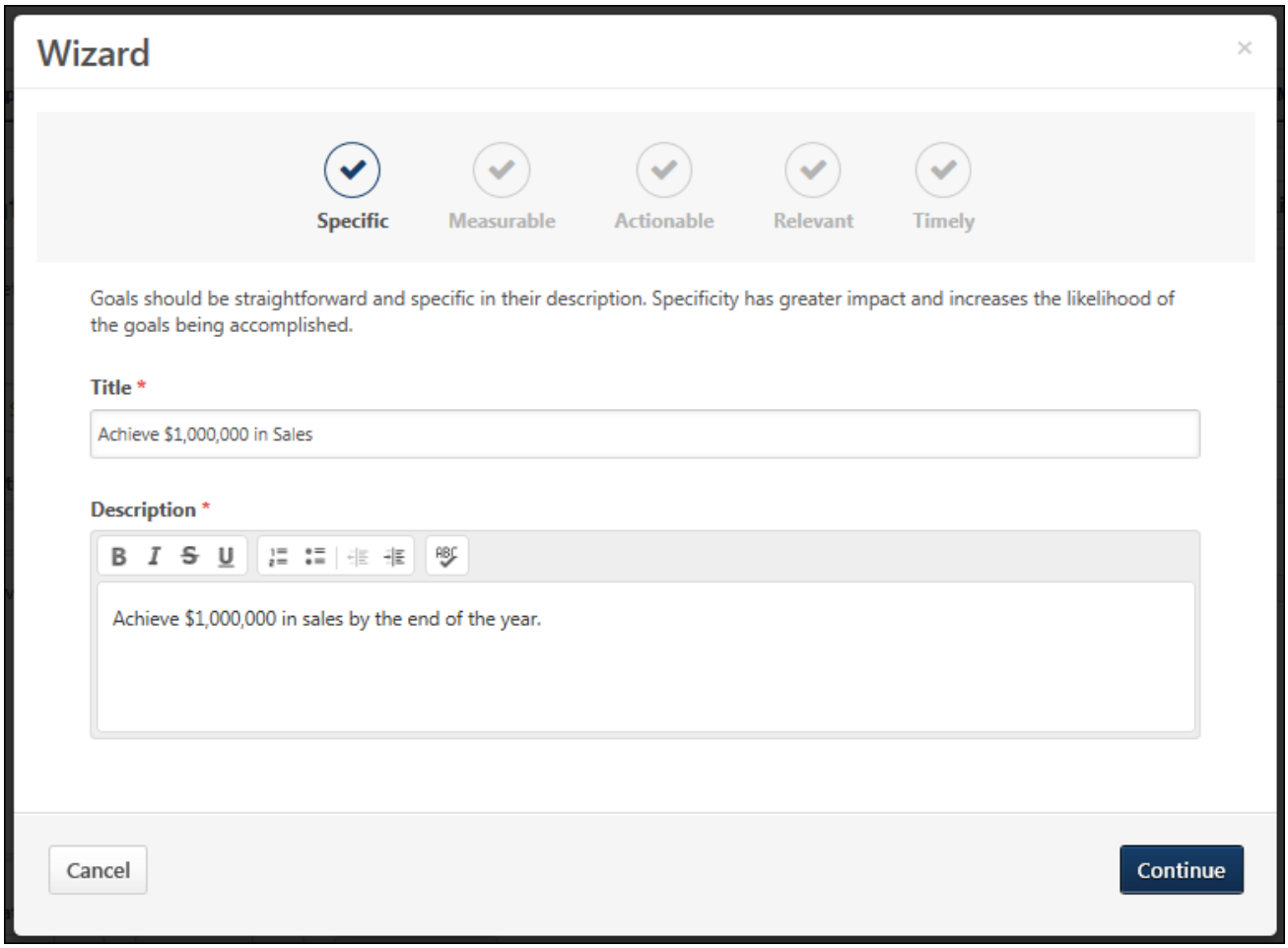
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Employee Goals - Align	When creating a goal for users other than self or subordinates, this permission allows administrators to align the goal with other goals. The constraints on this permission determine with which employees the administrator can align the goal. This permission works in conjunction with the Create Employee Goals permission. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Performance - Administration
Goals - Create	Grants ability for user to create goals for self (and direct and indirect reports if a manager). The permission constraints determine for whom the user can create goals. This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

Specific

In this section, you will enter a clear and meaningful title and description for your goal.

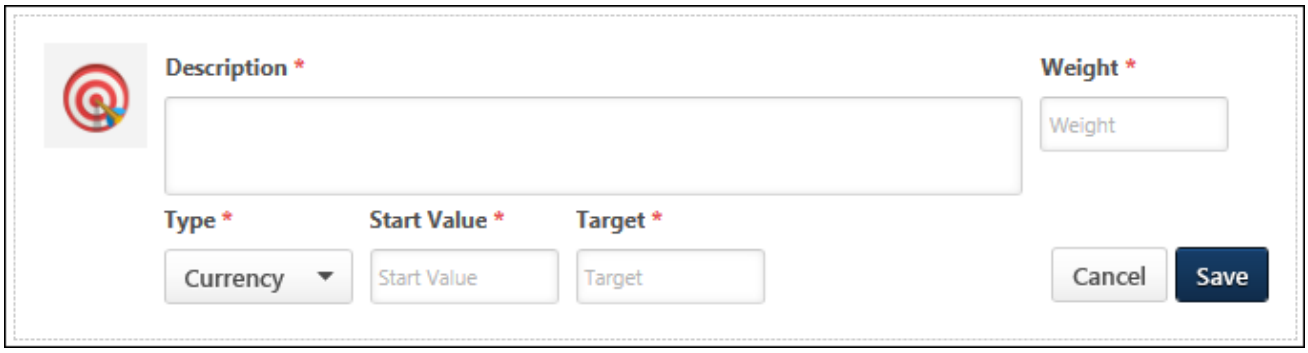
- **Title** - Enter the title for your goal that will appear on the My Goals page as well as anywhere else your goal is visible. This field is limited to 1,000 characters.
- **Description** - Enter an overview of the goal, including any objectives or parameters. This field can be formatted using the text formatting buttons and is limited to 10,000 characters.



Measurable

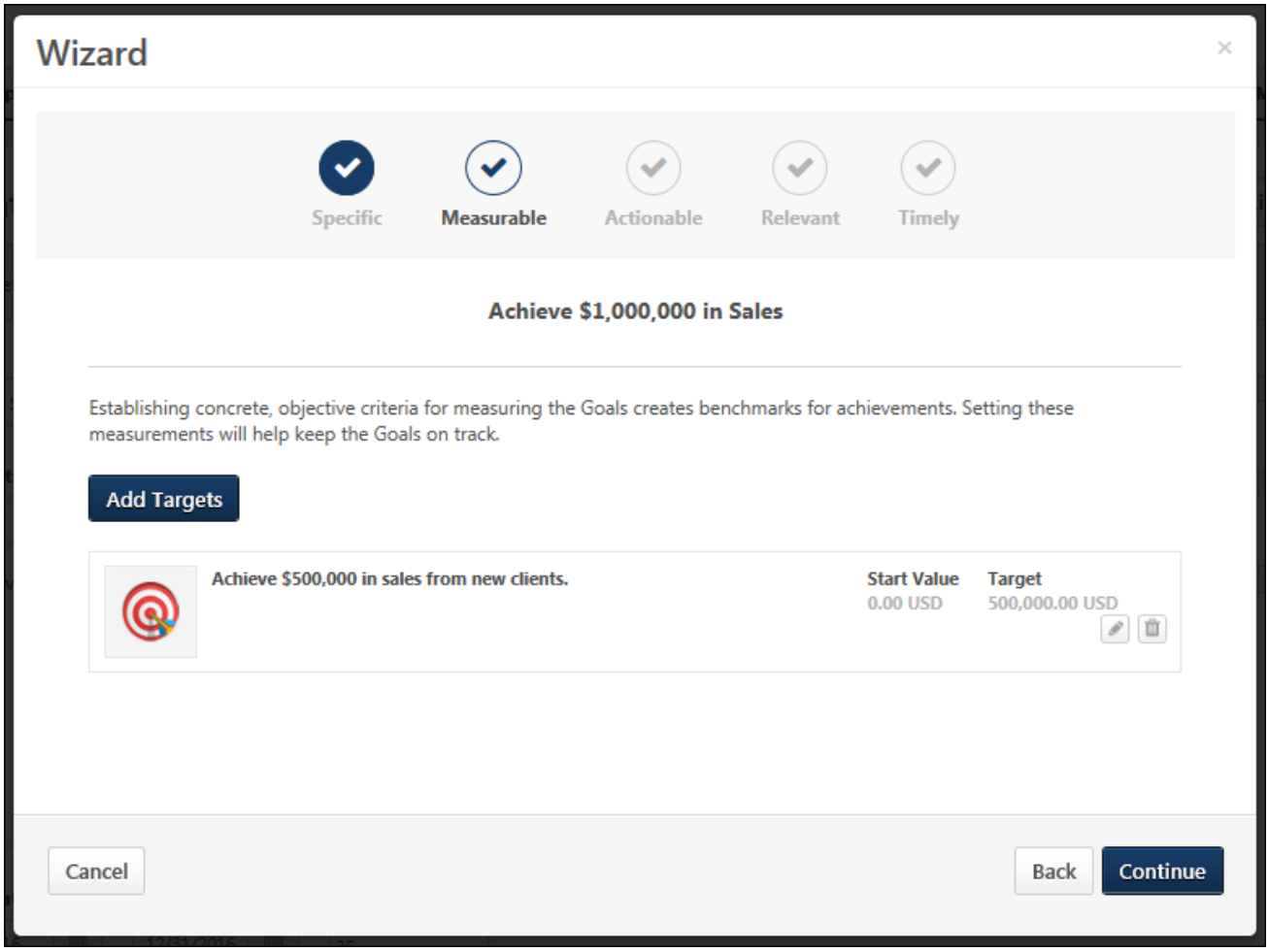
In this section, you will make your goal measurable by adding quantifiable targets, which will help to make sure your goal remains on track for completion.

To add a target to the goal, click the **ADD TARGETS** button. *See Goal - Create/Edit - Add Task Target (New Design).*



To edit a target, click the Edit icon to the right of the appropriate target.

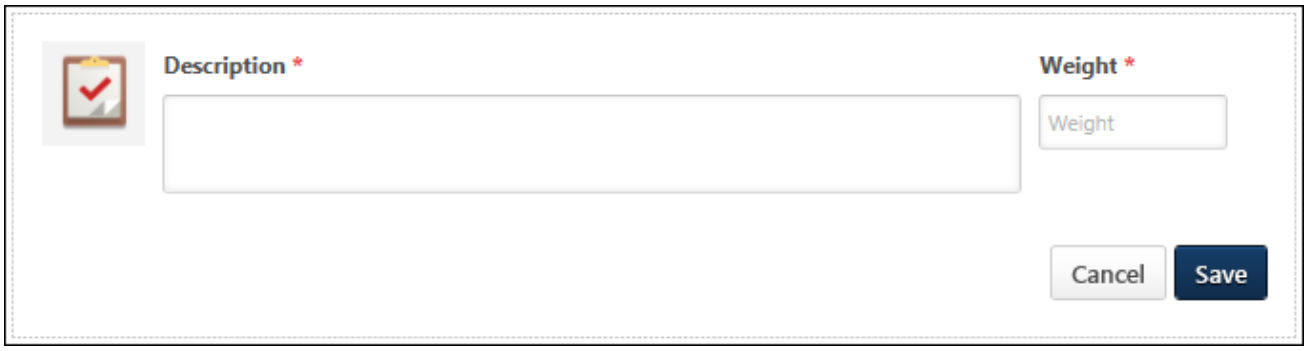
To delete a target, click the Delete icon to the right of the appropriate target.



Actionable

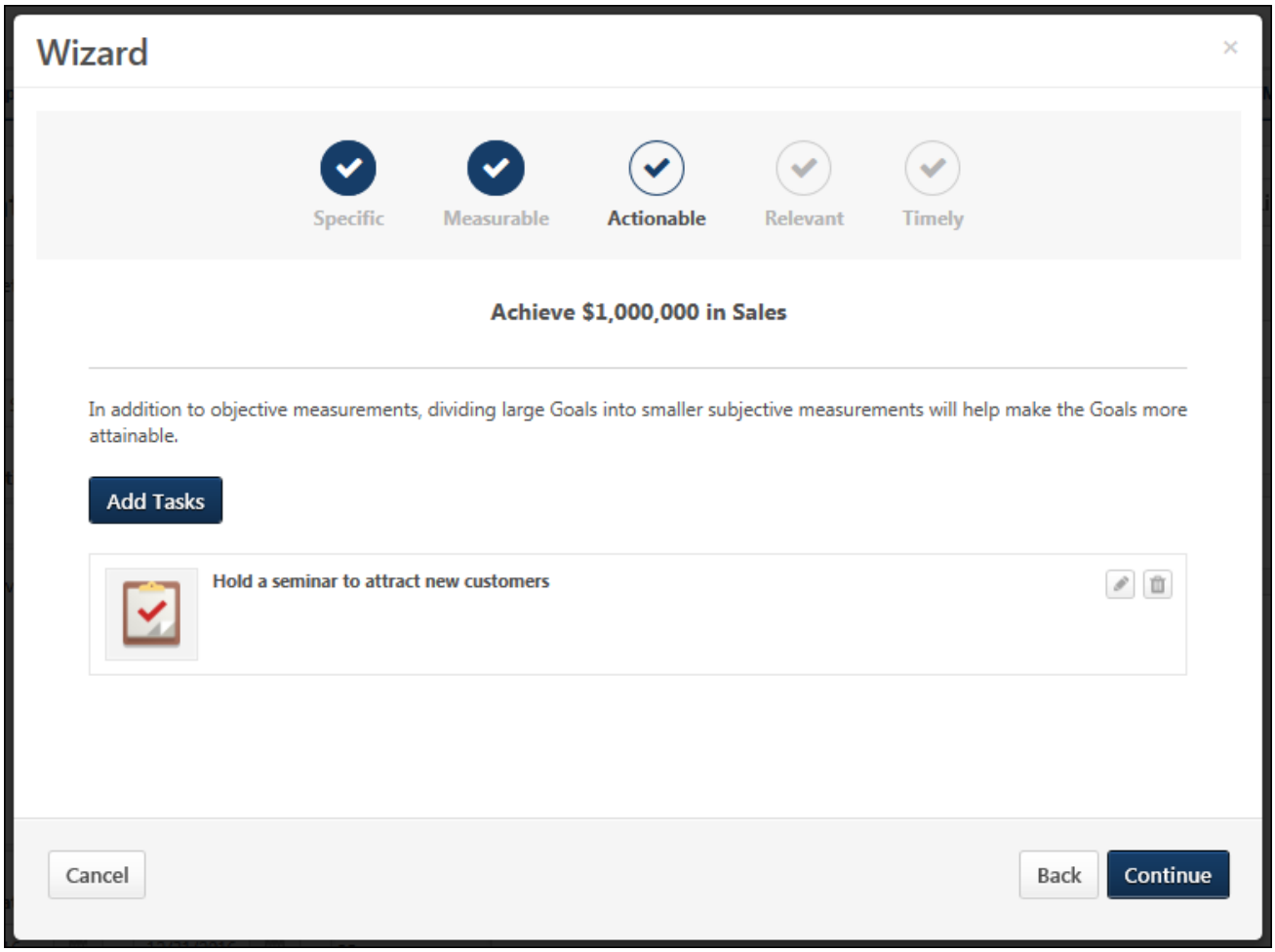
In this section, you will make your goal actionable by adding tasks, which will help to make sure you are taking the right steps to complete your goal.

To add a task to the goal, click the **ADD TASKS** button. *See Goal - Create/Edit - Add Task Target (New Design).*



To edit a task, click the Edit icon to the right of the appropriate task.

To delete a task, click the Delete icon to the right of the appropriate task.

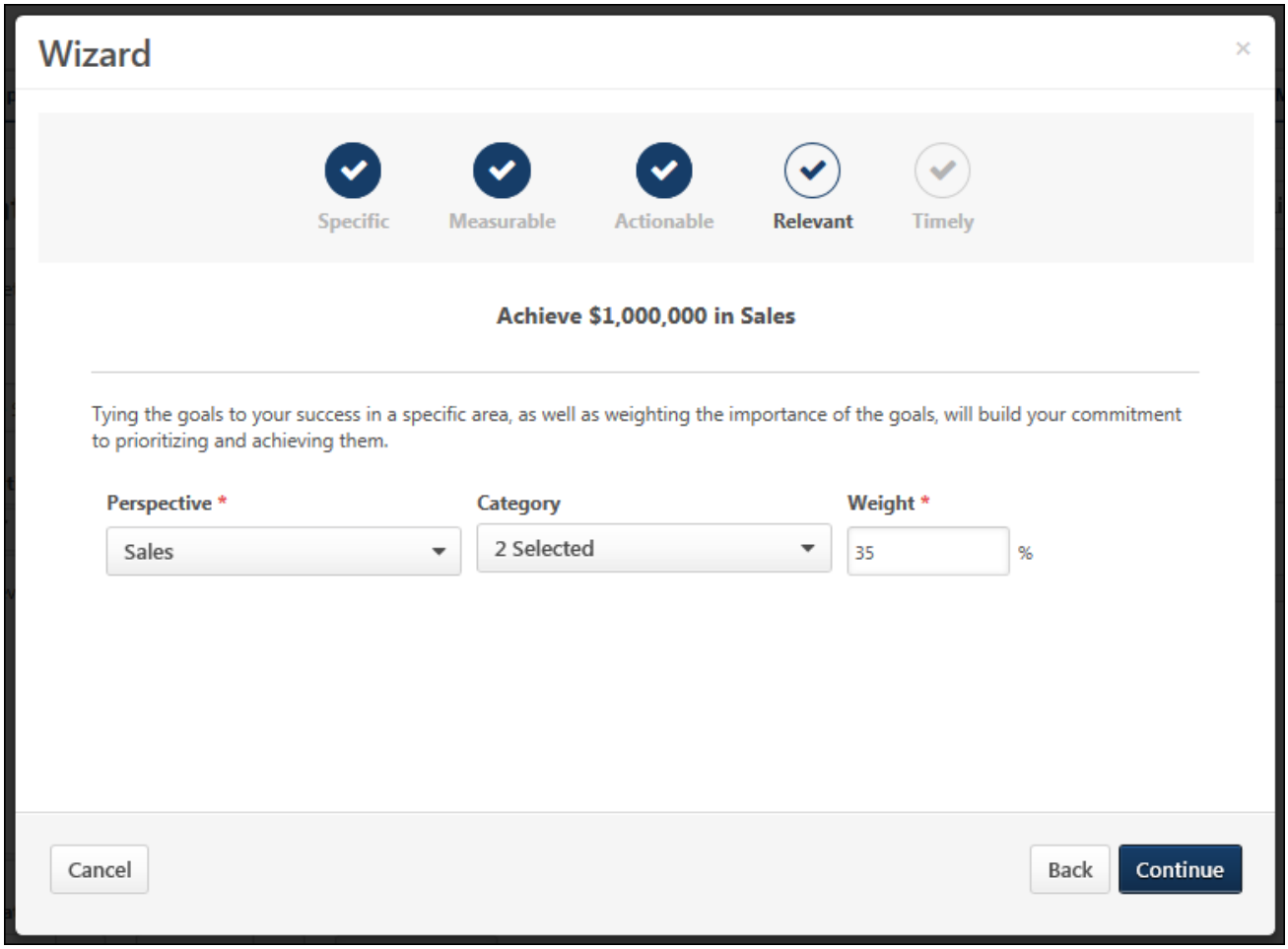


Relevant

In this section, you will associate your goal with certain aspects of the company and weigh its importance.

- **Perspective** - From the drop-down menu, select a perspective. The perspective is used to specify to which aspect of the organization your goal relates. A goal can only be associated with one perspective. Perspectives are defined by system administrators.
- **Category** - From the drop-down menu, select all categories that are appropriate for your goal. Categories are used to further define the type of goal you are creating. A goal can have multiple categories. Categories are defined by system administrators.
- **Weight** - Enter a weight for your goal between 0 and 100. Weighting allows you to place a greater value on certain goals. For example, if you have four goals for a review period and they are valued equally, you should assign them each a weight of 25%. Similarly, if one goal is more important than the others, you may give that goal a weight of 40% and assign the other three a weight of 20%. The heavier weighted goal will count more

towards your overall goal progress than the other three. Depending on a backend setting, the weight percentage field may accept up to two decimal places.

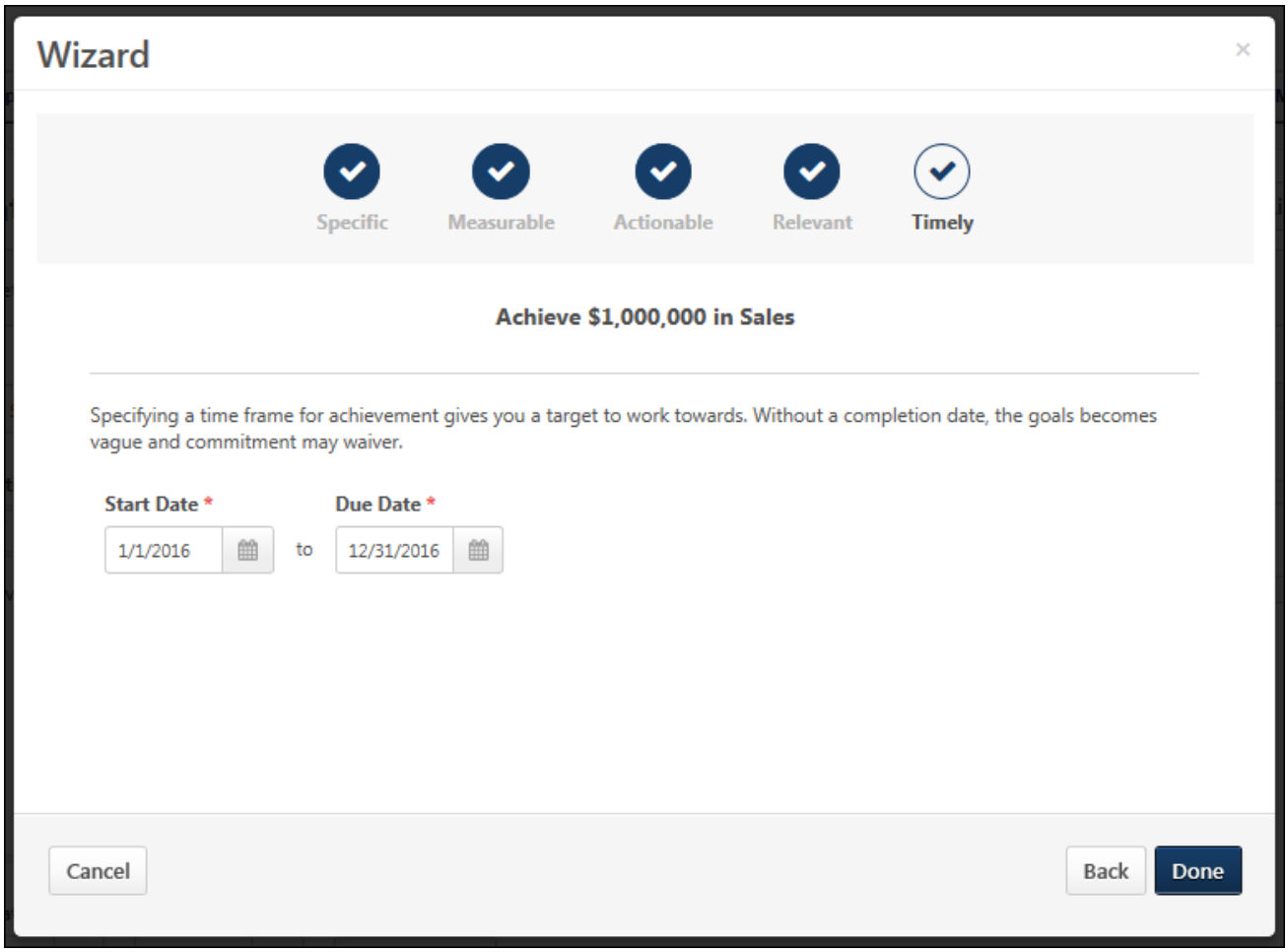


Timely

In this section, you will specify a time frame for achieving your goal.

- **Start Date and Due Date** - Click the Calendar icon to select the date on which the goal should be started and the date by which the goal should be completed. The Start Date must be before the goal Due Date. If this goal is being aligned to another goal, these dates must be within the Start and Due Date of the parent goal. When you view your goals or run goal related reports, the Start Date and Due Date are used to determine which goals are included. If any part of a goal falls within the specified time frame, the goal will display.

Click **DONE** to finish the Wizard and create the goal. The information you added is now included in the Create/Edit Goal screen. *See Goal - Create/Edit (New Design).*


Wizard
Specific
Measurable
Actionable
Relevant
Timely
Achieve $1,000,000 in Sales
Specifying a time frame for achievement gives you a target to work towards. Without a completion date, the goals becomes vague and commitment may waiver.
Start Date *
Due Date *
1/1/2016
to
12/31/2016
Cancel
Back
Done

Universal Profile - Actions - Manage Goal

Prior to this enhancement, when a user selected the Manage option for a goal within the Universal Profile - Actions page, the user was directed to the Manage Goals page within the Universal Profile - Snapshot page. For organizations that did not have Snapshot enabled, the Manage option was not available on the Actions page.

With this enhancement, when a user selects the Manage option for a goal within the Universal Profile - Actions page, the user is directed to a Manage Goals page that exists within the Actions page. This enables users to manage their goals from the Universal Profile if Snapshot is not enabled.

This functionality applies to all organizations using the redesigned Goals functionality, including those that have Snapshot enabled.

To access the Action Items, go to HOME > UNIVERSAL PROFILE. Then, click the Actions tab.

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

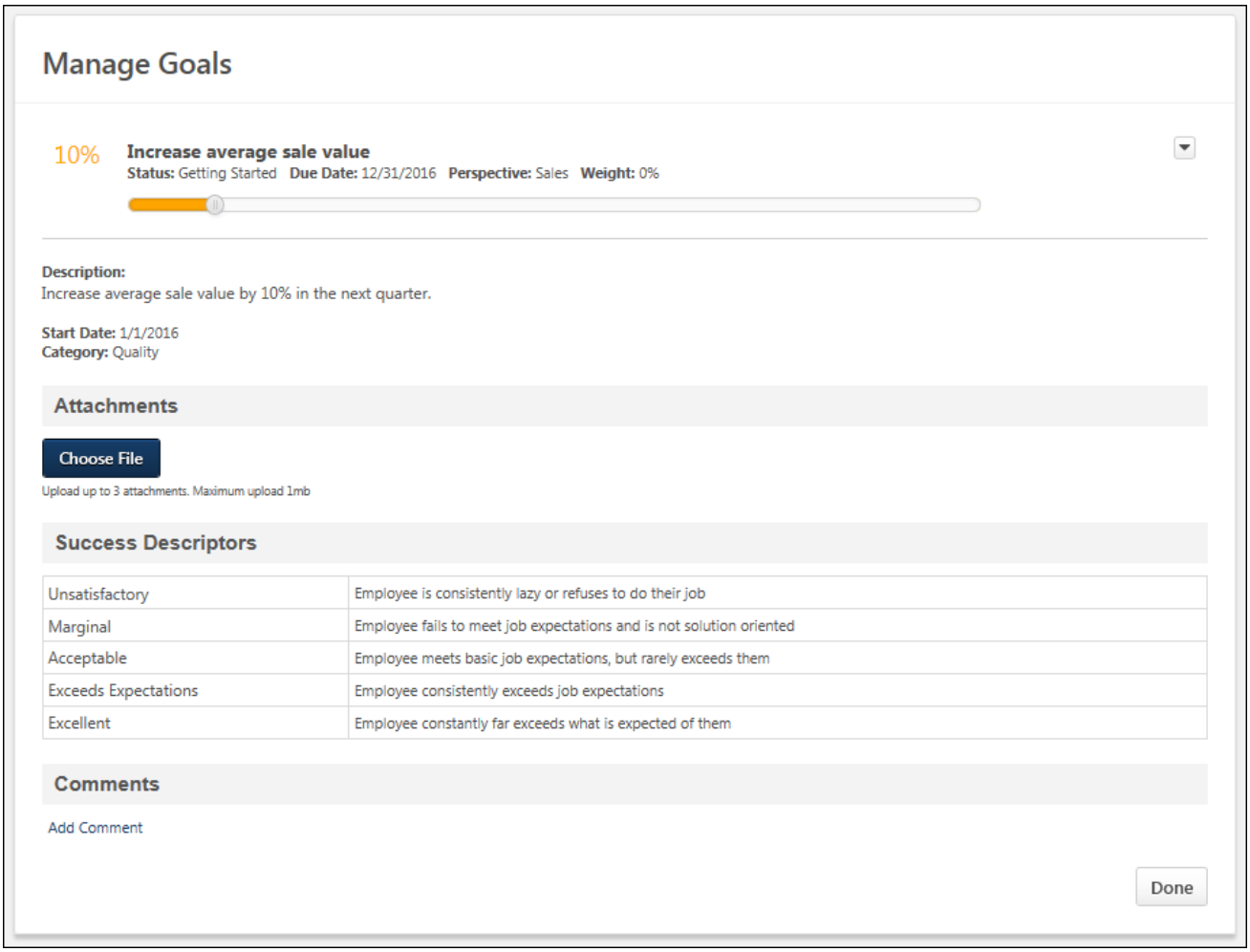
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - EPM	Grants ability to view and take action upon Performance (EPM) items on the Action Items page and in the Your Action Items widget. This permission can be constrained by OU, User's OU, User's Self, and User's Self and Subordinates. This is an end user permission.	Universal Profile
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

When a user selects the Manage option for a goal on the Universal Profile - Actions page, they are directed to a Manage Goals page.

The functionality on this page is unchanged from other Manage Goals pages.

When the user clicks the **DONE** button, they are returned to the Actions page.


Manage Goals
10%
Increase average sale value
Status: Getting Started Due Date: 12/31/2016 Perspective: Sales Weight: 0%
Description:
Increase average sale value by 10% in the next quarter.
Start Date: 1/1/2016
Category: Quality
Attachments
Choose File
Upload up to 3 attachments. Maximum upload 1mb
Success Descriptors
Unsatisfactory
Employee is consistently lazy or refuses to do their job
Marginal
Employee fails to meet job expectations and is not solution oriented
Acceptable
Employee meets basic job expectations, but rarely exceeds them
Exceeds Expectations
Employee consistently exceeds job expectations
Excellent
Employee constantly far exceeds what is expected of them
Comments
Add Comment
Done

Goal - Create - Align with Another Goal

Prior to this enhancement, administrators could configure whether or not tasks and targets were automatically inherited when a user aligned their goal with another goal. Once the user inherited the tasks and targets, they were able to edit or delete them within their own goal.

With this enhancement, users now have the option to copy certain additional details from the goal with which they are aligning to the goal they are creating or editing. When users choose to copy the goal's information, the copied information overwrites any information that may have been in the fields.

To create a goal, go to PERFORMANCE > GOALS. Then click the **CREATE** button.

To edit a goal, go to PERFORMANCE > GOALS. Click the Actions menu icon to the right of the appropriate goal and select Edit.

To align a goal with another goal, click the **ALIGN GOAL** button within the Alignment widget.

To edit the goal alignment, click the **Edit** link above the Alignment widget.

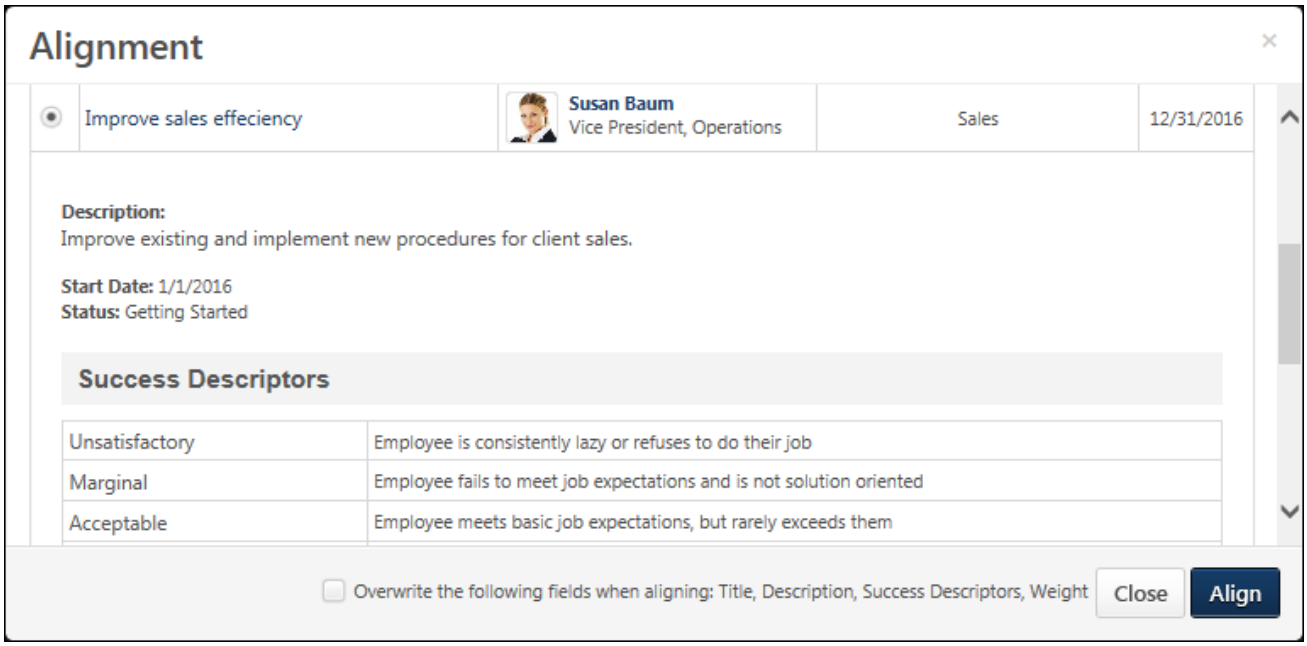
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Employee Goals - Align	When creating a goal for users other than self or subordinates, this permission allows administrators to align the goal with other goals. The constraints on this permission determine with which employees the administrator can align the goal. This permission works in conjunction with the Create Employee Goals permission. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Performance - Administration

The following option is now available within the Alignment pop-up:

Overwrite the following fields when aligning: Title, Description, Success Descriptors, Weight - When this option is selected, the Title, Description, Success Descriptors, and Weight of the selected goal will overwrite the information that you have entered for your goal once you align with the selected goal. Also, the Start Date, Due Date, and Goal Perspective are overwritten by the information from the selected goal.

- Category - The Category field is appended with categories from the aligned goal.
- Visibility - The Visibility settings are not overwritten by the aligned goal.
- Attachments - The Attachments are not overwritten by the aligned goal.


Alignment
Improve sales effeciency
Susan Baum
Vice President, Operations
Sales
12/31/2016
Description:
Improve existing and implement new procedures for client sales.
Start Date: 1/1/2016
Status: Getting Started
Success Descriptors
Unsatisfactory
Employee is consistently lazy or refuses to do their job
Marginal
Employee fails to meet job expectations and is not solution oriented
Acceptable
Employee meets basic job expectations, but rarely exceeds them
Overwrite the following fields when aligning: Title, Description, Success Descriptors, Weight
Close
Align

Goal - Create/Edit- Total Goal Weight

With this enhancement, administrators can now configure Goal Preferences so that the total weight for all of a user's goals cannot exceed 100% for the current goal period. When this setting is enabled, the total weight of all of a user's goals must be less than or equal to 100%. If a user's total goal weight is at or above 100% and the user creates a new goal, the user is able to create the goal if the goal weight is set to 0%. This enables the user to save the goal and then adjust the weights of all necessary goals.

This is enforced when creating new goals and when editing existing goals. The total goal weight limit is not enforced when a goal is saved as a draft.

Goal - Manage - Status Drop-down

Prior to this enhancement, if the **Progress** field was disabled in Goals Configuration and a goal had no tasks or targets, then there was no way for a user to update the status of their goal.

With this enhancement, if the **Progress** field is disabled in Goals Configuration and a goal has no tasks or targets, then a **Status** drop-down is available when managing the goal. Users can select one of the statuses that are configured in Goal Preferences.

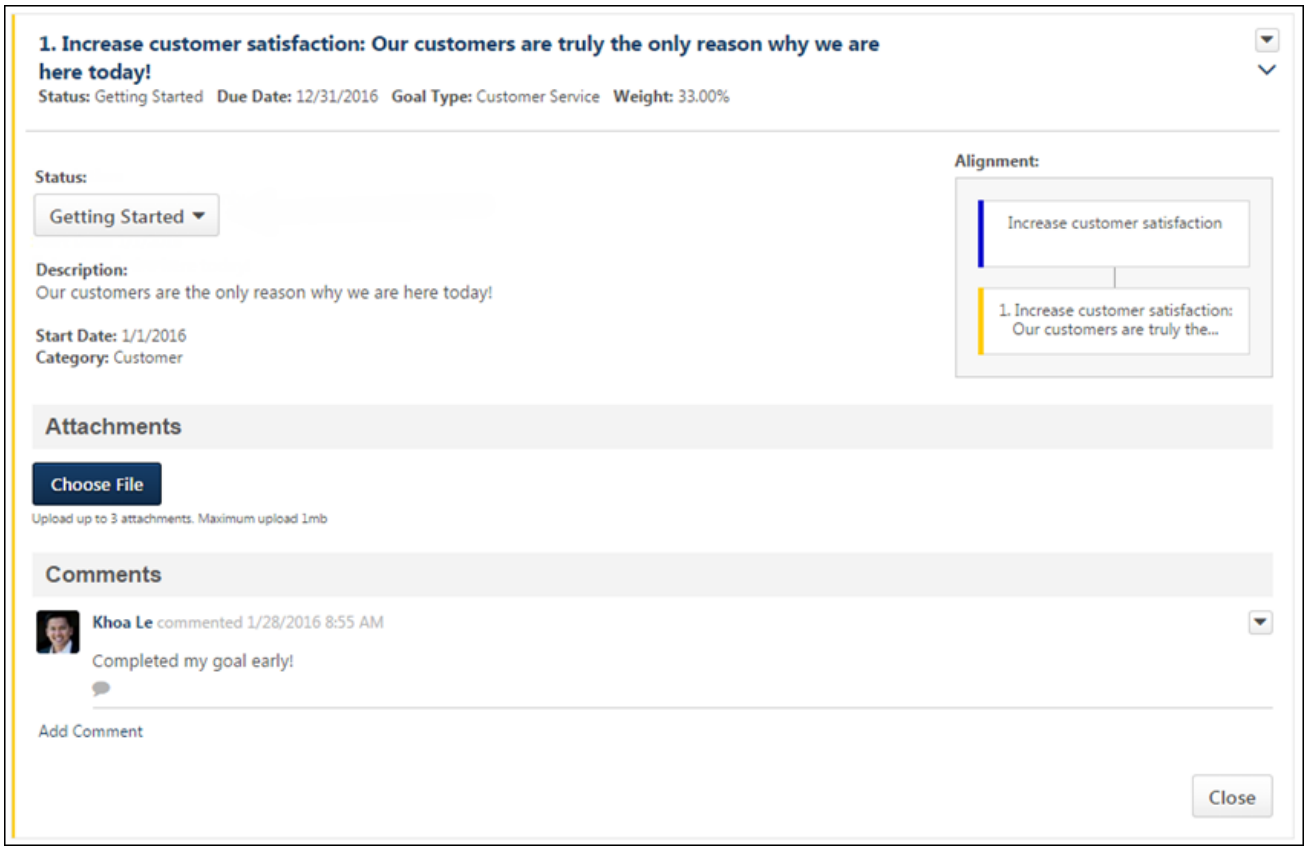
Goal status is automatically saved when you select a new status.

To create a goal, go to PERFORMANCE > GOALS. Then click the **CREATE** button.

To edit a goal, go to PERFORMANCE > GOALS. Click the Actions menu icon to the right of the appropriate goal and select Edit.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Goals - Create	Grants ability for user to create goals for self (and direct and indirect reports if a manager). The permission constraints determine for whom the user can create goals. This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance


1. Increase customer satisfaction: Our customers are truly the only reason why we are here today!
Status: Getting Started Due Date: 12/31/2016 Goal Type: Customer Service Weight: 33.00%
Status:
Getting Started
Description:
Our customers are the only reason why we are here today!
Start Date: 1/1/2016
Category: Customer
Alignment:
Increase customer satisfaction
1. Increase customer satisfaction: Our customers are truly the...
Attachments
Choose File
Upload up to 3 attachments. Maximum upload 1mb
Comments
Khoa Le commented 1/28/2016 8:55 AM
Completed my goal early!
Add Comment
Close

Goals Redesign Auto-Upgrade

With the February 2016 release, Goals were redesigned for a stronger and more seamless process.

With this enhancement, all portals using Goals are automatically upgraded with the new Goals redesign.

- Security roles, permissions, and navigation pages are not impacted by the auto-upgrade.

Considerations

The new design applies to both new and in progress goals.

The Administrative pages like Goals Preferences, Configuration, Library, and Perspectives/Categories are not changed.

Because the goal creation process has changed, it is important that the directions that are customized in the Goal Creation Administration section of the Goals Configuration page are updated to reflect the new process.

Implementation

With this release, all portals are automatically upgraded to the new Goals redesign functionality.

Goals Team View - Excel Export

Prior to this enhancement, managers were able to export their team's goals to a PDF. This option only exports the goals that are currently displayed. If the manager has not expanded any direct reports, then this option is not available because no goals are displayed.

With this enhancement, administrators now have the option to export all of their team's goals to an Excel (Unicode .csv) file for the time period that is being viewed.

The following option is now available in the Options drop-down menu when viewing the Team Goals page:

- **Download Excel** - Select this option to export all of the team goals for the selected time period to an Excel document. This option exports the goals within the selected time period for all team members, even if the user's card is not expanded.

Implementation

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

All organizations using the Goals functionality will be automatically upgraded to the redesigned Goals functionality with the April 2016 Release.

Security

The following existing permission applies to this functionality:

Performance Features in Action Items

Performance Features in Action Items

Prior to this enhancement, a user would have to navigate to multiple places in the system to complete some of the performance-related tasks and approvals.

With this enhancement, a user can complete Goal, Development Plan, Peer, and Training Form approvals from the Request tab within Universal Profile: Actions. Also, a user can view Observation Checklist and Training Form tasks in the Universal Profile: Actions page. This allows the user to more efficiently complete tasks and provide approvals.

Considerations

Observation Checklist approvals are not included in this enhancement.

Implementation

This functionality is automatically enabled for all organizations using the Performance module and Universal Profile: Actions.

Security

The following existing permissions apply to this functionality:

Universal Profile - Actions

With this enhancement, the following actions are now available on the Universal Profile: Actions page:

- Observation Checklists
- Training Forms

In order to support this, the Action Type filter on the Actions page now contains the following filter options:

- Observation Checklists
- Training Forms

To access the Action Items, go to HOME > UNIVERSAL PROFILE. Then, click the Actions tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - EPM	Grants ability to view and take action upon Performance (EPM) items on the Action Items page and in the Your Action Items widget. This permission can be constrained by OU, User's OU, User's Self, and User's Self and Subordinates. This is an end user permission.	Universal Profile

Actions - Observation Checklists

With this enhancement, observation checklist tasks are now available from the Universal Profile: Actions page.

An observation checklist task appears in the Actions page for users in the following scenarios:

- If a validator/verifier exists for a checklist, then the checklist is available to validators.
- If no validator/verifier exists for a checklist, then the checklist is available to the manager who is able to validate/verify.
  - When the manager adds a verifier or co-planner, the observation checklist becomes available in the verifier or co-planner's Actions page and it is no longer available in the manager's Actions page.

To access the Action Items, go to HOME > UNIVERSAL PROFILE. Then, click the Actions tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - EPM	Grants ability to view and take action upon Performance (EPM) items on the Action Items page and in the Your Action Items widget. This permission can be constrained by OU, User's OU, User's Self, and User's Self and Subordinates. This is an end user permission.	Universal Profile

When an observation checklist action item is displayed on the Action Items page, the following is displayed for each action item:

- Color Strip - The left edge of the action item icon is color coded to represent proximity to the due date of the action item. For example, if the action item due date is past due, then the color strip is red to indicate that action is required immediately. If an action item due date is not eminent, then the color strip is green to indicate that action is not required immediately. *See the Color Strip Key section below for additional information.*
- Title - This displays the action item title. Click the action item title to open the Manage Checklist page with the page filtered so that only checklists from the selected task are displayed. On the Manage Checklist page, the Checklist search filter is not available because the page is automatically filtered by the selected checklist.
- Due Date - This displays the earliest due date for any item within the checklist.
- Remaining - This displays the number of checklists within the task that have not yet been completed.
- Priority Flag - This button allows users to mark action items as high priority. Priority can be helpful as a visual indicator to users. Also, action items can be filtered by priority from the Sort drop-down at the top of the page. When the priority flag is not selected, it

is gray . When the priority flag is selected, the action item is high priority and the flag is red .

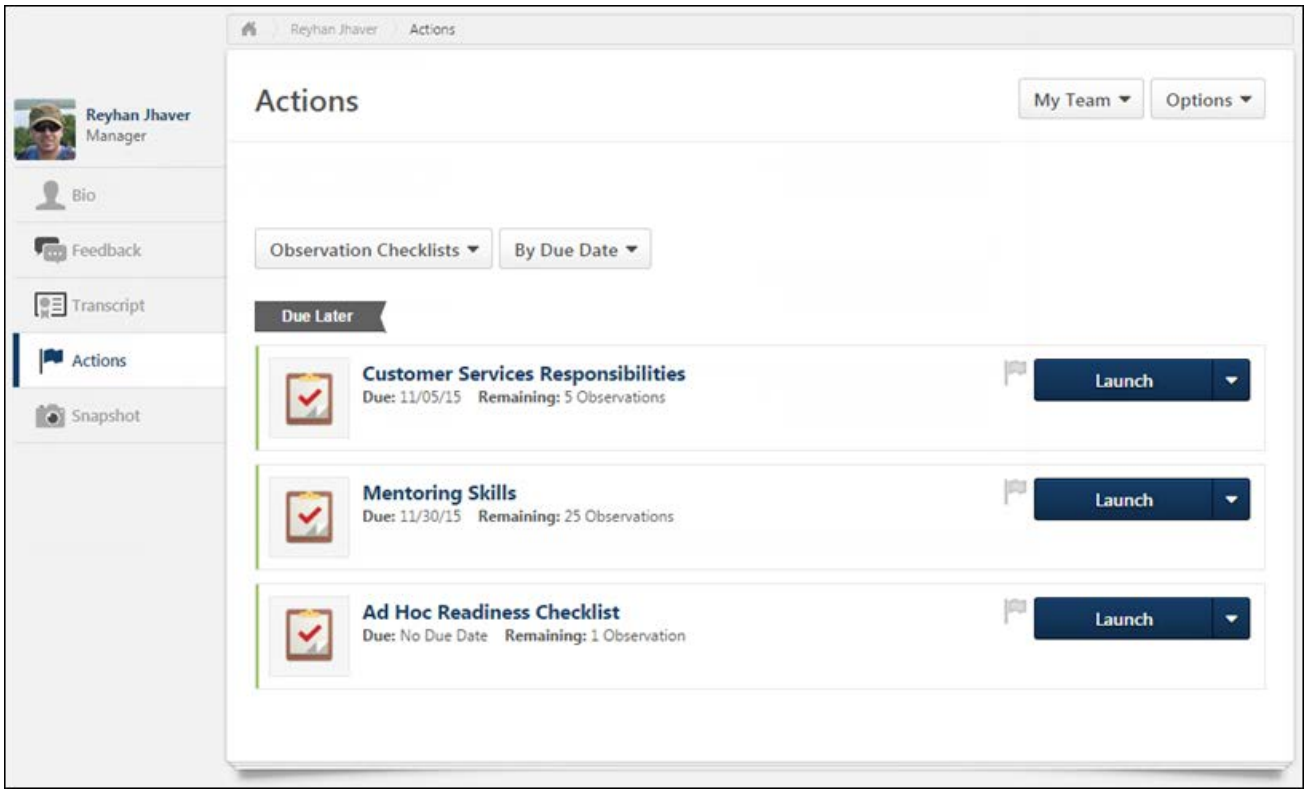
The following options are available from the action item drop-down menu:

- Launch - Click this option to open the Manage Checklist page with the page filtered so that only checklists from the selected task are displayed. On the Manage Checklist page, the Checklist search filter is not available because the page is automatically filtered by the selected checklist.

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Orange - Due within the next seven days, not including today
- Green - Due after seven days



Actions - Training Forms

With this enhancement, training form tasks are now available from the Universal Profile: Actions page.

To access the Action Items, go to HOME > UNIVERSAL PROFILE. Then, click the Actions tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - EPM	Grants ability to view and take action upon Performance (EPM) items on the Action Items page and in the Your Action Items widget. This permission can be constrained by OU, User's OU, User's Self, and User's Self and Subordinates. This is an end user permission.	Universal Profile

When a training form item is displayed on the Action Items page, the following is displayed for each action item:

- Color Strip - The left edge of the action item icon is color coded to represent proximity to the due date of the action item. For example, if the action item due date is past due, then the color strip is red to indicate that action is required immediately. If an action item due date is not eminent, then the color strip is green to indicate that action is not required immediately. *See the Color Strip Key section below for additional information.*
- Title - This displays the action item title. Click the action item title to open the training form.
- Due Date - This displays the due date for the training form.
- Status - This displays the current status of the action item.
- Priority Flag - This button allows users to mark action items as high priority. Priority can be helpful as a visual indicator to users. Also, action items can be filtered by priority from the Sort drop-down at the top of the page. When the priority flag is not selected, it is gray . When the priority flag is selected, the action item is high priority and the flag is red .

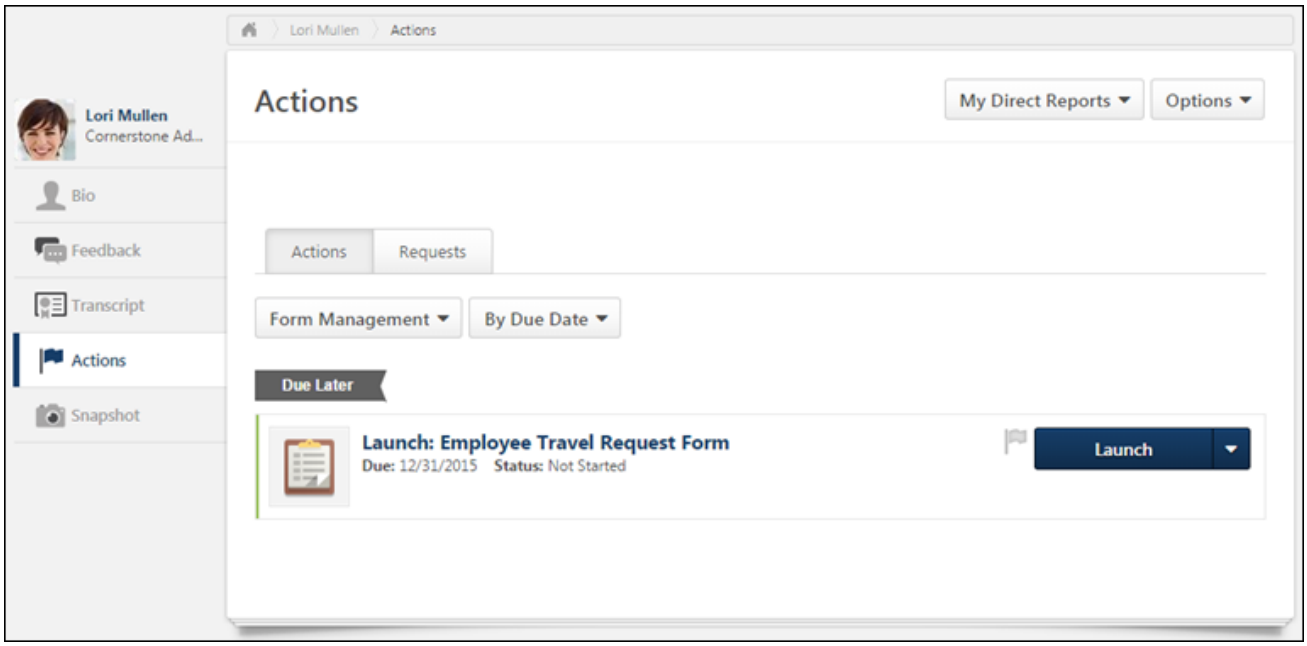
The following options are available from the action item drop-down menu:

- Launch - Click this option to open the Manage Training Forms page.

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Orange - Due within the next seven days, not including today
- Green - Due after seven days


Lori Mullen
Actions
Lori Mullen
Cornerstone Ad...
Bio
Feedback
Transcript
Actions
Snapshot
Actions
My Direct Reports
Options
Actions
Requests
Form Management
By Due Date
Due Later
Launch: Employee Travel Request Form
Due: 12/31/2015 Status: Not Started
Launch

Universal Profile - Actions - Requests

With this enhancement, the following requests are now available on the Requests tab of the Universal Profile: Actions page:

- Goal
- Development Plan
- Peers
- Training Form

In order to support this, the Request Type filter on the Actions page now contains the following filter options:

- Development Plan Approval
- Form Approval
- Goal Approval
- Peer Approval

In the Status filter, all pending statuses for goals (i.e., Pending Approval, Pending Modification Approval, and Pending Cancellation Approval) are included in the Pending status.

In the Status filter, all pending statuses for development plans (i.e., Pending Acceptance Approval, Pending Completion Approval, and Pending Cancellation Approval) are included in the Pending status.

To view approval requests, go to HOME > UNIVERSAL PROFILE > ACTIONS. Then, click the Requests tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

Actions - Requests - Development Plans

From the Requests tab, approvers can access their pending approval requests, view completed requests, and view approval progress. The tab only displays for users with permission to view request items.

With this enhancement, approvers can now view development plan approval requests from the Requests tab of the Universal Profile: Actions page.

To view approval requests, go to HOME > UNIVERSAL PROFILE > ACTIONS. Then, click the Requests tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Development Plan Approval Denied	This email is triggered when a development plan approval request is denied. The user receives the email stating that their Development Plan Approval Request is denied.	Performance Management
Development Plan Approval Granted	This email is triggered when a user's development plan is approved. This email is sent to the user who submitted the plan.	Performance Management

When a development plan approval request is displayed on the Requests tab, the following is displayed for each request:

- Color Strip - The left edge of the action item icon is color coded to represent proximity to the due date of the action item. For example, if the action item due date is past due, then the color strip is red to indicate that action is required immediately. If an action item due date is not eminent, then the color strip is green to indicate that action is not required immediately. *See the Color Strip Key section below for additional information.*
- Title - This displays the action item title. Click the action item title to view the user's development plan.
- Date Submitted - This displays the date on which the item was submitted for approval.
- Status - This displays the current status of the request.
- Submitted by - This displays the name of the user who submitted the development plan for approval.

Approve

To approve the request, click the **APPROVE** button . This commits your approval decision for that development plan. The development plan's status is updated to Approved. If the email is configured, then this action triggers an email notification to alert the user that their development plan was approved.

Deny

To deny the request, click the **DENY** button . If the email is configured, then this action triggers an email notification to alert the user that their development plan was denied.

Options

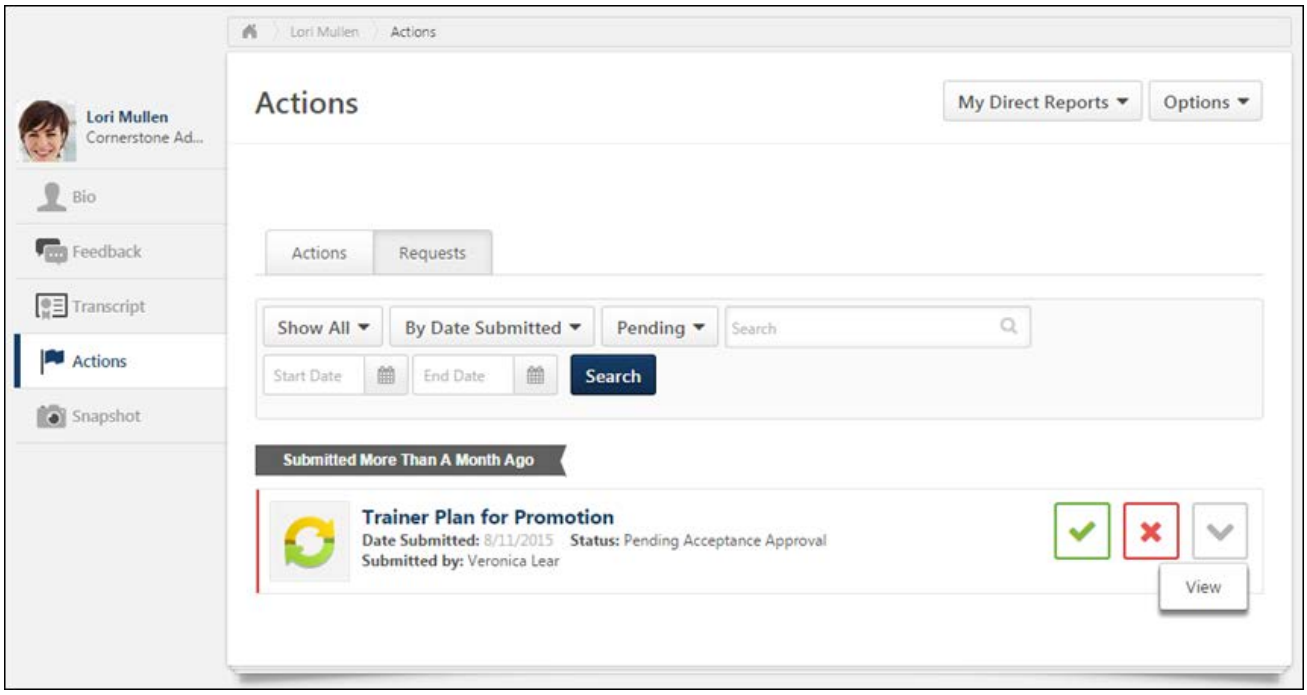
The following options may be available from the action item drop-down menu:

- View - Select this option to view the user's development plan. After reviewing the plan, click the **BACK** button to return to the Requests page.
- Edit - This option may be available depending on the configuration of the development plan. Select this option to edit the user's development plan.

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Orange - Due within the next seven days, not including today
- Green - Due after seven days



Actions - Requests - Goals

From the Requests tab, approvers can access their pending approval requests, view completed requests, and view approval progress. The tab only displays for users with permission to view request items.

With this enhancement, approvers can now view goal approval requests from the Requests tab of the Universal Profile: Actions page.

To view approval requests, go to HOME > UNIVERSAL PROFILE > ACTIONS. Then, click the Requests tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Goal Approved	This email is triggered when a user submits a goal or requests to cancel a goal and the request is approved by the approver.	Performance Managemen t
Goal Denied	This email is triggered when a user submits a goal or requests to cancel a goal and the request is denied by the approver.	Performance Managemen t

When a goal approval request is displayed on the Requests tab, the following is displayed for each request:

- Color Strip - The left edge of the action item icon is color coded to represent proximity to the due date of the action item. For example, if the action item due date is past due, then the color strip is red to indicate that action is required immediately. If an action item due date is not eminent, then the color strip is green to indicate that action is not required immediately. *See the Color Strip Key section below for additional information.*
- Title - This displays the action item title. Click the action item title to open the View Goal or Edit Goal page. The ability for an approver to edit a user's goal is configured by the administrator.
- Date Submitted - This displays the date on which the item was submitted for approval.
- Goal Owner - This displays the name of the user who submitted the goal for approval.
- Status - This displays the current status of the request.

Approve

To approve the request, click the **APPROVE** button . This commits your approval decision for that goal. The goal's status is updated to Approved. If the email is configured, then this action triggers an email notification to alert the user that their goal was approved.

Deny

To deny the request, click the **DENY** button . This opens a Deny Request pop-up, in which you must provide comments regarding why the goal is denied. Within the pop-up, enter the reason for denying the goal and click the **DENY** button. If the email is configured, then this action triggers an email notification to alert the user that their goal was denied.

Options

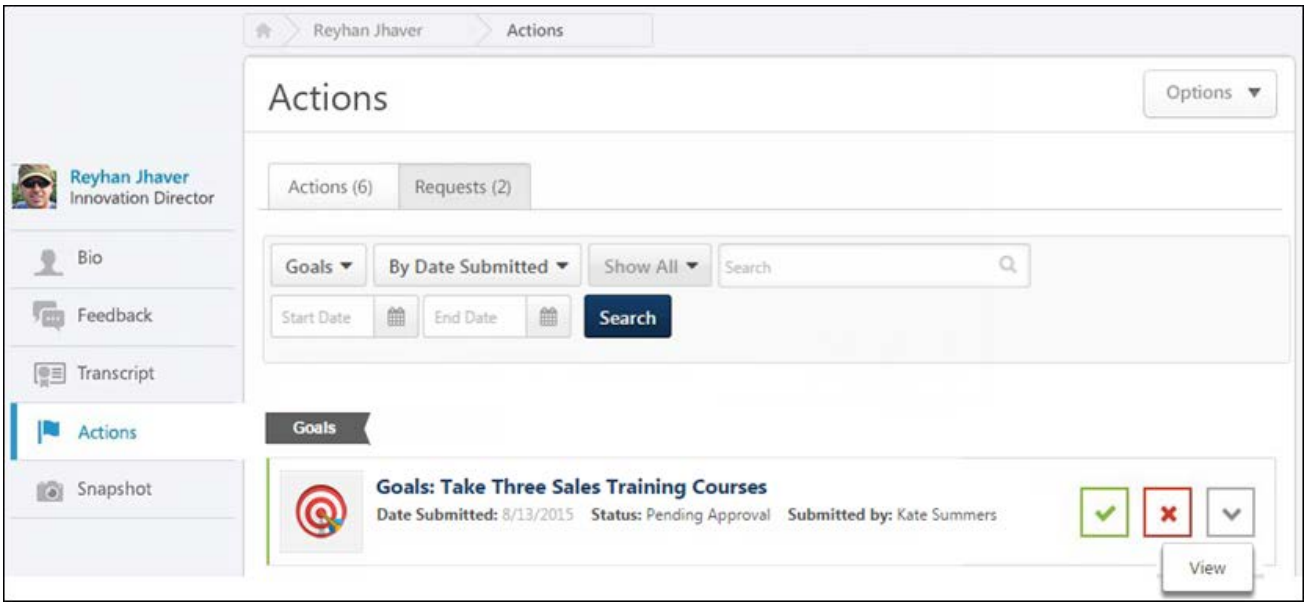
The following options may be available from the action item drop-down menu:

- View - This option is available the goal is locked or if managers and approvers are not allowed to edit an employee's goal. This option opens a read-only version of the user's goal. The approver is able to add comments and attachments to the goal. The option to Approve or Deny the goal is available when viewing the goal. *See* **Goal - Approve or Deny** on page 455 *for additional information.*
- Edit - This option is available if managers and approvers are allowed to edit an employee's goal. This option opens the Edit Goals page for the goal. *See Goal - Create/Edit (New Design).*

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Orange - Due within the next seven days, not including today
- Green - Due after seven days


Reyhan Jhaver
Actions
Actions
Options
Reyhan Jhaver
Innovation Director
Actions (6)
Requests (2)
Bio
Feedback
Transcript
Actions
Snapshot
Goals
By Date Submitted
Show All
Search
Start Date
End Date
Search
Goals
Goals: Take Three Sales Training Courses
Date Submitted: 8/13/2015 Status: Pending Approval Submitted by: Kate Summers
View

Actions - Requests - Peers

From the Requests tab, approvers can access their pending approval requests, view completed requests, and view approval progress. The tab only displays for users with permission to view request items.

With this enhancement, approvers can now view peer approval requests from the Requests tab of the Universal Profile: Actions page.

To view approval requests, go to HOME > UNIVERSAL PROFILE > ACTIONS. Then, click the Requests tab.

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
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

When a peer approval request is displayed on the Requests tab, the following is displayed for each request:

- Color Strip - The left edge of the action item icon is color coded to represent proximity to the due date of the action item. For example, if the action item due date is past due, then the color strip is red to indicate that action is required immediately. If an action item due date is not eminent, then the color strip is green to indicate that action is not required immediately. *See the Color Strip Key section below for additional information.*
- Title - This displays the action item title. Click the action item title to view the Universal Profile - Bio page for the peer. The user's Bio page cannot be viewed if the approver does not have permission to view the peer's Bio page or if the peer is an external user.
- Date Submitted - This displays the date on which the item was submitted for approval.
- Group - This displays the peer group to which the peer is being added.
- Submitted by - This displays the name of the user who submitted the peer for approval.

Approve

To approve the request, click the **APPROVE** button . This commits your approval decision for that peer. If the email is configured, then this action triggers an email notification to alert the user that their development plan was approved.

Deny

To deny the request, click the **DENY** button .

Options

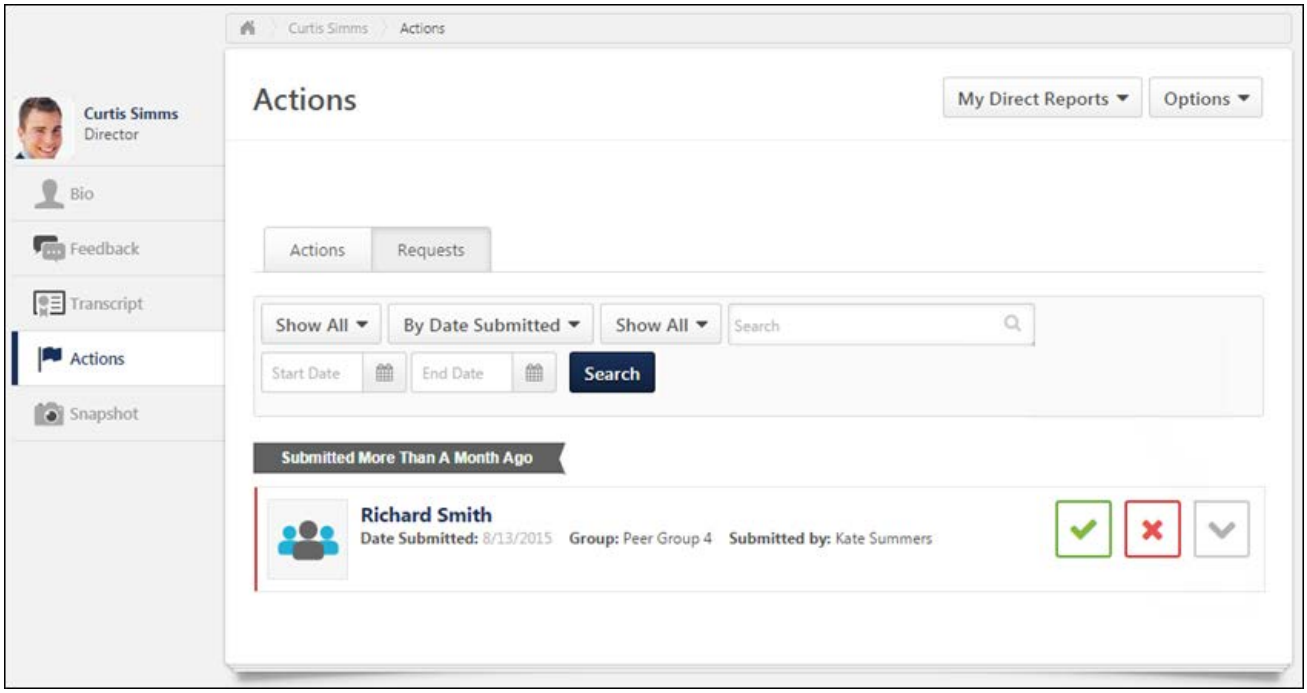
The following options may be available from the action item drop-down menu:

- View - Select this option to view the Universal Profile - Bio page for the peer. The user's Bio page cannot be viewed if the approver does not have permission to view the peer's Bio page or if the peer is an external user.

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Orange - Due within the next seven days, not including today
- Green - Due after seven days



Actions - Requests - Training Forms

From the Requests tab, approvers can access their pending approval requests, view completed requests, and view approval progress. The tab only displays for users with permission to view request items.

With this enhancement, approvers can now view training form approval requests from the Requests tab of the Universal Profile: Actions page.

To view approval requests, go to HOME > UNIVERSAL PROFILE > ACTIONS. Then, click the Requests tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Training Form Approved	User's training form marked Approved by an Approver.	Training Form Management
Training Form Denied	User's training form marked Denied by an Approver.	Training Form Management

When a training form approval request is displayed on the Requests tab, the following is displayed for each request:

- Color Strip - The left edge of the action item icon is color coded to represent proximity to the due date of the action item. For example, if the action item due date is past due, then the color strip is red to indicate that action is required immediately. If an action item due date is not eminent, then the color strip is green to indicate that action is not required immediately. *See the Color Strip Key section below for additional information.*
- Title - This displays the action item title. Click the action item title to view the user's training form.
- Date Submitted - This displays the date on which the item was submitted for approval.
- Status - This displays the current status of the request.
- Submitted by - This displays the name of the user who submitted the training form for approval.

Approve

To approve the request, click the **APPROVE** button . This commits your approval decision for that training form. The training form's status is updated to Approved. If the email is configured, then this action triggers an email notification to alert the user that their training form was approved.

Deny

To deny the request, click the **DENY** button . If the email is configured, then this action triggers an email notification to alert the user that their training form was denied.

Options

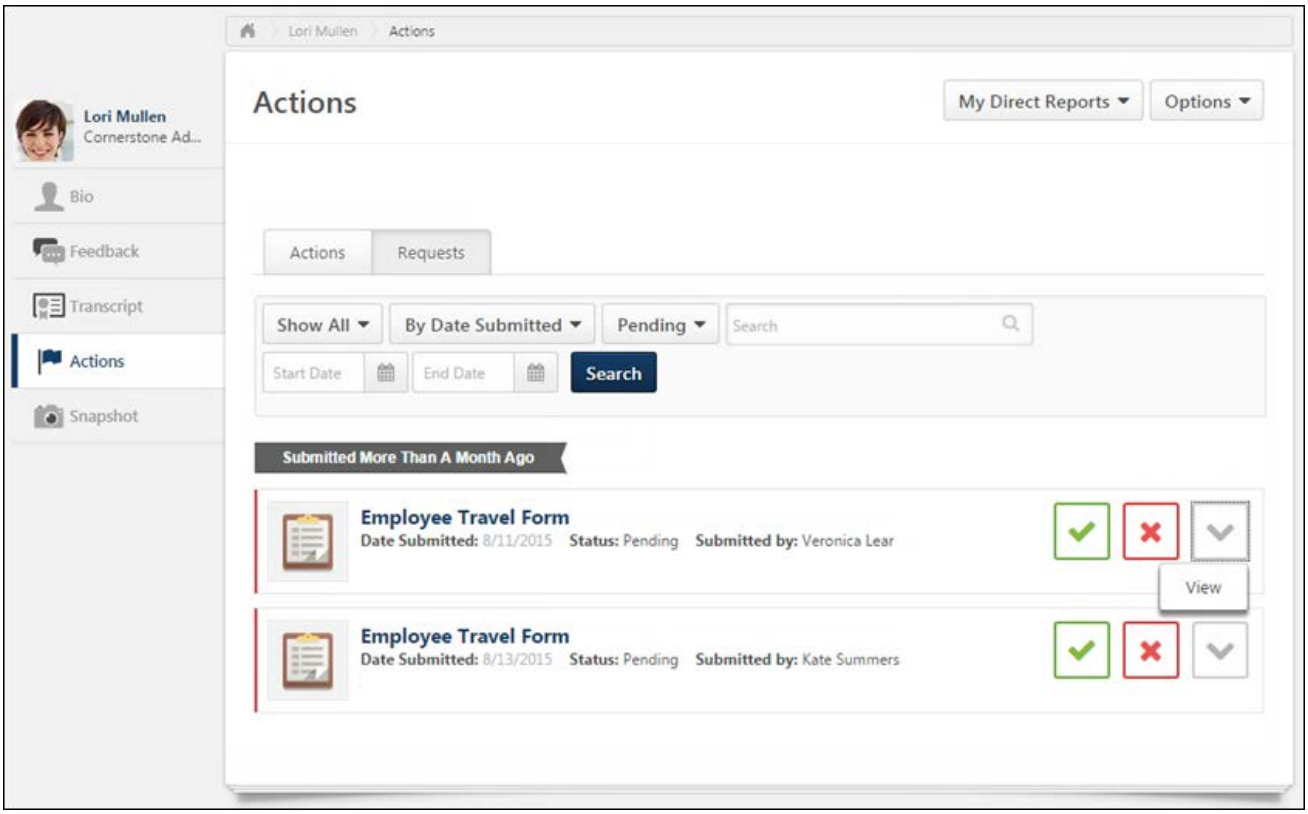
The following options may be available from the action item drop-down menu:

- View - Select this option to view the user's training form. After reviewing the form, click the **BACK** button to return to the Requests page.

Color Strip Key

The following colors are available:

- Red - Due today or past due
- Orange - Due within the next seven days, not including today
- Green - Due after seven days



Goal - Approve or Deny

Approvers can approve or deny a goal from the Requests tab of the Universal Profile: Actions page. When viewing a goal approval request, users may have the option to view or edit the goal. The availability of these options is based on whether the goal is locked and whether the approver or manager is able to edit the user's goal.

When viewing or editing a user's goal from the Requests tab of the Actions page, the user can approve or deny the goal from this page. The following options are available at the bottom of the page:

- **APPROVE** - Click this button to approve the goal. This commits your approval decision for that goal. The goal's status is updated to Approved. If the email is configured, then this action triggers an email notification to alert the user that their goal was approved.
- **DENY** - Click this button to deny the goal. This opens a Deny Request pop-up, in which you must provide comments regarding why the goal is denied. Within the pop-up, enter the reason for denying the goal and click the **DENY** button. If the email is configured, then this action triggers an email notification to alert the user that their goal was approved. ***Note:*** *If the approver edited the goal prior to denying it, then the approver's changes are discarded.*
- **CANCEL** - Click this button to exit the page without approving or denying the goal and return to the previous page.

To view approval requests, go to HOME > UNIVERSAL PROFILE > ACTIONS. Then, click the Requests tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Goal Approved	This email is triggered when a user submits a goal or requests to cancel a goal and the request is approved by the approver.	Performance Management
Goal Denied	This email is triggered when a user submits a goal or requests to cancel a goal and the request is denied by the approver.	Performance Management

Performance Rewards and Recognition - Leaderboard

Performance Rewards and Recognition - Leaderboard

As part of the Learning Reward and Recognition project, users are now able to track their Feedback and Learning badges via a new My Badges page and engage in competition on a new Leaderboard page. Rewards and Recognition gives employees the opportunity to engage in competition and for the organization to motivate their employees to give and receive feedback, learn, and develop through non-competitive awards. Points need to be associated with Feedback Badges for users to be tracked on the Leaderboard.

Reporting and Data Load is targeted for a future Release.

Implementation

This functionality is automatically available to all organizations using the Performance or Learning module. However, the Learning Badges and Points are only available to organizations using the Learning module.

- For portals using the Learning and Performance modules, the Badges widget is driven by a combination of Learning and Feedback badges. The Leaderboard widget is driven by a combination of Learning points and points associated with Learning and Feedback badges.
- For portals using the Performance module and not the Learning module, the Badges widget is driven by Feedback badges. The Leaderboard widget is driven by points associated with Feedback badges.
- Portals that are not using the Performance or Learning module cannot use the Badges or Leaderboard functionality.

With regards to the Badges Widget on the Snapshot page, this widget is disabled by default, and must be enabled via Snapshot General Preferences. Also, the Snapshot - Badges permission is automatically added to the default System Administrator role and must be granted to the appropriate users.

With regards to the Leaderboard Widget on the Snapshot page, this widget is disabled by default, and must be enabled via Snapshot General Preferences. Also, the Snapshot - Leaderboard permission is automatically added to the default System Administrator role and must be granted to the appropriate users.

The Badge Preferences - Manage permission is renamed and is now titled Badge & Point Preferences. Any users who previously had this permission are not affected. However, the Badge & Point Preferences permission must be granted to administrators who need the ability to create and manage badges and configure the Leaderboard.

Glossary

- Badge - A form of employee recognition that can be awarded when a user receives positive feedback or when a user completes training. Badges may have an associated point value. Depending on the portal configuration, users may be able to view their badges via a widget on the Universal Profile - Snapshot page.
- Leaderboard - A user may receive points for completing training. Also, a user may be awarded a badge by completing training or receiving positive feedback from another

user. When a user receives a badge, they are also awarded any points that are associated with the badge. The Leaderboard is a page within the Universal Profile - Snapshot that enables users to view their total number of points, their overall points ranking within the organization, and the top 10 users who have the most points.

- Point - A user may receive points for completing training. Also, a user may be awarded a badge by completing training or receiving positive feedback from another user. When a user receives a badge, they are also awarded any points that are associated with the badge. Depending on the portal configuration, users may be able to view their points and a points leaderboard via a widget on the Universal Profile - Snapshot page.

Security

The following new permissions apply to this functionality:

The Badge Preferences - Manage permission is renamed and is now titled Badge & Point Preferences - Manage. This permission is now in the Core Administration category. Also, the page to which this permission controls access, the Badge Preferences page, is renamed and is now titled Badge & Point Preferences.

These changes will be reflected throughout Online Help when this functionality is released.

The following existing permissions apply to this functionality:

Badge & Point Preferences - Badges (Performance)

With this enhancement, the points that are associated with a badge are now utilized throughout the system. For example, a manager can view a subordinate's total number of badges and points within the Universal Profile Snapshot and a Leaderboard page displays employees with the most amount of points across the user's organizational units (OUs).

In order to support this enhancement, the Badge Preferences page is renamed and is now titled Badge & Point Preferences. This page is accessible via Core Preferences and Learning Preferences. Also, the Badge & Point Preferences page is divided into two tabs, Badges and Points.

The Badges tab contains all of the functionality from the previously existing Badge Preferences page.

See **Badge & Point Preferences - Badges** on page 312 *for additional information.*

Badge & Point Preferences - Points (Performance)

With this enhancement, a new Leaderboard page is now available within Universal Profile: Snapshot.

In order to support this enhancement, the Badge & Point Preferences page is divided into two tabs, Badges and Points.

The Points tab of the Badge & Point Preferences page enables administrators to configure the Leaderboard page that exists within Universal Profile: Snapshot.

See **Badge & Point Preferences - Points** on page 316 *for additional information.*

Snapshot General Preferences (Performance)

With this enhancement, the points that are associated with a badge are now utilized throughout the system. For example, a manager can view a subordinate's total number of badges and points within the Universal Profile Snapshot and a Leaderboard page displays employees with the most amount of badge points across the user's organizational units (OUs).

In order to support this enhancement, administrators can now configure whether or not a Badges and Leaderboard widget are available on the Snapshot page.

See **Snapshot General Preferences** on page 318 *for additional information.*

Snapshot - Badges and Leaderboard Widgets (Performance)

With this enhancement, a Badges and Leaderboard widget can be enabled for the Snapshot page.

See **Snapshot - Badges and Leaderboard Widgets** on page 326 *for additional information.*

Snapshot - My Badges (Performance)

The My Badges page enables users, managers, and administrators to view all of the badges that the user has been awarded. This page displays all types of badges such as Feedback and Learning badges. This page can be filtered by badge type.

See **Snapshot - My Badges** on page 329 *for additional information.*

Snapshot - Leaderboard (Performance)

A user may be awarded a badge by receiving positive feedback from another user. When a user receives a badge, they are also awarded any points that are associated with the badge.

The Leaderboard page enables users to view their total number of points, their overall points ranking within their organizational unit, and the top 10 users who have the most points. Also, if the user is not in the top 10 ranking, then the user is displayed at the bottom of the page with the user who ranks above them and the user who ranks below them.

This page can be filtered by organizational unit (OU) and by time frame.

See **Snapshot - Leaderboard** on page 331 *for additional information.*

Structured Feedback

Structured Feedback Overview

Prior to this enhancement, users were able to request feedback and receive simple comment-based responses.

With this enhancement, users can add yes/no questions or rating questions to feedback requests. This allows users to receive clear, quick responses in a more seamless manner.

Considerations

For Rating type questions, administrators cannot configure the rating scale. A 1-5 rating scale is used.

A maximum of 10 questions can be added to a feedback request.

Implementation

This functionality is available to all organizations using Universal Profile - Feedback.

Upon release, this functionality is enabled in Stage portals, and is disabled in Pilot and Production portals.

The availability of this functionality is controlled by a backend setting, which is disabled by default. To enable this functionality, contact Global Product Support. For more information about this functionality, contact your Client Success Manager.

Glossary

- Structured Feedback - The ability to add yes/no or rating questions to a feedback request. This allows users to receive clear, quick responses in a more seamless manner.

Security

The following existing permission applies to this functionality:

Feedback - Request Feedback

Prior to this enhancement, users were able to request feedback and receive simple comment-based responses.

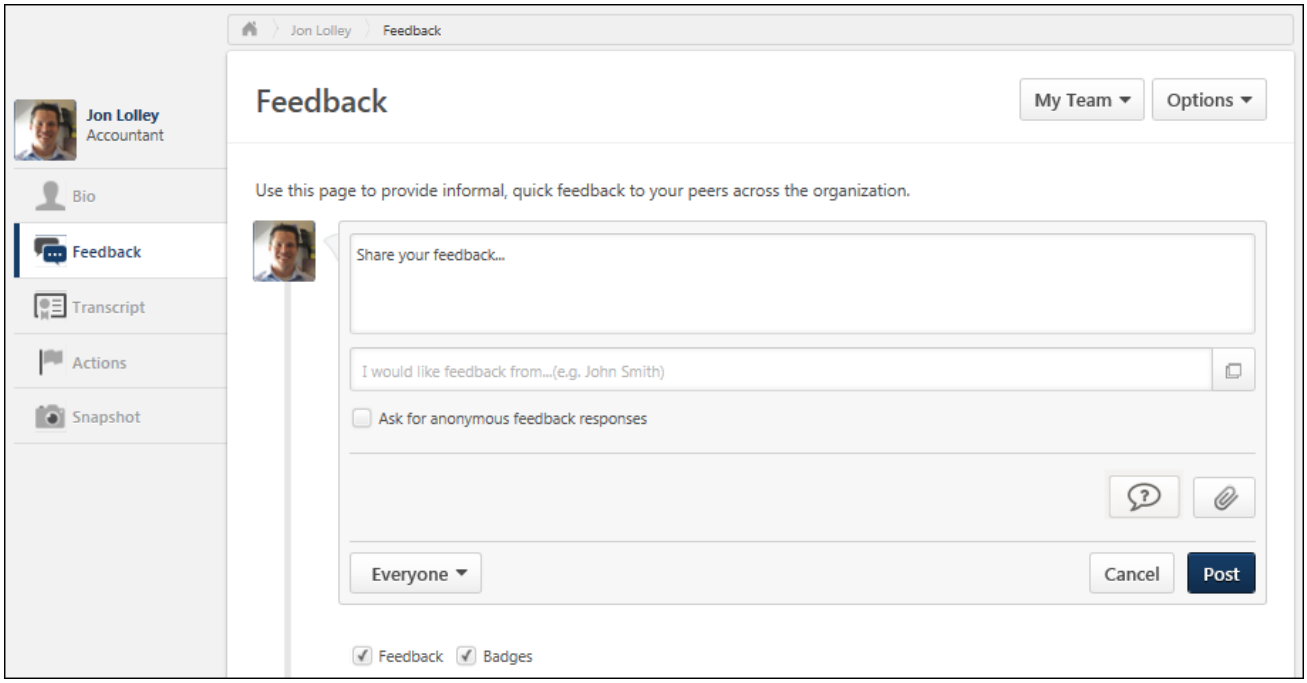
With this enhancement, users can add yes/no questions or rating questions to feedback requests. This allows users to receive clear, quick responses in a more seamless manner.

To request feedback, click the Feedback tab within Universal Profile. Then, click the **Feedback** field. The Feedback field expands to display additional options.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback - Request	Enables user to request feedback from the Feedback page of their Universal Profile. Users can only request feedback from other users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile

With this enhancement, a new **ADD QUESTIONS** button  is now available when requesting feedback.

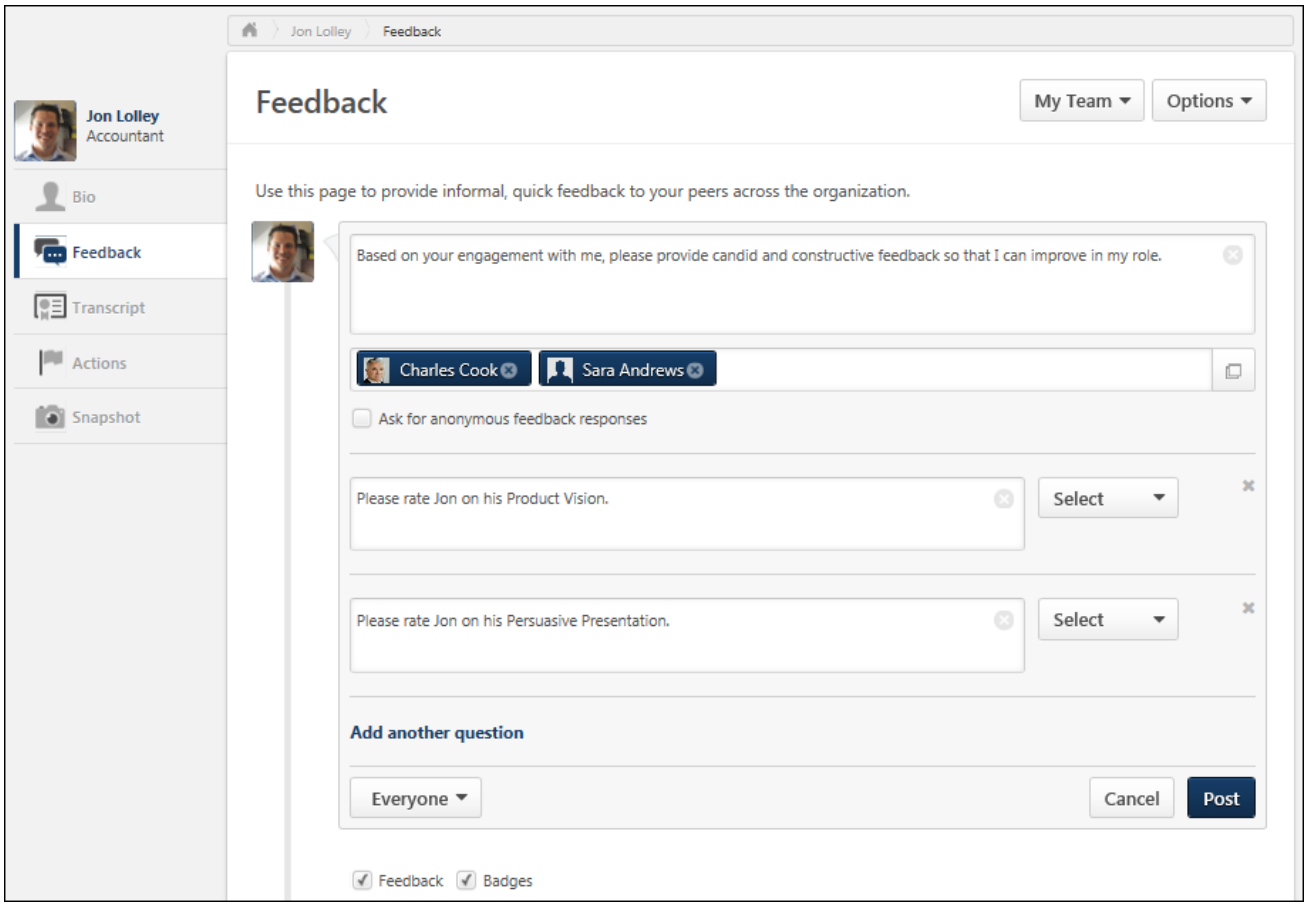


To add a question to your feedback request, click the **ADD QUESTIONS** button  . A blank question is added to the feedback request. Enter the following information for the question:

- **What is your question?** - In the text field, enter the question text. Be sure that the question text matches the selected rating type. For example, if the rating type is Yes/No, be sure that the question that is being asked can be answered with a yes or no response. This field is required, and the character limit for this field is 500.
- **Select Rating Type** - From the drop-down menu, select the type of rating that should be used with the question. The following rating types are available:
  - Rating - Users who respond to this question will provide a rating between one and five.
  - Yes/No - Users who respond to this question will provide either a Yes or No response.

To remove a question from a feedback request, click the Remove icon ✖ to the right of the **Select Rating Type** drop-down menu.

To add an additional question, click the **Add another question** link. An additional blank question is added to the page. Up to 10 questions can be added to a feedback request.


Jon Lolley
Feedback
Jon Lolley
Accountant
Bio
Feedback
Transcript
Actions
Snapshot
Feedback
My Team
Options
Use this page to provide informal, quick feedback to your peers across the organization.
Based on your engagement with me, please provide candid and constructive feedback so that I can improve in my role.
Charles Cook
Sara Andrews
Ask for anonymous feedback responses
Please rate Jon on his Product Vision.
Select
Please rate Jon on his Persuasive Presentation.
Select
Add another question
Everyone
Cancel
Post
Feedback
Badges

Feedback - Provide Feedback

With this enhancement, users can add yes/no questions or rating questions to feedback requests. This allows users to receive clear, quick responses in a more seamless manner.

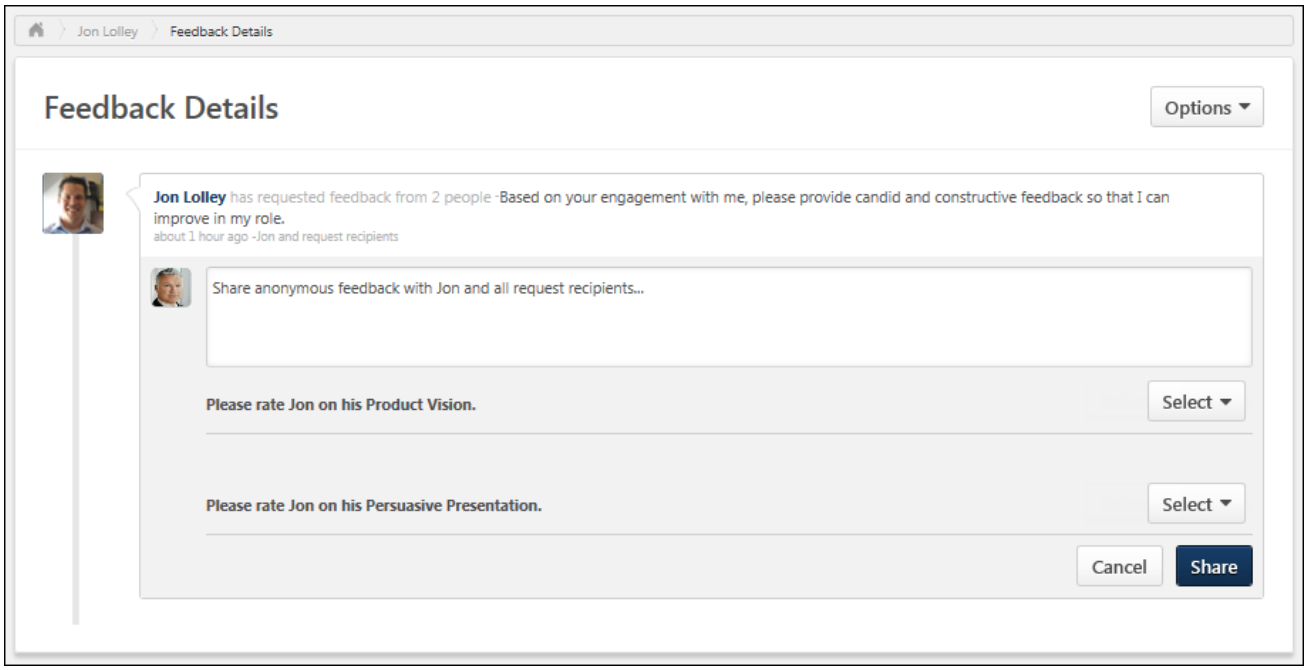
When a user is responding to a feedback request that contains questions, the user is able to quickly respond to the questions and provide additional comments.

To respond to a request for feedback, click the **Options** drop-down within Universal Profile and select **View Feedback Requests**. Then, click the appropriate request link. This opens the Feedback page for the user who requested the feedback. Depending on the feedback's visibility configuration, existing feedback from other users may be visible on the Feedback Details page. If the user provided anonymous feedback, then the user's name and photo are not displayed.

To provide feedback, click the text field. If the feedback request contains any questions, the questions are displayed below the text field.

- To add a feedback comment, enter the feedback in the text field. This is required.
- To respond to a question, click the **Select** drop-down menu and select the appropriate rating. The text to the right of the drop-down menu indicates the type of question. Responses to each question are not required.

After entering your feedback, click **SHARE**. This adds your comments and question ratings to the feedback request on the requester's Feedback page. Users are not able to modify their ratings after the feedback is shared unless they delete their feedback response. However, the feedback provider is always able to add additional comments to the feedback request.



Update Goal Progress from Performance Review

Update Goal Progress from Performance Review

Goal Rating sections can be added to a performance review, and these sections enable reviewers to view and rate the reviewee's goal progress for the task review period.

Prior to this enhancement, if a reviewer noticed that the progress of a goal needed to be updated, the reviewer had to exit the performance review, update the goal progress, and then return to the performance review.

With this enhancement, Goal Rating performance review sections can be configured to allow reviewers to access the Manage Goals page directly from the Goal Rating section. This enables the reviewer to quickly update the goal progress without exiting the performance review. The updated goal progress is reflected in the performance review.

Considerations

This functionality is only available to organizations using the new Performance Reviews and Goals functionality.

The option to manage a goal from within a Goal Rating performance review section is never available to peers and subordinates when they are completing a 360 performance review.

Implementation

This functionality is automatically enabled for all organizations using the new Goals functionality.

Upon release, the option to allow goal progress updates is disabled for all existing Goal Rating performance review section. However, this option is enabled by default for all Goal Rating sections that are created following this release.

Security

The following existing permissions apply to this functionality:

Goal Rating Section - Goal Progress Updates

With this enhancement, Goal Rating performance review sections can be configured to allow reviewers to access the Manage Goals page directly from the Goal Rating section.

This functionality is only available to organizations using the new Performance Reviews and Goals functionality.

To create a performance review section, go to ADMIN > TOOLS > PERFORMANCE MANAGEMENT > FORM SECTIONS. Then, click the **Create Review Section** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Form Sections - Manage	Grants ability to create and manage performance review questions and sections which are used in performance review tasks. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

The following option is now available in the Goal Settings section:

- **Allow goal progress updates in Review** - This option is selected by default. When this option is selected, reviewers can to manage goals directly from the Goal Rating section. This enables the reviewer to quickly update the goal progress without exiting the performance review.

Create Review Form Section

Create and customize a performance review section to appear in any performance review. Determine whether this section will contain goals, competencies, or Rating Scale and/or text response questions from the Section Type drop down. Custom Fields may be added to any section, except Sign-Off sections. Rating Scale and/or Text Response questions may be added to sections containing goals and competencies. Suggested comments may be added to each Rating Scale question. Weights can be applied to each free form question. When entering the directions for this section, you may insert tags that are replaced with information about the employee reviewed or with links to that employee's performance data.

Review Section

DEFINE REVIEW SECTION

Name:

Type: Please select the section type before proceeding.
Goal Rating Section

DETAILS

View Employee Custom Tags

Directions:

Design HTML

Category: --Select--

RATING SCALE

Score	Title	Description
Too New To Rate	Too New To Rate	Employee has not been in the position long enough to rate performance.
1	Below Expectations	Rarely or never demonstrates expected behavior/knowledge in own work; Requires substantial oversight and direction.
2	Needs Improvement	Demonstrates expected behavior/knowledge inconsistently or in situations of low complexity/challenge; Requires guidance to deal with more complex situations.
3	Meets Expectations	Uses expected behavior/ knowledge consistently in a full range of typical situations/challenges.
4	Periodically Exceeds Expectations	Applies expected behavior/ knowledge successfully in unusual or challenging situations (without any guidance); Periodically goes beyond expected behavior/knowledge - demonstrating superior problem solving, critical judgment and innovation.
5	Regularly Exceeds Expectations	Uses expected behavior/ knowledge appropriately in most complex or demanding situations; Consistently exceeds expectations - demonstrating superior problem solving, critical judgment and innovation; Guides others in dealing with challenging situations.

- (•) Display Rating Scale
- ( ) Hide Rating Scale
- [ ] Display Scores to End Users

RATING METHOD

Select a rating method that will be used in the review. Score Interval selection must be 1.0 for the below options to be available.

- (•) Drop Down Rating
- ( ) Star Rating Scale

CUSTOM FIELDS

Add Custom Fields

GOAL SETTINGS

Filter by Perspective: None

- [ ] Use the goal "Weight" as the weight for each goal.
- [x] Display Goal Weights on Review
- [x] Allow goal progress updates in Review

QUESTION SETTINGS

Total Goal Weight: 100 %

Total Question Weight: 0 %

- [ ] Display Question Numbers on Review.
- [x] Display Question Weights on the Print Version of the Review.

QUESTIONS

SECTIONS AND QUESTIONS	TYPE	RESPONSE REQUIRED	WEIGHT	OPTIONS

* No Questions Added

Cancel Save

Performance Review - Goal Rating Section

With this enhancement, Goal Rating performance review sections can be configured to allow reviewers to access the Manage Goals page directly from the Goal Rating section. This enables the reviewer to quickly update the goal progress without exiting the performance review. The updated goal progress is reflected in the performance review.

This functionality is only available to organizations using the new Performance Reviews and Goals functionality.

Review tasks are available in the Welcome Page - My Tasks section, the Performance Review Summary page, and the Universal Profile - Actions page.

To open a performance review task, click the performance review task title. The Overview step opens, displaying a snapshot of the review.

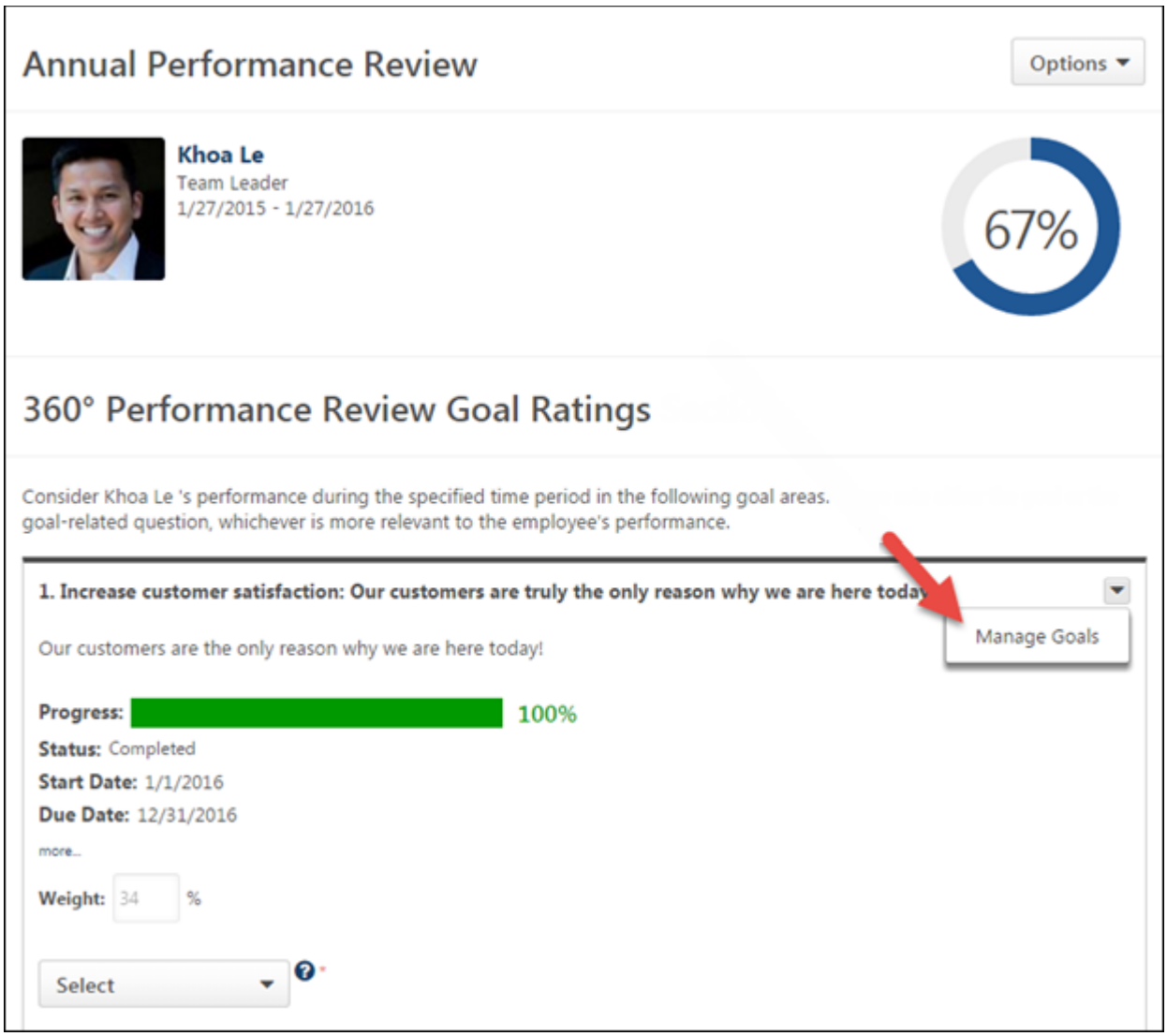
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

When the Goal Rating section is configured to allow users to update goal progress, a Manage Goals option is available in the Options drop-down menu to the right of each goal. This option is only available if the reviewer has permission to view the goal. This option opens the Manage Goals page for the goal. When done updating the goal progress, the user is directed back to the Goal Rating section so they can continue completing the performance review. *See Goal - Manage (New Design).*

This option is never available to peers and subordinates when they are completing a 360 performance review.

This option is not available if the performance review is in read-only mode.


Annual Performance Review
Options
Khoa Le
Team Leader
1/27/2015 - 1/27/2016
67%
360° Performance Review Goal Ratings
Consider Khoa Le 's performance during the specified time period in the following goal areas.
goal-related question, whichever is more relevant to the employee's performance.
1. Increase customer satisfaction: Our customers are truly the only reason why we are here today
Manage Goals
Our customers are the only reason why we are here today!
Progress:
100%
Status: Completed
Start Date: 1/1/2016
Due Date: 12/31/2016
more...
Weight: 34 %
Select

Added Performance Fields

With this enhancement, fields are added to the Competency and Goals sections for custom reports.

Competency

Goals

Reports - Performance Review Sign-off Section

With the February '16 release, administrators can configure a Sign-off performance review section to allow users to decline to sign.

With this enhancement, a new Performance Review Sign-off section is now available when creating a Performance Review custom report. This section enables administrators to create custom reports that include information about the Sign-off section. This includes the decline to sign functionality.

The following fields are available within the new section:

Implementation

This functionality is automatically enabled for all organizations using the Performance module and Custom Reports.

Security

The following existing permissions apply to this functionality:

Recruiting

Broadbean External Sourcing

Broadbean External Sourcing Overview

The Broadbean External Sourcing integration enables organizations to source applicants from external job boards in Broadbean. The applicants can be added to talent pools and invited to apply to the job.

Use Cases

- **Sourcing Candidates** - Lauren the Recruiter needs to find more candidates to apply for the requisitions she is responsible for. She wants to source candidates from different job board platforms.
- **Adding to Talent Pools and Inviting to Apply** - Once Lauren performs searches and finds candidates that could potentially fit the open positions, she wants to add those candidates to talent pools and/or invite them to apply to the requisitions.

Implementation

The Broadbean External Sourcing integration requires Cornerstone Learning and a Broadbean account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Glossary

- External Sourcing - Sourcing applicants from external job boards.

Security

The following new permission applies to this functionality:

The following existing permissions apply to this functionality:

Roles

The following permission is added to the Recruiting - Manager role:

- External Search: Manage

Requisition Templates - Keywords

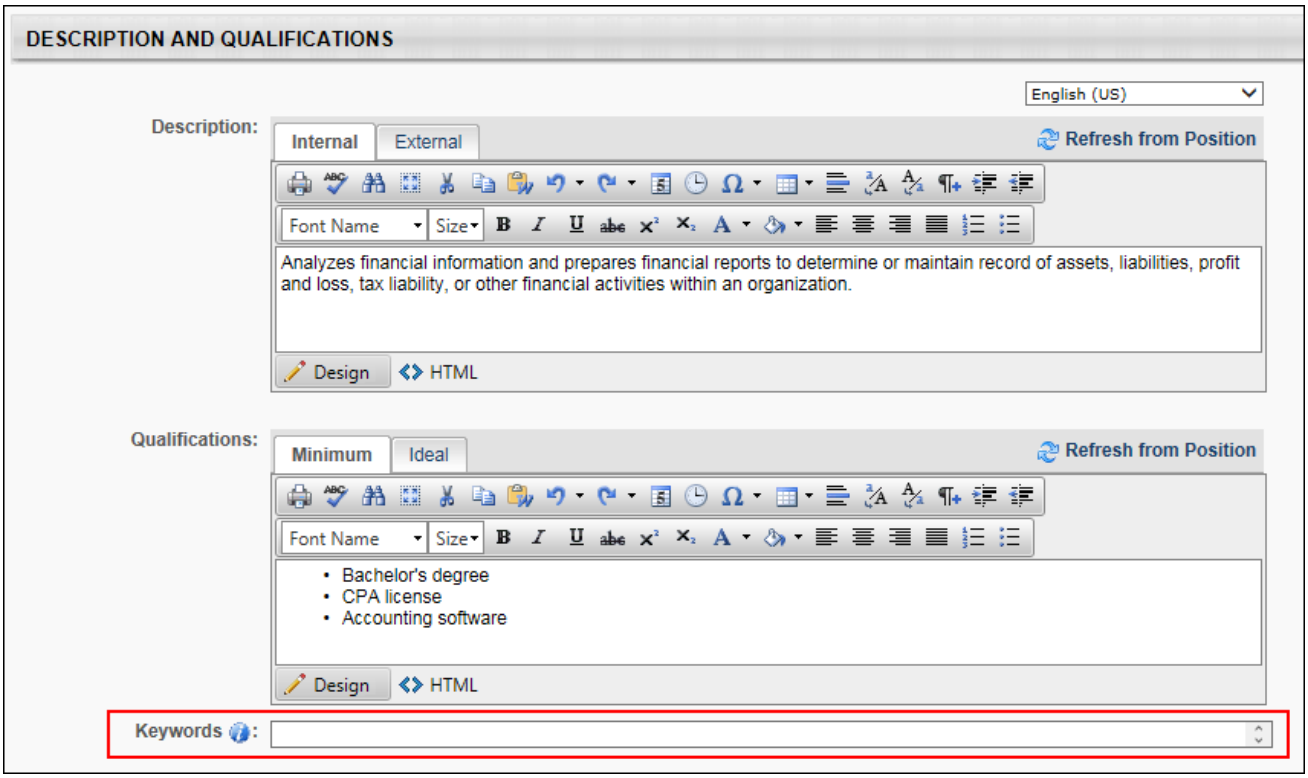
With this enhancement, a **Keywords** field is added to the Description and Qualifications section for requisition templates. The keywords that are added to the field are used when the recruiter is accessing Broadbean from the Manage Requisitions page.

Note: *The* **External Sourcing** *option allows recruiters to search for applicants from external job boards in Broadbean. The* **External Sourcing** *option can be accessed from the* ***Manage Job Requisitions*** *page and the* ***Candidate Search Query*** *page.*

To create requisition templates, go to **Admin > Tools > Recruit > Requisition Templates**. In the Options column to the right of the appropriate Position organizational unit (OU), click the Manage Requisition Template icon .

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units and custom groups. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration



Keywords

Enter keywords into the **Keywords** field, up to 1000 characters. Separate each keyword by a comma, and then a space.

The keywords can be localized by selecting the desired language from the language drop-down in the upper-right corner of the Description and Qualifications section. Then, enter the translated keywords in the **Keywords** field.

Create Job Requisition - Keywords

With this enhancement, a **Keywords** field is added to the Description and Qualifications section for requisition templates. The keywords that are added to the field are used when the recruiter is accessing Broadbean from the Manage Requisitions page.

to automatically populate the search criteria when searching for applicants through the **External Sourcing** option.

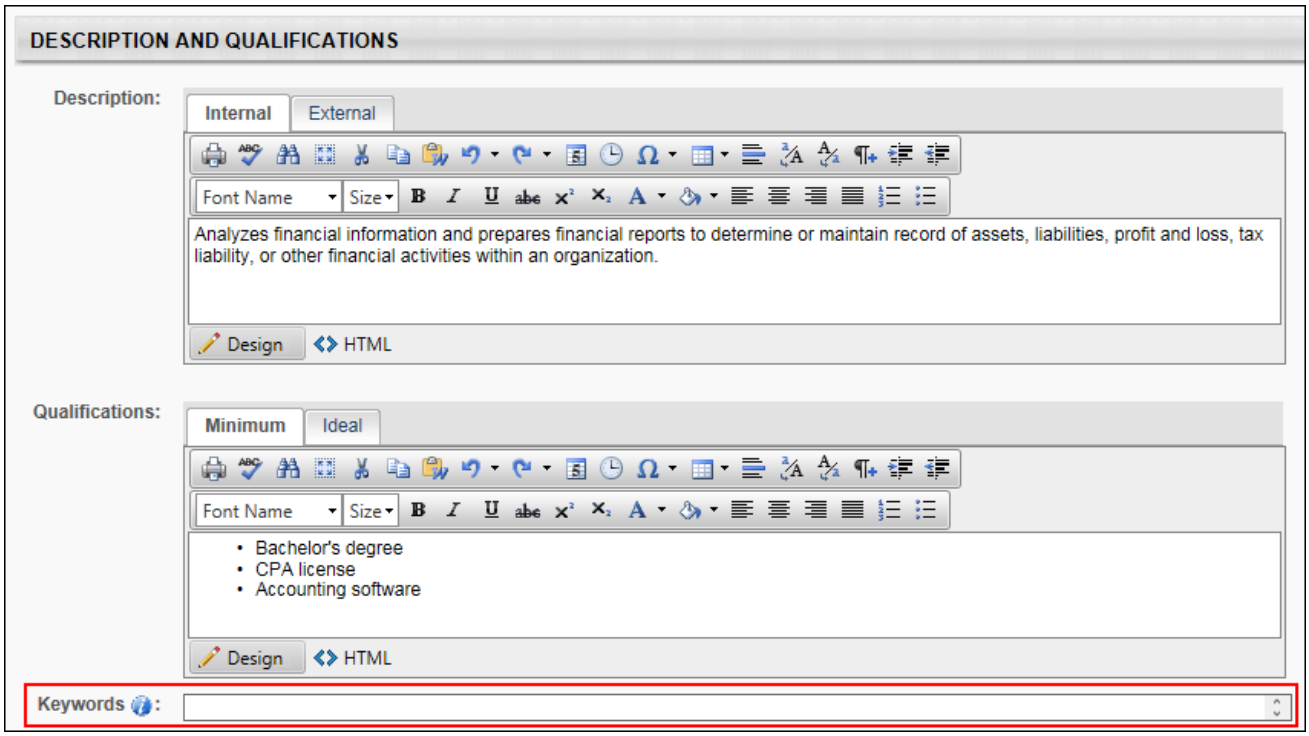
Note: *The* **External Sourcing** *option allows recruiters to search for applicants from external job boards in Broadbean. The* **External Sourcing** *option can be accessed from the* ***Manage Job Requisitions*** *page and the* ***Candidate Search Query*** *page.*

To create job requisitions, go to **Recruit > Manage Requisition**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Description	Grants ability to edit the internal and external descriptions for requisitions. This permission cannot be constrained. This permission must be used in conjunction with the **Requisition: Manage** permission. ***Note:*** *For requisition owners and managers who do not have this permission, when editing a job requisition, the requisition description section is read-only.*	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is*	Recruiting

	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



Keywords

Enter keywords into the **Keywords** field, up to 1000 characters. Separate each keyword by a comma, and then a space.

The keywords can be localized by selecting the desired language from the **View In** drop-down. Then, enter the translated keywords in the **Keywords** field.

Manage Job Requisitions - External Sourcing Option

An **External Sourcing** option is added to the options drop-down on the Manage Job Requisitions page. This option allows recruiters to open the Broadbean search page and search for applicants to add to a talent pool or invite to apply to the job.

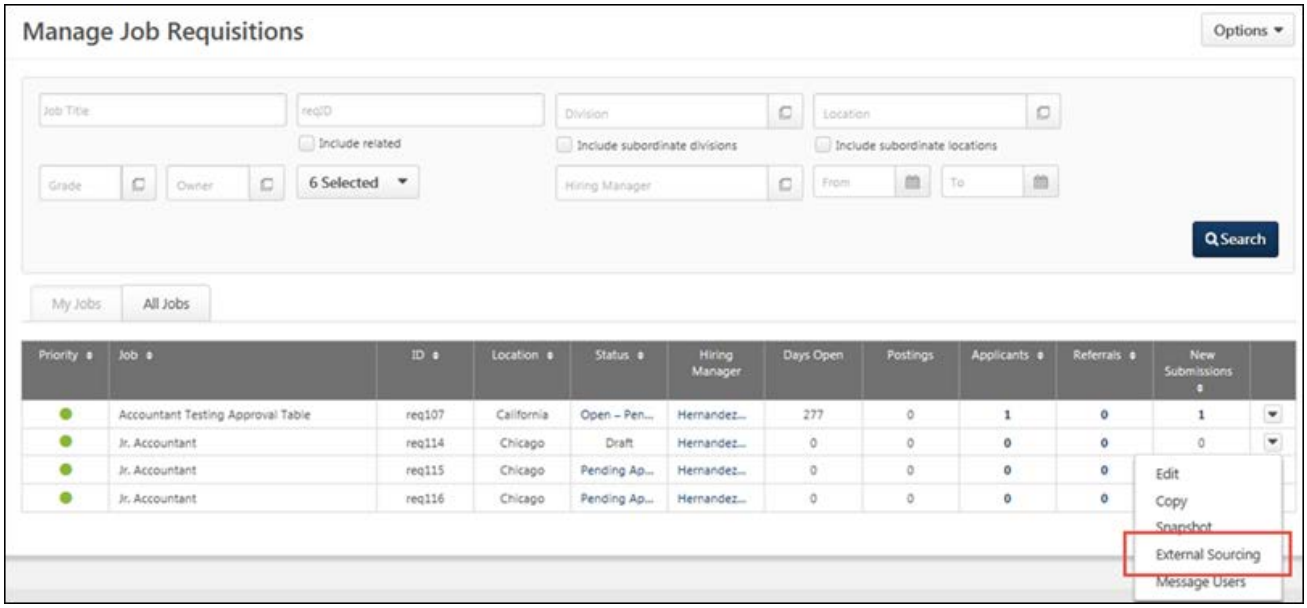
Error Note: *If your Broadbean account is not active, a message displays directing you to My Account > My Social Profiles in order to activate your Broadbean account.*

To manage job requisitions, go to **Recruit > Manage Requisition**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a	Recruiting

	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.*	



Candidate Search Query - External Sourcing Option

An **External Sourcing** option is added to the upper-right corner of the Candidate Search Query page. This applies to the Quick Search and Advanced Search tabs. This option allows recruiters to open the Broadbean search page and search for applicants to add to a talent pool or invite to apply to the job.

In addition, when searching for candidates, the system will also use the resume submitted by external candidates as part of the search.

To access the Candidate Search Query, go to **Recruit > Candidate Search Query**.

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
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

Job Boards - Search for Applicants

Recruiters can search for applicants on external job boards in Broadbean. See the following for the steps necessary to search for applicants via Broadbean:

Broadbean Account Requirements

You must have an account with Broadbean in order to use the External Sourcing feature.

Email Administration

With this enhancement, a Create Profile Invitation email is added to the Recruitment action type in Email Administration:

Permissions

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

Create Profile Invitation

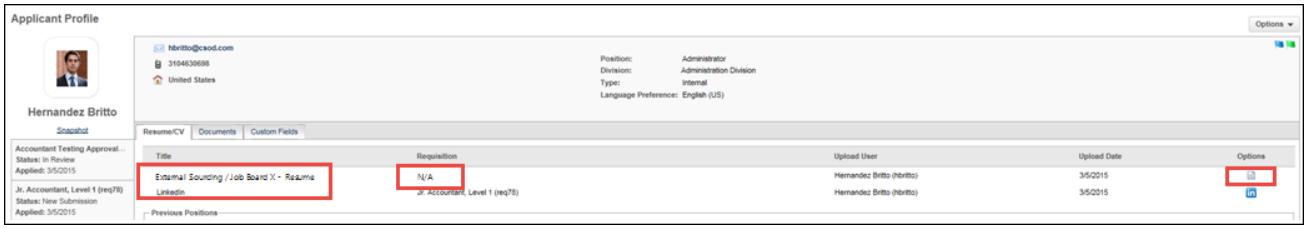
Email Tags

The following email tags are available for the Create Profile Invitation email (new tags appear in red):

Applicant Profile - Snapshot

When external applicants create a profile on the career site from the email invitation, their resume is saved on the Applicant Profile > Snapshot page.

With this enhancement, when a resume is sourced from Broadbean, the Title column displays as "External Sourcing/[Job Board Name - Resume." The Requisition column displays as "N/A."



Career Site Profiles

Contact Information and Resume

When applicants are invited to create a career site profile as a result of the **ADD TO TALENT POOL** action on Broadbean, the applicant's contact information is automatically entered on the career site. This saves the applicant from having to re-enter this information when creating a career site profile.

Creating a Profile

Applicants can create a profile using their email address. This reduces the possibility of duplicate applicants.

Note: *Applicants are required to create a profile if enabled by a backend setting. If the backend setting is disabled, then applicants are added to the talent pool without needing to create a profile on the career site.*

Delete Temporary Profile

When applicants are invited to create a career site profile as a result of the **ADD TO TALENT POOL** action on Broadbean, the applicant can choose not to create the profile and instead to delete their information from the organization's database.

In the Create Profile Invitation email, if the DELETE.CANDIDATE.INFORMATION tag is included by the administrator in the email, the tag displays as a link in the email. Applicants can click the link and choose to remove their temporary profile data from the organization. This opens a page where the applicant can click **YES** to delete or **CANCEL** to keep their information stored on the database. If they click **YES**, they are directed to the job search page of the career site.

Auto-Deletion of Temporary Profile

The external applicant's resume and data will be deleted from the Applicant Profile > Snapshot page after the set number of days, as defined by the administrator via a backend setting.

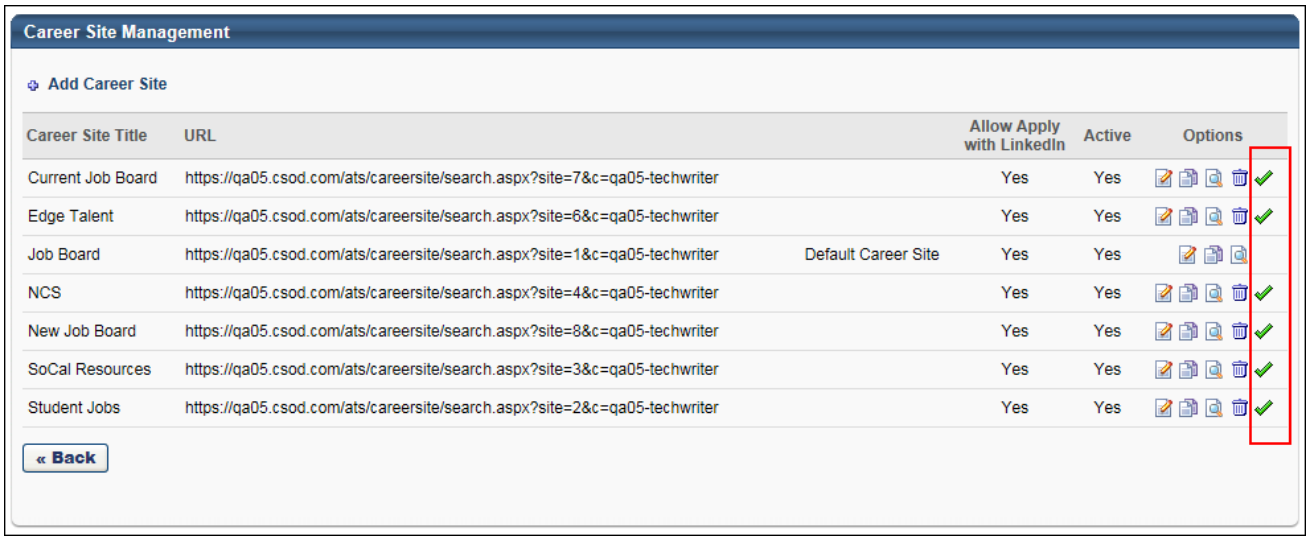
Career Site Management

With this enhancement, a Set as Default option is added to the Career Site Management page. This option allows administrators to select which career site they would like to be the default career site.

To manage career site pages, go to **Admin > Tools > Recruit >Career Sites**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration



Set as Default

The Set as Default icon displays as the far right option in the Options column. Click the icon to set the selected career site as the default site. This opens a confirmation pop-up. Click **YES** to set the career site as the default, or click **NO** to cancel the action.

The default career site is linked to from the DEFAULT.CAREER.SITE email tag.

Deactivate Default Career Site

When a career site is defined as the default site, it cannot be deactivated. Only career sites that are not the default can be deactivated.

Inactive Career Sites

Careers sites that are inactive cannot be defined as the default.

Auto-Designation as Default Career Site

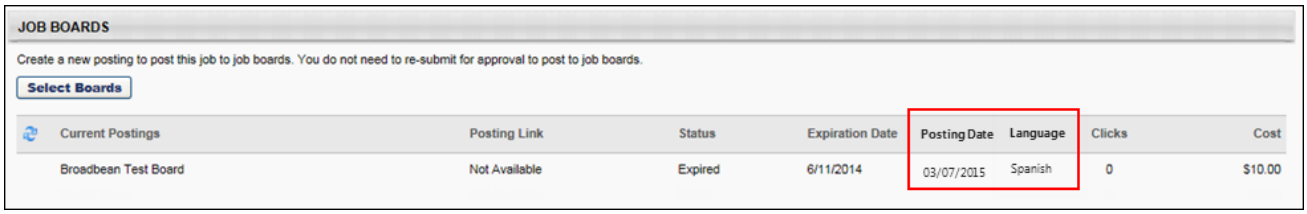
For career sites created after implementation of this enhancement, if the career site created is the first career site created for the portal in Career Site Management and the career site is defined as active, then that career site is automatically the default career site.

For current and future career sites, if the portal has no career sites defined as active, then the first career site created that is defined as active will be the default career site.

Multiple Language Support for Job Postings - Broadbean Integration

With this enhancement, the following updates are made to the External Postings tab when configuring job requisition postings to Broadbean:

- **Language Drop-Down** - When configuring Broadbean job postings, recruiters can now select which language to post the job in, based on the languages into which the job requisition has been translated. A language drop-down has been added to the Broadbean posting step to allow recruiters to choose the language. The localized job requisition will render correctly via Broadbean posting.
- **Posting Date Column** - A Posting Date column is added to the Job Boards section. This column displays the date on which the job was posted to Broadbean.
- **Language Column** - A Language column is added to the Job Boards section. This column displays the language in which the job was posted to Broadbean.



Use Cases

A recruiter created a requisition and localized it in three different languages. He needs to post the English version of the requisition to one job board and the Spanish version to a different job board. Therefore, he needs a way to select the language and the job board to which the requisition will be posted.

Security

The following existing permissions apply to this functionality:

Data Load Wizard - Support for Keyword and Cost Center OU in Job Requisition and Job Requisition Templates

This enhancement is in support of the Recruiting Usability Enhancements. *See* **Requisition Enhancements Overview** on page 528 *for additional information.*

With this enhancement, the Data Load Wizard supports two new fields through the Job Requisition and Job Requisition Template data loads, Keyword and Cost Center OU.

- Keyword - This field contains all keywords associated with the job requisition or job requisition template. This is a text field that accepts up to 1,000 characters. Any HTML is automatically removed. This field is optional.
- Cost Center OU - This field contains the Cost Center OU associated with the job requisition or job requisition template.

Implementation

The Job Requisition and Job Requisition Template data loads are not available for self-service.

- For organizations that would like to implement a Job Requisition and Job Requisition Template data load, please contact your Client Executive.
- For organizations that would like to include these fields in their existing Job Requisition and Job Requisition Template data load, please contact Global Product Support (GPS).

This functionality is only available to organizations using Recruiting and the Data Load Wizard.

Enhanced Job Requisition Web Service (REST)

With this enhancement, the following fields are now included in the Job Requisition web service response:

- Can Apply
- Career Sites
- Default Name
- Employment Status
- External Ad
- Ideal Qualification
- Internal Ad
- Job Responsibilities
- Management Group
- Management Group ID
- Mobile Ad
- On Going
- Requisition Template
- Requisition Template ID

In addition, this web service now supports localization. The default language for the web service administrator's account is used to determine the localized values for the response parameters.

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.

FADV Enhancements and Migrate FADV from IUP to Edge

FADV Enhancements and Migrate FADV from IUP to Edge

Overview

With this enhancement, First Advantage (FADV) integration is migrated to the Edge Marketplace. This allows organizations to purchase the FADV integration directly from Edge. Prior to this enhancement, FADV required a custom integration process that was managed through Global Product Support. After the initial set-up, clients will be able to make configuration changes to the integration directly within the Integration Center, as opposed to using GPS.

In addition, permissions are also being added to enable organizations to restrict and limit user access to initiating a background check, viewing background check results, and viewing background check details.

Use Case

1. Calvin would like to integrate First Advantage to the Applicant Tracking System (ATS) by purchasing an integration through Edge Marketplace.
2. Iliana, who is a Recruiter Intern, has the ability to initiate a background check for candidates, but she cannot see the background check results (whether or not a person passed/failed) and the details.
3. Roger the Recruiter has the ability to view background check results.
4. Rosanne the Recruiter has the ability to view background check results and the link to the background check vendor's website that contains additional background check information.

New Permissions

Permissions

The following new permissions have been added with this enhancement:

- **Applicants: Initiate Background Check** - This permission in the Recruiting category grants access to manage background checks from the Applicant Profile page. This applies to background checks that have been configured in the Integration Center. This permission cannot be constrained. Users who have this permission will have an Assign to Applicant link in the background check status type panel on the Applicant Profile page. Once the background check is assigned, the page will display "Assigned - [Date Assigned]." ***Note:*** *This permission allows users to no longer need to set background check status as "Sensitive." There is no impact to sensitive statuses that are currently set.*
- **Applicants: View Background Check Status** - This permission in the Recruiting category allows users to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained. ***Note:*** *This permission allows users to no longer need to set background check status as "Sensitive." There is no impact to sensitive statuses that are currently set.*
- **Applicants: View Background Check Status and Details Link** - This permission in the Recruiting category allows users to view the background check status and view a link to access the background check report, which can be found in the background check status type panel on the Applicant Profile page. This permission cannot be constrained. ***Note:*** *This permission allows users to no longer need to set background check status as "Sensitive." There is no impact to sensitive statuses that are currently set.*

Upon release, these permissions must be manually enabled by the administrator in Security Role Administration.

Roles

The following permissions are added to the Recruiting - Admin role:

- Applicants: Initiate Background Check
- Applicants: View Background Check Status
- Applicants: View Background Check Status and Details Link

Display Account Name and Account Number in Accounts/Packages Drop-Down

With this enhancement, the account name and account number will now be visible in the **Select Account** and **Select Package** drop-down in the Select Screening Program Option pop-up. Some organizations may have more than one account with the background check vendor and different types of background check packages. Being able to view the account name with the account number allows you to target the background check to the correct account and type of background check.

The Select Account drop-down values will show "Account_Number - Account Name" (e.g. 342423 - FADV)."

Note: *The Select Screening Program Option pop-up is accessed by clicking the* **Assign to Applicant** *link in the First Advantage (FADV) background check status type panel on the Applicant Profile > Statuses tab. See Applicant Profile - Assign First Advantage Screening for more information about the Select Screening Program Option pop-up.*

Google Analytics in Applicant Workflow

Organizations can now use Google Analytics to track applicants as they are going through career sites, job postings, and application workflows.

Prior to this enhancement, organizations had to insert their own custom footers to have Google Analytics tracking in their applicant-facing pages.

Google Analytics

Implementing Google Analytics in Recruiting can help recruiters figure out which devices people are using to visit career pages and the source they used to reach the career site or job posting, such as via a search engine. Google Analytics can also track the time spent on the career pages and where applicants made it to in the application workflow and more. Recruiters can then build more targeted campaigns over time to attract the type of applicants they want, as well as optimize career sites and application workflows to make sure they are maximizing the number of applications submitted.

When enabled, the recruiter can view analytics information for career sites, job postings, and application workflows.

Organizations that Currently Have Google Analytics Snippet on ATS Pages

For organizations that already have their own Google Analytics snippet inserted on their Applicant Tracking System (ATS) pages, it is recommended that the Google Analytics snippet be removed or that you do not enable the new classic Google Analytics feature for ATS. It will cause double tracking if the code is for the same Google Analytics account. If the code is for two different Google Analytics accounts, then the double tracking should not occur. In addition, if you decide to implement both classic Google Analytics and the new Universal Analytics on the same page, there should not be double tracking issues.

Use Cases

1. A recruiter is trying to hire social media marketers and lawyers. She has built a career site with a generic application workflow for social media and law positions.
2. The recruiter notices that she is getting a lot of applications for her law positions but is not getting very many for her social media positions.
3. She has Google Analytics implemented on the career site, as well as on the application workflow.
4. The recruiter analyzes the data in Google Analytics and realizes that people interested in the social media positions tend to access the career site via a mobile device and try to apply via mobile, but they cannot easily navigate the career site nor get through the application workflow on a mobile device.
5. The recruiter quickly optimizes the career site and enables the Apply with Mobile feature with a simpler application workflow. Following this change, she starts to see more social media marketing applicants.

Implementation

This functionality is controlled by backend settings, which are disabled by default. To enable this feature, contact Global Product Support. You will need to provide your Google Analytics and Google Universal Analytics tracking numbers for the accounts. You will also need to specify whether you are enabling Classic Analytics or Universal Analytics.

Inbound Data Feeds for Candidates and Applicants

With this enhancement, the Data Load Wizard now supports scheduling of inbound data feeds (IDF or recurring loads) for Candidates and Applications.

Implementation

The Application and Candidate data loads and data feeds are not available for self-service.

- For organizations that would like to implement an IDF for applications and candidates, please contact your Client Executive.

This functionality is only available to organizations using Recruiting and the Data Load Wizard.

Multiposting Integration

Multiposting Integration Overview

The Multiposting integration enables recruiters to post a requisition that has multiple language translations to multiple job boards that support multiple languages. Through an integration with Multiposting, recruiters can select the desired job boards from the External Postings page of the job requisition and post the job to more than one job board that supports multiple languages.

Recruiters will be able to see the latest statistics for each job board, as well as take actions such as edit the job posting, delete the job posting, and repost the job when the job posting expires.

Use Case

1. Peter is a Recruiter at a global organization and needs to recruit Sales Representatives in Mexico so that the company can expand in Mexico.
2. Peter has created a Sales Representative requisition that has already been translated into Spanish.
3. Peter needs to post this job to as many job boards as possible so that he can get maximum exposure to get the best Spanish-speaking sales representatives in Mexico.
4. Peter posts the job to five well-known Mexican job boards, making sure that the postings are available in English and Spanish.
5. Peter can see the status of his job postings on each of the job boards.
6. Peter can take actions like editing, deleting, or reposting the job depending on how the job posting does on each of the job boards.

Implementation

The Multiposting Job Posting integration requires Cornerstone Learning and a Multiposting account.

This integration is available in the Edge Marketplace. Once the integration has been purchased, the functionality is not available until the integration is configured and enabled via Edge Integrations.

Security

The following existing permissions apply to this functionality:

External Postings Page - Updates to Job Boards Section

With this enhancement, a **Job Board Vendor** drop-down is added to the Job Boards section on the External Postings page to enable recruiters to select the job board vendor, such as Multiposting.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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.	

Job Board Vendor Drop-Down

The **Job Board Vendor** drop-down displays the active job board integrations that are available to post the requisition. To select a vendor, click the drop-down and select the vendor from the list.

Once the vendor is selected, the options in the Job Boards section and the columns in the job boards table will change based on the vendor selected.

Note: *The* **Job Board Vendor** *drop-down only displays if there is at least one active job board integration, as configured.*

Multiposting Job Board Postings

The Multiposting integration allows recruiters to post a requisition that has multiple language translations to multiple job boards that support multiple languages. Through the integration, recruiters can select the desired job boards from the External Postings page of the job requisition and post the job to more than one job board that supports multiple languages.

Note: *For requisitions that have an approval workflow, postings cannot be made through Multiposting until the requisition is approved.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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*	Recruiting

	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.*	

Post Job

To post a job through Multiposting:

1. Select a default career site in the Career Sites section. This is required in order to post the job via Multiposting so that the posted jobs will be linked to the default career site.
2. Select **Multiposting** from the **Job Board Vendor** drop-down. This updates the options in the Job Boards section and the columns in the job boards table.
3. Click the **CREATE NEW POSTING** button. This opens a Multiposting window from which you can select the job boards and configure the posting. You must have a Multiposting account in order to post through Multiposting.

Once the job postings are configured, you can submit the requisition on the External Posting page.

Repost Job

The **REPOST JOB** button allows recruiters to repost a job posting. The button only displays if the active postings are in a Deleted, Error, or Expired status or is no longer active on any job boards.

To repost the job:

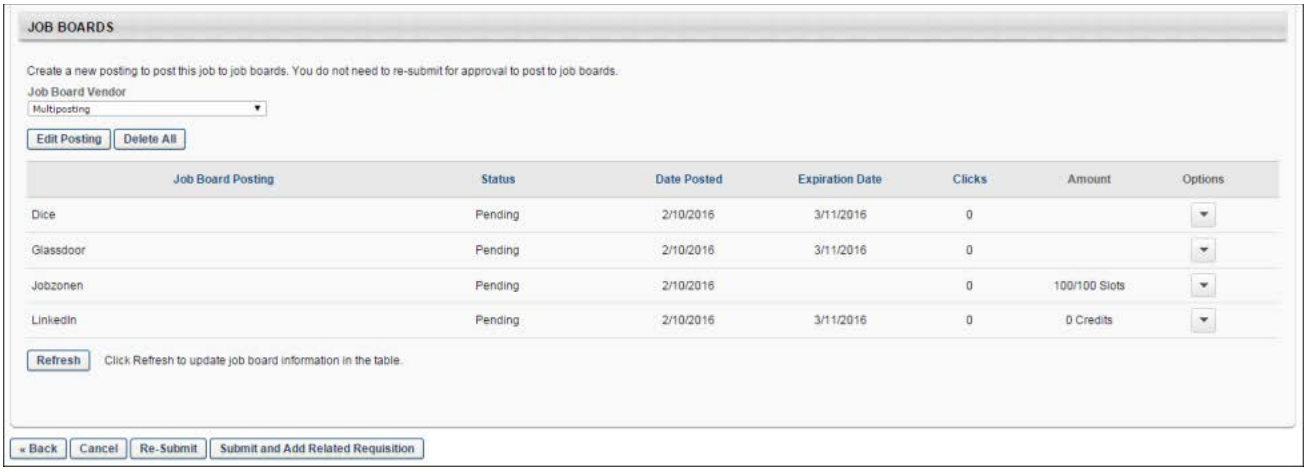
1. Click the **REPOST JOB** button. This opens a Multiposting window.
2. In the Multiposting window, you can edit any of the job details before reposting the job. Once you have finished making the changes in Multiposting, you will need to manually close the Multiposting window.
3. Then, click **REFRESH** on the External Postings page. This updates the job boards table to display the job boards to which the posting has been reposted. The status of the job boards changes to Pending or Active, and this enables the **EDIT POSTING** and **DELETE ALL** buttons to display. the **REPOST JOB** button will no longer display.

Job Boards Table

The following columns display in the job boards table when Multiposting is selected in the **Job Board Vendor** drop-down:

- Job Board Posting - This column displays the name of the job board to which the requisition is posted.
- Status - The following statuses of the job board display in the Status column:
  - Active
  - Deleted
  - Error
  - Expired

    - Pending
- Date Posted - This column displays the effective date of the job posting.
- Expiration Date - This column displays the date on which the requisition expires on the job board.
- Clicks - This column displays the number of clicks that the job board has received.
- Amount - This column matches the data in Multiposting and displays the correct amount type for the posting cost type entity. The amount displays in the user's language, if available.
    - Credits - This shows the remaining credits for the job board.
    - Slots - This shows the remaining/total slots for the job board.
- Options - The following options are available in the Options column:
    - Delete - You can delete a job posting that is in a Pending or Active status by clicking **Delete** from the options drop-down in the Options column. This opens a confirmation pop-up. Click **YES** to delete the posting, or click **NO** to cancel the delete action. Once the posting is deleted, click **REFRESH**. This updates the job board status to Deleted. The options drop-down is hidden when a job board is in a Deleted status.



Edit Posting

The **EDIT POSTING** button allows you to edit the posting in Multiposting. When clicked, the Multiposting window opens, where you can edit the posting. Once the updates are made, the job boards table on the External Postings page updates to display the latest data.

This button only displays once a job is posted via Multiposting.

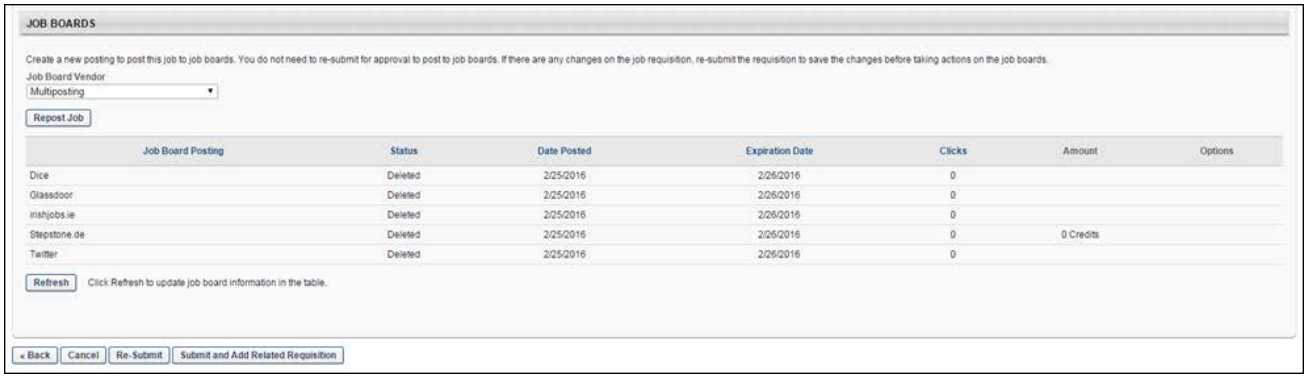
Refresh

The **REFRESH** button updates the job boards table to display the latest data from the job boards to which the job is posted.

Delete All

The **DELETE ALL** button allows you to delete all postings that are still pending and active on job boards. A confirmation pop-up opens. Click **YES** to delete the posting, or click **NO** to cancel the delete action.

The status for the job boards will change to Deleted when the **REFRESH** button is clicked.



Onboarding

Onboarding Manager Usability Enhancements

With this enhancement, the following Onboarding usability enhancements are made:

- **Email User's Future Manager** - The Integration Task Completed email can now be sent to "User's Future Manager." This allows an onboarding user's future manager to receive email notifications when integration tasks have been completed.
- **Integration Task Assigned Email** - This is a new email trigger. This email is triggered when a user is assigned an onboarding task. This email can be sent to Assignee or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management. The following email tags apply:
  - ACTION.DATE - Date that the action took place that triggers the email.
  - INTEGRATIONTASK.TITLE - Integration task title.
  - INTEGRATION.TITLE - Integration title.
  - RECIPIENT.DIVISION - Recipient’s division.
  - RECIPIENT.FIRST.NAME - Recipient’s first name.
  - RECIPIENT.LAST.NAME - Recipient’s last name.
  - RECIPIENT.POSITION - Recipient’s position.
  - INTEGRATION TASK.DUE.DATE - Integration task due date.
  - TASK.START.DATE - Task start date.
- **Onboarding Tab Visibility** - The Onboarding tab on the Universal Profile > Bio page will only display if a user is currently or has previously been through onboarding.
- **View Forms from Onboarding Tab** - Completed forms can now be accessed directly from a user's Onboarding tab on their Universal Profile > Bio page. Click the form title to open the form. Previously, forms could only be accessed from Snapshot > Documents.

Use Cases

Onboarding Tab Visibility

A Human Resources Manager is looking through the Universal Profile > Bio pages of various employees within the company. She can see the Onboarding tab for users who are currently onboarding or who have previously gone through onboarding. She cannot see an Onboarding tab for users who have not been through onboarding before.

Clickable Forms in Onboarding Tab

A Human Resources Manager is in charge of the onboarding process for new hires. She can go to the Onboarding tabs on the new hires’ Universal Profile > Bio page to see the progress of tasks for new hires. She is able to open the forms that the new hires have completed and quickly review the information that was entered on the forms.

Security

The following existing permissions apply to this functionality:

Increase Character Limit for Question User Comment

With this enhancement, when running Form Management Custom Reports or Onboarding Custom Reports, the character limit for the **Question User Comment** field is increased from 500 to 1200. The field appears in the Form Template section of these reports.

Prior to this enhancement, any part of a user's responses that went over 500 characters did not display in the report output.

Related April '16 Enhancement Note: *As part of a separate enhancement for the April '16 release, the name of the Form Template section is changing to Training Form Template. In addition, the permission names are changing. See* **Form Management Custom Report** on page 524 *for additional information.*

Security

The following existing permissions apply to this functionality:

(missing or bad snippet)(missing or bad snippet)

Reports - Onboarding in Custom Reports

Onboarding Custom Report

With this enhancement, an Onboarding Custom Report is now available in custom reporting. This report allows you to create customized reports on onboarding data. The onboarding data can be used to make informed decisions about where new hires are having trouble in the onboarding process.

To create an Onboarding Custom Report, go to **Reports > Custom Reports**. Then, click **Onboarding Report** in the **New** drop-down.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Onboarding Report - Create	Grants ability to create and edit custom Onboarding reports. This permission refers to creating custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics
Custom Onboarding Report - View	Grants ability to view results of custom Onboarding reports created by self or shared by others. This permission refers to viewing custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics
Form Approvals - Manage	Grants access to manage Form Approvals functionality. This permission cannot be constrained. This is an administrator permission. ***Note:*** *This permission enables access to the new Form Management functionality that is part of the Onboarding module. This permission does not grant access to the Old Forms Management functionality.*	Forms Management Administration

The following report sections are available, in addition to the User and Calculated Fields sections:

Onboarding

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Onboarding	Indicates whether or not an onboarding workflow is	Yes/No

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Workflow Active	active or inactive.	
Employer Assignee Email	The email address of the user who was assigned the Employer task for the I-9 integration task. This field will remain empty if the portal does not have an I-9 integration enabled for Onboarding.	Text
Employer Assignee ID	The user ID of the user who was assigned the Employer task for the I-9 integration task. This field will remain empty if the portal does not have an I-9 integration enabled for Onboarding.	Text
Employer Assignee Name	The name of the user who was assigned the Employer task for the I-9 integration task. The name is displayed in the format: Last Name, First Name. This field will remain empty if the portal does not have an I-9 integration enabled for Onboarding.	Text
Integration Provider	The integration provider of the integration. This field will remain empty if the portal does not have an I-9 integration enabled for Onboarding.	Text
Navigation Tab Extension	The navigation tab extension that was associated to the user's onboarding.	Text
Onboarding Progress	The onboarding progress of the user. This field displays the percentage completion of all onboarding tasks for the user's onboarding.	Numeric
Onboarding Status	The status of the user's onboarding. This field displays the overall status of a user's onboarding process.	Text
Onboarding Type	The type of onboarding the user is going through, either External or Internal.	Yes/No
Onboarding Workflow Title	The title of the Onboarding Workflow.	Text
Start Date	The employment start date of the user. This field displays the date that the user moves into their new job. The date displays in the format: MM/DD/YYYY.	Date
Onboarding Task Assignee Email	The email of the user who was assigned the onboarding task. This user can be a user other than the user who is onboarding.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Onboarding Task Assignee ID	The user ID of the user who was assigned the onboarding task. This user can be a user other than the user who is onboarding.	Text
Onboarding Task Assignee Name	The name of the user who was assigned the onboarding task. The name displays in the format: Last Name, First Name. This user can be a user other than the user who is onboarding.	Text
Onboarding Task Assignment Date	The date that the task was assigned. The date displays in the format: MM/DD/YYYY (00):(00) (AM/PM).	Date
Onboarding Task Due Date	The date that the task is due. The date displays in the format: MM/DD/YYYY (00):(00) (AM/PM).	Date
Onboarding Task ID	The ID of the onboarding task.	Text
Onboarding Task Status	The status of the onboarding task.	Text
Onboarding Task Title	The title of the onboarding task.	Text
Onboarding Task Type	The type of onboarding task.	Text
Onboarding User Future Division	The user's future division. The user's future division is the division they will be in once they reach their start date.	Text
Onboarding User Future Location	The user's future division. The user's future division is the division they will be in once they reach their start date.	Text
Onboarding User Future Position	The user's future position. The user's future position is the position they will be in once they reach their start date.	Text
Onboarding Future Manager Email	The user's future manager's email address. The user's future manager is the manager they will have once they reach their start date.	Text
Onboarding Future Manager ID	The user's future manager's user ID. The user's future manager is the manager they will have once they reach their start date.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Onboarding Future Manager Name	The user's future manager's name. The user's future manager is the manager they will have once they reach their start date. The name displays in the format: Last Name, First Name.	Text
Onboarding Future Approver Email	The email address of the user's future approver. The user's future approver is the approver they will have once they reach their start date.	Text
Onboarding Future Approver ID	The user ID of the user's future approver. The user's future approver is the approver they will have once they reach their start date.	Text
Onboarding Future Approver Name	The name of the user's future approver. The user's future approver is the approver they will have once they reach their start date. The name displays in the format: Last Name, First Name.	Text

Form

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Document Folder Name	The name of the document folder in which the completed form is stored. The document folder name is the name of the document folder in the Snapshot Documents widget.	Text
Form Active	Indicates whether a form is active or inactive.	Yes/No
Form Description	The description of the form.	Text
Form E-Signature Date	The date the form was electronically signed. The date displays in the format: MM/DD/YYYY (00):(00) (AM/PM).	Date
Form E-Signature Location	The location from which the form was electronically signed. The location is the IP address from which the form was electronically signed.	Text
Form E-Signature ID	The user ID of the user who electronically signed the form.	Text
Form E-Signature Name	The name of the user who electronically signed the form. The name displays in the format: Last Name, First Name.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Form ID	The ID of the form.	Text
Form Question	This displays as a column in the report output. The form question is the name of the column.	Text
Form Question Response	The response to a question.	Text
Form Submit Date	The date that the form was submitted. The date displays in the format: MM/DD/YYYY (00):(00) (AM/PM).	Date
Form Task ID	The ID of the form task.	Text
Form Task Instructions	The form task instructions.	Text
Form Task Title	The title of the form task.	Text
Form Title	The title of the form.	Text

Form Approval

This section only appears if form approvals are enabled in the portal and is only available for users with permission to manage form approvals.

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Form Approval Comment	The approval comments that are provided by approvers as they are completing form approval requests. This field should only display if form approval is enabled in the portal. Ex: This field is filled out incorrectly. Please correct.	Text
Form Approval Request Completed Date	The date that the form approval request was completed. The date displays in the format: MM/DD/YYYY (00):(00) (AM/PM). This field only displays if form approval is enabled in the portal.	Date
Form Approval Request Received Date	The date that the form approval request was received by the approver. The date displays in the format: MM/DD/YYYY (00):(00) (AM/PM). This field only displays if form approval is enabled in the portal.	Date

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Form Approval Request Title	The title of the form approval request. This field only displays if form approval is enabled in the portal.	Text
Form Approval Status	The approval status of a form. The approval status indicates the overall approval status for a form. This field should only display if form approval is enabled in the portal.	Text
Form Approver Email	The email of the user that is the approver. This field should only display if form approval is enabled in the portal.	Text
Form Approver ID	The user ID of the user that is the approver. This field should only display if form approval is enabled in the portal.	Text
Form Approver Name	The name of the user that is the approver. The name displays in the format: Last Name, First Name. This field should only display if form approval is enabled in the portal.	Text

Form Management Custom Report

With this enhancement, the following changes are made to the Form Management Custom Report in order to distinguish this report from the new Onboarding Custom Report:

Report Name Change

Section Name Changes

Field Name Changes

Permission Name Changes

Note: *The permission changes will be visible in Online Help upon release of this enhancement.*

On Boarding Custom Report

With this enhancement, the following changes are made to the On Boarding Custom Report in order to distinguish this report from the new Onboarding Custom Report:

Report Name Change

Field Name Changes

Permission Name Changes

Note: *The permission changes will be visible in Online Help upon release of this enhancement.*

Recruiting Usability Enhancements

With this enhancement, the following usability improvements are made to the Applicant Tracking System (ATS):

- **Application Workflow** - Pre-screening questions can now be created from within the application workflow. A **CREATE QUESTION** button is added to the Add Question pop-up when configuring the application workflow in application workflow templates, requisition templates, default requisition templates, and job requisitions. Clicking the button opens the **Create Question steps** within the Add Question pop-up. Once the question is added, the question is available to select for Prescreen Question sections on the application workflow. The button only displays with permission to manage the Pre-Screening Question Bank. New Questions are saved to the Pre-Screening Question Bank. ***Best Practice:*** *It is a best practice to search through existing questions before creating a new question so that similar or nearly identical questions are not created.*
- **Candidate Search Opt-Out Prevention*** - An **Applicant Opt-Out** option is added to the Compliance Preferences section of Requisition and Applicant Preferences. When this option is unchecked, the opt-out option does not appear on the Applicant Profile page or the Submit Application step of the application workflow. Any applicants who opted out before the option was disabled will remain opted out. Any applicants who previously opted out can decide to opt in on their Career Site > My Profile page (when the opt-out option is disabled by the administrator, the unchecked box is still visible on their profile). If the applicant decides to opt in while the administrator setting has been disabled, the applicant will not be able to change their opt-in selection while the administrator has the opt-out option disabled in Requisition and Applicant Preferences.
- **Career Sites > My Profile Page*** - The text for the opt-out option on the Edit Profile page is updated to clarify the functionality of the option. The text now reads: "Consider me for other positions and allow my application to be searchable." The option is checked by default when applicants create an account.
- **Career Site > Application Workflow*** - The text for the opt-out option on the Submit Application step of the application workflow is updated to clarify the functionality of the option. The text now reads: "Consider me for other positions and allow my application to be searchable." The checkbox is selected by default if the applicant has not opted out in their most recent (previous) application and if they have not opted out on their My Profile page.
- **Career Site Searching** - Applicants can now search for jobs on the career site using keywords. The keywords are defined when the job requisition is configured.
- **Custom Email Message** - When configuring the custom message for the EMAIL.CUSTOM.MESSAGE tag, the Custom Message field is updated to include a full text editing control with HTML. This applies to creating a custom message for the **Send Email from Template** action item on the Manage Applicants page and configuring disposition emails in **Requisition and Applicant Preferences**. This does not apply to the **Send Email from Template** option on the Applicant Profile > Summary page.

- **Manage Applicants** - When vertically scrolling on the applicants table, the column headers will now remain visible, regardless of whether you are at the top of the applicants list or at the bottom.
- **Manage Job Requisitions** - You can now hit the Enter key on your keyboard from the **Job Title** and **ReqID** fields to execute a search on the Manage Requisition page.
- **Manage Job Requisitions** - The filter selections on the Manage Job Requisitions page will remain selected, even after you log out of the portal. Upon returning to the page, the previous filter selections display so that you do not need to reset the selections. ***Note:*** *If you deselect all statuses, then the default statuses will be automatically selected upon returning to the page.*
- **New Submissions Page** - A Total Pre-Screening Score column is added to the New Submission page. This column displays the applicant's total pre-screening score, which can help recruiters see how well an applicant scored compared to other applicants. The score displays the total score out of the total possible score and also shows the score as a percentage.
- **Pre-Screening Questions - Screen Out Option** - Administrators can now define more than one answer as correct when **configuring Multiple Choice Single Answer questions** on the Create/Edit Question page for pre-screening questions. The checkbox in the Correct column can be selected to the right of each answer to indicate that an answer is correct. If the screening option is enabled for the question in the application workflow, then when an applicant selects any of the correct answers, they are not screened out of the application process.
- **Resume/CV Review Page** - A **View Applicant Profile** link is added to the upper-right corner of the page. Click the link to open the Applicant Profile page.
- **Resume/CV Review Page** - Applicant and Application flags are now visible on the Resume/CV Review page. The flags display to the right of the applicant rating. Clicking a flag opens the **flag details pop-up**. Flags can also be added or removed by clicking the Edit icon to open the Select Flags pop-up.

**This functionality will not be available in Stage environments for the April '16 release until Week 3 of User Acceptance Testing (UAT).*

Security

The following existing permissions apply to this functionality:

Requisition Usability Enhancements

Requisition Enhancements Overview

With this enhancement, the following requisition enhancements are made:

- Requisition custom fields on the requisition and requisition request can be set as read-only or editable.
- New custom fields can be created in Requisition and Applicant Preferences.
- Cost Center organizational unit (OU) can now be viewed on a requisition, requisition template, and requisition request.
- Custom field data entered in the Position OU is copied over to the requisition template.

Use Cases

An administrator wants to pre-populate certain custom field values on the requisition template and does not want recruiters to make edits to the fields when they are creating or editing the requisition. She configures the fields to be read-only.

Security

With this enhancement, the description for the *Application Custom Fields - Manage* permission is modified to indicate that the permission also grants access to the Applicant Custom Fields and Application Custom Fields sections of the Requisition and Applicant Preferences page. The permission description will be updated in Online Help upon implementation of this enhancement.

The following existing permissions apply to this functionality:

Requisition and Applicant Preferences

With this enhancement, administrators can now create new custom fields directly from the Requisition and Applicant Preferences page. In addition, a Read-Only column is added to the Requisition Custom Fields section in Requisition and Applicant Preferences.

To access Requisition and Applicant Preferences, go to **Admin > Tools > Recruit**. Then, select **Requisition and Applicant Preferences** from the General Recruitment section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Application Custom Fields - Manage	Grants ability to create and edit custom fields used for Applicant and Application. This permission also grants access to the Applicant Custom Fields and Application Custom Fields sections of the Requisition and Applicant Preferences page. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Organizational Unit Custom Fields - Manage	Grant Access to create and edit custom fields for Org Units. This is an administrator permission.	Core Administration
Requisition Preferences - Manage	Grants ability to access and manage Requisition Preferences. This permission cannot be constrained.	Recruiting Administration
Self-Registration and User Record Custom Fields - Manage	Grants access to manage custom fields for user Self Registration and the user record in Custom Field Administration. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

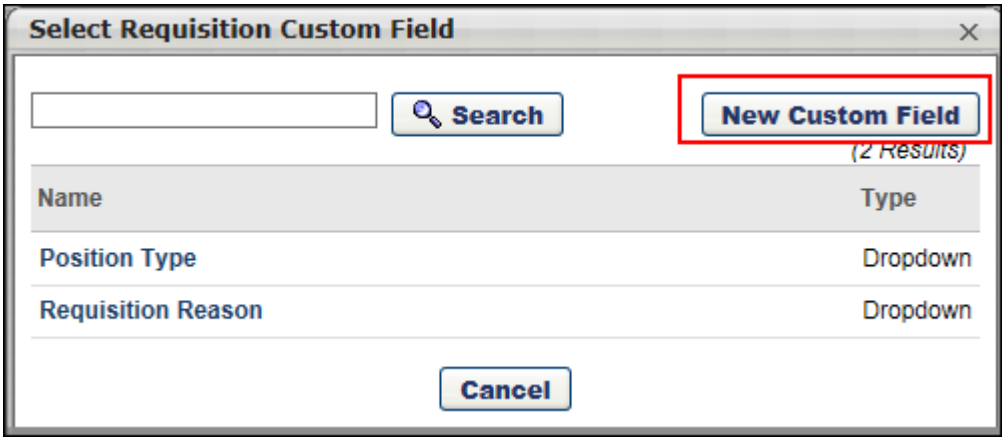
Note: *The permission description for Application Custom Fields - Manage will be updated in Online Help upon implementation of this enhancement.*

Create New Custom Fields

A **NEW CUSTOM FIELD** button is added to the Select Requisition Custom Field pop-up for Applicant, Application, and Requisition custom fields. This option allows administrators to create new custom fields directly from the Requisition and Applicant Preferences page.

- For Applicant custom fields, clicking the **NEW CUSTOM FIELD** button opens the Custom Field Administration > User > Define Field page. *See User Record and Self Registration Custom Fields.*

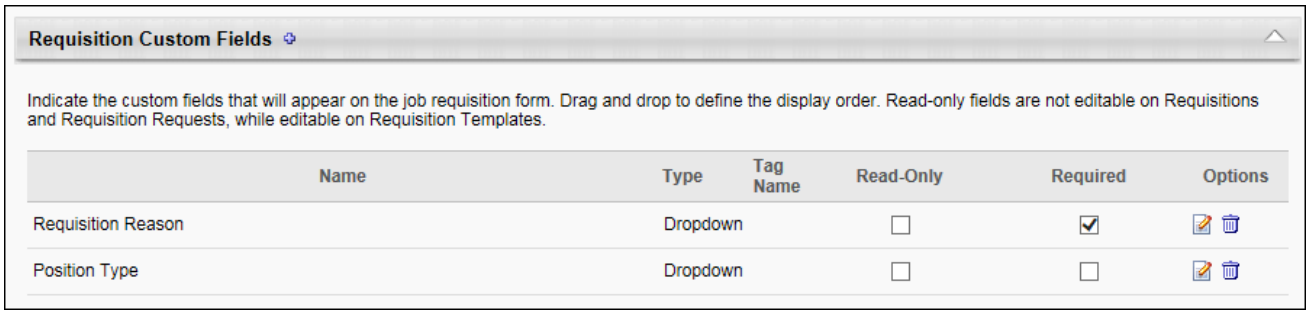
- For Application custom fields, clicking the **NEW CUSTOM FIELD** button opens the Custom Field Administration > Application > Define Field page. *See Custom Field Admin - Application.*
- For Requisition custom fields, clicking the **NEW CUSTOM FIELD** button opens the Custom Field Administration > Organizational Units > Define Field page. *See Custom Field Admin - Organizational Units.*



Read-Only Column

A Read-Only column is added to the Requisition Custom Fields section in Requisition and Applicant Preferences. This field is unchecked by default. When unchecked, the requisition custom field can be modified when used in a requisition. When checked, the field cannot be modified when creating and editing job requisitions and requisition requests.

Note: *Even if the custom field is defined as read-only, the value in the field can still be modified when configuring requisition templates and default requisition templates.*



Requisition Templates

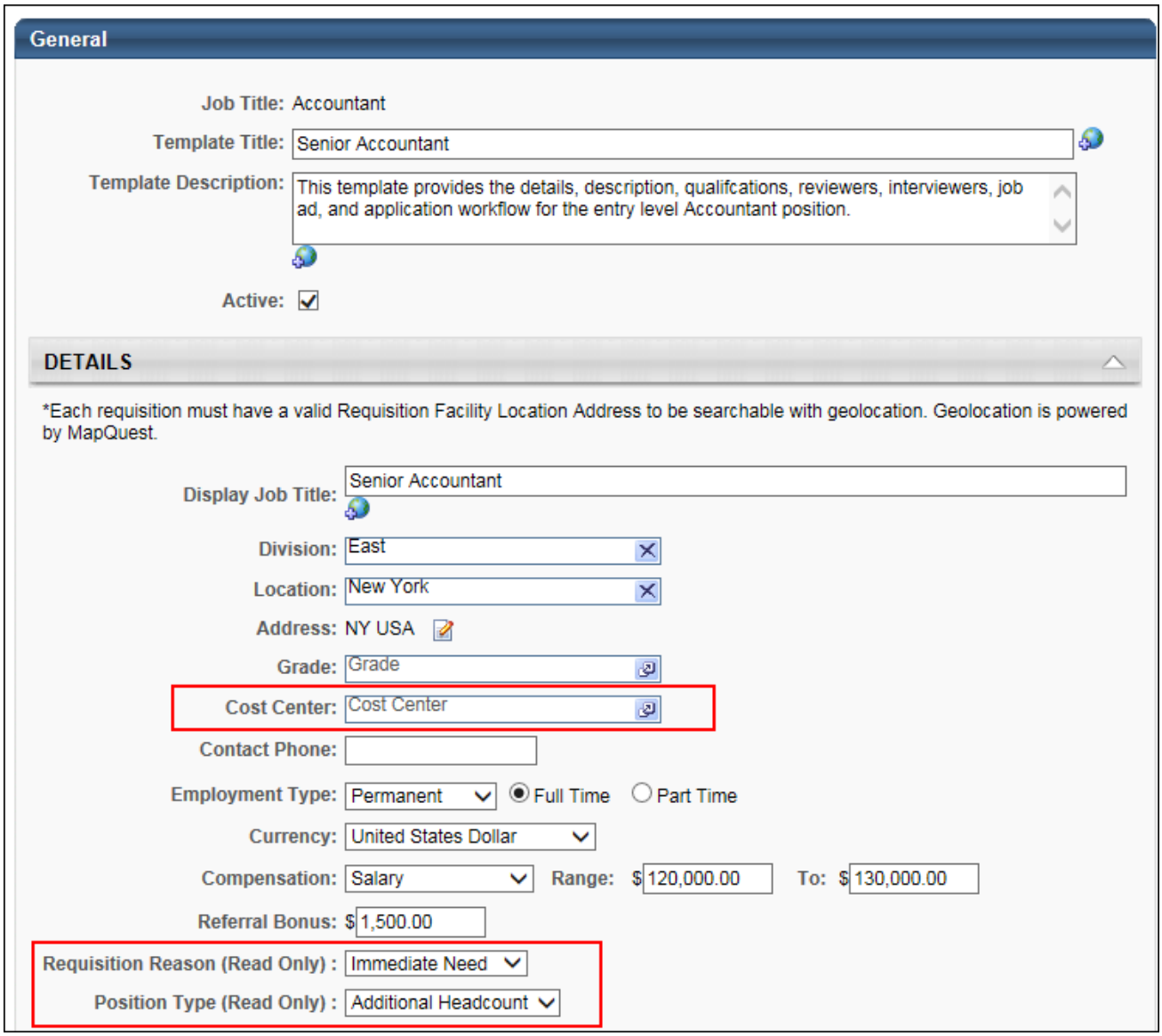
With this enhancement, a **Cost Center** organizational unit (OU) field is added to the Details section for requisition templates.

In addition, if the administrator has configured a Requisition custom field as read-only in **Requisition and Applicant Preferences**, then the field is designated as read-only on requisition templates.

To access Requisition Templates, go to **Admin > Tools > Recruit > Requisition Templates**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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



Cost Center

The **Cost Center** field is added to the Details section. This field allows you to select a cost center for the requisition template. This is not a required field.

Read Only Custom Fields

With this enhancement, administrators can configure requisition custom fields as read-only in **Requisition and Applicant Preferences**. If a field is read-only, then "Read Only" displays in parentheses to the right of the field name. The value in the field can be modified on the requisition template, but it cannot be modified in job requisitions or requisition requests.

Note: *As with existing functionality, custom fields do not display on default requisition templates.*

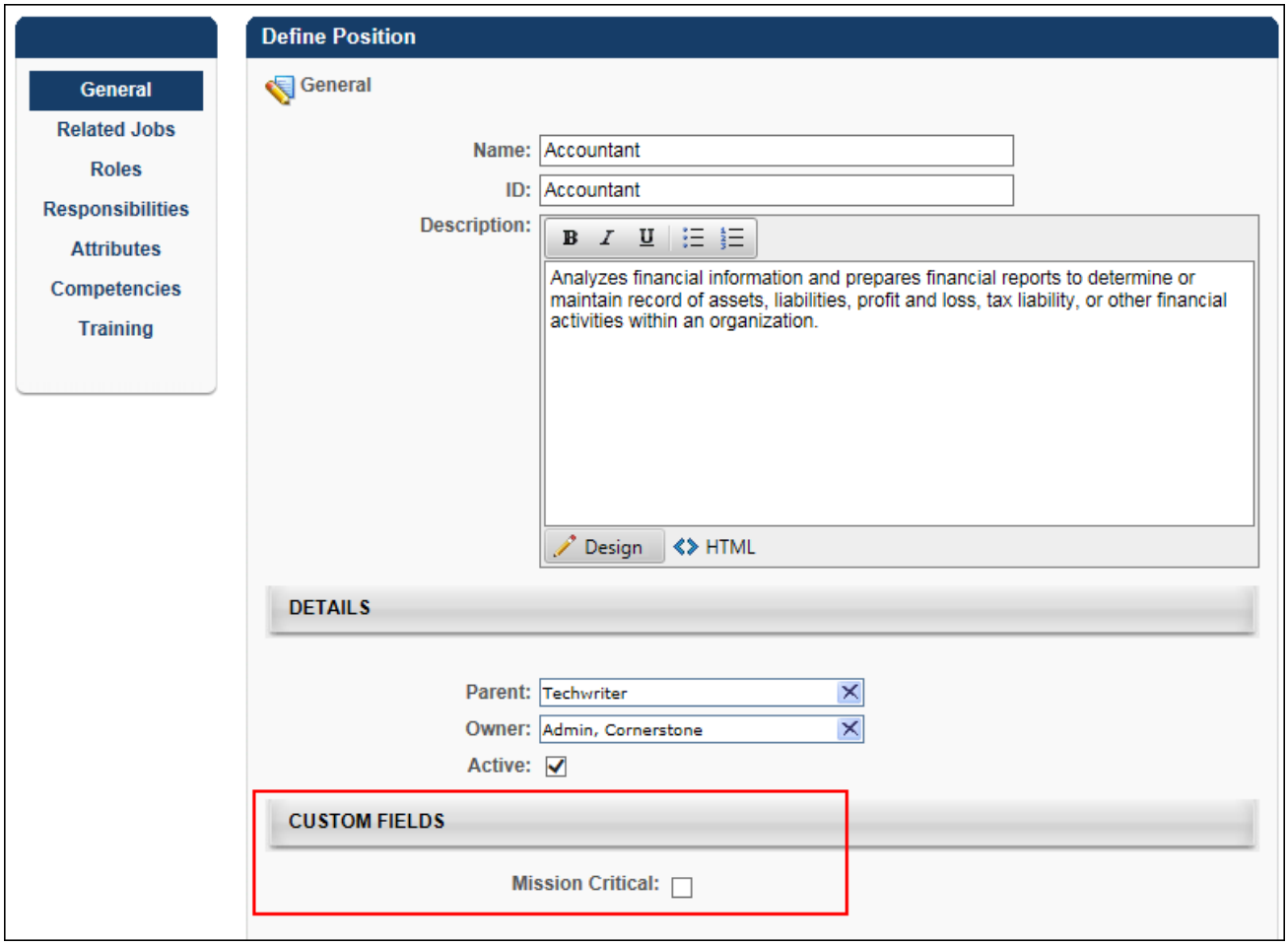
Position Organizational Unit

With this enhancement, custom field data entered in the Position OU is copied over to the requisition template.

To access the Position OU page, go to **Admin > Tools > Core Functions > Organizational Units > Manage Organizational Unit Hierarchy**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units and custom groups. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration



Create Job Requisition - Cost Center and Read-Only Custom Fields

With this enhancement, a **Cost Center** organizational unit (OU) field is added to the Details section for job requisitions.

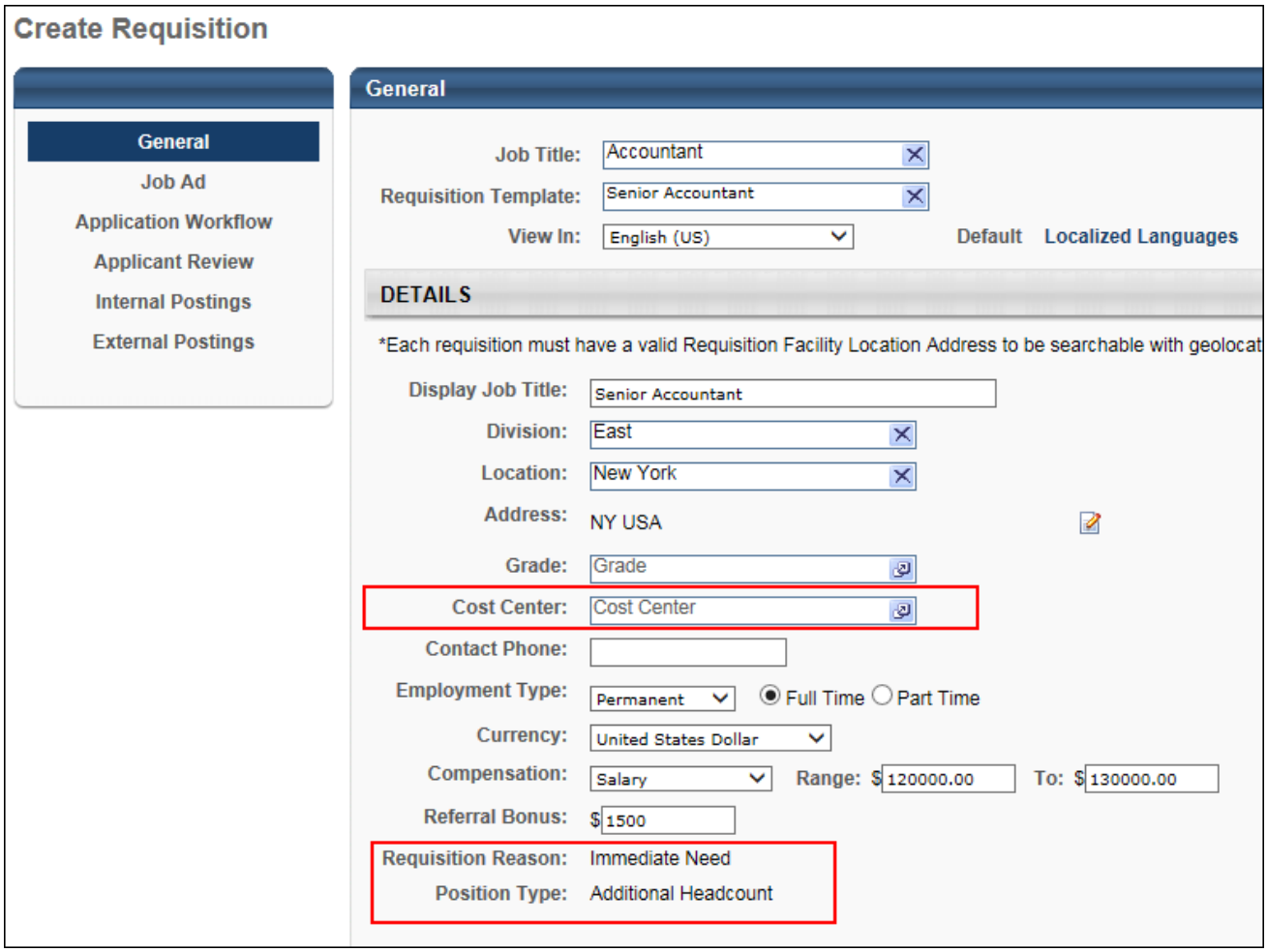
In addition, if the administrator has configured a Requisition custom field as read-only in **Requisition and Applicant Preferences**, then the field displays as read-only on the requisition. The value in the field cannot be modified.

To create job requisitions, go to **Recruit > Manage Requisition**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a	Recruiting

	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.*	



Cost Center

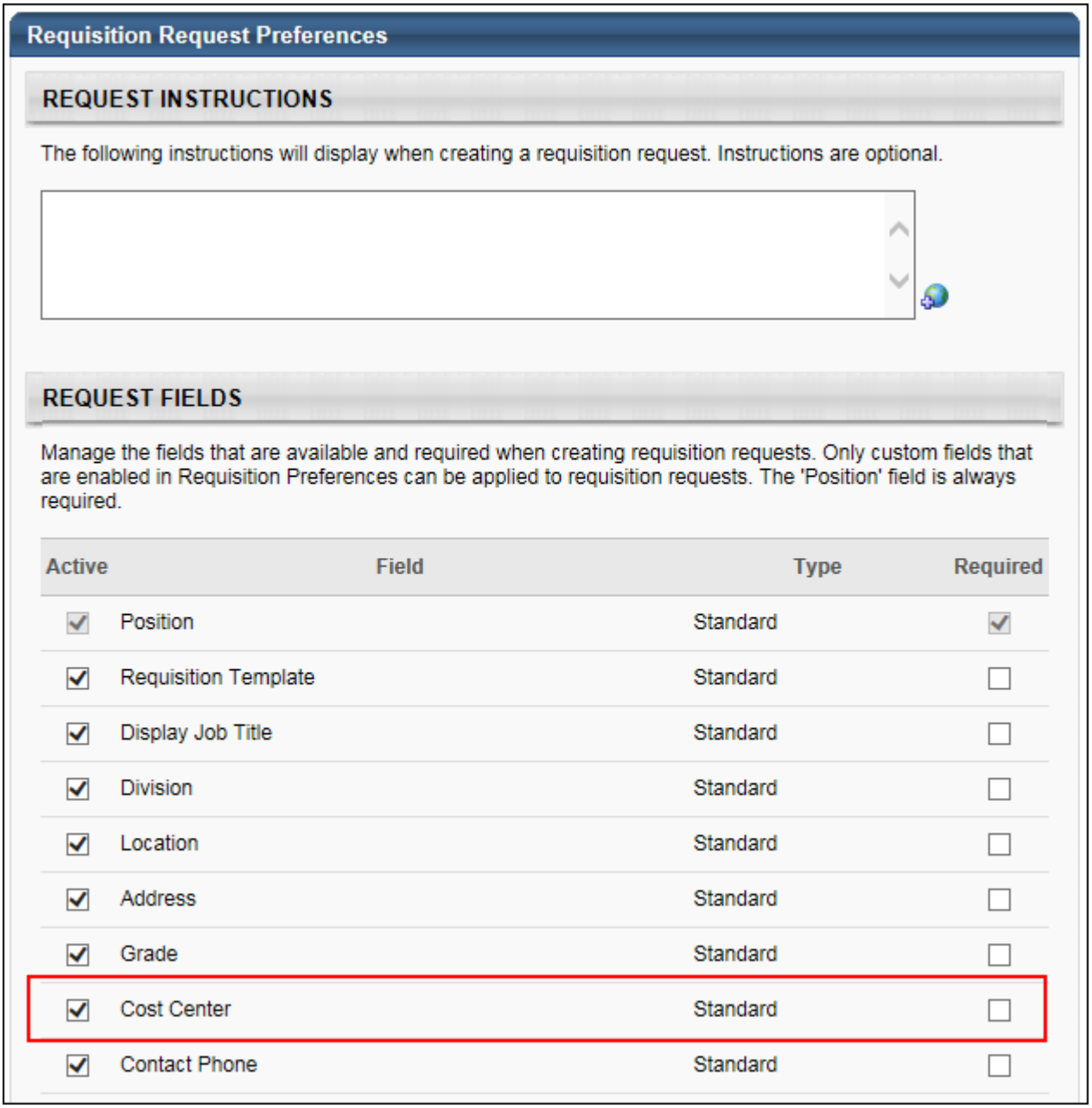
The **Cost Center** field is added to the Details section. This field allows you to select a cost center for the requisition. This is not a required field.

Read Only Custom Fields

With this enhancement, administrators can configure requisition custom fields as read-only in **Requisition and Applicant Preferences**. If a field is read-only, then the value in the field cannot be modified.

Requisition Request Preferences

A **Cost Center** field is added to Requisition Request Preferences. This field can be selected as active to display on requisition requests. The field can be selected as required to be completed on requisition requests.



Requisition Requests

With this enhancement, administrators can configure requisition custom fields as read-only in **Requisition and Applicant Preferences**. If a field is read-only, then the value in the field cannot be modified on requisition requests. The field will display as read-only.

In addition, a **Cost Center** organizational unit (OU) field may be available in the Details section if enabled by the administrator in **Requisition Request Preferences**. If the field is designated by the administrator as required, then the field must be completed when creating a requisition request.

To access the Requisition Requests page, go to **Recruit > Requisition Requests**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition Request: Select Users	Grants ability to select requisition owners, reviewers, and interviewers when creating requisition requests. This permission can be constrained by OU and User's OU. The constraints define which users are available when selecting users for requisition requests.	Recruiting
Requisition Request: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	Recruiting

SEO for Career Sites and Job Postings

SEO for Career Sites Overview

With this enhancement, career sites and job postings can be better optimized for search engines. Clients will also be able to determine whether specific career sites should be indexed by search engines. The meta page title and meta page descriptions for career sites and job postings can be customized to help attract potential applicants that search for jobs via search engines.

Prior to this enhancement, organizations could not customize page titles and descriptions for Career Sites and Job Postings. They also could not block search engines from indexing career sites that were used for internal job postings.

Use Case

1. A recruiter creates two career sites: one for external job postings and one for internal job postings.
2. The recruiter wants to make sure that the external career site is optimized for search engines so that external applicants will be more likely to find the external job posting.
3. The recruiter configures SEO settings on the external career site.
4. The recruiter configures a setting on the internal career site to make sure that the internal job postings will not be indexed by search engines and will be unsearchable by external applicants.

Security

The following existing permissions apply to this functionality:

Allow Search Engines to Index Site

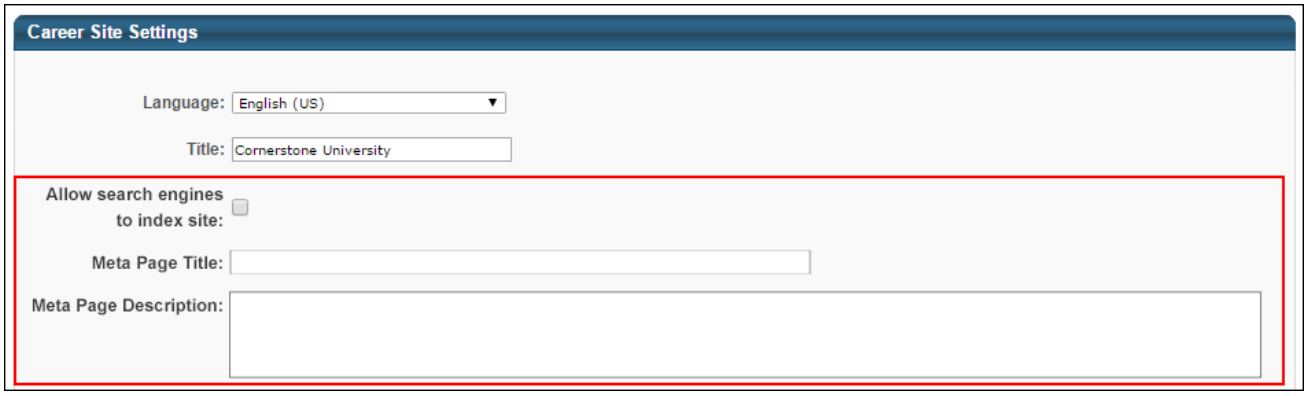
A new field, **Allow search engines to index site**, is added to the Career Site Settings section on the Create Career Site page. This field is unchecked by the default and allows administrators to select whether or not to allow search engines to index the career site.

When unchecked, a meta tag is added to the page meta that prevents search engines from crawling the pages and subpages. When checked, a meta tag is updated to allow search engines to crawl the page.

To create a career site, go to **Admin > Tools > Recruit > Career Sites**. Then click the **Add Career Site** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration



Meta Page Title and Description

With this enhancement, the meta page title and description for job postings can be customized, which is needed to optimize career sites for search engines. Optimizing career sites can also help the career site rank higher in search engine results for potential applicants that search for jobs through search engines instead of by going to an organization's job page on their website.

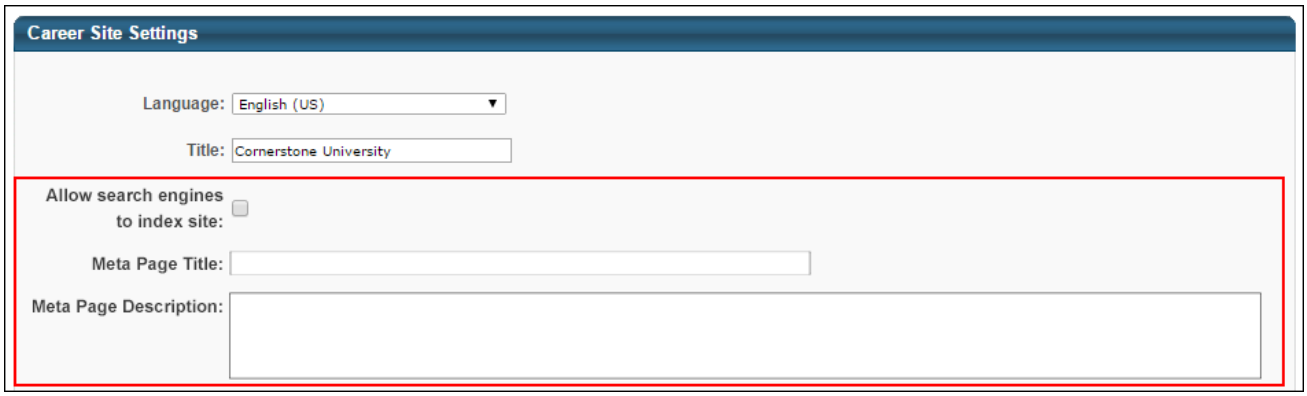
The meta page title and description can be defined in the following areas of the Applicant Tracking System:

- Career Site Administration > Create/Edit/Copy Career Site > Career Site Settings section
- Manage Job Requisitions > Create/Edit/Copy Job Requisition > External Postings page

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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	Recruiting

	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.*	



Meta Page Title

Enter a meta page title, up to 50 characters. On the Create Career Site page, the title can be defined in the languages available for the portal by selecting a different language in the **Language** field and entering the translated meta page title in the field.For job requisitions, if multiple languages are enabled for the portal, you can translate the title into the available languages by clicking the Translate icon and entering the translations for the desired languages.When applicants search for the job in search engines, the search results will display the job in the applicant's language, if available.

Meta Page Description

Enter a meta page description, up to 150 characters. On the Create Career Site page, the description can be defined in the languages available for the portal by selecting a different language in the **Language** field and entering the translated meta page description in the

field.For job requisitions, if multiple languages are enabled for the portal, you can translate the description into the available languages by clicking the Translate icon and entering the translations for the desired languages.When applicants search for the job in search engines, the search results will display the job in the applicant's language, if available.

Static URL Enhancement

Static URL Enhancement Overview

With this enhancement, recruiters will be able to share job search results and lists of applicant resumes using a static URL that can be sent via email or embedded in a button on a career site. The URL can be accessed without needing to log in to the career site. The job sharing URL can be accessed without needing to log in to the career site, and the resume sharing URL can be accessed via single sign-on (SSO) or normal log-in (if not already logged in), navigating directly to the Resume/CV Review page.

Prior to this enhancement, applicants were able to search for specific jobs with criteria, such as job title and req ID, but recruiters could not post a button on their career site, landing page, job board, or email in order to bring applicants directly to a list of job search results that the recruiter wanted to feature. Hiring managers were able to review applicants in the Applicant Tracking System (ATS), but recruiters were not able to send hiring managers a link to a list of hand-picked applicants so that the hiring managers did not have to spend time navigating through the system and screening the applicants themselves.

Use Cases

General

- An organization wants to get more out of their career site by featuring certain job types.
- An organization wants its hiring managers to be able to review a short list of applicants chosen by the recruiters.

Specific

- Brianna is an HR manager at Acme, Inc. and wants to improve visibility for certain high-priority requisitions. She places a highly visible link on the landing page of the career site, which directs applicants to a pre-configured set of job search results in order to feature those open positions.
- Summer has an open requisition to fill a vacancy on her team. She is extremely busy, does not use the ATS frequently, and wants to quickly review candidates that are recommended to her by the recruiting team.

  Veronica, a recruiter at Acme, Inc., chooses some of the high-potential applicants that she thinks Summer would be interested in and sends Summer a quick email through the system that contains a link to review the applicants' resumes. This way, Summer does not have to search for those high-potential applicants in the system herself.

Glossary

- Static URL - This means that content on the page will be based on the elements selected at the time the link was created.

Security

The following existing permissions apply to this functionality:

Manage Applicants - Send Resume Review Link

A **Send Resume Review Link** action type is added to the **Actions** drop-down on the Manage Applicants pages. This option allows recruiters to send an email with a link to review those applicants.

Use Case

Summer has an open requisition to fill a vacancy on her team. She is extremely busy, does not use the ATS frequently, and wants to quickly review candidates that are recommended to her by the recruiting team.

Veronica, a recruiter at Acme, Inc., chooses some of the high-potential applicants that she thinks Summer would be interested in and sends Summer a quick email through the system that contains a link to review the applicants' resumes. This way, Summer does not have to search for those high-potential applicants in the system herself.

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 applicants. From there, click the linked number of applicants 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*	Recruiting

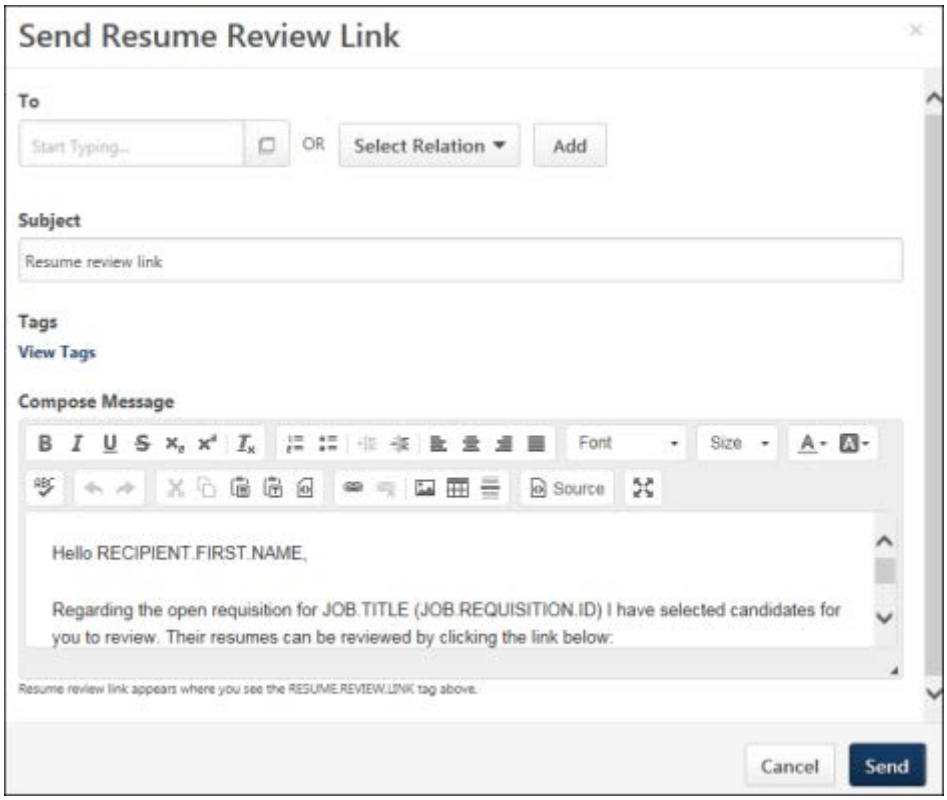
	Requisition: Manage *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants 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

Send Resume Review Link Action Type

This option allows recruiters to send an email with a link to review a pre-defined list of applicants on the Resume/CV Review page.

To email a resume review link:

1. Select the applicants on the Manage Applicants page who will be included for review. ***Note:*** *External applicants cannot be added.*
2. Click the **Send Resume Review Link** on the Manage Applicants page. This opens the Send Resume Review Link pop-up.



3. Complete the following fields and information in the pop-up:

- **To** - Select the recipients by entering a name in the predictive search field or selecting users from the Select a user pop-up. Click **ADD** to add the selections.
- **Select Relation** - Selecting a relation sends the email to the user or users who are defined as the applicant reviewer, hiring manager, or requisition owner. You can select any or all of the relationships in the drop-down. Relations can be selected in addition to individual users. Click **ADD** to add the selections.
- **Subject** - The subject line is pre-populated. Modify the subject line, as needed, up to 255 characters.
- **View Tags** - Click the **View Tags** link to view the tags available for the email.
- **Message Body** - The message body is pre-populated. Modify the message, as needed. There is no character limit. The message must include the RESUME.REVIEW.LINK tag, which provides recipients with the link to access the Resume/CV Review page with the list of applicants.

Once the fields are completed, click **SEND**. This sends the email to the recipients. The recipients can click the resume review link in the email to open the Resume/CV Review page, which will display the list of pre-defined applicants for review. Recipients will not need to log in to the system from the email link if they are already logged in.

The recipients will only be able to view the resume data for applicants to whom they have availability access. If a recipient does not have access to any of the applicants, then the recipient is redirected to an access denied page.

Applicant Profile Page - History

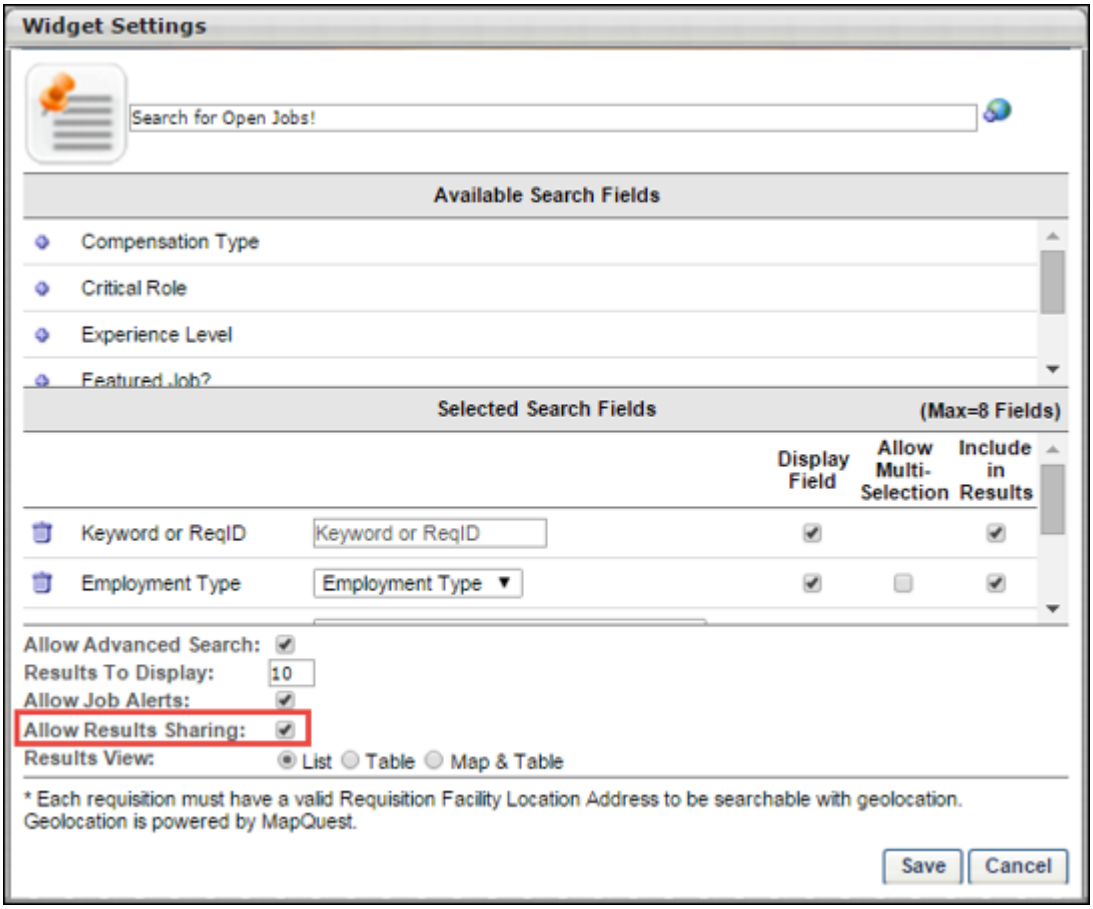
When an applicant is included in the **Send Resume Review Link** action type from the Manage Applicants page, the email event is logged on the History tab of the applicant's profile.

- Event Title - This column displays the name of the event as "Resume Review Link Sent."
- Details - This column displays the list of all recipients to who the email was sent.
- 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.

Job Search Widget - Allow Results Sharing

An **Allow Results Sharing** option is added to the Widget Settings pop-up for the Job Search widget. When checked, this option enables the **Share Search** link to display on the career site. When unchecked, the link is hidden on the career site. The option is unchecked by default.

Note: *Disabling the* **Share Search** *link after users have generated and shared a link to job search results does not disable the shared link. The shared search results can still be viewed if the* **Share Search** *link is disabled.*

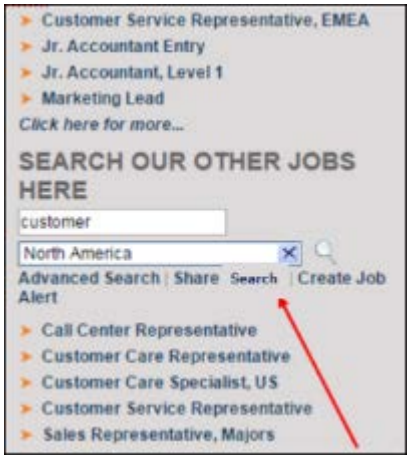


Career Site - Job Search Results Link

You can now generate a static link to a list of predefined job search results and can share the link with others or embed the link in a button on the career site landing page. The link opens the job search results that you generated so that you can highlight featured jobs. When the link is accessed, search results are displayed immediately based on the predefined criteria. Users do not have to click **Search** in order for the search results to display.

To generate a link:

1. Conduct a job search on the career site.
2. Once the search results display, click the **Share Search** link.



3. Clicking the **Share Search** link opens a Share Search pop-up. The link displays in a text box in the pop-up. Copy the link in the text box.
4. Click **DONE**.

You can now share the link or embed it in a button, perhaps on the career site landing page or another page in order to feature jobs based on the linked search criteria. This can be done by configuring the HTML on the page to include this link as the target when the button is clicked. When the link is accessed, the job search results display based on the search criteria associated with the link.

Note: *If the content or status of the jobs changes after the link is generated, the search criteria associated with the link may not generate the same exact results that were present when the link was created.*

Talent Pools

Talent Pools Overview

With this enhancement, the Manage Talent Pools functionality is redesigned with a new user interface (UI) and the integration of Recruiting features. For portals with Recruiting, talent pools can now be used to source applicants for job requisitions. Candidates can be added from Manage Applicants and can be added to job requisitions from within the Manage Talent Pools page.

Use Cases

- A Human Resources Manager wants to create talent pools of strong candidates to be developed and promoted within the organization. She wants to be able to share these pools with hiring managers and recruiters.
- A recruiter wants to develop a short list of internal and external candidates for a high-priority position in order to select the best talent in support of her hiring manager's needs. She wants to be able to add high-potential candidates to open requisitions and communicate with them, if needed.

Considerations

The option to **Add to Talent Pool** in Search Candidates is being removed with this enhancement. The option will no longer be available in the **ACTIONS** drop-down on the search results page upon implementation of this enhancement.

Implementation

The Talent Pools redesign is enabled for all portals with Succession and/or Recruiting in Stage environments. The redesign will be enabled by request in Production portals via a work order. For the July '16 release, the redesign will be automatically enabled for all portals.

Recruiting and Succession

For portals with Recruiting and Succession, the full Talent Pools functionality will be available.

Recruiting Only

For portals with Recruiting only, the Succession actions will still display in the talent pools (Create Groups, Nominations, Development Plans). However, development plans will not be useable since a development plan would not be set up for portals that do not have Succession.

Succession Only

For portals with Succession only, the Recruiting actions (Add to Requisition) will not display.

Security

With this enhancement, the *Talent Pools - Manage* permission description will be updated to include the ability to add candidates to a job requisition. The permission description updates will be visible in Online Help upon implementation of this enhancement.

The following existing permissions apply to this functionality:

Navigation Tabs and Links

For portals that have Recruiting but that do not have Succession, the **Manage Talent Pools** navigation sublink is available to add to a navigation tab in Navigation Tabs and Links Preferences. Adding the sublink will make the Manage Talent Pools page accessible from the navigation tab to which it is added.

For portals that have both Recruiting and Succession, the **Manage Talent Pools** sublink can only be added to one navigation tab. For example, the link can be added to the Recruit tab so that recruiters can quickly access the page.

To access Navigation Tabs and Links, 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

Manage Talent Pools

The Manage Talent Pools page displays the talent pools you have created or that have been shared with you. From here, you can view and edit the talent pool. You can also share and delete talent pools.

The Manage Talent Pools page can be accessed by selecting **Manage Talent Pools** from the sublink in the navigation tab to which the link has been added. Administrators can add the **Manage Talent Pools** sublink in **Navigation Tabs and Links Preferences**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Talent Pools - Manage	Grants ability to create and manage Talent Pools. This permission also grants access the ability to add candidates to a job requisition. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration

Create Talent Pool

The **CREATE TALENT POOL** option allows you to add a new talent pool. To create a talent pool:

1. Click **CREATE TALENT POOL**. This opens the Create Talent Pool pop-up.
2. Enter a name for the talent pool, up to 50 characters.
3. Click **SAVE**. This adds the talent pool to your list of talent pools.

Talent Pools List

Talent pools display in order of most to least recently added. The following information displays for the talent pools:

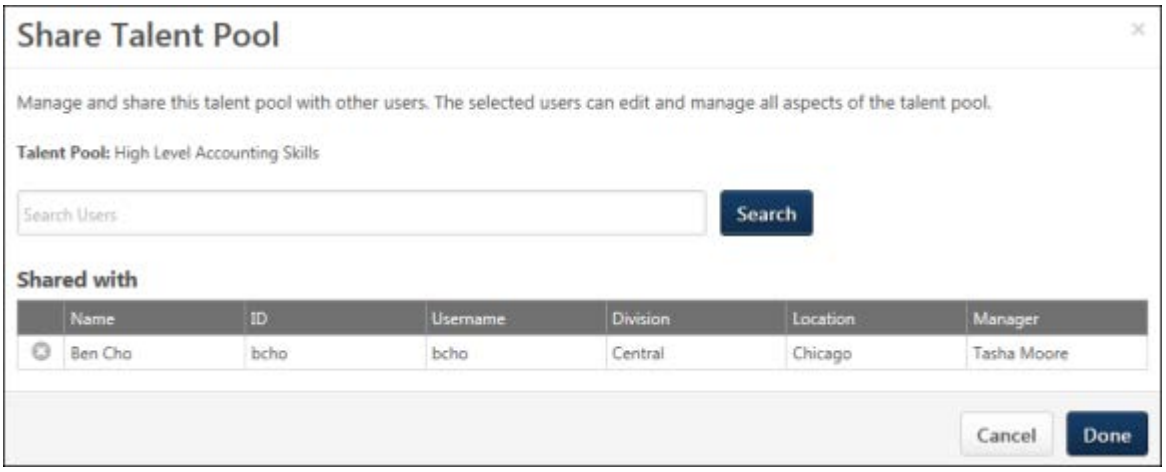
- Name - The name of the talent pool is a clickable link. Click the name to view and edit the talent pool.
- Date Created - This field displays the date on which the talent pool was created.
- Creator - This field displays the name of the talent pool creator.
- Options - The following options are available from the drop-down to the right of the talent pool:

- **Edit** - Click **Edit** to view the talent pool and make changes to it, such adding users, changing the talent pool name, or creating a nomination list. This opens the **talent pools page** for the talent pool.
- **Share** - Talent pools can be shared so that other users can provide their input in managing and promoting the users in the talent pool. This option does not display for users with whom a talent pool has been shared.

  Click **Share** to share the talent pool. This opens the Share Talent Pool pop-up. Search for and select the users with whom to share the pool. Once the users have been selected, click **DONE**. This shares the talent pool with the selected users.
- **Delete** - This option only displays for the talent pool creator. Click **Delete** to delete the talent pool. This opens the Delete Talent Pool pop-up. Click **YES** to delete the talent pool. This removes it from the creator and any users with whom the talent pool has been shared. Or, click **NO** to close the pop-up without deleting the talent pool.

View Shared Talent Pool Users

To view the users with whom a talent pool has been shared, click the **Share** option in the drop-down to the right of the talent pool on the Manage Talent Pools page. This opens the Share Talent Pool pop-up. The list of users displays in a *Shared with* section at the bottom of the pop-up.



View Shared Talent Pools

For users with whom a talent pool is shared, they can view the talent pool by clicking the **Manage Talent Pools** sublink from the navigation drop-down. This opens the Manage Talent Pools page, from which they can see a list of all talent pools that have been shared with them. They can also see who shared the talent pool with them and view the details of each talent pool by clicking the name of the talent pool.

Edit Shared Talent Pool

For users with whom the talent pool is shared, they can edit the talent pool by clicking the Edit icon in the drop-down to the right of the talent pool name. This opens the **details page for the talent pool**.

View Talent Pool

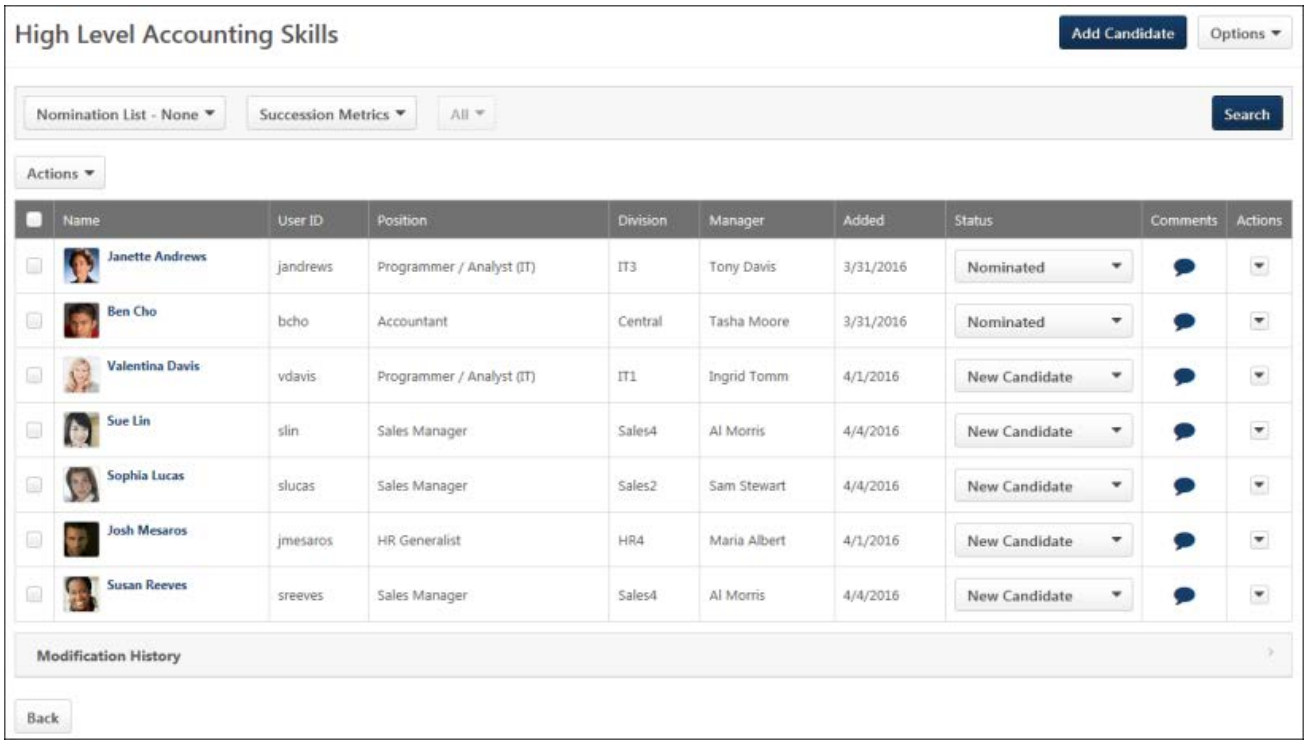
The talent pool page allows you to view the candidates in the talent pool and perform actions for the candidates, such as adding them to a job requisition. You can also view their status in the talent pool and create and manager nomination lists.

The options that are available will differ for portals that only have Succession or only have Recruiting. For portals that have both Succession and Recruiting, the full functionality of talent pools will be available.

Users must have permission to manage talent pools in order to view the Manage Talent Pools page and have access to the features and functionality for talent pools. For portals with Recruiting and Succession, recruiters and hiring managers must have permission to manage talent pools in order to access and manage the Manage Talent Pools page.

Permissions

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
Talent Pools - Manage	Grants ability to create and manage Talent Pools. This permission also grants access the ability to add candidates to a job requisition. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration



Add Candidate

The **ADD CANDIDATE** button allows you to add candidates to the talent pool. To add candidates:

1. Click the **ADD CANDIDATE** button. This opens the Add Candidate pop-up.
2. Search for candidates using the search option.
3. Select candidates from the Available Users table.
4. Click **DONE**. This adds the candidates to the talent pool. The status of the candidates is New Candidate.

Add Nominee

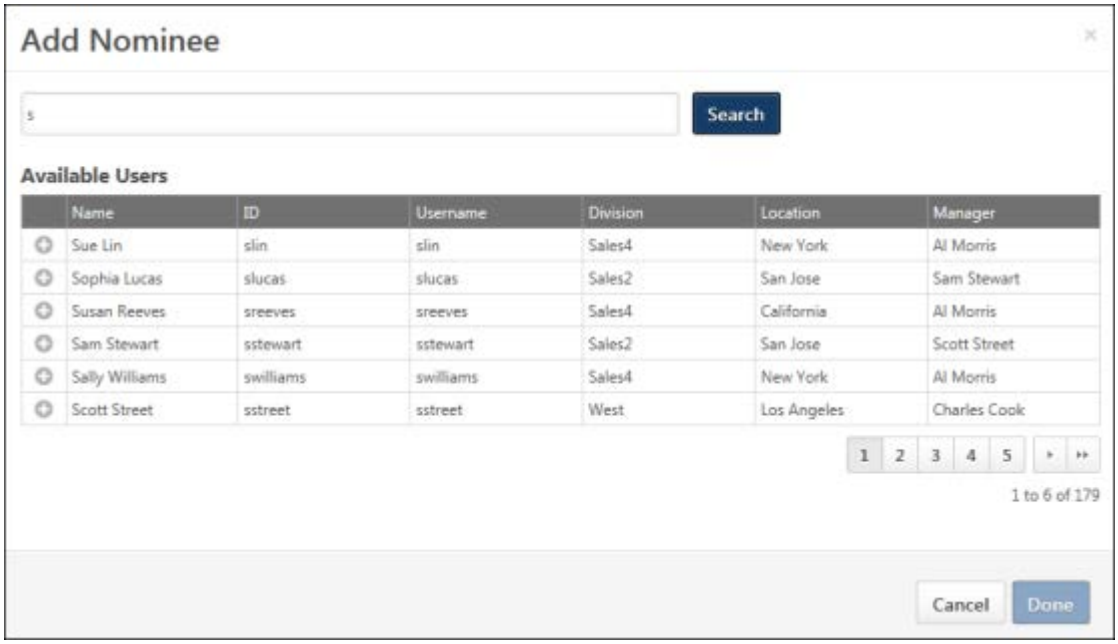
The **ADD NOMINEE** button allows you to add nominees to the nomination list. Nomination lists allow you to categorize candidates by a certain qualification or skill. When nominees are added to a nomination list but are not currently in the talent pool, they are only added to the nomination list and are not also added to the talent pool.

The **ADD NOMINEE** button only displays if the talent pool is filtered by a nomination list. Filtering by a nomination list changes the name of the **ADD CANDIDATE** button to **ADD NOMINEE**.

To add a nominee to the nomination list:

1. Click the **ADD NOMINEE** button. This opens the Add Nominee pop-up.
2. Search for candidates using the search option.
3. Select candidates from the Available Users table.

4. Click **DONE**. This adds the candidates to the nomination list. The status of the candidates changes to Nominated.



Options

The following options are available in the **Options** drop-down:

- **Edit Name** - Click **Edit Name** to change the name of the talent pool. This opens the Edit Name pop-up. Enter the changes into the text field, and then click **SAVE**. This saves the changes to the name.

Filters

The following filters are available:

- **Nomination List Status** - Select a nomination list status to filter the candidates by their status in the nomination list. The page is updated to show only the candidates who are in the selected nomination list status. The filter is disabled if a nomination list has not yet been created. When filtered by a nomination list, only the **Assign Dev Plan**, **Create Group/Add to Group**, and **Remove** options are available in the Actions column.
- **Succession Metrics** - Select a succession metric to filter the candidates by a specific metric. The metrics that display are the metrics that are available to the user.
- **Metric Rating** - Once the metric is selected, you can also filter by the metric rating. Select the rating from the drop-down to the right of the metric. The **All** option is selected by default. Only active metric ratings display in the filter. If a candidate does not have a rating but meets the metric criteria, then the candidate will display in the list.

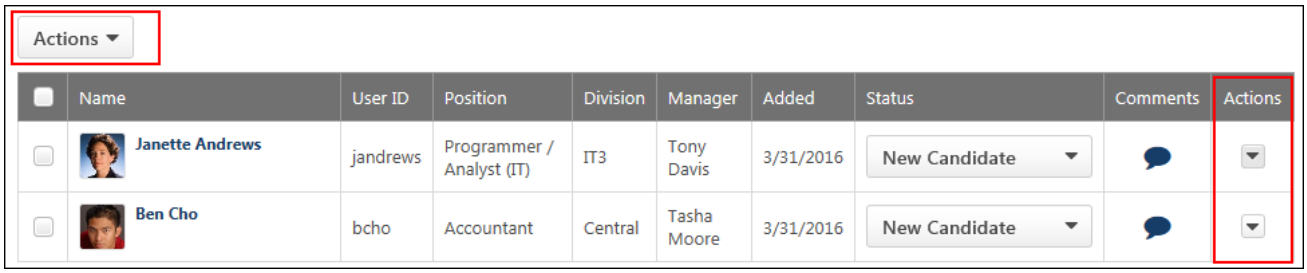
Once the filters are defined, click **SEARCH**. This updates the table to display the candidates who match the criteria.

Actions

The **ACTIONS** drop-down allows you to apply actions to candidates, such as adding to groups and adding to a requisition. You can perform bulk actions by using the **Actions** drop-down above the candidates table. Or, you can perform actions on individual candidates from the drop-down in the Actions column in the table.

Note: *The* **Assign Dev Plan** *action is only available for portals with Succession. The* **Add to Requisition** *action is only available for portals with Recruiting.*

Note: *The* **Create Group** *option displays if there a group has not yet been created for the talent pool. Once a group has been created, the* **Create Group** *option is replaced by the* **Add to Group** *option.*



Nominate

The **Nominate** action allows you to add candidates to an existing nomination list. Or, you can create a new nomination list to which to add the selected candidates.

To add candidates to a nomination list:

1. Select one or more candidates.
2. Click the **Nominate** option from the **ACTIONS** drop-down. This opens the Nominate Candidate pop-up.

3. Create a new nomination list by entering a name for the list in the **Create List** field, up to 50 characters.

4. Or, select the **Add to existing list** option to add the candidates to an existing list. Then, select the list from the drop-down.
5. Click **SAVE**. This saves the new list and adds the candidates to the list. Or, this saves the candidates to the existing list.

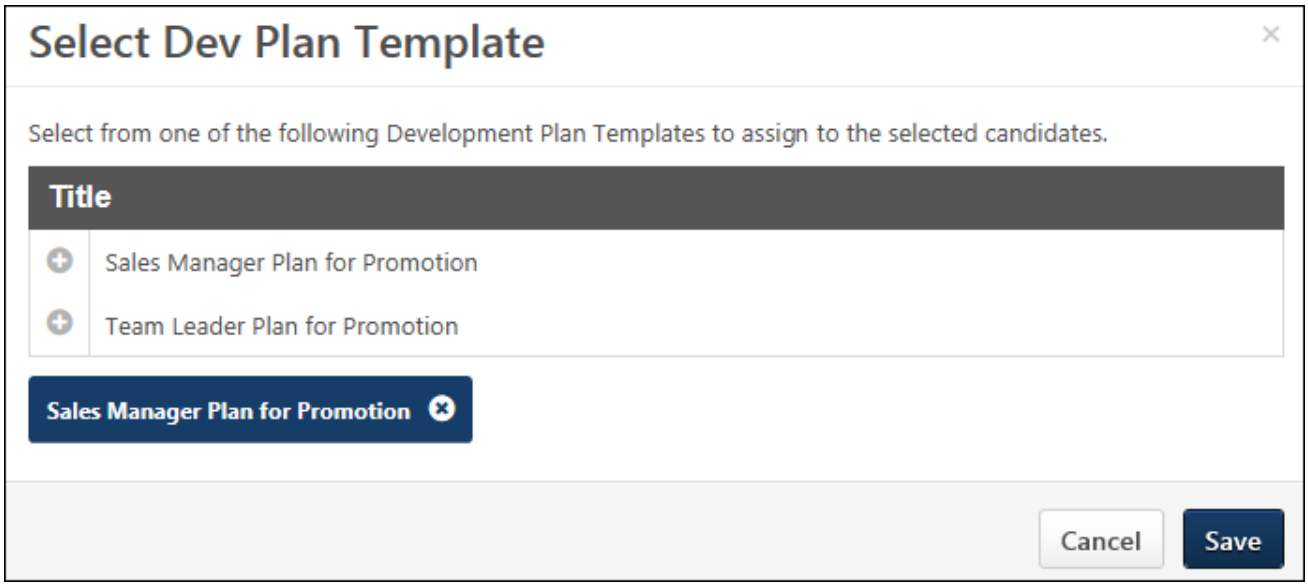
Once a nomination list is created, the list cannot be deleted.

Assign Dev Plan

The **Assign Dev Plan** option allows you to assign a development plan to candidates in the talent pool to help candidates move to next level positions in the organization. This option is only available for portals that also have Succession.

To assign a development plan:

1. Select one or more candidates.
2. Click the **Assign Dev Plan** option from the **ACTIONS** drop-down. This opens the Select Dev Plan Template pop-up.
3. Click the plus icon to the left of the development plan to select the plan. Only one plan can be selected.
4. Click **SAVE**. This adds the development for the candidates. The candidates' status in the talent pool changes to In Development.



Create Group/Add to Group

You can add candidates to a Group organizational unit (OU) so that other actions within the system can be applied to the OU.

Create Group

The **Create Group** option displays if at least one group has not yet been created in Manage Talent Pools. Only one Group OU can be created at the talent pool level, and only one Group OU can be created per nomination list. For example, if a talent pool has two

nomination lists, then up to three groups can be created. One group can be created for the talent pool and one can be created for each nomination list.

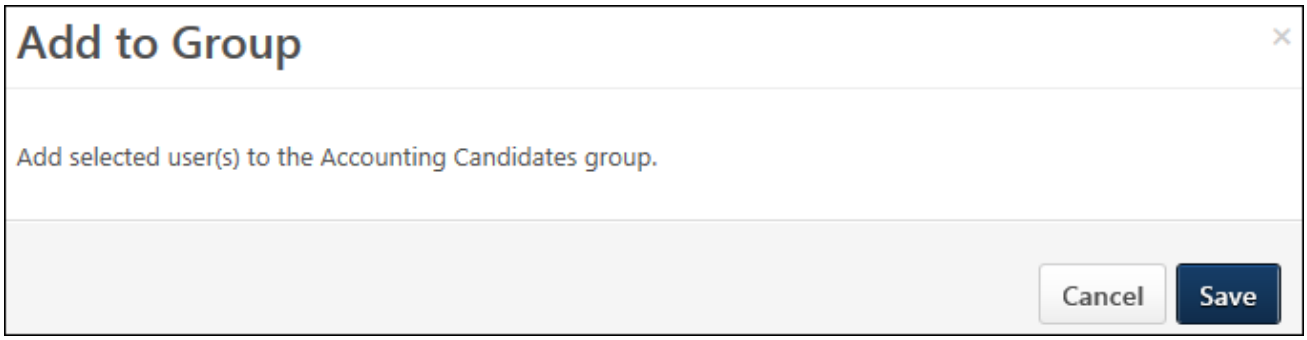
To create a group and add candidates to the group:

1. Select one or more candidates.
2. Click **Create Group** in the **ACTIONS** drop-down above the candidates table or the actions drop-down to the right of the candidate in the candidates table. This opens the Add to Group pop-up.
3. Enter the group name in the Group Name field, up to 50 characters.
4. Click **SAVE**. This creates the group and adds the selected candidates to the group.

Add to Group

The **Add to Group** option displays if at least one group has been created in Manage Talent Pools. To add candidates to an existing group:

1. Select one or more candidates.
2. Click **Add to Group** in the **ACTIONS** drop-down above the candidates table or the actions drop-down to the right of the candidate in the candidates table. This opens the Add to Group pop-up. When at least one group already exists for the talent pool, you cannot create another group. The pop-up displays the name of the group to which you can add the candidates.
3. Click **SAVE** to add the candidates to the group.



Note: *The* **Add to Group** *option is hidden if a Group OU that was previously created for the talent pool or nomination list is inactive.*

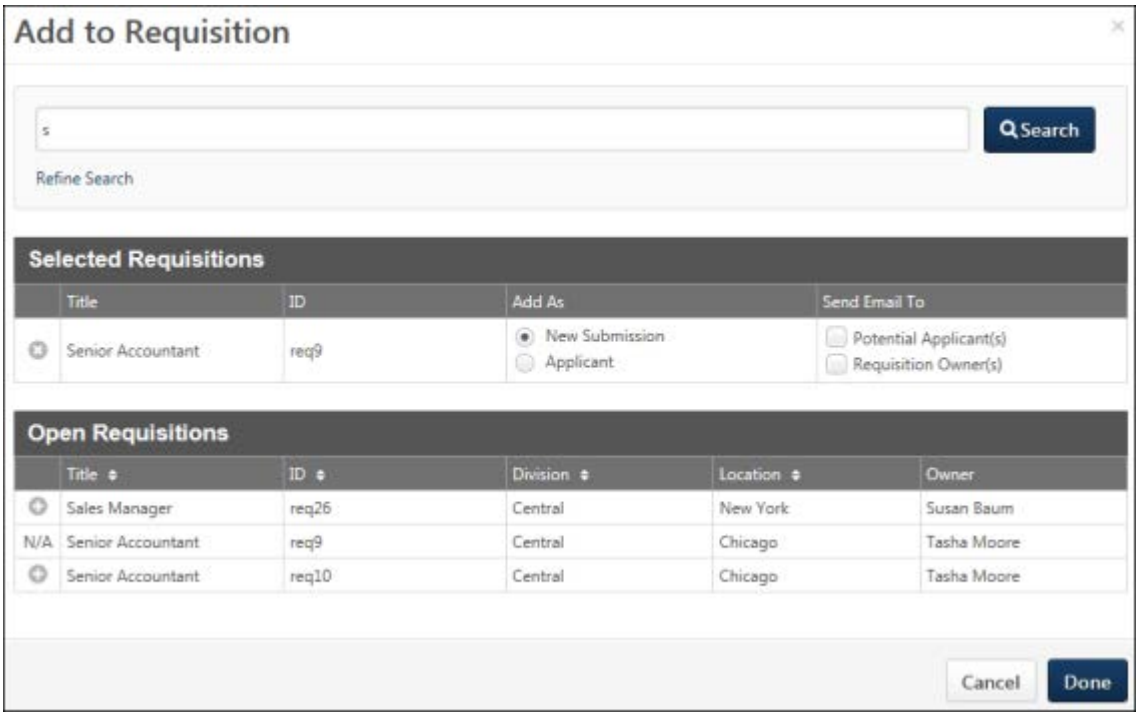
Add to Requisition

The **Add to Requisition** option allows you to add candidates to a job requisition. This option is only available for portals that also have Recruiting.

To add candidates to a requisition:

1. Select one or more candidates.
2. Click **Add to Requisition** from the **ACTIONS** drop-down. This opens the Add to Requisition pop-up.
3. Search for and select the job requisition to which to add the candidates.

4. Once the job requisition is selected, configure the following options for adding the candidates:
   A. **Add As** - In the Add As column, select the **New Submission** option to add the submission directly to the New Submissions page for the requisition. Select the **Applicant** option to add the submission directly to the Manage Applicants page for the requisition. If the **Applicant** option is selected, the applicant's status will be the first status in the status workflow for the requisition, and the date in the Current Status column is the date on which the applicant was manually added to the requisition. ***Note:*** *If the* **Skip New Submission Status** *option is enabled by the administrator in Requisition and Applicant Preferences, then the option to add an applicant as a new submission does not display for the Add to Requisition and Move to Requisition action items. The* **New Submission** *option in the Add to Requisition pop-up is hidden. The* **Applicant** *option is then selected by default.*
   B. **Send Email To** - In the Send Email To column, check the box to send an email to the requisition owner and/or the potential applicant, notifying them that the applicant has been added to the requisition. Both boxes are unchecked by default. ***Note:*** *If the new requisition requires applicants to complete certain steps prior to submitting their application, the email can be configured in Email Management to include a link for the applicant to apply directly to the requisition. Further, the application materials for the new job are pre-populated with the applicant's existing information.*



Delete

The **Delete** action allows the talent pool creator or a candidate with whom the talent pool was shared to remove a candidate from the talent pool. To delete a candidate:

1. Click **Delete** from the **Actions** drop-down. This opens the Remove User/Candidate pop-up.
2. Click **YES** to remove the candidate. This removes the candidate from the talent pool.
3. Click **NO** to close the pop-up without deleting the candidate.

Candidates Table

The candidates table lists all users who are in the talent pool. You can perform actions on an individual user and also change the user's status in the talent pool. You can also access the user's Universal Profile > Bio page.

Select All Checkbox

Select the checkbox in the header row to perform bulk actions from the **Actions** drop-down on all of the selected candidates.

Select Individual User

Select the checkbox to the left of each candidate's name to perform actions from the **Actions** drop-down

Table

The following information displays in the table:

- **Photo** - The candidate's photo displays, if available.
- **Name** - This column displays the candidate's name as a link. For internal user, clicking the name opens their Universal Profile > Bio page or My Team page. For portals with Recruiting, clicking the name of an external candidate opens their Applicant Profile page.
- **User ID** - This column displays the candidate's user ID.
- **Position** - This column displays the candidate's current Position organizational unit (OU). If there is no value available, then "N/A" displays.
- **Division** - For internal candidates, this column displays their current Division OU. For external candidates, this column displays "External."
- **Manager** - This column displays the name of the candidate's manager. If there is no value available, then "N/A" displays.
- **Added** - This column displays the candidate's date on which the candidate was added to the talent pool.
- **[Metric Filter]** - The name of this column is the name of the metric selected in the metric filter. The column displays the rating for the metric. If a candidate has no rating for the metric, then the column displays "N/A."
- **Status** - This column displays the candidate's status in the talent pool. You can manually change the status by selecting a status from the drop-down, which helps you to better manage the candidate's lifecycle in the talent pool. The following statuses display:
    - **New Candidate** - This status is assigned automatically when a candidate is added to the talent pool. indicates that the candidate has been added to the talent pool.

  - **In Development** - This status is assigned automatically when a development plan is added for the candidate.
  - **Nominated** - This status is assigned automatically when a candidate is added to a nomination list.
  - **Placed** - This status is assigned manually and indicates that a candidate has been promoted or placed in a position.

  Note: *Changing a candidate's status when viewing the candidate in a nomination list does not change their status in the main talent pool.*

- **Comments** - The Comments option allows you to add a comment about the candidate, as well as view the comments that others have added. Click the icon to open the Comments pop-up. Enter a comment in the text box. Only one comment can be added per user, up to 3000 characters. If comments have been added by other users, then the comments display below the text box. Any comments you enter can be viewed by the users with whom the talent pool is shared. You can edit your own comment by opening the Comments pop-up and changing the comment in the text box. To delete your comment, you can remove all text in the text box and click **SAVE**.
- **Actions** - This column displays the actions that can be performed for the individual candidate. To perform an action, it is not necessary to check the box in the far left column of the table. The following actions are available from the drop-down:
  - **Nominate** - *See the* **Nominate** *section above for more information.* ***Note:*** *This option is not available when the table is filtered by a nomination list.*
  - **Assign Dev Plan** - *See the* **Assign Dev Plan** *section above for more information.*
  - **Create Group/Add to Group** - *See the* **Create Group/Add to Group** *section above for more information.*
  - **Add to Requisition** - *See the* **Add to Requisition** *section above for more information.* ***Note:*** *This option is not available when the table is filtered by a nomination list.*
  - **Remove** - *See the* **Delete** *section above for more information.*

Modification History

The Modification History section displays the changes made to the talent pool or the nomination list. The section is collapsed by default.

The changes that display are based on the user's availability. If a user is not able to view a specific candidate due to permission constraints, then the change associated with the candidate does not display in the modification history.

The following changes display in the Modification History section:

- Talent Pool Created
- Nomination List Created
- Candidate Added to Talent Pool
- Candidate Added to Nomination List
- Candidate Removed from Talent Pool
- Candidate Removed from Nomination List

Modification History

Action	User	Changed By	Date	Time
Candidate Added	Jenn Chung	Tasha Moore	4/4/2016	02:38:00 PM
Candidate Added	Maggie Waters	Tasha Moore	4/4/2016	02:38:00 PM
Candidate Added	Mark Winter	Tasha Moore	4/4/2016	02:38:00 PM
Candidate Added	Olivia Turner	Tasha Moore	4/4/2016	02:38:00 PM
Candidate Added	Sue Lin	Tasha Moore	4/4/2016	08:44:00 AM
Candidate Added	Sophia Lucas	Tasha Moore	4/4/2016	08:44:00 AM
Candidate Added	Susan Reeves	Tasha Moore	4/4/2016	08:44:00 AM
Nomination List Created		Tasha Moore	4/1/2016	06:01:52 PM
Candidate Added	Josh Mesaros	Tasha Moore	4/1/2016	02:59:00 PM
Candidate Added	Valentina Davis	Tasha Moore	4/1/2016	02:59:00 PM
Candidate Added	Janette Andrews	Tasha Moore	3/31/2016	05:54:00 PM
Candidate Added	Ben Cho	Tasha Moore	3/31/2016	05:50:00 PM
Talent Pool Created		Tasha Moore	3/31/2016	11:46:04 AM

Manage Applicants

With this enhancement, an **Add to Talent Pool** option is added to the **Actions** drop-down. This option allows you to add applicants to an existing talent pool or create a talent pool to which to add the applicants.

Note: *For portals that have Recruiting but that do not have Succession, you can add applicants to a talent pool but cannot manage talent pools.*

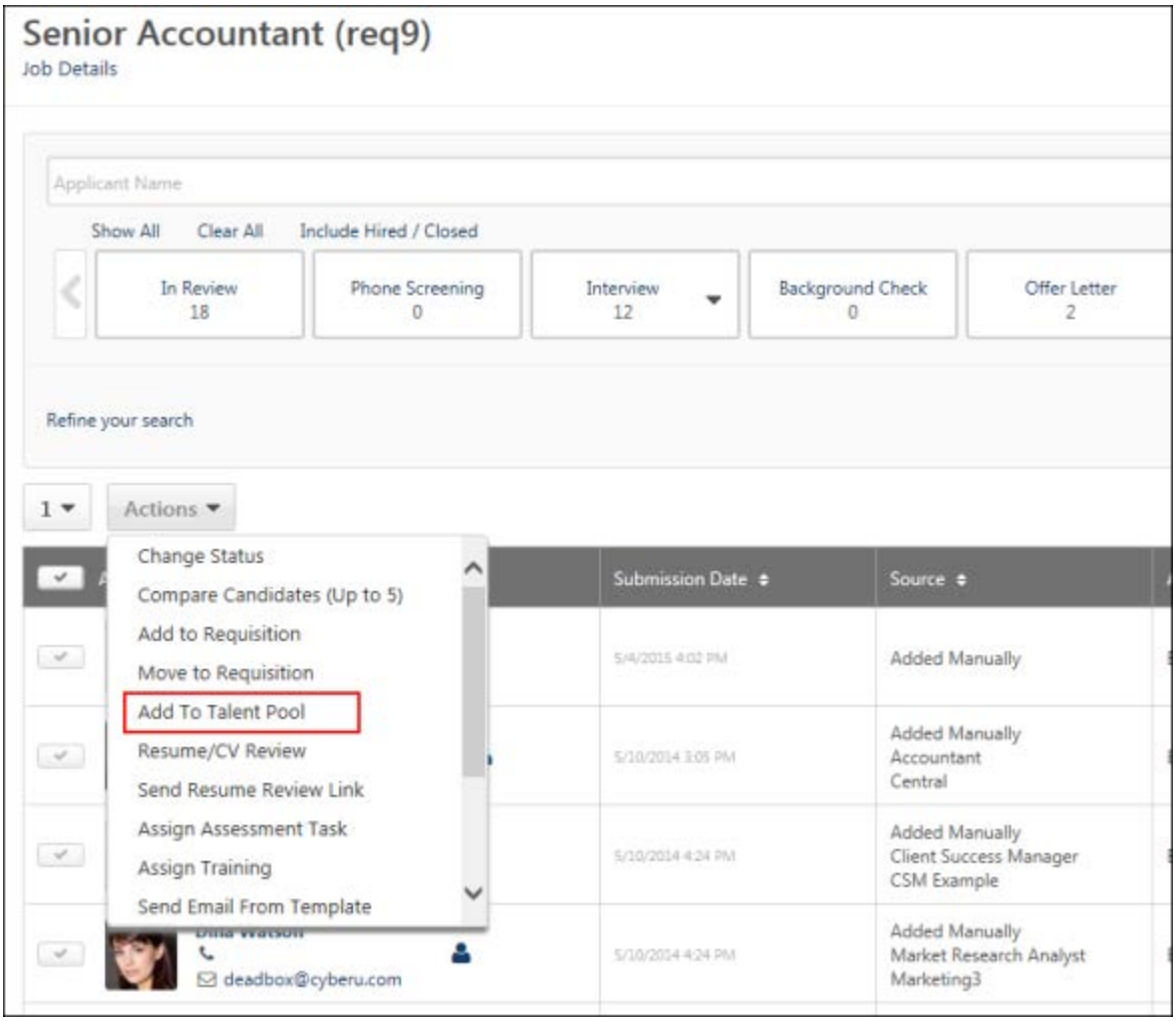
To access the Manage Applicants page, go to **Recruit > Manage Requisition**. On the Manage Job Requisitions page, locate the requisition for which you would like to manage applicants. From there, click the linked number of applicants in the Applicants column.

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 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

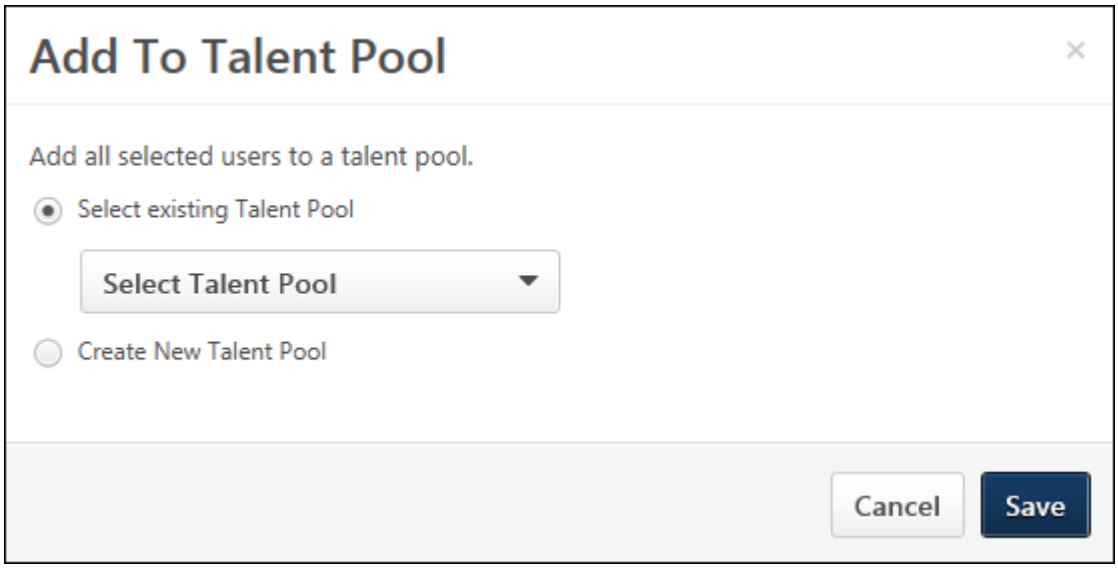
Talent Pools - Manage	Grants ability to create and manage Talent Pools. This permission also grants access the ability to add candidates to a job requisition. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration



Add to Talent Pool

To add applicants to a talent pool:

1. Click **Add to Talent Pool** from the **ACTIONS** drop-down. This opens the Add to Talent Pool pop-up.



2. Select an existing talent pool from the **SELECT TALENT POOL** drop-down.
3. Or, create a new talent pool by clicking the **Create New Talent Pool** option and entering the name of the talent pool, up to 50 characters.
4. Click **SAVE**. This opens the Applicant Action Results pop-up to indicate whether or not the action was successful. If the action is successful, then the applicants are added to the talent pool. If the action is unsuccessful, then the reason is displayed in the Details column in the pop-up.

Applicant Profile - History

When an applicant is included in the **Add to Requisition** action type from the Manage Talent Pools page, the event is logged on the History tab of the applicant's profile.

- Event Title - This column displays the name of the event as "Added from Talent Pool."
- Details - This column displays "Source: Talent Pool."
- 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.

Additional Recruiting Fields

With this enhancement, fields are added to the Requisition and User sections for Recruiting Custom Reports.

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

Requisition

Succession

Talent Pools - Succession

The detailed information for the **Talent Pools redesign** can be found in the What's New for April 2016 > Recruiting section of Online Help.

When viewing the release notes, the Talent Pools redesign enhancement can be found in the Recruiting section.

Custom Reports - Update to Task Status for Launched Tasks

Support Unlaunched Tasks

With this enhancement, statuses for Succession Management Plan (SMP) tasks that have been started will now accurately reflect in reporting. Prior to this enhancement, statuses for started tasks were not always reflected accurately, in the custom reports.

This enhancement addresses this design flaw to ensure that any started tasks displayed in the Succession custom report display the correct statuses.

Task Status Field

With this enhancement, the **Task Status** field will display the correct status value in the report output for Succession Custom Reports. Prior to this enhancement, the status field displayed inconsistent information.

Security

The following existing permissions apply to this functionality:

Custom Onboarding Report - Create	Grants ability to create and edit custom Onboarding reports. This permission refers to creating custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics
Custom Onboarding Report - View	Grants ability to view results of custom Onboarding reports created by self or shared by others. This permission refers to viewing custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
LO Possible Credit	Number of credits set for a training for an individual user, regardless of the status of the training. This reports on the individual credit values that have been assigned to different courses within certifications. These training	Numeric

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
	courses can appear in multiple sections, irrespective of their status.	

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Availability Type	Drop-down selection set for OUs (organizational unit), groups and users.	Text
Electronic Signature Message	Message configured with the electronic signature at the Course Catalog.	Text
Electronic Signature Required	Indicates if an electronic signature is required for a learning object (LO).	Yes/No
Session Roster Comments	The comments entered on the roster for a session.	Text
Training Availability	Displays the OUs and users selected in the Availability Selection Criteria for learning objects. Each OU and user displays in a separate row. Individual users only display if individually selected in the availability criteria.	Text
Training Availability Include Subordinates	The boolean field selected for OUs, groups, and users.	Text
Training Availability Pre-Approved	The boolean field selected for OUs, groups, and users.	Text
Training Availability Register Upon Approval	The boolean field selected for OUs, groups, and users.	Text
Training Deactivation Date	Displays the LO deactivation date.	Date
Training Purpose	The purpose of the training entered in the Course Catalog.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Training Request Form	Drop-down selection set for OUs, groups, and users.	Text
Training Version Comments	The comments entered at the time a training is versioned. This field is only available for Material, Test, Curriculum, and Online Course LO types.	Text
Training Version Effective Date	The date a version is effective.	Date
Training Version End Date	The date the version is set to end.	Date
Training Version Start Date	The date the version of an LO begins.	Date

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Secondary First Name	The first name specified for a secondary address.	Text
Secondary Last Name	The last name specified for a secondary address.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Ability to Select Session Admins and Managers	Indicates whether the **Select Session** link for an event is displayed on the user's Universal Profile > Transcript or Training Details page.	Yes/No
Ability to Select Sessions End Users	The User Session Selection Allowed field is renamed Ability to Select Sessions End Users. This field indicates whether the **Select Session** link for an Event is displayed on the user's Universal Profile > Transcript or Training Details page.	Yes/No
Curriculum Completion	This is an existing field that is now available in the Learning > Transcript section of the Multi-Module	Numeric

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Percentage	Custom Report. There is no change to the data that is displayed in this field.	
Latest Version	Indicates that a curriculum is the latest version.	Text
User Course Review Desc	Displays the user's course review.	Text
User Course Review Title	The User's Course Review field is renamed User Course Review Title. There is no change to the data that is displayed in this field.	Text
User Part Attendance	Displays the number of parts a user attended for a specific session.	Numeric

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback - View and Post	Enables user to view the Feedback page of the universal profile and to post feedback. Users can view and post feedback on the Feedback page for all users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Self, and Employee Relationship. This is an end user permission.	Universal Profile
Snapshot - Competencies	Enables user to view the Competencies widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Snapshot - Development Plans	Enables user to view the Development Plans widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates,	Universal Profile

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

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Employee Goals - Align	When creating a goal for users other than self or subordinates, this permission allows administrators to align the goal with other goals. The constraints on this permission determine with which employees the administrator can align the goal. This permission works in conjunction with the Create Employee Goals permission. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Performance - Administration
Goal Preferences - Manage	Grants ability to manage Goal Preferences, where various goal features can be enabled or disabled according to the needs of the organization. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This	Performance

	is an end user permission.	

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - EPM	Grants ability to view and take action upon Performance (EPM) items on the Action Items page and in the Your Action Items widget. This permission can be constrained by OU, User's OU, User's Self, and User's Self and Subordinates. This is an end user permission.	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
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
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot - Badges	Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User,	Universal Profile

	User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	
Snapshot - Leaderboard	Enables user to view the Leaderboard widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Leaderboard widget when the widget is enabled. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Badge & Point Preferences - Manage	Enables user to access and edit preferences on the Badge & Point 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.	Core Administration.

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
Snapshot Main - View	Enables user to view the Snapshot page for users	Universal

	within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.*	Profile
Snapshot Preferences - Manage	Enables administrator to access and edit the Snapshot Preferences page. This permission can be constrained by Employee Relationship, OU, and User's OU. This is an administrator permission.	Universal Profile

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback - Request	Enables user to request feedback from the Feedback page of their Universal Profile. Users can only request feedback from other users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Form Sections - Manage	Grants ability to create and manage performance review questions and sections which are used in performance review tasks. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
[Name of Category] (Category)	This field displays the name of the competency category and the value selected for the competency. o Example of how the selected category appears: Corporate (Category) o Example of how the selected competency appears: Corporate Values	Text
Competency Description	The description of the competency.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Marked As Final	Indicates whether or not a goal is marked as final.	Yes/No
Marked As Final - Date	The date/time the goal was marked as final.	Date
Success Descriptors Title	The title of the success descriptor for a goal. Each success descriptor appears in a separate row.	Text
Success Descriptors Description	The description of the success descriptor for a goal. Each description appears in a separate row.	Text

FIELD NAME	DESCRIPTION
Sign-off Comments	This displays any comments that were added by the reviewer on the Sign-off step of the performance review.
Sign-off Declined to Sign	This displays whether the reviewer declined to add their signature to the Sign-off step of the performance review.
Sign-off Signature	This displays the signature text that was submitted on the Sign-off step of the performance review.
Sign-off Timestamp	This displays the date and time at which the reviewer added their signature to the Sign-off step of the performance review.
Sign-off Type	This displays the sign-off type that is associated with the Sign-off Section. This is configured when the review section is created. The available options are Electronic, Authenticated, or Manual.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Performance Reports - Create	Grants ability to create and edit Custom Performance reports. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Subordinates.	Reports - Analytics
Custom Performance Reports - View	Grants ability to view results of Custom Performance reports created by self or shared by others.	Reports - Analytics

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
External Search: Manage	Grants access to view and manage the external sourcing functionality. This permission cannot be constrained.	Recruiting

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
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 -	Recruiting Administration

	Search Results page. This permission can be constrained by OU and User's OU.	
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*	Recruiting

	*associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the **Requisition: Reviewer** permission. See **Applicant Profile Page Overview** for more information about duplicate reviewer instances.*	

Requisition 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

STEP	GO TO	STEP DESCRIPTION
1	Manage Job Requisitions > Create Job Requisition	Enter keywords in the **Keywords** field. The keywords are **USED** to automatically populate the search criteria in Broadbean.
2	Recruit > Manage Job Requisitions or Recruit > Candidate Search Query	Click the **External Sources** option in the options drop-down. This opens the Broadbean search page.
3	Broadbean Search Page	Select the job boards from which to search for applicants. The keywords and job title from the job requisition will be pre-populated so that you do not need to enter search criteria.
4	Broadbean Search Page	Search for applicants from the Broadbean search page.
5	Broadbean	Click the **Add to Talent Pool** option to add the desired

STEP	GO TO	STEP DESCRIPTION
	Search Results Page	applicants to the talent pool. The talent pools that display in Broadbean for recruiters are the talent pools to which they have access to view and edit in the portal. ***Note:*** *If an applicant currently has an Applicant Profile page in the portal, then the applicant is automatically added to the talent pool.* ***Note:*** *External applicants can still create a profile on the career site if the talent pool to which they are added is deleted before the applicant creates their profile.*

ACTION	DESCRIPTION / TRIGGER
Create Profile Invitation	This email is triggered when an external applicant is added to a talent pool via Broadbean. The email should include the INVITATION.TO.CREATE.PROFILE tag so that applicants can click the link to create a profile. The email should also include the DELETE. CANDIDATE.INFORMATION tag so that applicants can delete their temporarily stored data from the database. The email can be sent to external candidates that were added to the talent pool and have created a profile with a valid email address. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Administration. Use Case: This trigger invites an external applicant to create a profile on the career site. The email is triggered when the applicant is added to a talent pool via Broadbean. ***Note:*** *This email is not sent to applicants who currently have a user record in the portal. However, the email* ***is*** *sent to applicants who are added to a talent pool for a different requisition but have already created a profile on the career site. In such cases the applicant will be directed to a page that indicates an account (which is created using the applicant's email address) currently exists for the applicant.*

TAG NAME	DESCRIPTION
ACTION.DATE	Date that the action took place that triggers the email.

TAG NAME	DESCRIPTION
INVITATION.TO.CREATE.PROFILE	Link to the default career site.
DELETE.CANDIDATE.INFORMATION	Link to delete temporary profile data. Applicant can click the link and choose to remove their temporary profile data from the organization. When the user clicks **YES** to delete, a confirmation appears. Click **YES** to confirm the deletion, or click **NO** to cancel the deletion. If you click **YES**, the candidate is directed to the job search page of the career site.
COMPANY.NAME	Name of the company that sent the email. (This is your company's name.)
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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	Recruiting

	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.*	

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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*	Recruiting

	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.*	

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Onboarding - Manage	Grants ability to manage user onboarding in the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
Onboarding - View	Grants ability to view the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
Snapshot Documents - View	Grants ability to view the Documents widget and subpage within the Universal Profile - Snapshot page. This permission can be constrained by Employee Relationship, OU, User's OU, User's Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. This is an end user permission.	Universal Profile

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Onboarding Report - Create	Grants ability to create and edit custom Onboarding reports. This permission refers to creating custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics
Custom Onboarding Report - View	Grants ability to view results of custom Onboarding reports created by self or shared by others. This	Reports - Analytics

	permission refers to viewing custom reports for the Onboarding module. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	

CURRENT REPORT NAME	NEW REPORT NAME
Form Management Report	Training Form Management Report

CURRENT SECTION NAME	NEW SECTION NAME
Form Template	Training Form Template
Form Task	Training Form Task

REPORT SECTION	CURRENT FIELD NAME	NEW FIELD NAME
Training Form Template	Form Template Name	Training Form Template Name
Training Form Task	Task Name	Training Form Task Name
	Form Task Status	Training Form Task Status

CURRENT PERMISSION NAME	CURRENT DESCRIPTION	NEW PERMISSION NAME	NEW DESCRIPTION
Custom Form Management Reports - Create	Grants ability to create and edit custom Form Management reports.	Custom Training Form Management Reports - Create	Grants ability to create and edit custom Training Form Management reports.
Custom Form Management Reports - View	Grants ability to create and edit custom Form Management reports.	Custom Training Form Management Reports - View	Grants ability to view custom Training Form Management reports.

CURRENT REPORT NAME	NEW REPORT NAME
On Boarding Report	Training Forms - Curricula Report

REPORT SECTION	CURRENT FIELD NAME	NEW FIELD NAME

REPORT SECTION	CURRENT FIELD NAME	NEW FIELD NAME
Training Form Template	Form Template Name	Training Form Template Name

CURRENT PERMISSION NAME	CURRENT DESCRIPTION	NEW PERMISSION NAME	NEW DESCRIPTION
Custom On Boarding Report - Create	Grants ability to create and edit custom On Boarding reports.	Custom Training Forms - Curricula Report - Create	Grants ability to create and edit custom Training Forms - Curricula reports.
Custom On Boarding Report - View	Grants ability to view custom On Boarding reports.	Custom Training Forms - Curricula Report - View	Grants ability to view custom Training Forms - Curricula reports.

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
Pre-Screening Question Bank - Manage	Grants ability to access and manage Pre-Screening Question Bank.	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	Recruiting

	for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: 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

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Application Custom Fields - Manage	Grants ability to create and edit custom fields used for Applicant and Application. This permission also grants access to the Applicant Custom Fields and Application Custom Fields sections of the Requisition and Applicant Preferences page. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Organizational Unit Custom Fields - Manage	Grant Access to create and edit custom fields for Org Units. This is an administrator permission.	Core Administration
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units and custom groups. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core 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*	Recruiting

	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 Preferences - Manage	Grants ability to access and manage Requisition Preferences. This permission cannot be constrained.	Recruiting Administration
Requisition Request: Select Users	Grants ability to select requisition owners, reviewers, and interviewers when creating requisition requests. This permission can be constrained by OU and User's OU. The constraints define which users are available when selecting users for requisition requests.	Recruiting
Requisition Request: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	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

Self-Registration and User Record Custom Fields - Manage	Grants access to manage custom fields for user Self Registration and the user record in Custom Field Administration. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Requisition: Edit Postings	Grants ability to edit the Internal Postings and External Postings tabs when creating, copying, or editing a job requisition. In addition, this permission enables users to store user-level credentialing information for job board aggregation partners on the My Gateways tab of the My Account page. This permission cannot be constrained.	Recruiting
Requisition: 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*	Recruiting

	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.*	

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

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
Applicants: Add to Talent Pool	Grants ability to add applicants to talent pools.	Recruiting
Talent Pools - Manage	Grants ability to create and manage Talent Pools. This permission also grants access the ability to add candidates to a job requisition. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Requisition Cost	The Cost Center entered for the	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Center	requisition.	
Requisition Keywords	The keywords entered for the requisition.	Text

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Succession Report - Create	Grants ability to create and edit Custom Succession Management (SMP) and Custom Job Pool Succession Reports reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics
Custom Succession Report - View	Grants ability to view results of Custom Succession Management (SMP) and Custom Job Pool Succession Reports reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Subordinates.	Reports - Analytics