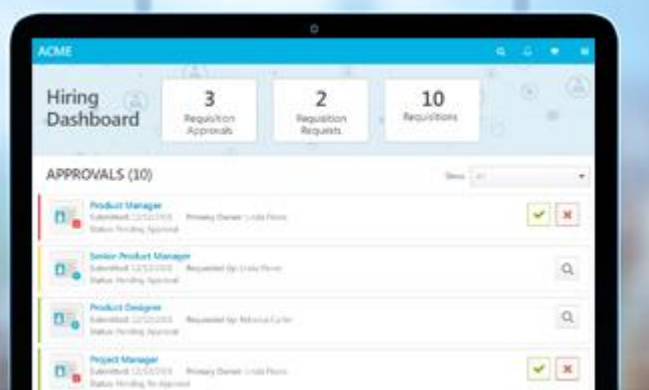


JULY 2016 PRODUCT RELEASE
Driving Faster Decisions



Cornerstone July 2016 Release Notes

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What's New for July 2016

What's New for July '16

The following release resources are available within Online Help:

- Printable Release Notes - This topic provides a printable version of all release notes content. *See [Printable Release Notes for \[%=Primary.Current Release%\]](#).*
- New and Enhanced Permissions - This topic provides a list of all permissions that are newly added or modified with this release. *See [New and Enhanced Permissions for July '16 Release](#) on page 33 for additional information.*
- Release Notes Updates - This topic provides a complete list of all changes that have been made to the release notes. *See [Release Notes Updates](#) on page 39 for additional information.*
- Online Help Announcements - This topic provides important announcements regarding new content and features within Online Help. *See [Online Help Announcements](#) on page 38 for additional information.*

Safe Harbor Statement: Any unreleased services or features referenced in this or other documents or public statements are not currently GENERALLY available and may not be delivered on time or at all. Customers who purchase Cornerstone OnDemand applications should make their purchase decisions based upon features that are currently available.

The following new features and enhancements are available for the October 2016 release as of 7 July 2016:

Compensation Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Compensation Usability Enhancements	Compensation Usability Enhancements		With this enhancement, the Wage Types options appear in a drop-down menu when creating or editing an adjustment guideline. In addition, when viewing the Summary tab or Approval tab for a compensation plan, the Effective Date is now displayed for each component in the compensation plan. This indicates when the changes for each component will be effective if the compensation plan is

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			approved.
Universal Profile Request for Compensation Approvals	Universal Profile Request for Compensation Approvals		With this enhancement, a user can complete Compensation approvals from the Request tab within Universal Profile: Actions. This allows the managers to more efficiently provide approvals.

Connect Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Community Feed	Community Feed		With this enhancement, a Community Feed can now be included on the main page of a community. The Community Feed may display the latest activity for the specific community. In addition, community members may be able to create discussion postings directly from the Community Feed.
Configurable Action Groups	Configurable Action Groups		With this enhancement, administrators can customize the abilities of action groups within a community. This means that admins can add or remove abilities for action groups to best suit their purposes. This level of customization will help organizations maximize the functionality of Connect.
Full Text	Full Text Editor		With this enhancement, a full text

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Editor			editor is now available within Connect when creating a posting which provides much more formatting functionality to help eliminate the need for additional tools. When editing the body of a posting, users can align text, change text font, update text size, add color to text, insert line breaks, embed links, tables, and images in a post, and paste content from Microsoft Word.

Core Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Add User Type and Employment Status	Add User Type and Employment Status		With this enhancement, organizations now have the ability to capture, store, and report on user type, employment status, leave, and termination information.
Auditing and Effective Dating for User Type & Employment Statuses	Auditing and Effective Dating for User Type & Employment Statuses		With the introduction of the ability to capture, store, and report on user information (user types, statuses, leave reasons, and termination reasons), Link clients can now audit and effective date the following fields: <ul style="list-style-type: none"> ○ User Type ○ User Subtype ○ User Status ○ Leave Type ○ Termination Type

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<ul style="list-style-type: none"> ○ Eligible for Rehire ○ Termination Reason
Data Load Wizard - Link Historical Effective Dated User Data	Data Load Wizard - Link Historical Effective Dated User Data	See Notes	With this enhancement, organizations can load multiple effective dated records for each user in a single load. This streamlines the ability to migrate user data from a legacy system into Cornerstone.
Data Load Wizard - Support User Types and Employment Statuses	Data Load Wizard - Support User Types and Employment Statuses	See Notes	<p>The Data Load Wizard Platform User Load and Feed now support the following fields:</p> <ul style="list-style-type: none"> ○ User Type ○ User Subtype ○ User Status ○ On Leave Type ○ Termination Date ○ Termination Type ○ Eligible for Rehire ○ Termination Reason
End of IE8 Support in February 2017	End of IE8 Support in February 2017		In order to keep up with browser security requirements and the latest software enhancements, Cornerstone will discontinue support for Microsoft Internet Explorer 8 in February 2017. Please reach out to your IT department and make plans to convert to one of the compatible browsers prior to the February 2017 release.

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Insights			You can access Online Help for the Career Mobility Insight here . Online Help for the Learning Optimization, Learning Trends, and Predictive Potential Insights is forthcoming.
Manager Self Service Employee Relationships	Manager Self Service Employee Relationships		With this enhancement, employee relationship fields can now be added to forms, and users can modify the fields using forms. This enables managers and other users to update a user's employee relationship information without the intervention from administrators for events such as promotions or internal transfers. As a result, organizations can implement this functionality to reduce the impact on administrators and allow for more timely updates to user information.
Publish Custom Charts to Dashboards	Publish Custom Charts to Dashboards		With this enhancement, charts created in the Custom Report Builder can be published as custom dashboards and shared within your organization. You can leverage the powerful visualizations within the Custom Report Builder to build your own visuals and add them to dashboards.
Subplanning	Subplanning		With this enhancement, the

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			Subplanning functionality of Workflow Planning enables large-scale collaboration on headcount planning in an orderly and efficient way. Planning headcount for an organization requires input from many people in order to be accurate, but collaborating can be a logistical difficulty. In the Planning tool today, Human Resources leaders would have to create multiple smaller plans for each area of the organization, and then combine them at the very end in order to create a comprehensive, organization-wide plan.
View Data	View Data		View Data enables organizations to interact with their talent data. Beyond simple tables and static visualizations, View Data combines data from multiple product modules and uses advanced visualizations to deliver not only an overview of the data but also a means to filter it down to the individual. With the July '16 release, View Data encompasses data from Performance, Succession, and Compensation.
Web Service GlobalSearch (Update)	Web Service GlobalSearch (Update)	See Notes	With this enhancement, the following field is now included in the GlobalSearch

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>(REST) web service response:</p> <ul style="list-style-type: none"> ○ Training Purpose - This displays the training purposes that are available to users for the learning object (LO).
Reports - Add OU Custom Fields to Custom Reports	Custom Report - Organization Unit Custom Fields		<p>With this enhancement, an OU Custom Fields section is added to the following custom report types:</p> <ul style="list-style-type: none"> ○ User Custom Reports ○ Multi-Module Custom Reports
Reports - Reporting Enhancements	Reporting Enhancements		<p>With this enhancement, when a user copies a shared report, the User/OU filters, Share, and Schedule settings are no longer retained.</p>
Reports - User as of a Date Additional Fields	User as of a Date Additional Fields		<p>With this enhancement, newly added effective dated user fields can now be included in the User Record as of a Date standard report.</p>
Reports - User Types and Employment Statuses in Custom Reporting	Custom Report - User Types and Employment Statuses		<p>With this enhancement, user type and status information can now be reported on in User Custom Reports from a new User Status Information section. Custom reports that include these fields can be filtered based on user type and/or status. This information can be used to identify trends relating to</p>

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			different types of users and their status.
Reports - Link User Audit Report	Link User Audit Report		<p>With this enhancement, Cornerstone has redesigned how user audits are handled for Link clients to give better access to auditing data. Reporting on robust user record audits will now be available through a new Standard Report. This report will appropriately localize all fields included in the modification history, giving clients an improved ability to report on audit data.</p> <p>This feature will be released in the August 26 patch. This feature will not be available for testing during User Acceptance Testing (UAT).</p>

Edge Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Edge Manage Users Tab	Edge Manage Users Tab		With this enhancement, users can be managed from a separate tab in Edge Integrations, eliminating extraneous data and functionality from the administrator's experience when managing users.
Edge	Edge Integration		With this enhancement,

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Integration Purchasing Enhancements	Purchasing Enhancements		<p>several new features have been added to improve the usability of Edge Integration purchase administration. These features include:</p> <ul style="list-style-type: none"> ○ Auto-disablement of unpurchased Edge Integration trials ○ Automatic trial period expiration ○ Prevention of duplicate trial periods ○ Downloadable purchase histories ○ Records of Edge Integration purchases

Learning Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Course Recommendations: Preview Program			<p>With the July '16 release, 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</p>

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>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.</p> <p>The initial release of Course Recommendations is a limited Preview program. At a future date, this functionality will be available to all organizations.</p>
Custom Reports Additional Learning Fields	Custom Reports Additional Learning Fields		<p>With this enhancement, new LMS fields have been added to custom reports to support new functionality and increase the effectiveness of custom reporting functionality. New custom report fields have been added for the following system features:</p> <ul style="list-style-type: none"> ○ Curriculum Title ○ Curriculum Section ○ Session Withdrawal Date

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<ul style="list-style-type: none"> Course Code
Data Load Wizard System Generated Identifier for Learning Object Loads	Data Load Wizard System Generated Identifier for Learning Object Loads		With this enhancement, when loading events and sessions into the system using the Data Load Wizard, administrators can enable the system to generate a course code based on configured prefixes, suffixes, and separators in Course Code Preferences.
Instructor-Led Training Reservations and Restrictions Enhancements	Instructor-Led Training Reservations and Restrictions Enhancements		With this enhancement, the system reprocesses users who have already registered for a session if an administrator makes changes to the session's ILT enrollment and restrictions criteria. This ensures that the number of reserved seats available is accurately recalculated and displayed, increasing the stability of this functionality.
Mark Complete After Launch	Mark Complete After Launch		With this enhancement, the option to mark a

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			material complete is not available to the learner until they have launched the material. Materials can also now move to an In Progress status after they have been launched, to help users ascertain their current progress on a material LO.
Offline Network Player Login Customization	Offline Network Player Login Customization	See Notes	With this enhancement, the administrator can predefine the portal name for users upon login. Once configured, users can log in to the Offline Network Player without having to enter the portal name as it will automatically appear on the login screen. This simplifies the login process.
Skillsoft Pre-test Functionality Removal	Skillsoft Pre-test Functionality Removal		Currently, Skillsoft content purchased through Cornerstone's Content Services team is designed to include a Pre-Test which allows users to "test out" of a course if the minimum score

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			is achieved without actually navigating through the course itself. Due to resounding feedback from our clients, we have opted to disable this feature for all clients who have purchased Skillsoft content through Cornerstone. Once this update is made, users will no longer have the ability to test out or skip through the course by completing the Pre-Test at the beginning of the course. This reinforces a learning culture and encourages learners to complete assigned trainings in its entirety, particularly those mandated by regulatory/compliance law.
System-Generated Course Code for Learning Objects	System-Generated Course Code for Learning Objects		With this enhancement, a unique course code is automatically generated for several types of LOs when they are created by an administrator. Similar to the

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>Learning Object ID, the course code is automatically generated, unique, and non editable, but system administrators can control the format used by the system to generate course codes. Administrators can define the course code format via Learning Preferences.</p>
Partial Scoring for Multiple Choice/Multiple Answer Questions	Partial Scoring for Multiple Choice/Multiple Answer Questions		<p>With this enhancement, users can now receive partial credit for selecting some of the correct answers in a multiple choice/multiple answer question.</p>
Training Completion Page Enhancements	Training Completion Page Enhancements		<p>With this enhancement, an additional feature has been added to the Training Completion page to further promote engagement with training. After completing training that has an associated Training Completion page, users can now</p>

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			receive quick access to optional Level 1 and Level 2 evaluations attached to the training. Once all evaluations associated with the training have been completed, the Training Completion page also provides users with confirmation of the completion.
Webex T31 Support	WebEx T31 Support		With this enhancement, organizations can now upgrade to the latest version of WebEx Training Center (version WBS31) without impacting the effectiveness of vILT functionality. The system is now compatible with the latest version of WebEx Training Center.
Web Service GetCertificationDetails (Update)	Web Service GetCertificationDetails (Update)	See Notes	With this enhancement, the following fields are now included in the GetCertificationDetails (SOAP) web service response: <ul style="list-style-type: none"> Family - This

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>displays the family associated with the certification.</p> <ul style="list-style-type: none"> ○ Category - This displays the category associated with the certification.
Web Service Remove Certification (New)	Web Service Remove Certification (New)	See Notes	<p>With this enhancement, a new Remove Certification REST web service is now available. This web service can be used to remove certifications that are assigned to users.</p>
xAPI Tin Can on Transcript	xAPI (Tin Can) on Transcript		<p>With this enhancement, users will now be notified of new completed xAPI Learning Records by a notification at the top of the Transcript page in the Learning module. Learning Records recorded in xAPI will also display on the Completed page of the Transcript along with any learning objects (LOs) completed within the Learning module. This allows users and managers</p>

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			to view records of all learning in one place.

Mobile Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Mobile App Enhancements	Mobile App Enhancements		With this enhancement, the mobile application user interface is improved to achieve consistency across pages.
Mobile Dashboard	Mobile Dashboard		With this enhancement, a new Dashboard is available within the mobile application. This new and optimized mobile landing page provides users with a faster and more intuitive navigation experience. Users now have a clear vision of how many actions they must take and how many courses they have that are due soon. Users can also navigate the app more effectively.
Mobile Login with PIN	Mobile Login with PIN		With this enhancement, when a user logs in to the mobile application via SSO or company credentials for the first time, they are now prompted to create a numeric PIN that will be used to log in to the app in the future. This enhancement is intended to facilitate easy login and to increase user engagement. In

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			addition, helpful tooltips are now available throughout the login process to help users log in to the mobile application.

Performance Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Feedback Preferences Page	Feedback Preferences Page		The Feedback Preferences page allows administrators to customize rating scales used in feedback requests by division. The administrator can enable users to request feedback on goals, ask a question with a rating response, ask a question with a yes/no response, and add attachments. The rating scale can be customized from 1-15, and the ratings display can be configured to display ratings as numeric, text, or both.
Goals Enhancements	Goals Enhancements		<p>With this enhancement, the following enhancements have been made to the Goals functionality:</p> <ul style="list-style-type: none"> My Goals - The My Goals page now displays the user's overall progress towards their goals and the total weight of all of their goals. This enables users to quickly see the

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>overall status of their goals.</p> <ul style="list-style-type: none"> ○ Snapshot - Goal Progress - Goals in Draft status are no longer included in goal progress within Snapshot. ○ Goal Alignment - Users must have the Create Employee Goals - Align permission in order to search for goals by user when aligning their goal with another user's goal. ○ View Goal History - The History pop-up for a goal now includes additional details, including overall goal, task, and target progress, task field details, and target field details. ○ My Team - Manage Goal - When a manager selects a goal title from the My Team > Performance > Goals page, the manager is directed to a Manage Goals page that exists independent of Snapshot. This enables managers to manage their employees' goals from My Team if Snapshot is not enabled.
Iterative Goal Planning	Iterative Goal Planning		With this enhancement, organizations can now employ a more continuous goal management process within a performance review task

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>between employees and their reviewers.</p> <ul style="list-style-type: none"> ○ A new Performance Review Step Reopened email trigger can be leveraged to alert a reviewer when a performance review task step is re-opened. ○ Reviewers can view the history of a goal within a Goal Planning section of a performance review task. ○ Prior to this enhancement, commenting functionality was not available for Goal Planning performance review sections. With this enhancement, commenting can be enabled for Goal Planning performance review sections. This is done by enabling the Comment right for the section. Note: <i>Goal Planning performance review sections are only available for non-peer reviewers and non-360 degree reviewers.</i> ○ Prior to this enhancement, administrators could not configure a Goal Planning performance review section to be view-only. With this enhancement, administrators can configure a Goal Planning performance review

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>section to be view only. This is done by enabling the View Only right for the section. Note: <i>Goal Planning performance review sections are only available for non-peer reviewers and non-360 degree reviewers.</i></p> <ul style="list-style-type: none"> ○ When a performance review step is reopened, Goal Planning sections reflect the latest goal planning information, including any goals that have been added or modified in later steps within the performance review task.
Structured Feedback: Goals	Structured Feedback: Goals		With this enhancement, employees can request structured feedback by adding a goal to their feedback request and asking one question, which can prompt a yes/no or rating response.
Web Service Create Goal (New)	Web Service Create Goals Service (New)	See Notes	With this enhancement, a new Create Goal REST web service is now available. This web service can be used to create user goals.
Web Service EPM REST (Update)	Web Service EPM REST (Update)	See Notes	<p>With this enhancement, the following fields are now included in the EPM (REST) web service response:</p> <ul style="list-style-type: none"> ○ Competency Description -

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			This displays the description of the competency.
Web Service GetGoalDetails (New)	Web Service Get Goals (New)	See Notes	With this enhancement, a new GetGoalDetails REST web service is now available. This web service can be used to retrieve a user's goal details.
Reports: Performance Review Standard Report Consistency	Performance Review Standard Report Consistency		For consistency with other reports and areas of Performance, the Performance Review Section Score Comparison Standard Report and Performance Review Score Standard Report have been renamed to Performance Review Section Rating Comparison Standard Report and Performance Review Rating Standard Report. The word "score" has been replaced with "rating." The report name, description, field names, report output, and permissions have all been updated to reflect this change.

Recruiting Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Add to/Move to Requisition	Add to/Move to Requisition		With this enhancement, the Add to Requisition and Move

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Enhancements	Enhancements		to Requisition actions allow compatible application components to be moved with the applicant (if the applicant has selected to be considered for other positions). When an applicant is added or moved, they will not need to complete application steps in the new requisition that are identical to application steps in the requisition from which they were added or moved. Also, the recruiter can choose to persist the original status status or select a new status when moving an applicant.
Apply with Seek	Apply with SEEK or LinkedIn Integration		<p>With this enhancement, the Apply with Seek integration is now available from the Edge Integration Center. This integration allows applicants to apply to jobs using their Seek profile. Prior to this enhancement, job applicants only had the ability to apply to jobs by either uploading their resumes or using their LinkedIn profile. The Apply with Seek integration provides an additional option for global applicants.</p> <p>In addition, Apply with LinkedIn will also be available as an integration from the Edge Integration Center.</p>
Approvals in	Approvals in		With this enhancement, users

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Universal Profile	Universal Profile		can now approve job requisitions and requisition requests from the Actions > Requests tab in the Universal Profile.
Connect With Us	Connect With Us		A Connect With Us page is added to Career Site Management. Connect With Us enables applicants to apply directly to a company instead of requiring applying to a specific requisition. Often, qualified candidates cannot find the ideal position on a career site. Connect With Us enables organizations to still capture the information from these applicants and find those applicants via a candidate search query.
Hiring Dashboard	Hiring Dashboard		The Hiring Dashboard provides hiring team members visibility into their requisitions, applicants, and other tasks all from a single page. The dashboard is organized by widgets that allow hiring managers, recruiters, and requisition approvers to drill into specific details of their own requisitions and applicants. This simplifies their processes for finding requisition and applicant data, reduces clicks, and avoids the need to learn or remember how to navigate through the system to find

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			information or perform actions.
Offer Letter SSO E-Signature	Offer Letter SSO E-Signature		With this enhancement, internal applicants at organizations that use Single Sign-On (SSO) will now be able to sign offer letters electronically using their SSO user credentials. Allowing electronic signatures using SSO credentials for offer letters means that organizations can truly use paperless offer letters for all applicants, whether external or internal.
Recruiting Usability Enhancements	Recruiting Usability Improvements		Enhancements apply to the Manage Applicants page and Broadbean postings, as well as adding a new permission for deleting languages in job requisitions.
Support User Types and Statuses	Support User Types and Statuses		<p>For portals that have Onboarding enabled and User Types and Statuses, a User Type section is added to the Applicant Profile > Launch Onboarding page. This section allows you to define the user type and user subtype, if applicable, for the onboarding user.</p> <p>In addition with this enhancement, the user status for external applicants will change from Onboarding to Working on their onboarding</p>

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			start date. The user status for internal applicants changes to Working on their onboarding start date.
Talent Pool Redesign Auto-upgrade	Talent Pool Redesign Auto-upgrade		With this enhancement, Talent Pools are now available for clients with Succession and/or Recruiting. The redesign matches old Talent Pools functionality, including the ability to add candidate from new Candidate Search Query and from Manage Applicants, as well as be able to add candidate to requisition, to group OU, and to Nomination List.
Web Service Job Requisition Custom Field (New)	Web Service Job Requisition Custom Field (New)	See Notes	With this enhancement, a new Job Requisition Custom Field REST web service is now available. This web service provides custom field data for a job requisition via REST Web Services.
Reports - ATS in Multi-Module Report	ATS in Multi-Module Report		With this enhancement, sections and fields from the Recruiting Custom Report are now available in the Multi-Module Custom Report.
Reports - New Fields in Recruiting Custom Reports	New Fields in Recruiting Custom Reports		With this enhancement, new fields are added and existing fields updated in the Applicant and Requisition sections of Recruiting Custom Reports.

Succession Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Job Pool Succession Report Permissions	Job Pool Succession Report Permissions		With this enhancement, two additional permissions are now available, the Custom Job Pool Succession Report - Create and Custom Job Pool Succession Report - View permissions. With the addition of these permissions, administrators can assign permissions to apply exclusively to Job Pool Succession Report. This allows for the creation of a separate group of users for the Succession Custom Report and Job Pool Succession Report.
Rich Text Editor in Resume Description	Rich Text Editor in Resume Description		With this enhancement, a rich text editor is now available when editing the description text for resume sections. This enables administrators to structure and format resume section descriptions more effectively. HTML formatted text can be added to resume section descriptions. If Universal Profile is being used, then this description is displayed on the Resume tab of Universal Profile. If Universal Profile is not being used, then this description is displayed in the Career Center.
Talent Pool Redesign Auto-upgrade	Talent Pool Redesign Auto-upgrade		With this enhancement, Talent Pools are now available for clients with Succession and/or Recruiting. The redesign matches old Talent Pools functionality, including the ability to add candidate from new Candidate Search Query and from

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			Manage Applicants, as well as be able to add candidate to requisition, to group OU, and to Nomination List.

New and Enhanced Permissions for July '16 Release

New Permissions

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

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
Core	User Preferences - Leave Types: Manage	Grants ability to manage Leave Types on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
Core	User Preferences - Termination Reasons: Manage	Grants ability to manage Termination Reasons on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
Core	User Preferences - User Statuses: Manage	Grants ability to manage User Statuses on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
Core	User Preferences - User Types and	Grants ability to manage User Types and Subtypes on the	Core Administration

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
	Subtypes: Manage	User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	
Core	Users - Edit Users Type and Status	Enables administrator to view and modify the type and status information for a user via the User Record. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration
Core	Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration
Learning	Course Code - Edit	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning Administration
Learning	Course Code - Manage	Grants ability to access and manage the Course Code Preferences. This is an administrator permission.	Learning Administration
Learning	Course Code - View	Grants ability to view Training Course Codes. This is an administrator permission.	Learning Administration
Learning	Test Partial Scoring - Manage	Grants ability to view and edit Partial Scoring for test engine Multiple Choice/Multiple Answer	Learning Administration

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		response type.	
Learning	xAPI - View Learning Records on Transcript	Allows users to view xAPI Learning Records on the Transcript.	Learning
Performance	Feedback Preferences - Manage	Enables administrator to access and edit the Feedback Preferences page. From this page, administrators can configure which options are available when users are requesting and providing feedback within the Universal Profile: Feedback page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile
Recruiting	Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard at all times; without this permission, access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager). This permission cannot be constrained.	Recruiting
Recruiting	Hiring Dashboard: View Other Dashboards	Grants the ability to view other users' dashboards. While viewing another user's dashboard, no actions can be taken on behalf of the dashboard owner. User also needs access to their own Hiring Dashboard before accessing other dashboards using this permission. This permission can be constrained by OU, User's OU, User, and User's Subordinates.	Recruiting

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
Recruiting	Localization: Delete language	Grants access to delete languages for a requisition. This permission cannot be constrained.	Recruiting
Succession	Custom Job Pool Succession Report - Create	Grants ability to create and edit custom Job Pool Succession reports. This permission can be constrained by OU, User's OU, User's Subordinates, and User Self and Subordinates.	Reports - Analytics
Succession	Custom Job Pool Succession Report - View	Grants ability to view results of custom Job Pool Succession reports created by self or shared by others. This permission can be constrained by OU, User's OU, User's Subordinates, and User Self and Subordinates.	Reports - Analytics
View	View Data: Preferences	Grants access View Data Preferences. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Subordinates, User's Direct Subordinates, and User's Corporation.	View
View	View Data: View	Grants access to View Data. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Subordinates, User's Direct Subordinates, and User's Corporation.	View

Enhanced Permissions

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

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
Performance	Performance Review Rating Report	This permission was renamed from Performance Review Score Report.	Reports - Performance
Performance	Performance Review Section Rating Comparison Report	This permission was renamed from Performance Review Section Score Comparison Report.	Reports - Performance
Reporting	Dashboard - View	This permission is updated to indicate that users must also have permission to view the standard or custom reports that are included in any shared dashboards.	Reports - Dashboards
Succession	Custom Succession Report - Create	This permission no longer grants the ability to create Custom Job Pool Succession Reports. This functionality is controlled by the new Custom Job Pool Succession Report - Create permission.	Reports - Analytics
Succession	Custom Succession Report - View	This permission no longer grants the ability to view Custom Job Pool Succession Reports. This functionality is controlled by the new Custom Job Pool Succession Report - View permission.	Reports - Analytics

Online Help Announcements

A new **Quick Start Guides** section has been added to Online Help. Quick Start Guides are short checklists that are designed to reduce the complexity of product understanding and help you evaluate the settings you have configured for various features and functionality. These guides can act as a supplement to product training so that you can review the configurations in your portal and ensure you are fully optimizing your functionality.

Release Notes Updates

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

Connect

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Full Text Editor	Full Text Editor Overview	Clarified that this enhancement only applies when creating or editing postings, including when creating postings within a cohort community template.

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manager Self Service Employee Relationships	Manager Self Service Employee Relationships Create Form - Employee Relationships	Added the Form Self-Service - Manage permission to the list of associated permissions.
Reports - Link User Audit Report	Reports - Link User Audit Report	Removed this topic because the enhancement is moved to the October '16 release.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Iterative Goal Planning	Performance Review Step Reopened Email Trigger	Clarified that when the Performance Review Step Reopened email trigger is configured, it is triggered any time a step is reopened, whether it is done by a manager or administrator.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Apply With Seek	Career Site - Job Details Page	Added a section that explains the user interface (UI) change on the job details page of the career site for the July '16 release.
Connect With Us	Career Site Settings - Add Connect With Us Link	This topic has been added to explain how to add the Connect With Us link to the career site.
Recruiting Usability Enhancements	Recruiting Usability Enhancements	<p>Added a note to the New Permission for Deleting Languages bullet to indicate that, as part of existing functionality, if the Allow Minimum Qualifications modification after a Requisition is opened option is disabled in Compliance Enablement Preferences, then languages cannot be deleted.</p> <p>Removed "on hold" from the Remove Broadbean Posting bullet. Job requisition postings that are in an On Hold status are not removed from Broadbean.</p>

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

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Publish Custom Charts to Dashboards	Publish Custom Charts to Dashboards Overview Custom Report	Clarified that a widget can only be shared with specific users, and the option to share the widget will not be clickable if shared with an OU.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Builder - Publish Tab for Widgets	

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Course Recommendations	Training Completion Page - Course Recommendations	Updated topic to include additional information about different scenarios which may impact how many course recommendations display to users on the Training Completion page.
Marking Training Complete After Launch	Material Versioning - In Progress Status	Updated topic to clarify that the enhancement applies to all types of material versioning.
System-Generated Course Code for Learning Objects	New and Enhanced Permissions	Updated the description for the Course Code - View permission to delete the word "edit," which was erroneously included in the description.
System-Generated Course Code for Learning Objects	Edit Course Code - Certification	Added new topic to describe how administrators can make changes to individual course codes when editing a certification through Certification Administration.
System-Generated Course Code for Learning Objects	Edit Course Code - Course Catalog	Added new topic to describe how administrators can make changes to individual course codes when editing an LO through the Course Catalog.
System-Generated Course Code for Learning Objects	Edit Course Code - Sessions	Added new topic to describe how administrators can make changes to individual course codes when editing a session through Manage Events & Sessions.
xAPI (Tin Can) on	Learning Record	Removed the xAPI - View

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Transcript	Notification	Learning Reporter permission, as it was included in this topic erroneously. This permission is not related to this enhancement.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Structured Feedback	Feedback - Request Feedback for Goal	Clarified the default visibility settings for a request for goal feedback.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Apply with Seek	Apply with Seek Overview	Clarified that the Apply with Seek integration is not available in the Edge Marketplace during UAT. This integration will only be available following the July '16 release.
Connect With Us	Career Site - Connect With Us Connect With Us Page - Areas of Interest Tab	Added text to indicate that when applicants view the areas of interest list on the career site, the list displays in alphabetical order.
Hiring Dashboard	Hiring Dashboard Overview	Added a consideration regarding navigation tabs and links.
Reports - New Fields in Recruiting Custom Reports	Reports - New Fields in Recruiting Custom Reports	Removed the Requisition Approved By - Full Name and Requisition Number of Submissions fields. Also, updated the description of the Applicant (User) Opt Out flag field.

12 August Patch Release Functionality

What's New for 12 August Patch Release

The following is released along with the 12 August patch release:

FEATURE	DESCRIPTION
Credit Card Processing Form	With this enhancement, when paying by credit card in the Shopping Cart, the Billing Address fields are reordered so that compliance requirements are met.
Resume Review Link in Emails	With this enhancement, when sending a resume review link from the Actions drop-down menu on the Manage Applicants page, the From: email address as viewed by the recipient's email client will now be the system-defined email address (based on the email address defined in the backend setting for the default email address for the From: field), and the Reply-To: email address will be the sender's email address.
Step Reopened in Custom Emails	With this enhancement, the Performance Review Step Reopened email is now available when the Custom Emails option is selected when configuring the review step workflow for performance review tasks. The Performance Review Step Reopened email is an existing email that is triggered when a performance review step is reopened in order to alert or remind the user that a performance step has been reopened.
User/OU Filters in Custom Reports	With this enhancement, when copying custom reports, any filters set on the User/OU Filters tab in the Report Designer are retained on the copied report.
View and Manage Onboarding for Direct Reports	With this enhancement, constraints are added to Onboarding permissions to provide managers with access to view and manager their direct reports' onboarding. Prior to this enhancement, the permission constraints were limited to OU (organizational unit) and User's OU.
View People Enhancements	With this enhancement, the following features are added to View People: <ul style="list-style-type: none"> ○ Add/Save Search to Favorites ○ Clear All Filters ○ Select All Employee Cards

Credit Card Processing Form

Credit Card Processing Form

With this enhancement, when paying by credit card in the Shopping Cart, the Billing Address fields are reordered so that compliance requirements are met.

Current Order of Billing Address Fields

The following shows the current order in which the fields in the Billing Address section appear in the Shopping Cart:

Current Address Form:

Billing Address

Your billing information should appear as it does on your credit card statement.

First Name *	Address Line 1 *	
<input type="text"/>	<input type="text"/>	
Last Name *	Address Line 2	
<input type="text"/>	<input type="text"/>	
Email *	City *	
<input type="text"/>	<input type="text"/>	
Country *	State/Province	Zip Code *
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>

New Order of Billing Address Fields

The following shows the new order in which the fields in the Billing Address section will appear in the Shopping Cart:

Billing Address

Your billing information should appear as it does on your credit card statement.

Email *

First Name *

Last Name *

Address Line 1 *

Address Line 2

City *

Country *

State/Province

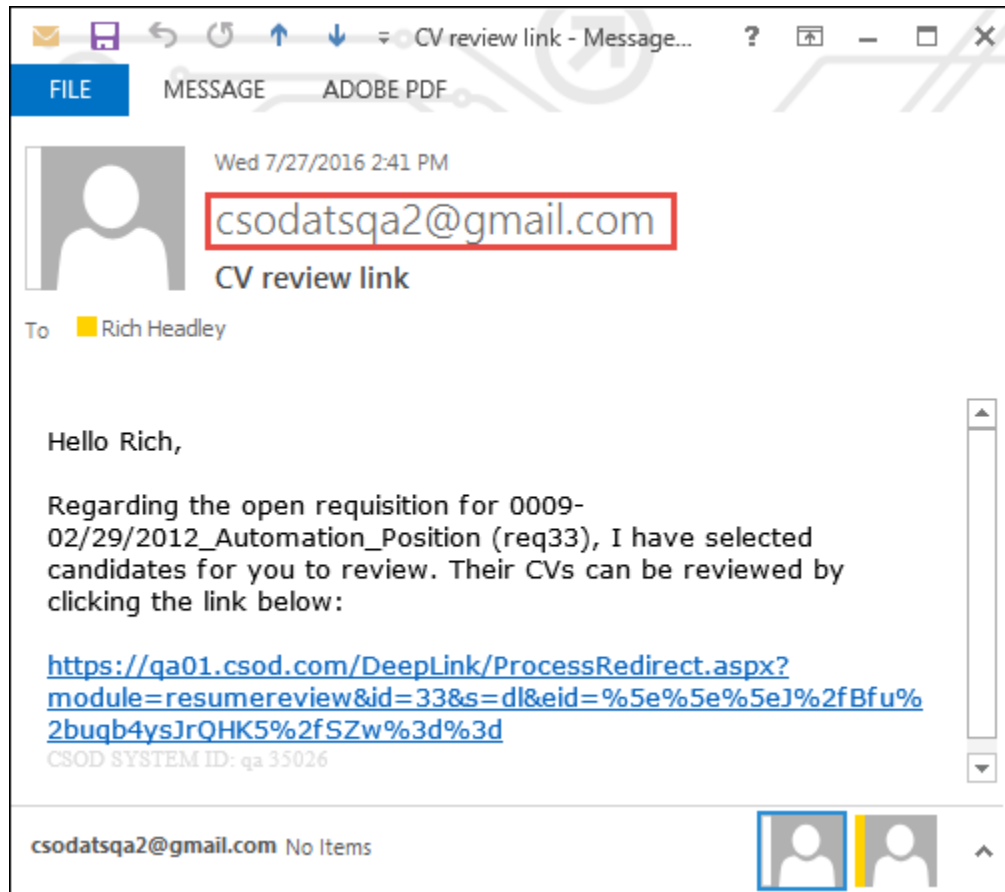
Zip Code *

Resume Review Link in Emails

Resume Review Link in Emails

With this enhancement, when sending a resume review link from the **Actions** drop-down menu on the Manage Applicants page, the **From:** email address as viewed by the recipient's email client will now be the system-defined email address (based on the email address defined in the backend setting for the default email address for the **From:** field), and the **Reply-To:** email address will be the sender's email address.

This enhancement can help reduce the incidence of emails being flagged as spam. This also allows recipients to reply to the email using the sender's email address.



Step Reopened in Custom Emails

Step Reopened in Custom Emails

With this enhancement, the Performance Review Step Reopened email is now available when the **Custom Emails** option is selected when configuring the review step workflow for performance review tasks. The Performance Review Step Reopened email is an existing email that is triggered when a performance review step is reopened in order to alert or remind the user that a performance step has been reopened.

Prior to this enhancement, the email was only available for performance review tasks when the **System Defaults** option was selected for the review step.

General
Review Workflow
Review Summary
Visibility
Confirm

Edit Review Step

Define Review Step

Step Title:

Assigned To:

☐ This step is optional. It will not affect the status of the overall review.

SECTIONS

Title	Version	Rights	Type	Previous Responses	Weight	Options
Total:				0%		

EMAIL ADMINISTRATION

☒ System Defaults - Use default emails based on settings and availability from email administration area. All emails related to this review step will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued. Note that for self-review steps, the employee will be treated as the employee and not the reviewer. Any emails directed towards the reviewer will be ignored for these steps.

☐ Custom Emails - All emails related to this review step may be customized. By default, triggers related to this step will be copied from the main email administration area. All emails sent related to this step will be sent based on the custom templates below. Changes made to the custom step emails will only apply to emails that have not yet been queued. Note that for self-review steps, the employee will be treated as the employee and not the reviewer. Any emails directed towards the reviewer will be ignored for these steps.

☐ No Emails - No emails will be sent in association with this review step. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

User/OU Filters in Custom Reports

User/OU Filters in Custom Reports

With this enhancement, when copying custom reports, any filters set on the User/OU Filters tab in the Report Designer are retained on the copied report.

Custom Report

Field Filters

User/OU Filters

Sort

Summary

Sharing

Schedule

Delivery

Chart

Publish

Select Criteria

▼

Create New Group

(1 Result)

🗑️

All users in Division:
Central

☒

Include
Subordinates

View and Manage Onboarding for Direct Reports

View and Manage Onboarding for Direct Reports

With this enhancement, constraints are added to Onboarding permissions to provide managers with access to view and manager their direct reports' onboarding. Prior to this enhancement, the permission constraints were limited to OU (organizational unit) and User's OU.

- **Onboarding - Manage** - This permission can now be constrained by User Self and Subordinates. This constraint helps managers to manage onboarding for their subordinates.
- **Onboarding - View** - This permission can now be constrained by User Self and Subordinates. This constraint helps managers to view onboarding for their subordinates.

View People Enhancements

View People Enhancements

With this enhancement, the following features are added to View People:

- **Add/Save Search to Favorites**
- **Clear All Filters**
- **Select All Employee Cards**

Add/Save Search to Favorites

A new favorites section is added to the bottom of the Filters panel. The favorites section allows you to add up to 20 searches as favorites and view your saved searches.

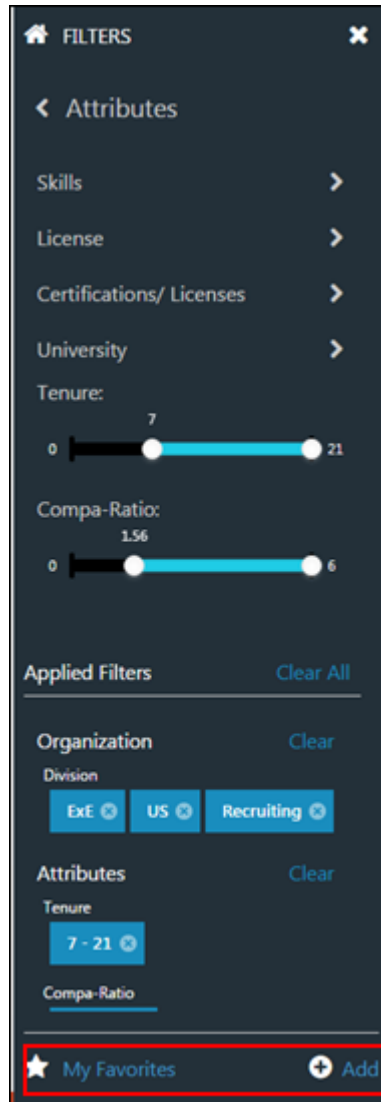
Add Searches to Favorites

To add a search as a favorite, click the **Add** option and name the search, up to 45 characters. This saves the search with all of the filters you have selected in the Filters panel.

View Saved Searches

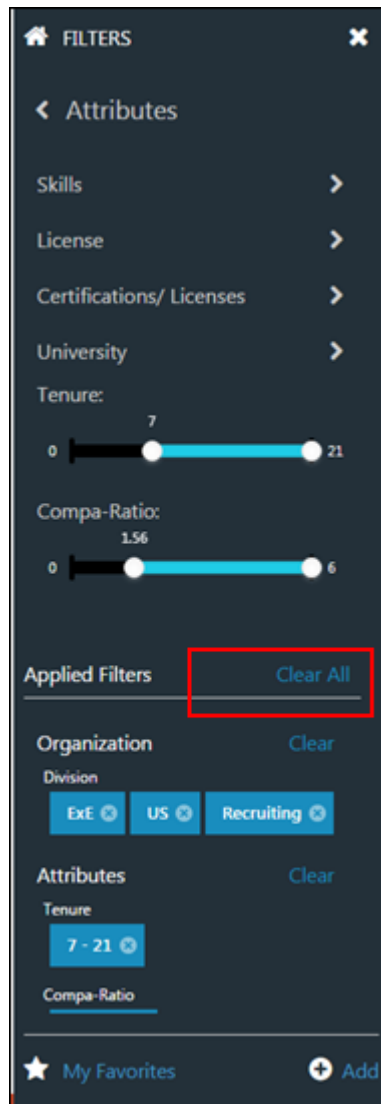
To view your favorite searches, click **My Favorites**. This allows you to see a list of your favorites and select the search that you would like to view. You can modify the filters you selected for the saved search, and then save the search again or save it with a different name.

Note: *When viewing saved searches, the only saved data is the filters that were selected in the Filters panel. Any employee cards that were selected when the search was saved are not retained. In addition, any color criteria defined in the Color by field are not retained.*



Clear All Filters

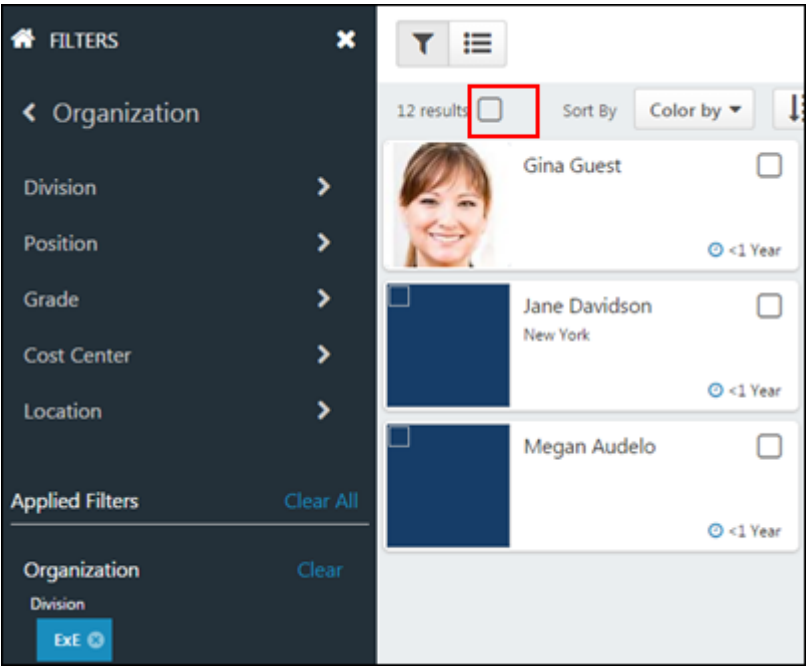
A **Clear All** option is added to the Applied Filters section of the Filters panel. Click **Clear All** to remove all the filters that you have selected in the Filters panel. There is no undo option for this action.



Select All Employee Cards

A select all/deselect all checkbox is added to the right of the number of results on the View People page. Check the box to select all of the employee cards that are on the current page of results. Uncheck the box to deselect all of the employee cards on the page.

Note: When selecting all cards, any cards that are currently selected remain selected. If you deselect all cards, then all cards are deselected, which includes any cards that were selected prior to selecting all cards.



Compensation

Compensation Usability Enhancements

Compensation Usability Enhancements

With this enhancement, the **Wage Types** options appear in a drop-down menu when creating or editing an adjustment guideline. In addition, when viewing the Summary tab or Approval tab for a compensation plan, the Effective Date is now displayed for each component in the compensation plan. This indicates when the changes for each component will be effective if the compensation plan is approved.

Implementation

This functionality is automatically enabled for all organizations using the Compensation module.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Adjustment Guidelines - Manage	Grants ability to define and maintain compensation recommendations and guidelines for both salary and hourly employees. This permission can be constrained by User. This is an administrator permission.	Compensation - Administration
Compensation Plan - Manage	Grants Compensation Managers the ability to access to the landing page of their assigned compensation tasks. This permission also grants the ability to create and manage compensation plans within the task. This permission cannot be constrained. This is an end user permission.	Compensation

Base Adjustment Guideline - Create

Prior to this enhancement, the **Wage Types** options appeared as radio buttons.

With this enhancement, the **Wage Types** options appear in a drop-down menu.

To create an adjustment guideline, go to **ADMIN > TOOLS > COMPENSATION MANAGEMENT > ADJUSTMENT GUIDELINES**. Then, click the **Create New Adjustment Guideline** link.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Adjustment Guidelines - Manage	Grants ability to define and maintain compensation recommendations and guidelines for both salary and hourly employees. This permission can be constrained by User. This is an administrator permission.	Compensation - Administration

Adjustment Guidelines	
DEFINE ADJUSTMENT GUIDELINE Define adjustment guidelines for any compensation component. Set availability to apply the guideline to a specific set of users. A specific amount can be set for the guideline. If the guideline is for merit increase, bonus, or equity, a recommendation matrix and adjustment rules may be defined for the guideline.	
Name: <input type="text"/>	
COMPONENT	
Type: Please select the component type before proceeding.	
Base <input type="text"/>	
Components: <input type="text"/>	
DETAILS	
Effective Period: From: <input type="text"/> To: <input type="text"/>	
Type:	
<input type="radio"/> Specific Amount <input checked="" type="radio"/> Recommendation Matrix <input type="radio"/> Custom Formula	
Currency: USD	
AVAILABILITY	
<input type="radio"/> Default Guideline <input checked="" type="radio"/> <input type="text"/>	
Wage Types: <input type="text"/>	
ADJUSTMENT	
<input checked="" type="radio"/> Discretionary <input type="radio"/> Non-Discretionary	
* Please define matrix rating and columns before creating matrix	
Matrix Rating out of: <input type="text"/>	Define Columns:
	Total Columns: <input type="text"/>
Add Metric	Metric: Compa Ratio (Position in Salary Range) <input type="checkbox"/> Include Below Salary Range column <input type="checkbox"/> Include Above Salary Range column
<input type="text"/> Create Matrix	
ADJUSTMENT RULES	
<input type="checkbox"/> Adjustment must be:	
<input checked="" type="radio"/> On or below maximum recommendation	
<input type="radio"/> May be over maximum recommendation by <input type="text"/> %	
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

Summary Tab - Effective Date

With this enhancement, when viewing the Summary tab or Approval tab for a compensation plan, the Effective Date is now displayed for each component in the compensation plan. This indicates when the changes for each component will be effective if the compensation plan is approved.

The Effective Date for each component is set when the component template is added to the compensation task.

For standard off-cycle compensation tasks, this functionality is only available if the Effective Date setting for the task is configured so that the assigner can define the effective date at the launch of the task.

For modeling compensation tasks, this functionality is not available.

To create a compensation plan for a compensation task, go to **HOME > SCHEDULED TASKS**. Click the compensation task title. Click the Compensation Plans tab. Then, click the **CREATE PLAN** button.

An off-cycle compensation task can be launched via Universal Profile and My Team.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Plan - Manage	Grants Compensation Managers the ability to access to the landing page of their assigned compensation tasks. This permission also grants the ability to create and manage compensation plans within the task. This permission cannot be constrained. This is an end user permission.	Compensation

Pay for Performance Annual Compensation Task

Curtis Simms

Compensation Plan

Options ▼

Curtis Simms

Director

Compensation Period

1/1/2014 - 12/31/2014

Base

Bonus

Equity

Summary

Base Effective Date: 12/31/2016

Bonus Effective Date: 12/31/2016

Currency: USD

☐ Show Ineligible Employees

☐ Show All Comments

Plan Details

Name	Performance	Last Hire Date	Currency	Current Salary/...	Merit Increase	Promotion	New Salary/Ra...	% Attained	Perf
<div> <div>Marissa Andrews</div> <div>Manager</div> </div>	<div>4.5 / 5.0</div> <div>Exceptional Performance</div>	6/12/2009	USD	45,700.20	3,884.52	0.00	49,584.72	162.50 %	
<div> <div>Clark Cohen</div> <div>Manager</div> </div>	<div>4.0 / 5.0</div> <div>Exceeds Expectations</div>	12/27/2007	USD	45,700.20	2,285.01	0.00	47,985.21	137.50 %	
<div> <div>Jacob Jackson</div> <div>Manager</div> </div>	<div>3.5 / 5.0</div> <div>Exceeds Expectations</div>	7/30/2008	USD	44,398.20	2,219.91	0.00	46,618.11	137.50 %	
<div> <div>Michelle Rogers</div> <div></div> </div>	<div>3.0 / 5.0</div> <div>Meets Expectations</div>	12/1/2008	USD	14.44	0.00	0.00	14.44	112.50 %	
<div> <div>Carlos Santo</div> <div>Customer Service Represe...</div> </div>	<div>5.0 / 5.0</div> <div>Exceptional Performance</div>	5/8/2011	USD	50,846.61	1,016.93	0.00	51,863.54	162.50 %	
<div> <div>Kate Summers</div> <div>Customer Service Represe...</div> </div>	<div>3.4 / 5.0</div> <div>Meets Expectations</div>	1/4/2010	USD	47,672.76	0.00	0.00	47,672.76	137.50 %	

(6 Results)

Universal Profile Request for Compensation Approvals

Universal Profile Request for Compensation Approvals

With this enhancement, a user can complete Compensation approvals from the Request tab within Universal Profile: Actions. This allows the managers to more efficiently provide approvals.

Implementation

This functionality is automatically enabled for all organizations using the Compensation module and Universal Profile: Actions.

Security

The following existing permissions apply to this functionality:

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

Actions - Requests - Compensation 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 compensation plan approval requests that require their approval or denial 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
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
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 compensation 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 open the Approval tab of the compensation plan.
- Due Date - This displays the due date for the compensation plan.
- Status - This displays the current status of the request.
- Compensation Manager - This displays the user who is serving as the compensation manager for the compensation plan.

Options

The following option may be available from the action item drop-down menu for compensation managers and co-planners:

- Approve Plan - This option opens the Approval tab of the compensation plan. Compensation plan approvers can only approve a compensation plan from the Approval tab of the compensation plan. This ensures the approver has viewed the details of the compensation plan that is being approved.

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

The screenshot displays the 'Actions' page for user Reyhan Jhaver. The page is divided into a sidebar on the left and a main content area. The sidebar contains navigation links: Bio, Feedback, Transcript, Actions (highlighted), and Snapshot. The main content area has a header with the user's name and the page title 'Actions'. Below the header, there are tabs for 'Actions (6)' and 'Requests (2)'. A search bar is present with filters for 'Compensation', 'By Date Submitted', and 'Show All'. The main content area lists two compensation actions under the 'Compensation' tab. Both actions are titled 'Approve: 2015 Merit Cycle' and have a status of 'Pending Approval'. The first action is for Phillip Jones and the second is for Nikolai Sobolev. Both actions have a start date of 9/29/2015 and a due date of 3/25/2016. The page also includes a color strip key at the top of the sidebar.

Connect

Community Feed

Community Feed Overview

With this enhancement, a Community Feed can now be included on the main page of a community. The Community Feed may display the latest activity for the specific community. In addition, community members may be able to create discussion postings directly from the Community Feed.

The Community Feed may be displayed for any community type and the Knowledge Bank.

Use Cases

1. Chris is a Product Manager at Acme Corp. When he first began working at Acme Corp., he created a Product Management community to collaborate with his colleagues on the latest and greatest tools and best practices in Product Management.
2. He saw a lot of participation when the community was launched but participation has since waned. When asked, his members cited that it took a lot of effort to know what the latest content was. Also, it took almost as much effort to create a posting. Eventually, they stopped going to the community.
3. Chris turns on the Community Feed feature and informs his member of the new enhancement. His members can now see the latest content with a preview of each posting, which they can like or reply to. They can also add posts to topics from the feed. The best part is this all happens directly from the Community main page.
4. Chris sees participation dramatically increase and his community starts to thrive.

Considerations

Likes and votes between the Community Feed activity update and the posting itself are not currently synced.

Replies and threaded replies between the Community Feed activity update and the posting itself are not currently synced.

Implementation

This functionality is automatically available for all organizations using the New Connect functionality.

Configuration is done through the Edit Community page. Community Feed is off by default for existing communities and is enabled for newly created communities.

Whether or not posting replies appear as an activity update in the Live Feed is dependent on whether the **New posting/reply created (visible to all community members)** option is selected in Connect Preferences.

Glossary

- Community Feed - The Community Feed may be enabled to display on the Main tab of a community. The Community Feed may display the latest activity for the specific community. In addition, community members may be able to create discussion postings directly from the Community Feed.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edit Availability Knowledge Bank/Communities	Grants ability to configure the availability when editing communities or when creating or editing topics. This permission does not grant the ability to edit a community; users can only edit a community or topic if they have the Manage Knowledge Bank/Communities Administration or if they are a moderator for the community or topic. When creating a topic, the constraints on this permission are automatically applied to the topic's availability. If the user also has the Manage Knowledge Bank/Communities Administration permission, then the constraints on that permission are automatically applied to the topic's availability. This permission can be constrained by OU, User's OU, and User's Corporation.	New Connect
Global Search - People	Grants ability to search for people via Global Search. If this permission is constrained to a specific OU, then that constraint is automatically applied within Global Search, including search filters and search results. This is an end user permission. The availability of this permission is controlled by a backend setting.	Core
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page and manage Action Groups. 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

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

Connect Preferences

Prior to this enhancement, administrators could not prevent posting replies from appearing in the Live Feed.

With this enhancement, administrators now have the option to prevent or enable posting replies to appear in the Live Feed.

To access the Connect Preferences page for Redesigned Connect, go to **ADMIN > TOOLS > CONNECT > NEW CONNECT ADMINISTRATION > CONNECT PREFERENCES**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Search - People	Grants ability to search for people via Global Search. If this permission is constrained to a specific OU, then that constraint is automatically applied within Global Search, including search filters and search results. This is an end user permission. The availability of this permission is controlled by a backend setting.	Core
View New Connect Preferences	Grants ability to view and manage the New Connect Preferences. This permission can be constrained by OU and User's OU.	New Connect

Within the Communities Activity Update Display Options section, the following changes have been made:

- The name of the **New posting created (visible to all community members)** option is updated. The following is the new option name:
 - **New posting/reply created (visible to all community members)**
- The description for this option is updated. The following is the new option description:
 - Enable a preference to display an activity update whenever a new posting/reply is created in a community. There is no activity update for replies to other replies.

This option only applies to the Live Feed. This activity cannot be hidden from the Community Feed.

Communities Activity Update Display Options		
Include	Preference	Description
<input checked="" type="checkbox"/>	New posting/reply created (visible to all community members)	Enable a preference to display an activity update whenever a new posting/reply is created in a community. There is no activity update for replies to other replies.
<input type="checkbox"/>	New posting created for followers (visible to all following users)	Enable a preference to display an activity update whenever a new posting is created in a followed community or topic or is created by a followed author.

Community - Create/Edit

With this enhancement, a Community Feed can now be included on the main page of a community. The Community Feed may display the latest activity for the specific community. In addition, community members may be able to create discussion postings directly from the Community Feed.

The Community Feed may be displayed for any community type and the Knowledge Bank.

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

To edit a community, on the Community page, select **Edit Community** from the **Options** drop-down menu.

Permissions

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

A Community Feed is a feed that is displayed on the Main tab of the community. The Community Feed may display the latest activity for the specific community. In addition, community members may be able to create discussion postings directly from the Community Feed.

Select whether the Community Feed is enabled for the community. With the July '16 release, the feed is disabled for all existing communities. For new communities, the feed is enabled by default.

Communities

Create Community

Create Community

Details

Title *

Description *

B I S U [List Icons] ABC

Banner

Custom HTML Widget

HTML File

Community Feed

Membership

Availability Selection Criteria

Note: For best results, upload an image with the size 1004x150 pixels.

Note: If you upload a blank HTML file or do not upload a file, this widget will not display.

A community-specific activity feed will be displayed on the community main page.

Users that fall within availability see a "Join" button on the Community Main page, then become a part of the community after clicking "Join".

Criteria	Include Subordinates	Action Group
Cancel Done		

Community - Main Tab - Community Feed

With this enhancement, a Community Feed can now be included on the main page of a community. The Community Feed may display the latest activity for the specific community. In addition, community members may be able to create discussion postings directly from the Community Feed.

The Community Feed may be enabled for any community type and the Knowledge Bank.

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 and manage Action Groups. 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 Feed and Activity Update Visibility

The Community Feed is only visible if it is enabled and if the user has joined the community. However, administrators who have the Manage Knowledge Bank/Communities Administration permission can always view the Community Feed.

An update is only visible in the Community Feed if the user has permission to view the corresponding posting.

If a posting or reply is deleted, then the activity update is removed from the Community Feed.

Create Discussion Posting from Community Feed

From the Community Feed, users may be able to create a new discussion posting and select the topic into which the posting will be added. If there are no topics for which the user has permission to create a posting, then this functionality is not available.

To create a discussion posting, select within the **Create a discussion posting** field. The panel expands to show the **Select Topic** drop-down and the **POST** and **CANCEL** options.

See **Community Feed - Create Posting** on page 85 for additional information.

Activity Updates

The following activities may appear in the Community Feed:

- Posting Created - When a new posting is created in the community, this activity may be displayed in the feed. The first 300 characters of the posting body is displayed in the feed. No HTML is displayed in the feed.
- Posting Reply - When a reply is added to a posting within the community, this activity may be displayed in the feed. The first 300 characters of the posting body is displayed in the feed. No HTML is displayed in the feed.

New activity updates are displayed at the top of the Community Feed.

Activity Update Options

Users have the option to like and reply to an activity update. However, the ability to vote for or against a suggestion type posting is not available from the Community Feed.

Any replies or likes that are added to activity updates in the Community Feed will also appear for the activity update in the Live Feed.

Note: *Likes and votes between the Community Feed activity update and the posting itself are not currently synced. Also, replies and threaded replies between the Community Feed activity update and the posting itself are not currently synced.*

Show More

When viewing the Community Feed, up to 10 items are displayed. If there are more than 10 items available, then a **SHOW MORE** button is available at the bottom of the feed. Select this button to view 10 more items within the feed.

Widgets

When the Community Feed is enabled, the widgets on the Main tab are rearranged so that the Community Feed is displayed in the left column.

For Communities, Cohort Communities, and Knowledge Bank, the Featured and Trending widgets are moved to the right column on the Main tab of the community. The widgets in the right column are displayed in the following order:

- Members
- Featured
- Popular tags

- Trending
- Leaderboard

For Learning Communities, the Featured and Trending widgets are moved to the right column on the Main tab of the community. The Training widget is not impacted. The widgets in the right column are displayed in the following order:

- Members
- Featured
- Popular Tags
- Course Ratings
- Trending
- Leaderboard

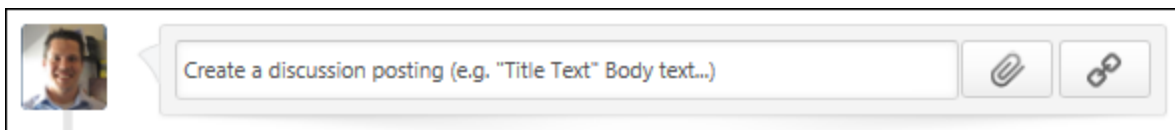
Community Feed - Create Posting

From the Community Feed, users may be able to create a new discussion posting and select the topic into which the posting will be added. If there are no topics for which the user has permission to create a posting, then this functionality is not available.

To create a discussion posting, select within the **Create a discussion posting** field. The panel expands to show the **Select Topic** drop-down and the **POST** and **CANCEL** options.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page and manage Action Groups. 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




Posting Title and Body

When creating a posting from the Community Feed, users must set a title for the posting and add body text.

To set a title for the posting, enter the posting title in quotation marks. Then, enter the body text for the posting after the posting title. If a title is not provided in quotation marks at the beginning of the posting, then the first 70 characters of the posting text will be used as the title.

Hashtags can be used in the posting body text. A maximum of 3,000 characters can be entered.

For information on how to set the posting title and body text, hover the cursor over the Information icon  in the upper-right corner of the **Create a discussion posting** field.

Attach a File

To attach a file to your posting, click the **ATTACH FILE** button  below the right of the **Create a discussion posting** field.

Include URL Preview

When creating a posting from the Community Feed, you can include a URL with the post. [See Live Feed - Include URL Preview.](#)

Select Topic

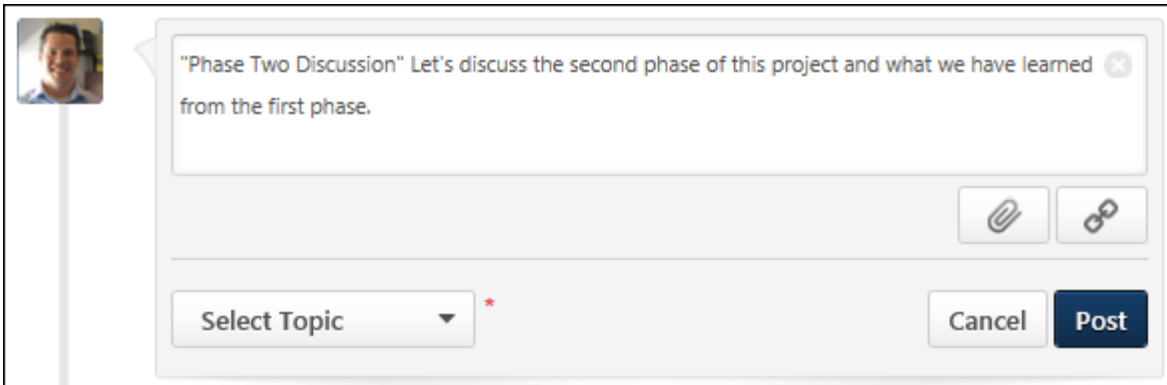
A posting must be associated with a topic so that the system knows where the posting should be created.

To set the topic into which the new posting should be created, select the appropriate topic from the **Select Topic** drop-down list.

Within the drop-down menu, the topics that were most recently selected by the user are displayed first with "(Recent)" appended to the topic title to indicate that it is a topic that was recently selected. Following the recently selected topics, all available topics are displayed in alphabetical order. Topics are only displayed if they are available to the user. Up to 10 topics are displayed in the drop-down menu.

Post or Cancel

After entering the appropriate title and body text, attaching any necessary files, and setting the posting topic, select **POST** to create the posting, or select **CANCEL** to discard the posting.



The screenshot shows a user interface for creating a discussion posting. On the left is a small profile picture of a man. To its right is a text input area containing the title "Phase Two Discussion" and the body text "Let's discuss the second phase of this project and what we have learned from the first phase." Below the text area are two buttons: "Attach File" (with a paperclip icon) and "Include URL Preview" (with a chain link icon). At the bottom left is a dropdown menu labeled "Select Topic" with a red asterisk indicating it is required. At the bottom right are two buttons: "Cancel" and "Post".

Live Feed

With this enhancement, posting replies may appear in the Live Feed. When a user replies to a post within a topic that the user is following, this activity may be displayed in the Live Feed. This enables users to quickly view the latest interactions regarding topics the user is following. The Live Feed only displays replies that are made directly to a posting. That is, if a user replies to another reply, then this activity is not displayed in the Live Feed.

To access the Live Feed, go to **CONNECT > LIVE FEED**.

Permissions

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

The following information is displayed in the activity update:

- Community name
- Reply author
- Posting title
- Reply body up to 300 characters
- Reply date

From the Live Feed, users have the following options:

- Reply to the activity update
- Like the activity update
- Like replies to the activity update

Note: *If the activity update is liked by a user from the Live Feed, this is not synced with the number of likes that are displayed when viewing the Posting Details page.*

Configurable Action Groups

Configurable Action Groups Overview

Within Connect, action groups are used to grant users certain permissions with regards to a community or topic. When availability is set for a community or topic, each criterion is associated with an action group which enables the users within the selected availability criterion to perform the actions associated with the selected action group.

Prior to this enhancement, only system-defined action groups were available which cannot be modified.

With this enhancement, administrators can customize the abilities of action groups within a community. This means that admins can add or remove abilities for action groups to best suit their purposes. This level of customization will help organizations maximize the functionality of Connect.

Use Case - Wiki-like Community

1. Michael is the Vice President of Application Development at ACME Corp.
2. He knows that for his development group to operate efficiently, they need to share and learn from each other.
3. He builds a Development Center of Excellence community in Connect for his developers.
4. He wants the community to behave like a wiki, where users can add postings about development best practices and others can edit them.
5. Michael navigates to the Connect administration space and creates a new custom action group.
6. He assigns all the normal privileges of a community "Member," but also includes the ability to "Edit Any Post."
7. Michael then assigns the development division to this action group at the community level, and now his community functions like a wiki.

Use Case - Reply-only Community

1. Robert is a Training Expert at ACME Corp.
2. Robert has created a Cohort Community for collaborative onboarding training for new hires.
3. Robert wants a space in the community where only he can pose questions to the community members.
4. Robert creates a custom action group that allows users to reply to postings but not create the postings themselves. Robert then creates a topic in his community and assigns all users to this action group.

Considerations

The ability for configurable action groups to delete posts and replies will be added as an available option in a future release. Existing action groups' abilities will remain the same.

When a change to an action group is made, it will apply immediately to all members of the action group.

Deleting a custom action group is currently not supported.

Implementation

This functionality is automatically enabled for all organizations using the new Connect module.

Users with the existing Manage Knowledge Bank/Communities Administration permission have access to the Manage Action Groups page.

Security

The following existing permissions apply to this functionality:

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

Manage Action Groups

Within Connect, action groups are used to grant users certain permissions with regards to a community or topic. When availability is set for a community or topic, each criterion is associated with an action group, which enables the users within the selected availability criterion to perform the actions associated with the selected action group.

Prior to this enhancement, only system-defined action groups were available, which cannot be modified.

With this enhancement, a new Manage Action Groups page is now available, which enables administrators to define and configure custom action groups. All administrator-defined and system-defined action groups are available when creating or editing a community or topic.

To manage action groups for Connect, go to **ADMIN > TOOLS > CONNECT > ACTION GROUPS**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page and manage Action Groups. 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

Action Group - Create

To create a custom action group, click the **CREATE ACTION GROUP** button. See **Action Group - Create/Edit** on page 93 *for additional information*.

Action Group - Edit

To edit an existing custom action group, click the action group name in the table. When a change to an action group is made, it will apply immediately to all members of the action group. See **Action Group - Create/Edit** on page 93 *for additional information*.

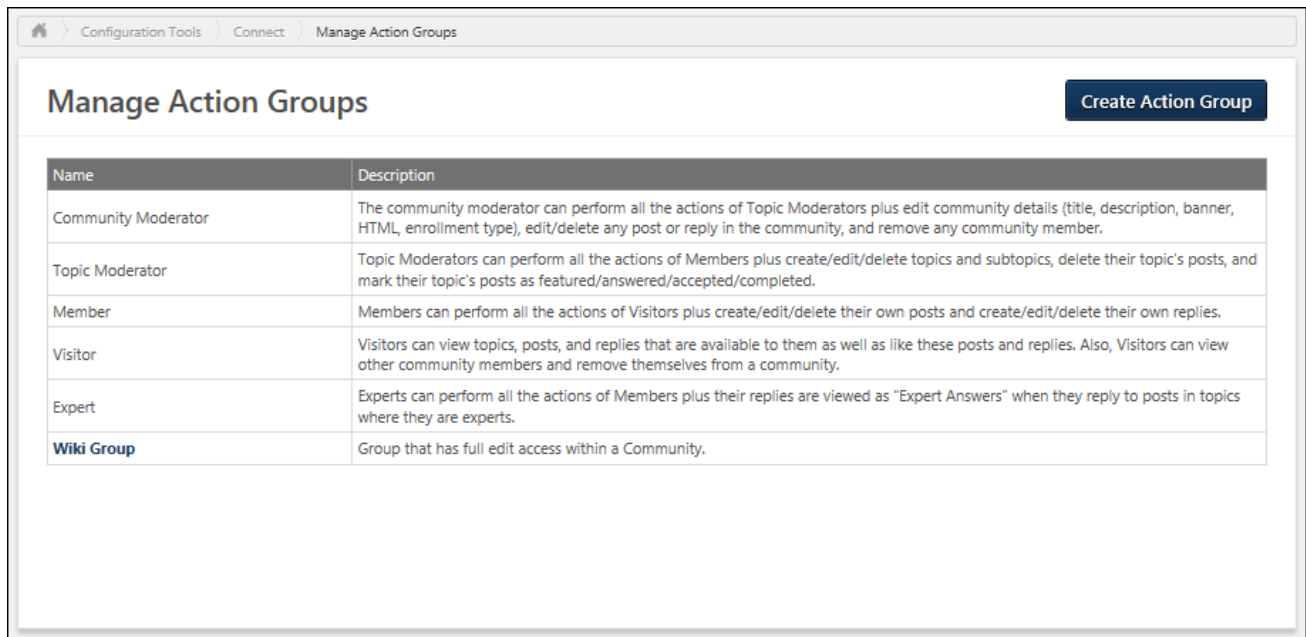
System-defined action groups cannot be edited.

Action Groups Table

The Manage Action Groups page displays all existing action groups, including all system-defined and custom action groups.

The following information is displayed for each action group:

- Name
- Description



Name	Description
Community Moderator	The community moderator can perform all the actions of Topic Moderators plus edit community details (title, description, banner, HTML, enrollment type), edit/delete any post or reply in the community, and remove any community member.
Topic Moderator	Topic Moderators can perform all the actions of Members plus create/edit/delete topics and subtopics, delete their topic's posts, and mark their topic's posts as featured/answered/accepted/completed.
Member	Members can perform all the actions of Visitors plus create/edit/delete their own posts and create/edit/delete their own replies.
Visitor	Visitors can view topics, posts, and replies that are available to them as well as like these posts and replies. Also, Visitors can view other community members and remove themselves from a community.
Expert	Experts can perform all the actions of Members plus their replies are viewed as "Expert Answers" when they reply to posts in topics where they are experts.
Wiki Group	Group that has full edit access within a Community.

Action Group - Create/Edit

Within Connect, action groups are used to grant users certain permissions with regards to a community or topic. When availability is set for a community or topic, each criterion is associated with an action group, which enables the users within the selected availability criterion to perform the actions associated with the selected action group.

Prior to this enhancement, only system-defined action groups were available, which cannot be modified.

With this enhancement, administrators can define and configure action groups. All administrator-defined and system-defined action groups are available when creating or editing a community or topic.

To create an action group for Connect, go to **ADMIN > TOOLS > CONNECT > ACTION GROUPS**. Then, click the **CREATE ACTION GROUP** button.

To edit an action group for Connect, go to **ADMIN > TOOLS > CONNECT > ACTION GROUPS**. Then, click the action group name.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Knowledge Bank/Communities Administration	Grants ability to view the New Knowledge Bank Administration page and manage Action Groups. 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

Enter the following information for the action group:

- **Name** - Enter a descriptive name for the action group. This name will be displayed when defining availability for a Connect community or topic. The character limit is 70.
- **Description** - Enter a meaningful description for the action group that describes the group's purpose. This description is only displayed on the Manage Action Groups page. The description is not displayed when defining availability for a Connect community or topic. The character limit is 1,000.
- **Actions** - In this section, select which actions are available to users within the action group.

Action Group Actions

Note: *Users with the Manage Knowledge Bank/Communities Administration permission can always perform any of the below actions, regardless of their action group settings.*

The following actions are available when configuring an action group:

- Create Reply - This action enables users to reply to a posting within the community or topic. When this option is not selected, users cannot participate in posting discussions.
 - Within system-defined action groups, this action is disabled for Visitors and enabled for all others.
- Edit Own Reply - This action enables users to edit text they have posted in reply to a posting within the community or topic. When this option is not selected, users do not have the option to edit a reply they have added to a posting. This includes any replies the user has added to the posting or to another comment within the posting.
 - Within system-defined action groups, this action is disabled for Visitors and enabled for all others.
- Like/Vote Reply - This action enables users to provide feedback on replies by liking or voting on a posting reply within the community or topic. When this option is not selected, the Like or Vote options are not available when viewing a posting reply. Users are always able to view the number of likes or votes a reply has received even if they cannot like or vote for the reply.
 - Within system-defined action groups, this action is enabled for all action groups.
- Create Post - This action enables users to create posts within the community or topic. When this option is not selected, the option to create a posting is not available when viewing a topic. This applies to all posting types.
 - Within system-defined action groups, this action is disabled for Visitors and enabled for all others.
- Edit Own Post - This action enables users to edit a posting that they have created. When this option is not selected, user do not have the option to edit their posting once they have created it.
 - Within system-defined action groups, this action is disabled for Visitors and enabled for all others.
- Like/Vote Posting - This action enables users to provide feedback on postings by liking or voting on a posting within the community or topic. When this option is not selected, the Like or Vote options are not available when viewing a posting. Users are always able to view the number of likes or votes a posting has received even if they cannot like or vote for the posting.
 - Within system-defined action groups, this action is enabled for all action groups.
- Edit Any Post - This action enables users to edit any posting within the community or topic. When this option is not selected, users can only edit postings based on their other available actions. For example, users may be granted the ability to edit their own posts.
 - Within system-defined action groups, this action is enabled for Community Moderators and disabled for all others.
- Edit Any Reply - This action enables users to edit any posting reply within the community or topic. When this option is not selected, users can only edit posting replies

based on their other available actions. For example, users may be granted the ability to edit their own post replies.

- Within system-defined action groups, this action is enabled for Community Moderators and disabled for all others.

When a change to an action group is made, it is immediately applied to all members of the action group.

Save/Cancel

Click **SAVE** to create the action group or save any changes to the group.

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

Configuration Tools > Connect > Manage Action Groups > Create Action Group

Create Action Group

Name *

Description

Actions

<input type="checkbox"/>	Action	Description
<input type="checkbox"/>	Create Reply	This is the ability to create a reply to a post or another user's reply.
<input type="checkbox"/>	Edit Own Reply	This is the ability for reply authors to edit their own replies.
<input type="checkbox"/>	Like/Vote Reply	This is the ability to like, unlike, upvote and downvote replies.
<input type="checkbox"/>	Create Post	This is the ability to create a post.
<input type="checkbox"/>	Edit Own Post	This is the ability for post authors to edit their own posts.
<input type="checkbox"/>	Like/Vote Posting	This is the ability to like, unlike, upvote and downvote postings.
<input type="checkbox"/>	Edit Any Post	This is the ability to edit posts created by others, as well as your own.
<input type="checkbox"/>	Edit Any Reply	This is the ability to edit any reply.

Cancel Save

Community - Custom Action Groups

Within Connect, action groups are used to grant users certain permissions with regards to a community or topic. When availability is set for a community or topic, each criterion is associated with an action group, which enables the users within the selected availability criterion to perform the actions associated with the selected action group.

Prior to this enhancement, only system-defined action groups were available.

With this enhancement, administrators can define and configure action groups. All administrator-defined and system-defined action groups are available when creating or editing a community or topic.

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

To edit a community, on the Community page, select **Edit Community** from the **Options** drop-down menu.

Permissions

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

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

When setting the availability for a community, each criterion within the availability can now be associated with a custom action group. Within the Action Group drop-down, custom action groups appear after system-defined action groups. Custom action groups appear in the order in which they were created with the newest custom action group displayed last.

This functionality is available when creating or editing communities and learning communities.

Communities
Create Community

Create Community

Details

Title *

Description *

B **I** **S** **U**

- -
 -
- -
 -
- -
 -
- -
 -
- ABC

Banner

Drag and drop files here or
Select a file

Note: For best results, upload an image with the size 1004x150 pixels.

Custom HTML Widget

HTML File

Select a HTML file

Note: If you upload a blank HTML file or do not upload a file, this widget will not display.

Membership

Invitation

Users that fall within availability see a "Join" button on the Community Main page, then become a part of the community after clicking "Join".

Availability Selection Criteria

Select OU Criteria

Criteria	Include Subordinates	Action Group

Cancel
Done

Topic - Custom Action Groups

Within Connect, action groups are used to grant users certain permissions with regards to a community or topic. When availability is set for a community or topic, each criterion is associated with an action group, which enables the users within the selected availability criterion to perform the actions associated with the selected action group.

Prior to this enhancement, only system-defined action groups were available.

With this enhancement, administrators can define and configure action groups. All administrator-defined and system-defined action groups are available when creating or editing a community or topic.

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

To create a subtopic within a topic, on the Topic Details page, select **Create Subtopic** from the **Manage Topic** drop-down menu. *See [Community Topic - Topic Details Page for additional information](#).*

To edit a topic, on the Topic Details page, select **Edit Topic** from the **Manage Topic** drop-down menu. *See [Community Topic - Topic Details Page for additional information](#).*

Permissions


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

<p>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.</p>
--

When setting the availability for a topic, each criterion within the availability can now be associated with a custom action group. Within the Action Group drop-down, custom action groups appear after system-defined action groups. Custom action groups appear in the order in which they were created with the newest custom action group displayed last.

This functionality is available when creating or editing topics.

Communities
Executive Leadership
Topics
C-level
Edit Topic



Edit Topic

Details

Title *

C-level

Description

Additional material targeting leaders who perform at the C-level within the organization.

Shared to Communities

Add Community

Executive Leadership Community	View Availability
New Hire Orientation Community	View Availability
Tech Services Community	View Availability

Availability Selection Criteria

Select OU Criteria

Criteria	Include Subordinates	Action Group
All employees in Position: Chief Operating Officer	<input type="checkbox"/>	Member
All employees in Position: Chief Nursing Officer	<input type="checkbox"/>	Member
All employees in Position: Associate Director for Management and Chief Financial ...	<input type="checkbox"/>	Member
All employees in Position: Deputy Chief of Staff	<input type="checkbox"/>	Member
All employees in Group: All Managers	<input type="checkbox"/>	Member

☐ Overwrite availability changes for all of this topic's child topics.

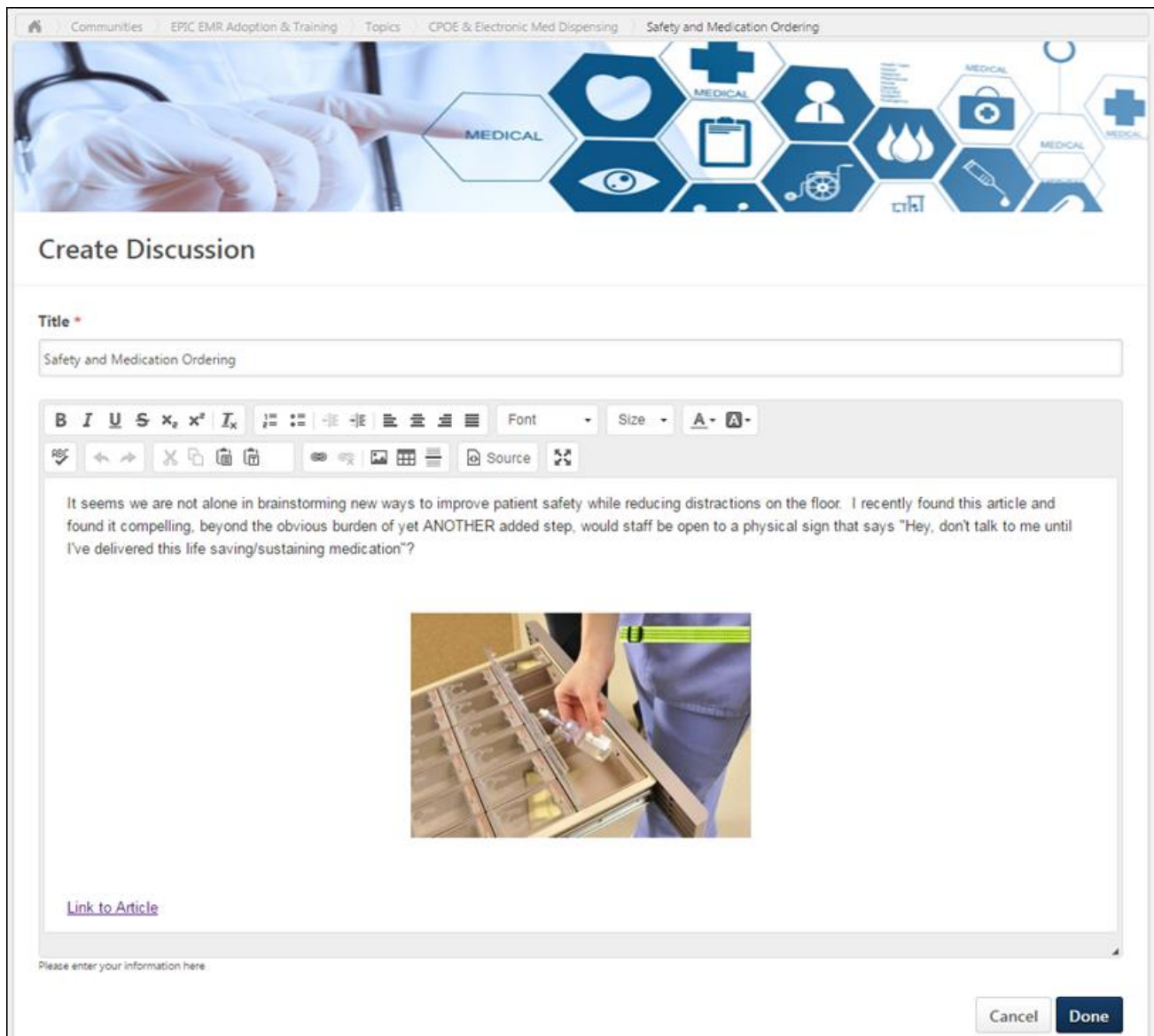
Cancel Done

Full Text Editor Overview

Prior to this enhancement, the text editor within Connect contained only basic formatting options. As a result, organizations often created their content in an external program with more robust formatting options and then upload the file to Connect. With this workflow, the content was difficult to update.

With this enhancement, a full text editor is now available within Connect when creating a posting which provides much more formatting functionality to help eliminate the need for additional tools. When editing the body of a posting, users can align text, change text font, update text size, add color to text, insert line breaks, embed links, tables, and images in a post, and paste content from Microsoft Word.

The full text editor is available when creating and editing any type of posting, including when creating a posting within a cohort community template.



The screenshot displays the 'Create Discussion' form within the Connect application. The top navigation bar includes links for Communities, EPIC EMR Adoption & Training, Topics, CPOE & Electronic Med Dispensing, and Safety and Medication Ordering. The main header features a banner with medical icons and the word 'MEDICAL'. The form itself has a 'Title' field containing 'Safety and Medication Ordering'. Below the title is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and image. The editor's content area contains the following text: 'It seems we are not alone in brainstorming new ways to improve patient safety while reducing distractions on the floor. I recently found this article and found it compelling, beyond the obvious burden of yet ANOTHER added step, would staff be open to a physical sign that says "Hey, don't talk to me until I've delivered this life saving/sustaining medication"?'. Below the text is an embedded image of a person in scrubs using a syringe to fill a multi-compartment medication tray. At the bottom of the editor, there is a 'Link to Article' text and a placeholder 'Please enter your information here'. The form concludes with 'Cancel' and 'Done' buttons.

Use Cases

Edward works in the Quality Assurance department at a tech company. Nobody in the company has more domain knowledge than Edward about email functionality in the application.

With newer members on the team like Mohsen and Abhi, Edward has decided to write an email guide for them and other future team members. Edward creates a beautiful posting in which he maximizes the entire text editor, uses tables and images for each step of email setup, and inserts hyperlinks to his sources.

Considerations

The character limit for the posting body is unchanged. This limit is 3,000 characters.

The full text editor is not available in the following areas:

- Replying to a posting
- Posting to the Live Feed
- Posting to the Team Feed
- Posting to the Community Feed
- Editing the community description
- Editing the topic description

Implementation

This functionality is automatically enabled for all organizations using New Connect.

Security

The following existing permission applies to this functionality:

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

Core

Add User Type and Employment Status

Add User Type and Employment Statuses

With this enhancement, organizations now have the ability to capture, store, and report on user type, employment status, leave, and termination information.

The user interface is extended to support new fields: user type, employment status, leave, and termination information. These fields can be configured in new sections of the User Preferences page and will appear on the User Record in a new User Status Information section.

This feature adds the ability to designate user types for users in the system, as well as designate workers within the employment life-cycle (onboarding through termination). Additionally, when users are terminated, the system can now capture the reasons for termination.

See the following enhancements for additional information:

- Data Load Wizard Support User Type and Statuses
- Custom Report User Types and Employment Statuses
- Onboarding Support User Types and Employment Statuses

Use Cases

1. Sarah is an employee at Acme Corp., and she decides that she is fed up with her manager.
2. Sarah takes a job at another organization.
3. When she notifies Acme Corp. and tells HR, the HR administrator can capture the voluntary turnover, as well as the reason Sarah is leaving the Company.

Considerations

There are limits on the ability to configure user types, statuses, leave reasons, and termination reasons. Cornerstone will evaluate expanding system-defined categories across all fields based on client feedback.

User types and statuses are now referenced a number of places across the application, including data loads, the user record, onboarding, and reporting, but it is not included everywhere. Areas that do not include user types and statuses include Groups, Security, Forms, and Standard Reports. Cornerstone will continue to evaluate adding references to user type and status based on client feedback.

Implementation

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.

When this functionality is enabled, the following permissions are automatically added to the default System Administrator security role:

- User Preferences - Leave Types: Manage

- User Preferences - Termination Reasons: Manage
- User Preferences - User Statuses: Manage
- User Preferences - User Types and Subtypes: Manage
- Users - Edit Users Type and Status
- Users - View Users Type and Status

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Leave Types: Manage	Grants ability to manage Leave Types on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Termination Reasons: Manage	Grants ability to manage Termination Reasons on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Statuses: Manage	Grants ability to manage User Statuses on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Types and Subtypes: Manage	Grants ability to manage User Types and Subtypes on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
Users - Edit Users Type and Status	Enables administrator to view and modify the type and status information for a user via the User Record. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration
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The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
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 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
Users - View Modification Details	Grants ability to view the Modification Details section on the User Record and view User Audits fields when creating a User custom report. This permission only works when used in conjunction with the Users - View and Users - Edit permissions. This is an administrator permission.	Core Administration
Users - View	Grants ability to search for and view summary information about users in the portal, via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.	Core Administration

User Preferences

With this enhancement, the following new sections may now be available on the User Preferences page:

- User Types
- User Subtypes
- User Statuses
- Termination Reasons
- On Leave Types

The availability of these sections is controlled by backend settings.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**. Select the arrow ➤ to the right of a section name to expand the section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Leave Types: Manage	Grants ability to manage Leave Types on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Reasons for Change: Manage	Grants ability to define and configure Reasons for Change on the User Preferences administrator page, which may be used when modifying the user record. The administrator must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Termination Reasons: Manage	Grants ability to manage Termination Reasons on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User	Core Administration

	Preferences page. This permission cannot be constrained. This is an administrator permission.	
User Preferences - User Statuses: Manage	Grants ability to manage User Statuses on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Types and Subtypes: Manage	Grants ability to manage User Types and Subtypes on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Tools > Core Functions > Core Preferences > User Preferences

User Preferences

Manage Preferences for the User Record

- REASON FOR CHANGE >
- USER TYPES >
- USER SUBTYPES (FOR USER TYPES CATEGORIES OF EMPLOYEE, CONTRACTOR, TEMPORARY AND INTERN) >
- USER STATUSES >
- TERMINATION REASONS >
- ON LEAVE TYPES >

Done

User Preferences - User Types

User types enable organizations to designate different types of workers within their organization. All user types are pre-defined with default names and categories so that specific functionality can be associated with user types within the system. Additional user types cannot be created. Although the system uses pre-defined user types, administrators can configure the user type names to match their organization's terminology.

The availability of this section is controlled by a backend setting. In addition, the User Types section is only available to administrators who have permission to manage user types and subtypes within User Preferences.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**. Select the arrow > to the right of a section name to expand the section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Types and Subtypes: Manage	Grants ability to manage User Types and Subtypes on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Default User Types

The following default user types are available:

- Employee
- Temporary
- Intern
- Contractor
- Consumer
- External User
- Unspecified

User Type Table

The following information is displayed for each user type:

- User Type - User types are sorted alphabetically. If the type name has been modified, then the modified type name is displayed in this column. This is the type name that is displayed on the User Record.
- User Type Category - This displays the system-defined category that cannot be modified.
- Active - When a user type is active, it can be selected when creating or editing a user. If a user type is deactivated, the user type continues to be associated with the user. However, inactive user types cannot be selected when creating or editing a user.

The following option may be available from the Options drop-down menu:

- Edit - Select this option to edit the user type. [See User Preferences - User Type - Edit on page 113 for additional information.](#)

USER TYPES ▼			
Configure the user types that can be selected.			
User Type ↕	User Type Category ↕	Active	Options
Consumer	Consumer	Yes	▼
Contractor	Contractor	Yes	▼
Employee	Employee	Yes	▼
External User	External User	Yes	▼
Intern	Intern	Yes	▼
Temporary	Temporary	Yes	▼
Unspecified	Unspecified	Yes	▼

User Preferences - User Type - Edit

User types enable organizations to designate different types of workers within their organization. All user types are pre-defined with default names and categories so that specific functionality can be associated with user types within the system. Additional user types cannot be created. Although the system uses pre-defined user types, administrators can configure the user type names to match their organization's terminology.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**.

- To edit a user type, select **Edit** from the **Options** drop-down menu.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Types and Subtypes: Manage	Grants ability to manage User Types and Subtypes on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Enter the following information for the user type:

- **User Type** - Enter the user type name, up to 100 characters. This should clearly describe the type of users who are associated with the user type. This is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **User Type Category** - This displays the system-defined category for the user type. This value cannot be modified.
- **Active** - When a user type is active, it can be selected when creating or editing a user. If a user type is deactivated, the user type continues to be associated with the user. However, inactive user types cannot be selected when creating or editing a user.
 - **Note:** *The Unspecified user type cannot be set as inactive.*


Save or Cancel

Click **SAVE** to save the user type and return to the User Preferences page. Or, click **CANCEL** to discard any unsaved changes.

Edit User Type

New user types cannot be created. Editing the display text will impact all places where the User Type is displayed.

User Type *



User Type Category

Consumer

☒ Active

CancelSave

User Preferences - User Subtypes

User types enable organizations to designate different types of workers within their organization. All user types are pre-defined with default names and categories so that specific functionality can be associated with user types within the system. Additional user types cannot be created. Although the system uses pre-defined user types, administrators can configure the user type names to match their organization's terminology.

For Employee, Contractor, Temporary, and Intern user types, administrators can create subtypes. This enables organizations to further designate different types of workers within their organization.

The availability of this section is controlled by a backend setting. In addition, the User Subtypes section is only available to administrators who have permission to manage user types and subtypes within User Preferences.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**. Select the arrow ➤ to the right of a section name to expand the section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Types and Subtypes: Manage	Grants ability to manage User Types and Subtypes on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

User Subtype - Add

To add a new user subtype, click the **ADD** button. This opens the Add User Subtype pop-up. See **User Preferences - User Subtype - Add/Edit** on page 117 for additional information.

User Subtype Table

The following information is displayed for each user subtype:

- User Subtype - User subtypes are sorted alphabetically. If the subtype name has been modified, then the modified subtype name is displayed in this column. This is the subtype name that is displayed on the User Record.

- User Subtype Category - This displays the system-defined category that cannot be modified.
- Active - When a user type is active, it can be selected when creating or editing a user. If a user type is deactivated, the user type continues to be associated with the user. However, inactive user types cannot be selected when creating or editing a user.

The following options may be available from the Options drop-down menu:

- Edit - Select this option to edit the user subtype. **See User Preferences - User Subtype - Add/Edit** on page 117 *for additional information*.
- Delete - Select this option to delete the subtype. This option is not available if the subtype has been associated with a user. A confirmation pop-up opens to confirm the deletion.

USER SUBTYPES (FOR USER TYPES CATEGORIES OF EMPLOYEE, CONTRACTOR, TEMPORARY AND INTERN) ▼			
When a user is indicated as a user type category of Employee, Contractor, Temporary, or Intern, and at least one subtype is defined and active, the field will be required. Once subtypes are selected on a user record, there is no ability to modify the User Type Category or to delete the Subtype.			
Add			
User Subtype ⚙	User Type Category ⚙	Active	Options
Annual	Contractor	Yes	▼
Monthly	Contractor	Yes	▼
Quarterly	Contractor	Yes	▼

User Preferences - User Subtype - Add/Edit

User types enable organizations to designate different types of workers within their organization. All user types are pre-defined with default names and categories so that specific functionality can be associated with user types within the system. Additional user types cannot be created. Although the system uses pre-defined user types, administrators can configure the user type names to match their organization's terminology.

For Employee, Contractor, Temporary, and Intern user types, administrators can create subtypes. This enables organizations to further designate different types of workers within their organization.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**.

- To create a new user subtype, click the **ADD** button in the *User Subtypes* section. This opens the Add User Subtype pop-up.
- To edit a user subtype, select **Edit** from the **Options** drop-down menu.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Types and Subtypes: Manage	Grants ability to manage User Types and Subtypes on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

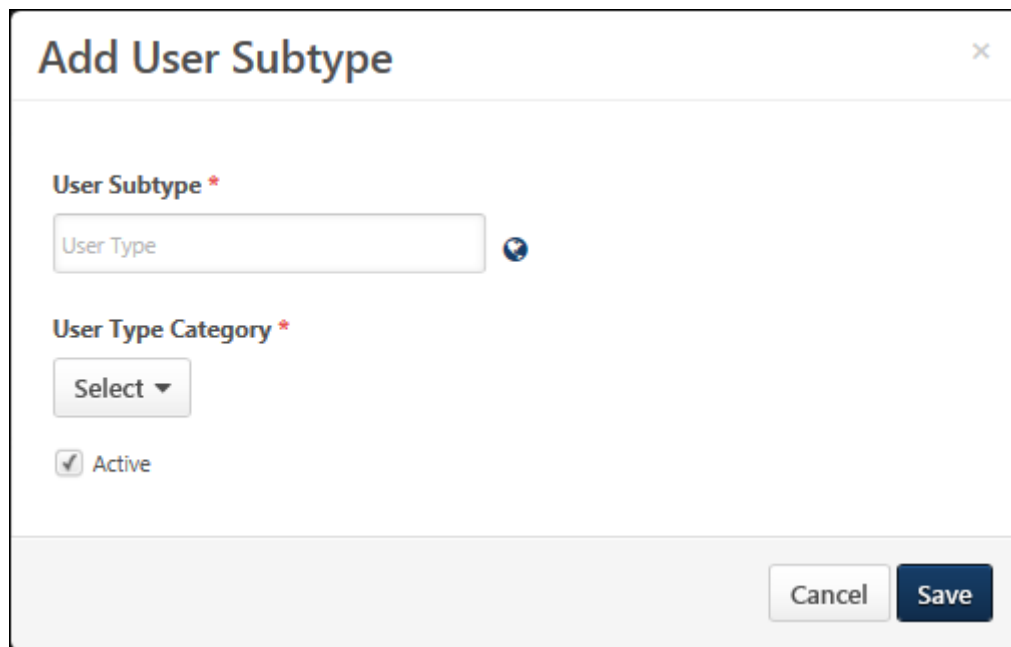
Enter the following information for the user subtype:

- **User Subtype** - Enter the user subtype name, up to 100 characters. This should clearly describe the type of users who are associated with the user subtype. This is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **User Type Category** - From the drop-down, select the type associated with the subtype. For example, select Contractor when creating a contractor subtype. If the subtype has been associated with a user, then this field can no longer be modified. The ability to create a user subtype is only available for the following user types: Employee, Contractor, Temporary, and Intern.

- **Active** - When a user type is active, it can be selected when creating or editing a user. If a user type is deactivated, the user type continues to be associated with the user. However, inactive user types cannot be selected when creating or editing a user.

Save or Cancel

Click **SAVE** to save the user subtype and return to the User Preferences page. Or, click **CANCEL** to discard any unsaved changes.



The image shows a modal dialog box titled "Add User Subtype" with a close button (X) in the top right corner. The dialog contains two required fields, each marked with a red asterisk (*). The first field, "User Subtype", is a text input with the placeholder text "User Type" and a small globe icon to its right. The second field, "User Type Category", is a dropdown menu with the text "Select" and a downward arrow. Below these fields is a checkbox labeled "Active" which is currently checked. At the bottom right of the dialog are two buttons: "Cancel" and "Save".

User Preferences - User Statuses

User statuses enable organizations to track an employee through different employment life-cycle statuses. All user statuses are pre-defined with default names and categories so that specific functionality can be associated with user statuses within the system. Additional user statuses cannot be created. Although the system uses pre-defined user statuses, administrators can configure the user status names to match their organization's terminology.

User statuses can only be selected for a user when their user type is set to Employee, Temporary, Intern, or Contractor.

The availability of this section is controlled by a backend setting. In addition, the User Statuses section is only available to administrators who have permission to manage user statuses within User Preferences.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**. Select the arrow ➤ to the right of a section name to expand the section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Statuses: Manage	Grants ability to manage User Statuses on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Default User Statuses

The following default user statuses are available:

- Onboarding
- Working
- On Leave
- Terminated

User Status Table

The following information is displayed for each user status:

- User Status - User statuses are sorted alphabetically. If the status name has been modified, then the modified status name is displayed in this column. This is the status name that is displayed on the User Record.
- User Status Category - This displays the system-defined category that cannot be modified.
- Active - When a user status is active, it can be selected when creating or editing a user. If a user status is deactivated, the user status continues to be associated with the user. However, inactive user statuses cannot be selected when creating or editing a user.

The following option may be available from the Options drop-down menu:

- Edit - Select this option to edit the user status. [See User Preferences - User Status - Edit on page 121](#) *for additional information.*

USER STATUSES ▼			
Configure User Statuses. User statuses can only be selected for users when they are set to a User Type Category of Employee, Temporary, Intern, and Contractor.			
User Status	Status Category	Active	Options
Onboarding	Onboarding	Yes	▼
Working	Working	Yes	▼
On Leave	On Leave	Yes	▼
Terminated	Terminated	Yes	▼

User Preferences - User Status - Edit

User statuses enable organizations to track an employee through different employment life-cycle statuses. All user statuses are pre-defined with default names and categories so that specific functionality can be associated with user statuses within the system. Additional user statuses cannot be created. Although the system uses pre-defined user statuses, administrators can configure the user status names to match their organization's terminology.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**.

- To edit a user status, select **Edit** from the **Options** drop-down menu.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - User Statuses: Manage	Grants ability to manage User Statuses on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Enter the following information for the user status:

- User Status** - Enter the user status name, up to 100 characters. This should clearly describe the employment life-cycle status associated with the user status. This is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- Status Category** - This displays the system-defined category for the user status. This value cannot be modified.
- Active** - When a user status is active, it can be selected when creating or editing a user. If a user status is deactivated, the user status continues to be associated with the user. However, inactive user statuses cannot be selected when creating or editing a user.


Save or Cancel

Click **SAVE** to save the user status and return to the User Preferences page. Or, click **CANCEL** to discard any unsaved changes.

Edit User Status ✕

New user statuses cannot be created. Editing the display text will impact all places where the User Status is displayed.

User Status *



Status Category

Onboarding

☒ Active

Cancel Save

User Preferences - On Leave Types

On leave types enable organizations to track when employees are excused from work or duty and the reason for their leave. All leave types are pre-defined with default names and categories so that specific functionality can be associated with on leave types within the system. Although the system uses pre-defined on leave types, administrators can configure the on leave type names to match their organization's terminology.

Leave types can only be selected for a user when their user status is set to On Leave.

The availability of this section is controlled by a backend setting. In addition, the On Leave Types section is only available to administrators who have permission to manage leave types within User Preferences.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**. Select the arrow ➤ to the right of a section name to expand the section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Leave Types: Manage	Grants ability to manage Leave Types on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

On Leave Type - Add

To add a new on leave type, click the **ADD** button. This opens the Add On Leave Type pop-up. See **User Preferences - On Leave Type - Add/Edit** on page 125 for additional information.

Default On Leave Types

The following default on leave types are available:

- Sabbatical
- Parental
- Medical
- Compassionate
- Force Majeure
- Military

- Jury Service
- Education
- Administrative
- Suspension
- Disability
- Temporary commission

On Leave Type Table

The following information is displayed for each on leave type:

- On Leave Type - On leave types are sorted alphabetically. If the type name has been modified, then the modified type name is displayed in this column. This is the on leave type name that is displayed on the User Record.
- Leave Type Category - This displays the system-defined category that cannot be modified.
- Active - When an on leave type is active, it can be selected when creating or editing a user. If an on leave type is deactivated, the on leave type continues to be associated with the user. However, inactive on leave types cannot be selected when creating or editing a user.

The following options may be available from the Options drop-down menu:

- Edit - Select this option to edit the on leave type. [See User Preferences - On Leave Type - Add/Edit](#) on page 125 *for additional information*.
- Delete - Select this option to delete the on leave type. This option is not available if the on leave type has been associated with a user. A confirmation pop-up opens to confirm the deletion.

ON LEAVE TYPES			
Configure On Leave Types. Leave Types can only be selected for users when they are set to a Status Category of On Leave. Once On Leave Types are selected on a user record, there is no ability to modify the On Leave Type Category or to delete the On Leave Type. Add			
On Leave Type	Leave Type Category	Active	Options
Administrative	Administrative	Yes	▼
Compassionate	Compassionate	Yes	▼
Disability	Disability	Yes	▼
Education	Education	Yes	▼
Force Majeure	Force Majeure	Yes	▼
Jury Service	Jury Service	Yes	▼
Medical	Medical	Yes	▼
Military	Military	Yes	▼
Parental	Parental	Yes	▼
Sabbatical	Sabbatical	Yes	▼
Suspension	Suspension	Yes	▼
Temporary commission	Temporary commission	Yes	▼

User Preferences - On Leave Type - Add/Edit

On leave types enable organizations to track when employees are excused from work or duty and the reason for their leave. All leave types are pre-defined with default names and categories so that specific functionality can be associated with on leave types within the system. Although the system uses pre-defined on leave types, administrators can configure the on leave type names to match their organization's terminology.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**.

- To create a new on leave type, click the **ADD** button in the *On Leave Type* section. This opens the Add On Leave Type pop-up.
- To edit an on leave type, select **Edit** from the **Options** drop-down menu.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Leave Types: Manage	Grants ability to manage Leave Types on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Enter the following information for the on leave type:

- **On Leave Type** - Enter the on leave type name, up to 40 characters. This should clearly describe the general reason associated with the type of leave. This is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **Leave Type Category** - From the drop-down, select the type associated with the new on leave type. Only a default leave type can be selected. For example, organizations may create a Maternal leave type and a Paternal leave type, and both of these leave types should be associated with the Parental leave type. If the on leave type has been associated with a user, then this field can no longer be modified.
- **Active** - When an on leave type is active, it can be selected when creating or editing a user. If an on leave type is deactivated, the on leave type continues to be associated with the user. However, inactive on leave types cannot be selected when creating or editing a user.


Save or Cancel

Click **SAVE** to save the on leave type and return to the User Preferences page. Or, click **CANCEL** to discard any unsaved changes.

×

Add On Leave Type

On Leave Type *



Leave Type Category *

Select ▼

☒ Active

Cancel

Save

User Preferences - Termination Reasons

Termination reasons enable organizations to track the reasons why employees are terminated, including whether the employee left the organization voluntarily or involuntarily. Termination reasons are pre-defined with default names and categories so that specific functionality can be associated with termination reasons within the system. Although the system uses pre-defined termination reasons, administrators can configure the termination reason names to match their organization's terminology.

Termination reasons can only be selected for a user when their user status is set to Terminated.

The availability of this section is controlled by a backend setting. In addition, the Termination Reasons section is only available to administrators who have permission to manage termination reasons within User Preferences.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**. Select the arrow ➤ to the right of a section name to expand the section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Termination Reasons: Manage	Grants ability to manage Termination Reasons on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Termination Reason - Add

To add a new termination reason, click the **ADD** button. This opens the Add Termination Reason pop-up. See **User Preferences - Termination Reason - Add/Edit** on page 130 for additional information.

Default Involuntary Termination Reasons

The following involuntary termination reasons are available:

- Reduction in force/Layoff
- Redundancy
- Offshoring
- Unsatisfactory performance

- Policy violation
- Forced retirement
- Poor attendance
- Negligence
- Dishonesty/Falsification/Theft
- Conviction of a Crime
- End of Contract
- End of casual employment
- Transfer

Default Voluntary Termination Reasons

The following voluntary termination reasons are available:

- Better Opportunity
- Career Change
- Retired
- Deceased
- Manager dissatisfaction
- Work Location
- Work Schedule
- Lack of Training/Development
- Lack of Career Growth
- Employee-job fit
- Company leadership
- Inadequate Compensation
- Inadequate Benefits
- Transfer
- Education
- Medical
- Move/relocation
- Job abandonment
- Declined offer
- Legally ineligible
- Fail to return from leave

Termination Reason Table

The following information is displayed for each termination reason:

- Termination Reason - Termination reasons are sorted alphabetically. If the reason name has been modified, then the modified reason name is displayed in this column. This is the termination reason name that is displayed on the User Record.
- Termination Reason Category - This displays the system-defined category that cannot be modified.

- Active - When a termination reason is active, it can be selected when creating or editing a user. If a termination reason is deactivated, the termination reason continues to be associated with the user. However, inactive termination reasons cannot be selected when creating or editing a user.

The following options may be available from the Options drop-down menu:

- Edit - Select this option to edit the termination reason. **See User Preferences - Termination Reason - Add/Edit** on page 130 *for additional information*.
- Delete - Select this option to delete the termination reason. This option is not available if the termination reason has been associated with a user. A confirmation pop-up opens to confirm the deletion.

TERMINATION REASONS ▼				
Configure Termination Reasons. Termination Reasons can only be selected for users when they are set to a Status Category of Terminated. Once termination reasons are selected on a user record, there is no ability to modify the Termination Reason Category or to delete the Termination Reason. Add				
Termination Reason ⌵	Termination Reason Category ⌵	Type	Active	Options
Better Opportunity	Better Opportunity	Voluntary	Yes	▼
Career Change	Career Change	Voluntary	Yes	▼
Company leadership	Company leadership	Voluntary	Yes	▼
Conviction of a Crime	Conviction of a Crime	Involuntary	Yes	▼
Deceased	Deceased	Involuntary	Yes	▼
Declined offer	Declined offer	Voluntary	Yes	▼
Dishonesty/Falsification/Theft	Dishonesty/Falsification/Theft	Involuntary	Yes	▼
Education	Education	Voluntary	Yes	▼
Employee-job fit	Employee-job fit	Voluntary	Yes	▼
End of casual employment	End of casual employment	Involuntary	Yes	▼
End of Contract	End of Contract	Involuntary	Yes	▼

User Preferences - Termination Reason - Add/Edit

Termination reasons enable organizations to track the reasons why employees are terminated, including whether the employee left the organization voluntarily or involuntarily. Termination reasons are pre-defined with default names and categories so that specific functionality can be associated with termination reasons within the system. Although the system uses pre-defined termination reasons, administrators can configure the termination reason names to match their organization's terminology.

To access the User Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > USER PREFERENCES**.

- To create a new termination reason, click the **ADD** button in the *Termination Reasons* section. This opens the Add Termination Reason pop-up.
- To edit a termination reason, select **Edit** from the **Options** drop-down menu.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Core Information: View	Grants ability to view the User Preferences administrator page. This permission does not allow administrators to modify the preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Preferences - Termination Reasons: Manage	Grants ability to manage Termination Reasons on the User Preferences administrator page. Administrators must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

Enter the following information for the termination reason:

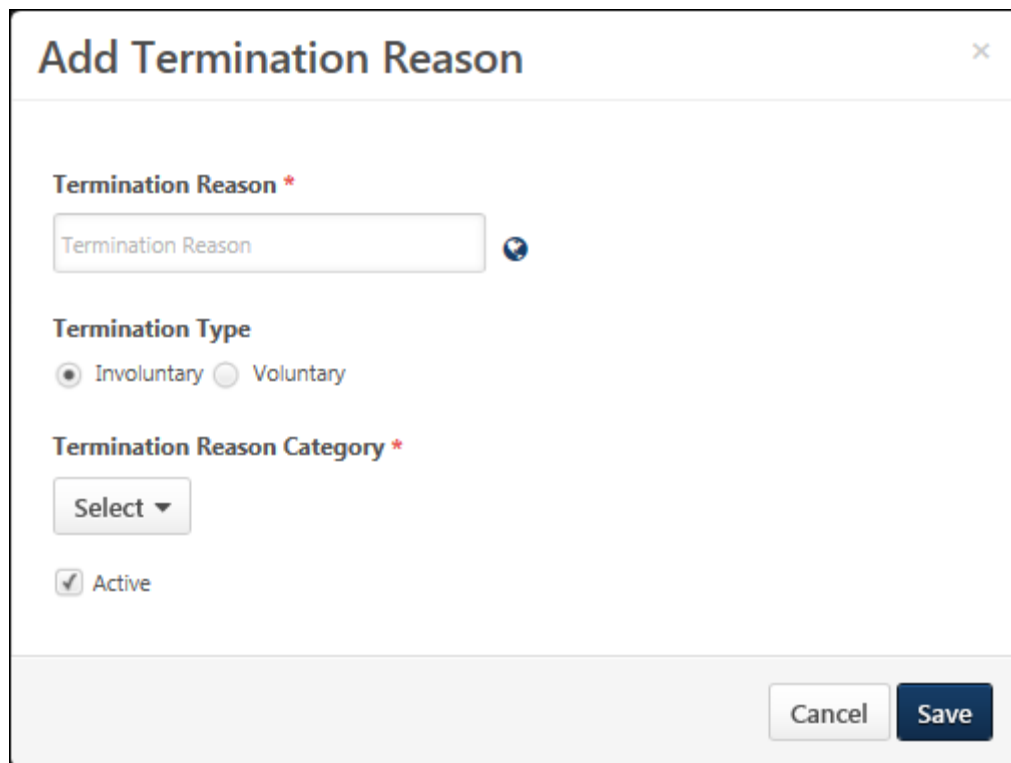
- **Termination Reason** - Enter the termination reason name, up to 100 characters. This should clearly describe the general reason associated with termination. This is required. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.
- **Termination Type** - Select whether the termination reason is voluntary or involuntary. If the termination reason has been associated with a user, then this field can no longer be modified. This selection determines which options are available in the **Termination Reason Category** field.
 - Voluntary indicates that the employee chose to leave their position.
 - Involuntary indicates that the organization forced the employee to leave their position.
- **Termination Reason Category** - From the drop-down, select the general reason associated with the new termination reason. The **Termination Type** selection

determines which options are available. For example, if Voluntary is selected, then only Voluntary termination reason categories are available. Only a default termination reason can be selected. For example, organizations may create multiple types of negligence termination reasons, and these termination reasons should be associated with the Negligence termination reason category. If the termination reason has been associated with a user, then this field can no longer be modified.

- **Active** - When a termination reason is active, it can be selected when creating or editing a user. If a termination reason is deactivated, the termination reason continues to be associated with the user. However, inactive termination reasons cannot be selected when creating or editing a user.

Save or Cancel

Click **SAVE** to save the termination reason and return to the User Preferences page. Or, click **CANCEL** to discard any unsaved changes.



The screenshot shows a web form titled "Add Termination Reason" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Termination Reason ***: A text input field with the placeholder text "Termination Reason" and a small globe icon to its right.
- Termination Type**: Two radio buttons labeled "Involuntary" (selected) and "Voluntary".
- Termination Reason Category ***: A dropdown menu with the text "Select" and a downward arrow.
- Active**: A checkbox that is checked, with the label "Active" next to it.
- Buttons**: At the bottom right, there are two buttons: "Cancel" and "Save".

User Record - User Status Information

With this enhancement, a new *User Status Information* section is added to the User Record page. The *User Status Information* section enables administrators to set the user type (e.g., Employee, Intern, Contractor), user status (e.g., Working, On Leave, Terminated), and provide additional information regarding the user's status.

The *User Status Information* is only available to administrators who have permission to view or edit User Type and Status.

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 - Edit Users Type and Status	Enables administrator to view and modify the type and status information for a user via the User Record. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	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
Users - View	Grants ability to view user type and status information on	Core

Users Type and Status	the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Administration
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The following options may appear in the *User Status Information* section:

- **User Type** - Select the user's type, such as Employee, Intern, or Contractor.
- **User Subtype** - Select the subtype that applies to the user. This option is only available if the **User Type** is set to Employee, Contractor, Intern, or Temporary and if at least one subtype is defined for the selected type. If this field is available, then it is required.
- **User Status** - Select the user's employment life-cycle status, such as Working, On Leave, or Terminated. This option is only available if a value is set for the **User Type** field. This field is required when a user's User Type Category is Employee, Intern, Contractor, or Temporary.
- **Leave Type** - Select the type of leave the user is currently on, such as Medical, Sabbatical, or Parental. This option is only available if the **User Type** is set to On Leave. This field is required when a user's User Status Category is On Leave.
- **Termination Date** - Select the date on which the user's employment was terminated. This option is only available if the **User Type** is set to Terminated.
- **Termination Type** - Select whether the employee chose to leave their position (i.e., voluntary termination) or the organization forced the employee to leave their position (i.e., involuntary termination). This option is only available if the **User Type** is set to Terminated. The default value for this field is Voluntary, and this field is required when the user's User Status Category is Terminated.
- **Eligible for Rehire** - Select whether the employee is eligible to be employed with the organization in the future. This option is only available if the **User Type** is set to Terminated.
- **Termination Reason** - Select the reason why the employee is no longer working for the organization, such as Retired, End of Contract, or Transfer. If the **Termination Type** is set to Voluntary, then only voluntary termination reasons are available. If the **Termination Type** is set to Involuntary, then only involuntary termination reasons are available. This option is only available if the **User Type** is set to Terminated. This field is required when a user's User Status Category is Terminated.

The options for each field are defined in User Preferences. [See User Preferences](#) on page 109 *for additional information*.

The screenshot shows a form titled "User Status Information" with four dropdown menus arranged in a 2x2 grid. Each dropdown menu has a red asterisk next to it, indicating it is a required field. The values selected in the dropdowns are: User Type: Contractor, User Subtype: Quarterly, User Status: On Leave, and Leave Type: Medical.

User Status Information	
User Type: Contractor	User Subtype: Quarterly *
User Status: On Leave *	Leave Type: Medical *

Auditing and Effective Dating for User Type & Employment Statuses

With the introduction of the ability to capture, store, and report on user information (user types, statuses, leave reasons, and termination reasons), Link clients can now audit and effective date the following fields:

- User Type
- User Subtype
- User Status
- Leave Type
- Termination Type
- Eligible for Rehire
- Termination Reason

Implementation

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.

This functionality only applies to organizations that are using Link and have User Types and Employment Statuses enabled.

Data Load Wizard - Link Historical Effective Dated User Data

With this enhancement, organizations can load multiple effective dated records for each user in a single load. This streamlines the ability to migrate user data from a legacy system into Cornerstone.

This is a continuation of the April 2016 enhancement which gave the ability for organizations to execute a data load of point-in-time effective dated information about their users, such as a historical effective dated data load. This feature, giving the ability to have multiple effective dated records for each user in a single load, enhances this functionality.

Use Cases

1. Acme Corp. is deprecating an existing HR system that has employee data about the organization for the previous eight years.
2. Jeremy is an administrator at Acme Corp., and he is working migrating data from the HR system to the Cornerstone system.
3. Jeremy exports the data from his legacy HR system using the reporting tool and formats the data to be loaded into the Cornerstone system.
4. With this enhancement, Jeremy can include all eight years of data for his employees in a single load, meaning that it is much easier for him to migrate data from the legacy system into Cornerstone.

Considerations

Users cannot be created in the system "as of" a point in time; users can only be created "as of" Right Now. Thus, to perform a data load of effective dated information, the users must already exist in the Cornerstone system.

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.

Backdating user data before 1901 is not supported.

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 permission applies to this functionality:

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

Users	templates. This is an administrator permission.	
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Data Load Wizard Support User Types and Employment Statuses

With this release, organizations now have the ability to capture, store, and report on user type, employment status, leave, and termination information.

The Data Load Wizard Platform User Load and Feed now support the following fields:

- User Type
- User Subtype
- User Status
- On Leave Type
- Termination Date
- Termination Type
- Eligible for Rehire
- Termination Reason

See the following enhancements for additional information:

- Add User Type and Employment Statuses
- Custom Report User Types and Employment Statuses
- Onboarding Support User Types and Employment Statuses

Implementation

This functionality only applies to organizations that are using Link and the Data Load Wizard.

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.

Security

The following existing permission applies 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

End of IE8 Support in February 2017

In order to keep up with browser security requirements and the latest software enhancements, Cornerstone will discontinue support for Microsoft Internet Explorer 8 in February 2017. Please reach out to your IT department and make plans to convert to one of the compatible browsers prior to the February 2017 release.

Insights - Career Mobility

Manager Self Service Employee Relationships

Manager Self Service Employee Relationships

With this enhancement, employee relationship fields can now be added to forms, and users can modify the fields using forms. This enables managers and other users to update a user's employee relationship information without the intervention from administrators for events such as promotions or internal transfers. As a result, organizations can implement this functionality to reduce the impact on administrators and allow for more timely updates to user information.

Use Cases

1. Kim is the Vice President of Human Resources at Acme Corp. Britton is one of her direct reports, and he is transferring to the Marketing department.
2. Kim launches an internal transfer form and completes the information on behalf of Britton.
3. One of the fields on the form is the Manager field. Kim selects Britton's new manager in the Marketing department.
4. Kim submits the form, and the changes take effect for Britton's internal transfer.

Considerations

For forms that have an approval workflow, changes made to the employee relationship are not applied to the system until the form is approved.

Employee relationship information is not available via Onboarding custom reports.

Implementation

This functionality is automatically enabled for all organizations using Forms functionality.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Forms - Manage	<p>Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission.</p> <p>Note: <i>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.</i></p>	Forms Management Administration
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	Core

	permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User Subordinates. This is an end user permission.	
Form Self-Service - Manage	Grants access to manage Form Self Service and Self-Service Submissions within Manage Forms. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Administration

Create Form - Employee Relationships

With this enhancement, administrators can now add employee relationship fields to a form. This enables an employee to view and update their employee relationships using a form.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Forms - Manage	Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. Note: <i>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.</i>	Forms Management Administration
Form Self-Service - Manage	Grants access to manage Form Self Service and Self-Service Submissions within Manage Forms. This permission can be constrained by OU and User's OU. This is an administrator permission.	Forms Administration

Employee Relationships

Employee relationship fields control which users are assigned to a particular role for a user. For example, the Manager employee relationship field controls who is assigned as a user's manager. If an employee relationship field is modified, then the corresponding field on the user's User Record is also updated.

Depending on the configuration of the employee relationship field, these fields can be added to a form to display a read-only view of the employee relationship or allow a user to update the employee relationship.

The following employee relationship fields may be available, and they are displayed in alphabetical order:

- Approver
- Manager
- Custom Relationships

Only active employee relationships are available. If an employee relationship is made inactive, the corresponding field remains on the form until it is removed from the form. At that point, the inactive field cannot be added to the form unless it is made active.

- When a user views a form, only active employee relationships are displayed. Any employee relationships that are inactive are not visible on the form.

As with other field types, administrators can set employee relationship fields as Required, Read-Only, or Auto-fill Response. In addition, the field can be deleted from the form and reordered within the form.

The screenshot shows the 'Create Form - Build' interface. On the left, the 'Available Fields' sidebar is expanded, showing categories like SYSTEM FIELDS, User Standard Fields, User Custom Fields, Organizational Units, and Employee Relationships. The main workspace displays a form titled 'Title'. It includes a 'Title' field, a 'Build' tab (selected), and fields for 'API Name' and 'Description'. A 'Generate' button is next to the 'API Name' field. Below these fields is a checkbox labeled 'Active'. A large dashed box contains the instruction: 'Drag and drop an Available Field here or click the plus icon on an Available Field to begin creating your form.' At the bottom right are buttons for 'Cancel', 'Save', and 'Save and Continue'.

Complete Form - Employee Relationships

With this enhancement, employee relationship fields may be included in a form. Depending on the configuration of the employee relationship field, the form may display a read-only view of the employee relationship or allow a user to update the employee relationship.

Users must have the Form Completion - View and Edit OU and Employee Relation Fields permission in order to view and edit employee relation fields within a form. When selecting a user for an employee relationship field, the constraints on this permission determine which users are available to select. If a user who does not have this permission launches a form, then any employee relationship fields that are included in the form are not available to the user.

When a user views a form, only active employee relationships are displayed. Any employee relationships that are inactive are not visible on the form.

As with other fields, employee relationship fields may be pre-populated with the name of the user who is currently set for the employee relationship field.

Per existing functionality, if any approvals or e-signatures are required for the form, then these must be completed before any data changes are committed to the system.

Note: *Changing an employee relationship via a form does not impact the approval workflow because the change to the employee relationship is not applied to the system until the approval workflow has been completed.*

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

Employee Position Change

Use this form when an employee is changing position. Please remember, this form will still follow the approval process before being finalized.

First Name *

Last Name *

Position *

Location

Manager

Approver

Reason for Change *

Select ▼

Cancel Submit For Approval

Publish Custom Charts to Dashboards

Publish Custom Charts to Dashboards Overview

With this enhancement, charts created in the Custom Report Builder can be published as custom dashboards and shared within your organization. You can leverage the powerful visualizations within the Custom Report Builder to build your own visuals and add them to dashboards.

Prior to this enhancement, custom charts could be used to visualize the custom report. However, there was no way to move those visualizations into a dashboard or to share the dashboard with other users.

Use Cases

An organization has an analyst who creates custom reports. The analyst publishes widgets and builds dashboards. She shares the dashboards with managers, executives, directors, etc., who are not power users of the Custom Report Builder.

The users with whom she shares the dashboards can create their own custom dashboards by adding the published widgets without having to build a custom report, chart, and dashboard themselves.

Considerations

When configuring the Publish tab for a custom report, a widget can only be shared with specific users, and the option to share the widget will not be clickable if shared with an organizational unit (OU).

Glossary

- **Custom Dashboard** - A custom dashboard is a dashboard that has one or more custom widgets.
- **Widget - Custom Reporting** - A widget within Custom Reporting is a report that has been published. Widgets and reports are always processed simultaneously.

Security

There are no new permissions with this enhancement. See the **Security Permissions** topic in Online Help for a detailed list of custom report permissions.

With this enhancement, the *Dashboard - View* permission is updated to indicate that users must also have permission to view the standard or custom reports that are included in any shared dashboards. The permission description will be updated upon implementation of this enhancement.

The following additional permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Dashboard - Create	Grants the ability to create a dashboard of one or more graphical standard reports that can be saved and refreshed at-will to update the results on an ongoing basis. User must also	Reports - Dashboards

	have permission for at least one of the standard reports that are designated for use in dashboards. If a user does not have permission to view a report type, the user cannot add that report type to the dashboard.	
Dashboard - Share	Grants the ability to share a dashboard created by self with other users within the portal who may then view and refresh the results of the dashboard at-will. This permission works in conjunction with the Create Dashboard permission.	Reports - Dashboards
Dashboard - View	Grants the ability to view dashboards created by self or shared by others. User must also have permission to view the standard or custom reports that are included in any shared dashboards. If a user does not have permission to view a report type, the user cannot view that report type within the dashboard. This is an end user permission.	Reports - Dashboards

Reports Page

With this enhancement, options are added to the reports filter on the main Reports page to enable sorting by published reports. The following options are added:

- **Published by Me** - Select this option to filter the list by reports that you have published. The name of the Last Run column changes to Last Published, which displays the most recent date on which the report/widget was run.
- **Published with Me** - Select this option to filter the list by published reports that have been shared with you. The name of the Last Run column changes to Last Published, which displays the most recent date on which the *report/widget was published*.

Reports

Click "All Folders" on the left to view all your reports. Click any folder to view reports within that folder. Right click a folder to view options for it. Drag and drop folders to change the tree. Use the New button to create a new folder or report. Drag and drop a report to a folder to move it to that folder. To view data for the last three runs of a report, click "History" in the Actions column. For the most recent data, click "Refresh" to process the report.

Folders

- ▾ All Folders
- ▾ Performance Review Report

Custom Report

Ran Anytime
Search

Title	Type	Creator	Last Run	Actions
Applicants & Requisiti...	Recruiting...	Moore, T...	014	▾
Avg Review Score By...	Performanc...	Config, S...	011	▾
Avg Review Score B...	Performa...	Lolley, J...	20...	▾
Avg Review Score By...	Performanc...	Config, SMP	Performance... 08/05/2011	▾
Current Applicant St...	Recruiting...	Moore, Tas...	All Folders 06/27/20...	▾
Performance Review Y...	Performanc...	Config, SMP	Performance... 08/05/2011	▾

All Reports

All Reports
Shared with Me
Created by Me
Published by Me
Published with Me

Delete Report with Published Widget

If a custom report that includes a published widget is deleted, then the widget is also deleted from the Published Widgets category for dashboards and any dashboard containing that widget. The widget is deleted for both the report creator and shared users.

Delete Chart

If the chart for a custom report is deleted in the report, then the widget is also deleted from the Published Widgets category for dashboards and any dashboard containing that widget. The widget is deleted for both the report creator and shared users.

Custom Report Builder - Publish Tab for Widgets

With this enhancement, a Publish tab is added to the Report Designer page. This tab allows you to publish a custom chart to dashboards.

Field Filters Requisition/OU Filters Sort Summary Sharing Schedule Delivery Chart Publish

☒ Publish as widget
☒ Share widget with users

Widget description: This widget shows the current applicant status across all job requisitions.

Pre-Steps for Publishing

In order to publish a chart, the chart must first be created on the Chart tab. In addition, in order to share the published widget with other users, you must first add at least one user on the Sharing tab, up to a maximum of 20 users. **Note:** *If you include organizational units (OU) on the Sharing tab, then the report cannot be scheduled.*

Publish as Widget

This option allows you to publish the chart to dashboards. The option is unchecked by default. Checking the box to enables the chart to be available for dashboards.

Best Practice for Adding Charts to Published Reports: *When you add a chart to a report that you would like to publish, the act of adding a chart will change the way the data is displayed in the report. Adding a chart summarizes the data in the report. Therefore, if you do not want the report to be summarized but want to add a chart and publish it, then it is a best practice to copy the report. This way, you can have a version of the report that is not published (and not summarized) and a version that is published.*

Widget Description

This option is only enabled when the **Publish as widget** box is checked. This field allows you to provide a description for the widget, up to 200 characters. When sharing the widget with other users, a description can help users know what information has been configured for the chart.

Share Widget with Users

Note: *This option is only enabled after at least one user has been added to the Sharing tab (up to a maximum of 20 users).*

This option is unchecked by default. Checking the box will share the widget with the users selected on the Sharing tab. Once the report is saved, the shared users will be able to add the widget to their dashboards. A widget can only be shared with specific users, and the checkbox will not be clickable if shared with an OU.

If you haven't shared the Custom Report with other users through the Sharing tab, the Share widget with users icon will be un-clickable. Once at least one user is added under the Sharing tab, the checkbox will be clickable.

You are not required to share the report and widget with other users if you plan on sharing a Dashboard with a user. The benefits of sharing a report and also the published widget is that any scheduled refresh will apply.

Sharing and scheduling still follow the existing limitation – a report (and thus widget) cannot be scheduled to refresh if it has been shared with more than 20 users. If you want to share a widget or dashboard with more than 20 users, you can share the report without a schedule, or you can share a dashboard you've created with the published widget.

Shared Widget Access

For shared users, they must have permission to view shared dashboards, as well as permission to view the specific custom report type from which the widget was published.

Scheduled Refresh

The scheduled refresh applies to shared widgets.

Edit Custom Report

When editing the custom report, the options on the Publish tab are editable by the report creator. Shared users cannot edit the report.

Copy Custom Report

When copying the custom report, the settings on the Publish tab are not copied.

Copy Custom Dashboard

Custom dashboards cannot be copied.

Dashboards - Add Published Widgets to Dashboard

With this enhancement, widgets that are published in the Custom Report Builder can be added to new and existing dashboards. A Published Widgets category is added to the New Widgets page to enable published widgets to be added.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Dashboard - Create	Grants the ability to create a dashboard of one or more graphical standard reports that can be saved and refreshed at-will to update the results on an ongoing basis. User must also have permission for at least one of the standard reports that are designated for use in dashboards. If a user does not have permission to view a report type, the user cannot add that report type to the dashboard.	Reports - Dashboards

Availability of Published Widgets

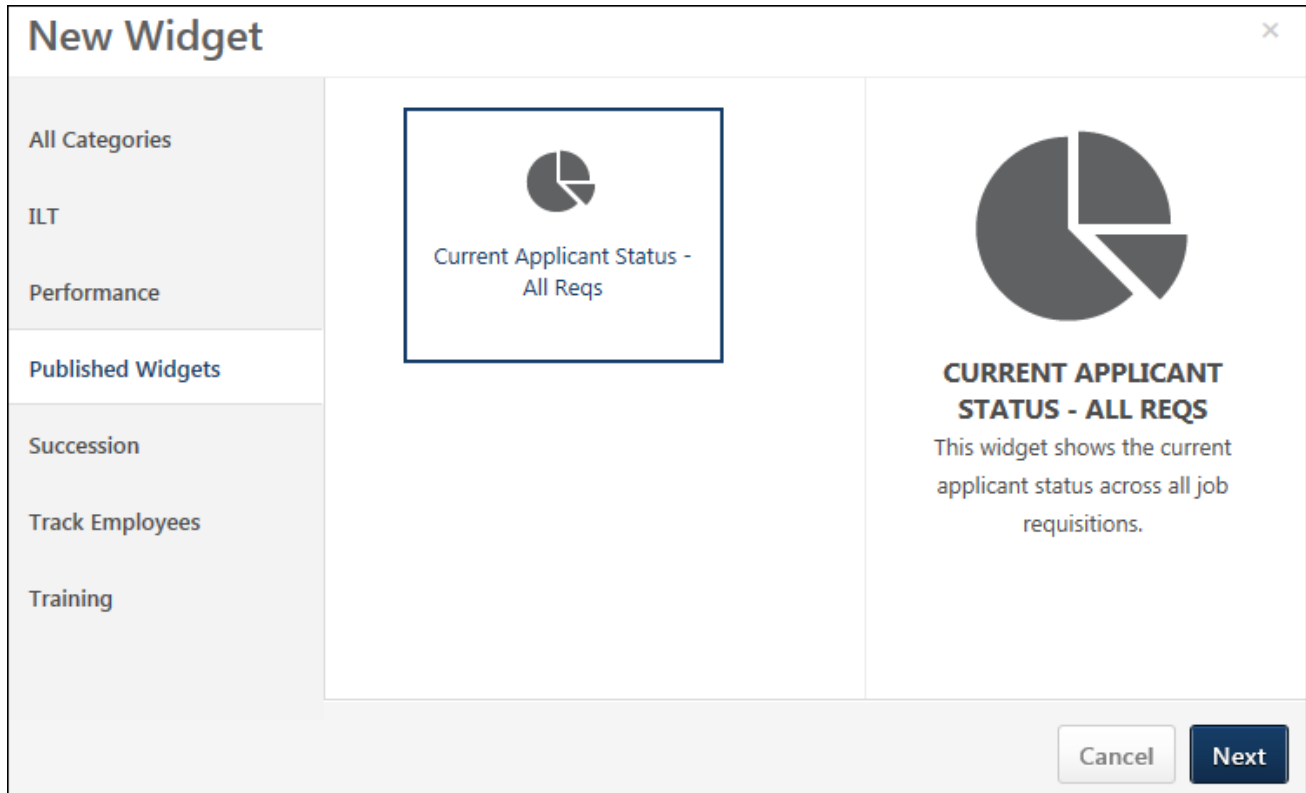
If you have created a report that includes a published widget, then the widget will be available to you in the Published Widgets category.

If a custom report that includes a published widget has been shared, then the widget will be available in the Published Widgets category for the shared users if they have permission to view the specific custom report type from which the widget was published. If they do not have permission to view the report type, then the widget does not display in the Published Widgets category, even though the report was shared with the user.

Add Published Widget

To add a published widget to a dashboard:

1. Select **New** or **Edit** from the **OPTIONS** drop-down. This opens the new dashboard page or the edit page for an existing dashboard.
2. Click **ADD WIDGET**. This opens the New Widget page.
3. Click the Published Widgets category. This opens a screen that displays all published widgets. **Note:** *The Published Widgets category is disabled until there is at least one published widget available for the user.*

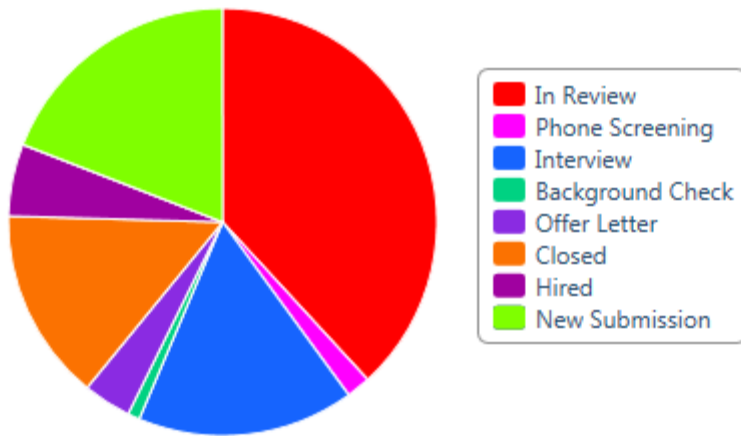


4. Select the desired widget.
5. Click **NEXT**. This adds the widget to the dashboard.
6. Enter a description for the widget in the **Type a Description here** field, up to 200 characters. This field is not required.
7. Click **SAVE** on the dashboard page. This saves the widget to the dashboard.

Published Charts Dashboard

This dashboard shows published charts.

CURRENT APPLICANT STATUS - ALL REQS



Last refreshed 6/27/2016 1:50:19 PM

Subplanning

Subplanning Overview

With this enhancement, the Subplanning functionality of Workflow Planning enables large-scale collaboration on headcount planning in an orderly and efficient way. Planning headcount for an organization requires input from many people in order to be accurate, but collaborating can be a logistical difficulty. In the Planning tool today, Human Resources leaders would have to create multiple smaller plans for each area of the organization, and then combine them at the very end in order to create a comprehensive, organization-wide plan.

With Subplanning, you can break up very large headcount plans into smaller plans for managers at lower levels, complete with a streamlined workflow from assignment to approval. You can then consolidate the smaller plans back into the larger plan. This allows you to have contributions from frontline managers, which creates a more accurate and realistic headcount plan.

Use Case

1. The Chief Executive Officer (CEO) of an organization Miller wants to do a company-wide headcount plan for the annual planning cycle. He wants the projections to be as accurate as possible, so he does not want just the executive team to create the plan. He also wants frontline managers to contribute to the plan.
2. The CEO creates a plan, and then assigns subplans to each of his executive team for their respective areas.
3. His executive team, in turn, assigns subplans to the managers reporting up to them. Now, the plan has been pushed down three levels in just a few steps and will be much more accurate because frontline managers have a better sense of their specific teams' needs.
4. Based on the size and structure, some divisions even push the subplanning down further to their lower managers.

Implementation

This functionality is available by request at an additional cost. Contact your Client Executive for additional information.

Security

The following existing permissions apply 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	Core Administration

	or Primary Planner This is an administrator permission.	
Work Force Planning - Subplanner	Grants the ability to complete subplans that have been assigned to the user as a Primary Planner or a Co-Planner. Users with this permission cannot create new headcount plans or view all plans. Within the plans assigned to them, users can assign subplans to their direct reports.	Core Administration

Assign Subplans

From the Assign Subplans page, you can assign and manage subplans for the headcount plan assigned to you. From this page, you can also view basic details about your overall headcount plan, such as the planners, due date, and plan period.

To access the Assign Subplans page, click **START PLANNING** from the Create a Plan page. Or, click the **SUBPLANS** button from the 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 as a Primary Planner or a Co-Planner. Users with this permission cannot create new headcount plans or view all plans. Within the plans assigned to them, users can assign subplans to their direct reports.	Core Administration

2017 HCP - VP, Operations Reports [Details](#)

Due Fri Sep 30 2016

[Go To Planning](#)

Assign Subplans

Hierarchy	Headcount	Primary Planner	Co-Planner	Due Date	Subplan Status	Actions
VP, Operations Reports	163	Roger Woodley		09/30/2016	N/A	N/A
Direct Reports	3	Roger Woodley		09/30/2016	N/A	N/A
Director, Security Reports	31				Not Assigned	Assign
Director, Facilities Reports	123	Roger Woodley		08/31/2016	Assigned	Cancel ▼
Director, Operations Reports	6				Not Assigned	Assign

Plan Name

The plan name displays at the top of the page. The plan name displays as "[Name of Plan] - [Area of the organization that is assigned in the subplan]."

Details

The **Details** link displays to the right of the headcount plan name. Click **Details** to open a pop-up that displays the planners, due date, and plan period. The pop-up also displays the area of the organization to which the headcount plan applies.

The screenshot shows a pop-up window titled "Test" with a close button (X) in the top right corner. The window contains the following information:

- Area of your Organization:** Entire Organization
- Primary planner:** Roger Woodley
- Co-Planners:** Not Specified

At the bottom, there are two boxes:

- Left box: **Not Specified** (DUE DATE)
- Right box: **Jul 2016 - Jun 2017 (Monthly)** (PLAN PERIOD)

Due Date

The due date of the overall plan displays in the upper-right corner of the page.

Go To Planning

Click **GO TO PLANNING** to open the overall headcount plan. *See Create Plan - Planning Page.*

Subplans Table

The subplans table displays the subplans and child subplans that are associated to a main headcount plan. The following information displays in the table:

- **Hierarchy** - This column displays the top level of the plan, encompassing the entire planning responsibility of the user. This column also displays the next two levels down the hierarchy, which are the direct reports and the reports of those direct reports.
 - **Entire Organization** - This row represents the top level of the plan. The status for this row is always N/A, and there are no actions available.
 - **Direct Reports** - This row represents the direct reports of the position to which the main plan rolls up (in example above the position is "VP, Operations"). The status for this row is always N/A, and there are no actions available.
 - **Next Level Down Direct Reports** - This represents the direct reports of the reports in the Direct Reports row. The Primary Planner, Co-Planner, and Due Date columns will be blank for this row until a subplan is assigned. The status for this row is Not Assigned until a subplan is assigned.

- **Headcount** - This column displays the baseline headcount value, which is the value at the beginning of the plan (the moment of the snapshot). This value is for informational purposes only and can help the planner decide whether an area (the area within the organization to which the plan applies) is large and might require a subplan.
- **Primary Planner** - This column displays the name of the primary planner.
- **Co-Planner** - This column displays the name of the co-planner, if a co-planner is assigned.
- **Due Date** - This column displays the due date of the overall plan or the subplan.
- **Subplan Status** - This column displays the status of the subplan. The following are the possible statuses:
 - **Not Assigned** - This status indicates that the subplan has not been assigned. Once a subplan is assigned, it will not return to this status.
 - **Assigned** - This status indicates that the subplan is assigned but has not been started by the subplanner.
 - **In Progress** - This status indicates that the subplan has been received. A subplan can return to this status after it was previously submitted but rejected by the senior planner.
 - **Submitted** - This status indicates that the subplan has been submitted but has not been approved/rejected by the senior planner.
 - **Approved** - This status indicates that the subplan was submitted, approved, and consolidated into its parent plan. The senior planner can edit the subplan area in this status (the subplanner no longer can edit the area).
 - **N/A** - This displays for rows that are not editable (i.e., the subplan cannot be assigned). This always displays in the row for the main headcount plan.

Actions

The following actions display in the Actions column:

Note: *No actions are available for the main headcount plan.*

Assign Subplan

Subplans that are in the Not Assigned status can be assigned. To assign a subplan:

1. Click **ASSIGN** from the Actions column. This opens the Assignment pop-up. The area within the organization to which the subplan applies displays in the **Area** field.
2. Select a primary planner from the **Primary Planner** drop-down. The options that are available are the direct reports of the position to which the main report rolls up.
3. Select a co-planner from the **Co-Planner** drop-down. You can select any user in the portal who was an active user at the time the headcount plan was created.
4. Enter a due date in the **Due Date of your Plan** field.
5. Click OK. This assigns the subplan to the primary planner and any co-planners that you have selected.

Once a subplan is assigned, the subplanner can manage the subplan in the same way that the planner manages the main headcount plan. The subplanner can access the plan from

the main **Headcount Planning** page. For more information about the Planning page of a headcount plan, see the **Create Plan - Planning Page** topic in Online Help.

Locked Headcount Planning Section

Once the subplan is assigned, the section of the main headcount plan that has been assigned is not editable on the headcount planning page. A lock symbol displays for that section of the plan until the subplan is completed by the subplanner. The user can still view that section of the plan but the user cannot edit any section of that plan. The values in that section of the plan reflect the point at which the subplan was assigned, not any changes made by the subplanner while the subplan was in the In Progress status.

2017 HCP - VP, Operations Reports [Details](#)

Due Fri Sep 30 2016

Subplans

Co-Planners

Review Plan

Plan

Year 1

Year 2

[Show Graphs](#)

Show

Headcount

USD

Add Position

Org / Position	Subplans	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Annual Cost
VP, Operations Reports		163	163	163	163	163	163	163	163	163	163	163	163	\$6,458,400
> Direct Reports		3	3	3	3	3	3	3	3	3	3	3	3	\$444,000
> Director, Facilities Reports		123	123	123	123	123	123	123	123	123	123	123	123	\$4,042,800
> Director, Operations Rep...		6	6	6	6	6	6	6	6	6	6	6	6	\$372,000
> Director, Security Reports		31	31	31	31	31	31	31	31	31	31	31	31	\$1,599,600

Edit Subplan

Click **EDIT** to edit the subplan assignment. This opens the Assignment pop-up. The **Primary Planner**, **Co-Planner**, and **Due Date** are editable fields.

Re-Assign

Click **RE-ASSIGN** to reassign the subplan. You can re-assign to the same primary planner that previously completed the subplan, or change to another primary planner.

Cancel

This action displays for subplans that are in an Assigned or In Progress status. Click **CANCEL** to merge the subplan with the main headcount plan, discarding any changes made by the subplanner and returning the subplan to the version that was assigned. This action cannot be changed once the subplan is merged with the main headcount plan.

Note: Cancelling a subplan does not automatically cancel its child subplans. Edits and submissions of those child subplans will not be merged with the main headcount plan.

Review

Click **REVIEW** to review the subplan. This opens the subplan page, which displays the planning table and the details of the subplan. This is similar to the Planning page for the main headcount plan.

From the subplan page for subplans that are in a Submitted status, you can click **ACCEPT** to accept the plan, or click **REJECT** to reject the plan, which will return the subplan to the primary planner and co-planners for further edits.

*For more information about the Planning page of a headcount plan, see the **Create Plan - Planning Page** topic in Online Help.*

Headcount Planning Page

When a subplan is assigned, the subplan can be accessed from the Headcount Planning page.

- **Assigned/In Progress Subplan** - Subplans that are in an Assigned or In Progress status display as cards in the Active Plans section. To view the subplan, click **GO TO PLANNING**. *Note: The headcount value is the value for that area at the moment the subplan is assigned.*
- **Canceled/Submitted/Accepted Subplan** - Subplans that are in a Canceled, Submitted, or Accepted status are moved to the Completed Plans section. Click **REVIEW** in the Actions column to view the subplan.

Headcount Planning

Here are all of your plans. You can resume any Active plan or look back at how a Completed plan is tracking to what has actually happened.

[Create New Plan](#)

ACTIVE PLANS

2017 HCP

Area: VP, Operations Reports

Owner: Roger Woodley

Primary planner: [Roger Woodley](#)

Co-Planners: [Not Specified](#)

Plan Horizon: 2 years

Headcount in Your Plan: 163

Due Fri Sep 30 2016

[Go to Planning](#)

Test

Area: Entire Organization

Owner: Roger Woodley

Primary planner: [Roger Woodley](#)

Co-Planners: [Not Specified](#)

Plan Horizon: 1 year

Headcount in Your Plan: 806

Due Not Specified

[Go to Planning](#)

COMPLETED PLANS

Name	Area	Date Completed	Primary planner	Plan Horizon	Headcount	Actions
2017 HCP	Director, Facilities Reports	06/27/2016	Roger Woodley	2	123	Review Export

View Data

View Data Overview

View Data enables organizations to interact with their talent data. Beyond simple tables and static visualizations, View Data combines data from multiple product modules and uses advanced visualizations to deliver not only an overview of the data but also a means to filter it down to the individual. With the July '16 release, View Data encompasses data from Performance, Succession, and Compensation.

Use Case

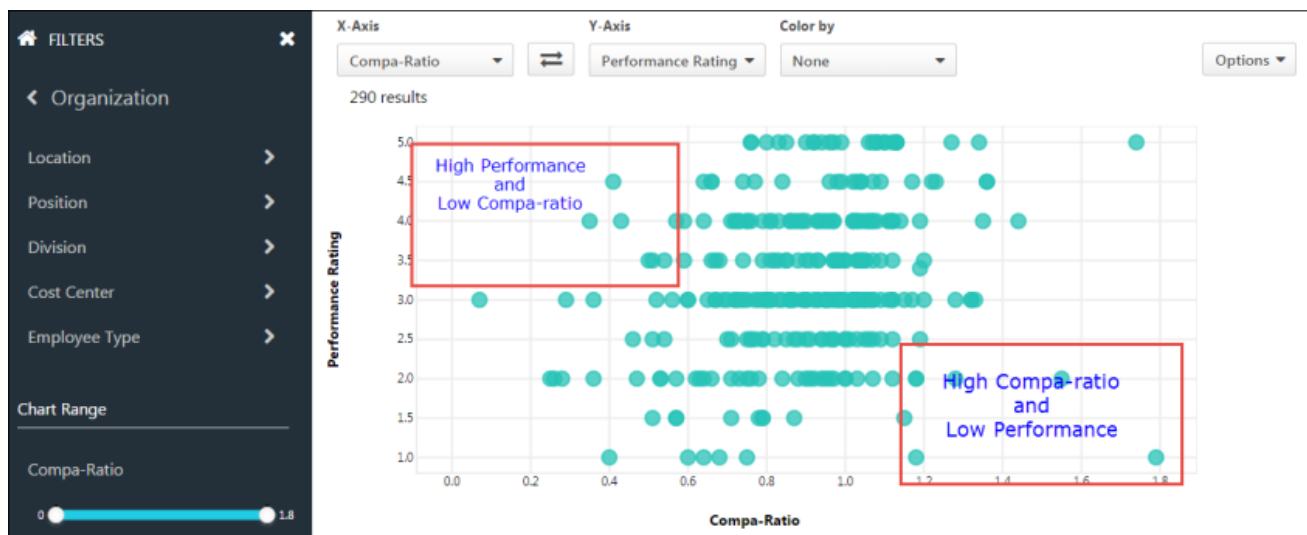
Silvia is the Chief Executive Officer of Dev Inc., a United States based company with 10,000 employees spread across 12 divisions. Silvia needs a visualization tool that enables her to get in touch with her organization's talent data beyond tables and fixed charts. She is currently focused on Performance vs. Compensation.

Areas of Focus

- Big Picture - At a company and division level
- Detailed View - Employee level details

Objectives

- Identify employees with Low Compa-Ratio vs. High Performance
- Identify employees with High Compa-Ratio vs. Low Performance
- Identify pockets of Performance or Compensation on which to focus.
- Explore trends by organizational unit (OU): Location, Position, Division
- Examine and compare how key groupings differ from each other



Implementation

This functionality is available by request at an additional cost. Contact your Client Executive for additional information.

Glossary

- View Data - Interactive visualization tool that combines product modules to compare data. This is a View term.

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Data: Preferences	Grants access View Data Preferences. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Subordinates, User's Direct Subordinates, and User's Corporation.	View
View Data: View	Grants access to View Data. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Subordinates, User's Direct Subordinates, and User's Corporation.	View

Navigation Tabs and Links

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

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 Data Preferences

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

- Define organizational unit (OU) filters
- Define succession metrics filters
- Define employee tooltips

To access View Data Preferences, go to **ADMIN > PREFERENCES > VIEW DATA PREFERENCES**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Data: Preferences	Grants access View Data Preferences. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Subordinates, User's Direct Subordinates, and User's Corporation.	View

View Data 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
<div>Add OU Type</div>		

Metric Filters

Select up to 5 metrics to display in the Metric category. Allowed types are rating scale, metric grid, formula metrics and numeric fields.

Order	Metric Title	Metric Type	Options
<div>Add Metric</div>			

Employee Tooltip Configuration

Select Organizational Unit types displayed in the tooltip. Your selections are based on the Organizational Unit types selected as filters above.

John Doe

X Variable:

Y Variable:

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 Data page: Division, Position, Grade, Cost Center, and Location. You can use the Organization Filters section in View Data 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.

Delete OUs

You can delete an OU by clicking **Delete** from the drop-down in the Options column.

Reorder OUs

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.

Metric Filters

Note: *Tenure and Merit Increase (%) are added automatically if available and are not user configurable.*

This section allows you to configure Succession metrics to see how they align with Comparison and Performance.

By default, there are no metrics selected to display in the Metrics filter on the View Data page. The metrics must be added in this section in order to appear as filters. The allowable metric types are rating scale, metric grid, formula metrics, and numeric fields.

Add Metrics

To add succession metrics:

1. Click the **ADD METRIC** button. This opens the Select Succession Metric to Add pop-up.
2. Select a metric from the **Metric** drop-down.
3. Click **ADD**. This adds the metric to the list of filters.

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

Metrics Table

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

- **Order** - This column displays the order in which the metrics display in the Metrics filter.
- **Metric Title** - This column displays the name of the metric.
- **Metric Type** - This column displays the type of metric 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.

Employee Tooltip Configuration

This section allows you to select the OUs that will be included in the tooltip that displays in the scatter graph when a plot point on the graph is hovered over or tapped on a mobile device. By default, the tooltip displays the user's name, as well as the variable on the X and Y axes of the graph. You can add up to two OUs to appear in the tooltip.

If OUs are not added, then the default display in View Data will be Division OU and Position OU.

To configure the tooltip OUs:

1. Add one or more OUs in the Organization Filters section of the preferences page.
2. The most recently added OU in the OUs list will appear in the first drop-down in the Employee Tooltip Configuration section.
3. The second most recently added OU in the OUs list will appear in the second drop-down. **Note:** *The order in which the OUs appear in the OUs table in the Organization Filters section does not determine which OU appears in the drop-downs in the tooltip section.*
4. If three or more OUs are added to the OUs section, then the drop-downs in the tooltip section allow you to select a different OU for the tooltip.

Organization Filters

Select up to 7 Organizational Unit types to be used as filters. Groups and OU types that support

Order	Organization Unit Type	Options
1	Division	▼
2	Position	▼
3	Location	▼

Employee Tooltip Configuration

Select Organizational Unit types displayed in the tooltip. Your selections are based on the Orga

John Doe

X Variable:

Y Variable:

Location ▼

Position ▼

Save Preferences

Click **SAVE PREFERENCES** 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.

View Data Page

From the View Data page, you can compare performance ratings and compa-ratio across the organization. For portals with Succession, you can also compare Succession metrics. The graph can also be colorized to provide a better visual of the various data points.

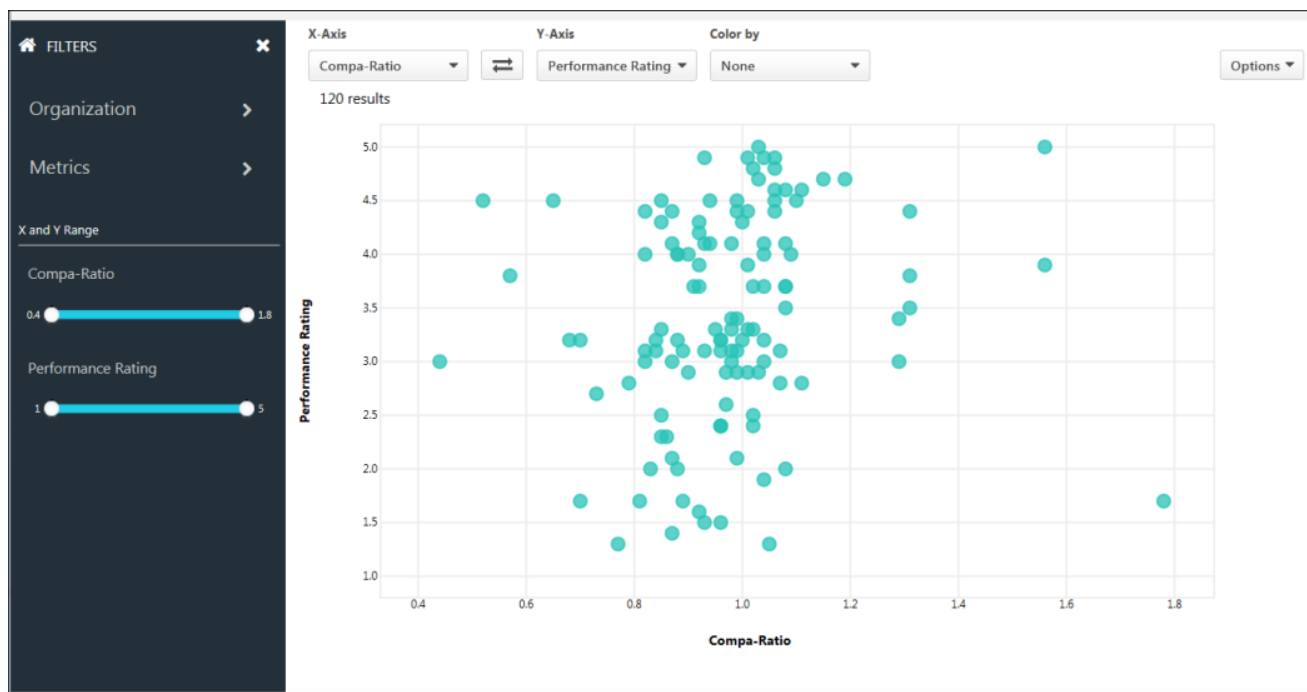
By default, when accessing the page, the performance ratings and compa-ratio data displays in the scatter graph. This allows you to quickly drill down to the desired data selections, using the filters and colorization tool.

View Data is limited to display up to 5,000 users at any one time. For portals with more than 5,000 users in their data base, only a partial set is displayed. The end user can use filters to see specific segments, as needed.

To access View Data, go to **VIEW > VIEW DATA**.

Permissions


PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Data: View	Grants access to View Data. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Subordinates, User's Direct Subordinates, and User's Corporation.	View




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 Data Preferences**.

Open/Close Filters Panel

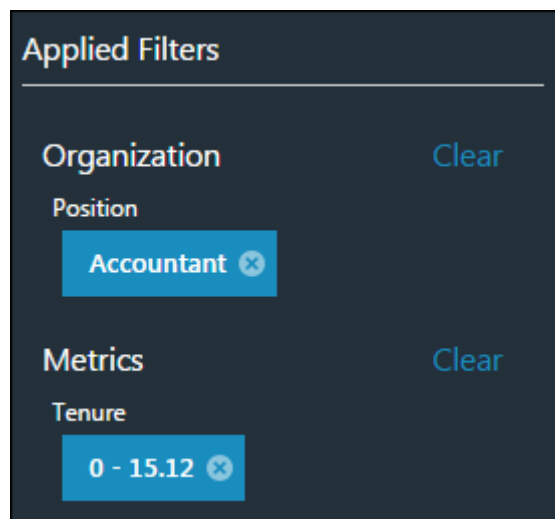
The Filters panel is expanded by default. To close the panel, click the X in the upper-right corner. To expand the panel, click *Open filters panel* button .

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/clear the filters.

Applied Filters

The Applied Filters section only displays once at least one filter is added. This section displays at the bottom of the Filters panel and shows you which filters you have applied to the data.



The following filters are available:

[Organization Filter](#)

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

[Metrics Filter](#)

Note: *Tenure and Merit Increase (%) are added automatically if available and are not user configurable.*

This filter allows you to filter by up to five different succession metrics in addition to Tenure and Merit Increase (%). The metrics that are available are configured by the administrator in [View Data Preferences](#).

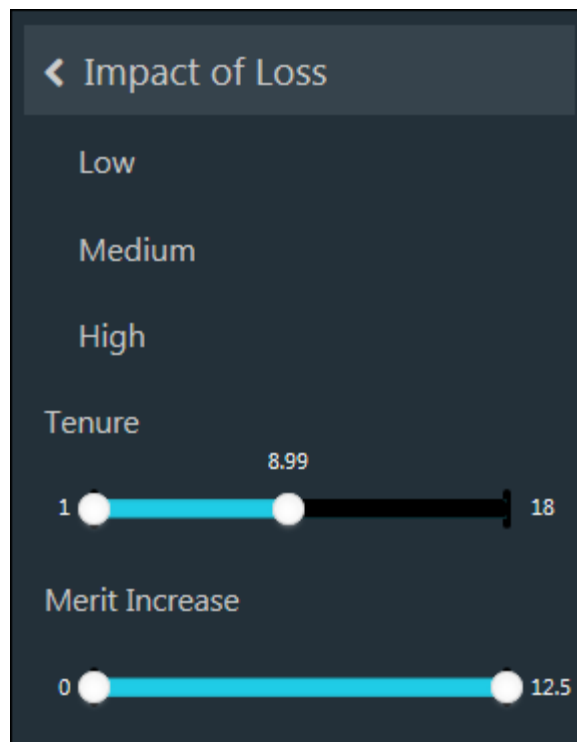
To filter by succession metric:

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

Tenure/Metric Increase % Filters

You can adjust the tenure and merit increase values for the graph by sliding the bar to the left or right from either side. This updates the graph based on the selected value.

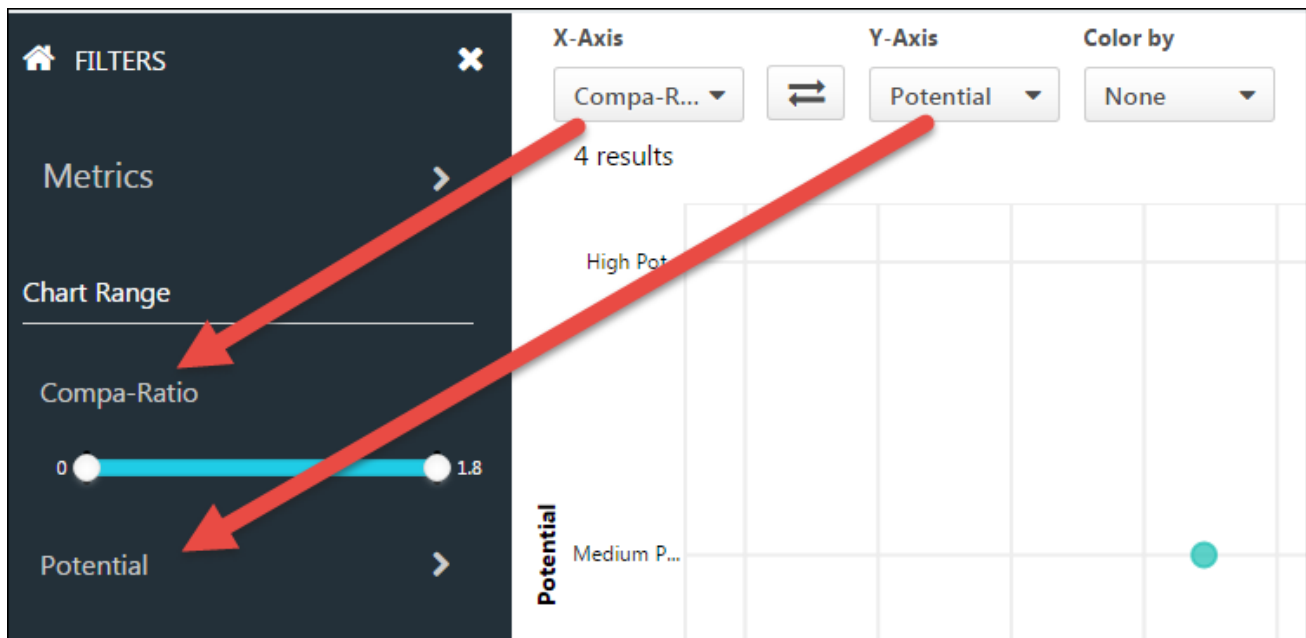
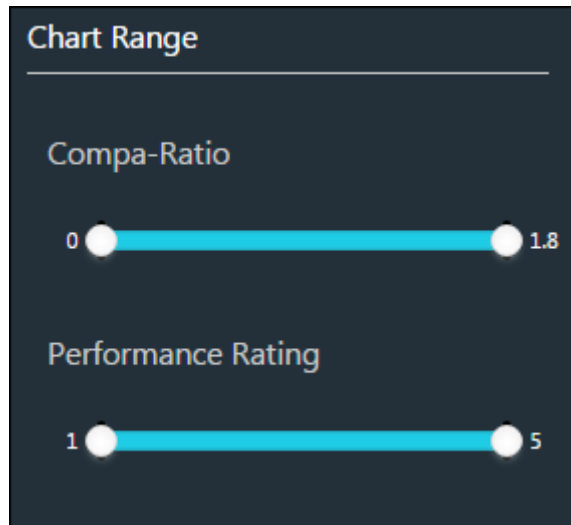
Note: *The percent merit increase = compensation increase/base salary (prior to the increase) * 100.*



[Chart Range Filters](#)

The Chart Range Filters correspond to your X and Y axis selection. By default, the Chart Y Range filters allow you to adjust the compa-ratio and performance rating by sliding the bar to the left or right from either side. This updates the graph based on the selected value. For Succession Metrics, the range filters change to a drop-down.

The range of the slider is determined by the Min and Max range of the population.



View Data Graph

The scatter graph for View Data displays the interactive visualization of your data based on the selected filters. Up to 5000 employees display.

You can define the X and Y axes, as well as define a colorization for the plot points based on compa-ratio, performance rating, or one of the available Succession metrics.

X-Axis

By default, compa-ratio displays as the X axis. In addition to compa-ratio, users will be able to select Tenure and Merit increase (%). For portals with Succession enabled, you can change the X axis to a Succession metric by selecting a metric from the axis drop-down. The graph will update automatically to display the new axis.

Y-Axis

By default, performance rating is the Y axis. In addition to Performance ratings, users will be able to select Tenure and Merit increase (%). For portals with Succession enabled, you can change the Y axis to a Succession metric by selecting a metric from the axis drop-down. The graph will update automatically to display the new axis.

Flip Axes

Click the Flip button  to flip the values for the X and Y axes.

Color By

You can define a colorization for the graph to provide a better visual of the data point variations. By default, you can select **Compa-Ratio**, **Performance Rating**, **Tenure**, or **Merit Increase %** from the **Color by** drop-down. For portals with Succession, you can also color by the available Succession metrics.

Color Legend

When using a color option, a legend displays to the right of the graph. The legend identifies the value for each color. You can also use the legend as a filter by clicking or unclicking a value on the legend to display or hide the value in the graph.

Discrete/Numeric

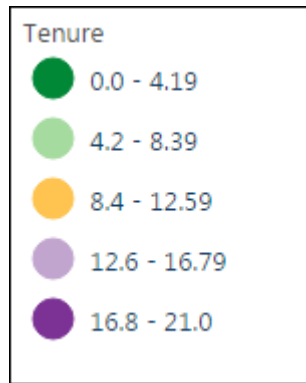
Up to nine segments are allowable for discrete values. Numeric values are divided into five equal segments.

Legend Segments

With the exception of Compa-ratio, all non-Succession metrics are uniformly broken up into five segments. The size of the segment is determined by the minimum and maximum range of the entire data set. The size of the segment cannot be configured by the user.

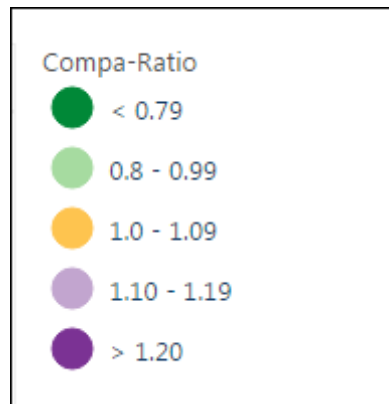
Example of Tenure Segments

- Minimum Tenure = 0.1
- Maximum Tenure = 21
- Segment Size = $(21-0)/5 = 4.2$
- Green is always assigned the lowest value, and purple is always assigned the highest value.



Compa-Ratio Segment

For compa-ration, the breaks are fixed at the following:



Succession Metrics

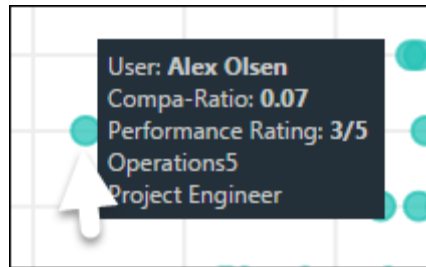
For Succession Metrics, the number of segments is based on metric type. Up to nine segments may be displayed. The color assigned is determined by the points assigned to the metric. Red is always assigned the lowest point rating, and green is assigned to the highest point rating.

Readiness		RATING SCALE		
		Points	Score Display	Rating
●	Non-promotable	1	<input type="text" value="1"/>	Non-promotable
●	Well-placed	2	<input type="text" value="2"/>	Well-placed
●	Ready Now	3	<input type="text" value="3"/>	Ready Now
●	1-2 Years	4	<input type="text" value="4"/>	1-2 Years
●	3-5 Years	5	<input type="text" value="5"/>	3-5 Years

Tooltip

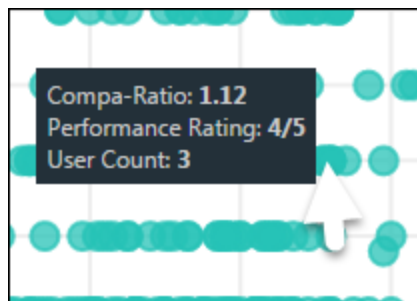
Hover over/tap a plot point to view the details for the particular employee. If the employee in focus shares the same X and Y values with other employees (a complete overlap), the tooltip displays the values for the X and Y axes and a count of the complete overlaps. For all others, the tooltip will always display the user's name and the variable on the X and Y axes for non. The tooltip may also display OU data, if configured by the administrator in **View Data Preferences**.

Tool Tip - Details for Individuals



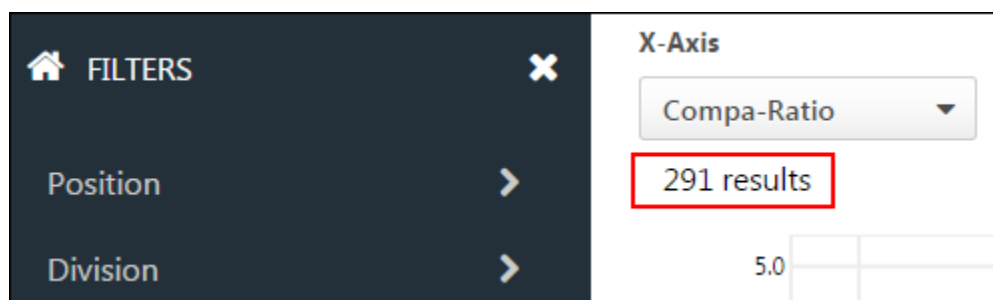
Tool Tip - Details for Multiple Individuals with the Same X and Y Values

The OU details for a data point are only displayed for non-overlapping data points. If you have overlapping points, View Data only shows the X and Y value, as well as a count of how many points are on the same spot.



Number of Results

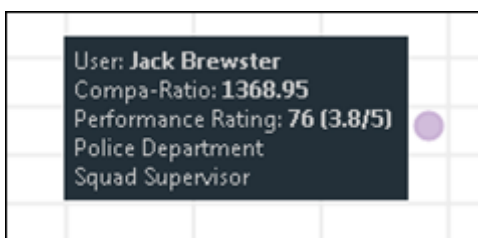
The total number of results on the graph displays in the upper-left corner above the graph. The results will not exceed 5,000 data points.



Performance Rating with Multiple Scales

For portals with performance data with multiple scales, (i.e 5/5 and 10/10), the data is automatically normalized to allow for comparisons. The slider maximum and chart axis are set to between 0 and 100. Normalization is achieved by dividing performance rating score received by the maximum achievable score. This setting is not configurable by the user.

The tooltip displays the current rating and the maximum rating next to the normalized score (e.g., 50 [2.5/5.0]).



Options

From the **Options** drop-down, you can click **Export to Excel** to export the graph to an Excel spreadsheet. This provides a detailed view of the users and their performance, compa-ratio, or Succession data. The filter fields that display on the Excel spread sheet match the fields displayed on the tooltip.

Report Generated By:	Lori Mullen				
Report Date/Time:	7/7/2016 8:36 AM				
Record Count:	102				
Filters:					
	Organization				
	Division: EMEA				
	Metrics				
	Merit Increase (%): 0 - 21.15				
			X-Axis	Y-Axis	Color by
User Full Name	Division	Position	Merit Increase (%)	Performance Rating	Performance
Andre Diaz	Sales7	Sales Man	1.50	2/5	Low
Roberta Lewis	Sales7	Sales Man	5.00	4/5	High
Anna Schneider	Marketing5	Market Re	1.50	3/5	Low
Arie White	IT4	Network A	1.50	2/5	Low
Charlie O'Neil	Admin4	General Of	5.00	3.5/5	High
Charlie Phillips	Sales7	Sales Dire	0.50	3/5	Medium
Daniel Becker	Marketing5	Marketing	0.50	2.5/5	Low
Derrick Bryan	Sales7	Sales Man	0.50	3/5	Medium
David Mitchell	Admin6	Office Man	1.50	3/5	Low
Daniel Moroni	Marketing7	Market Re	0.00	2/5	Low
David Wagner	Sales10	Sales Dire	1.50	3.5/5	High
Erin Bruno	IT4	Network A	2.00	4/5	High
Erin Edwards	Admin6	General Of	8.50	4.5/5	High
Elliot Murray	IT7	Network A	1.50	3/5	Low
Emil Olsen	Marketing6	Market Re	1.50	2/5	Medium

Web Service GlobalSearch (Update)

With this enhancement, the following field is now included in the GlobalSearch (REST) web service response:

- Training Purpose - This displays the training purposes that are available to users for the learning object (LO).

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.

Add OU Custom Fields to Custom Reports

With this enhancement, an OU Custom Fields section is added to the following custom report types:

- User Custom Reports
- Multi-Module Custom Reports

This section displays active Organizational Unit (OU) custom fields for which the report creator or viewer meets the availability criteria.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom User Reports - Create	Grants ability to create and edit Custom User reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom User Reports - View	Grants ability to view results of Custom User 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 Direct Subordinates.	Reports - Analytics
Custom Multi-Module Report - Create	Grants ability to create and edit custom Multi-Module reports. This permission works in conjunction with other Custom Report - Create permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Multi-Module Report - View	Grants ability to view results of custom Multi-Module reports created by self. This permission works in conjunction with other Custom Report - View permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics

Use Case

1. Sam creates the following OU custom fields:
 - A. Critical Role - Checkbox, OU Type Position
 - B. Division Tagline - Short Text Box, OU Type Division
 - C. Experience Level - Dropdown, OU Type Position
2. James is a Human Resources Administrator and has access to the Division Tagline and Experience Level custom fields.
3. James goes to custom reports and views the OU Custom Field section in the User Custom Report.

4. James does not see Critical Role as a custom field, since he does not have access to view this field.
5. James views the following custom fields in the OU Custom Field section of the User Report:
 - A. Division - Division Tagline
 - B. Position - Experience Level
6. James creates a report with Division Tagline, Experience Level, and OU Type from the OU Custom Field section.
7. James views the values entered for the custom fields for the OUs to which the users in his report belong.

Localization

If a custom field is not translated, and the user is logged in to the portal with a language that is not available for the custom field, then the field will not be visible in the custom report for that user.

Reporting Enhancements

Prior to this enhancement, when a user copied a shared report, all settings for the report were retained.

With this enhancement, when a user copies a shared report, the User/OU filters, Share, and Schedule settings are no longer retained.

Implementation

This functionality is automatically enabled for all organizations using Custom Reports.

User as of a Date Additional Fields

With this enhancement, newly added effective dated user fields can now be included in the User Record as of a Date standard report.

When setting the report criteria, the **Fields** section is renamed and is now titled **User Record Fields**. In addition, the fields in this section are now sorted from top to bottom and then left to right.

The Group By option is moved from the **User Record Fields** section to the **User Criteria** section.

The following additional fields are now available in the **User Record Fields** section:

- Termination Date
- Termination Reason
- Eligible for Rehire

In addition, the Time Zone field now accurately displays the user's time zone.

User Record as of a Date

Displays user data as of a specified effective date.

Report Criteria

Displays user data as of a specified effective date. The report does not return results based on current user data. Position custom fields included in the report are not effective dated.

Date Criteria

As of Date:

3/1/2016

12:00 AM

(timezone of user creating report):

User Criteria

User Criteria: Select Criteria

User Status: ☐ Include inactive

Group by: ☒ None ☐ Manager ☐ Position ☐ Division

User Record Fields

☐ 2nd Manager
☐ Absent
☐ AGE
☐ Allow Reconciliation
☐ Approver
☐ Brand

☐ Cost Center
☐ Department Director
☐ Division
☐ Email
☐ Employment Status
☐ Fax

☐ First Name
☐ Grade
☐ Language
☐ Last Hire Date
☐ Last Name
☐ Manager

☐ Middle Name
☐ Mobile
☐ Suffix
☐ Termination Reason
☐ Time Zone
☐ Training Budget Holder

☐ User Type
☐ Username
☐ State
☐ Status
☐ Transfer Date
☐ Zip

PROCESS REPORT

Report Title:

(If no report title is entered, the title of the report will default to User Record as of a Date)

Process Report

Processed Reports

Report Name	Create Date	Last Run	Output	Options
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Implementation

This functionality is automatically enabled for all organizations using Link.

To purchase Link, please contact Sales or your Client Executive.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Record as of a Date	Grants access to run the User Record as of a Date report, which displays user data as of a specified effective date. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The constraints on this permission limit the users and OUs that are available when running the report. Also, the constraints are based on the data as of the effective date of the report. This is an administrator permission.	Reports - System

User Types and Employment Statuses in Custom Reporting

With this enhancement, user type and status information can now be reported on in User Custom Reports from a new User Status Information section. Custom reports that include these fields can be filtered based on user type and/or status. This information can be used to identify trends relating to different types of users and their status.

In addition, fields are added to the User section for all reports that include a User section.

Permissions

The User Status Information section only displays for users who have permission to view users type and status in the user record. This permission is needed in addition to the applicable custom report type permissions. See the **Security Permissions** topic in *Online Help* for a list of custom report type permissions.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

User Status Information Section

The following fields are available in this section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Eligible for Rehire	Specifies if the user is able to be rehired by the company. This field is only available if Terminated is selected as a user status.	Text
Leave Type	Designates the type of leave on which the user is away. This field is only available if On Leave is selected as a user status.	Text
Termination Date	A user's termination date. This field is only available if Terminated is selected as a user status.	Date
Termination Reason	Specifies the reason the employee has left the company. This field is only available if Terminated is selected as a user status.	Text
Termination Type	A user's termination type. This field is only available	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
	if Terminated is selected as a user status.	
User Category	Designates the type of user. The text for these options can be modified, localized or deactivated by an administrator.	Text
User Employment Status	Designates the type of status of the user. This field is only available if Contractor, Employee, Intern, or Temporary is selected as a user type.	Text
User Subtype	Designates a more specific type of user. Subtypes are optional and only appear if specified by administrators.	Text

Master List of New Report Fields - July '16 Release

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

Core

FIELD NAME	SECTION	CUSTOM REPORT NAME
Eligible for Rehire	User Status Information	User Custom Report
Leave Type	User Status Information	User Custom Report
Termination Date	User Status Information	User Custom Report
Termination Reason	User Status Information	User Custom Report
Termination Type	User Status Information	User Custom Report
User Category	User Status Information	User Custom Report
User Employment Status	User Status Information	User Custom Report
User Status	User Status Information	User Custom Report
User Subtype	User Status Information	User Custom Report
User Type	User Status Information	User Custom Report

Learning

FIELD NAME	SECTION	CUSTOM REPORT NAME
Course Code	Training	<ul style="list-style-type: none"> ○ Certification Report ○ Compliance Report ○ Evaluations Report ○ Multi-Module Report ○ NASD User Report ○ Training Plan Report ○ Training Report ○ Transaction Report ○ Transcript Report
Curriculum Title	Training	<ul style="list-style-type: none"> ○ Certification Report ○ Compliance Report ○ Evaluations Report ○ Multi-Module Report ○ NASD User Report ○ Training Plan Report ○ Training Report ○ Transaction Report

FIELD NAME	SECTION	CUSTOM REPORT NAME
		<ul style="list-style-type: none"> ○ Transcript Report
Curriculum Section	Training	<ul style="list-style-type: none"> ○ Certification Report ○ Compliance Report ○ Evaluations Report ○ Multi-Module Report ○ NASD User Report ○ Training Plan Report ○ Training Report ○ Transaction Report ○ Transcript Report
Session Withdrawal Date	Transcript	<ul style="list-style-type: none"> ○ Certification Report ○ Compliance Report ○ Evaluations Report ○ Multi-Module Report ○ NASD User Report ○ Test Report ○ Transaction Report ○ Transcript Report

Recruiting

FIELD NAME	SECTION	CUSTOM REPORT NAME
Applicant (User) Opt Out flag	Applicant	Recruiting and Multi-Module Custom Reports
Requisition Number of Submissions	Requisition	Recruiting and Multi-Module Custom Reports
Requisition Posting - Job Board - Clicks	Requisition	Recruiting and Multi-Module Custom Reports
Requisition Posting - Job Board - Language	Requisition	Recruiting and Multi-Module Custom Reports
Requisition Posting - Job Board - Type	Requisition	Recruiting and Multi-Module Custom Reports

Edge

Edge Manage Users Tab

Edge Integrate: Separate Manage Users Tab - Overview

Prior to this enhancement, administrators managed Edge integrations and performed user mapping from the Edge Integrations page. Managing users is an ongoing task, while Edge integrations are deployed once and do not require ongoing maintenance, so a reorganization of these features has been initiated.

With this enhancement, users can be managed from a separate tab in Edge Integrations, eliminating extraneous data and functionality from the administrator's experience when managing users.

Considerations

This enhancement only impacts Edge integrations that support manual user mapping.

Implementation

This functionality is automatically enabled for all clients using the Edge module.

Permissions

The following existing permission applies 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 Integrate - Manage Users Tab

User mapping for Edge integrations can now be managed from a separate tab on the Edge Integrate page. On the Manage Users tab, administrators can add new users and modify the information for existing users.

To access the Manage Users tab, go to **ADMIN > TOOLS > EDGE** and click on an integration which supports user mapping. Click the Manage Users tab.

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

The screenshot shows the Edge Integrate web application interface. At the top, there is a navigation bar with a hamburger menu icon, the 'Edge Integrate' logo, and a user profile 'john doe'. Below the navigation bar, there is a breadcrumb trail: 'Back' (with a left arrow icon), 'Multiposting Job Posting' (with a blue icon), and 'Development' (in a rounded rectangle). The main content area has three tabs: 'Settings', 'Manage Users' (which is active and underlined), and 'Transaction History'. Below the tabs, there is a 'Setup Instructions' section with an information icon. The main section displays a table with columns: 'Cornerstone User ID', 'Multiposting Password', 'Multiposting Username', 'Active', and 'Modify'. The first row shows a user with ID '1', a masked password '****', username 'kshah', an active status (indicated by a blue toggle switch), and modify/delete icons (yellow and red squares). At the bottom right, there is a green button labeled 'Add New User' with a plus icon.

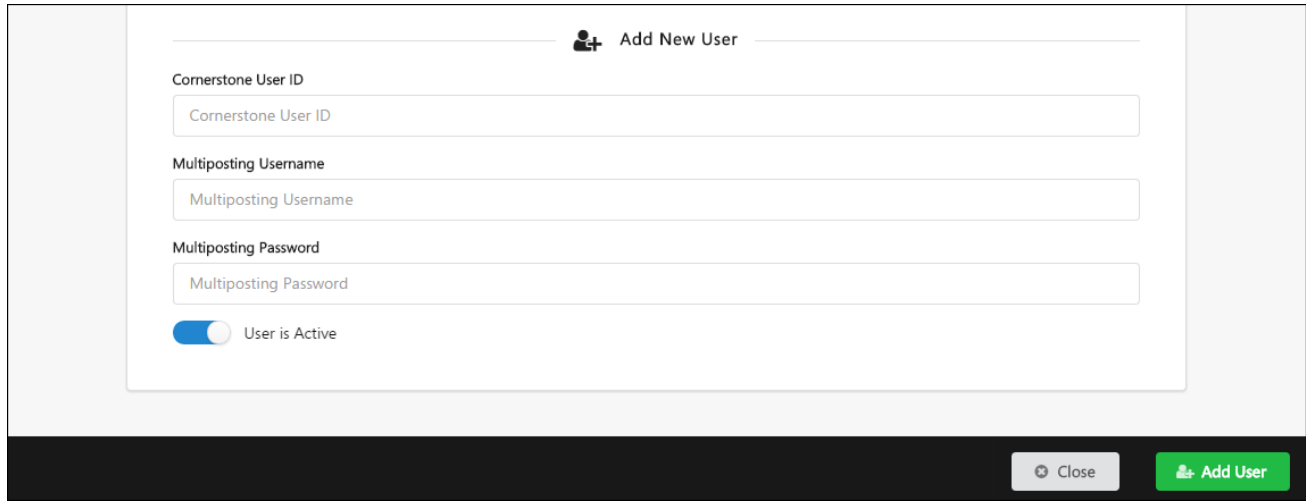
Manage Users Tab

The Manage Users tab of the Edge Integrate portal allows you to map users to an integration. From this page, administrators can view, modify, and delete existing users, and they can also add new users and save any setting modifications.

Add New User

Administrators can add new users to the integration from the Manage Users page. Users must have an account with the integration software and also be added to the integration from the Manage Users page in order to use that integration's functionality in the system.

The **ADD NEW USER** button in the bottom right corner of the Manage Users page allows you to add a new user to the integration after supplying all the required information for the user.



The screenshot shows a modal window titled "Add New User" with a user icon. It contains three text input fields: "Cornerstone User ID", "Multiposting Username", and "Multiposting Password". Below these fields is a toggle switch labeled "User is Active", which is currently turned on. At the bottom right of the modal, there are two buttons: a "Close" button with an 'X' icon and an "Add User" button with a user icon.

Save Settings

To save the settings made to the Manage Users page, click the **SAVE SETTINGS** button.

Edge Integration Purchasing Enhancements

Edge Integration Purchasing Enhancements

Prior to this enhancement, there were limited options for managing Edge Integration trials and orders.

With this enhancement, several new features have been added to improve the usability of Edge Integration purchase administration. These features include:

- Auto-disablement of unpurchased Edge Integration trials
- Automatic trial period expiration
- Prevention of duplicate trial periods
- Downloadable purchase histories
- Records of Edge Integration purchases

These added features can help Edge administrators improve tracking, improve sales, and generate sales records.

Implementation

This functionality is automatically enabled for portals using the Edge module.

Permissions

The following existing 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

Trial Period Expiration

If an Edge integration is not purchased before the trial period for that integration expires, the integration is now automatically disabled and uninstalled at the point of trial expiration. Once disabled, the integration cannot be re-enabled without purchase.

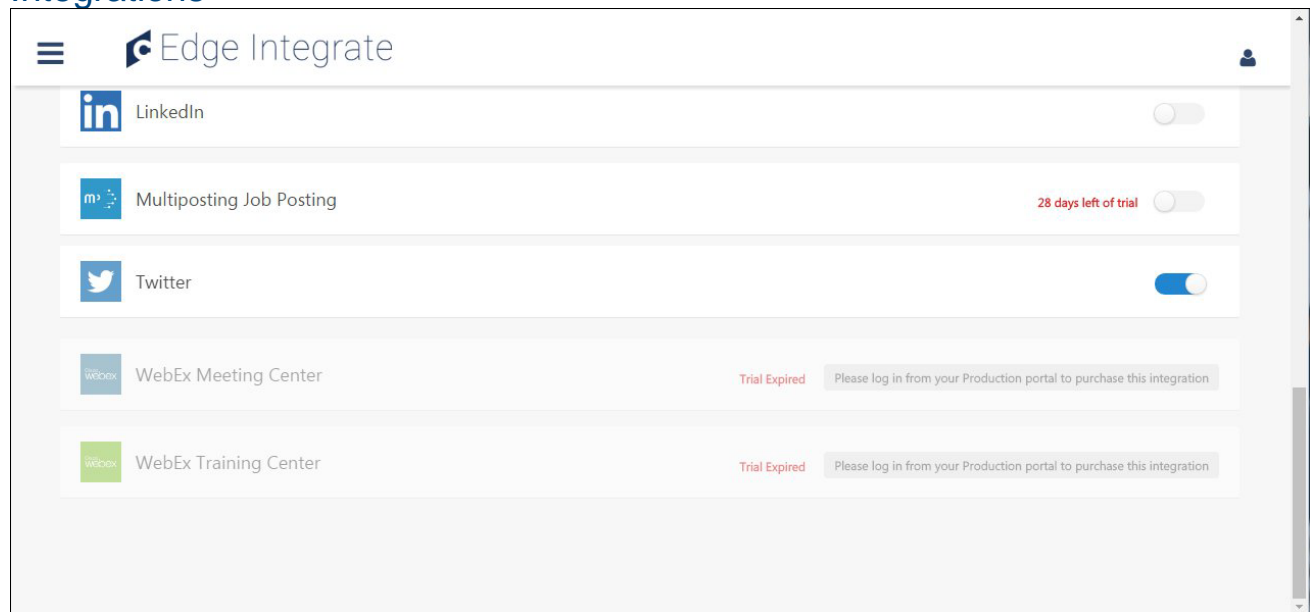
Note: *If the integration is purchased before the trial period expiration date, the integration is not disabled and remains functional.*

To access your integrations, go to **ADMIN > TOOLS > EDGE > INTEGRATIONS**.

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
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

Unpurchased Integrations



On the Integrations page, unpurchased integrations display with the number of days left before trial expiration. Once a trial expires, the integration is grayed out and not clickable.

To manage the integration, the administrator must access the integration from the Edge Marketplace to purchase and subsequently reactivate the integration in their portal.

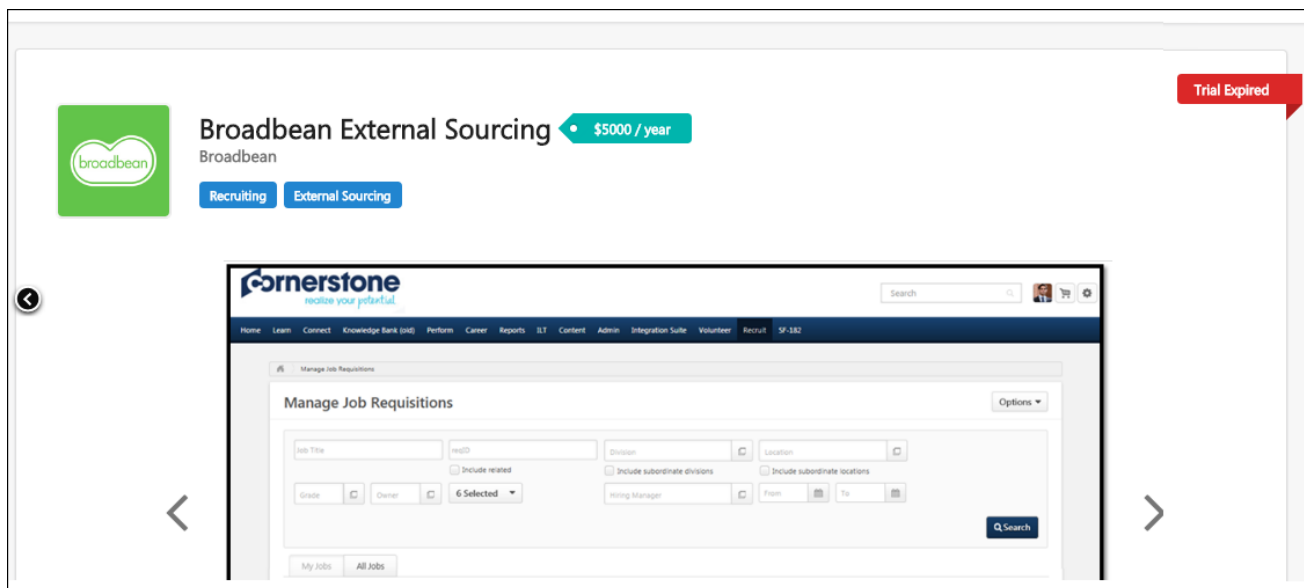
Prevention of Duplicate Trials

The system now prevents Edge administrators from trialing an integration more than once from the Edge Marketplace.

To access an enhancement from the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE** and select an integration.

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



Trial Expired

If an administrator with the permission to configure Edge integrations views a previously trialed enhancement in the Edge Marketplace, and the trial has expired, a red Trial Expired notification displays in the upper-right corner of the integration's Marketplace page. After the trial has concluded, the option to initiate a trial is automatically removed from the page, and the administrator may not request another trial. The administrator can click the **PURCHASE** button to purchase and reactivate the integration.

Purchase History Tab

When Edge administrators view the details for an integration, there is now a Purchase History tab which shows transaction history information for all purchases and trials of that integration.

To access the Purchase History tab, go to **ADMIN > TOOLS > EDGE > ENHANCEMENTS**. Then, click on the Purchase History tab.

The screenshot shows the Edge Integrate web application. At the top, there's a navigation bar with a hamburger menu, the 'Edge Integrate' logo, and a user profile 'john doe'. Below this, a breadcrumb trail shows 'Back' with a left arrow, followed by 'Multiposting Job Posting' with a small icon, and a 'Development' status button. A secondary navigation bar contains 'Settings', 'Manage Users', and 'Transaction History' (which is underlined and highlighted). The main content area features a table with transaction history.

Order #	Product	Price	Term	Purchase By	Purchase Date	Billing Address	Modal
--	Multiposting Job Posting	5000.0 USD	30 Day(s)	--	--	--	PDF
--	Multiposting Job Posting	5000.0 USD	30 Day(s)	--	--	--	PDF

Purchase History

The Purchase History tab allows administrators to view each instance that a specific integration was purchased and trialed. Transactions display chronologically, and may be downloaded by clicking the **DOWNLOAD** button.

The purchase history table includes the following fields:

>Order Number - This column shows the unique, auto-generated alphanumeric code used to identify the transaction, if the transaction was a purchase. If the transaction was a trial download, this column displays the word, "Trial." The order number is clickable and allows the administrator to download the Record of Order document for that transaction. **Note:** *The Record of Order is a new document with this enhancement. See the Record of Order section below for more information.*

>Product - This column displays the name of the integration purchased.

>Price - This column shows the amount paid for the integration.

>Term - This column shows the amount of time for which the integration is active for the purchaser, per the terms of the purchase.

>Purchase By - This column displays the name, phone number, and email address of the purchaser, as provided by the purchaser in the Company Contact Information section of the checkout process.

>Purchase Date - This column displays the date the transaction occurred.

>Billing Address - This column displays the purchaser's billing address, as provided by the purchaser in the Billing Information section of the checkout process.

Record of Order

Edge Administrators may now download a PDF of their integration purchases. To access the Record of Order document, click the linked order number in the Order # column in the Purchase History table. The PDF will begin downloading after clicking this field. The Record of Order document includes the following information:

>Order Number

>Order Date

>Terms and Conditions

>Integration Prerequisite Information

>Integration Name

>Price of Integration

>Currency of Price

>Portal Name

>First and Last Name of Purchaser

>Billing Contact Name

>Billing Address

>Billing Email Address

>Billing Phone Number

Learning

Custom Reports Additional Learning Fields

Add LMS Curriculum, Withdrawal Date, and Course Code Fields to Custom Reports

With this enhancement, new LMS fields have been added to custom reports to support new functionality and increase the effectiveness of custom reporting functionality. New custom report fields have been added for the following system features:

- Curriculum Title
- Curriculum Section
- Session Withdrawal Date
- Course Code

Use Cases

Sam Smith is an LMS administrator and needs to accurately report on on training included in a curriculum, as well as the dates users withdrew from a session. Sam is also using the new course code functionality to uniquely identify learning objects (LOs).

Sam builds a Transcript Custom Report and includes fields to gather data on curricula training, withdrawal dates, and course codes. This allows Sam to create a report with the data he needs. He is able to gather data on the training included in curricula, see when users withdrew from specific sessions, and uniquely identify his courses without using the lengthy learning object ID.

Considerations

The following custom report types are impacted by this enhancement:

- Certification Report
- Compliance Report
- Evaluations Report
- Multi-Module Report
- NASD User Report
- Training Plan Report
- Training Report
- Transaction Report
- Transcript Report
- Test Report

Note: *Course Codes are not currently included in certification reporting.*

Implementation

This functionality is automatically enabled for all portals using Custom Reporting.

LMS Fields - Curriculum Title, Section, and Withdrawal Date

New LMS fields are now available from the Training and Transcript sections of several different types of custom reports.

Training Section Fields

The following LMS fields have been added to the Training section of custom reports:

- Course Code - This field is a unique identifier for a learning object (LO). *Note: Certifications do not currently support course codes.*
- Curriculum Title - This field is the name given to a curriculum (if training is part of more than one curriculum, each curriculum displays in a separate row).
- Curriculum Section - This field is the name given to a section within a curriculum. All training in a curriculum must be within a section.

Fields added to the Training Section of Custom Reports will be available in the following report categories:

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

Transcript Section Fields

The following LMS field has been added to the Transcript section of several different types of custom reports:

- Session Withdrawal Date - This field indicates the date a user withdrew from an instructor-led training session (the exact time is not included in this field).

The field added to the Transcript Section of Custom Reports will be available in the following report categories:

- Certification Report
- Compliance Report
- Evaluations Report
- Multi-Module Report
- NASD User Report
- Test Report
- Transaction Report
- Transcript Report

Course Recommendations: Preview Program

Course Recommendations: Preview Program Overview

With the July '16 release, 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.

With this enhancement, the Training Completion page can be configured to display additional training that is recommended to the user. When course recommendations are enabled for a portal, administrators can configure whether or not course recommendations are displayed on the Training Completion page. In addition, administrators can exclude certain learning objects from the course recommendations.

The course recommendations are powered by sophisticated machine learning and are based on what other users with similar course histories have completed. For example, if there is a user who has completed similar training, then the system will recommend other training that the similar user has completed.

The initial release of Course Recommendations is a limited Preview program. At a future date, this functionality will be available to all organizations.

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. Lastly, Michelle will see personalized training recommendations she may be interested in taking, encouraging her to continue learning.

These features offer Michelle gratification for completing her training, keep her engaged, and encourage her to continue her professional growth and development.

Considerations

The list of courses recommended to users is refreshed every seven days.

Only the latest version of training that is active, available to the user, and eligible for course recommendations is included in the recommendations.

The Recommended Training section does not include any course that is on the user's transcript. Also, sessions and cohorts are not included in the recommendations.

Implementation

The initial release of Course Recommendations is a limited Preview program. At a future date, this functionality will be available to all organizations.

This functionality is only available for organizations using the Learning module.

When Course Recommendations are enabled for the portal, the Course Recommendations section is enabled on the Training Completion page by default.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	<p>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.</p> <p>With the October '16 release, this permission enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission).</p>	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

Training Completion Page Preferences - Course Recommendations

With the April '16 release, administrators now have the ability to enable a Training Completion page, which may include course recommendations.

To support this enhancement, the Training Completion Page Preferences page now has an additional option that enables administrators to enable or disable course recommendations for the portal.

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

The following new option is now available in Training Completion Page Preferences:










- **Enable Course Recommendations** - This option is only available when Course Recommendations are enabled. When this option is selected, a section is added to the Training Completion page that displays recommended courses to a user.

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:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Course Recommendations

Enable Course Recommendations: ☒

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 have successfully 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.

Course Catalog - Exclude from Recommendations

With the April '16 release, administrators now have the ability to enable a Completion page, which may include 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.

To access the Course Catalog, go to **ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	<p>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.</p> <p>With the October '16 release, this permission enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission).</p>	Learning - Administration

The following new option is now available in the General tab of the Course Catalog:

- **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.*
 - Use Case: A New Hire training course should be excluded from recommendations because users should only complete this training when it is assigned to them.

This field can be edited when batch editing LOs via the Course Catalog.

Training Purpose:	Indicate the training purposes available for selection in a drop down by the end user:	
	<input type="checkbox"/> Knowledge Management <input type="checkbox"/> New Course Version	
Exclude from Course Recommendations:	<input type="checkbox"/> When selected, this training will not be recommended to users via Course Recommendations.	
Active:	<input checked="" type="checkbox"/> When selected, this training is active <input type="checkbox"/> Deactivate this course on <input type="text"/>	

Training Completion Page - Course Recommendations

With the April '16 release, 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.

With this enhancement, the Training Completion page can be configured to display additional training that is recommended to the user.

Recommended Training

This section is only available when Course Recommendations are enabled for the portal via the Training Completion Page Preferences and for the completed course via the Course Catalog.

This section displays training that is recommended to the user based on what other users with similar course histories have completed. For example, if there is a user who has completed similar training, then the system will recommend other training that the similar user has completed.

Only the latest version of training that is active, available to the user, and eligible for course recommendations is included in the recommendations. This section does not include any course that is on the user's transcript. Also, sessions and cohorts are not included in the recommendations.

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

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

Up to four LOs are displayed at once. To view additional LOs, click the arrow to the right of the section. This displays the next four LOs. A maximum of 12 recommendations may be available. **Note:** *If the user does not have 12 recommended courses, only the number of available recommended courses displays. If no recommendations are available, a message displays informing the user they do not have any recommendations.*

No Results

If no course recommendations display for a user on their Training Completion page after they complete an LO, the following message will display to the user:

Uh oh! Looks like we don't have any recommendations for you yet. Check back later.
[Want to browse for more training? Click here.](#)

Clicking the **Want to browse for more training? Click here.** link navigates the user to the Browse for Training landing page. **Note:** If no Browse for Training landing page has been configured in the portal, the user is navigated to the Browse for Training page.

If the user does not have any course recommendations, one of the following scenarios may have occurred:

- No results were returned because the system did not have enough user data for the user to provide recommendations.
- No results were returned because service is down.

Data Load Wizard System Generated Identifier for Learning Object Loads

This enhancement to the Data Load Wizard provides support for loading events and sessions into the system with a system generated identifier. **See [System Generated LO IDs - Overview](#)** on page 236 *for additional information*.

With this enhancement, when loading events and sessions into the system using the Data Load Wizard, administrators can enable the system to generate a course code based on configured prefixes, suffixes, and separators in Course Code Preferences.

Auto-generation Rules

When the course code functionality is enabled and activated for the portal, then events and sessions that are loaded via the Data Load Wizard are automatically assigned a system-generated course code.

When the course code functionality is disabled or not activated for the portal, then events and sessions that are loaded via the Data Load Wizard are not assigned a course code. However, the learning object (LO) is always assigned a LO ID.

Considerations

With this release, organizations cannot update or manually set course codes via the Data Load Wizard.

Implementation

The course code functionality is controlled by a backend setting, which is disabled by default. If the course code functionality is enabled for a portal, it must be configured and activated via Course Code Preferences before it is utilized within the Data Load Wizard.

This functionality is only available to organizations using the Learning module and the Data Load Wizard.

In order to purchase 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 - 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 -	Enables administrator to load learning data via the Data Load Wizard. This permission also enables administrators to track	Data Load

Learning	data loads and manage data load templates. This is an administrator permission.	Wizard
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Instructor-Led Training Reservations and Restrictions Enhancements

ILT Reservations and Restrictions - Overview

Prior to this enhancement, when administrators made modifications to ILT enrollment and restrictions criteria after users had already registered, there was potential for the system to inaccurately calculate the number of available seats that displayed for the session.

With this enhancement, the system reprocesses users who have already registered for a session if an administrator makes changes to the session's ILT enrollment and restrictions criteria. This ensures that the number of reserved seats available is accurately recalculated and displayed, increasing the stability of this functionality.

Implementation

This functionality is automatically enabled for all portals using the Learning module.

Permissions

The following existing permissions apply to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
ILT Preferences - Manage	Grants ability to configure a variety of default settings that apply to new instructor led training events and sessions. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Inventory - Manage	Grants ability to purchase multiple learning object licenses with the intent to assign that training to other users at a later time. This permission can be constrained by OU and User's OU.	eCommerce
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events	Learning - Administration

	- View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	
Sessions - Cancel	Grants ability to cancel instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission.	Learning - Administration
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration

Seats Available Pop-Up Window

The system now reprocesses users who are registered for a session when an administrator modifies the enrollment and restrictions criteria for the session. This ensures the correct calculation and display of reserved seats available in the Seats Available pop-up window.

Registered users are reprocessed when an administrator makes changes to enrollment and restrictions criteria for a session from any of the following areas:

- Manage Events & Sessions
- Proxy Enrollment
- Assign Training (accessed from any location)
- Waitlists
- LO Details

The Seats Available pop-up can be viewed by clicking the **Seats Available** link on the Session Roster page. This link is not available if enrollment reservations and restrictions are not defined for the session.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
ILT Preferences - Manage	Grants ability to configure a variety of default settings that apply to new instructor led training events and sessions. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU,	Learning - Administration

	User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Inventory - Manage	Grants ability to purchase multiple learning object licenses with the intent to assign that training to other users at a later time. This permission can be constrained by OU and User's OU.	eCommerce

Ambrish Regression Event - Mkinsey Issue (Do Not Request)

Session Details

Locator Number: 9635
 Subject: 0305 Subject
 Training Hours: 8 Hour(s) 50 Minute(s)
 Credits: 0
 Price: \$.00

Organizational Unit(s):	Reserved Seats:	Reserved Seats Used:	Reserved Seats Available:	Registered Seats:	Max Seats Allowed:
Fire Department	2	0	2	2	
Police Department	2	0	2	2	
Legal Department	1	0	1	1	
Public	1	0	0	0	
Total	6	0	5	5	

Reprocess Users

Registered users are reprocessed when an administrator makes changes to the enrollment and restrictions criteria for the following types of sessions:

- Sessions with seat reservations and no inventory
- Sessions with seat restrictions and no inventory
- Sessions with both seat reservations and seat restrictions and no inventory

When the registered users are reprocessed, the number of available seats is accurately calculated by the system and displays correctly to the administrator in the Reserved Seats Available column in the Seats Available pop-up window.

Mark Complete After Launch

Mark Training Complete - Overview

Prior to this enhancement, learners were able to mark material learning objects (LOs) complete, even if the learner had not yet launched the material.

With this enhancement, the option to mark a material complete is not available to the learner until they have launched the material. Materials can also now move to an In Progress status after they have been launched, to help users ascertain their current progress on a material LO. The wording of the completion action for materials has also changed from "Complete" to "Mark Complete.". This enhancement applies to materials accessed from the following locations:

- Transcript (Old and New)
- Prerequisites, Pre-Work, and Post Work
- Curricula
- Cohorts
- Certifications
- Curricula Player (Old and New)
- Welcome Page Widgets
- Transcript Details
- Action Items

Use Cases

Lauren is an Account Executive at Acme Corporation. As part of her job, she is required to review a document on her company policies. Her manager has assigned the policy to her as a Material LO. This material now displays in her learning transcript. When Lauren accesses her transcript, she sees the LO with the option to launch the LO.

When she clicks **LAUNCH**, the company policy opens as a PDF in a new window. She reviews the document and closes the window once finished.

When she accesses her transcript again, she sees that the default action for the material has changed from **LAUNCH** to **MARK COMPLETE**. She clicks the **MARK COMPLETE** button to indicate that she viewed the policy and has completed the training.

Considerations

Any Materials launched prior to the July Release (and not marked complete) will need to be re-launched in order for the **MARK COMPLETE** option to display.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Material Management - View Users	Grants ability to view all users who have any version of the material on their transcript. Administrators with this permission can also access the transcript of enrolled	Learning - Administration

	users. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Provider. The constraints on this permission determine for which materials the administrator is able to view users and which users the administrator is able to view on the Enrolled Employees page. This is an administrator permission.	
Materials Management	Grants ability to view the Material Administration page and create, edit, and copy materials. Once created, these "materials" can be managed like other learning objects via the course catalog. This permission can be constrained by OU, User's OU, and Provider. The constraints on this permission determine which materials the administrator is able to view, edit, copy, and create. This is an administrator permission.	Learning - 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

Complete a Material Learning Object from Transcript

With this enhancement, the option for an end user to mark a Material learning object (LO) complete is not available until the material has been launched.

To launch and complete a material LO, go to **LEARNING > VIEW YOUR TRANSCRIPT** and find the material LO.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Mark Complete After Launch

To complete a material:

1. Access the material from the desired location. You may access the material from the transcript, Curricula Player, Transcript Details, Action Items, or from a Welcome Page widget, if configured in your portal and if the training displays in the widget.
2. Click the **LAUNCH** button for the material. When an end user accesses a material prior to launching it, the only options available on the transcript for the material are **LAUNCH** (as the default option) and **View Training Details**. The material opens in a pop-up window.
3. Review the material and close it when finished. After the material has been launched, the status for the material becomes In Progress, and an additional option to mark the training complete becomes available. The available options for a previously-launched material are: **MARK COMPLETE** (as the default option), **Launch**, and **View Training Details**.
4. Click the **MARK COMPLETE** button next to the material. The status of the material will change to Completed, and the option to mark the LO complete will no longer be available from the Options drop-down menu. The options available for a completed material are: **LAUNCH** (as the default option) and **View Training Details**. Additional options, such as evaluating the training or viewing an acknowledgment may display depending on how the material was configured.

Note: If no source was provided for a material during creation, the material cannot be in an In Progress status on a user's transcript, because the material cannot be launched. In this case, Mark Complete is the default option for the material.

Complete a Material Learning Object from Certification

When a user accesses a material contained in a certification, the default option for the material is **LAUNCH**. After the material has been launched from within the certification, the certification refreshes and the default option for the material becomes **MARK COMPLETE**. Once the user marks the material complete, the default option reverts back to **LAUNCH**. This behavior allows users to easily determine the current status of materials in their certifications.

Note: *Even if the user accesses the certification material from another location (such as Transcript Details), the options availability for the material remains consistent. The **MARK COMPLETE** option is not available until the material has been launched.*

Complete a Material as a Prerequisite, Pre-Work, or Post-Work

When a learning object (LO) includes a material as a prerequisite, pre-work, or post-work, the default option for the material is **LAUNCH**. After the material has been launched as a prerequisite, pre-work, or post-work, the default option for the material changes to **MARK COMPLETE**. Once the user marks the material complete, the default option reverts back to **LAUNCH**. This behavior allows users to easily determine the current status of materials serving as prerequisites, pre-work, or post-work for other training items.

Complete Material Learning Object from Other Locations

The new options behavior for materials is consistent regardless of the location from which the user accesses the material. The **MARK COMPLETE** option is only available for materials after the material has been launched and reaches an In Progress status. This workflow remains the same for materials accessed from the following additional locations:

- Curricula Player (Old and New) for both curricula and cohorts
- Transcript Details
- Action Items
- Welcome Page Widgets (such as the Actions widget)

Material Versioning - In Progress Status

When a new version of a material is created, the administrator now has the ability to push the new version to users with an In Progress status for the material. This enhancement is applicable to all material versioning types, including Material Versioning with Append, Material Versioning with Replace, and Simplified Material Versioning.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Materials Management	Grants ability to view the Material Administration page and create, edit, and copy materials. Once created, these "materials" can be managed like other learning objects via the course catalog. This permission can be constrained by OU, User's OU, and Provider. The constraints on this permission determine which materials the administrator is able to view, edit, copy, and create. This is an administrator permission.	Learning - Administration
Material Management - View Users	Grants ability to view all users who have any version of the material on their transcript. Administrators with this permission can also access the transcript of enrolled users. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Provider. The constraints on this permission determine for which materials the administrator is able to view users and which users the administrator is able to view on the Enrolled Employees page. This is an administrator permission.	Learning - Administration
Material Version - Replace Only - Manage	Grants ability to assign a new version of a material to a user. The constraints on this permission determine to which users the administrator can assign a new version of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users. This is an administrator permission. This permission only applies to organizations that are using Simplified Versioning for materials.	Learning - Administration
Material Version with Append -	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be	Learning - Administration

Manage	constrained by OU, User's OU, and Users. This permission only applies to organizations that are using Versioning with Append for materials.	
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Reversion Options - In Progress

On the Reversion Options page of the material reversioning process, a new option for pushing the new material version to In Progress users has been added. Administrators can now select from the following statuses when deciding which users to assign the reversioned material to, no matter which type of material versioning they are using:

Not Started – The user has not yet launched the material.

In Progress – The user has launched the material but has not yet marked it complete.

Completed – The user has marked the material complete.

Note: *Materials that do not have a source do not move to an In Progress status, because it is not possible to launch them.*

Reversion with Append

If the administrator selects the **Append** option when reversioning a material, the new material version will be added to users' transcripts as a separate LO, and the previous version will show Mark Complete as the default option.

Reversion with Replace

If the administrator selects the **Replace** option when reversioning a material, the new material version will replace the previous version on users' transcripts, and users will be required to launch the new version before the material can be marked complete.

Offline Network Player Login Customization

Prior to this enhancement, users were required to enter their portal name each time they logged in to the Offline Network Player.

With this enhancement, the administrator can predefine the portal name for users upon login. Once configured, users can log in to the Offline Network Player without having to enter the portal name as it will automatically appear on the login screen. This simplifies the login process.

The name of the AdminCredentialsApp.exe application has been changed to AdminConfigureApp.exe.

Use Cases

Sarah is an administrator at Cruise Lines Corp which operates off-shore cruises where little or no Internet connection is available. During cruises, employees are required to complete training, so the organization uses the Offline Network Player to enable offline training. Sarah wants to configure the portal name for learners so they do not need to enter it while logging in to the Offline Network Player. Sarah opens the Admin Configuration application and defines the portal name.

Raphael is an employee who works at Cruise Lines Corp. Raphael accesses the Offline Network Player to complete his required training. He sees that the portal name is pre-populated on the Login screen. He enters his user name and password to log in, and he launches the required training.

Implementation

This functionality is automatically available to all organizations using the Offline Network Player. Organizations using the Offline Network Player must download the latest version of the application and install it on each machine. The latest version is available by contacting Global Product Support (GPS). Prior to installing the new version, all data must be synced to the online server, and the previous version of the application should be removed.

Skillsoft Pre-test Functionality Removal

Currently, Skillsoft content purchased through Cornerstone's Content Services team is designed to include a Pre-Test which allows users to "test out" of a course if the minimum score is achieved without actually navigating through the course itself. Due to resounding feedback from our clients, we have opted to disable this feature for all clients who have purchased Skillsoft content through Cornerstone. Once this update is made, users will no longer have the ability to test out or skip through the course by completing the Pre-Test at the beginning of the course. This reinforces a learning culture and encourages learners to complete assigned trainings in its entirety, particularly those mandated by regulatory/compliance law.

This will be unavailable for testing during User Acceptance Testing (UAT) and will go into effect during the July '16 Release deployment on July 29. Opt-out is unavailable.

For further information, please visit the [Content Services FAQ](#) in the Cornerstone Success Center.

System-Generated Course Code for Learning Objects

System Generated LO IDs - Overview

Prior to this enhancement, the only unique identifier that could be used to search for a specific learning object (LO) was the Learning Object ID, which is 36 characters and not customizable by the administrator. This made finding a specific instance of an LO less intuitive for administrators.

With this enhancement, a unique course code is automatically generated for several types of LOs when they are created by an administrator. Similar to the Learning Object ID, the course code is automatically generated, unique, and non editable, but system administrators can control the format used by the system to generate course codes. Administrators can define the course code format via Learning Preferences.

Use Cases

Acme Corp has just purchased the Learning module. Using their previous system, Learning Objects were identified with unique codes. With the course code enhancement, Acme Corp will be able to load their previous catalog from the old system to their new Learning portal, including the course codes for each training item.

Acme Corp's previous system automatically assigned all new training items a code which began with "AC," followed by the next sequential number (example: AC2003). In the previous system, the last LO created was assigned the code AC2901. In their new Learning portal, Acme Corp would like the course codes for new LOs to pick up where the old course codes left off. By configuring Course Code Preferences in their Learning portal, Acme Corp's administrator is able to set their course codes to always begin with the prefix, "AC," and the numeric code that follows will begin with 2902 and progress sequentially for each new LO added to the system. Acme Corp can use these unique course codes to track and report on their learning.

Considerations

If course codes have been configured in a portal, LOs created after course code activation are automatically assigned a course code when they are created. LOs created prior to course code activation do not automatically receive course codes. A custom project is required to load course codes for existing LOs. For additional information, please contact your Client Executive.

This enhancement has been incorporated into the following Learning areas:

- Certification Management
- Course Catalog
- ILT Administration
- Learning Preferences
- Manage Events & Sessions
- Proxy Enrollment

The new course code functionality is available for all LO types **except** the following:

- External Training

- Libraries
- Postings

Implementation

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.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Code -Edit	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Course Code - Manage	Grants ability to access and manage the Course Code Preferences. This is an administrator permission.	Learning - Administration
Course Code - View	Grants ability to view Training Course Codes. This is an administrator permission.	Learning - Administration

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Preferences	Grant access to Learning Preferences. This permission must be combined with other permissions in order for specific preference links to appear. This is an administrator permission.	Learning - Administration

Course Code Preferences

Enabling course codes in your portal allows the system to auto-generate unique learning object (LO) IDs, which makes organizing and searching for training easier. Course Code Preferences can be set by administrators with the appropriate permissions. Once set, most course code configurations for a portal cannot be modified.

To set course code preferences, go to **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES** and click the **Course Code Preferences** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Code - Edit	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Course Code - Manage	Grants ability to access and manage the Course Code Preferences. This is an administrator permission.	Learning - Administration
Course Code - View	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Learning Preferences	Grant access to Learning Preferences. This permission must be combined with other permissions in order for specific preference links to appear. This is an administrator permission.	Learning - Administration

Course Code Preferences

The Course Code Preferences section allows administrators to configure the format that the system will use to automatically generate course codes for LOs. Administrators may configure the following fields:

>**Prefix** - Administrators may specify the course code prefix for their portal in Course Code Preferences, to ensure the course code naming convention aligns with their company's organization standards. Set a course code prefix for the portal by entering up to 20 alphanumeric and special characters into the optional **Prefix** field, which is blank by default.

Note: Spaces are not allowed at the beginning or end of the prefix.

>**Course Code Starting Value** - Enter the course code number that the system should begin with when course codes are activated in the portal. This field allows administrators to continue the course code naming convention used in a previous Learning Management System. This field is limited to 10 characters.

>**Code Minimum Characters** - From this drop-down menu, select the minimum number of characters each auto-generated course code must contain (E.g. If the starting value is 123 and the **Code Minimum Characters** field is set to 6, the auto-generated course code is 000123).

>**Allow Version Suffix** - Administrators can determine whether or not a version suffix is included in the course code, which causes the system to add a version number after the course code for all LOs that can be reverted (i.e. Online Courses, Tests, Curricula, and

Materials). This optional field is not selected by default. Check the **Allow Version Suffix** field to include the version number in the suffix of course codes for versionable LOs.

>**Separator** - If needed, the administrator can opt to include a separator in the course code formula, which can help maintain consistency when importing training from an old system to the Cornerstone system. This field is optional, and no separator is selected by default. If separator has already been used while loading course codes prior to the feature activation by GTS, a validation message displays that reads, "Separator is already used and must be [X]."

To include a separator between the prefix, code, and suffix of a course code, select a character from the **Separator** drop-down menu. Available options include:

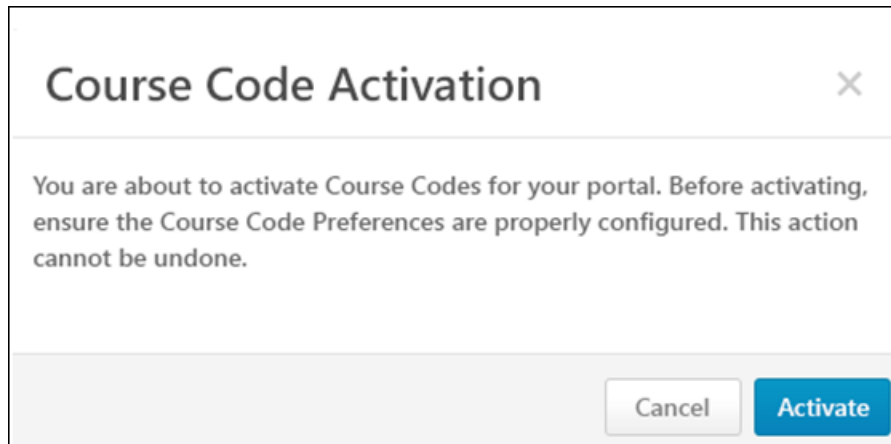
- > None
- > :
- > -
- > _
- > /
- > \
- > .

Note: *Once the course code has been activated in the portal by an administrator, the **Code Starting Value**, **Code Minimum Characters**, **Version Suffix**, and **Separator** options are no longer editable. If a change must be made, this can only be done via work order.*

Course Code Activation

The administrator can finalize the course code preferences they have selected and start auto-generating course codes in the portal by clicking the **ACTIVATE** button. Activating the course code preferences prohibits all administrators from making changes to the **Code Starting Value**, **Code Minimum Characters**, **Version Suffix**, and **Separator**. To activate course codes in your portal:

1. Check to ensure all course code preferences have been set as desired. Once course codes are activated, no changes may be made to course code preferences. Click the **ACTIVATE** button in the Course Code Activation section.
2. A pop-up window appears, stating, "You are about to activate Course Codes for your portal. Before activating, ensure the Course Code Preferences are properly configured. This action cannot be undone." Below this message, there are two options: **ACTIVATE** and **CANCEL**. Click the **ACTIVATE** button to finalize course code preferences and make course codes active in your portal.
3. The system will redirect you to the Learning Preferences page. If you access the Course Code Preferences page again, the preference fields on the page will no longer be editable.



Cancel

To discard any changes made to the Course Code Preferences page without saving and without activating course codes in the portal, click **CANCEL**. **Note:** *Once course codes have been activated, changes made to the Course Code Preferences page may not be canceled.*

Save

To save any changes made to the Course Code Preferences page, click **SAVE**. **Note:** *Saving changes made to the Course Code Preferences page does not automatically activate course codes in the portal.*

Auto Generate Learning Object Course Codes

Course codes are automatically generated for most learning object (LO) types on the backend. This action is triggered when an administrator saves a new LO.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Course Publisher	Grants access to LCMS Course Publisher, which enables upload and publishing of SCORM and AICC compliant online courses, created either in the LCMS Course Builder, or from a third party course building tool. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator permission.	Learning - Administration
Curricula Admin - Manage	Grants ability to create new and edit/update existing curricula. This permission can be constrained by OU, User's OU, Provider, and User's LO Availability. This is an administrator permission.	Learning - Administration
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Materials Management	Grants ability to view the Material Administration page and create, edit, and copy materials. Once created, these "materials" can be managed like other learning objects via the course catalog. This permission can be constrained by OU, User's OU, and Provider. The constraints on this permission determine which materials the administrator is able to view, edit, copy, and create. This is an administrator permission.	Learning - Administration
Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. When adding users to a session in which the session roster is	Learning - Administration

	full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	
Social Learning Cohorts - Edit	Grants ability to access the Manage Cohorts page and to edit existing cohort learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Social Learning Programs - Edit	Grants ability to access the Manage Programs & Cohorts page and edit existing program learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Test Engine - Manage	Grants ability to create and edit/manage tests via the Test Engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

Create New Learning Object

When an administrator creates and saves a new LO in a portal with active course code preferences, an alpha-numeric LO ID code is automatically generated for the LO. This code adheres to the preferences set in Course Code Preferences, and no duplicate codes can be generated. Course codes are automatically generated for the following LO types:

- Certifications
- Curricula
- Events and Sessions
- Materials
- Online Courses
- Programs and Cohorts
- Tests
- Videos

Note: The course codes generated for learning objects are not visible to the administrator. Course codes are generated on the backend.

Copy Learning Object

If an administrator copies an existing learning object which supports course codes, a new course code is automatically generated for the LO copy. The course code generated for the copied LO will be unique. No duplicate course codes can be generated.

Course Catalog - Course Code Field

If course codes are active in the portal and the administrator has the permission to view course codes, a new **Course Code** field displays on the Course Catalog search page. The **Course Code** field can be used to quickly find a specific instance of training.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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. With the October '16 release, this permission enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission).	Learning - Administration
Course Code - View	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration

Course Code

By entering a unique course code into the new **Course Code** field on the Course Catalog search page and clicking the **SEARCH** button, administrators can find the specific learning object (LO) associated with that course code. The **Course Code** field can be used in conjunction with other Course Catalog fields if desired.

Certification Administration - Course Code

If course codes are active in the portal and the administrator has the permission to view course codes, a new **Course Code** field displays on the Certification Administration page. The **Course Code** field can be used to quickly find a specific certification.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Course Code - View	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration

Certification Administration

Manage Certifications

[Create a New Certification](#)
[Manage Families and Categories](#)

Certification Title
 Course Code
 Family
 Category
 All Languages
☐ Include inactive

(3 Results)

Title	Family	Category	Version	Language	Last Modified	Owner(s)	Status	Options
Customer Service Certification	Customer Service	Documentation	3.0	Chinese (Hong Kong SAR), Chinese (Simplified) ...	8/8/2012 8:00 PM	Moore, Tasha Mullen, Lori	Active	
Ethics Certification for Managers	Ethics	Ethics Simulation	5.0	English (US)	8/9/2012 10:41 AM	Lolley, Jon Moore, Tasha	Active	
General Customer Service	Customer Service	Documentation	1.0	English (US)	8/11/2012 4:09 PM	Moore, Tasha	Active	

Course Code

By entering a unique course code into the new **Course Code** field on the Certification Administration page and clicking the **SEARCH** button, administrators can find the specific certification associated with that course code. The **Course Code** field can be used in conjunction with other Certification Administration fields and filters if desired.

Note: To receive relevant results, at least the course code prefix must be entered into the **Course Code** field.

Create New Proxy Enrollment - Course Code

If course codes are active in the portal and the administrator has the permission to view course codes, a new **Course Code** field displays on the Create New Proxy Enrollment page. The **Course Code** field can be used to quickly find a specific learning object (LO) when creating a new proxy enrollment.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Code - View	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Proxy Enrollment - Standard, Dynamic, Recurring	Grants ability to create standard, dynamic or recurring proxy enrollment requests to assign training to users. This is an administrator permission. With the October '16 release, this permission also enables administrators to view the Proxy Enrollment widget on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission) and on the Course Console (in conjunction with the Course Catalog - View and Course Catalog - Update permissions).	Learning - Administration

Course Code

By entering a unique course code into the new **Course Code** field on the Create New Proxy Enrollment page and clicking the **SEARCH** button, administrators can find and select the specific learning object (LO) associated with that course code and add it to the proxy enrollment.

Note: To receive relevant results, at least the course code prefix must be entered into the **Course Code** field.

Manage Events and Sessions - Course Code

If course codes are active in the portal and the administrator has the permission to view course codes, a new **Course Code** field displays on the Manage Events & Sessions page when the *Search for All Sessions* option is selected. The **Course Code** field can be used to quickly find a specific session.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Code - View	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission. With the October '16 release, this permission also enables administrators to view the Prior ILT Sessions widget on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission).	Learning - Administration

Manage Events & Sessions

Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule new sessions.

Search All Sessions

☐ Search for all Events
 ☒ Search for all Sessions

☒ Tentative
 ☒ Approved
 ☐ Completed
 ☐ Cancelled

Session ID
 Course Code
 Locator Number

Location
 Instructor
 Vendor

Event Name
 Subject
 Start Date: to

Course Code

By entering a unique course code into the new **Course Code** field on the Manage Events & Sessions page and clicking the **SEARCH** button, administrators can find and select the specific session associated with that course code. The **Course Code** field only displays when the **Search for all Sessions** field is selected. Other search fields and filters may be used in conjunction with the **Course Code** field when searching for sessions.

Note: *To receive relevant results, at least the course code prefix must be entered into the **Course Code** field.*

Custom Reports - Course Code

Course codes can now be included in several types of custom reports. For selected reports, a new **Course Code** field is available from the Training section and can be added to a report, allowing administrators to track learning more effectively.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Code - View	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Custom Certification Report - Create	Grants ability to create and edit Custom Certification reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Direct Subordinates.	Reports - Analytics
Custom Certification Report - View	Grants ability to view results of Custom Certification reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Direct Subordinates.	Reports - Analytics
Custom Multi-Module Report - Create	Grants ability to create and edit custom Multi-Module reports. This permission works in conjunction with other Custom Report - Create permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Multi-Module Report - View	Grants ability to view results of custom Multi-Module reports created by self. This permission works in conjunction with other Custom Report - View permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Training Forms - Curricula Report - Create	Grants ability to create and edit custom Training Forms - Curricula reports.	Reports - Analytics
Custom Training Forms - Curricula Report - View	Grants ability to view custom Training Forms - Curricula reports.	Reports - Analytics
Custom Test Reports - Create	Grants ability to create and edit custom Test reports (Test Engine data). This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics

Custom Test Reports - View	Grants ability to view results of custom Test reports (Test Engine data) created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom Training Plan Report - Create	Grants ability to create and edit training plan (Training Demand Forecast) custom reports. This permission can be constrained by OU, User's OU, User, User's Direct Subordinates, and User Self and Subordinates.	Reports - Analytics
Custom Training Plan Report - View	Grants ability to view results of training plan (Training Demand Forecast) custom reports created by self or shared by others. This permission can be constrained by OU, User's OU, User, User's Direct Subordinates, and User Self and Subordinates.	Reports - Analytics
Custom Training Reports - Create	Grants ability to create and edit Custom Training (Catalog) reports. This permission can be constrained by Provider. Note: <i>When the constraint is set for the permission, users will only be able to view training data for the constrained providers.</i>	Reports - Analytics
Custom Training Reports - View	Grants ability to view results of Custom Training (Catalog) reports created by self or shared by others. This permission can be constrained by Provider. Note: <i>When the constraint is set for the permission, users will only be able to view training data for the constrained providers.</i>	Reports - Analytics
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) 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 Direct Subordinates.	Reports - Analytics
Custom Training Unit Distributor Reports - Manage	Grants access to view, create and edit Training Unit Distributor Report in Analytics, which displays training unit information for distributed training units. This permission can be constrained by User, User's OU, and User Self and Subordinates.	Reports - Analytics

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

Report Designer

Training Report 2016 [Close] [Save]

Drag and drop fields to the Preview table to build your report. Click the refresh button to update the data in the table after you make any changes.

Training Report [All Folders]

Fields

Show [Select options]

course

Training (10)

- T Course Code
- T Course Publication Created By
- Course Publication Creation Date
- Course Publication Published?
- T Course Publication Title

Custom Report

Field Filters | Sort | Summary | Sharing | Schedule | Delivery | Chart | Publish

* Type or drag a field here

[Refresh] Maximum number of records 5000 [Options] [Actions]

Course Code	* Type or drag a field here

Course Code

When the **Course Code** field is added to a custom report, the report output includes the specific course codes generated for all training that meets the report criteria. The **Course Code** field is available from the Training section and can be added to the following custom report types:

- Certification Report (only for learning objects (LOs) inside the certification; course codes for certifications themselves cannot currently be reported on).
- Compliance Report
- Evaluation Reports
- Multi-Module Report - Learning Module Training Section
- Training Report
- Training Plan Report
- Transcript Report
- Transaction Report

Partial Scoring for Multiple Choice/Multiple Answer Questions

Test Partial Scoring Overview

Prior to this enhancement, it was not possible to allow partial credit for partially correct answers to multiple choice/multiple answer test questions. Users were required to select all correct answers to receive credit.

With this enhancement, users can now receive partial credit for selecting some of the correct answers in a multiple choice/multiple answer question.

Use Cases

Chris is a Learning Administrator at Acme Corp. He is creating a new test for his organization, and some questions are the Multiple Choice/Multiple Answer response type. Chris would like learners to receive partial credit when they select some of the correct answers in a Multiple Choice/Multiple Answer question. To allow this feature, Chris selects the "Allow Partial Scoring" option when creating each Multiple Choice/Multiple Answer question. By allowing partial scoring for Multiple Choice/Multiple Answer test questions, Chris can better track learners' progress, and the learners will be more fairly rewarded for their knowledge.

Considerations

The new Allow Partial Scoring option only affects Test and Reporting functionality in the Learning module. Both Multiple Choice/Multiple Answer questions created in the past and the future are impacted by this enhancement.

This enhancement does not impact the following areas:

>Training Form Questions - Multiple Choice/Multiple Answer questions for training forms cannot be partially scored.

>Evaluation Questions - Multiple Choice/Multiple Answer questions for evaluations cannot be partially scored.

>Data Load Wizard - No options for the Allow Partial Scoring feature will be added to the Data Load Wizard for the July'16 release.

Implementation

This functionality is controlled by a backend setting which is enabled by default for clients using the Learning module. When this security object is enabled, the new administrator permission which enables administrators to allow partial scoring for Multiple Choice/Multiple Answer questions is available. The permission to allow partial scoring is added to the System Administrator security role by default and can be assigned to other system users by an administrator.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Test Partial Scoring - Manage	Grants ability to view and edit Partial Scoring for test engine Multiple Choice/Multiple Answer response type.	Learning - Administration
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The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Test Engine - Manage	Grants ability to create and edit/manage tests via the Test Engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Engine - Review	Grants ability to view details of user results for tests, via the test engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Engine - View	Grants ability to view existing tests in the test engine. Administrators with this permission can view each section of a test and print tests. Administrators with this permission can enter changes when viewing a test, but these changes cannot be saved. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Question Bank - Category	Grants ability to create and edit/update categories for classifying test engine questions. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Question Bank – Manage	Grants ability to create and edit/update test questions in the test engine question bank. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Question Bank – View	Grants ability to view the test engine question bank. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

Apply Partial Scoring

With permission to manage partial scoring, administrators can create Multiple Choice/Multiple Answer questions that use partial scoring from the Create Question page. The **Apply Partial Scoring** option is available for:

- Previously created Multiple Choice/Multiple Answer questions which have not yet been answered by a user in a test. **Note:** *If the question has been answered in a test, no changes can be made to the question. The **Apply Partial Scoring** option is visible in this case, but is not modifiable.*
- All new Multiple Choice/Multiple Answer questions.

To create a test question which allows partial scoring, go to **ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > TESTS**. Then, click on the **View Question Bank** link and click **Create New Question**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Test Partial Scoring - Manage	Grants ability to view and edit Partial Scoring for test engine Multiple Choice/Multiple Answer response type.	Learning - Administration
Test Question Bank - Category	Grants ability to create and edit/update categories for classifying test engine questions. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Question Bank – Manage	Grants ability to create and edit/update test questions in the test engine question bank. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Question Bank – View	Grants ability to view the test engine question bank. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

Create Question

Question Properties

Question:

Response Type: Multiple Choice/Multiple Answer ▾
 + Add Response Choice

Order	Response Choice	Correct	Always Display	Remove
1	<input type="text" value="Lock the computer."/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2	<input type="text" value="Close the laptop."/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	<input type="text" value="Shut down the computer."/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4	<input type="text" value="Instruct a coworker to watch the laptop."/>	<input type="checkbox"/>	<input type="checkbox"/>	

☐ Include 'None of the above'
☐ Include 'All of the above'
☐ Random answer selection: Show a subset of a large group of answers. (recommended)
 Enter the number of answer choices to always display for this question :

Apply Partial Scoring: ☒ Allow users to achieve partial points based on any correct answers. Incorrect answers will cause a partial point reduction.

Question Image or Video : Choose File No file chosen Upload

Browse and upload an image or video. Maximum file size is 50MB. Supported file types are .gif, .jpg, .bmp, .wmv, .flv, and .mp4.

Answer Explanation:

Category: General ×

Active: ☒

Cancel Submit

Apply Partial Scoring

Administrators with permission to create and manage partially scored questions have access to a new **Apply Partial Scoring** option on the Create Question page. This option is unselected by default. When the **Apply Partial Scoring** option is checked, users can receive partial credit based on the number of correct answers and the number of incorrect answers they select from the available response choices. **Note:** *If a learner selects incorrect answers, a partial point reduction is applied. Scores cannot be negative, and results are rounded down to the nearest integer.*

Considerations

The **Apply Partial Scoring** option does not display when creating or editing a question if:

- >The administrator creating a question does not have the permission to allow partial scoring. Without this permission, the **Apply Partial Scoring** option is not visible.
- >A response type other than Multiple Choice/Multiple Answer is selected for the question.

>An end user has already answered the question in a test. In this case, the **Apply Partial Scoring** option still appears on the Edit Question page, but it is not editable. If the question has not yet been answered in a test, the **Apply Partial Scoring** option is available.

Note: *When an administrator without the permission to allow partial scoring copies a Multiple Choice/Multiple Answer question, the **Allow Partial Scoring** option is automatically disabled in the copied question, regardless of whether the **Allow Partial Scoring** option was checked or unchecked for the original question.*

Partial Scoring Formula

Partial credit for Multiple Choice/Multiple Answer test questions using the **Apply Partial Scoring** option is calculated based on a formula which assumes all possible question answers carry the same weight. To calculate partial credit, the system uses the formula:

$$\frac{\text{Total Points Available} \times (\text{Correct Answers} - \text{Wrong Answers})}{\text{Total Correct Answers Set for Question}}$$


Example:

A Multiple Choice/Multiple Answer test question is worth 10 points. There are five possible answers, two of which are correct. A learner answers the question in a test and selects two correct answers and one incorrect answer. Using the formula, the system calculates the end user's score as five out of 10 points.

$$\frac{10 \times (2 - 1)}{2}$$

The final calculation for this example is five points out of a possible ten. The learner receives half credit for the question.

Review Test Questions

When a user provides some but not all of the correct answers for a Multiple Choice/Multiple Answer test question, the question is marked incorrect on the Review Test Questions page when the user reviews their test attempt. Partial credit is automatically calculated and applied, and the user only sees the final calculated score for the question. If the user is allowed to view the test attempt details, the correct answers are designated by a green check mark icon .

Considerations

>The Review Test Questions page does not display how many points were awarded for each correct answer.

>The Review Test Questions page does not display how many points were subtracted for each incorrect answer.

>Any partial credit received for a Multiple Choice/Multiple Answer question is automatically factored into the overall test score. No specific scoring details are visible to the end user.

Review Test Questions			
View: <input checked="" type="radio"/> All Questions <input type="radio"/> Correct Questions <input type="radio"/> Incorrect Questions <input checked="" type="checkbox"/> Show Details  Printable Version (2 Results)			
ID	Question	Correct	Answer Explanation
2885	When away from your device, how can you protect the data?	Incorrect	Locking the device is the appropriate way to protect its data.
	<input type="checkbox"/> Close the device. <input checked="" type="checkbox"/> Lock the device. <input type="checkbox"/> Ask a coworker to watch the device. <input checked="" type="checkbox"/> Shut down the device.		

Partial Scoring in Standard Reports

Standard reports which report on test and test question data now incorporate partial scoring into the report output. The following reports apply to this enhancement:

>Test Analysis Report - This report displays a summary of test data. The scoring data included in the report incorporates any partial credit received on Multiple Choice/Multiple Answer questions.

>Test Question Item Analysis Report - This report analyzes test question data. Any partial credit received by learners is factored into the Response % column of the report output.

Training Completion Page Enhancements

Training Completion 2.0 - Overview

Prior to this enhancement, the recently-designed Training Completion page helped users become more engaged with their learning by providing quick access to ratings and reviews functionality, along with any badges, points, or certificates they earned for completing a training item.

With this enhancement, an additional feature has been added to the Training Completion page to further promote engagement with training. After completing training that has an associated Training Completion page, users can now receive quick access to optional Level 1 and Level 2 evaluations attached to the training. Once all evaluations associated with the training have been completed, the Training Completion page also provides users with confirmation of the completion.

This enhancement helps administrators create a more interactive learning experience while also encouraging users to provide feedback for training.

Use Cases

Sarah is a manager at Acme Corporation who frequently takes training for her professional development.

Upon completing a training item, Sarah is directed to the Training Completion page, where she sees that she can now evaluate the course she just completed, in addition to being able to view badges, points, certificates, and other recommended training. The new easy access to the course evaluation encourages Sarah to complete the evaluation, which helps her company ensure they are providing their employees with the best training content possible.

When Sarah goes to review her completed transcript, she sees that each training item links to the Training Completion page by default, allowing her to easily review all the training and training-related activities she has accomplished.

Considerations

Only optional Level 1 and Level 2 post-test evaluations can be completed from the Training Completion page. Required pre-completion evaluations can cause the Evaluation Completed tile to display on the Training Completion page, but they must be launched from the transcript. The following evaluations may not be completed from the Training Completion Page and must be accessed from the transcript (or from a scheduled task, in the case of some Level 3 evaluations):

- Required Pre-Completion Evaluations
- Required Level 2 Pre-Test Evaluations
- Level 3 Pre-Completion Evaluations
- Level 3 Post-Completion Evaluations

Note: *The Evaluation Complete widget displays on the Training Completion page when all evaluations are complete, including evaluations which cannot be accessed from the Training Completion page.*

Implementation

This functionality is automatically enabled for all portals using Training Completion page functionality in the Learning module.

Permissions

The following existing 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
Level 1 Evaluation Administration	Grant Access to create and manage level 1 (reaction) evaluations associated with learning objects. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Level 1 Evaluations - Manage	Grants ability to create and edit Level 1 (Reaction) learning evaluations that can be associated with learning objects. When viewing Course Console, this permission also grants the ability to view the status of Level 1 Evaluations. This permission works in conjunction with the Level 1 Evaluation Administration, Course Catalog - Update, and Course Catalog - View permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Level 2 Evaluations - Manage	Grants ability to create and edit Level 2 learning evaluations that can be associated with learning objects. When viewing Course Console, this permission also grants the ability to view the status of Level 2 Evaluations. This permission works in conjunction with the Level 2 Evaluation Administration (knowledge and scored), Course Catalog - Update, and Course Catalog - View permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Training Completion Page - Evaluations

With this enhancement, three new widgets are enabled for the Training Completion page. These widgets alert the user to different types of evaluations associated with the training and provide confirmation that all evaluations have been completed. The new available widgets are:

>Evaluate This Training - Allows user to launch an optional Level 1 evaluation from the Training Completion page.

>Take Post-Test - Allows user to launch an optional Level 2 post-test evaluation from the Training Completion page.

>Evaluation Completed - Provides user with confirmation that all evaluations associated with a learning object (LO) have been completed.

Optional Level 1 and Level 2 evaluations can be completed from the Training Completion page. Level 1 and Level 2 evaluations that are required for learning object (LO) completion, as well as Level 2 pre-tests and Level 3 evaluations, must still be accessed from the transcript or scheduled tasks.

Sarah Villamaino / Transcript / Training Completion

Training Completion

You have completed **Power Consumption!**

You have earned:

- New Badge **Expert In Presentations**
- 55 Points [View Leaderboard](#)

What's next?

- [Edit My Rating](#) (4 stars)
- [Evaluate This Training](#)

You may also like:

Executive Leadership	Communication Skills	Personal Presence	Executive Skills
Curriculum	Curriculum	Curriculum	Material
★★★★★ (1)	☆☆☆☆☆ (0)	★★★★☆ (1)	★★★★★ (1)
\$295.99 (€148.00) 148.00...	\$0.00	\$0.00	\$0.00

Done

Evaluate This Training

If there is a Level 1 evaluation pending completion for a learning object (LO), when the user navigates to the Training Completion page for the LO, a clickable Evaluate This Training widget displays in the What's next section. Click the Evaluate This Training widget to access and complete the evaluation. **Note:** *The Evaluate This Training widget is not visible to the manager or any other users who have permission to view the user's Training Completion page.*

Considerations

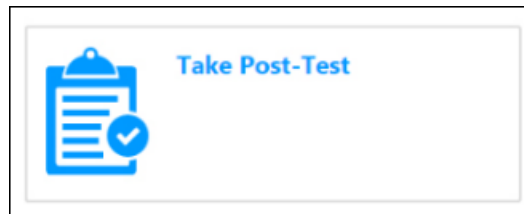
The Evaluate This Training widget does not display on the Training Completion page in the following circumstances:

- >The Level 1 evaluation is required for LO completion. Only optional evaluations can be accessed from the Training Completion page. Required evaluations must be accessed from the transcript.
- >There is no active Level 1 evaluation associated with the LO.
- >The Level 1 evaluation has expired.
- >The evaluation is a Level 2 post-test. In this case, a Take Post-Test widget displays instead.
- >The evaluation has already been completed. In this case, an Evaluation Completed widget displays instead.

Take Post-Test

If a Level 2 evaluation post-test is associated with the LO, a Take Post Test widget appears in the What's next section of the Training Completion page. The user clicks this widget to launch and complete the post-test.

Note: *If a Level 1 evaluation is also associated with the LO, the Level 1 evaluation must be accessed from the Evaluate This Training widget and completed before the Evaluate This Training widget can be automatically replaced by the Take Post-Test widget.*



Considerations

The Take Post-Test widget does not display in the following circumstances:

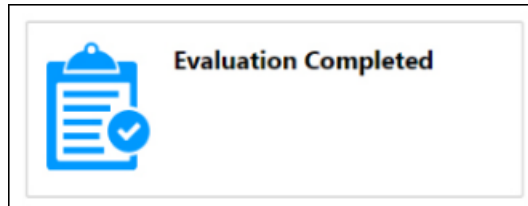
- >No Level 2 evaluation post-test is associated with the LO.
- >The Level 2 evaluation post-test has expired.
- >The Level 2 evaluation post-test is required. Only optional Level 2 evaluations can be linked to the Training Completion page.
- >The user's manager or another user with permission to view the user's Training Completion page accesses the Training Completion page. Only the user can see the Take Post-Test widget.

Evaluation Completed

After a user has completed all evaluations associated with an LO, the Evaluation Completed widget displays in the What's next section. This provides the user with

confirmation of their evaluation completions and helps them monitor their history of interaction with the training and its related actions. This widget is also visible to managers and other users with permission to view the Training Completion Page.

Note: *The Evaluation Completed widget is not clickable and does not provide links to any evaluation.*



The Evaluation Completed widget displays after the completion of all:

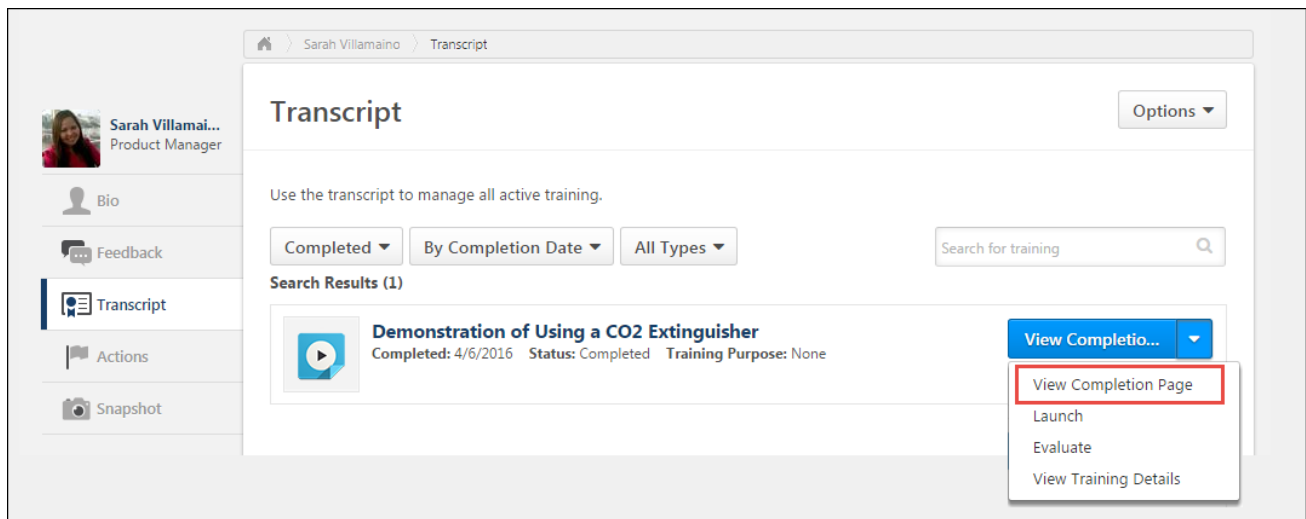
- >Level 1 evaluations (both optional and required)
- >Level 2 pre-tests and post-tests (both optional and required)
- >Level 3 evaluations (both optional and required)

Note: *All required evaluations, Level 2 pre-test evaluations, and Level 3 evaluations must be accessed from the transcript. These evaluation types are not accessible from the Training Completion page. They only play a role in causing the Evaluation Completed widget to display, after all evaluations associated with the LO have been completed.*

View Training Completion Page

When a user accesses their Completed transcript page, the default option in the options drop-down for each completed learning object (LO) with an associated Training Completion page is now **View Completion Page**. Clicking this option opens the Training Completion page, which displays any outstanding actions related to the LO. The page also displays the completion history for the LO. The **View Training Details** option and any other actions associated with the LO are still available in the options drop-down menu, below the **View Completion Page** option.

Note: *This enhancement only applies to the new transcript functionality. Old transcript functionality and the Curricula Player are not affected.*



Webex T31 Support

Webex T31 Support Overview

Prior to this enhancement, the WebEx Training Center Integration was not compatible with the WebEx Training Center upgrade released in March 2016. As a result, when upgrading WebEx Training Centers, virtual instructor-led training (vILT) sessions could not be created, vILT instructors could not be added, and vILT training could not be launched from within the portal.

With this enhancement, organizations can now upgrade to the latest version of WebEx Training Center (version WBS31) without impacting the effectiveness of vILT functionality. The system is now compatible with the latest version of WebEx Training Center.

Considerations

This enhancement applies to portals that have vILT Events and Sessions functionality and the latest version of WebEx Training Center.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
ILT Preferences - Manage	Grants ability to configure a variety of default settings that apply to new instructor led training events and sessions. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Instructors - View	Allows user to see host ID and password for	Learning -

VILT Details	VILT site. This is an administrator permission.	Administration
VILT WebEx Extended Options : Set Defaults	Allow WebEx admin to set defaults options for WebEx extended options for the entire portal.	Learning - Administration

Upgrade to WebEx T31

WebEx Training Center may now be upgraded to the latest version without impacting the usability of virtual instructor-led training (vILT) functionality. No additional action is required by the client after upgrading the WebEx Training Center. The system is now compatible with this upgrade.

Web Service GetCertificationDetails (Update)

With this enhancement, the following fields are now included in the GetCertificationDetails (SOAP) web service response:

- Family - This displays the family associated with the certification.
- Category - This displays the category associated with the certification.

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.

Web Service Remove Certification (New)

With this enhancement, a new Remove Certification REST web service is now available. This web service can be used to remove certifications that are assigned to users.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
User ID	String	This is required. This is the ID of the user who is enrolled in the certification.
Title	String	This is required. This is the title of the certification that is being removed from the specified user.

Implementation

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

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

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

xAPI Tin Can on Transcript

xAPI Tin Can on Transcript - Overview

Prior to this enhancement, organizations using xAPI could track learning completed outside the Learning module using the Learning Record Store (LRS). This allowed users to record their outside learning experiences, but their system learning was recorded separately from outside learning.

With this enhancement, users will now be notified of new completed xAPI Learning Records by a notification at the top of the Transcript page in the Learning module. Learning Records recorded in xAPI will also display on the Completed page of the Transcript along with any learning objects (LOs) completed within the Learning module. This allows users and managers to view records of all learning in one place.

Use Cases

Michael is an employee at Acme Corporation. His organization recently integrated with xAPI (also known as Tin Can), which allows users to track external learning experiences through the learning management system.

Michael recently watched a video on Tech Crunch and recorded this learning experience in the Learning Record Store (LRS). When Michael navigates to his Transcript in the Learning module, a new notification displays, saying that he has new completed xAPI learning experiences.

When Michael navigates to the Completed page of his transcript, his LRS learning records display alongside the training he completed in the Learning module. His transcript now provides a cohesive view of all his learning, completed both inside and outside the Learning module.

Considerations

This enhancement is **not** incorporated into the following areas:

- Custom Reports - Learning record data cannot be reported on using Custom Reports functionality.
- Standard Reports - Learning record data cannot be reported on using Standard Reports functionality.
- View Training Details - There is no **View Training Details** link available for learning records on the transcript.
- Run Transcript Report - If a user or manager clicks the **Run Transcript Report** option from the transcript, learning records are not included in the report output.

Implementation

This functionality is automatically enabled via a security object for all portals using both the Learning module and the Learning Record Store.

Permissions

The following new permission applies to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
xAPI - View Learning Records on Transcript	Allows users to view xAPI Learning Records on the Transcript.	Learning

Learning Record Notification

After completing new learning records in the Learning Record Store, a notification displays at the top of the transcript page in the learning module to confirm that new learning records have been added to the Completed transcript.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
xAPI - View Learning Records on Transcript	Allows users to view xAPI Learning Records on the Transcript.	Learning

The screenshot shows the 'Transcript' page for a user named Sarah Villamaino, who is a Product Manager. A notification banner at the top states: '1 new Learning Record has been added to your Transcript. View'. Below the notification, there are filters for 'Active', 'By Date Added', and 'All Types', along with a search bar. The search results list three items: 'BPD 2016-01', 'Asphalt Field Certification Classroom Training(Starts 4/17/20...', and 'Welcome!! New Hire Curriculum'. Each item has a 'Launch' or 'View Training De...' button.

Learning Record Notification

The Learning Record notification displays the number of new learning records that have been added to the user's transcript. The notification also provides a **View** link, which users can click to be navigated to the Completed page of their transcript. The notification can be dismissed by either clicking the **View** link or by clicking the Close icon ✕.

Note: Only users viewing their own transcript can see the Learning Record notification. This notification does not display for managers or any other users with permission to view other users' transcripts.

Considerations

>The number of new learning records included in the notification is limited to unseen learning records that have been added to the transcript in the last 30 days.

>If a user dismisses the learning record notification, the notification will not appear again until new learning records have been added to the transcript.

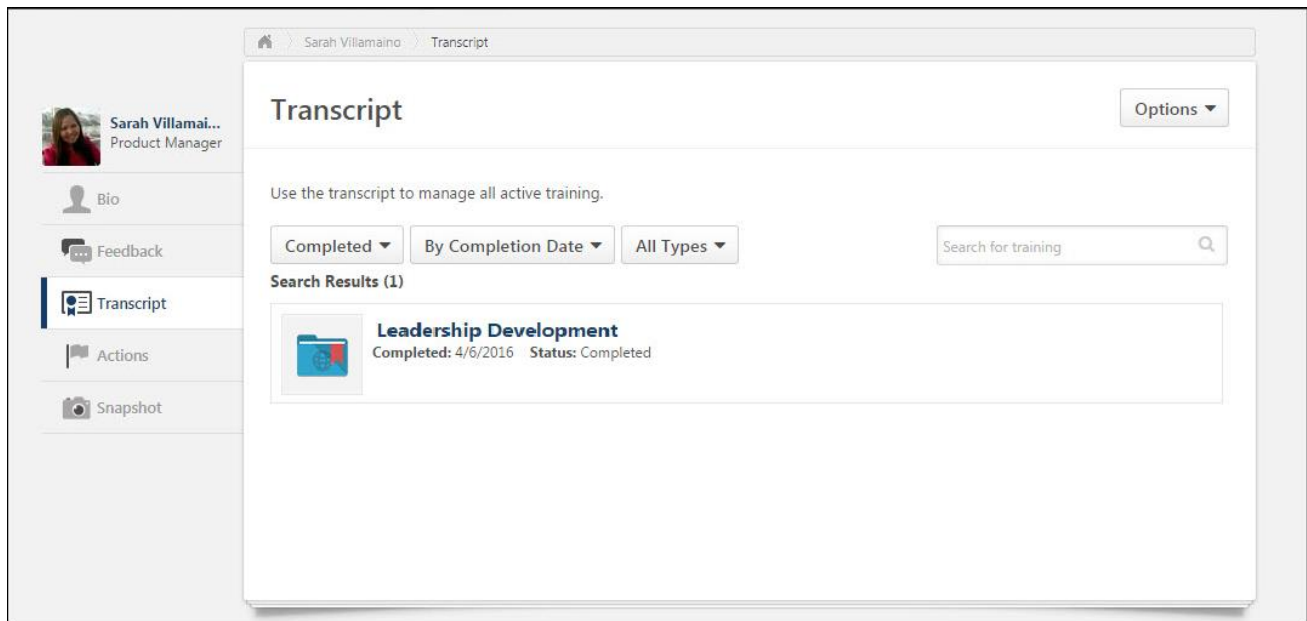
Completed Transcript - Learning Records

When a user records xAPI completed learning experiences in the Learning Record Store (LRS), the learning records are now automatically imported to the Completed page of their transcript in the Learning module. This allows users to view all their completed learning in one place. Only learning records considered complete by the Learning module display on the transcript.

In addition, Learning Record has been added as a sort option in the training type filter.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
xAPI - View Learning Records on Transcript	Allows users to view xAPI Learning Records on the Transcript.	Learning



Completed Transcript

Completed learning records display on the Completed page of the transcript with the following information:

- Title - This field displays the name of the xAPI learning record.
- Completed - This field displays the date the xAPI learning record was imported to the LRS.
- Status - This field displays the status of the xAPI learning record. **Note:** *The status for an xAPI learning record will always be set to Complete, because only completed learning records display on the transcript.*
- Learning Record Icon - An image of a blue and red folder displays next to xAPI learning records to indicate the training type.

Considerations

- No actions are available for xAPI learning records on the transcript, so no **Actions** drop-down option appears next to xAPI learning records on the Completed transcript page.
- No due dates display for xAPI learning records.
- No training purposes display for xAPI learning records.

Completion Criteria

In order for xAPI learning records to appear on the Completed page of a user's transcript, the learning records must display a status that equates to "complete" in the LRS. This prevents irrelevant learning records (such as failed or incomplete activities) from appearing on the Completed page of the transcript in the learning management system.

xAPI learning records must display one of the following verbs in the LRS in order to display on the Completed page of a user's transcript:

- Attended
- Completed
- Experienced
- Mastered
- Passed
- Read
- Watched
- Viewed

Sort by Training Type - Learning Record

Prior to this enhancement, it was possible to sort the Completed page of the transcript by training type and select a training type to view exclusively. With this enhancement, Learning Record has been added as a training type that can be selected as a filter on the Completed page of the transcript. To quickly find all learning records that have been added to the Completed transcript, choose **By Training Type** from the sort filter. From the **All Types** filter, select **Learning Records**.

Learning records can also be sorted using the following sort criteria:

- >Title
- >Status (always Completed)
- >Date Added (date the learning record was completed in the LRS)
- >Training Purpose (always None)
- >Due Date (always None)

Print Transcript or Export to PDF

When a user prints a transcript or exports a transcript to PDF, any completed learning records displaying on the Completed page of the transcript are included in the printable or PDF document, along with any learning objects completed in the Learning module.

Note: *The user must have the permission to view xAPI learning records on the transcript in order for learning records to be included in the printable and PDF versions of the transcript.*

Archived Transcript - Learning Records

If Transcript Preferences have been set by the administrator to automatically move training from the Completed transcript to the Archived transcript after a set amount of time, xAPI learning records are included in the transfer.

Data Merge - Learning Records

When data merges are performed for a user with any xAPI learning records on their multiple transcripts, the learning records are included in the data merge. After the data merge is complete, all learning records found on the user's transcripts are consolidated and display on the Completed page of the merged user's transcript.

Mobile

Mobile App Enhancements

Mobile App Enhancements

With this enhancement, the mobile application user interface is improved to achieve consistency across pages.

The following enhancements have been made:

- The Call and Email actions are removed from the Team and Connections lists.
- A gray header bar is added to all pages that do not have a header card.
- A score bar is added to the Do You Know game to indicate score results while progressing through the game.
- "Alert" is no longer included in the text of a notification.
- A Mobile icon appears to the right of every LO card that is mobile enabled on the Transcript.
- The Online Course icon appears consistently as a laptop icon within Transcript and search results.
- The Close and Submit icons that appear on certain pages are now consistent with the top menu bar.
- A white background is added to the Search bar.

Considerations

If the Do you Know game has more than 25 people, then the score bar is not displayed. However, the score counter is displayed.

Implementation





Testing is available 10 days prior to the release by adding /m to the end of the URL within a browser.

This functionality is automatically enabled for all organizations using the mobile application.

See Mobile Release Dates.

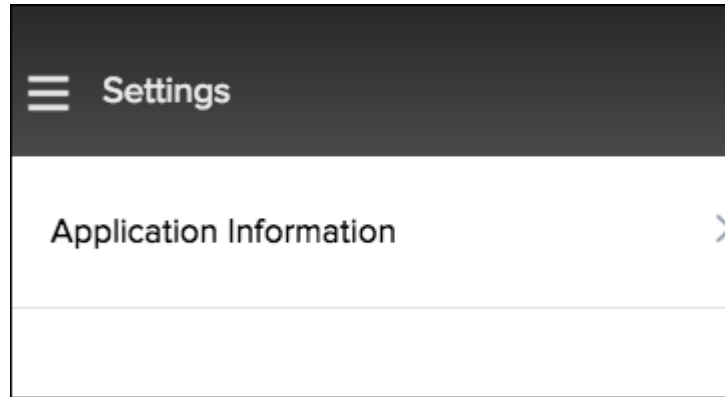
Team and Connections Lists

With this enhancement, the Call and Email options are removed from the Team and Connections lists to improve the appearance and usability of the list views.

	Curtis Simms Director	>
	Clark Cohen Manager	>
	Michelle Rogers Customer Service Representative	>
	Charlie Jackson Manager	>

Gray Header on Mobile Pages

With this enhancement, a gray header bar is added to all pages that do not have a header card. This creates a more consistent experience throughout the mobile application.

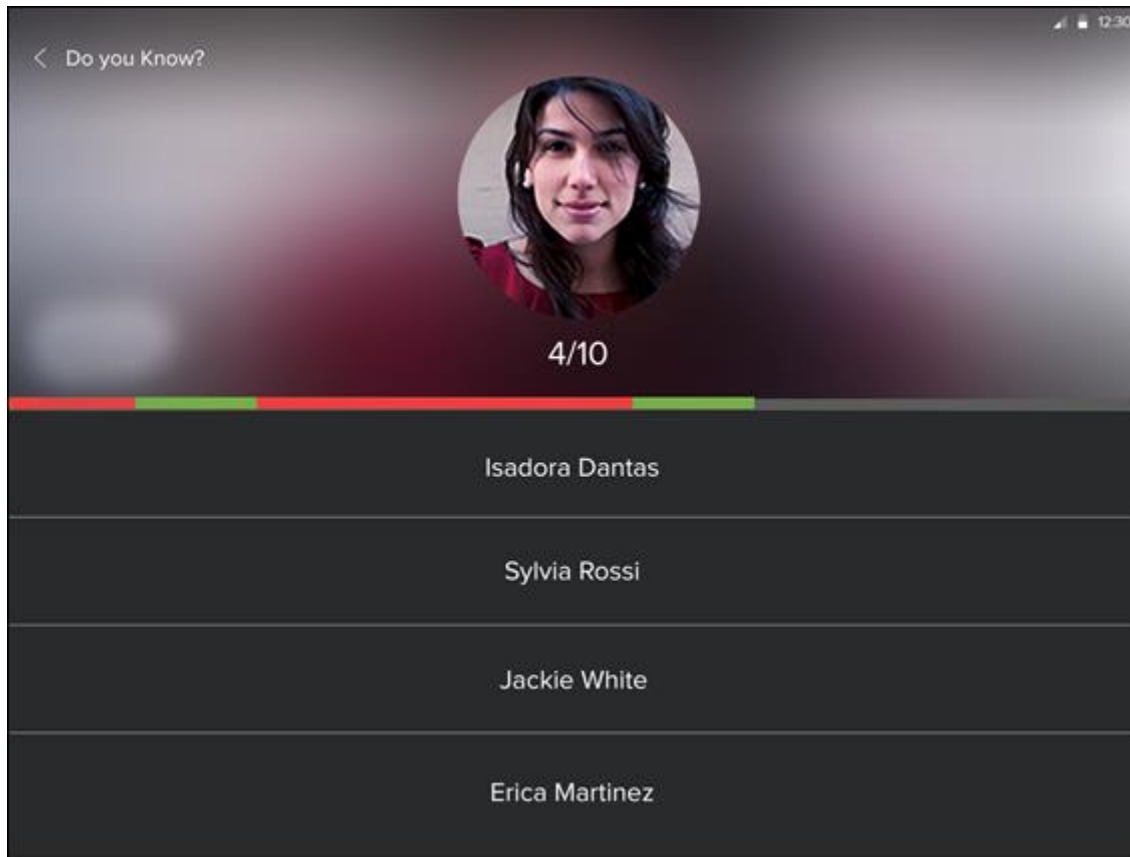


Do You Know Game Score Bar

Prior to this enhancement, the score bar for the Do You Know game was a semicircle.

With this enhancement, the score bar for the Do you Know game is a horizontal bar that utilizes the full width of the screen. This progress bar appears between the profile image and the buttons. Correct answers are displayed as green sections, and incorrect answers are displayed as red sections.

If the game has more than 25 people, then the score bar is not displayed. However, the score counter is displayed.









Clear Notification Text

With this enhancement, "alert" is no longer included in the text of a notification. This is to make the notification text clearer to users.

Mobile Icon for Mobile Enabled LOs







With this enhancement, a Mobile icon is now displayed next to all mobile-enabled learning objects (LOs) on a user's Transcript. This enables users to quickly identify all LOs that can be completed via the mobile application.

	Customer Service: Career Success Through Customer Loyalty Publications	>
	CSOD 101 Culture Online Class	 >
	Onboarding Curriculum for New Hires Curriculum	>
	Sequencing Mobile Curriculum	 >

Online Course Icon

Prior to this enhancement, online courses that were mobile enabled on a user's Transcript used a Phone icon. However, within Search, these courses used a Laptop icon.

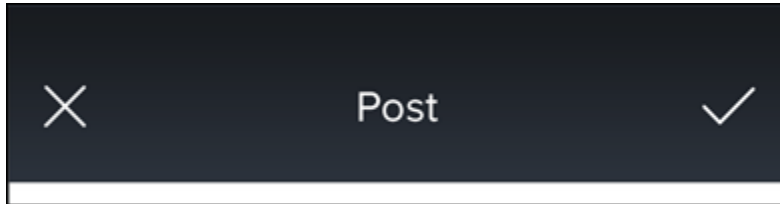
With this enhancement, online courses always use a Laptop icon to improve consistency. This icon is used regardless of whether the online course is mobile enabled.

	Customer Service: Career Success Through Customer Loyalty Publications	>
	CSOD 101 Culture Online Class	 >
	Onboarding Curriculum for New Hires Curriculum	>
	Sequencing Mobile Curriculum	 >

Close and Submit Icons

Prior to this enhancement, the Close and Submit icons that appear on certain pages did not match the icons that were used on the top menu bar.

With this enhancement, the Close and Submit icons are now consistent with the icons that are used on the top menu bar.



Mobile Dashboard

Mobile Dashboard Overview

With this enhancement, a new Dashboard is available within the mobile application. This new and optimized mobile page provides users with a faster and more intuitive navigation experience. Users now have a clear vision of how many actions they must take, how many courses they have that are due soon, and how many new posts are available on their Live Feed. Users can also navigate the app more effectively.

Use Cases

1. Anna has just signed in to the mobile application. It is the first time she is accessing the app, so she does not know where to navigate within the app.
2. Fortunately, her administrator has set the Dashboard as the default landing page, so Anna now sees widgets with helpful information. She knows she has three items waiting for her approval and two trainings due soon.
3. Anna selects the Approvals widget that indicates that she has "3 items to approve," and she is directed to her Approvals page. From there, she can quickly approve the trainings that her reports had requested.
4. As she navigates back to the Dashboard, she notices that now she has two new posts added to the Live Feed. By selecting that widget, she navigates to the Live Feed page, where she is able to engage with her colleagues' posts.

Considerations

The Dashboard is not available in offline mode.

Implementation

This functionality is automatically available for all organizations using the mobile application.

Organizations must enable the Mobile Dashboard via Mobile Preferences.

See Mobile Release Dates.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Search - Training	Grants ability to search for training via Global Search. If this permission is constrained to a specific OU, then that constraint is automatically applied within Global Search, including search filters and search results. This is an end user permission. The availability of this permission is controlled by a backend setting.	Learning
Mobile Preferences	Grants ability to manage Mobile Preferences. This permission cannot be constrained.	Mobile

Mobile Preferences

With this enhancement, administrators can now enable or disable a Dashboard for the mobile application. The Dashboard is a page that displays a set of widgets that provide quick access to information and actions.

- For organizations that are already using the mobile app, this option is unselected by default.
- For organizations that are not yet using the mobile application as of the July 2016 release, this option is selected by default.

To access Mobile Preferences, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > MOBILE**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Mobile Preferences	Grants ability to manage Mobile Preferences. This permission cannot be constrained.	Mobile

General

Enable Mobile Access:

☐ Allow users in this OU to access the Cornerstone Mobile app on their mobile or tablet device.

FEATURES

Include	Feature	Landing Page	Description
<input checked="" type="checkbox"/>	Dashboard	<input type="radio"/>	The dashboard is a set of widgets that provide info and actions for employees.
<input checked="" type="checkbox"/>	Activity	<input type="radio"/>	Display the user's live feed activity on the mobile navigation menu.
<input checked="" type="checkbox"/>	Team	<input checked="" type="radio"/>	Displays the user's team on the mobile navigation menu.
<input checked="" type="checkbox"/>	Connections	<input type="radio"/>	Shows the user's Connect contacts on the mobile navigation menu.
<input checked="" type="checkbox"/>	Transcript	<input type="radio"/>	Allow users to view their transcript and take mobile optimized courses on their mobile or tablet devices.
<input checked="" type="checkbox"/>	Observation Checklists	<input type="radio"/>	Allow observation checklists to be accessible on mobile or tablet devices.
<input checked="" type="checkbox"/>	Job Requisitions	<input type="radio"/>	Allow users to view job requisitions that have been assigned to them including new submissions and applicant profiles.
<input checked="" type="checkbox"/>	Approvals	<input type="radio"/>	Enable Mobile Approvals - Allow users to manage approvals from their mobile or tablet devices.
<input checked="" type="checkbox"/>	Social Feedback		Enable Mobile Feedback - Allow users to view and post feedback on their mobile device.
<input checked="" type="checkbox"/>	Game		Enable Mobile Game - Allow users to view and play the game on their mobile device.

MOBILE APPLICATION THEME

Corporate Color:

Select Color

Please select the primary mobile color for this OU. If no color is selected the parent color or Corporation default color will be used.

Upload corporate logo for title bar:

Browse...

The mobile logo image must be 144 x 88 pixels in size.

Select corporate logo for title bar:

Default

☐ 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

Restore Defaults

Cancel

Mobile Dashboard

With this enhancement, administrators can now enable or disable a Dashboard for the mobile application. The Dashboard is a page that displays a set of widgets that provide quick access to information and actions. The information displayed on the Dashboard is refreshed each time the user navigates to the page.

The Dashboard is set as the first item within the Main Menu navigation.

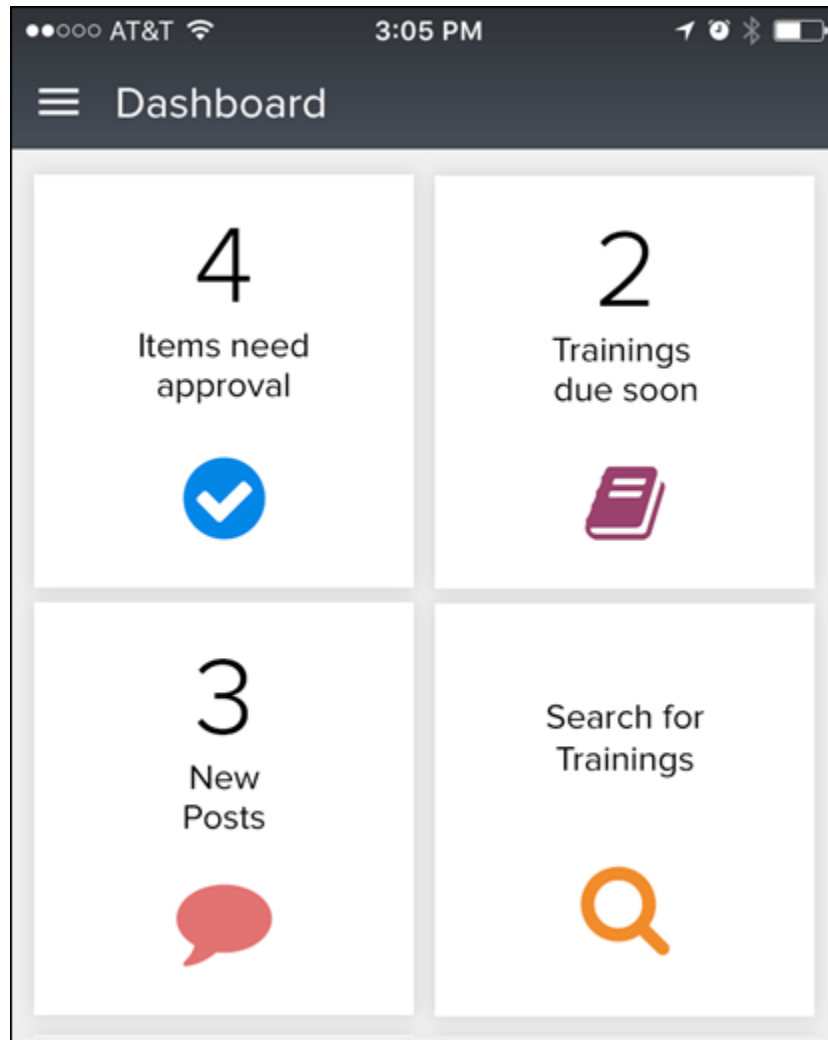
The Dashboard is not available in offline mode.

Permissions

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

The following widgets appear on the Dashboard:

- Approvals - This widget displays the number of items that need to be approved by the user. This widget appears for users who have permission to approve something, such as offer letters, requisitions, training, or goals. Users can select this widget to open the Approvals page.
- Training Due Soon - This widget displays the number of training items that are due within the next seven days.
- New Posts - This widget displays the number of posts that have been added to the user's Live Feed since the last time the user viewed the Live Feed via the mobile app. Users can select this widget to open the Activity page.
- Search Training - This widget enables users to quickly search for training. Selecting this widget opens the Search page with the Training tab selected. This widget appears for users who have permission to search for training.



Mobile Login with PIN

Mobile Login with PIN

With this enhancement, when a user logs in to the mobile application via SSO or company credentials for the first time, they are now prompted to register their device by creating a numeric PIN that will be used to log in to the app in the future. This enhancement is intended to facilitate easy login and to increase user engagement. In addition, helpful tooltips are now available throughout the login process to help users log in to the mobile application.

Considerations

This functionality is available to users using Android and iOS devices.


This functionality does not apply to mobile websites.

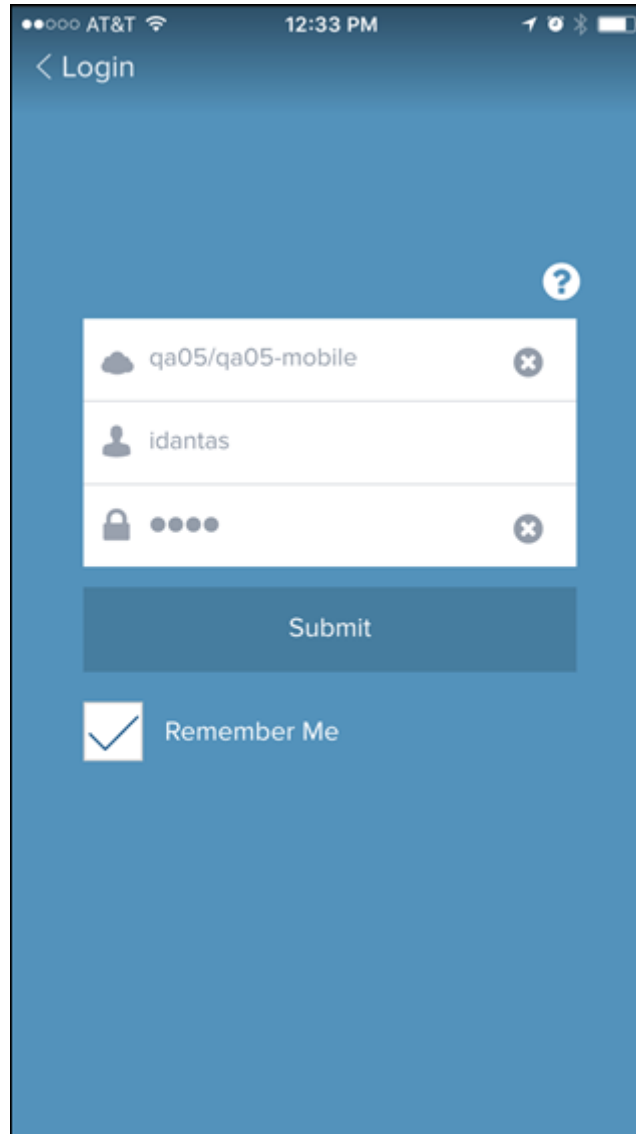
Implementation

This functionality is automatically available for all organizations using the mobile application and have enabled device registration.

See [Mobile Release Dates](#).

Login Troubleshooting

With this enhancement, troubleshooting information is now available when logging in to the mobile application. To access the troubleshooting information, select the Question Mark icon . This opens the Help page that corresponds with the current login screen (Login, SSO, Device Registration).



Login Help



Portal: Your company portal name can be found in the URL of the web app. For example, in the URL *xyzcompany.csod.com*, the portal name is *xyzcompany*.

Username: Your Cornerstone OnDemand username created at time of hire.

Password: Your Cornerstone OnDemand password created at time of hire.

If you experience challenges logging in, you may not have permission to access mobile or credentials entered are incorrect. Please contact your system admin for assistance.

Register Device

Many users are not aware that they can register their mobile device from within the mobile application.

With this enhancement, the mobile app prompts users to register their mobile device as soon as they are authenticated by entering their login credentials or using SSO. This enables users to quickly register their device.

Note: *This functionality is only available if the user has permission to manage their devices or if the user has already registered their device. Also, this functionality does not apply to the mobile website or when the device is not connected to the Internet.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
My Account Devices - Manage	Grants ability to access the Devices tab of My Account. The Devices tab enables users to register their mobile devices with the Cornerstone application. This permission cannot be constrained. This is an end user permission.	Mobile

Register Device

A unique alias is automatically generated based on the user's first name, last name, and device type.

Enter the following information to register the mobile device:

- **PIN** - Enter a 5-digit numeric pin that will be used to log in to the mobile app. Users are required to enter their PIN a second time to confirm that the PIN value is accurate. If the user enters a different PIN value the second time, then an error message is displayed and the user must begin the process of entering and re-entering the PIN value.

Skip Device Registration

To skip the device registration process, close the pop-up. This opens the default landing page.

If a user skips the device registration, the user is not prompted to register the device on subsequent logins. However, users can register a device from the Settings menu within the mobile app.

Skip >

Create a unique alias and a 5-digit pin to have faster access to the app, both online and offline.

Alias

PIN

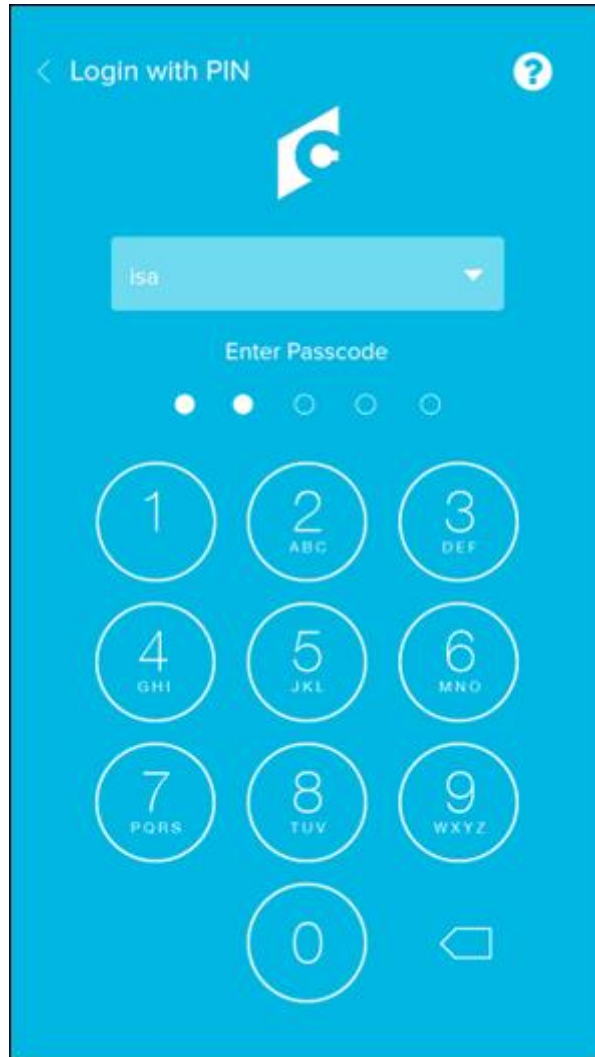
Register

PIN Entry

Prior to this enhancement, when setting a PIN for a device or entering a PIN, users were required to use the number keys on their mobile device's full keyboard display.

When registering a device and setting a PIN or entering a PIN, users are able to use a 10-digit keypad display. This enables users to more easily select the appropriate numbers for their PIN. In addition, users do not need to select a Submit button. The entry is automatically submitted once the fifth number is selected.

This applies when setting a PIN and when logging in with a PIN.



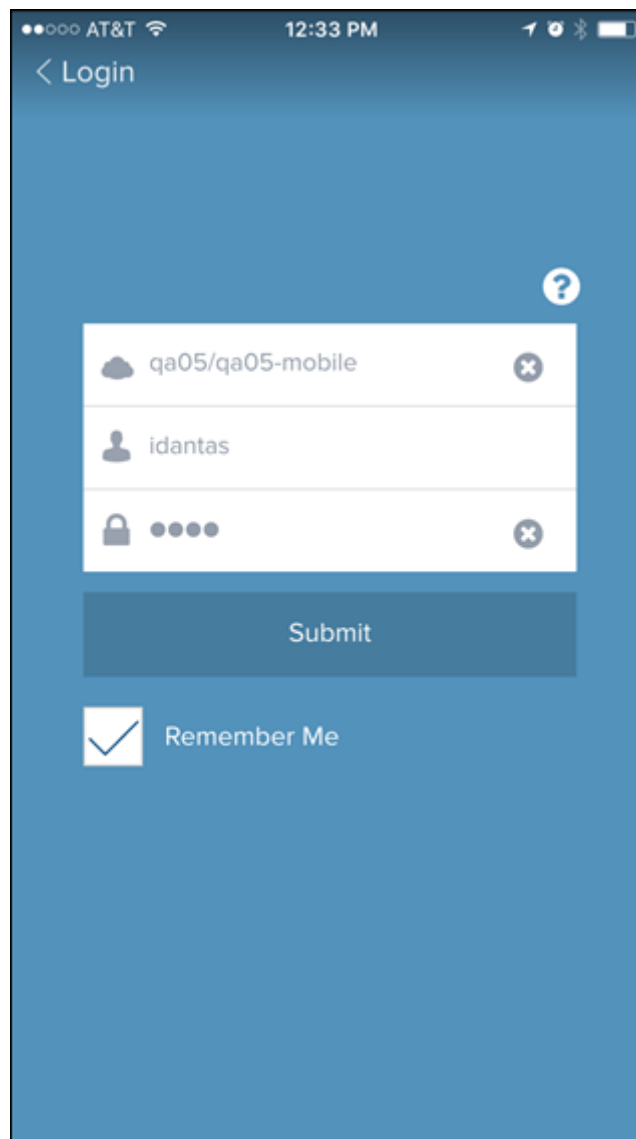
Login with Company Theme

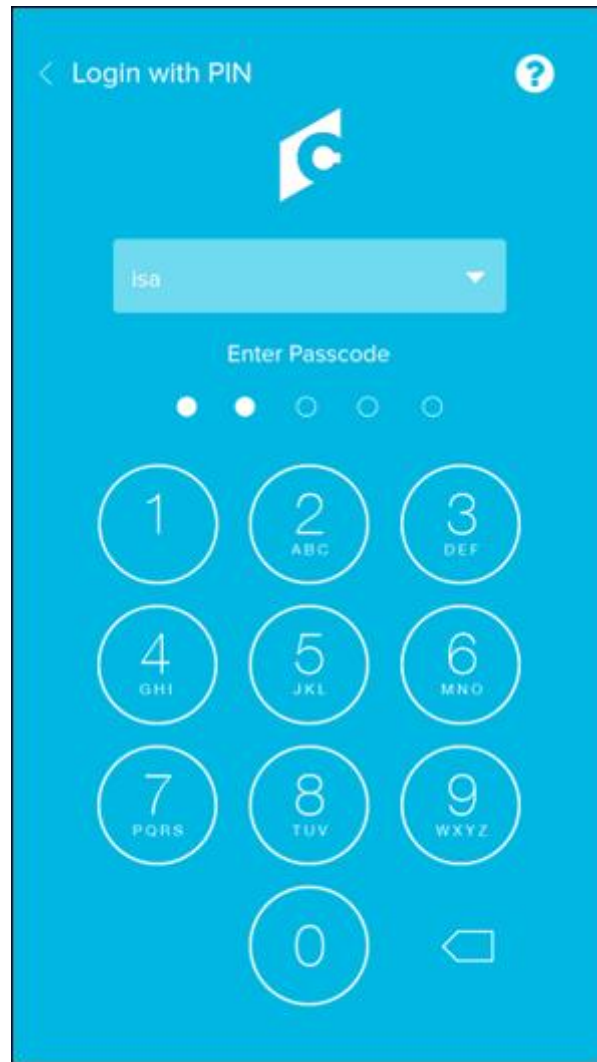
When logging in to the mobile application, there are two ways in which the user's company theme is applied to the application:

- User logs in using their credentials or SSO and selects the **Remember Me** option.
- User registers their device.

If users select the **Remember Me** option, the mobile application remembers the user's alias and allows them to quickly select their alias and enter their PIN in order to log in for future instances. Upon future login instances, the mobile app displays the user's company's corporate color and logo. This applies to all login pages.

Note: *This functionality is not available for the mobile browser.*





Performance

Feedback Preferences Page

Feedback Preferences Page Overview

The Feedback Preferences page allows administrators to customize rating scales used in feedback requests by division. The administrator can enable users to request feedback on goals, ask a question with a rating response, ask a question with a yes/no response, and add attachments. The rating scale can be customized from 1-15, and the ratings display can be configured to display ratings as numeric, text, or both.

Implementation

This functionality is automatically available for all organizations using the Performance module.

Upon release, the ability to request structured feedback on a goal via Universal Profile: Feedback is disabled by default. This can be enabled in Feedback Preferences.

Upon release, the default rating scale will be configured on a 1-5 scale. Also, the ratings are displayed as ratings and text by default. These settings can be modified in Feedback Preferences.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback Preferences - Manage	Enables administrator to access and edit the Feedback Preferences page. From this page, administrators can configure which options are available when users are requesting and providing feedback within the Universal Profile: Feedback page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile

The following existing permissions apply to this functionality:

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
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

Feedback Preferences

With this enhancement, a new Feedback Preferences page is now available.

The Feedback Preferences page enables administrators to configure which options are available when users are requesting and providing feedback within the Universal Profile: Feedback page.

To access the Feedback Preferences page, go to **ADMIN > TOOLS > CORE FUNCTIONS > UNIVERSAL PROFILE > FEEDBACK**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback Preferences - Manage	Enables administrator to access and edit the Feedback Preferences page. From this page, administrators can configure which options are available when users are requesting and providing feedback within the Universal Profile: Feedback page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile

General Preferences

This section enables administrators to determine which options are available to users when they are requesting feedback within the Universal Profile: Feedback page.

The following options are available:


- **Request structured feedback on goals** - When this option is selected, users have the option to request feedback on one of their non-shared personal goals in My Goals. Users are able to select a specific goal. Users can also add one yes/no or rating question to their request.
- **Submit question(s) with a Yes/No response** - When this option is selected, users have the option to add a question to their feedback request in which the user who responds to the question will provide either a Yes or No response.
- **Submit question(s) with a rating response** - When this option is selected, users have the option to add a question to their feedback request in which the user who responds to the question will provide a rating.
- **Add an attachment** - When this option is selected, users can add an attachment to their feedback request.

Ratings Display

Feedback ratings can be displayed as a numeric value, as text, or both. This section enables administrators to select how ratings are displayed to users who are providing and receiving feedback.

Overall Rating Scale

This section enables administrators to view and modify the rating scale that is used for feedback questions that use a rating response. The rating scale is displayed as it is currently configured. If the administrator modifies the rating scale, then this section reflects the modifications.

To edit the overall rating scale for feedback requests, click the Edit icon  next to the section heading. [See **Feedback Preferences - Edit Rating Scale** on page 318 for additional information.](#)

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.

Submit or Cancel

Click **SUBMIT** to submit any unsaved changes, or click **CANCEL** to discard any unsaved changes.

Feedback Preferences

Edit and manage Feedback Preferences

General Preferences

- ☒ Request structured feedback on goals
- ☒ Submit questions(s) with a Yes/No response
- ☒ Submit questions(s) with a rating response
- ☒ Add an attachment

Ratings Display

Display all ratings as ☐ Numeric ☐ Text ☒ Both

Overall Rating Scale

Rating	Title
1	Needs Improvement
2	Below Expectations
3	Meets Expectations
4	Exceeds Expectations
5	Outstanding

- ☐ 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

Feedback Preferences - Edit Rating Scale

With this enhancement, a new Feedback Preferences page is now available. Within this page, administrators can define the rating scale that may be used in feedback questions.

When requesting feedback from the Universal Profile: Feedback page, users may be able to request feedback in which the feedback provider selects a rating. Administrators are able to define the rating scale that is used for feedback questions that use a rating system.

To edit the overall rating scale for feedback requests, go to **ADMIN > TOOLS > CORE FUNCTIONS > UNIVERSAL PROFILE > FEEDBACK**. In the *Overall Rating Scale* section, click the Edit icon  next to the section heading.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback Preferences - Manage	Enables administrator to access and edit the Feedback Preferences page. From this page, administrators can configure which options are available when users are requesting and providing feedback within the Universal Profile: Feedback page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile

Language

If multiple languages are available for the portal, the rating scale titles can be localized by selecting the appropriate language from the **Language** drop-down menu. The titles for the administrator's default language must be entered prior to translating the titles for other languages.

When a rating scale is configured for the very first time, it inherits the language of that administrator and that language is considered to be the default language for the rating scale. *See the Rating Scale Default Language Use Case for additional information.*

Rating Scale Default Language Use Case

1. Sara is an administrator based in the United States where the default language is US - English and she is defining the rating scale for the very first time.
2. When Sara sets the scale from 1-5 and submits the rating scale, then US - English is configured as the default language for the rating scale.
3. Philippe is an administrator based in France where the default language is French - France, and he logs in to the system and updates the rating scale that is shared with Sara.
4. Philippe is required to change the language in the drop-down menu to French - France and update the text to his specification.
5. A few days later, Sara realizes that she needs to update the rating scale from 1-5 to 1-7 rating. She logs in, makes the change, adds the text for the two added ratings and submits the rating scale changes.

6. When Philippe logs in to update the rating scale, he sees two new blank lines added to the rating scale, which account for the ratings added by Sara that have no translations. Philippe is prompted to add translations to the newly added lines.

Scale

The scale determines how many rating options are available to feedback providers when responding to rating questions. This field is required, and the maximum value for this field is 15.

When this field is modified and the administrator moves the cursor from the field, the rating table is automatically updated based on the number of ratings to be used. Additional rows appear for every point on the defined scale.

Include N/A rating

When this option is selected, a scoreless value titled N/A is included in the rating scale. This rating option can be selected by feedback providers if the question does not apply to the user or if there is no other rating option that is applicable to the user.

Rating Table

This table displays all of the rating options and their text titles. The number of rating options that are available is dependent on the value entered in the **Scale** field.

In the **Title** fields, enter a text title for each rating value.

Save/Cancel

Select **SAVE** to commit any modifications to the rating scale, or select **CANCEL** to discard any unsaved changes.

When the rating scale is modified, the new rating scale settings are only applied to feedback requests that are created after the modifications are saved. Any existing feedback requests will continue to use the rating scale that was set when the feedback request was created. **Note:** *Changes to rating titles are immediately reflected in new and existing feedback requests.*

Define Rating Scale ×

Please define a rating scale. Editing this scale will not affect in progress feedback requests.

Language English (US) ▾ Scale: 1 - 5

☐ Include N/A rating

Rating	Title *
1	<input type="text" value="Needs Improvement"/>
2	<input type="text" value="Below Expectations"/>
3	<input type="text" value="Meets Expectations"/>
4	<input type="text" value="Exceeds Expectations"/>
5	<input type="text" value="Outstanding"/>

Cancel Save

Feedback - Feedback Settings

With this enhancement, a new Feedback Preferences page is now available. This page enables administrators to configure which options are available when users are requesting and providing feedback within the Universal Profile: Feedback page.

To request feedback, click the Feedback tab within Universal Profile. Then, place the cursor in 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

The following options are only available when requesting feedback if enabled in Feedback Preferences:

- Request structured feedback on goals - This includes the ability to ask one question.
- Submit question(s) with a Yes/No response
- Submit question(s) with a rating response
- Add an attachment to a request

When providing a rating response for a feedback request, the rating options and display settings are configured in Feedback Preferences.

The screenshot shows the 'Feedback' page for Jon Lolley, an Accountant. The page has a sidebar with navigation links: Bio, Feedback (selected), Transcript, Actions, and Snapshot. The main content area is titled 'Feedback' and includes a sub-header 'Use this page to provide informal, quick feedback to your peers across the organization.' Below this, there is a form to request feedback. The form includes a text input field with a placeholder 'e.g. I'd like to hear your thoughts on my latest project...', a dropdown menu for 'I would like feedback from...(e.g. John Smith)', a checkbox for 'Ask for anonymous feedback responses', and a 'Managers and me' dropdown. There are also icons for target, help, and attachment, and buttons for 'Cancel' and 'Post'.

Goals Enhancements

Goals Enhancements

With this enhancement, the following enhancements have been made to the Goals functionality:

- My Goals - The My Goals page now displays the user's overall progress towards their goals and the total weight of all of their goals. This enables users to quickly see the overall status of their goals.
- Snapshot - Goal Progress - Goals in Draft status are no longer included in goal progress within Snapshot.
- Goal Alignment - Users must have the Create Employee Goals - Align permission in order to search for goals by user when aligning their goal with another user's goal.
- View Goal History - The History pop-up for a goal now includes additional details, including overall goal, task, and target progress, task field details, and target field details.
- My Team - Manage Goal - When a manager selects a goal title from the My Team > Performance > Goals page, the manager is directed to a Manage Goals page that exists independent of Snapshot. This enables managers to manage their employees' goals from My Team if Snapshot is not enabled.

Implementation

Upon release, this functionality is automatically enabled for organizations using the Goals functionality.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Employee Goals - Align	When creating a goal for users other than self or subordinates, this permission allows users to search for goals by user when aligning the goal with another user's goal. Users with this permission can only search for and align their goals with users who are within their permission constraints. If a user does not have this permission, then the Search field is not available within the Alignment pop-up. 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
MyTeam Goals	Grants ability for manager (or others depending on constraints) to view, edit and manage progress of Goals for their direct and indirect reports via MyTeam and Talent Profile. This permission can be constrained by OU, User's OU, User's Direct Reports,	Performance

User, and User Self and Subordinates. The permission constraints determine for which users the Goals tab is available when viewing a user in My Team.

Note: *By design, for any My Team permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.*

Note: *If the user's permission is also constrained by User Self and Subordinates, then this overrides the User's Direct Reports constraint.*

My Goals - Total Weight and Overall Progress

With this enhancement, the My Goals page now displays the user's overall progress towards their goals and the total weight of all of their goals. This enables users to quickly see the overall status of their goals.

To view the My Goals page, go to **PERFORMANCE > GOALS**.

Note: Field names may be customizable by the system administrator, so your field names may vary.

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

Overall Goal Progress and Weight

The user's overall goal progress is displayed at the top of the page. This represents the user's total progress for all goals that are within the selected date range. The overall goal progress accounts for goal weights.

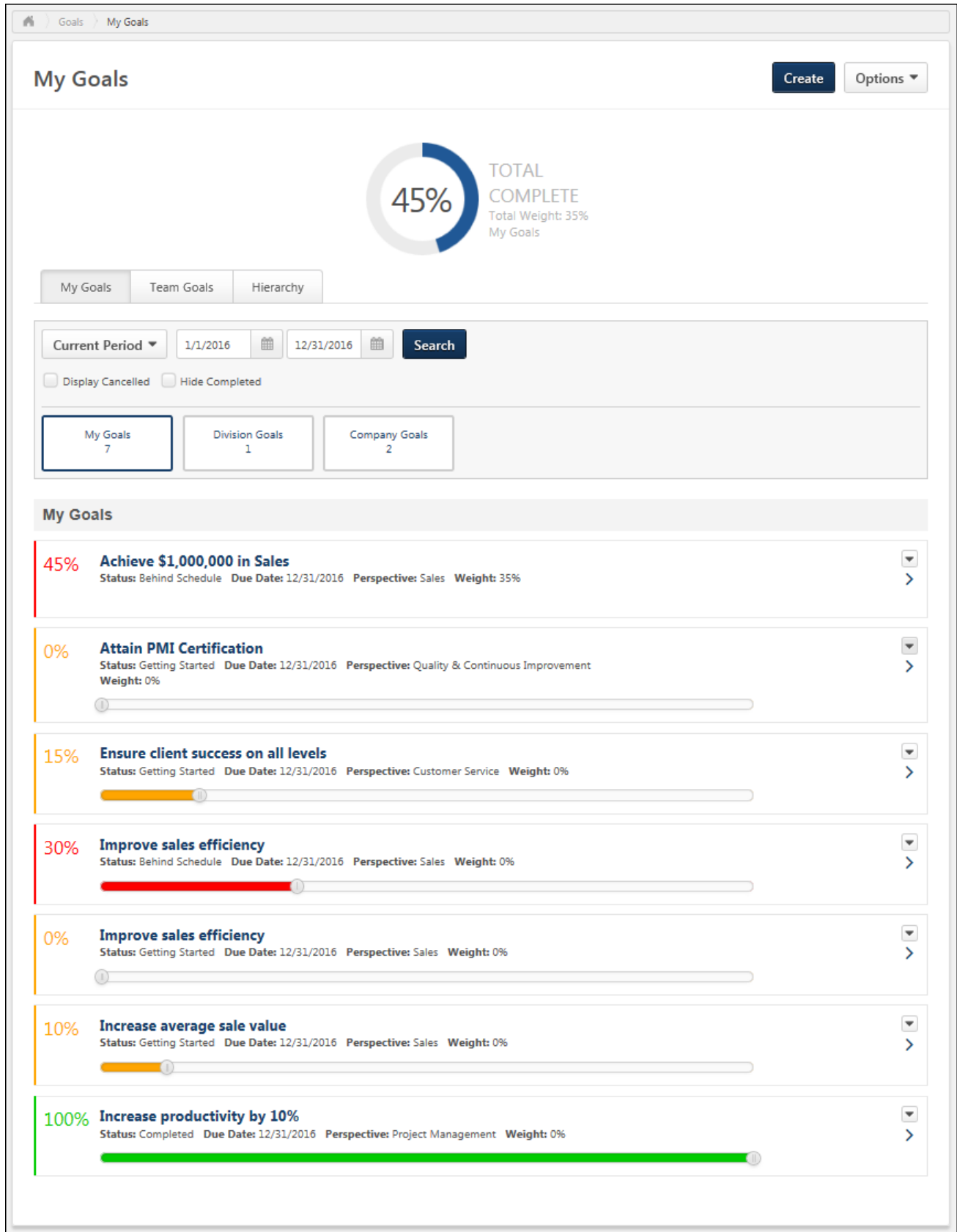
The Total Weight represents the cumulative weight of all goals that are within the selected date range.

The user's overall goal progress is always displayed based on the selected date range, even if the My Goals tab is not selected.

Goals in Draft, Deleted, or Cancelled status are not included in goal progress and total weight.

Note: The *Total Complete* section is only displayed when *Goal Progress* is enabled by administrators. *Total Weight* is only displayed when *Goal Weight* is enabled by administrators.

If *Goal Progress* is disabled, but *Goal Weight* is enabled, then the *Goal Weight* is displayed without the progress gauge.



Snapshot - Goal Progress

Prior to this enhancement, goal progress on the Snapshot page and the Snapshot Goals subpage included goals in Draft status.


With this enhancement, goals in Draft status are no longer included in goal progress within Snapshot.

Goal - Align with Another Goal

Prior to this enhancement, users were not required to have the Create Employee Goals - Align permission to search for goals by user when aligning their goal with another user's goal.

With this enhancement, users must have the Create Employee Goals - Align permission in order to search for goals by user when aligning their goal with another user's goal. Users with this permission can only search for and align their goals with users who are within their permission constraints. If a user does not have this permission, then the **Search** field is not available within the Alignment pop-up.

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 users to search for goals by user when aligning the goal with another user's goal. Users with this permission can only search for and align their goals with users who are within their permission constraints. If a user does not have this permission, then the Search field is not available within the Alignment pop-up. 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

Alignment

Select a goal to align with, or select none to create an independent goal.

	Title	Owner	Perspective	Due Date
<input type="radio"/>	Achieve \$1,000,000 in Sales	 Jon Lolley Accountant	Sales	12/31/2016
<input type="radio"/>	Attain PMI Certification	 Jon Lolley Accountant	Quality & Continuous Improvement	12/31/2016
<input type="radio"/>	Ensure client success on all levels	 Susan Baum Vice President, Operations	Customer Service	12/31/2016
<input type="radio"/>	Ensure client success on all levels	 Jon Lolley Accountant	Customer Service	12/31/2016
<input type="radio"/>	Improve sales efficiency	 Susan Baum Vice President, Operations	Sales	12/31/2016
<input type="radio"/>	Improve sales efficiency	 Jon Lolley Accountant	Sales	12/31/2016
<input type="radio"/>	Improve sales efficiency	 Jon Lolley Accountant	Sales	12/31/2016
<input type="radio"/>	Increase average sale value	 Jon Lolley Accountant	Sales	12/31/2016
<input type="radio"/>	Increase productivity by 10%	 Jon Lolley Accountant	Project Management	12/31/2016
<input type="radio"/>	Shared Division Goal	 Jon Lolley Accountant	Administration	12/31/2016

☐ Overwrite the following fields when aligning: Title, Description, Success Descriptors, Weight

Close

Align

Goal - View History

With this enhancement, the History pop-up for a goal now includes additional details. The following additional updates are now available within the History pop-up:

- Progress Updates - When task, target, or overall goal progress is updated, the modification is now included in the History pop-up. Overall goal progress updates are only tracked when a goal has no tasks and no targets.
- Task Details Updates - When the details of a task are updated, the modification is now included in the History pop-up. This includes modifications to the task description, start date, end date, or weight.
- Target Details Updates - When the details of a target are updated, the modification is now included in the History pop-up. This includes modifications to the target description, start date, end date, or weight.

As previously implemented, users can view additional details for the modification by clicking the Right arrow ➤ to the left of the Name column. This displays the specific fields that were modified, the previous value of the field, and the new value of the field.

As previously implemented, the History pop-up only displays edits and updates to the goal by default. History information related to tasks and targets is not displayed. To include history information related to tasks and targets, select the **Include Tasks and Targets** option. This option name and the availability of the option are dependent on the configuration of the Goals functionality.

The History pop-up can be viewed for a goal by selecting **View History** on the following pages:

- From the Options drop-down menu in the upper-right corner of the Edit Goal page.
- From the Options drop-down menu ▼ to the right of the goal on the My Goals page.
- From the Options drop-down menu ▼ to the right of the goal on the Team Goals page.
- From the Options drop-down menu ▼ to the right of the goal on the Snapshot Goals page.

History ×

	Name	Action	Updated By	Type	Date									
>	Achieve \$1,000,000 in Sales	results updated	Jon Lolley	Goals	6/20/2016 12:14 PM									
>	Achieve \$1,000,000 in Sales	results updated	Jon Lolley	Goals	6/20/2016 12:14 PM									
	Hold a seminar to attract new mid-market customers.	results updated	Jon Lolley	Tasks	6/20/2016 12:14 PM									
✓	Hold a seminar to attract new mid-market customers.	details modified	Jon Lolley	Tasks	6/20/2016 12:13 PM									
<table border="1"> <thead> <tr> <th>Field</th> <th>Changed From</th> <th>Changed To</th> </tr> </thead> <tbody> <tr> <td>Description</td> <td>Hold a seminar to attract new customers.</td> <td>Hold a seminar to attract new mid-market customers.</td> </tr> <tr> <td>Progress</td> <td>50</td> <td>55</td> </tr> </tbody> </table>						Field	Changed From	Changed To	Description	Hold a seminar to attract new customers.	Hold a seminar to attract new mid-market customers.	Progress	50	55
Field	Changed From	Changed To												
Description	Hold a seminar to attract new customers.	Hold a seminar to attract new mid-market customers.												
Progress	50	55												
✓	Achieve \$500,000 in sales from new mid-market.	details modified	Jon Lolley	Targets	6/20/2016 12:13 PM									
<table border="1"> <thead> <tr> <th>Field</th> <th>Changed From</th> <th>Changed To</th> </tr> </thead> <tbody> <tr> <td>Description</td> <td>Achieve \$500,000 in sales from new clients.</td> <td>Achieve \$500,000 in sales from new mid-market.</td> </tr> <tr> <td>Progress</td> <td>50</td> <td>35.7142868041992</td> </tr> </tbody> </table>						Field	Changed From	Changed To	Description	Achieve \$500,000 in sales from new clients.	Achieve \$500,000 in sales from new mid-market.	Progress	50	35.7142868041992
Field	Changed From	Changed To												
Description	Achieve \$500,000 in sales from new clients.	Achieve \$500,000 in sales from new mid-market.												
Progress	50	35.7142868041992												
	Achieve \$1,000,000 in Sales	details modified	Jon Lolley	Goals	6/20/2016 12:13 PM									
>	Achieve \$1,000,000 in Sales	results updated	Jon Lolley	Goals	1/14/2016 12:34 PM									
>	Achieve \$500,000 in sales from new mid-market.	details modified	Jon Lolley	Targets	1/14/2016 12:34 PM									

☒ Include Tasks and Targets Close

My Team - Manage Goal

Prior to this enhancement, when a manager selected a goal title from the My Team > Performance > Goals page, the manager was directed to the Manage Goals page within the Universal Profile - Snapshot page. For organizations that did not have Snapshot enabled, the option to manage a goal was not available on the My Team > Performance > Goals page.

With this enhancement, when a manager selects a goal title from the My Team > Performance > Goals page, the manager is directed to a Manage Goals page that exists independent of Snapshot. This enables managers to manage their employees' goals from My Team if Snapshot is not enabled.

This functionality applies to all organizations using the redesigned Goals functionality, including those that have Snapshot enabled.

To access My Team: Goals page, go to **MY TEAM > MY TEAM**. Select a subordinate. Click the Performance tab. Then, click the **Goals** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
MyTeam Goals	<p>Grants ability for manager (or others depending on constraints) to view, edit and manage progress of Goals for their direct and indirect reports via MyTeam and Talent Profile. This permission can be constrained by OU, User's OU, User's Direct Reports, User, and User Self and Subordinates. The permission constraints determine for which users the Goals tab is available when viewing a user in My Team.</p> <p>Note: By design, for any My Team permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.</p> <p>Note: If the user's permission is also constrained by User Self and Subordinates, then this overrides the User's Direct Reports constraint.</p>	Performance

When a manager selects a goal title on the My Team > Performance > Goals 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 Goals page.

My Team

My Team

My Team: Jon Lolley


☒ Show only my subordinate(s)




Jon Lolley

Accountant

01 - 02




Sara Andrews




Charles Cook


Chief Executive Of...




Profile




Tasks



Performance



Calendar



Comments

Goals | Dev Plans | Competencies | Reviews | Succession

Goals

Actions ▾

Achieve corporate sales targets

Progress: 25% Status: Getting Started Due Date: 12/31/2016

Attain PMI Certification

Progress: 0% Status: Getting Started Due Date: 12/31/2016

Improve sales efficiency

Progress: 0% Status: Getting Started Due Date: 12/31/2016

Iterative Goal Planning

Iterative Goal Planning Overview

With this enhancement, organizations can now employ a more continuous goal management process within a performance review task between employees and their reviewers.

- A new Performance Review Step Reopened email trigger can be leveraged to alert a reviewer when a performance review task step is re-opened.
- Reviewers can view the history of a goal within a Goal Planning section of a performance review task.
- Prior to this enhancement, commenting functionality was not available for Goal Planning performance review sections. With this enhancement, commenting can be enabled for Goal Planning performance review sections. This is done by enabling the Comment right for the section. **Note:** *Goal Planning performance review sections are only available for non-peer reviewers and non-360 degree reviewers.*
- Prior to this enhancement, administrators could not configure a Goal Planning performance review section to be view-only. With this enhancement, administrators can configure a Goal Planning performance review section to be view only. This is done by enabling the View Only right for the section. **Note:** *Goal Planning performance review sections are only available for non-peer reviewers and non-360 degree reviewers.*
- When a performance review step is reopened, Goal Planning sections reflect the latest goal planning information, including any goals that have been added or modified in later steps within the performance review task.

Considerations

The Goal Planning section allows only one comment per goal per user and does not support threading.

When goals are added in a Goal Planning section, those goals are not available in parallel performance review steps.

Implementation

Upon release, this functionality is automatically available to all organizations using the Performance module.

The ability to add comments within a Goal Planning section is disabled by default. System administrators must enable the Comments right for each Goal Planning section when creating or editing a performance review task.

Security

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 creating, editing	Core Administration

Manage	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
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

Performance Review - Create - Goal Planning Rights

Prior to this enhancement, when editing a performance review step, the only right that could be enabled for a Goal Planning section was the Edit right.

With this enhancement, Comment and View Only rights can now be enabled for a Goal Planning section.

- When the Comment right is enabled for a Goal Planning section within a review step, users who are assigned the step can add comments within the section.
- When the View Only right is enabled for a Goal Planning section within a review step, users who are assigned the step can view the Goal Planning section, including goals and comments that have been added. However, users cannot add goals or comments to the section.

To create a performance review task, go to **ADMIN > TOOLS > PERFORMANCE MANAGEMENT > TASKS**. Then, click the **Create a Performance Review Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

General

Review Workflow

Review Summary

Visibility

Confirm

Edit Review Step

Define Review Step

Step Title: Self Review

Assigned To: Self

☐ This step is optional. It will not affect the status of the overall review.

SECTIONS

Title	Version	Rights	Type	Previous Responses	Weight	Options
Current Goals Rating	2.0	<input checked="" type="checkbox"/> Comment <input checked="" type="checkbox"/> Rate <input checked="" type="checkbox"/> Select Goals <input checked="" type="checkbox"/> Weight <input type="checkbox"/> View Only	Goal Rating Section	Include last Reviews 0	100 %	
Annual Goal Planning	2.0	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Comment <input type="checkbox"/> View Only	Goal Planning Section		0 %	
Annual Sign-Off	3.0		Sign Off Section		0 %	
Total:					100%	

EMAIL ADMINISTRATION

☒ System Defaults - Use default emails based on settings and availability from email administration area. All emails related to this review step will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued. Note that for self-review steps, the employee will be treated as the employee and not the reviewer. Any emails directed towards the reviewer will be ignored for these steps.

☐ Custom Emails - All emails related to this review step may be customized. By default, triggers related to this step will be copied from the main email administration area. All emails sent related to this step will be sent based on the custom templates below. Changes made to the custom step emails will only apply to emails that have not yet been queued. Note that for self-review steps, the employee will be treated as the employee and not the reviewer. Any emails directed towards the reviewer will be ignored for these steps.

☐ No Emails - No emails will be sent in association with this review step. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

Save

Cancel

Performance Review - Create - Preview Comments

With this enhancement, Comment and View Only rights can now be enabled for a Goal Planning section.

When an administrator is creating a performance review task that contains a Goal Planning section and the Comment right is enabled for the section, if the administrator previews the performance review task on the Confirm step, the **Comments** field appears in the preview. This enables administrators to clearly see that a **Comments** field will appear in the Goal Planning section of the performance review task when the Comment right is enabled for the section.

To create a performance review task, go to **ADMIN > TOOLS > PERFORMANCE MANAGEMENT > TASKS**. Then, click the **Create a Performance Review Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

Performance Review Task - Confirm Step with Preview Option

General
Review Workflow
Review Summary
Visibility
Confirm

Define Performance Review Task

Confirm

This task has been started by a user. Only partial edit is allowed for this task.

Task Title: 360 Review

Description: Review of goal progress.

Assignment Period: 6/17/2016 - 6/18/2016

Expiration Date: 6/20/2016

Assignment: at start of task period

Availability: Nicholson, Nia
Morales, Marco

Review Period Start Date: 6/17/2016

Review Period Duration: 6/17/2016 - 7/1/2016

REVIEW PROCESS

Self Review
Due: 1 days after start
Assigned To: Self

Manager Review
Due: 1 days after start
Assigned To: Manager

Preview Preview

Annual Goal Planning (2.0) Annual Goal Planning (2.0)

« Back Cancel Save

Performance Review Task - Preview Goal Planning Section

Overview

360° Performance Re...

Summary

360° Performance Re...

Goal Planning - VISIBLE to reviewee

Options ▾

Clement Lee

1/1/2016 - 12/31/2016

0%

360° Performance Review Goal Planning Section

Add Goals

Please choose goals for Clement Lee to achieve during the specified time period.

IGP - Goal Comments will be added

New - Please Review

IGP - Goal Comments will be added

Progress: 0%

Status: In Progress

Start Date: 1/1/2017

Due Date: 12/31/2017

more...

Comments:

B I S U

1 2 3 4 5 6 7 8 9 10

ABC

Back

Save and Exit

Save and Continue

Performance Review - Goal Planning - Reopened Steps

With this enhancement, when a performance review step is reopened, Goal Planning sections reflect the latest goal planning information, including any goals that have been added or modified in later steps within the performance review task.

Once modifications are made to the Goal Planning section and this section is saved, these updates are reflected in reopened steps even if the reviewer does not complete their step. However, goals added by parallel step owners are never visible to reviewers in parallel steps.

Use Case

1. Frank is a sales representative at Acme Corp., and he recently completed his annual performance review, which contained a Goal Planning section.
2. Frank's manager completes the Manager Review step in the performance review task and adds two new goals to Frank's Goal Planning section.
3. Frank's manager wants Frank to review the newly added goals before the performance review task is complete, so he reopens Frank's performance review step.
4. Frank opens the Goal Planning section of his performance review and sees the two goals that his manager added. Frank is able to make edits to the newly added goals prior to submitting his performance review.


Performance Review - Goal Planning - Comments

Prior to this enhancement, reviewers could never add comments to a Goal Planning section.

With this enhancement, depending on the configuration of the Goal Planning section, reviewers may have the ability to add comments to a Goal Planning section. When commenting is enabled, reviewers can add a comment for each goal. This enables a user and manager to have discussions regarding future goals within the Goal Planning section.

The Goal Planning section allows only one comment per goal per user and does not support threading.

The character limit for comment fields is 10,000.

- To check the spelling of the text box contents, click the ABC icon  in the text box toolbar. This opens the Spell Checker pop-up.
- If you have a need to copy and paste content into a performance review, please be sure to right-click the field into which you are pasting the content, and select the "Paste" option. You can also perform the same action by pressing [Ctrl]+[Shift]+[V]. This will ensure any formatting HTML does not get inserted into the text.

When adding a comment, an HTML white list is used for the **Comments** field. Only certain HTML tags will be rendered. All other tags will not be rendered and the tags will display as text. [See *HTML Whitelist for additional information*](#).

If a non-peer reviewer (manager, indirect manager, custom relationship, or self) adds comments and saves the performance review task, then the reviewer's comments are visible to other reviewers. If a reviewee is completing a self review after another non-peer reviewer has added comments and saved their review, then the reviewee can view the other reviewer's comments. This applies if a self review step is reopened.

Overview


360° Performance Re...

Summary

360° Performance Re...

Goal Planning

Options ▾



Clement Lee
 1/1/2016 - 12/31/2016

0%

360° Performance Review Goal Planning Section

Add Goals

Please choose goals for Clement Lee to achieve during the specified time period.

IGP - Goal Comments will be added ▾


New – Please Review

IGP - Goal Comments will be added






Progress: 0%

Status: In Progress
Start Date: 1/1/2017
Due Date: 12/31/2017
more...

Comments:



Emad Radwan (Manager)
 Hey Clement. Might be a good idea for you to add a few tasks or targets to this goal

B I S U |   |   | 

Thanks Emad. Those are some great points! I've added a few tasks / targets. Let me know what you think!


Back

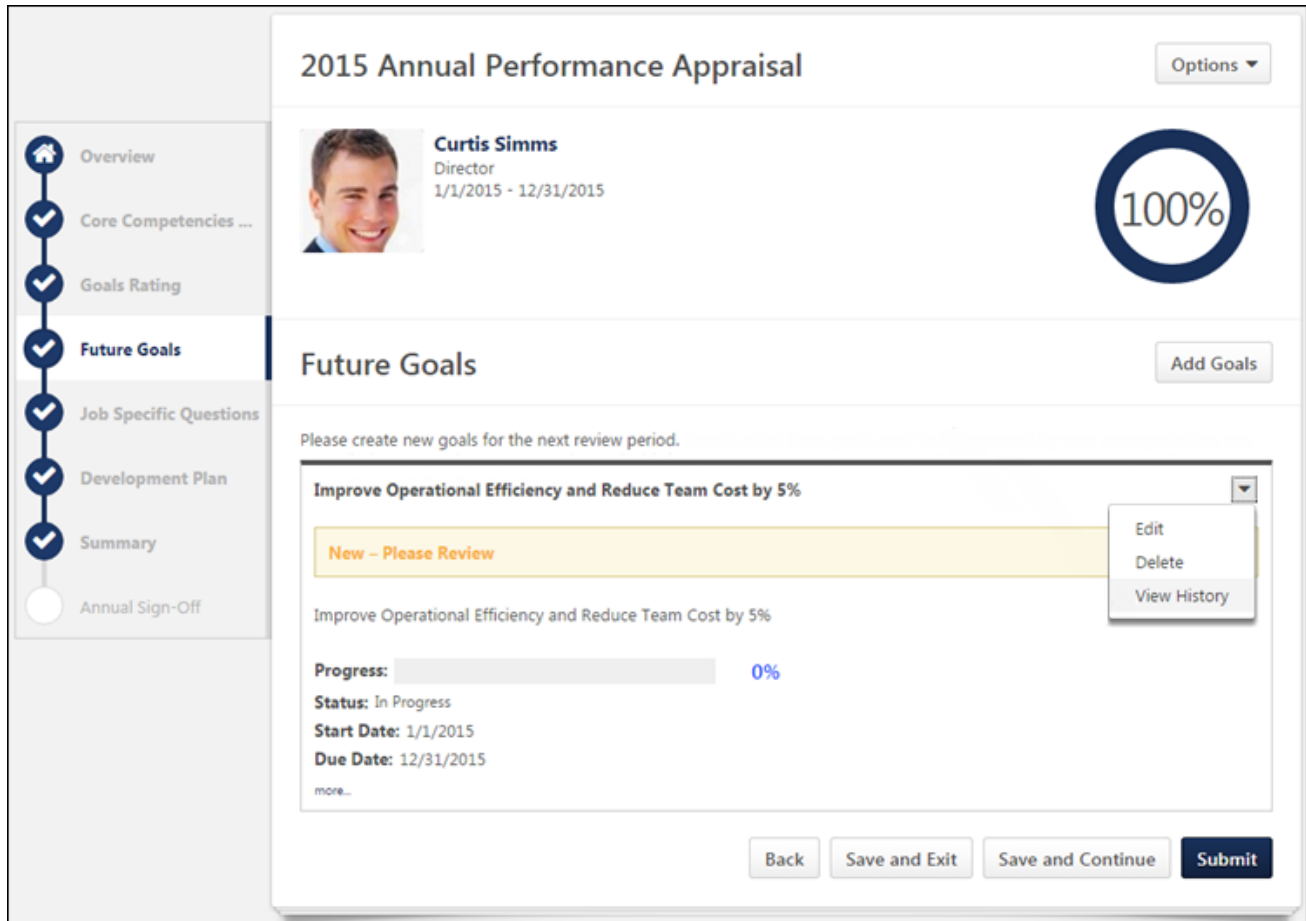
Save and Exit

Save and Continue

Performance Review - Goal Planning - View History

With this enhancement, reviewers can view the history of a goal within the Goal Planning section of a performance review task. This enables reviewers to see what updates have been made to a goal. For example, if a manager asks their subordinate to make changes to a goal, then this functionality enables the manager to view what changes were made.

To view the history of a goal, click the Options drop-down icon  to the right of the goal title. Then, select **View History**. This opens the History pop-up for the goal. [See Goal - View History](#).



The screenshot displays the '2015 Annual Performance Appraisal' interface. On the left is a navigation sidebar with icons and labels for Overview, Core Competencies, Goals Rating, Future Goals (selected), Job Specific Questions, Development Plan, Summary, and Annual Sign-Off. The main content area is titled 'Future Goals' and includes an 'Add Goals' button. It instructs the user to 'Please create new goals for the next review period.' A goal titled 'Improve Operational Efficiency and Reduce Team Cost by 5%' is shown with a status of 'New - Please Review'. A context menu is open next to the goal title, showing options: Edit, Delete, and View History. Below the goal title, it shows 'Progress: 0%', 'Status: In Progress', 'Start Date: 1/1/2015', and 'Due Date: 12/31/2015'. At the bottom are buttons for Back, Save and Exit, Save and Continue, and Submit. A circular progress indicator in the top right shows '100%'.

Performance Review Step Reopened Email Trigger

With this enhancement, a Performance Review Step Reopened email trigger is now available. This email is triggered when a performance review step is reopened in order to alert or remind the user that a performance step has been reopened. When configured, this email is triggered any time a step is reopened, whether it is done by a manager or administrator. This email can be sent to Reviewee, Reviewee's Direct Manager, Reviewee's Indirect Manager, Reviewer, or a specific user.

The REVIEW.REOPENED.STEP.DUE.DATE email tag displays the due date of the performance review step that is reopened. If no due date is defined for the step, then "No Due Date Defined" is displayed.

The system verifies that the review step is still due prior to triggering the email, so if the review step is no longer due, then this email is not triggered.

To access Email Administration, go to **ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT**.

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

Performance Review Step Assigned Email Trigger

With this enhancement, the Performance Review Step Assigned email trigger is no longer triggered when a performance review step is reopened. This enables organizations to utilize the new Performance Review Step Reopened email trigger to more clearly distinguish between a review step being reopened versus a new review step being assigned.

As a result, the REOPEN.STEP.COMMENT email tag is no longer available for this email trigger.

To access Email Administration, go to **ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT**.

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

Performance Review PDF

With this enhancement, depending on the configuration of the Goal Planning section, reviewers may have the ability to add comments to a Goal Planning section.

In order to support this enhancement, comments that are added within a Goal Planning section are available within the performance review PDF.

Structured Feedback: Goals

Structured Feedback: Goals

With this enhancement, employees can request structured feedback by adding a goal to their feedback request and asking one question, which can prompt a yes/no or rating response.

When a user is viewing a feedback request that is mapped to a goal, the basic details of the goal are displayed within the request. This enables the feedback provider to view the details and progress of the goal and use this information to help provide feedback. The feedback provider can expand the goal display to view specific goal details, like task and target information, start date, target date, progress, etc.

Considerations

When a goal is added to a feedback request, the request displays the details and progress of the goal as it existed at the moment the feedback request is posted. If the details of the goal are modified or if progress is updated after the request is posted, then these updates will not be reflected in the feedback request. This behavior is intended to allow feedback providers to see the goal details and progress at the time the feedback was requested.

Implementation

This functionality is automatically available for all organizations using the Performance module.

Upon release, the ability to request structured feedback on a goal via Universal Profile: Feedback is disabled by default. This can be enabled in Feedback Preferences.

Upon release, the default rating scale that is used for rating questions is 1-5. Also, the ratings are displayed as ratings and text by default. These values can be modified in Feedback Preferences. [See Feedback Preferences](#) on page 315 *for additional information*.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback Preferences - Manage	Enables administrator to access and edit the Feedback Preferences page. From this page, administrators can configure which options are available when users are requesting and providing feedback within the Universal Profile: Feedback page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Universal Profile

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Feedback -	Enables user to request feedback from the Feedback page of their	Universal

Request	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.	Profile
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
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

Feedback - Request Feedback for Goal

With this enhancement, users can now map a feedback request to a specific goal. This enables users to solicit feedback that is directly related to a goal.

Note: *When a goal is added to a feedback request, the request displays the details and progress of the goal as it existed at the moment the feedback request is posted. If the details of the goal are modified or if progress is updated after the request is posted, then these updates will not be reflected in the feedback request. This behavior is intended to allow feedback providers to see the goal details and progress at the time the feedback was requested.*

To request feedback, click the Feedback tab within Universal Profile. Then, place the cursor in 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
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

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Feedback Request Notification	This email can be configured as a notification and is triggered when an employee requests feedback from their Feedback page. This email can be sent to a specific user, the Feedback Request Recipient, the Feedback Requester, or the Feedback Requester's Manager.	Universal Profile

Feedback

My Direct Reports ▾ Options ▾

Use this page to provide informal, quick feedback to your peers across the organization.

e.g. I'd like to hear your thoughts on my latest project...

I would like feedback from...(e.g. John Smith)


☐ Ask for anonymous feedback responses

Managers and me ▾

Cancel Post

Add Goal

The option to add a goal to a feedback request is only available if the user has permission to view goals and request feedback. In addition, the option to add a goal is only available if enabled by the administrator in Feedback Preferences.

To add a goal to your feedback request, select the **GOAL** button . The Select a goal pop-up opens.

Select a goal ×


	Title	Due Date	Perspective	Weight	Status	Progress
<input type="radio"/>	Increase average sale value	12/31/2016	Sales	0%	Getting Started	10%
<input type="radio"/>	Ensure client success on all levels	12/31/2016	Customer Service	0%	Getting Started	15%
<input type="radio"/>	Improve sales efficiency	12/31/2016	Sales	0%	Behind Schedule	30%
<input checked="" type="radio"/>	Achieve \$1,000,000 in Sales	12/31/2016	Sales	35%	Behind Schedule	52%

Description:
Achieve \$1,200,000 in sales by the end of the year.

Start Date: 1/1/2016
Category: Efficiency, Quality
Status: Behind Schedule

Progress: 52%

Tasks & Targets

	Description:	Start Date:	Due Date:	Weight:	Progress:
					

Cancel Select

The Select a goal pop-up displays all of the user's approved goals that are within the current goal period. Team goals and shared goals are not displayed. When a goal is selected, the pop-up displays the details of the goal. Select the appropriate goal, and select the **SELECT** button. The goal appears within the feedback request.

Note: When a goal is added to a feedback request, the request displays the details and progress of the goal as it existed at the moment the feedback request is posted. If the details of the goal are modified or if progress is updated after the request is posted, then these updates will not be reflected in the feedback request. This behavior is intended to allow feedback providers to see the goal details and progress at the time the feedback was requested.

After a goal is added to a request, the user can add request text and one question. Then, the user must post the feedback request.

The Visibility for a request for goal feedback is set to Managers and Me by default. However, this visibility can be adjusted, if necessary. **Note:** When setting the visibility for the feedback request, be aware that anyone who can view the request can also view the details and progress of the associated goal. [See Feedback - Set Visibility.](#)

- When providing unsolicited feedback for another user on the Feedback page, the visibility is set to Everyone by default.

As someone who is seeking a promotion this year, I would appreciate it if you could take a few minutes to provide me feedback on my performance towards this goal.

Charles Cook

☐ Ask for anonymous feedback responses

Achieve \$1,000,000 in Sales

Achieve \$1,200,000 in sales by the end of the year.

Progress: 52%

Due Date: 12/31/2016

[See More](#)

How am I performing towards my sales goal?

Rating

Managers and me


Cancel Post

The following information is displayed for the selected goal:

- Title
- Description
- Progress
- Due Date

To view all of the goals details, select the [See More](#) link.

Remove Goal

To remove a goal from a feedback request, click the Remove icon  in the upper-right corner of the goal details. This returns the page to its original state.

Goal Feedback Request - Respond

With this enhancement, users can now map a feedback request to a specific goal. This enables users to solicit feedback that is directly related to a goal.

When a user is viewing a feedback request that is mapped to a goal, the basic details of the goal are displayed within the request. This enables the feedback provider to view the details and progress of the goal and use this information to help provide feedback. To view all of the goal's details, select the **See More** link.

Note: *When a goal is added to a feedback request, the request displays the details and progress of the goal as it existed at the moment the feedback request is posted. If the details of the goal are modified or if progress is updated after the request is posted, then these updates will not be reflected in the feedback request. This behavior is intended to allow feedback providers to see the goal details and progress at the time the feedback was requested.*

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.

Jon Lolley
Feedback Details

Feedback Details

Options ▾

Jon Lolley has requested feedback from 1 person - As someone who is seeking a promotion this year, I would appreciate it if you could take a few minutes to provide me feedback on my performance towards this goal.
1 minute ago - Everyone

Achieve \$1,000,000 in Sales

Achieve \$1,200,000 in sales by the end of the year.

Progress: 52%

Status: Behind Schedule
Start Date: 1/1/2016
Due Date: 12/31/2016

Tasks	Weight	Start Date	Due Date	Progress
Hold a seminar to attract new mid-market customers.	50	1/1/2016	12/31/2016	65

Targets	Weight	Start Date	Due Date	Target	Actual
Achieve \$500,000 in sales from new mid-market.	50	1/1/2016	12/31/2016	700,000.00	275,000.00

[See Less](#)

Hi Jon! I think you're doing a fantastic job and your help on that last project was invaluable!

How am I performing towards my sales goal?

4 - Exceeds Expectations ▾

Cancel
Share

Web Service Create Goal (New)

With this enhancement, a new Create Goal REST web service is now available. This web service can be used to create user goals.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
Title	String	This is required. This is the goal title.
Description	String	This is optional. This is the goal description.
StartDate	DateTime	This is required. This is the start date for the goal.
TargetDate	DateTime	This is required. This is the end date for the goal.
Weight	Number	This is optional. This is the goal weight. The default value is 0.
Perspective	String	This is required. This is the goal perspective.
AllowOtherUsersToSeeAndAlignWithThisGoal	Boolean	This is required. This is whether or not other users can see and align with the goal.
GoalCategories	List	This is optional. This is a list of all of the goal's categories.
GoalTasks	List	This is optional. This is a list of all of the goal's tasks.
GoalTargets	List	This is optional. This is a list of all of the goal's targets.
GoalAssignment	Object	This is required. This is the goal's assignment

DATA FIELD	TYPE	DESCRIPTION
		details.

Implementation

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

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

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Web Service EPM REST (Update)

With this enhancement, the following fields are now included in the EPM (REST) web service response:

- Competency Description - This displays the description of the competency.

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.

Web Service GetGoalDetails (New)

With this enhancement, a new GetGoalDetails REST web service is now available. This web service can be used to retrieve a user's goal details.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
Title	String	This is optional. This is the title of the goal that is being requested. Either the Title or UserId must be provided.
UserId	String	This is optional. This is the ID of the user whose goal details are being requested. Either the Title or UserId must be provided.
StartDate	DateTime	This is required. This is the start date for the goal. When requesting goal details, the service returns goals that are within the specified date range.
EndDate	DateTime	This is required. This is the end date for the goal. When requesting goal details, the service returns goals that are within the specified date range.
PageNumber	Number	This is optional. The default value is 1.
format	Enum	This is optional. This is the format in which the data should be returned. The options for this field are JSON and XML.

Response Parameters

This web service has the following response parameters:

DATA FIELD	TYPE	DESCRIPTION
GoalId	Number	This is the ID of the user's goal.
UserId	String	This is the ID of the user who has the goal.
ManagerId	String	This is the ID of the user's manager.
Title	String	This is the goal title.
Description	String	This is the goal description.

DATA FIELD	TYPE	DESCRIPTION
StartDate	DateTime	This is the start date for the goal.
TargetDate	DateTime	This is the end date for the goal.
Weight	Number	This is the goal weight.
Progress	Number	This is the goal progress.
Perspective	String	This is the goal perspective.
Status	String	This is the goal's current status.
GoalType	String	This is the goal type (My Goals, Manager's Goals, Division Goals, or Company Goals).
AllowOtherUsersToSeeAndAlignWithThisGoal	Boolean	This displays whether or not other users can see and align with the goal.
GoalCategories	List	This displays all of the goal's categories.
GoalTasks	List	This displays all of the goal's tasks.
GoalTargets	List	This displays all of the goal's targets.
GoalAssignment	List	This is always Null.
GoalComments	List	This displays all of the goal's first-level comments.

Implementation

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

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

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Reports: Performance Review Standard Report Consistency

Performance Review Standard Report Consistency

For consistency with other reports and areas of Performance, the Performance Review Section Score Comparison Standard Report and Performance Review Score Standard Report have been renamed to Performance Review Section Rating Comparison Standard Report and Performance Review Rating Standard Report. The word "score" has been replaced with "rating." The report name, description, field names, report output, and permissions have all been updated to reflect this change.

Implementation

This functionality is automatically enabled for all organizations using the Performance module.

Security

The following existing permissions are updated to reflect the new names of the reports:

The Performance Review Score Report permission is renamed to Performance Review Rating Report.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Rating Report	Grants access to Performance Review Rating Report, which displays performance review task overall and section ratings for multiple users. This permission can be constrained by OU, User's OU, User's Self and Subordinates, User, and User's Subordinates.	Reports - Performance

The Performance Review Section Score Comparison Report permission is renamed to Performance Review Section Rating Comparison Report.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Section Rating Comparison Report	Grants access to Performance Review Section Rating Comparison Report, which displays individual question ratings for a review section of a performance review task for a group of users. This permission can be constrained by OU, User's OU, and User's Subordinates.	Reports - Performance

Performance Review Rating Report

With this enhancement, the Performance Review Score Report is renamed to Performance Review Rating Report. In addition, the page description is updated to reflect this change.

In the report criteria, the following fields are renamed:

- Score Display - This field is now titled Rating Display.

In the report output, the following labels are renamed:

- Report title - The report is now titled Performance Review Rating.
- Overall Score - This column label is now titled Overall Rating.

To access the Performance Review Rating Report, go to **REPORTS > STANDARD REPORTS**. Select the Performance tab. Then, select the **Performance Review Rating** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Rating Report	Grants access to Performance Review Rating Report, which displays performance review task overall and section ratings for multiple users. This permission can be constrained by OU, User's OU, User's Self and Subordinates, User, and User's Subordinates.	Reports - Performance

Performance Review Rating

Report Criteria

Displays Performance Review Ratings for a specific review.

USER CRITERIA

User Criteria: ▼

ADVANCED FILTERS

Performance Review Task: 

Review Section: Review sections will appear when task is selected

Rating Display: ☒ Numeric ☐ Text

User Status: ☐ Include inactive users

In-Progress Task: ☐ Include reviews that are in progress

Display OU: ▼

OUTPUT

 [Printable Version](#)  [Export to Excel](#)  [Export to Text](#)

Performance Review Section Rating Comparison Report

With this enhancement, the Performance Review Section Score Comparison Report is renamed to Performance Review Section Rating Comparison Report. In addition, the page description is updated to reflect this change.

In the report criteria, the following fields and options are renamed:

- Score Display - This field is now titled Rating Display.
- Response Display - The options in this drop-down now use the term "Rating."

In the report output, the following labels are renamed:

- Report title - The report is now titled Performance Review Section Rating Comparison.

To access the Performance Review Section Rating Comparison Report, go to **REPORTS > STANDARD REPORTS**. Select the Performance tab. Then, select the **Performance Review Section Rating Comparison** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Section Rating Comparison Report	Grants access to Performance Review Section Rating Comparison Report, which displays individual question ratings for a review section of a performance review task for a group of users. This permission can be constrained by OU, User's OU, and User's Subordinates.	Reports - Performance

Performance Review Section Rating Comparison

Report Criteria

Compare individual reviewee ratings within a task review section for Question sections and Competency sections. Note, this report does not return results for Goal sections as goals are generally unique to each individual, making rating comparison ineffective.

USER FILTERS

User Criteria: ▼

ADVANCED FILTERS

Performance Review Task:

Review Section: Review sections will appear when a task is selected

Group By: ☒ Question ☐ User

Rating Display: ☒ Numeric ☐ Text

Response Display: ▼


Question Display: ☒ Full Question ☐ Abbreviated (25 chars)

Sort By: ☒ User Name ☐ Question Rating ☐ Section Rating

PROCESS REPORT

Report Title:

(If no report title is entered, the title of the report will default to Performance Review Section Rating Comparison)

 [Process Report](#)

Processed Reports

Report Name	Create Date	Last Run	Output	Options

Recruiting

Add to/Move to Requisition Enhancements

Add to/Move to Requisition Enhancements Overview

With this enhancement, the Add to Requisition and Move to Requisition actions allow compatible application components to be moved with the applicant (if the applicant has selected to be considered for other positions). When an applicant is added or moved, they will not need to complete application steps in the new requisition that are identical to application steps in the requisition from which they were added or moved. Also, the recruiter can choose to persist the original status or select a new status when moving an applicant.

Prior to this enhancement, only the applicant was added or moved to a requisition. Their application and other documents were not moved, and the applicant needed to be invited to apply to the new requisition in order to complete the application.

Use Case

A recruiter frequently moves applicants from one requisition to another. This may occur if applicants are a better fit for other requisitions. While sourcing, the recruiter may also add applicants to requisitions from Talent Pools or Candidate Search. The recruiter wants the application data to be moved or copied to the target requisition so that the applicant is not asked to re-apply.

FAQs

[What application data is carried over?](#)

Any application data that matches from the current requisition to the new requisition, excluding Training, Assessments or Selection components. The new requisition must have compatible application sections in order for data from the current requisition to be put into the applicable sections of the new requisition. For example, if an applicant completed a Compliance Questions section on the application for the current requisition, but the application for the new requisition does not include a Compliance Questions section, then the applicant's responses to the compliance questions are not carried over.

Note: *The applicant must have opted in or agreed to be considered for other positions in order for any application data to be carried over to a different requisition. If the applicant has not agreed to be considered for other positions, then the application data will not be copied over and the applicant must be invited to apply.*

[Where can I view the applicant's carried over resume?](#)

You can view the resume data on the Applicant Profile > Application tab.

You can view the resume document attachment on the Applicant Profile > Documents tab.

[Where can I view any documents the applicant uploaded?](#)

You can view their uploaded documents on the Applicant Profile > Documents tab.

[Does referral or agency credit carry over?](#)

The referral will carry over if the referral for future preference is set and the time has not expired. The referral will not carry over (source will display as Manually Added or Manually Moved) if the preference is not set and if the time has expired.

The agency source will carry over to the new requisition if the agency time has not expired. If the agency time has expired, the source will display as 'Manually Added' or 'Manually Moved'.

[Does this enhancement apply to Candidate Search Query, Search Candidates \(Old\), or Talent Pools \(New\)?](#)

No, this enhancement will only apply when the applicant being moved has an application.

[How are pre-screening questions handled?](#)

Question/response options are compared between the current and new requisition to determine if an applicant will be screened out based on their response to a question. If the applicant will be screened out by having their responses carried over, then a message displays in the Internal/External Applicants section of the Add/Move to Requisition pop-up identifying that the applicant will be added or moved but the applicant has been screened out.

[How are pre-screening surveys handled?](#)

Pre-screening surveys are a collection of prescreening questions. Prescreening responses and scores will be carried over to the new requisition if all pre-screening questions in the new requisition's prescreening survey match those in the current requisition (meaning that the applicant has answered all questions in that section). If any of the questions differ or are missing, then the applicant will need to answer the missing questions in order to complete the application. Responses to questions that do match will be saved so the applicant only needs to answer new questions. Each survey is listed separately in the Internal/External Applicants section of the Add/Move to Requisition pop-up.

[How are compliance questions handled?](#)

Applicant responses to compliance questions are carried over if an identical Compliance Questions section is included in the current and new requisition. Keep in mind that the applicant must have opted in or agreed to be considered for other positions in order for any application data to be carried over to a different requisition. This is for compliance reasons.

[How are completed training, Selection components, and SHL assessments handled?](#)

Training, Assessment and Selection components will not be carried over from requisition to requisition. This data cannot be carried over since an external vendor may own the assessment and the system will not be able to confirm if the assessment questions are identical. An applicant will need to complete the assessment on the new requisition.

[How are forms handled?](#)

Completed forms will be carried over, provided that the form is identical in the new requisition. The applicant's responses to the questions are carried over.

Each form is listed separately by form title. Forms that are not carried over are also listed separately by form title.

The form can be viewed in the applicable forms section of the Applicant Profile > Application tab.

[How are multiple languages handled?](#)

For portals with multiple languages enabled and for which the requisition has translations for the action item, the action item will be copied if the default text from the current requisition matches the new requisition. For example, a requisition has English as the default language for a disclaimer, and the new requisition has German as the default language for the disclaimer but also includes an English translation. The disclaimer will be copied.

[What if my application workflow includes a disclaimer that the applicant must agree to before they can submit the application?](#)

The applicant's response to the disclaimer will be copied, provided that the disclaimer text in the current requisition is identical to the text in the new requisition. Each disclaimer will be listed separately in the Internal/External Applicants section of the Add/Move to Requisition pop-up based on the Disclaimer action item title.

[Can I view a .pdf of the application for added/moved applicants?](#)

Yes. A .pdf of the new application will be available for the applicant if all application components could be copied.

The application from the previous requisition will be available in the Documents tab of the Applicant Profile if that previous requisition contained a completed application.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
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	Recruiting

	<p><i>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.</i></p>	
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>Note: <i>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.</i></p> <p>Note: <i>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.</i></p>	Recruiting

Add/Move to Requisition

With this enhancement, the Add to Requisition and Move to Requisition actions allow compatible application components to be carried with the applicant (if the applicant has selected to be considered for other positions). When an applicant is added or moved, they will not need to complete application steps in the new requisition that are identical to application steps in the requisition from which they were added or moved. Also, the recruiter can choose to persist the original status or select a new status when moving an applicant.

To access the Manage Applicants page, go to **Recruit > Manage Requisition**. On the Manage Requisition page, locate the requisition for which you would like to manage candidates. From there, click the linked number of candidates in the Applicants column.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: 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
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	<p>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.</p> <p>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.</p>	Recruiting

Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>Note: <i>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.</i></p> <p>Note: <i>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.</i></p>	Recruiting
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Add/Move to Requisition Pop-Up

With this enhancement, the Add/Move to Requisition Pop-Up is updated to explain which applicant data will be carried over with the applicant when they are added or moved to a different requisition.

In addition, you can now select the status in which the applicant will appear when added or moved. Prior to this enhancement, applicants could only be placed in a New Submission or Applicant status.

Add to Requisition

Selected Requisitions				
	Title	ID	New Status	Send Email To
<input checked="" type="checkbox"/>	CSR - West	req20	New Submission ▼	<input type="checkbox"/> Potential Applicant(s) <input type="checkbox"/> Requisition Owner(s)

Internal Applicants

Application data that will be moved with this applicant: **Upload Attachments**

Application data that does not match this requisition and cannot be moved: **Compliance Questions, Travel Request**

The application document, as well as other documents from the source requisition, will be copied to the Applicant Profile - Documents tab if the source requisition contains a completed application or at least one document.

Open Requisitions					
	Title	ID	Division	Location	Owner
<input checked="" type="checkbox"/>	Business Development Ma...	req29	Central	New York	Susan Baum
<input checked="" type="checkbox"/>	Call Center Representative	req16	Central	California	Cornerstone Admin
<input checked="" type="checkbox"/>	Call Center Representative...	req17	Central	California	Cornerstone Admin

New Status Column

The New Status column in the Selected Requisitions table replaces the Add As column. The New Status column allows you to select the status in which the applicant will be placed when they are added/moved to a different requisition.

To configure the applicant's status:

1. Click the drop-down in the New Status column. All applicant statuses for the requisition display in the drop-down.
2. Select the status from the drop-down. Required statuses are marked with an asterisk and cannot be skipped. The New Submission status is selected by default. The Closed status is not available to select, as applicants cannot be added or moved to a requisition in a Closed status. **Note:** *Statuses can be defined as required by the administrator when **configuring the job requisition template** and by the recruiter when **configuring the job requisition**.*

Internal/External Applicants Section

This section is new with the July '16 release. This section explains which applicant data will be carried over for the internal or external applicant when they are added or moved to a different requisition. Since the internal and external application workflow may differ, the

Internal Applicant and External Applicant labels identify the appropriate internal or external application workflow item that can be carried over. Each applicant workflow item will be listed separately by the name of the action item.

If there is at least one document included in the application, such as a cover letter or resume, then this section also indicates that the document will be carried over.

The only application data that can be carried over is data that matches the requisition to which the applicant is being added or moved. (Note: the applicant must have selected to be considered for other positions in order for application data to be moved). For example, if an applicant completed a Compliance Questions section on the application for the current requisition, but the application for the new requisition does not include a Compliance Questions section, then the applicant's responses to the compliance questions are not carried over.

Opted Out Applicants

For applicants who have opted out of being considered for other jobs, a message displays in the Application Action Results pop-up indicating that one or more applicants does not want to be considered for other positions and that the applicant must be invited to apply to complete the application for the new requisition. **Note:** *If a client has disabled the opt out text from displaying on the application workflow or candidate my profile, then the applicant will not be considered for other jobs and the application data will not be carried over with the Add to or Move to Requisition actions.*

In order to fully utilize this new feature, it is recommended that you do not disable the **Applicant Opt Out** setting in the Compliance Preferences section of the **Requisition and Applicant Preferences** page.

Applicant Action Results Pop-Up

The Applicant Action Results pop-up will indicate if the applicant has opted out.

Name	Details
Raj Sharma	Successful: Added to Accountant (req143) This applicant does not want to be considered for other positions and must be invited to apply.

☒ Include successful actions OK




Pre-Screening Questions - Screen Out Applicants

If an applicant will be removed from the applicant pool in the new requisition based on their response to a pre-screening question that has carried over to the new requisition, the

Application Action Results pop-up will indicate that the application status is Closed as a result of failing the pre-screening questions section.


Applicant Profile - Application Tab

For applicants who are added or moved to a requisition via the Add to Requisition or Move to Requisition actions, the applicant's resume data displays in the Applicant Profile > Application > Upload Attachments section.

 Sam Martin Snapshot	 837 South River Street Jacksonville, VA 29736 United States	Division: US Type: Internal Language Preference: English (US)															
	<div> Summary Statuses Application Comments Documents History Email </div>																
<div> <div>✓ Compliance Questions ▾</div> <div>✓ Upload Attachments ▲</div> </div>																	
Sales Manager, Munich (req75) Status: New Submission Applied: 3/31/2016	Current Resume/CV: 																
Accountant (req143) Status: In Review Applied: 3/23/2016	<div>Previous Positions</div> <table border="1"> <thead> <tr> <th>Position</th> <th>Company</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>Cashier</td> <td>XY Kids Store</td> <td>Responsibilities: * Managed all cash input and data entry to computers ; * Wrapped goods that bought by customers ; * Helped customer's problems with a product</td> </tr> <tr> <td>Cashier</td> <td>Nordstrom</td> <td>Responsibilities: * Calculate money in cash drawers * Make a cash register process * Give a good service for the customers * Serve cash and credit card payment * Wrap a goods which bought by customers ; * Greeting with customers entering the store * Answer the customer's question ; * Provide all information about products ; * Responsible for customer's complaint about calculation error</td> </tr> </tbody> </table>		Position	Company	Details	Cashier	XY Kids Store	Responsibilities: * Managed all cash input and data entry to computers ; * Wrapped goods that bought by customers ; * Helped customer's problems with a product	Cashier	Nordstrom	Responsibilities: * Calculate money in cash drawers * Make a cash register process * Give a good service for the customers * Serve cash and credit card payment * Wrap a goods which bought by customers ; * Greeting with customers entering the store * Answer the customer's question ; * Provide all information about products ; * Responsible for customer's complaint about calculation error						
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Accountant (req121) Status: In Review Applied: 12/2/2015	<div>Education</div> <table border="1"> <thead> <tr> <th>Degree</th> <th>Graduation Date</th> <th>Major</th> <th>Minor</th> <th>Degree in Progress</th> </tr> </thead> <tbody> <tr> <td>Bachelor of Arts (BA)</td> <td>6/10/2011</td> <td>Sales</td> <td>Business</td> <td>False</td> </tr> <tr> <td>Diploma</td> <td>1/1/2002</td> <td>Administration</td> <td></td> <td>N/A</td> </tr> </tbody> </table>		Degree	Graduation Date	Major	Minor	Degree in Progress	Bachelor of Arts (BA)	6/10/2011	Sales	Business	False	Diploma	1/1/2002	Administration		N/A
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Customer Care Representativ... Status: In Review Applied: 2/2/2015	<div>Certifications</div>																
Retail Cashier (req90) Status: In Review Applied: 8/28/2014																	

Applicant Profile - Documents

For applicants who are added or moved to a requisition via the Add to Requisition or Move to Requisition actions, any attached documents display on the Applicant Profile > Documents tab. Attached documents include cover letter, resume, .pdf version of the application from the source requisition, and other user and recruiter uploaded documents.



Sam Martin
[Snapshot](#)

262 872-8763
837 South River Street
Jacksonville, VA 29736
United States

Position: Sales Representative
Division: US
Type: Internal
Language Preference: English (US)

Sales Manager, Munich (req75)
Status: New Submission
Applied: 3/31/2016

Accountant (req143)
Status: In Review
Applied: 3/23/2016

Accountant (req121)
Status: In Review
Applied: 12/2/2015

Customer Care Representativ...
Status: In Review
Applied: 2/2/2015

Retail Cashier (req90)
Status: In Review
Applied: 8/28/2014

Summary | **Statuses** | Application | Comments | Documents | History | Email

Applicant Documents

Review or upload a Resume/CV, a Cover Letter and up to ten (10) Other Documents for this applicant. It may take several minutes for new attachments to be included in the Application PDF.

Document	Title	Upload User	Upload Date	Options
Resume/CV	Sam Resume	Sam Martin [jenniferpendleton@yahoo.com]	8/29/2014	
Cover Letter	Upload Cover Letter			
Other Document	Upload Other Document			

Attachments

[Add Attachment](#)

Applicant Status	Title	Upload User	Upload Date	Options
New Submission	Flattened Application - 90	Sam Martin [jenniferpendleton@yahoo.com]	8/28/2014	

[« Back](#)

Career Site - My Profile Page

With this enhancement, the Application Status section of the My Profile page on the career site now indicates when an applicant has been manually added/moved to a requisition. New text displays below the job title to indicate that the applicant has been manually added. The text also applies to applicants who are moved to a requisition.

As with existing functionality, if the application is incomplete when the applicant is added/moved, the applicant will have the option to complete the application. If the application is already complete when the applicant is added/moved, then the Application Status section indicates that the application is complete. Applicants can view completed and incomplete applications.

Standard and Custom Reporting

With this enhancement, Recruiting Custom Reports and standard Recruiting reports are unchanged. Any applicant that is moved or added to a new requisition will continue to show in the Recruiting reports. If the status of an applicant was changed, the new status will be represented in reporting.

Apply With Seek

Apply with Seek Overview

With this enhancement, the Apply with Seek integration is now available from the Edge Integration Center. This integration allows applicants to apply to jobs using their Seek profile. Prior to this enhancement, job applicants only had the ability to apply to jobs by either uploading their resumes or using their LinkedIn profile. The Apply with Seek integration provides an additional option for global applicants.

In addition, Apply with LinkedIn will also be available as an integration from the Edge Integration Center.

Implementation

To enable this functionality, contact Global Product Support. Then, you can purchase Seek from the Edge Marketplace for \$0.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
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
Recruiting General Preferences - Manage	Grants ability to access and manage Recruitment General Preferences.	Recruiting Administration

General Preferences - Allow Internal Applicants to Apply with Seek

For portals with the Apply with Seek integration enabled, an **Allow Internal to apply with Seek (from Career Center)** option is added to the Candidate Application section of General Preferences. This option is checked by default. When checked, internal applicants can use their Seek profile to apply to jobs.

The screenshot displays the 'General Preferences' configuration page. It is organized into several sections, each with a header bar: 'CANDIDATE PHOTOS', 'CANDIDATE REVIEW', 'APPLICANT PROFILE', and 'CANDIDATE APPLICATION'. Under 'CANDIDATE PHOTOS', the 'Allow candidate photos' checkbox is checked. Under 'CANDIDATE REVIEW', both 'Allow reviewer comments' and 'Allow reviewer ratings' are checked. Under 'APPLICANT PROFILE', the 'Display all application tabs on Applicant Profile' checkbox is checked, with a descriptive note below it. The 'CANDIDATE APPLICATION' section contains four checkboxes, all of which are checked: 'External applicants may re-apply to a requisition after they receive a disposition.', 'Internal applicants may re-apply to a requisition after they receive a disposition.', 'Allow Internal to apply with Seek (from Career Center)' (this option is highlighted with a red rectangular box), and 'Allow Internal to apply with LinkedIn (from Career Center)'. Below these sections is a checkbox for 'Overwrite custom settings for all child Divisions' which is currently unchecked, accompanied by explanatory text. At the bottom of the form are 'Submit' and 'Cancel' buttons.

General Preferences

CANDIDATE PHOTOS

- ☒ Allow candidate photos

CANDIDATE REVIEW

- ☒ Allow reviewer comments
- ☒ Allow reviewer ratings

APPLICANT PROFILE

- ☒ Display all application tabs on Applicant Profile. When unselected, other applications submitted are hidden on Applicant Profile for the user in this OU. This setting is selected by default.

CANDIDATE APPLICATION

- ☒ External applicants may re-apply to a requisition after they receive a disposition.
- ☒ Internal applicants may re-apply to a requisition after they receive a disposition.
- ☒ Allow Internal to apply with Seek (from Career Center)
- ☒ Allow Internal to apply with LinkedIn (from Career Center)
- ☒ Include manually updated resume data on the application document.

☐ 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.

Create Career Site - General Settings

For portals with Apply with Seek enabled, an **Allow Apply with Seek** option is available in the Career Site General Settings section when configuring career sites. When this option is checked, an **APPLY WITH SEEK** button displays on the career site for applicants and allows them to apply to the job using their Seek profile. This option is unchecked by default.

Allow Apply with LinkedIn: ☒

Allow Apply with Seek: ☒

Allow Connect with Facebook: ☒

Referrals: ☒ Allow Refer by Email ☒ Allow Share this on Facebook ☒ Allow Share this on LinkedIn

Active: ☒

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

Career Site - Job Details Page

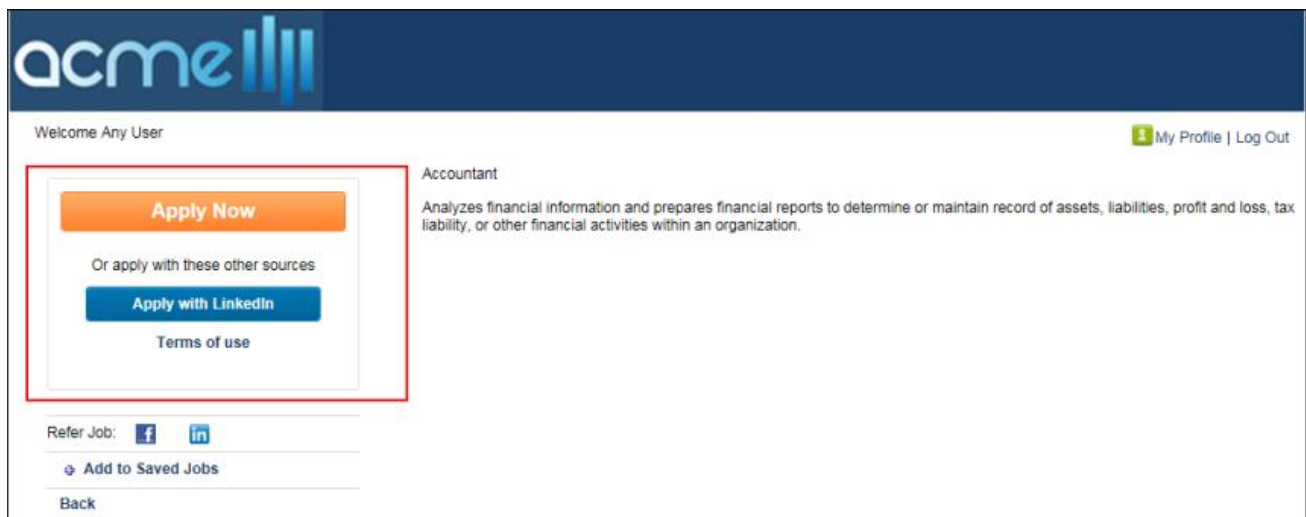
Apply With Seek

For portals with Apply with Seek enabled, an **APPLY WITH SEEK** button displays on the job details page of the career site. Applicants can click the button to apply to the job using their Seek profile. This opens a Seek pop-up that allows the applicant to sign in to Seek and apply. Once signed in to Seek, the applicant is taken to the first step in the application workflow for the job.

As soon as an applicant signs in to Seek from the career site, a candidate profile is created for the user in the organization's portal.

User Interface Enhancement

Also with this enhancement, the user interface (UI) for the apply section of the job details page is updated. The **APPLY NOW** button now displays at the top of the apply options. The additional apply options, such as **APPLY WITH LINKEDIN** and **APPLY WITH SEEK**, display below the **APPLY NOW** button.



Career Site - Applicant Sign-In

For applicants who already have a profile on the career site but are logged out, the Applicant Profile > Sign In page allows applicants to sign in with Seek if the Apply with Seek integration has been enabled for the portal.

Clicking the **SIGN IN WITH SEEK** button opens the login screen for Seek. Applicants can log in to their Seek profile, and then they are returned to the career site.

If you are already signed in with Seek but are not logged in to the career site, clicking the **SIGN IN WITH SEEK** button will sign you in to the career site without opening the Seek login screen.

The screenshot shows the 'Applicant Profile' page for 'ACME INC TALENT MANAGEMENT'. The page features a dark header with the company logo and navigation links: CAREERS, PROJECTS, ABOUT, and CONTACT. Social media icons for Facebook, Twitter, and Google+ are also present. The main content area is titled 'Applicant Profile' and contains a 'Sign In' modal. The modal has a 'Sign in with:' section with two buttons: 'Sign in with LinkedIn' and 'Sign in with Seek'. The 'Sign in with Seek' button is highlighted with a red border. Below this, there is an 'OR' separator, followed by 'Email' and 'Password' input fields, a 'Sign in' button, a 'Forgot password?' link, and a 'Don't have a profile? Create a new Profile' link. At the bottom of the modal is a '<< Back to Search' link. Below the modal, a footer note states: 'By signing in or creating a profile you agree to our Terms of Service'.


Application - Upload Attachments

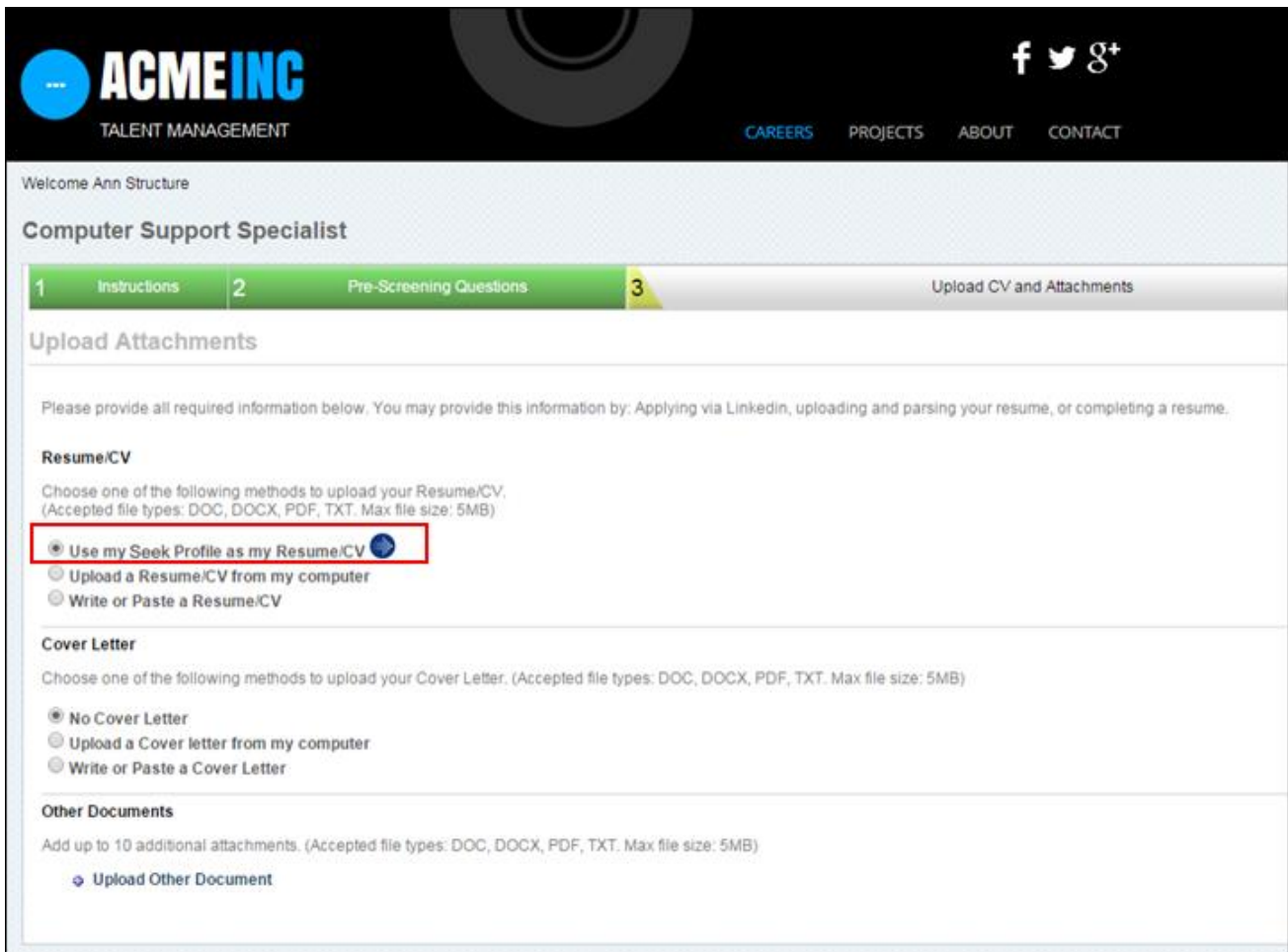
For portals with Apply with Seek enabled, applicants can use their Seek profile as their Resume/CV. The following options are available for applying with Seek:

Use my Seek Profile as my Resume/CV

With this enhancement, the **Use my Seek Profile as my Resume/CV** option is added to the Upload Attachments page of the application. This option allows applicants to use their Seek profile as their resume/CV.

To use a Seek resume/CV:

1. Click the Seek icon  to the right of the **Use my Seek Profile as my Resume/CV** option. This opens a Seek authorization page.
2. Enter your Seek login credentials to verify that you would like to use your profile as your resume/CV.
3. Once verified, click **NEXT** from the application. This populates the resume fields of the application with your Seek profile data.



Welcome Ann Structure

Computer Support Specialist


1 Instructions 2 Pre-Screening Questions 3 Upload CV and Attachments

Upload Attachments

Please provide all required information below. You may provide this information by: Applying via LinkedIn, uploading and parsing your resume, or completing a resume.

Resume/CV

Choose one of the following methods to upload your Resume/CV. (Accepted file types: DOC, DOCX, PDF, TXT. Max file size: 5MB)

- ☒ Use my Seek Profile as my Resume/CV 
- ☐ Upload a Resume/CV from my computer
- ☐ Write or Paste a Resume/CV


Cover Letter

Choose one of the following methods to upload your Cover Letter. (Accepted file types: DOC, DOCX, PDF, TXT. Max file size: 5MB)

- ☒ No Cover Letter
- ☐ Upload a Cover letter from my computer
- ☐ Write or Paste a Cover Letter

Other Documents

Add up to 10 additional attachments. (Accepted file types: DOC, DOCX, PDF, TXT. Max file size: 5MB)

 Upload Other Document

Use My Existing Resume/CV

Once an applicant has applied to a job using their Seek profile, the **Use my existing Resume/CV** option displays on the Upload Attachments page of the application. This option allows applicants to quickly use their Seek profile to apply to a different job.

When the **Use my existing Resume/CV** option is selected, the applicant's existing Seek resume is automatically used for the application.



Upload Attachments

We are excited you are applying for this job!

Please provide all required information below. You may provide this information by: Applying via LinkedIn, uploading and parsing your resume

Resume/CV

Choose one of the following methods to upload your Resume/CV. (Accepted file types: DOC, DOCX, PDF, TXT. Max file size: 5MB)

- ☒ Use my existing Resume/CV (View - )
- ☐ Use my Seek Profile as my Resume/CV 
- ☐ Upload a Resume/CV from my computer
- ☐ Write or Paste a Resume/CV


Cover Letter

Choose one of the following methods to upload your Cover Letter. (Accepted file types: DOC, DOCX, PDF, TXT. Max file size: 5MB)

- ☒ No Cover Letter
- ☐ Upload a Cover letter from my computer
- ☐ Write or Paste a Cover Letter


Other Documents

Add up to 10 additional attachments. (Accepted file types: DOC, DOCX, PDF, TXT. Max file size: 5MB)

 Upload Other Document

View Applicant Seek Resume/CV

When applicants apply to a job using their Seek profile, recruiters can view the Seek resume/CV from multiple areas of the Applicant Tracking System (ATS).

The following areas of the ATS display a Seek icon , which recruiters can click to open the applicant's Seek resume/CV:

- Applicant's completed application on the Applicant Profile page
- Manage Applicants - The Seek icon displays to the right of the applicant's name in the Applicants column.
- Applicant Profile - The Seek icon displays in the **Resume/CV** field on the Summary tab.
- New Submissions - The Seek icon displays in the Resume/CV column of the New Submissions table.
- Candidate Search Query - The Seek icon displays to the right of the applicant's email address on the search results page.
- Search Candidates (Old) - The Seek icon displays in the Options column on the search results page.

Resume/CV Page

The Resume/CV page also displays an applicant's Seek resume data. This allows recruiters to view the resume when accessing the Resume/CV page.

Approvals in Universal Profile

Approvals in Universal Profile Overview

With this enhancement, users can now approve job requisitions and requisition requests from the Actions > Requests tab in the Universal Profile.

Prior to this enhancement, users had to go to multiple places in the Applicant Tracking System (ATS) to approve these items. This enhancement provides one place from which approval decisions can be submitted.

Note: Users must have permission to approve requisitions in order for job requisitions to appear in their Universal Profile. Users must have permission to manage requisitions in order for requisition requests to appear in their Universal Profile. Users must have permission to view request items in order to access the Requests tab for requisition request approvals.

Use Case

Veronica is a recruiter who has multiple requisition requests to review. While she is in the Universal Profile performing actions under the Requests tab, she sees that she needs to approve requisition requests that Summer, a Hiring Manager, has initiated.

Summer is a Hiring Manager who has multiple positions to fill on her team. After Veronica has created the requisitions that Summer requested, Summer goes to the Universal Profile to approve those requisitions before Veronica posts them.

Security

The following existing permissions apply to this functionality:

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
Requisition: Approver	Enables approver to access and approve/deny requisitions for which they are an approver. This permission cannot be constrained. Note: This is a dynamically assigned permission. If the user is removed as an approver for an offer that is in a Pending Offer status, the user can no longer access that version of the offer. This permission cannot be manually assigned.	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

Universal Profile - Actions Tab - Requests

With this enhancement, users can now approve and deny job requisitions and requisition requests from the Actions > Requests tab in the Universal Profile. Users with permission to approve requisitions (listed as a Requisition Approver on a requisition's hiring team) can approve/deny job requisitions. Users identified in Admin > Recruit > Requisition Requests as requisition request approvers can approve/deny requisition requests.

Note: Upon implementation of this enhancement, previously approved or denied requisitions and requisition requests are available from the Requests tab. These requests can be viewed by filtering by Approved or Denied status.

To access the Requests tab, go to **Home > Universal Profile > Actions > Requests**.

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
Requisition: Approver	Enables approver to access and approve/deny requisitions for which they are an approver. This permission cannot be constrained. Note: This is a dynamically assigned permission. If the user is removed as an approver for an offer that is in a Pending Offer status, the user can no longer access that version of the offer. This permission cannot be manually assigned.	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

Filter by Requisitions/Requisition Requests

New filters are added to the filter drop-down to allow filtering by requisitions and requisition requests. Select **Requisition Approval** in the drop-down to filter by job requisition approvals. Select **Requisition Request** in the drop-down to filter by requisition request approvals.

Filter by Approved/Denied Requisitions/Requisition Requests

As with existing functionality, you can filter requests in the status filter by Approved and Denied. With this enhancement, this filter allows you to view requisitions and requisition requests that you have approved or denied.

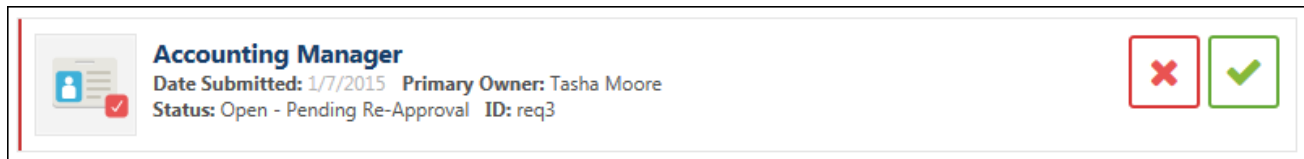
The screenshot shows a web interface for managing requisitions. At the top, there are two tabs: 'Actions' and 'Requests'. Below the tabs is a filter section with three dropdown menus: 'Requisition Approval', 'By Date Submitted', and 'Approved'. To the right of these is a search bar with a magnifying glass icon. Below the filter section, there are two date pickers labeled 'Start Date' and 'End Date', each with a calendar icon, and a 'Search' button. A dark banner below the filters indicates 'Submitted More Than A Month Ago'. The main content area displays a list item for 'Accounting Manager'. The item includes a red checkmark icon, the title 'Accounting Manager', the date 'Date Submitted: 1/7/2015', the primary owner 'Primary Owner: Tasha Moore', the status 'Status: Approved', and the ID 'ID: req3'. A 'Review' button is located to the right of the item details.

When viewing approved/denied requisitions and requisition requests, a **REVIEW** button displays for the item. Click **REVIEW** to view the details of the approval decision and any comments that were submitted.

Requisitions


The following information displays for pending requisition approval items:

- **Icon** - An icon displays for each pending approval item. The icon displays a red checkmark for Requisition Approvals.
 - **Color Strip** - A color strip displays on the left side of the item. The following colors display:
 - Red - This indicates that the action is more than six days old.
 - Yellow - This indicates the action is 3-6 days old.
 - Green - This indicates that the action is less than three days old.
 - **Title** - This displays the title of the requisition. Hover over the title to view the Position organizational unit (OU). The title of the requisition is clickable. Click the title to open the Edit Requisition page, which allows you to review the details of the requisition prior to making a decision. You can also modify the requisition and submit the changes if the requisition is in an editable status. ***For more information about editable fields based on requisition status, see the Edit Job Requisition topic in Online Help.***
- Note:** *As with existing functionality, the visibility of custom fields on a requisition is based on the availability settings for the field in Custom Field Administration.*
- **Date Submitted** - This displays the date on which the item was submitted.
 - **Primary Owner** - This displays the primary owner of the item.
 - **Status** - This displays the approval status of the item. The statuses that display are dependent upon the approval status options for **requisitions**.
 - **ID** - This displays the requisition ID.



Deny Requisition


To deny the requisition:

1. Click the deny button . This opens the deny pop-up.
2. Enter comments about your approval decision in the Comment box, up to 2000 characters.
3. Click **DENY** to process the denial.

Once you have submitted your decision, the pending action item is removed from the Requests tab. The status is updated to Denied, and the approval process is considered completed. No subsequent approvers in the workflow can make an approval decision. Any approval decisions and comments made prior to the denial are saved.

Approve Requisition

To approve the requisition:

- Click the approve button . This opens the approve pop-up.
- Enter comments about your approval decision in the Comment box, up to 2000 characters.
- Click **APPROVE** to process the approval.

Once you have submitted your decision, the pending action item is removed from the Requests tab. This commits your approval decision for that step in the approval workflow and any other steps for which you are an approver.

If this is the last step in the workflow and you are the only approver in the step, then the request is considered completed, and the form's status is updated to Approved.

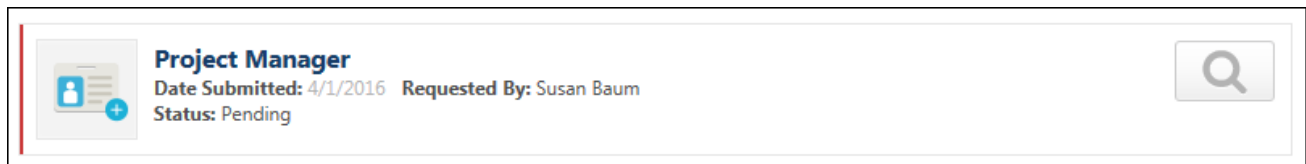
If there are other approval steps in the workflow or if other approvers are in your step of the workflow, then the request is not considered completed until all steps in the workflow are finished.

Requisition Requests

The following information displays for pending requisition request approval items:

- **Icon** - An icon displays for each pending approval item. The icon displays a blue plus sign for Requisition Request Approvals.
- **Color Strip** - A color strip displays on the left side of the item. The following colors display:
 - Red - This indicates that the action is more than six days old.
 - Yellow - This indicates the action is 3-6 days old.
 - Green - This indicates that the action is less than three days old.

- **Title** - The title of the item is clickable. Click the title to open the Requisition Request page, which allows you to review the details of the request prior to making a decision. In addition, visibility of custom fields on the requisition are dependent upon how the availability for the custom field is configured by the administrator in Custom Field Administration.
- **Date Submitted** - This displays the date on which the item was submitted.
- **Primary Owner** - This displays the primary owner of the item.
- **Requested By** - This displays the name of the person who submitted the requisition request.
- **Status** - This displays the approval status of the item. The statuses that display are dependent upon the approval status options for **requisition requests**.



View/Deny/Approve Requisition Request

Click the Review Requisition Request button  to open the View Requisition Request page. This allows you to view a read-only version of the requisition request.

As with existing functionality, you can decline or approve the request from the View Requisition Request page. Approval of a request involves creating the requisition by clicking the **CREATE REQUISITION** button. Once you have submitted your approval decision, the pending action item is removed from the list.

*For more information about declining/creating requisition requests, see the **Review/Decline/Accept Requisition Request** topic in Online Help.*

View Direct Reports' Universal Profile

When viewing the Actions > Requests page for another user's Universal Profile via the **MY DIRECT REPORTS** option, there are no clickable options for the requisition request. You can view the general details of the request, such as the date submitted and requester, but you cannot take action on the request.

Connect With Us

Connect With Us Overview

A Connect With Us page is added to Career Site Management. Connect With Us enables applicants to apply directly to a company instead of requiring applying to a specific requisition. Often, qualified candidates cannot find the ideal position on a career site. Connect With Us enables organizations to still capture the information from these applicants and find those applicants via a candidate search query.

Prior to this enhancement, applicants could only apply to a specific job, rather than apply to a company.

Use Cases

- Mike is an applicant who is navigating through ACME's career site and does not see any open positions that would be a good fit for him, even though he is a highly qualified applicant. He needs a way to submit his basic information, including resume and area of interest, so that he can be notified by ACME when a position opens that matches his interest.
- Lauren is a recruiter who needs to find applicants like Mike to fill her recently open positions and to build her talent pools. Lauren needs a way to search for applicants like Mike and segregate those applicants based on different criteria, such as area of interest and location.

Considerations

For portals that assign external applicants a specific organizational unit (OU) when they apply to a job, it is important to note that the Connect With Us functionality does not assign an OU when applicants apply via Connect With Us.

Duplicate Applicant Prevention

To reduce the possibility of duplicate applicants, the Connect With Us form does not allow applicants to apply using an email address that is already in use in the career site. The **Email** field on the Connect With Us form is a standard field that applicants must complete before applying via Connect With Us.

In addition, for existing applicants who already have a profile in the career site but who attempt to apply using their LinkedIn or Seek profile via Connect With Us, a message will display to indicate that they are already connected with the organization. This prevents applicants from creating duplicate profiles in the career site using a social network profile.

Security


The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

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

	<p>constrained.</p> <p>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.</p>	
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>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.</p> <p>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.</p>	Recruiting

Career Site Management


With this enhancement, an Edit Connect With Us option  is added to the Options column of the Career Site Management page. Clicking this option opens the **Connect With Us** page.

















































To manage career site pages, go to **Admin > Tools > Recruit > Career Site**.


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

Career Site Management

 Add Career Site

Career Site Title	URL	Allow Apply with LinkedIn	Active	Options
Current Job Board	https://qa05.csod.com/ats/careersite/search.aspx?site=7&c=qa05-techwriter	Yes	Yes	     
Edge Talent	https://qa05.csod.com/ats/careersite/search.aspx?site=6&c=qa05-techwriter	Yes	Yes	     
Job Board	https://qa05.csod.com/ats/careersite/search.aspx?site=1&c=qa05-techwriter	Yes	Yes	     
NCS	https://qa05.csod.com/ats/careersite/search.aspx?site=4&c=qa05-techwriter	Yes	Yes	     
New Job Board	https://qa05.csod.com/ats/careersite/search.aspx?site=8&c=qa05-techwriter	Yes	Yes	     
SoCal Resources	https://qa05.csod.com/ats/careersite/search.aspx?site=3&c=qa05-techwriter	Yes	Yes	     
Student Jobs	https://qa05.csod.com/ats/careersite/search.aspx?site=2&c=qa05-techwriter	Yes	Yes	     
Ventonix Career Site	https://qa05.csod.com/ats/careersite/search.aspx?site=9&c=qa05-techwriter	Yes	Yes	     

 Back


Career Site Settings - Add Connect With Us Link

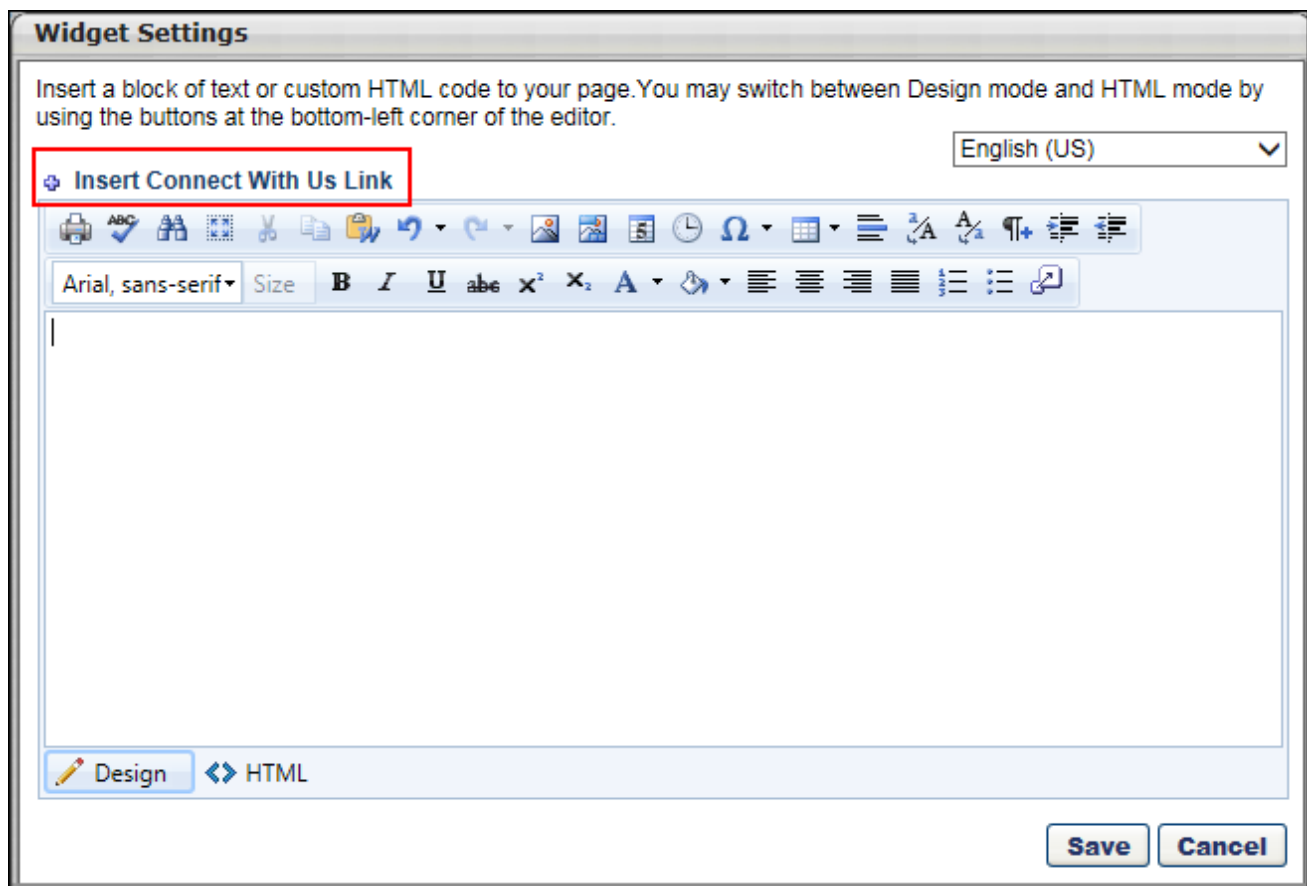
In order for the **Connect With Us** link to appear on the career site for applicants, the link must be added as an HTML widget from the Career Site Settings page.

Permissions

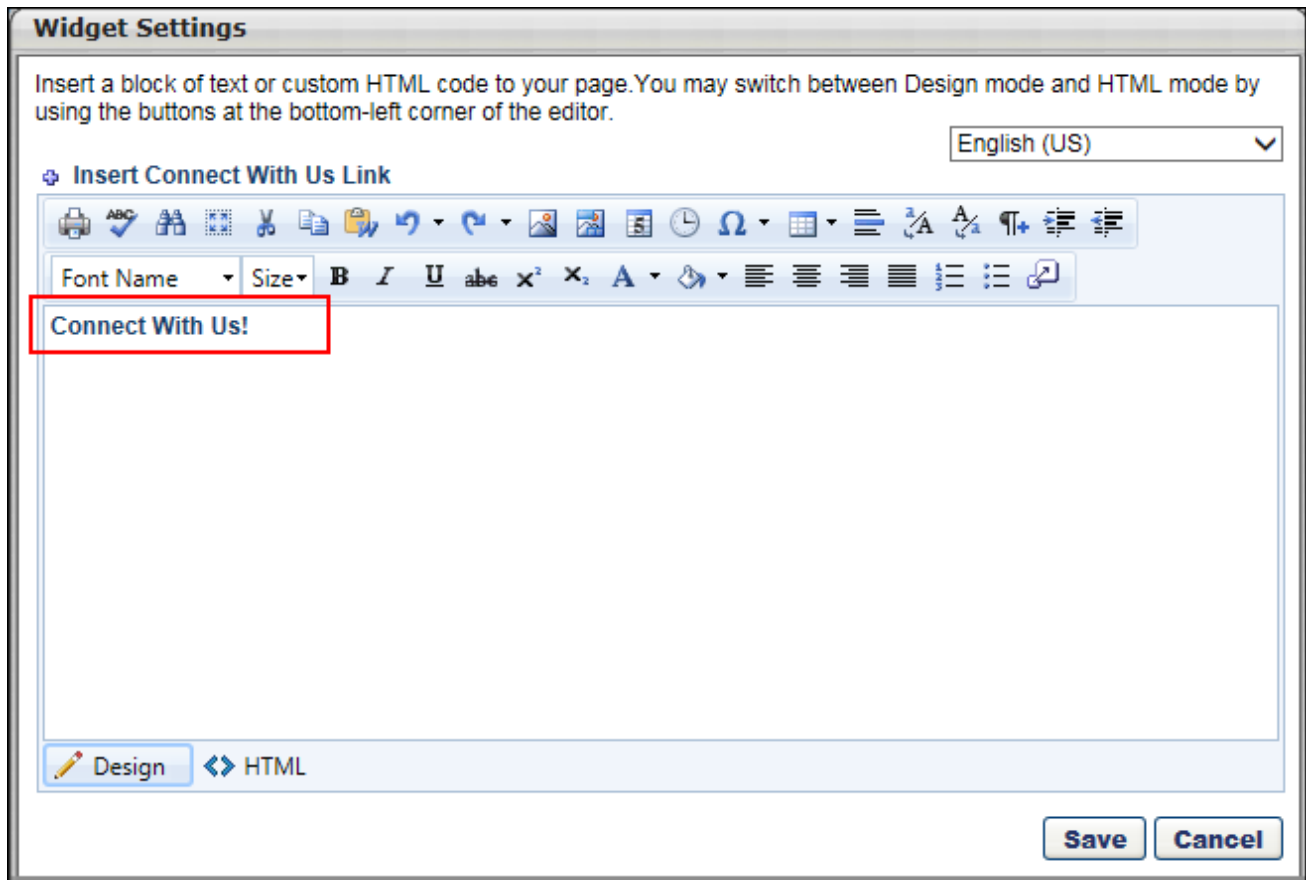
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

To add the link:

1. Open the **Settings** page for the career site.
2. Click the Edit Layout icon  at the bottom of the page. This opens a pop-up window from which you can add the HTML widget.
3. Drag and drop the HTML widget into the widgets section. This opens the Widget Settings pop-up that includes the **Connect With Us** link.



4. Click the **Connect With Us** link in the pop-up. This adds the link to the widget. It is not necessary to add any other text to the widget.



4. Click **SAVE** in the pop-up. This closes the pop-up, and the link displays in the widgets section.




Once you save the career site settings, the link will be visible to applicants on the career site.

Connect With Us Page - Overview

From the Connect With Us page, you can configure the settings for the applicant view of the Connect With Us form on the career site. The page is organized into the following tabs:

- **General** - This tab allows you to select the fields that will display for applicants when applying via Connect With Us. You can also configure the settings for resume parsing and branding. [See Connect With Us Page - General Tab on page 408 for additional information.](#)
- **Areas of Interest** - This tab allows you to configure the areas of interest that applicants can select when applying via Connect With Us. [See Connect With Us Page - Areas of Interest Tab on page 411 for additional information.](#)

To access the Connect With Us page, go to **Admin > Tools > Recruit > Career Site**. Then, click the Edit Connect With Us option  in the Options column.

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

Connect With Us

Import Data

GeneralAreas of Interest

You can use this page to configure the candidate experience on the "Connect with Us" page. You can define which fields are shown and required. You can also define if resume parsing is included and the branding for that page.

Define Fields

Field	Shown	Required
Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resume	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Location	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Areas of Interest	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Resume Parsing

Disable Resume Parsing: ☐ (If checked, the uploaded resume will not be parsed to be saved into the Resume/CV Fields. The text of the resume attachment will still be searchable in Candidate Search. Existing resume data will not be affected.)

Note: Resumes that are submitted using a mobile device will not be parsed.

Branding

☒ Use default branding (or uncheck this box and customize your Connect With Us page below)

Enter Page Title

Enter Text

Select Background Image

View Form

Save

Connect With Us Page - General Tab

From the General tab on the Connect With Us page, you can configure the options in the following sections:

- Define Fields
- Resume Parsing
- Branding

Note: To configure areas of interest, click the **Areas of Interest** tab. To import the Connect With Us settings from another career site, click **Import Data**.

Connect With Us

Import Data

General

Areas of Interest

You can use this page to configure the candidate experience on the "Connect with Us" page. You can define which fields are shown and required. You can also define if resume parsing is included and the branding for that page.

Define Fields

Field	Shown	Required
Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resume	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Location	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Areas of Interest	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Resume Parsing

Disable Resume Parsing: ☐ (If checked, the uploaded resume will not be parsed to be saved into the Resume/CV Fields. The text of the resume attachment will still be searchable in Candidate Search. Existing resume data will not be affected.)

Note: Resumes that are submitted using a mobile device will not be parsed.

Branding

☒ Use default branding (or uncheck this box and customize your Connect With Us page below)

Enter Page Title

Enter Text

Select Background Image

View Form

Save

Define Fields

This section allows you to define the fields that will display on the **Connect With Us form** in the career site in addition to the default first name, last name, and email address fields. The fields that display on the form help recruiters find applicants that have applied via Connect With Us when searching for applicants in Candidate Search Query.

The following fields are available:

- **Phone Number** - This field allows applicants to enter a phone number.
- **Resume** - This field allows applicants to submit a resume.
- **Location** - This field allows applicants to provide their location.
- **Areas of Interest** - This field allows applicants to select their **areas of interest**.

Shown

Check the box in the Shown column to display the field on the Connect With Us form for applicants. This option is checked by default. When unchecked, the field does not display for applicants.

Note: *If you have made changes to the Shown column and would like to preview the form, then you must first click **SAVE** at the bottom of the page in order for the changes to be visible in the preview.*

Required

Check the box in the Required column to require that applicants complete the field. This option is unchecked by default.

Resume Parsing

In this section, you can select to enable or disable resume parsing. The **Disable Resume Parsing** option is unchecked by default. When unchecked, applicant resumes are parsed when they apply via Connect With Us. When checked, applicants will need to manually enter resume data.

Applicants that are submitted via a mobile device will not be parsed, even if resume parsing is enabled.

Branding

In this section, you can select to use the default branding for the Connect With Us form that appears for applicants in the career site. Or, you can define a custom page title, description, and background image.

To define your own branding, uncheck the **Use default branding** option, and then complete the following fields:

- **Enter Page Title** - Enter a title for the page, up to 50 characters.
- **Enter Text** - Enter a page description, up to 1000 characters.
- **Select Background Image** - Click the drop-down to select an image. The images that are available to select are images that have already been uploaded for the portal. The background image displays directly behind the Connect With Us form. A default system image displays if you do not configure a background image.

Note: *You can upload a new image on the **Corporate Preferences** page, depending on your permissions. Then, you can return to the Connect With Us page and select the image from the drop-down. The maximum file size for images is 1MB.*

Apply Directly to Us!

Can't find an open position that fits your specific talent? Then, forget the job search! Use this form to apply directly to our organization. We'll evaluate your submission and let you know as soon as a match opens up!

Select a Country ▼

By submitting this form or by applying through social networks you agree with our terms of service.

[View Terms of Service](#)

Sign Up

View Form

Click **VIEW FORM** to view the form. The form opens in a new tab. When making changes to the form, the changes must be saved before they will appear when viewing the form.

Save

Click **SAVE** to save the Connect With Us settings. This opens a pop-up to indicate that your changes have been saved successfully. Click **OK** in the pop-up to return to the Connect With Us page. Or, click **BACK** to return to the Career Site Management page.

Connect With Us Page - Areas of Interest Tab

From the Areas of Interest tab on the Connect With Us page, you can configure the interests that display for applicants when applying for a job via Connect With Us. Each area of interest that you would like to display on the Connect With Us form must be made active in order for any interests appear.

Note: To configure general settings, click the **General** tab. To import the Connect With Us settings from another career site, click **Import Data**.

Connect With Us







Import Data


General

Areas of Interest

Areas of interest are used to differentiate between Candidates that apply via the Connect With Us page. As you add new interests to the interest bank below, you can select the "Active" checkboxes on this page to define the areas of interest that will be shown as interest options to candidates on the Connect With Us page. The interest bank is the same across different career sites but by selecting the "Active" checkboxes on this page you can define the interests that will be shown on this specific career site. You may use the globe icon to add languages or modify the name for each interest but avoid changing the meaning of the area of interest once you add it because it will change the name of that interest for candidates that have already selected that area of interest.

Interest Bank

<input checked="" type="checkbox"/> Active	Interest Name	
	<input type="text" value="Interest Name"/>	<div>Add</div>
<input checked="" type="checkbox"/>	<input type="text" value="Customer Service"/> 	<div>Delete</div>
<input checked="" type="checkbox"/>	<input type="text" value="Engineering"/> 	<div>Delete</div>
<input checked="" type="checkbox"/>	<input type="text" value="Operations"/> 	<div>Delete</div>
<input checked="" type="checkbox"/>	<input type="text" value="Product Management"/> 	<div>Delete</div>
<input checked="" type="checkbox"/>	<input type="text" value="Quality"/> 	<div>Delete</div>
<input checked="" type="checkbox"/>	<input type="text" value="Sales"/> 	<div>Delete</div>

 View Form

Save

Interest Bank

The Interest Bank displays the areas of interest that you have created. You can activate and inactivate areas of interest and create/delete interests.

The Interest Bank is the same for all the career sites. You can activate/deactivate each interest on each career site if you want to customize the interest list for a particular career site.

When applicants view the areas of interest on the career site, the list displays in alphabetical order.

Add Areas of Interest

At least one area of interest must be added to the Interest Bank and made active in order for interests to display on the Connect With Us form.

To add interests:

1. Enter an interest in **Interest Name** field, up to 50 characters.
2. Click **ADD**.

If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

Activate/Inactivate Interests

Areas of interest are inactive by default. To activate an area of interest, check the box in the Active column.

To inactivate an area of interest, deselect the box in the Active column. Inactive areas of interest do not display on the Connect With Us form for applicants. If the area of interest has been selected by an applicant in the career site, the interest remains visible when viewing the applicant's areas of interest.

Delete Interests

To delete an area of interest, click the **DELETE** button to the right of the interest. This opens a confirmation pop-up. Click **CONFIRM** to delete the area of interest. This removes it from the Interest Bank and across all career sites. The interest will no longer be available in Candidate Search Query, and will also be removed for the applicant from their Applicant Profile page.

Localize Interests

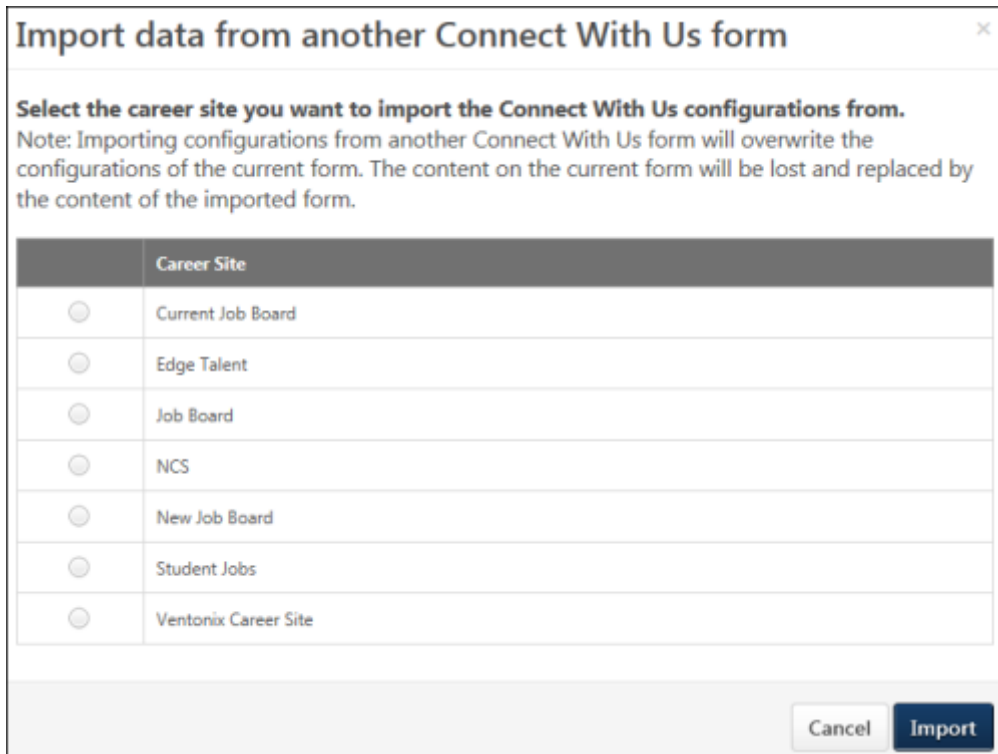
If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

Connect With Us Page - Import Data

The **IMPORT DATA** option allows you to import the Connect With Us settings from a different career site.

To import data:

1. Click **IMPORT DATA**. This opens the *Import data from another Connect With Us form* pop-up.



	Career Site
<input type="radio"/>	Current Job Board
<input type="radio"/>	Edge Talent
<input type="radio"/>	Job Board
<input type="radio"/>	NCS
<input type="radio"/>	New Job Board
<input type="radio"/>	Student Jobs
<input type="radio"/>	Ventonix Career Site

Cancel Import

2. Select the career site from which you would like to import the settings.
3. Click **IMPORT**.

The settings from the selected career site are applied to the Connect With Us page on the current career site. Any existing settings on the current career site are overwritten.

Note: You can undo this action by not clicking **SAVE** on the Connect With Us page.

Compliance Enablement Preferences

With this enhancement, the **Archive applicant data** field and the **Allow applicants to archive their own profiles** field in Compliance Enablement Preferences also pertain to applicants who apply to the organization via Connect With Us. When these options are enabled, Connect With Us applicants are archived based on the settings for these fields so that their applicant data does not stay in the system for an indefinite period of time.

To access Compliance Enablement Preferences, go to **Admin > Tools > Recruit > Compliance Enablement**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compliance Enablement Preferences - Manage	Grants ability to access and manage Compliance Enablement Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

Compliance Enablement Preferences

Define compliance enablement preferences for this Organizational Unit.

☐ Require OFCCP Compliance Enablement functionality

APPLICANTS

The following settings apply to applicants that applied to requisitions within the Organizational Unit. Note: Requisition OU of the applicant is determined by the first application.

☒ Anonymize personal applicant data for New Submissions

☒ Archive applicant data after the period of inactivity

Period of Inactivity Setting

Enter number of days or months for the Period of Inactivity, after which applicant's data will be archived. The Period of Inactivity extends every time applicant logs back in the system.

Archive applicants' data after Days

Number of days to notify applicant via email prior to archiving applicant's data

☒ Allow applicants to archive their own profiles

Email Administration

With this enhancement, a Connect With Us New User 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

Connect With Us New User

ACTION	DESCRIPTION/TRIGGER
Connect With Us New User	<p>This email is triggered when a user submits their information via Connect With Us. The email can be sent to External Users. 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 Management.</p> <p>The email can include a PASSWORD.RESET.URL tag so that applicants can define a password on the career site for their profile.</p>

Email Tags

The following email tags are available for the Connect With Us New User email:

TAG NAME	DESCRIPTION
COMPANY.NAME	Name of the company.
PASSWORD.RESET.URL	Provides link to reset password.
RECIPIENT.FIRST.NAME	Recipient's first name.
RECIPIENT.LAST.NAME	Recipient's last name.

TAG NAME	DESCRIPTION
TODAY'S.DATE	Displays the current date.

Candidate Search Query - Quick/Advanced Search

With this enhancement, filters are added to the Quick Search and Advanced Search tabs on the Candidate Search Query page.

Note: Applicants select areas of interest when applying to the organization via **Connect With Us** from the career site.

To access the Quick Search tab on the Candidate Search Query page, 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

Candidate Search Query

[Reset Search](#)

Quick Search

Advanced Search

All Sources

Country

City, State/Province

25 mi / 40.23 km

Filters

Select Applicant Flag

2 User Types

Select Areas of Interest

Select Last Activity Date

Save Search

Saved Searches

Q Search

Select Areas of Interest Filter

This filter displays on both the Quick Search and Advanced Search tabs. allows you to filter the search results by areas of interest so that you can find candidates with specific interests.

To filter your candidate search by areas of interest:

1. Click the **SELECT AREAS OF INTEREST** drop-down in the Filters section.
2. Check the one or more areas of interest. Or, check the **Select All** box to select all areas of interest.

Once the interests are selected, you can add additional search criteria or click **SEARCH** to conduct the candidate search.

You can also save the search by clicking **Save Search** so that you can quickly find additional or future candidates within those areas of interest.

Select Last Activity Date

This filter only displays on the Quick Search tab. This filter allows you to filter candidates based on last activity date so that you can find candidates by using activity date ranges.

The following options are available in the filter:

- Less than 7 days
- Less than 30 days
- Less than 60 days
- Less than 90 days
- Less than 180 days

Once the last activity date range is selected, you can add additional search criteria or click **SEARCH** to conduct the candidate search.

You can also save the search by clicking **Save Search** so that you can quickly find additional or future candidates within the last activity date range.

Candidate Search Query - Saved Searches

With this enhancement, areas of interest that are defined in the **SELECT AREAS OF INTEREST** filter on the Quick Search or Advanced Search page display on saved searches.

Quick Search Tab

For searches that are saved from the Quick Search tab, the selected areas of interest display in the Search Criteria column.

Saved Searches				
<input type="text" value="What would you like to search for?"/> <input type="button" value="Q Search"/>				
Title	Search Criteria	Created By	Availability	Options
Education and Areas of Interes ... 6/22/2016	education Source: All Sources User Type: Internal, External Areas of Interest: Customer Service, Engineering, Operations, Product ...	Tasha Moore	View Availability Settings	<input type="button" value="v"/>

Advanced Search Tab

For searches that are saved from the Advanced Search tab, the selected areas of interest display in the pop-up when clicking **View Advanced Search Criteria** from the Search Criteria column.

Education and Interests

Search Terms

REQUIRED: Resume/CV > Education > Degree
 MATCH ANY: Associate, Associate degree, Associate Degree/Diploma, Associate's degree, Ba...

Filters

USER TYPE

Internal, External

AREAS OF INTEREST

Customer Service, Engineering, Operations, Product Management, Quality, Sales

OK

Candidate Search Query - Search Results

With this enhancement, an **Areas of Interest** filter is added to the Search panel on the search results page in Candidate Search Query. This filter allows you to narrow the search results by areas of interest so that you can find candidates with specific interests.

In addition, if an applicant has applied to the organization via Connect With Us, and they have selected areas of interest, then their interests display below their user ID in the search results.

Note: Applicants select areas of interest when applying to the organization via **Connect With Us** from the career site.

The screenshot displays the 'Candidate Search Query' interface. On the left is a search panel with various filters. The 'Area of Interest' filter is highlighted with a red box, showing two options: 'Interest - Marketing' and 'Interest - Finance'. The main area on the right lists search results for five candidates. The second candidate, Scott Street, has a red box around the text 'Area(s) of interest: Marketing, Sales' located below his user ID.

Search Panel	Candidate Results
Search All Sources sales First Name Last Name Email Country City, State/Province 25 mi / 40.23 km USER TYPE APPLICANT FLAGS Area of Interest <input type="checkbox"/> Interest - Marketing <input type="checkbox"/> Interest - Finance	Marc Altimeras External ma@gmail.com Position: Sales Manager Location: Columbus OH, United States, 43212 Organization: Johnson Buick Pontia...
	Scott Street Internal 310-752-2500 scottstreet@gmail.com Position: Customer Care Special... Location: Santa Monica CA, United States, 90404 Manager: Not Defined User ID: cmarcus@gmail.com Area(s) of interest: Marketing, Sales
	Julie Cook External jc@us1.com Position: Product Manager Location: Baltimore MD, United States, 21202 Organization: Company, Inc.
	George Rodriguez External gr@gmail.com Position: Sales Manager Location: Columbus OH, United States, 43212 Organization: Johnson Buick Pontia...
	Edith Keeler Internal 404-888-9877 ekeeler@gmail.com Position: Retail Salesperson Location: Kendall CA, United States, 06037 Manager: Rebecca Carter

Career Site - Connect With Us

The Connect With Us page allows applicants to apply to an organization directly, rather than applying to a specific job requisition. Applicants fill out the form and submit their information. Once submitted, applicants can be emailed when a position that is seen as a good fit for the applicant opens in the organization.

To access the Connect With Us page, applicants click the **Connect With Us** link, which displays under the career site name on the career site homepage.

Note: *The name of the Connect With Us form may vary, depending on the **administrator's configuration of the form**. The form description and background image may also vary.*

The **APPLY WITH LINKEDIN** and **APPLY WITH SEEK** buttons are only available if enabled by the administrator. Applicants can click the button to use their LinkedIn or Seek profile to apply to the organization. This opens a pop-up that allows the applicant to log in to their LinkedIn or Seek profile.

Release Notes as of October 5 (Build 16.04.00.105)

by the administrator on the **Connect With Us** page), then the applicant's LinkedIn or Seek profile serves as their resume.

Applicants can modify their parsed data in the Connect With Us form fields, and then click **SIGN UP** to apply to the organization, which also creates a profile for the applicant in the career site and a user in your portal.

Note: *Using one of these options does not allow an applicant to apply directly to a job requisition. These options are only used to provide applicant data for the Connect With Us functionality.*

Note: *If the administrator has disabled the option to parse the resume, then the applicant's LinkedIn or Seek profile data does not automatically populate the Connect With Us form fields. The applicant will need to fill out the fields manually, including attaching a resume, if the option to include a resume is enabled by the administrator.*

Duplicate Applicant Prevention

For existing applicants who already have a profile in the career site but who attempt to apply with their LinkedIn or Seek profile via Connect With Us, a message will display to indicate that they are already connected with the organization. This prevents applicants from creating duplicate profiles.

Form Fields

Complete the following fields on the Connect With Us form. Some fields may not be available if they are disabled by the administrator when configuring the **Connect With Us** page.

- **First Name** - Enter your first name, up to 100 characters.
- **Last Name** - Enter your last name, up to 100 characters.
- **Email** - Enter the email address you would like to associate with your profile and use when logging in to the career site. The character limit for this field is 100.
- **Phone** - Enter the phone number you would like to use as your contact number, up to 30 characters.
- **City** - Enter your city name, up to 35 characters.
- **State** - Enter your state, up to 30 characters.
- **Select a Country** - Select a country from the drop-down.
- **Zip Code** - Enter your ZIP Code, up to 20 characters. This field is optional.
- **Select Areas of Interest** - Click the drop-down and check all areas of interest that apply to you. The areas of interest are a feature that recruiters use to search for applicants for open positions. The list displays in alphabetical order.
- **Resume** - Drag and drop your resume file to the field. Or, click **SELECT A FILE** to upload a resume.

Click **SIGN UP** to submit the form. This opens a Thank You page, from which you can create a profile in the career site.

Applicant Profile - View Areas of Interest

For applicants who apply to the organization via Connect With Us, an **Areas of Interest** field is added to the header section of the Applicant Profile page. This field displays the applicant's areas of interest, if defined by the applicant when applying to the organization via Connect With Us.

Applicant Flags

With this enhancement, a new Connect With Us applicant flag is added. This flag indicates that an applicant has applied via Connect With Us. The flag color is orange.

The Connect With Us flag displays in the following areas of the Applicant Tracking System (ATS):

- Applicant Profile > Snapshot
- Candidate Search Query
- Manage Applicants
- Resume/CV Page

The Connect With Us flag is a default flag that is automatically added to the **Applicant Flag Bank** with this enhancement. The flag is visible to all users and cannot be deleted or modified.





Applicant Flags Preferences

Flags

The flags defined below can be applied to applicants or applications. Flags removed from this OU will prevent users from adding the removed flags; this, however, will not affect any flags that have already been assigned to an applicant or application.

[Add Flag](#)
[Manage Applicant Flag Bank](#)

(9 Results)

Color	Name	Description	Type	Ability To View	Options
	Best Fit	Defines applicants who are the best fit for the position.	Applicant	All Users Can View, Candidate Search	 
	Connect With Us	Defines applicants that submitted their information via Connect With Us	Applicant	All Users Can View, Candidate Search	

Application Source

When applicants apply to the organization via Connect With Us, the source will display as "Career Site Name." The source appears in the following areas of the Applicant Tracking System (ATS):

- Manage Requisitions > Manage Applicants
- Manage Requisitions > Manage Applicants > Applicant Profile
- Manage Requisitions > Manage Applicants > Applicant Profile > PDF of application
- Manage Requisitions > Manage Applicants > New Submissions
- Manage Requisitions > Requisition Snapshot

Hiring Dashboard

Hiring Dashboard Overview

The Hiring Dashboard provides hiring team members visibility into their requisitions, applicants, and other tasks all from a single page. The dashboard is organized by widgets that allow hiring managers, recruiters, and requisition approvers to drill into specific details of their own requisitions and applicants. This simplifies their processes for finding requisition and applicant data, reduces clicks, and avoids the need to learn or remember how to navigate through the system to find information or perform actions.

Use Cases

Approval Workflow

1. Rachel is a manager who has open requisitions to fill multiple positions on her team.
2. Rachel goes to the Hiring Dashboard to check the status of her open requisitions.
3. Since Veronica, her recruiter, recently accepted Rachel's requisition request from her own Hiring Dashboard, Rachel now also sees an approval notification and approves the draft of the requisition that Veronica just created so that Veronica can post it.

New Submission Processing and Requisition Approval

1. Veronica is a recruiter who has open requisitions pertaining to multiple hiring managers.
2. Veronica goes to the Hiring Dashboard to check on her open requisitions, ensuring that her applicant pipeline is healthy.
3. She notices that she has a few dozen new submissions for her highest-priority requisition. She screens them, moves them into In Review status, and notifies Rachel (a hiring manager) that there are new applicants for Rachel to review.
4. Veronica also sees that she has two requisitions to approve and post, as well as a new requisition request that Rachel has just submitted for Veronica's approval.

Viewing Another Person's Hiring Dashboard

1. Rachel's manager, Jeff, is an executive who is interested in the progress Rachel and Veronica are making on filling the open positions on Rachel's team.
2. Since Jeff is not on the hiring team for Rachel's requisitions, those requisitions do not appear on Jeff's own Hiring Dashboard.
3. Instead, he switches to view Rachel's Hiring Dashboard in read-only mode so that he can see an overview of the talent pipeline from Rachel's perspective.
4. Jeff also notices that most of Rachel's applicants are in an In Review status, so he asks Rachel to ensure that she spends more of her time over the next few days reviewing applicants to get them into the interview process.
5. Meanwhile, Brianna, the Recruiting Manager to whom Veronica reports, switches from her own Hiring Dashboard to look at Veronica's dashboard. Brianna notices that Veronica has quite a few pending requisition approvals which are preventing urgent requisitions from being posted to the career site.
6. Brianna also sees that, there are few candidates in a New Submission status for one of the company's most critical vacancies, indicating that she and Veronica may need to intensify their outreach efforts in order to bring more candidates into the pipeline.

Considerations

If an organization has previously configured a custom Recruiting tab within the navigation bar, the Hiring Dashboard option may appear under a new tab within the navigation bar. The Hiring Dashboard option can be moved to the previously configured custom Recruiting tab or any other tab via Navigation Tabs and Links. [See *Navigational Tabs and Links*](#).

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard at all times; without this permission, access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager). This permission cannot be constrained.	Recruiting
Hiring Dashboard: View Other Dashboards	Grants the ability to view other users' dashboards. While viewing another user's dashboard, no actions can be taken on behalf of the dashboard owner. User also needs access to their own Hiring Dashboard before accessing other dashboards using this permission. This permission can be constrained by OU, User's OU, User, and User's Subordinates.	Recruiting

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition Details Report	Grants access to the Requisition Details report, which displays details of requisitions in the portal.	Reports - 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	Recruiting

	<p>constrained.</p> <p>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.</p>	
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>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.</p> <p>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.</p>	Recruiting

Roles

The following permission is added to the Recruiting - Admin role:

- Hiring Dashboard: Manage
- Hiring Dashboard: View Other Dashboards (**Note:** This permission will initially be assigned without constraints. All Recruiting – Admin users will have read-only access to basic requisition information and applicant counts on the dashboards of users across all organizational units (OU) unless the permission is constrained after the release.)

Hiring Dashboard Page - Overview

The Hiring Dashboard provides hiring team members visibility into their requisitions, applicants, and other tasks all from a single page. The dashboard is organized by widgets that allow hiring managers, recruiters, and requisition approvers to drill into specific details of their own requisitions and applicants.

To access the Hiring Dashboard, go to **RECRUIT > HIRING DASHBOARD**.

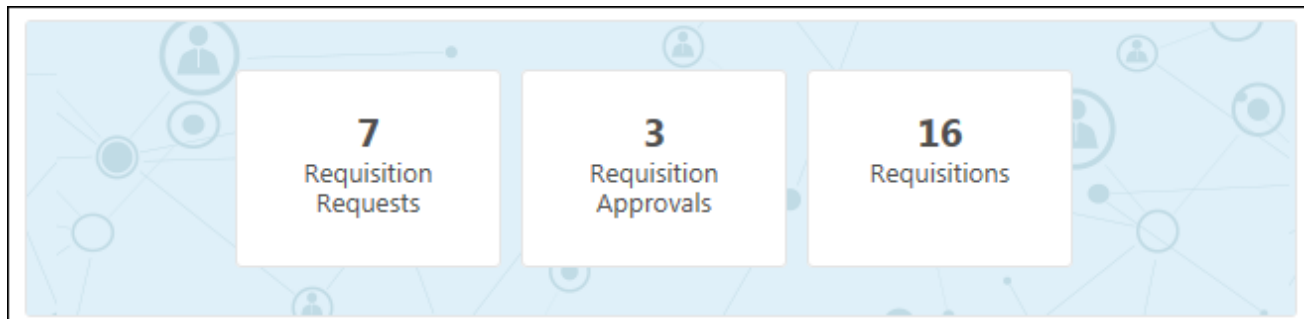
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard at all times; without this permission, access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager). This permission cannot be constrained.	Recruiting
Hiring Dashboard: View Other Dashboards	Grants the ability to view other users' dashboards. While viewing another user's dashboard, no actions can be taken on behalf of the dashboard owner. User also needs access to their own Hiring Dashboard before accessing other dashboards using this permission. This permission can be constrained by OU, User's OU, User, and User's Subordinates.	Recruiting
Requisition Details Report	Grants access to the Requisition Details report, which displays details of requisitions in the portal.	Reports - Recruiting
Requisition: Owner	<p>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.</p> <p>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</p>	Recruiting

	when editing a requisition.	
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>Note: <i>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.</i></p> <p>Note: <i>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.</i></p>	Recruiting

Dashboard Heading

The top of the dashboard displays the number of requisition requests, requisition approvals, and requisitions. This provides a quick look at the number of items that are on your dashboard so that you do not have to look further down or apply filters to see the details if you only want a high-level summary of the information on the page.



View Another Person's Dashboard

This option allows you to access another person's dashboard so that you can understand the status of that person's requisitions, approvals, and applicants. This option only displays for users with permission to view another user's dashboard. See [View Another Person's Dashboard](#) on page 445 for additional information.

Approvals

The Approvals widget displays a list of all pending approval items that are awaiting the dashboard owner's action. Actions can be taken directly from the dashboard to process pending items. [See **Approvals Widget** on page 434](#) *for additional information.*

Applicants

The Applicants widget displays applicant submission and status data as an aggregate for all of your active requisitions. You can also create a Requisition Details Report from this widget, provided that you have permission to run the report. [See **Applicants Widget** on page 438](#) *for additional information.*

Requisitions

The Requisitions widget lists all of your requisitions. From this widget, you can view basic information about your requisitions and the distribution of applicants across the status types for the requisition. Users with permission to manage requisitions or requisition owners can access the Edit Requisition page for the requisition to view and change the requisition configurations, unless they are viewing another person's dashboard, in which case everything is read-only and not clickable. [See **Requisitions Widget** on page 441](#) *for additional information.*


Approvals Widget

The Approvals widget displays all job requisitions and requisition requests that are pending your approval. This widget mirrors the functionality available in the Universal Profile > Actions > Requests Tab. Users with permission to approve requisitions (listed as a Requisition Approver in a requisition's hiring team) can approve/deny job requisitions. Users identified in Admin > Recruit > Requisition Requests as requisition request approvers can approve/deny requisition requests. Actions can be taken directly from the dashboard to process pending items.

Permissions


PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard at all times; without this permission, access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager). This permission cannot be constrained.	Recruiting
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile

Approvals (10)
Show All ▾




Accounting Manager
 Date Submitted: 1/7/2015 Primary Owner: Tasha Moore
 Status: Open - Pending Re-Approval ID: req3

✗
✓



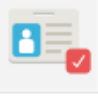
Accounting Manager
 Date Submitted: 1/7/2015 Primary Owner: Tasha Moore
 Status: Open - Pending Re-Approval ID: req3

✗
✓



Project Manager
 Date Submitted: 4/1/2016 Requested By: Susan Baum
 Status: Pending

🔍



Accounting Manager
 Date Submitted: 6/14/2016 Primary Owner: Tasha Moore
 Status: Pending Approval ID: req34

✗
✓

1
2
3

1 to 4 of 10

Approvals Heading

The Approvals Heading is only visible to users with permission to view request items.

The Approvals heading displays as a link. Clicking **Approvals** opens your Universal Profile page. **Note:** *When viewing another user's dashboard, the Approvals heading is not clickable.*

The number to the right of the Approvals heading displays the number of pending approval actions.

Filter

The following options can be selected in the filter drop-down to filter the list of pending items:

- **Show All** - This option is selected by default. When selected, all pending items display.
- **Requisition Approval** - Select this option to show only job requisition approvals in the list.
- **Requisition Request** - Select this option to show only requisition request approvals in the list.


Pending Approval Items

The pending approval items display in order of oldest to newest submitted date. An item only displays here if it is pending your approval.

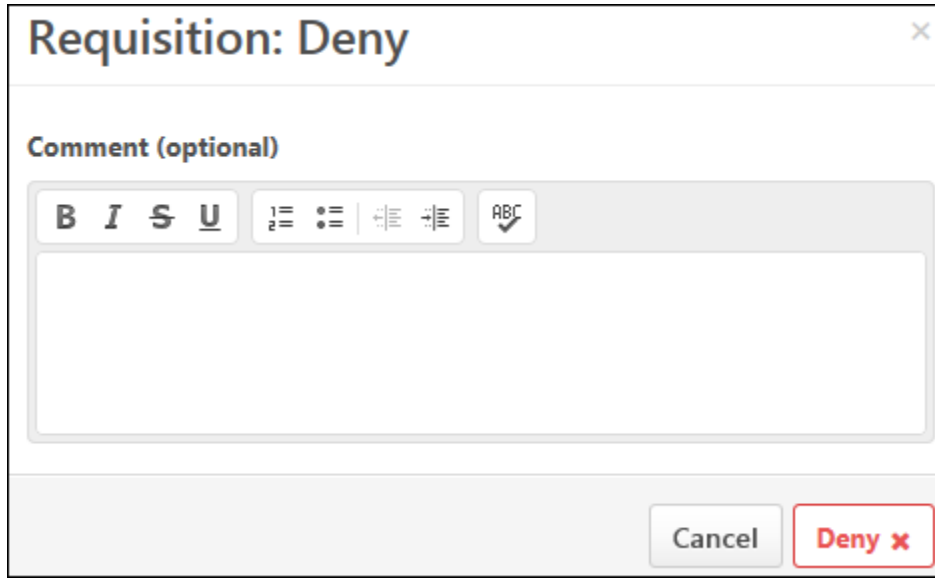
The following information displays for pending approval items:

- **Icon** - An icon displays for each pending approval item. The icon displays a red checkmark for Requisition Approvals. A blue plus sign displays for Requisition Request Approvals.
- **Title** - The title of the item is clickable. Click the title to open the Edit Requisition or Requisition Request page. You can modify the requisition if the requisition is in an editable status. ***For more information about editable fields based on requisition status, see the Edit Job Requisition topic in Online Help.***
Note: *As with existing functionality, the visibility of custom fields on a requisition is based on the availability settings for the field in Custom Field Administration.*
- **Date Submitted** - This displays the date on which the item was submitted.
- **Primary Owner** - This displays the primary owner of the item.
- **Requested By** - This field only displays for Requisition Request Approvals. The field displays the name of the person who requested the requisition.
- **Status** - This displays the approval status of the item. The statuses that display are dependent upon the approval status options for **requisitions** and **requisition requests**.
- **ID** - This field only displays for Requisition Approvals. The field displays the requisition ID.


Deny Approval

Click the deny button  on the Hiring Dashboard to deny approval. This opens the deny pop-up. You can enter comments about your approval decision in the Comment box, up to 2,000 characters. Click **DENY** to process the denial.

Once you have submitted your approval decision, the pending action item is removed from your Hiring Dashboard page.



Approve Item

Click the approve button  on the Hiring Dashboard to approve the item. This opens the approve pop-up. You can enter comments about your approval decision in the Comment box, up to 2,000 characters. Click **APPROVE** to process the approval. Once you have submitted your approval decision, the pending action item is removed from your Hiring Dashboard page.

Requisition: Approve ×

Comment (optional)

B I ~~ABC~~ U **Bulleted List** **Numbered List** **Indent Left** **Indent Right** **ABC**

Review Requisition Request

Click the Review Requisition Request button  to open the View Requisition Request page. This allows you to view a read-only version of the requisition request.

As with existing functionality, you can decline or create the request from the View Requisition Request page. Once you have submitted your approval decision, the pending action item is removed from your Hiring Dashboard page.

*For more information about declining and creating requisition requests, see the **[Review/Decline/Accept Requisition Request](#)** topic in Online Help.*

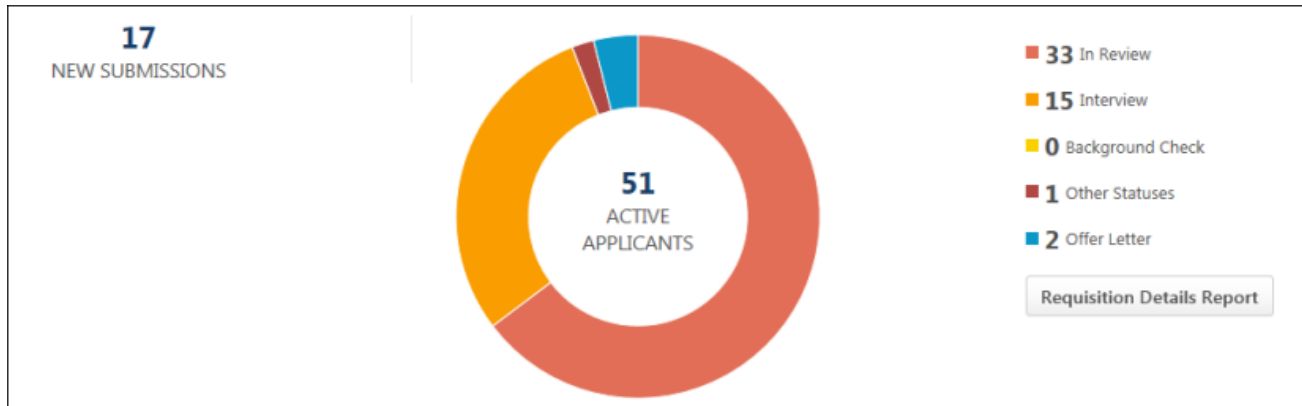
Applicants Widget

The Applicants widget displays applicant submission and status data as an aggregate for all of your active requisitions. You can also create a Requisition Details Report from this widget, provided that you have permission to run the report.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard at all times; without this permission, access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager). This permission cannot be constrained.	Recruiting
Hiring Dashboard: View Other Dashboards	Grants the ability to view other users' dashboards. While viewing another user's dashboard, no actions can be taken on behalf of the dashboard owner. User also needs access to their own Hiring Dashboard before accessing other dashboards using this permission. This permission can be constrained by OU, User's OU, User, and User's Subordinates.	Recruiting
Requisition Details Report	Grants access to the Requisition Details report, which displays details of requisitions in the portal.	Reports - 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	Recruiting

*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.*



New Submissions

This section only displays for users with access to the New Submissions page. This section displays the number of new submissions, which is the total number of applicants that are in a New Submission status for the requisitions for which you are part of the hiring team.

For users with permission to manage requisitions or for requisition owners, click the linked number of new submissions to open the Manage Requisitions page.

Active Applicants

The Active Applicants ring chart displays the total applicant count for the requisitions for which you are part of the hiring team. Each color bar in the chart represents a different applicant status category as represented in the Requisitions widget. The size of the ring segment is dependent upon the number of applicants in the status in relation to the total number of active applicants. Hover over a segment to view the number of applicants in the status.

For users with permission to manage requisitions or for requisition owners, click the linked number of active applicants to open the Manage Requisitions page. All status filters except Closed or Hired are automatically selected.

Statuses

The status breakdown for the Active Applicants ring chart displays to the right of the chart. The list shows each status and the total number of applicants in each status.

Requisition Details Report

This option only displays for users with permission to create Requisition Details Reports. Click the **REQUISITION DETAILS REPORT** button to open and create a new Requisition Details Report.

*For information about creating this report, see the **Requisition Details Report** topic in Online Help.*

No Active Applicants or New Submissions

If there are no active applicants, then the Active Applicants ring chart and list of statuses does not display. Instead, "0 Active Applicants" displays as a link. Clicking the link opens the Manage Requisitions page.

If there are no New Submissions, then "0 New Submissions" displays as a link. Clicking the link opens the Manage Requisitions page.

In either case, the **REQUISITION DETAILS REPORT** button still displays and is clickable.

Requisitions Widget

The Requisitions widget lists requisitions for which the user is a requisition owner or applicant reviewer (including hiring manager). From this widget, you can view various submission, status, and interview data. You can also access the Edit Requisition, Manage Applicants, Manage Job Requisitions, and New Submission pages for the requisition.

The requisitions that display are requisitions that are in a status of Open, Pending Approval, Pending Re-Approval, Approval Denied, and On Hold.

Note: *Requisitions that are in a Canceled, Closed, or Draft status do not display in the Requisitions widget.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard at all times; without this permission, access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager). 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	<p>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.</p> <p>Note: <i>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.</i></p>	Recruiting

Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>Note: <i>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.</i></p> <p>Note: <i>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.</i></p>	Recruiting
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REQUISITIONS (7)							
Principle Software Engineer Openings: 10 of 10 unfilled ID: req12909 Created: 4/13/2016 Status: Open	0 New Submissions	1 In Review	5 Interview	3 Background Check	N/A Other Statuses	3 Offer Letter	12 Active Applicants
Database Architect Openings: 10 of 10 unfilled ID: req13932 Created: 5/24/2016 Status: Pending Approval							
Lead Product Manager Openings: Ongoing ID: req12852 Created: 9/25/2015 Status: Open	2 New Submissions	1 In Review	1 Interview	0 Background Check	N/A Other Statuses	1 Offer Letter	3 Active Applicants
Senior QA Analyst Openings: 10 of 10 unfilled ID: req1252 Created: 8/26/2014 Status: Open	0 New Submissions	1 In Review	0 Interview	0 Background Check	N/A Other Statuses	1 Offer Letter	2 Active Applicants
							<div>1 2</div> <div>1 to 4 of 7</div>

Requisition Priority

The requisitions display in order of high to low priority, and then by the creation date. The priority appears as a color bar on the left edge of the requisition card.

- **Red** - This color indicates high priority.
- **Yellow** - This color indicates medium priority.
- **Gray** - This color indicates low priority.

Total Number of Requisitions

The number in parentheses to the right of the Requisitions heading displays the total number of requisitions for which you are an owner or reviewer (including hiring manager) and which are not in a Closed or Canceled status.

Requisition Detail Cards

The following information displays for each requisition card:

- **Title** - This displays the Display Job Title. For requisition owners with permission to manage requisitions, click the title of the requisition to open the Edit Requisition page. You can modify the requisition if the requisition is in an editable status. **For more information about editable fields based on requisition status, see the Edit Job Requisition topic in Online Help.** **Note:** *As with existing functionality, the visibility of custom fields on a requisition is based on the availability settings for the field in Custom Field Administration.*
- **Openings** - This displays the number of unfilled openings out of the total number of openings. For requisitions that are configured as Do Not Allow to Apply, the **Openings** field displays "Not available to apply." For requisitions that are configured with ongoing openings, the **Openings** field displays "Ongoing."
- **ID** - This displays the requisition ID.
- **Created** - This displays the date on which the requisition was created.
- **Status** - This displays the requisition status. The following statuses display:
 - Denied
 - On Hold
 - Open
 - Open - Pending Re-Approval
 - Pending Approval
- **New Submissions** - This displays the number of applicants that are in the New Submission status. For users with permission to manage requisitions or requisition owners, click the linked number to open the New Submissions page.
- **Status Type Count** - The number of applicants within each status category displays to the right of the requisition details. Interview custom status types are added to the Interview status category. If a standard status type is not configured for the requisition, then "N/A" displays for the status count.

Hover over the status type to view the applicant count for each sub-status that is associated with the status category.

The following status categories are linked:

- **In Review** - Clicking the In Review status type or count opens the Resume/CV Review page with the In Review applicants listed. For archived applicants, the Resume/CV Review page indicates that the applicant is archived and that their resume cannot be reviewed.
- **Background Check/Interview/Offer Letter/Other Statuses** - Clicking the status type or count opens the Manage Applicants page, which is pre-filtered to show the applicants in the status category that was clicked.

Note: *For requisitions in a Pending Approval status, the status category counts do not display. The status category counts also do not apply to requisitions that are configured as Do Not Allow to Apply. If a user is not a requisition owner for a requisition in the Requisitions list, New Submissions does not display in the status type count.*

Note: *If there are no applicants in a status category, then the status type is not clickable.*

- **Active Applicants** - This displays the number of applicants for the requisition. Clicking the linked number opens the Manage Applicants page, which is filtered to show all applicants except those in a Hired or Closed status.

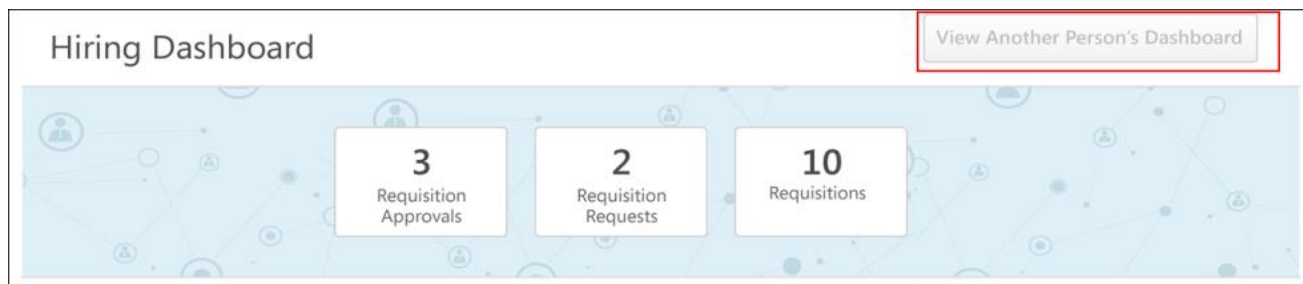
View Another Person's Dashboard

From the Hiring Dashboard page, you can access another user's dashboard. Viewing another user's dashboard helps you understand the status of that person's requisitions, approvals, and applicants.

The **VIEW ANOTHER PERSON'S DASHBOARD** button only displays for users with permission to view another user's dashboard. **Note:** *Giving users permission to access other users' dashboards may allow the user to access basic information about requisitions, applicant statuses, and approvals that the user would not otherwise be able to see elsewhere in the Applicant Tracking System (ATS). This permission should be used with caution.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard at all times; without this permission, access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager). This permission cannot be constrained.	Recruiting
Hiring Dashboard: View Other Dashboards	Grants the ability to view other users' dashboards. While viewing another user's dashboard, no actions can be taken on behalf of the dashboard owner. User also needs access to their own Hiring Dashboard before accessing other dashboards using this permission. This permission can be constrained by OU, User's OU, User, and User's Subordinates.	Recruiting



View Dashboard

To view another dashboard:

1. Click the **VIEW ANOTHER PERSON'S DASHBOARD** button. This opens the *Select a user* pop-up. Users are available to select based on constraints, if any, applied to the *Hiring Dashboard: View Other Dashboards* permission.
2. Search for a user from the pop-up.

3. Click the user's name. This opens their dashboard as read-only, with all of the same information that would be displayed to the dashboard owner upon loading their dashboard, except that no links are clickable.

Back to My Dashboard

To return to your own dashboard, click the **Back to My Dashboard** link at the top of the page.

Offer Letter SSO E-Signature

Offer Letter SSO E-Signature Overview

With this enhancement, internal applicants at organizations that use Single Sign-On (SSO) will now be able to sign offer letters electronically using their SSO user credentials. Allowing electronic signatures using SSO credentials for offer letters means that organizations can truly use paperless offer letters for all applicants, whether external or internal.

Prior to this enhancement, organizations that use SSO were only able to leverage the electronic signature functionality of offer letters for external applicants. The functionality was not available for internal applicants because employees did not always have or were not aware of their user credentials. Following this enhancement, internal applicants will be able to submit an offer letter acceptance by entering their full name, system email address, and system password.

Use Cases

1. Rachel has internally applied and interviewed for the position of Marketing Manager. She receives an offer letter for her efforts.
2. Rachel decides to accept the offer letter.
3. She electronically signs her offer letter by re-authenticating with her credentials that she uses to log in to the portal.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Center - View	Enables users to view the Career Center, including Resume, Career Preferences, Career Pathing and Job Search, depending on enabled components and preferences. This permission also enables users to view the Internal Job Search widget on the Welcome Page and custom pages. This is an end user permission.	Talent/Succession


Electronically Sign Offer Letter - Internal Applicants

Internal applicants can now sign offer letters using their Single Sign-On (SSO) credentials. Offer letters are electronically signed from the Career Center > Applications tab.

To sign an offer letter using SSO:


1. Go to **Career Center > Applications**. **Note:** *Internal applicants can also electronically sign offer letters from their My Profile page in the career site if you are using the career site for internal applicants.*
2. Click the **LAUNCH** button for the offer letter in the My Tasks panel.

Career PathSearch Other JobsApplicationsRefer Jobs



My Tasks


Show Completed

Task Title	Description/Instructions	Position Title	Date Assigned	Options
 Offer Letter June 2016	Offer Letter [Version 1]: Please review and submit this offer letter for employment.	Senior Accountant (req9)	6/27/2016	Launch

This opens the offer letter pop-up. As with existing functionality, you can view the offer letter by clicking the linked title of the offer letter.

Offer-Offer Letter June 2016
✕

Instructions :
Please review and submit this offer letter for employment.

Offer Letter :
 **Offer Letter June 2016**

Additional Attachments :
None

Response :
Decision : Select ▼

3. Select "Accepted" in the **Decision** field. Depending on the administrator's configuration of the SSO Authentication Preferences, you will see authentication fields or only a **SIGN** button. The fields that display are dependent upon the settings configured in the portal

for the SSO log-in screen. **Note:** *As with existing functionality, if you click "Declined," then you can select a reason for the decision, if a reason is available. You can also enter a note in the **Notes** field. Then, click **SUBMIT** to submit your decision.*

4. Complete the authentication fields, if the fields display for you.
5. If you see a "Sign" button, click **SIGN**. This will take you to the SSO log-in page for your portal.
6. If you see a "Submit" button, click **SUBMIT**. This will take you to the SSO log-in page for your portal.

Onboarding

Support User Types and Statuses

For portals that have Onboarding enabled and User Types and Statuses, a User Type section is added to the Applicant Profile > Launch Onboarding page. This section allows you to define the user type and user subtype, if applicable, for the onboarding user.

In addition with this enhancement, the user status for external applicants will change from Onboarding to Working on their onboarding start date. The user status for internal applicants changes to Working on their onboarding start date.

To access the Launch Onboarding page, click **Launch Onboarding** from the **Options** drop-down on the Applicant Profile page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Manage Onboarding	Allows user to launch the onboarding process from applicant to employee and view onboarding progress from the Applicant Profile. This permission can be constrained by OU and User's OU.	Employee Onboarding
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	<p>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.</p> <p>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.</p>	Recruiting

Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>Note: <i>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.</i></p> <p>Note: <i>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.</i></p>	Recruiting
Users - Edit Users Type and Status	Enables administrator to view and modify the type and status information for a user via the User Record. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

[Use Case](#)

Peter has hired two new hires and is about to launch their onboarding. Evan is an external applicant and Irene is an internal applicant. Peter launches onboarding for both Evan and Irene. He defines the user types and subtypes for Evan and Irene in the User Type section of the Launch Onboarding page.

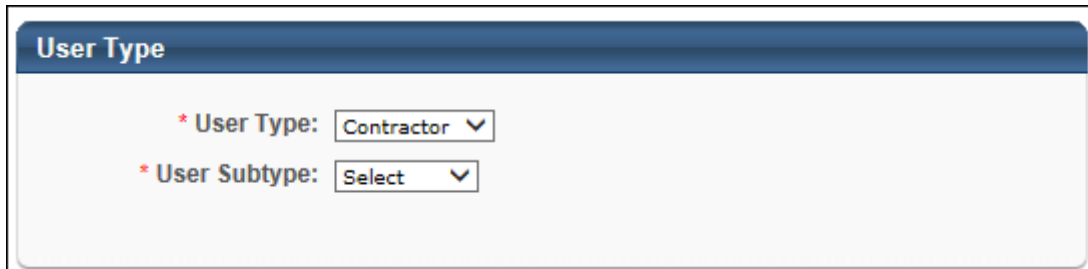
Evan - External Applicant

- Evan will be a full-time employee, so his user type is defined as Employee and his user subtype is defined as Full-Time.
- On the date that onboarding is launched, Evan moves into the user type Employee and user subtype Full-Time. His user status is also updated to Onboarding, as he is not yet actively working prior to his start date.
- On Evan's start date, his user status is updated to Working, as he is a full-time employee that is actively working.

Irene - Internal Applicant

- Irene is making a transition to become a part-time contractor. Her user type is defined as Contractor and her user subtype is defined as Part-Time.
- On the date that onboarding is launched, there is no change to Irene's current user type and subtype, and her user status remains as Working, as she is still actively working during her onboarding period prior to her start date.

- On Irene's start date, her user type is updated to Contractor and her user subtype is updated to Part-Time. Her user status remains Working, as she continues to actively work.

A screenshot of a web form titled "User Type" in a blue header bar. Below the header, there are two required fields, each marked with a red asterisk. The first field is labeled "* User Type:" and has a dropdown menu with "Contractor" selected. The second field is labeled "* User Subtype:" and has a dropdown menu with "Select" selected.

User Type

The **User Type** field requires you to define the user type for the onboarding employee. The user types that display in the drop-down are the system-defined user types. Select a user type from the drop-down to define the user type.

Once the onboarding user reaches their onboarding start date, they are moved into the user type/subtype that is defined in the User Type section.

User Subtype

The **User Subtype** field only displays if subtypes have been configured for the user type. To define a subtype, select an option from the drop-down. This is a required field.

User Status

With this enhancement, when external applicants reach their onboarding start date, their user status changes from Onboarding to Working.

Canceled Onboarding for External Applicants

If onboarding is canceled for external applicants, then the user type that was defined on the Launch Onboarding page is removed. This allows external applicants to have the appropriate user type of external applicant when onboarding is canceled.

In addition, the user's status is also canceled so that the external applicant returns to being an external applicant instead of a user in the system.

Recruiting Usability Enhancements

The following usability improvements are made to the Applicant Tracking System (ATS):

- **Manage Applicants Page Scroll Bar** - While viewing the Manage Applicants page, the user can see both the horizontal and vertical scroll bars in the table at the same time, rather than having to scroll to the bottom of the table in order to see the horizontal scroll bar.
- **New Permission for Deleting Languages** - A new *Localization: Delete Language* permission is added to limit the ability to delete a language in a job requisition. Only users with this permission will be able to see the delete icon in the Requisition Language pop-up from the **Localized Language** option on the **General tab** of the requisition. This permission is added to the Recruiting - Admin and Recruiting - Manager role.

Note: As part of the February 2016 release, the ability to delete localized languages was tied to another permission to edit fields in the requisition. This enhancement is intended to decouple the ability to delete a language by creating a separate permission, in the event that the administrator would prefer for users to only be able to delete languages **or** edit fields in the requisition.

Note: As part of existing functionality, if the **Allow Minimum Qualifications modification after a Requisition is opened** option is disabled in Compliance Enablement Preferences, then languages cannot be deleted.

- **Remove Broadbean Posting** - When a job requisition is closed or canceled in the ATS, the posting will now be removed from Broadbean. The posting will no longer be visible to applicants so that they no longer see invalid job postings.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Localization: Delete language	Grants access to delete languages for a requisition. This permission cannot be constrained.	Recruiting

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

Requisition: Owner	<p>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.</p> <p>Note: <i>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.</i></p>	Recruiting
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p>Note: <i>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.</i></p> <p>Note: <i>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.</i></p>	Recruiting

Talent Pool Redesign Auto-upgrade

With the April 2016 release, user experience managing and interacting with Talent Pools was improved by redesigning and enhancing the user workflows.

With this enhancement, Talent Pools are now available for clients with Succession and/or Recruiting. The redesign matches old Talent Pools functionality, including the ability to add candidate from new Candidate Search Query and from Manage Applicants, as well as be able to add candidate to requisition, to group OU, and to Nomination List.

Implementation

With this release, all portals are automatically upgraded to the new Talent Pools functionality.

Web Service Job Requisition Custom Field (New)

With this enhancement, a new Job Requisition Custom Field REST web service is now available. This web service provides custom field data for a job requisition via REST Web Services.

Input Parameters

This web service has the following input parameters:

DATA FIELD	TYPE	DESCRIPTION
ReqId	String	This is required. This is the ID of the requisition for which the administrator is requesting data.
format	Enum	This is optional. This is the format in which the data should be returned. The options for this field are JSON and XML.

Implementation

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

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

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

ATS in Multi-Module Report

With this enhancement, sections and fields from the Recruiting Custom Report are now available in the Multi-Module Custom Report.

A common reason to run a Multi-Module Custom Report with Recruiting fields is if there is a desire to understand correlations between applicants' submission source and their subsequent performance within the organization, as measured by data such as performance review ratings or test scores. You can use the data to draw conclusions as to where the organization should keep looking in order to find people who have potential for high performance.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Multi-Module Report - Create	Grants ability to create and edit custom Multi-Module reports. This permission works in conjunction with other Custom Report - Create permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Multi-Module Report - View	Grants ability to view results of custom Multi-Module reports created by self. This permission works in conjunction with other Custom Report - View permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Recruiting Report - Create	Grants ability to create and edit Custom Recruiting reports. This permission can be constrained by Division, Position, Location, and User's Direct Subordinates.	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, Location, and User's Direct Subordinates.	Reports - Analytics

Recruiting Sections

The following sections are available, along with all associated standard and custom fields for each section:

- Applicant - **Note:** *This section includes Recruiting-specific user fields that are not currently in the User section of the Multi-Module Custom Report. The Applicant section has also been added to the Recruiting Custom Report.*
- Application Forms
- Applications

- Compliance Questions
- Cost Tracking
- External Assessments
- Pre-Screening Questions
- Recruiting Agency
- Requisition

Permissions/Data Availability

The permission for creating Recruiting custom reports is not needed in order to view the Recruiting Module of the Multi-Module Custom Report. However, even if the user has permission to view the Recruiting Module and add the fields to the Multi-Module Custom Report, the data that is visible in the report is dependent upon the permissions needed to view the data within the system.

Permission Constraints

The constraints for the Multi-Module report permission apply to the Recruiting Module section of the report. Constraints for the Multi-Module Custom Report are based on the organizational unit (OU) of the user listed in the report results, whereas constraints for Recruiting Custom Reports are based on the OU of the job requisition to which the user applied. Thus, if the permissions for Recruiting Custom Reports and Multi-Module Custom Reports have the same constraints configured, then the data displayed in the two report types can still differ.

Example

		RECRUITING CUSTOM REPORTS		
		Yes, No Constraints	Yes, Constrained	No
Multi-Module Report	Yes, No Constraints	Has access to all OU's	Security Concern	Will not have access to Recruiting fields
	Yes, Constrained	Security Concern	Security Concern	Will not have access to Recruiting fields
	No	Cannot access MMR	Cannot access MMR	Will not have access to Recruiting fields

		RECRUITING CUSTOM REPORTS		
		Yes, No Constraints	Yes, Constrained	No

		RECRUITING CUSTOM REPORTS		
Multi-Module Report	Yes, No Constraints	Has access to all OU's	Different data in Custom Recruiting Report and Multi-Module Custom Report	Will not have access to Recruiting fields
	Yes, Constrained	Different data in Recruiting Custom Report and Multi-Module Custom Report	Different data in Custom Recruiting Report and Multi-Module Custom Report	Will not have access to Recruiting fields
	No	Cannot access MMR	Cannot access MMR	Will not have access to Recruiting fields

The following are options that are available to the administrator in order to mitigate any undesired reporting:

- Remove access to the Multi-Module Custom Report from people who normally use Recruiting Custom Reports with constraints who should not be using Multi-Module Custom Reports.
- Remove access to Recruiting Custom Reports from people who use Multi-Module Custom Reports but do not need to use Recruiting Custom Reports (this would leave them with access to Multi-Module Custom Reports, but the Recruiting module would not be available in the report).
- Remove constraints on Recruiting Custom Reports so the user can run both reports.

External Applicants Consideration

External applicants who were hired but who did not become internal users through the Manage Hired Applicants page will not have their internal data tied with external data. This means that the Multi-Module Custom Report will not be useful for external applicants, because internal data cannot be tied to the user as a result of their 's internal account being created in a different way and not having the same user name as the external applicant data.

New Fields in Recruiting Custom Reports

With this enhancement, new fields are added and existing fields updated in the Applicant and Requisition sections of Recruiting Custom Reports.

Note: As part of a separate enhancement for the July '16 release, Recruiting fields are now available for Multi-Module Custom Reports. For more information about this enhancement, see **ATS in Multi-Module Reports** in Online Help.

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, Location, and User's Direct Subordinates.	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, Location, and User's Direct Subordinates.	Reports - Analytics

Applicant Section

The following field is added to the Applicant section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Applicant (User) Opt Out flag	Displays candidates who have opted out of being considered for other positions. Indicates "Yes" or "No" on the report output. This field may have blank values if applicants were loaded to the system via the Data Load Wizard. Limitation Note: <i>This field does not apply to users who have created accounts but have not yet applied for a job. This field will only show for users who have submitted an application.</i>	Text

Requisition Section

The following fields are added/modified in the Requisition section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Requisition Date Posted	This is an existing field that is updated with this enhancement. This field no longer only reports on the active job boards; it now will report dates for	Date

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
	job boards in all types of statuses.	
Requisition Posting - Job Board - Clicks	Number of clicks that a job posting received on specific job boards.	Numeric
Requisition Posting - Job Board - Language	Languages in which a job requisition was posted in to specific job boards.	Text
Requisition Posting - Job Board - Type	Type of job board posting.	Text

Succession

Job Pool Succession Report Permissions

Prior to this enhancement, the Custom Job Pool Succession Report was tied to the permissions associated with the Custom Succession Report.

With this enhancement, two additional permissions are now available, the Custom Job Pool Succession Report - Create and Custom Job Pool Succession Report - View permissions. With the addition of these permissions, administrators can assign permissions to apply exclusively to Job Pool Succession Report. This allows for the creation of a separate group of users for the Succession Custom Report and Job Pool Succession Report.

Implementation

This functionality is automatically enabled for all organizations using the Succession module.

Upon release, the Custom Succession Report Create and View permissions no longer grant the ability to create and view Custom Job Pool Succession Reports. Administrators must assign the new permissions to users requiring access to the Custom Job Pool Succession Report.

Security

The following new permissions apply to this functionality:

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

The following existing permissions no longer grant the ability to create and view Custom Job Pool Succession Reports:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Succession Report - Create	Grants ability to create and edit Custom Succession Management (SMP) Reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User's Subordinates.	Reports - Analytics
Custom	Grants ability to view results of Custom Succession	Reports -

Succession Report - View	Management (SMP) Reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User's Subordinates.	Analytics
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Rich Text Editor in Resume Description

Rich Text Editor in Resume Description

Prior to this enhancement, administrators could not format the description text for resume sections, so the resume section descriptions displayed as one paragraph. At times, this made the description difficult to read.

With this enhancement, a rich text editor is now available when editing the description text for resume sections. This enables administrators to structure and format resume section descriptions more effectively. HTML formatted text can be added to resume section descriptions. If Universal Profile is being used, then this description is displayed on the Resume tab of Universal Profile. If Universal Profile is not being used, then this description is displayed in the Career Center.

Use Cases

Kellie is an administrator for Springfield University. She wants to encourage faculty members to populate their resume data so that it can be used in succession planning and performance reviews. For that, Kellie needs to provide clear and easy-to-read instructions so that it is easy for faculty members to complete their resumes. Kellie would like to create formatted resume section descriptions to help employees enter their Academic Portfolio.

Considerations

The character limit for the resume section description is unchanged.

This functionality does not apply to external applicants' resume screen, as the resume section description is not displayed on the external resume screen.

Implementation

This functionality is automatically enabled for all organizations using the Succession Module.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Resume Administration	Grants access to resume administration, which enables configuration of resume sections, including custom resume fields. This permission cannot be constrained. This is an administrator permission. Note: <i>This permission does not apply to the Universal Profile - Resume functionality.</i>	Talent/Succession - Administration

Resume - Add Section

With this enhancement, the **Description** field now utilizes a rich text editor, which enables administrators to utilize more formatting options when setting the description for a resume section.

To add a resume section, go to **ADMIN > TOOLS > SUCCESSION MANAGEMENT > RESUME**. Then, click the **Add Section** link.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Resume Administration	Grants access to resume administration, which enables configuration of resume sections, including custom resume fields. This permission cannot be constrained. This is an administrator permission. Note: <i>This permission does not apply to the Universal Profile - Resume functionality.</i>	Talent/Succession - Administration

Define Section

Define the title, directions, and attributes for this section. You may choose to permit users to edit their own position history manually, or have them automatically update based on OU changes. If you choose to have them update automatically, you must determine the display order of the OUs.

Title:

Directions:

B *I* U

Design
HTML

SECTION LAYOUT

Employee Resume Display:

Use the guide below to determine the layout of each field in this Resume section. The "Preview" button in the next panel will allow you to see a sample section with the chosen layout options. The following are best practice guidelines and suggestions for the most optimal layout:

- Placing fields in both positions in a row is not required
- A field should not be placed in an even-numbered position if there is not a field in the preceding odd-numbered position
- If there are fields in both positions in a row, the "Display Field Name" preference should be checked for both
- If the "Scrolling Text Box" field type is used, it should be the last, odd-numbered position of the section, with nothing in the subsequent even-numbered position

1.

2.

3.

4.

[Preview](#)

FIELDS

Determine the fields that will be available to end users when completing this section of the Resume. Custom fields may be added. A max of 30 fields may be available for the section.

DEFAULT POSITION	NAME	DISPLAY FIELD NAME	TYPE	REQUIRED	ACTIVE	OPTIONS
Save	Cancel					

Resume Page

When a user is viewing the Resume page, they are able to view the formatted text. This applies whether accessing the Resume page via the Universal Profile or Career Center.

To access the Bio - Resume page, go to **HOME > UNIVERSAL PROFILE**. Click the Bio tab. Then, click the Resume subtab. **Note:** *The location of this link is configurable by your system administrator.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	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
Bio Resume - View	Enables user to view the Bio - Resume page for users within their permission constraints. If a user does not have permission to view the Bio - Resume page, then the Resume tab is not available. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User's Direct Reports, User's Self, and User.	Universal Profile

Talent Pool Redesign Auto-upgrade

With the April 2016 release, user experience managing and interacting with Talent Pools was improved by redesigning and enhancing the user workflows.

With this enhancement, Talent Pools are now available for clients with Succession and/or Recruiting. The redesign matches old Talent Pools functionality, including the ability to add candidate from new Candidate Search Query and from Manage Applicants, as well as be able to add candidate to requisition, to group OU, and to Nomination List.

Implementation

With this release, all portals are automatically upgraded to the new Talent Pools functionality.