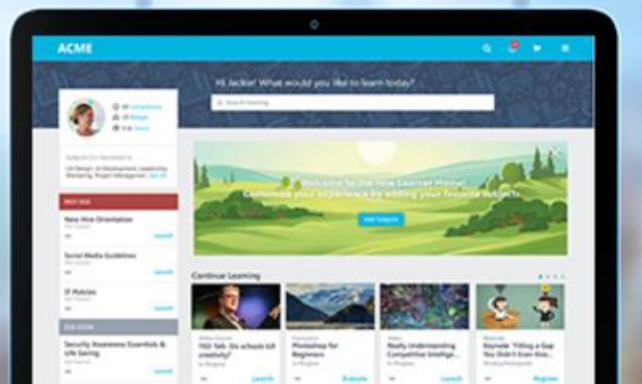


AUGUST 2017 PRODUCT RELEASE

Delivering
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Experiences



Cornerstone August 2017 Release Notes

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What's New for August '17

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](#).*
- **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 August '17 Release](#) on page 27 for additional information.*
- **New Custom Reporting Fields** - This topic provides a list of all custom reporting fields that are newly added with this release. *See [Master List of New Report Fields - August '17 Release](#) on page 31 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 35 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 August '17 release as of 13 July 2017:

Benchmark Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Benchmark	Benchmark	Yes	With the Benchmark platform, released in June 2017, organizations can compare and visualize their performance across key HR metrics with other organizations based on their industry, region, and size, using up-to-date, accurate and consistent data across all of Cornerstone's clients, and across Cornerstone's extensive talent management product lines.

Compensation Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Configurable Merit Matrix	Configurable Merit Matrix		With this enhancement, when creating adjustment guidelines for a merit increase, a new editable recommendation matrix is now available. This new matrix option enables administrators to completely configure a merit matrix using compa-ratio and performance scores in order to be more specific with recommendations. Organizations have the option to continue using the previously existing Recommendation Matrix option or use the new Editable Recommendation Matrix option.

Core Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Data Load Wizard - Display Threshold	Data Load Wizard - Display Threshold		With this enhancement, the Data Feed Email Log and Track Data Loads Preview now state if the file was not processed due to threshold limit. This enables administrators to better understand when a file is not properly loaded due to the error threshold being reached. This also enables administrators to understand that no records were updated because the error threshold was reached.
End of IE9 Support (October '17 Release)	End of IE9 Support (October '17 Release)		In order to keep up with browser security requirements and the latest software enhancements, Cornerstone will discontinue support for Microsoft Internet Explorer (IE) 9 with the October 2017 release. Please reach out to your IT

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			department and make plans to convert to one of the compatible browsers prior to October 2017.
Universal Profile Navigation Tabs Redesign	Universal Profile Navigation Tabs Redesign		With this enhancement, some elements of the Universal Profile pages are redesigned, including the navigation tabs, the breadcrumbs, and the page titles and descriptions. This provides a consistent experience across all Universal Profile pages and enables users to more easily navigate between Universal Profile pages when accessing them from a mobile device.
View People - Custom Field Availability Fix	View People - Custom Field Availability Fix		With this enhancement, availability rules will be respected by Succession, OU and User Record custom fields in View People. The custom fields that display in filters, the Color By drop-down, and on the large view of the user cards will be based on a user's availability to view the field and its value. If a user at any point does not meet the availability criteria for a custom field, then the field and value will not appear.

Cornerstone HR

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Configurable Field Validations	Configurable Field Validations		With this enhancement, organizations using Cornerstone HR can now control the format in which data is entered in Short Text Box or Scrolling Text Box type user record custom fields. This enables organizations to ensure better data quality and consistency across the organization, which in turn gives

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			organizations more confidence to allow end users and managers to enter user information for themselves.
Time and Attendance Integration - Kronos	Time and Attendance Integration - Kronos		<p>With the February 2017 release, the Kronos Time and Attendance integration was made available via the Edge Marketplace, and this integration enabled users to use Single Sign On (SSO) to log in to Kronos from the Cornerstone HR system.</p> <p>With this release, basic user profile information is now synchronized from the Cornerstone HR system to Kronos user profiles. When a new user is added to the Cornerstone HR system, the user will automatically be added to the organization's Kronos system as well. In addition, when an existing user is updated in the Cornerstone HR system, the user's profile is updated in the organization's Kronos system.</p>

Edge Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Cornerstone REST API Enhancements	Cornerstone REST API Enhancements	No	<p>With this enhancement, the following updates are made to services within the Cornerstone API:</p> <ul style="list-style-type: none"> ○ Job Applicant API custom fields return ○ Job Requisition

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			API language parameters <ul style="list-style-type: none"> ○ Format Type Header enhancements ○ GetOU Service enhancement ○ SetUser Username Validation
Format Parameter Deprecation in October '17 Release	Format Parameter Deprecation in October '17 Release	No	In the October '17 Release, the ability to specify the format parameter in the query string will be deprecated in the October 2017 Release. Please ensure that your teams update the web service requests to use the "content-type" parameter in the HTTP header before the October '17 Release (10/27/2017) to maintain uninterrupted service.
Open Access to API Explorer	Open Access to API Explorer	No	With this enhancement, the API Explorer is publicly available and can be accessed both by current Cornerstone clients and by outside users.
Recruiting Integrations in Edge - August '17 Release			The following Recruiting integrations are

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>available in Edge with the August '17 release:</p> <ul style="list-style-type: none"> ○ Accurate Background Check - See Accurate Background Check Integration Enhancements <i>on page 413 for additional information.</i> ○ IBM Assessment - See IBM Assessment Integration Overview <i>on page 476 for additional information.</i> ○ Quest Diagnostics Drug Screening - See Quest Diagnostics Drug Screening Integration Overview <i>on page 509 for additional information.</i> ○ SmashFly - See SmashFly Integration Overview <i>on page 531 for additional information.</i>

Engage Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Campaign Status Enhancements	Campaign Status Enhancements	No	<p>With this enhancement, Engage administrators can do the following:</p> <ul style="list-style-type: none"> ○ Quickly view and manage campaigns that are in the queue and ready to launch ○ Review the details of closed campaigns, which helps design follow-up campaigns ○ Delete draft campaigns, which prevents unneeded campaigns from cluttering the Engage Library
Engage Actions	Engage Actions	No	<p>With this enhancement, in addition to the email link and mobile distribution methods, Engage administrators can also distribute surveys via the Actions page of users' Universal Profiles.</p>
Engage Filter and Reporting Enhancements	Engage Filter and Reporting Enhancements	No	<p>With this enhancement, the Engage Dashboard features improved filtering and reporting functionality, which makes it easier to extract meaningful data collections from employee feedback.</p>
Engage	Engage	Yes	<p>With the Engage platform, released in June 2017, administrators can create and schedule recurring, continuous feedback campaigns to capture satisfaction and engagement feedback from employees using mobile or web devices. Engage can be used to measure employees on three dimensions: Satisfaction, Engagement, and Commitment, allowing organizations to continue fostering a productive workplace.</p>
Mobile Engage	Mobile Engage	No	<p>With this enhancement, a mobile</p>

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Widget	Widget		widget for Engage surveys is available on the Cornerstone mobile application, allowing users to quickly access company surveys using their mobile devices.

Learning Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Catalog Connector API - AICC Course Integration with LCMS Vendors	Catalog Connector API - AICC Course Integration with LCMS Vendors	Yes	With this enhancement, a streamlined course loader API is available for transferring content automatically between content vendors and the Cornerstone platform. With this API, 3rd party AICC courses are automatically synchronized to the course catalog, and the administrators do not need to manually upload them to the system.
Content Security Enhancements	Content Security Enhancements	Yes	With this enhancement, it is possible to control whether or not the LMS permits the upload of Flash-based courses, and the SCORM 1.2 session ID for online courses can be automatically encrypted upon configuration.
Create Child Sessions Permission	New "Create Child Sessions" Permission	No	With this enhancement, in portals where the backend setting to allow multiple providers is enabled, users with the permission to view ILT sessions can NOT create child sessions for a provider unless they also have the new permission to create child sessions. Users who only have the permission to view

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			sessions are limited to a read-only view of ILT sessions.
Custom Reporting - Learning Fields	Custom Reports - Learning Fields	No	With this enhancement, custom reporting has been enhanced to include the addition and improvement of several fields related to the Learning module.
Learning Assignment Tool - Ability to Copy Emails	Learning Assignment Tool - Ability to Copy Emails	No	With this enhancement, all email settings, including custom emails and ad hoc emails, are copied when a learning assignment is copied, and any portals which retained old proxy enrollment functionality due to an exception are automatically upgraded to the learning assignment tool.
Learning Experience Platform (LEP) - Learner Home	Learning Experience Platform (LEP) - Learner Home	No	With this enhancement, users have access to a single learning hub called the Learner Home. This page facilitates a seamless learning experience for users, allowing them to browse for and request relevant training, search and filter for specific training, and helps ensure compliance by helping users prioritize and take action on training they must complete. The Learner Home includes several features which enable learners to easily select subjects of interest, discover training based on machine learning, and quickly access and request new training.
Learning Experience Platform (LEP) - Learning Search	Learning Experience Platform (LEP) - Learning Search	No	With this enhancement, users have access to the Learning Search page, which is a fast-performing, mobile-optimized search page that provides learners with an engaging

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			learning exploration experience. The Learning Search page provides a collection of filters which allow users to find training they want to take, and also provides access to transcript and training tiles which allow users to quickly resume existing training or request new training.
Offline Player New Version	Offline Player (New Version)	No	<p>With this enhancement, the following fixes have been made to a new version of the Offline Player:</p> <ul style="list-style-type: none"> ○ Offline Player can be used through a network proxy without receiving an error ○ The total time recorded for training is accurately recorded ○ Special characters can be used in usernames and passwords without producing an error when users log into the Offline Player
Online Course Pop-Up Blocker Enhancement	Online Course Pop-Up Blocker Enhancement	No	With this enhancement, the system recognizes whether the browser's pop-up blocker is activated, and if so, prompts learners to click on a message which then opens the online course.
Roster Completion Date Modification Audit Trail	Roster Completion Date Modification Audit Trail	No	With this enhancement, when an administrator modifies a user's completion date for a session, the exact date and time that the change occurred is recorded in the audit trail history.
xAPI Learning Reporter - Full Rollout	xAPI Learning Reporter - Full Rollout		With this enhancement, the Learning Reporter is no longer in beta, and the following features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			have been added: <ul style="list-style-type: none"> ○ The Learning Reporter can operate on multiple browser types ○ Multiple languages are supported by the Learning Reporter ○ When the Learning Reporter widget is viewed in a language that is read from right to left, the widget features are aligned to the right of the widget ○ Users can view which version of Learning Reporter they are using

Mobile Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Language Detected Login	Language Detected Login		With this enhancement, mobile application login pages are localized based on the default language of the user's device. As previously implemented, after the user is logged in, the application is displayed based on the portal's language configuration for the user.
Login Page UI Enhancements	Login Page UI Enhancements		Minor enhancements have been made to the Cornerstone mobile application's login pages for an updated look and feel.

Performance Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Custom Reports - Goal Fields	Custom Reports - Goal Fields		A Goal Creation Date field is now available in the Goals section when creating a custom Goals report or a multi-module custom report. In addition, a Target Stretch and Target Threshold field are now available in the Targets section when creating a custom Goals report. This enables organizations to obtain additional context when reporting on goals.
English (UK) Language Pack Update	English (UK) Language Pack Update		With this enhancement, for the English (UK) language pack, the term "Goal" is updated to "Objective" throughout the system, including Custom Reports and Manage Shared and Dynamic Goals. This creates a consistent experience for users of the English (UK) language pack.
Performance Review Distribution Report - Z-Score Calibration	Performance Review Distribution Report - Z-Score Calibration		With this enhancement, organizations can select specific cohorts and see a performance review z-score, which provides insight into how a particular reviewee is performing relative to the average of their team, division, location, or position.
End User Performance Pages UI Redesigns	End User Performance Pages UI Redesigns		With this enhancement, the Scheduled Tasks, Launch Off Cycle Review, and Performance Review Summary pages are redesigned to help administrators execute their workflows in a more pleasing user interface. There are no functional changes to the page, only an update to the look and feel of the page.
Universal Profile: Snapshot Widgets	Universal Profile: Snapshot Widgets		With this enhancement, the Snapshot: Competencies, Snapshot: Development Plans, and Snapshot: Reviews pages are now responsively designed so that

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Responsive UI Design	Responsive UI Design		users can easily view and use these pages from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size.

Recruiting and Onboarding Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Accurate Background Check Integration Enhancements	Accurate Background Check Integration Enhancements		With this enhancement, an applicant's references data will be passed to Accurate Background Check when a background check is performed on an applicant.
Active Fields by Requisition Template	Active Fields by Requisition Template		With this enhancement, administrators can now hide certain fields on the General tab when configuring requisition templates. The fields will still appear on the requisition template for administrators, but they will not appear for recruiters when creating a requisition using the template.
Applicant Feed	Applicant Feed		The new Applicant Feed page provides a single page view of an applicant's entire history of events and comments from the most recent 20 requisitions related to the applicant. This allows recruiters to only have to access one page in order to view this data.
Applicant Profile Enhancements	Applicant Profile Enhancements		Additional enhancements to the Applicant Profile page are being

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			made with this release to enable recruiters perform actions, such as adding applicants to requisitions and talent pools, through a simpler and more effective process from the applicant's profile.
Custom Reports - Onboarding Fields	Custom Reports - Onboarding Fields		With this enhancement, new fields are added to Onboarding Custom Reports.
Custom Reports - Recruiting Fields	Custom Reports - Recruiting Fields		With this enhancement, new fields are added and modified for Recruiting Custom Reports and Multi-Module Reports.
Data Deletion to Support Data Privacy - Enhancements for Recruiting (Invite-Only Beta)	Data Deletion to Support Data Privacy - Enhancements for Recruiting (Invite-Only Beta)		<p>With this enhancement, should your organization choose to enable the Data Deletion functionality, job applications for applicants who were not hired will be deleted when one of the following occurs:</p> <ul style="list-style-type: none"> ○ The period between the date on which the requisition is moved into a Closed status and the current date has exceeded the data retention period. ○ The period between the date that the applicant was dispositioned and the current date has exceeded the data retention period.
Data Load Wizard - Job Requisition Template	Data Load Wizard - Job Requisition Template		In order to support the Active Fields by Requisition Template enhancement, the visibility of the job requisition template fields is configured on the requisition template. In addition, the Job

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			<p>Requisition Template Data Load Template is enhanced to include the following additional information under the Helpful Hints tab. “NOTE: Visibility of these fields will be configured using the "Manage Field Visibility" pop-up on the requisition template. You must have relevant permission to manage Requisition Template page.”</p>
<p>FADV Background Check Integration Enhancements Overview</p>	<p>FADV Background Check Integration Enhancements Overview</p>		<p>With this enhancement, additional requisition and candidate data will be passed to First Advantage (FADV) so that the data does not need to be entered manually in FADV by the administrator and applicant.</p>
<p>IBM Assessment Integration</p>	<p>IBM Assessment Integration</p>		<p>IBM Assessment is a third party assessment vendor that provides assessments for Recruiting.</p>
<p>Password Preferences for Candidate Profile Creation</p>	<p>Password Preferences for Candidate Profile Creation</p>		<p>With this enhancement, the password rules that are configured at the top level Division Organizational Unit (OU) are respected and displayed to applicants when they create an account on the career site. This ensures that applicants meet the minimum password requirements that are defined for users in your organization.</p>
<p>Preboarding Organizational Unit Configurations</p>	<p>Preboarding Organizational Unit Configurations</p>		<p>The Preboarding Organizational Unit Configurations page enables administrators to manage and configure preboarding organizational units (OU) for new hires. The page lists all of the preboarding OUs that have been</p>

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			created. From here, you can edit, copy, and delete the preboarding OUs.
Preboarding OU Configurations Auto-Upgrade with October 17 Release	Preboarding OU Configurations Auto-Upgrade with October '17 Release		Preboarding OU Configurations will be auto-upgraded with the October '17 Release. After the auto-upgrade, the Preboarding Organizational Units Enablement section will not be visible on the Onboarding Workflows page.
Quest Diagnostics Drug Screening Integration	Quest Diagnostics Drug Screening Integration		Quest Diagnostics (Quest) is a third party vendor that provides drug screenings for Recruiting.
Requisition Enhancements	Requisition Enhancements		With this release, requisition enhancements are made for requisition templates, requisitions, and requisition requests.
Requisition Request UI Redesign	Requisition Request UI Redesign		<p>With this enhancement, the pages for configuring and managing requisition requests are redesigned to improve the look, feel, and functionality of the process. All pages for configuring requisition requests now appear as top-row tabs. Prior to this enhancement, the pages for configuring requisition requests appeared as a list of tabs on the left-side of the page.</p> <p>In addition, the user interface (UI) design for the Requisition Request pages for submitters and reviewers is updated to match the current look and feel of the system.</p>
SmashFly Integration	SmashFly Integration		SmashFly is a Recruitment Marketing and Candidate Relationship Management (CRM)

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			solution. SmashFly helps you find, initiate and nurture candidate relationships so you both can better determine fit before hire to reduce costs, improve engagement, and increase retention.
Start Onboarding Enhancements	Start Onboarding Enhancements		With this enhancement, administrators can now limit the onboarding process to only applicants who are in a Hired status. In addition, the original hire date on the user record will reflect the hire date value on the Start Onboarding page.
Updates to Equal Employment Opportunity Preferences	Updates to Equal Employment Opportunity Preferences		With this release, the Record EEO field is moved from Requisition and Applicant Preferences to Compliance Enablement Preferences. This change allows administrators to manage both of the EEO Category preferences (Record EEO and Require EEO Job Categories) at the Location Organizational Unit (OU) level. This ensures that the EEO Category field only appears on requisitions where it is relevant based on location.

Succession Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Employee Relationship in Succession Task	Employee Relationship in Succession Task		With this enhancement, the SMP Manager Task is renamed to Employee Relationship Succession

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Assignment	Assignment		Task. In addition, the Employee Relationship Succession Task can be assigned to Manager, Indirect Manager, Dotted Line Manager, and other custom relationships that are defined in Employee Relationships Administration. This enables organizations to engage more employees in succession planning activities.
"Manager" Task & Template Renamed "Employee Relationship"	"Manager" Task & Template Renamed "Employee Relationship"		With this enhancement, a Succession manager task can now be assigned to Manager, Indirect Manager, Dotted Line Manager, and other custom relationships that are defined in Employee Relationships Administration. As a result, the Manager task and template is renamed to Employee Relationship.
Org Chart & List View in Employee Relationship Task	Org Chart & List View in Employee Relationship Task		With this enhancement, users who are completing an employee relationship task can switch the Org Chart view between hierarchy and list. This enables the user to view the organizational structure in a way that is the most helpful to them. When an administrator configures an Org Chart template for an Employee Relationship task, they can configure which org chart display type (chart or list) is displayed by default.
Succession Task Redesign New Task Auto-Upgrade	Succession Task Redesign New Task Auto-Upgrade		With the August 2017 release, all succession tasks that are created following the release are automatically upgraded to the new design.
Universal Profile: Succession Snapshot Responsive UI	Universal Profile: Succession Snapshot Responsive UI		With this enhancement, the Snapshot: Succession pages are now responsively designed so that the users can easily view and manage

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Redesign	Redesign		employee ratings and successors from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size. In addition, enhancements have been made to the Snapshot: Succession functionality:

New and Enhanced Permissions for August '17 Release

New Permissions

The following permissions are new for the Aug '17 release:

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
Benchmark	Benchmark - Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration
Cornerstone HR	User Record Custom Field Configurable Validations - Manage	Grants ability to manage the configurable validations for user record custom fields within Custom Field Administration. This permission cannot be constrained. This is an administrator permission. This permission is only available to organizations that are using Cornerstone HR.	Core Administration
Engage	Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage
Engage	Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
Engage	View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage
Learning	Default Training Image Preferences	Grants access to Default Training Image Preferences page where an administrator can configure custom default images for training by type.	Learning - Administration

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
		This permission cannot be constrained. This is an administrator permission.	
Learning	Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning
Learning	Learner Home Preferences	Grants access to the Learner Home Preferences page, where the administrator can configure the arrangement of content on Learner Home, as well as other settings. This permission can be constrained by organizational unit (OU) and User's OU. This is an administrator permission.	Learning - Administration
Learning	Sessions - Create Child Sessions	Grants ability to create new instructor led training child sessions available with multiple providers. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission.	Learning - Administration
Onboarding	Preboarding Organizational Units - Manage	Grants ability to access and manage Preboarding OU Configurations. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration
Recruiting	CRM Integration - Manage	Grants ability to manage Recruitment Marketing actions on the Manage Requisitions page. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration

Enhanced Permissions

The following existing permissions are enhanced for the Aug '17 release:

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
Core	Bio About - View	Enables user to view the Bio page for	Universal Profile

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
		<p>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. Note: <i>For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.</i></p> <p>With the Aug '17 release, this permission also allows end users to view the Completions & Hours field, the training sidebar, and the Continue Learning carousel on the Learner Home page.</p>	
Core	Snapshot - Badges	<p>Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i></p>	Universal Profile

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
		<p>With the Aug '17 release, this permission also allows end users to view the Badges field on the Learner Home page.</p>	
Learning	Events Calendar	<p>Grants access to view Events Calendar page. This is an end user permission.</p> <p><i>With the Aug '17 Release, this permission also allows users to access the Events page using the Event Calendar button on the Learning Search page.</i></p>	Learning

Master List of New Report Fields - August '17 Release

This page provides the master list of new report fields for the August '17 release.

[Learning](#)

FIELD NAME	SECTION	CUSTOM REPORT NAME
Certification Active	Certification	Certification Report
Certification Contact (Email)	Certification	Certification Report
Certification Language	Certification	Certification Report
Certification Modified Date	Certification	Certification Report
Certification Owner (User ID)	Certification	Certification Report
Certification Prerequisite - Certification Title	Certification	Certification Report
Certification Prerequisite - Training Object ID	Certification	Certification Report
Equivalent Training Object ID	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Equivalent Training Version	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Language Equivalent Training Object ID	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Language Equivalent Training Version	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Training Roster Commented By (Name)	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report

FIELD NAME	SECTION	CUSTOM REPORT NAME
Training Roster Commented By (User ID)	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Training Roster Commented Date	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Training Roster Comments	Training	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Training Roster Commented By (Name)	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Training Roster Commented By (User ID)	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Training Roster Commented Date	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Training Roster Comments	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Training Modified By (Name)	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Training Modified By (User ID)	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Training Modified Date	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Training Modified Comments	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
User Attended Part?	Transcript	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report

[Onboarding](#)

FIELD NAME	SECTION	CUSTOM REPORT NAME
Onboarding User Future [OU Name]	Onboarding	Onboarding Custom Report
Onboarding User Future [OU Name] OU ID	Onboarding	Onboarding Custom Report
Onboarding User Future [Employee Relationship Name]	Onboarding	Onboarding Custom Report
Onboarding User Future [Employee Relationship Name] Email	Onboarding	Onboarding Custom Report
Onboarding User Future [Employee Relationship Name] ID	Onboarding	Onboarding Custom Report
Onboarding User Preboarding [OU Name]	Onboarding	Onboarding Custom Report Multi-Module Custom Reports
Onboarding User Preboarding [OU Name] OU ID	Onboarding	Onboarding Custom Report Multi-Module Custom Reports

[Performance](#)

FIELD NAME	SECTION	CUSTOM REPORT NAME
Goal Creation Date	Goals	Goals Custom Report Multi-Module Custom Report
Target Stretch	Goals	Goals Custom Report
Target Threshold	Goals	Goals Custom Report

[Recruiting](#)

FIELD NAME	SECTION	CUSTOM REPORT NAME
Application Progress	Applicant	Recruiting Custom Report Multi-Module Custom Report
Posting - Expiration Date	Requisition	Recruiting Custom

FIELD NAME	SECTION	CUSTOM REPORT NAME
		Report Multi-Module Custom Report
Scheduled Interview - Interviewer Comments	Interview Management and Scheduling	Recruiting Custom Report
Scheduled Interview - Interview Guide Name	Interview Management and Scheduling	Recruiting Custom Report
Scheduled Interview - Interview Guide Calculated Score	Interview Management and Scheduling	Recruiting Custom Report
Scheduled Interview - Interview Guide Target Score to Advance	Interview Management and Scheduling	Recruiting Custom Report
Scheduled Interview - Does Interview Guide Require Ratings?	Interview Management and Scheduling	Recruiting Custom Report
Talent Pool Date Created	Talent Pools	Recruiting Custom Report
Talent Pool Name	Talent Pools	Recruiting Custom Report
Talent Pool Owner	Talent Pools	Recruiting Custom Report

Release Notes Updates

Changes have been made on 25 August 2017, to the release notes for the August '17 release:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learning Experience Platform (LEP) - Learner Home	Learner Home Preferences	Updated topic to include that preferences can be set by an organizational unit (OU) type other than division through Global Product Support.

Changes have been made on 4 August 2017, to the release notes for the August '17 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Data Load Wizard - Display Threshold	Data Load Wizard - Display Threshold	This new enhancement was added to the August 2017 release.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Roster Completion Date Modification Audit Trail	Roster Completion Date Modification Audit Trail - Overview	This new enhancement was added to the August 2017 release.
Learning Experience Platform (LEP) - Learning Search	Learning Search Page	Updated topic to remove references to search filters displaying the number of available search results. This functionality is NOT available for the August 2017 release.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Performance Review Distribution Report - Z-Score Calibration	Performance Review Distribution Report - Z-Score Calibration	Added a consideration to clarify when z-score values are updated in Stage, Production, and Pilot portals.
Universal Profile: Snapshot Widgets Responsive UI Design	Universal Profile: Snapshot Widgets Responsive UI Design Snapshot: Competencies Snapshot: Development Plans Snapshot: Reviews	Previously, the release notes indicated that these values appeared color coded based on the score or rating. Updated the release notes to indicate that performance scores and ratings appear as black text. Also, updated images to show the ratings and scores as black text.
Universal Profile: Snapshot Widgets Responsive UI Design	Snapshot: Development Plans	Removed text that indicated that the CREATE NEW PLAN button was available to administrators. This button is only available when a user is viewing their own Snapshot: Development Plans page.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Active Fields by Requisition Template	Requisition Templates	Added note to indicate that the EEO Category field will always be visible on the requisition template, but the field's visibility on the requisition depends on which OU is selected when creating the requisition.
Data Load Wizard - Job Requisition Template	Data Load Wizard - Job Requisition Template	This new enhancement was added to the August 2017 release.
FADV Background Check Integration Enhancements	Question Bank - Reference Questions	Updated the format for how applicants must enter their telephone number in the Telephone field.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Updates to Equal Employment Opportunity Preferences	Updates to Equal Employment Opportunity Preferences	Added note to indicate that the EEO Category field will always be visible on the requisition template, but the field's visibility on the requisition depends on which OU is selected when creating the requisition.

Changes have been made on 24 July 2017, to the release notes for the August '17 release:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Create Child Sessions Permission	Create Child Sessions Permission	Updated the Considerations to clarify the visibility of this permission during UAT and upon release.

Changes have been made on 21 July 2017, to the release notes for the August '17 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Universal Profile Navigation Tabs Redesign	Universal Profile Navigation Tabs Redesign	Added a consideration regarding the way this enhancement may impact organizations that are using a custom footer.

Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Configurable Field Validations	Configurable Field Validations Custom Field -	Noted that if a user record custom field with field validations is included in the self-registration process, the format example is not displayed.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Configure Field Validations	

Edge

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Cornerstone REST API Enhancements	Cornerstone REST API Enhancements	Updated the Format Type Header Enhancements information to clarify the behavior of this enhancement and future changes to this functionality.
Format Parameter Deprecation in October '17 Release	Format Parameter Deprecation in October '17 Release	This is a new enhancement.

Engage

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Engage Filter and Reporting Enhancements	Employee Tenure Filter	Updated image to show text box filter options

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Create Child Sessions Permission	Create Child Sessions Permission	<ul style="list-style-type: none"> ○ Updated the permission description to be more descriptive ○ Added a Considerations section to identify key considerations for the permission ○ Updated topic to describe new related security object
Custom Reporting - Learning Fields	Learning Fields	Changed the text of all "modified by" fields to "edited by." Also removed four duplicate fields from the Transcript section.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learning Experience Platform (LEP) - Learner Home	Learner Home - Overview	Added a Machine Learning section to explain how often Machine Learning recommendations are updated in Stage, Pilot, and Production portals.
Learning Experience Platform (LEP) - Learner Home	Default Training Image Preferences	Updated topic with new recommended image aspect ratio and size
Learning Experience Platform (LEP) - Learner Home	Learner Home Image Specifications Impact	Updated topic with new recommended image aspect ratio and size
Learning Experience Platform (LEP) - Learner Home	Learner Home Welcome Message and Search Box	Updated the description of the search functionality to be more descriptive.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
End User Performance Pages UI Redesigns (Previously "Scheduled Tasks & Launch Off Cycle Review UI Redesigns")	End User Performance Pages UI Redesigns (Previously "Scheduled Tasks & Launch Off Cycle Review UI Redesigns")	Renamed this topic and enhancement from Scheduled Tasks & Launch Off Cycle Review UI Redesigns to End User Performance Pages UI Redesigns. Added the redesign of the Performance Review Summary page to the enhancement.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
FADV Background Check Integration Enhancements Overview	Map Education Fields for FADV	Changed the spelling of "postgraduate" in the Drop-Down Options to Add column for the School Type field. The new spelling is "postGraduate." Added a prerequisite note that resume data

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		must exist in the system prior to submitting a background check request.
FADV Background Check Integration Enhancements Overview	Question Bank - Reference Questions	<p>Added a note about the First Advantage (FADV) Telephone field to indicate that the phone number must be in the following format in order for FADV to load the data: (###)###-####].</p> <p>Added a prerequisite note that reference data must exist in the system prior to submitting a background check request.</p>

Succession

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Universal Profile: Succession Snapshot Responsive UI Redesign	Universal Profile: Succession Snapshot Responsive UI Redesign Snapshot: Succession	<p>Added the following additional enhancement to the topics: Custom fields (ratings) that are displayed in the following sections of the Succession Snapshot now respect the availability that is set for the field in Custom Field Administration:</p> <ul style="list-style-type: none"> ○ Ratings ○ Succession Information ○ Potential Successor for Incumbents and Positions

08 September Patch Release Functionality

What's New for the 08 September 2017 Patch Release

The following is released along with the 08 September 2017 patch release:

MODULE	FEATURE	DESCRIPTION
Mobile	SSO Authentication within Mobile Application	With this enhancement, administrators can configure the mobile application so that SSO authentication occurs within the mobile browser, as previously implemented, or to have the SSO authentication occur within the mobile application. This configuration is done within Mobile Preferences.
Planning	Cost Model Manager	With this enhancement, a Cost Model page is added to Work Force Planning. The Cost Model page enables you to upload Cost Model and Exchange Rate files. You can also view existing uploads.
Planning	Customizable Emails	With this enhancement, a Planning category is added to Email Management to enable administrators to configure notifications for planning events.
Recruiting/Edge	FADV Work Opportunity Tax Credit Integration	The First Advantage (FADV) Work Opportunity Tax Credit (WOTC) integration provides an additional integration option for assigning WOTC surveys. This integration enables organizations to identify applicants that may qualify for WOTC program tax credits by assigning FADV's WOTC surveys from within the Applicant Tracking System (ATS).

Mobile

SSO Authentication within Mobile Application

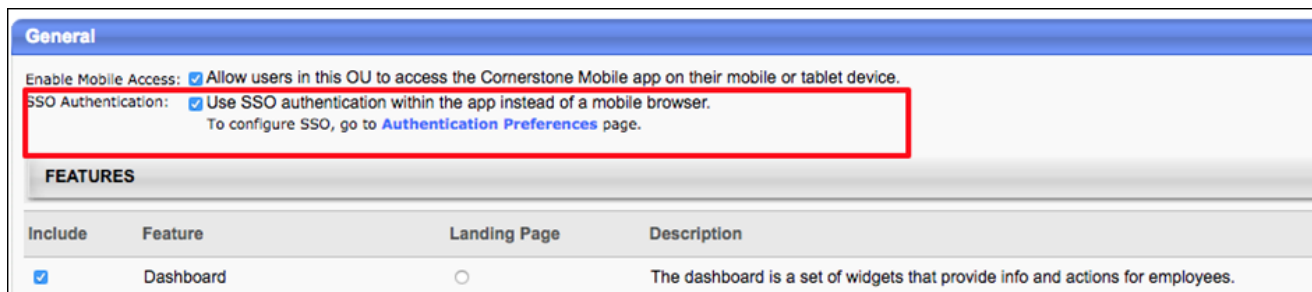
Prior to this enhancement, when a user chooses to log in to the mobile application via Single Sign On (SSO), the mobile application opens a tab on the mobile browser to authenticate the user.

With this enhancement, administrators can configure the mobile application so that SSO authentication occurs within the mobile browser, as previously implemented, or to have the SSO authentication occur within the mobile application. This configuration is done within Mobile Preferences.

Mobile Preferences

A new **SSO Authentication** option is now available in the *General* section of Mobile Preferences. *See Mobile Preferences.*

When this option is selected, when a user attempts to log in to the mobile application via SSO, the authentication occurs within the mobile application rather than a mobile browser. When this option is not selected, the authentication occurs in a mobile browser. By default, this option is not selected.



Implementation

This functionality is automatically available for all organizations who have Mobile Preferences enabled.

The SSO authentication method is unchanged by default.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Mobile Preferences	Grants ability to manage Mobile Preferences. This permission cannot be constrained.	Mobile

Planning

Cost Model Manager

With this enhancement, a Cost Model page is added to Work Force Planning. The Cost Model page enables you to upload Cost Model and Exchange Rate files. You can also view existing uploads.

This functionality is controlled by a backend setting that is disabled by default. To enable this functionality, contact Global Product Support. For more information about this functionality, contact your Client Success Manager.

To access the Cost Model page, go to **ADMIN > COST MODEL MANAGER**. **Note:** *The Cost Model sublink will be added automatically to the Admin tab once the Cost Model Manager functionality is enabled in the portal, and provided that the user has the permission for Cost Model Manager.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Work Force Planning - Cost Model Manager	Allows user to upload and manage costing files and exchange rates for Planning.	Core Administration

Cost Model		
EXCHANGE RATES		
Base Currency	Local Currency	Rate
USD	CLP	0.00151
USD	IDR	0.00007
USD	ZAR	0.07429
USD	BDT	0.01212
USD	BOB	0.143
USD	BWP	0.09497
USD	XAF	0.00162
USD	CDF	0.00074
USD	CZK	0.04007
USD	DKK	0.14391
USD	GHS	0.22137
USD	GNF	0.0001
USD	GYD	0.00482
USD	HKD	0.1288
USD	ISK	0.00898
USD	KZT	0.00309
USD	KES	0.00951

General Information

There can be multiple versions of cost uploads at any time, but new plans are always created from the most recently uploaded version. The most recently uploaded version replaces the existing file and applies to all plans created from that point thereafter (until another file upload replaces it).

Previously created plans are not automatically affected by uploaded cost files. To update cost for previous plans with a new cost file, go to the Planning homepage, then click the **Actions** drop-down for the specific plan and select **Update Costs**.

Both the Cost Model file and the foreign exchange rate file are required to create a plan, even if you do not want costs applied. By default, a cost model with blank values will be applied to all new plans until new cost files are uploaded.

For uploading a Cost Model and applying it to plans, the following is the recommended order:

New Plans

1. Upload foreign exchange rate file.
2. Upload Cost Model file.

3. Convert Users.
4. Create Plan.

Existing Plans

1. Upload an updated Cost Model or foreign exchange rate file, changing only the component values not the components or OUs.
2. Go to the existing plan on the homepage.
3. Click the **Actions** drop-down on the plan card and select **Update Costs**.

Upload Exchange Rates

Click the **UPLOAD EXCHANGE RATES** button to upload an exchange rate file.

Important Note: *The foreign exchange rate file must be loaded before the Cost Model file.*

- The file must be comma-delimited.
- The file's first row must contain the following two columns (case sensitive, in this order):
 - Currency
 - Exchange Rate
- The first row **must** be the base currency for the exchange rates. The base currency will be displayed by default and in cases where positions displayed are costed in different local currencies. All other currencies (if used) are converted to the base currency.
- The first row's exchange rate must be 1.
- Even if you do not use multiple currencies, you must still upload this file. If you only want one currency, then define your currency as you want it displayed and put the value as 1.
 - Example: USD=1.
- If you use multiple currencies, you will provide additional rows defining those currencies as converted to the base currency at the top row.
- The file load does not require ISO currencies; there is no validation for this.
- If duplicate currencies are loaded, it will be noted as a validation error.

	A	B	C
1	Currency	Exchange Rate	
2	USD	1	
3	EUR	1.1	
4	CAD	0.75	
5	AUD	0.76	
6	UAH	0.039	
7	ARS	0.059	
8	BRL	0.31	
9	CNY	0.15	
10	COP	0.00033	
11	GBP	1.29	
12	ILS	0.28	
13	INR	0.016	
14	JPY	0.0088	

Upload Cost Model

Click the **UPLOAD COST MODEL** button to upload a cost model file.

Important Note: *The foreign exchange rate file must be loaded before the Cost Model file.*

- The file must be comma-delimited.
- The file's first row must contain the following columns (case sensitive, in this order):
 - (Name of Attribute)
 - Currency
 - Year
 - (Cost Items)
- This file determines the costs assigned to each position(seat) in Planning.
 - Choose one organizational unit (OU) type as the basis for costing, and then define which OU values from that OU type have different costs. These appear as rows. For example, if you use Location OU type, you can decide the different costs of positions based on your associated Location OUs, showing each location on a different row.
 - It is required to have one row that has OU value blank for each year. This acts as a catchall for any position (seat) that is associated with an OU not explicitly defined in the Cost Model file.
 - The Cost Item Ref column (e.g., Location OU) must reference ou_id from dbo.ou table
 - There is no validation for duplicate rows, but duplicate rows do not break costing.
 - Provide cost components for the cost, such as base salary, bonus, and taxes paid by the employer. These components appear as columns with headers that you define.
 - There is no limit to the number of cost components.

- In the main Planning interface, these components will be displayed in aggregate as a Total Cost.
- Provide currency per OU. The currency appears as a column.
- Provide different costs per year. The year appears as a column.
 - If a plan is subsequently created for years not defined in the Cost Model file, the closest defined year will apply. For plans with years preceding, the application will take the earliest year available. For plans with years following, it will take latest year available.

	A	B	C	D	E	F
1	Location	Currency	Year	Salary		
2	1144	ARS	2015	100		
3	1112	AUD	2015	200		
4	1140	AUD	2015	200		
5	1141	AUD	2015	200		
6	1143	BRL	2015	100		
7	1209	BRL	2015	100		
8	1115	CAD	2015	300		
9	1156	CAD	2015	300		
10	1162	CAD	2015	300		
11	1184	CAD	2015	300		
12	1191	CAD	2015	300		
13	1109	CNY	2015	200		
14	1137	CNY	2015	200		
15	1145	COP	2015	100		
16	1090	EUR	2015	400		
17	1122	EUR	2015	400		
18	1123	EUR	2015	400		
19	1091	EUR	2015	400		
20	1124	EUR	2015	400		
21	1125	EUR	2015	400		
22	1092	EUR	2015	400		
23	1093	EUR	2015	400		

Customizable Emails

With this enhancement, a Planning category is added to Email Management to enable administrators to configure notifications for planning events.

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

Emails

The following new emails are available in the Planning category:

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
WFP Not Implemented System Event Email	This email is triggered if an event occurring in Planning does not have an associated email action available. This email is a Notification type email.	Planning
WFP Plan CoPlanners Changed	This email is triggered when the Co-Planners for a given plan are changed, whether that is adding or removing Co-Planners. The email is sent to User assigned as Primary Planner and Users assigned as CoPlanners (new). The tags in this email reference the given plan, which is the recipient's plan. This email is a Notification type email.	Planning
WFP Plan Created	This email is triggered to notify the user that the plan was created successfully. The email can be sent to User who created plan	Planning

	(owner). This email is configured as a Notification type email.	
WFP Plan Due Date Changed	<p>This email is triggered when the Due date for a given plan is changed. The tags in this email reference the given plan, which is the recipient's plan.</p> <p>The email is sent to User assigned as Primary Planner and Users assigned as CoPlanners. This email can be configured as a Notification type email.</p>	Planning
WFP Plan Primary Planner Changed	<p>This email is triggered when the Primary Planner for a given plan is changed. The tags in this email reference the given plan, which is the recipient's plan.</p> <p>The email is sent to User assigned as Primary Planner (new) and Users assigned as CoPlanners. This email can be configured as a Notification type email.</p>	Planning
WFP Subplan Accepted	<p>This email is triggered when the Subplan is accepted by the parent planner. The tags in the email refer to the subplan, not the parent plan.</p> <p>The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email.</p>	Planning
WFP Subplan Assigned To CoPlanner	<p>This email is triggered when the Subplan is accepted by the parent planner. The tags in the email refer to the subplan, not the parent plan.</p> <p>The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email.</p>	Planning
WFP Subplan Assigned To Primary Planner	<p>This email is triggered a specific user when s/he is assigned as Primary Planner.</p> <p>The email is sent to User assigned as Primary Planner in this event. This email can be configured as a Notification type email.</p>	Planning
WFP Subplan Rejected	<p>This email is triggered when a subplan is rejected by Parent Planner. The tags in the email refer to the subplan, not the parent</p>	Planning

	<p>plan.</p> <p>The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email.</p>	
WFP Subplan Submitted	<p>This emails is triggered as confirmation that a subplan was submitted for review. The tags in the email refer to the subplan, not the parent plan.</p> <p>The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email.</p>	Planning
WFP Subplan Submitted To Primary Planner	<p>This emails is triggered as notification that a subplan was submitted and needs review. The tags in the email refer to the subplan, not the parent plan.</p> <p>The email is sent to User assigned as parent plan's primary planner. This email can be configured as a Notification type email.</p>	Planning

Email Tags

Notes:

- *When the email is sent to a planner of a "parent" plan as it relates to one of its subplans, the email tags refer to the subplan and not the parent plan.*
- *The **BCC notifications to field** is not currently supported.*
- *Users who are added to the **Send To** and **Cc** fields will not receive emails if they are not Work Force Planning users (i.e., Plan Owner, Primary Planner, Sub-Planner).*

The following email tags are available:

TAG NAME	DESCRIPTION	TAG AVAILABILITY
WFP.AREA.TAG	WFP Area	All email triggers
WFP.COPLANNERS.TAG	WFP Co-Planners	Only the Plan CoPlanners Changed trigger
WFP.DUE.DATE.TAG	WFP Due Date	All email triggers except: Subplan Submitted, Subplan To Primary Planner, Subplan Rejected, and Subplan Accepted
WFP.PLAN.NAME.TAG	WFP Plan Name	All email triggers except Subplan Rejected and Subplan Accepted

TAG NAME	DESCRIPTION	TAG AVAILABILITY
WFP.PLANNER.NAME.TAG	WFP Planner Name	Only two triggers: Subplan Submitted and Subplan Accepted
WFP.PRIMARY.PLANNER.TAG	WFP Primary Planner	Only the Primary Planner Changed trigger
WFP.RECIPIENT.NAME.TAG	WFP Recipient Name	All email triggers

Recruiting/Edge

FADV Work Opportunity Tax Credit Integration

First Advantage (FADV) Work Opportunity Tax Credit (WOTC) Integration - Overview

The First Advantage (FADV) Work Opportunity Tax Credit (WOTC) integration provides an additional integration option for assigning WOTC surveys. This integration enables organizations to identify applicants that may qualify for WOTC program tax credits by assigning FADV's WOTC surveys from within the Applicant Tracking System (ATS).

Use Cases

Use Case 1: Activate the FADV WOTC integration through Edge

- James is Acme Company's administrator and has been tasked with enabling the WOTC integration between Cornerstone and FADV. This will allow Acme to include the WOTC survey in their application process and enable FADV to manage the submission process.
- James goes to the Edge Marketplace to purchase and activate the FADV WOTC integration.
- From the Edge Integrate page, James enters Acme's Company ID, which is provided by their FADV project team.
- Acme's Cornerstone portal now has an active WOTC integration between Cornerstone and FADV.

Use Case 2: Recruiting Administrator configures FADV WOTC survey as an action step in Application Workflow

- Allan is the Recruiting administrator for Acme.
- With the integration enabled, Allan is tasked with including a WOTC survey in all of Acme's Customer Support requisitions.
- Allan creates a new custom application workflow template that includes a WOTC action step, ensuring that FADV WOTC is added as a custom integration.
- Allan configures all Customer Support requisitions to include the custom application workflow template, which includes a WOTC action step.
- Applicants applying to the Customer Support requisition are now prompted to complete a FADV WOTC survey as part of their application process.

Use Case 3: Recruiter assigns an ad hoc assessment to an applicant

- Lisa, a hiring manager at Acme, is looking to add two new members to her Customer Support team.
- To help reduce the company's income tax liability, Lisa would like to consider hiring a WOTC eligible candidate.
- Lisa goes to the Manage Applicants page for the Customer Support requisition and identifies four potential candidates to assign a WOTC survey to, making sure that all candidates' statuses are assigned to the custom status FADV WOTC.
- While the same candidates are selected, Maria selects the **Assign Integration Assessment** option from the **Actions** drop-down. She proceeds with the assignment and clicks **SUBMIT**.

- The applicants will receive an email with a link that will redirect them to complete the FADV WOTC survey. **Note:** *The Assign Integration Assessment email trigger email will need to be successfully configured by the administrator in Email Administration in order for the applicant to receive the email.*
- After the applicants complete the survey, FADV sends Cornerstone a summary of the candidate's results, which are available for viewing on the Manage Applicants page or the Application tab on the Applicant Profile page.
- To further review the assessment results, Lisa clicks the **View Report** link, which will direct her to FADV to view a detailed report of the assessment results.

Implementation

This functionality is only available for organizations using Recruiting and must be purchased and activated via the Edge Integration Marketplace.

Considerations

- **Mobile App** - This functionality is not available in the mobile app. If the survey is included in a step of the application workflow, the step will be skipped in the mobile app.
- **Retroactive Application** - WOTC surveys cannot be retroactively applied to requisitions prior to enabling of the integration, even though these requisitions are in open/active status.
- With this integration, FADV will collect the candidate's Social Security Number at the time the candidate is completing the WOTC survey.

Best Practices for Using WOTC Surveys

- **Where to Place in Application Workflow** - Display WOTC between an Education Experience section and a section such as EEO Questions.
- **Make It a Required Step** - WOTC step should be configured to be a required step.
 - When a candidate reaches the WOTC survey step, the candidate is required to click the **LAUNCH** button to start the survey before moving to the next step.
 - When the candidate is directed to FADV, the candidate has an opportunity to opt out of the survey.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration
Applicants: Assign Assessment	Grants access to manage assessment integrations from the Applicant Profile page. This applies to assessments that have been configured in the integration center. This permission	Recruiting

<p>Integration</p>	<p>cannot be constrained. This permission is only available for portals that have an active assessments integration.</p> <p>This is the highest level of permission for this functionality. In addition to being able to assign assessments, users with this permission will be able to view the assessment status and assessment details.</p>	
<p>Applicants: View Assessment Integration Status</p>	<p>Allows user to view the assessment integration check status on the Applications tab of the Applicant Profile page. The user cannot view the link to the detailed report of the assessment. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration.</p> <p>This is the lowest level of permission for this functionality. Users with this permission can only view the assessment status; they cannot assign assessments or view assessment details.</p>	<p>Recruiting</p>
<p>Applicants: View Assessment Integration Status and Details Link</p>	<p>Allows user to view the assessment integration status and view link to access the assessment report from the Applications tab of the Applicant Profile page and from the associated column on the Manage Applicants page. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration.</p> <p>This is the second highest level of permission for this functionality. Users with this permission will be able to view the assessment status and assessment details but will not be able to assign assessments.</p>	<p>Recruiting</p>
<p>Application Workflow Template - Manage</p>	<p>Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.</p>	<p>Recruiting Administration</p>
<p>Application Workflow Template - View</p>	<p>Grants ability to access and view Application Workflow Templates.</p>	<p>Recruiting Administration</p>
<p>Global Email Administration - Manage</p>	<p>Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various</p>	<p>Core Administration</p>

	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
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.</i></p>	Recruiting

This permission cannot be manually assigned.

Note: *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the **Requisition: Reviewer** permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the **Requisition: Reviewer** permission. See [Applicant Profile Page Overview](#) for more information about duplicate reviewer instances.*

FADV WOTC Integration Implementation Steps

To enable the FADV WOTC integration, the client administrator must perform the actions listed below. The activation of the integration is a one-time activity per environment (Stage, Pilot, Production).

1. Select and purchase the FADV WOTC integration via Edge Marketplace
 - Navigation: Admin > Tools > Edge > Marketplace
2. Activate the FADV WOTC integration on Edge Integrate
 - Navigation: Admin > Tools > Edge > Integrate
3. Configure the integration on the Edge Settings page
 - Company ID - This ID is used by FADV to authorize assessment request submissions from Cornerstone. The ID is provided by the client's FADV project team.

Additional Information

- You must have an existing contract with FADV.
- You must work with your FADV project team to purchase and configure WOTC.
- No migration is required.
- The integration comes with Recruiting.
- The integration cannot be purchased independently of a product line.
- There is no added cost to use the FADV WOTC integration.

Assign FADV WOTC Survey

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Assign Integration Assessment	<p>This email is triggered when an Edge integration assessment is assigned to an applicant, such as a WOTC assessment. This email can be configured as a notification or a reminder, and it can be sent to External Applicant, Internal Applicant, OU Approver, Hiring Manager, OU Approver, or a specific user.</p> <p>Note: <i>The <code>APPLICANT.INTEGRATION.ASSESSMENT.LINK</code> tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.</i></p>	Recruiting

Ad Hoc Assignment

This set up is required when assigning to an applicant outside of an application workflow (i.e., ad hoc assignment).


Note: *The Assign Integration Assessment email trigger email will need to be successfully configured in order for the applicant to receive an email.*

1. Navigate to the Manage Applicant Status page:
 - Navigation: ADMIN > TOOLS > RECRUIT > APPLICANT STATUSES > SELECT THE TOP LEVEL OU
2. Click the **Create Custom Status** link. This opens the Create Custom Status pop-up.
3. Complete the following fields in the pop-up:
 - **Language** - If multiple languages are enabled for the portal, select the language from the drop-down list for which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop-down list and enter the localized name and description in the appropriate fields.
 - **Display Name** - Enter the status name, which appears throughout the system. The character limit for this field is 50. When the display name of an active status is modified after the status is in use or has been used in a job requisition:
 - The new display name appears on the Default Status List page.
 - The new display name appears in the Status list on the job requisition template.
 - Any new job requisitions created after the display name is changed apply the new display name.
 - Job requisitions created before the status display name is changed continue to honor the name that existed at the time the requisition was created.
 - **Description** - Enter the status description. This should describe the purpose of the status and what is implied when an applicant is in that status. The character limit for this field is 500.

- **Type** - Select **Custom Integration** from the drop-down. **Note:** *This field is displayed only when creating a custom status at the top level OU. When creating a custom status for a child OU, the **Type** field displays the type selected for the parent OU but is not editable.*
 - **Integration** - Select "First Advantage WOTC" from the drop-down.
 - **Active** - This field is checked by default. Ensure the field is checked before saving the status so that the status is active for the portal.
4. Click **SAVE** to save the custom applicant status.
 5. Create a new job requisition to include the new custom applicant status.

Assign in Application Workflow

This set up is required when assigning as a step within a job requisition's application workflow.

1. Navigate to the Application Workflow Templates page.
 - Navigation: ADMIN > TOOLS > RECRUIT > APPLICANT WORKFLOW TEMPLATES
2. Click the **Create Template** link. This action directs the administrator to the Create Template page.
3. Complete the fields on the Create Template page.
 - **Name** - Enter a descriptive name for the application workflow template. If multiple languages are enabled, select the language from the drop down list for which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop down list and enter the localized name and description in the appropriate fields.
 - **Description** - Enter a description for the application workflow template. This should describe the purpose of the workflow. The character limit for this field is 100.
 - **Add a Section** - Click on the Add Section icon . This opens the Add Section pop-up.
 - **Title** - Enter a descriptive value in the field, which has a character limit of 50.
 - Click on the **SAVE** button.
 - **Add Action Item** - Select **Custom Integration** from the **Add Action Item** drop-down. This opens the Edit Action Item pop-up. Complete the following fields in the pop-up:
 - **Title** - Enter a descriptive value in the **Title** field which is a required field. This character for this field is 50
 - **Instructions** - Enter instructions for the action item. This field is optional. It accepts HTML and does not have a character limit.
 - **Integration** - Select **First Advantage WOTC**.
 - **Completion Required** - Select this option to require applicants to complete the integration step before moving to the next step in the application workflow.
 - Click **SAVE** to save the action item.
4. Click **SAVE** to save the application workflow template.
5. Create a new job requisition to include the custom application workflow.

Applicant Experience - FADV WOTC Survey

When an FADV WOTC survey is included in the application workflow, applicants can complete the survey when filling out the application. The survey appears as a step in the workflow. The name of the step is dependent upon how the step is named when configuring the application workflow template associated with the requisition.

The applicant clicks **LAUNCH** on the application workflow step or from the email that was sent when the survey was assigned via the Manage Applicants page. This will register the applicant with FADV and open the WOTC survey that is associated with the job requisition.

The survey opens in a new tab or browser. Upon the candidate completing the survey, FADV processes the results and sends an update to Cornerstone.

When a candidate is hired, Cornerstone sends an update to FADV to initiate the client's tax credit paperwork (i.e., when the hired candidate completes the required hours). The results will display "Hire status submitted to First Advantage."

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Assign Integration Assessment	<p>This email is triggered when an Edge integration assessment is assigned to an applicant, such as a WOTC assessment. This email can be configured as a notification or a reminder, and it can be sent to External Applicant, Internal Applicant, OU Approver, Hiring Manager, OU Approver, or a specific user.</p> <p>Note: <i>The <code>APPLICANT.INTEGRATION.ASSESSMENT.LINK</code> tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.</i></p>	Recruiting

View FADV WOTC Survey Results

A summary of the results are available in the following areas of the Applicant Tracking System (ATS):

- Manage Applicants page
- Applicant Profile > Application tab > FADV WOTC integration custom status panel

The results display the following information:

- Status
- Result
- Check Order Progress/View Report link - Click the link to check the progress of the survey processing or view the survey results once they have finished processing.

The results only appear for users with permission to assign and view assessment integrations and view the assessment integration status and details link. For users without these permissions, they can only view the date on which the survey was assigned and the integration order status (Acknowledged, Completed, etc.).

22 September Patch Release Functionality

What's New for the 22 September 2017 Patch Release

The following is released along with the 22 September 2017 patch release:

MODULE	FEATURE	DESCRIPTION
Cornerstone HR	Time and Attendance Integration - Kronos	With this release, basic user profile information is now synchronized from the Cornerstone HR system to Kronos user profiles. When a new user is added to the Cornerstone HR system, the user will automatically be added to the organization's Kronos system as well. In addition, when an existing user is updated in the Cornerstone HR system, the user's profile is updated in the organization's Kronos system.

Cornerstone HR

Time and Attendance Integration - Kronos

With the February 2017 release, the Kronos Time and Attendance integration was made available via the Edge Marketplace, and this integration enabled users to use Single Sign On (SSO) to log in to Kronos from the Cornerstone HR system.

With this release, basic user profile information is now synchronized from the Cornerstone HR system to Kronos user profiles. When a new user is added to the Cornerstone HR system, the user will automatically be added to the organization's Kronos system as well. In addition, when an existing user is updated in the Cornerstone HR system, the user's profile is updated in the organization's Kronos system.

This functionality is only available to organizations using Cornerstone HR.

Note: *This functionality will be released with the September 22 post-release patch.*

Error Handling

If the Kronos integration is enabled and an error occurs when the Cornerstone HR system submits a user record to the Kronos system for synchronization, then the Cornerstone HR system generates an email to the Kronos integration email address. This email contains the error messages that were indicated by Kronos. The email address to which these error emails are sent is the email address that is configured to receive messages in the event of sync failures.

Considerations

Cornerstone HR does not share any Sensitive Personally Identifiable Information (SPII) with Kronos.

Custom fields on the user record are not currently shared with Kronos.

The system begins syncing users after the integration is enabled. Any existing Cornerstone HR users must be added in bulk via the Kronos solution.

The integration does not sync from Kronos to Cornerstone HR, meaning that if a user is added or updated in Kronos, these users are not added or updated in Cornerstone HR.

Implementation

The Kronos integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This functionality is only available to organizations using Cornerstone HR. Organizations must also have a Kronos account.

Note: *This functionality will be released with the September 22 post-release patch.*

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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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
Universal Profile - User Record - Create Users	Grants ability to access the User Record Administration page and to create new users in the system. When creating a new user, this permission grants the ability to add general information, which includes first name, last name, username, assigned OUs, and custom relationships. The administrator must have additional permissions to add any additional fields. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Users - Edit General Information	Grants ability to edit the general fields on a user record, including first name, last name, username, assigned OUs, and custom relationships. This permission works in conjunction with the Users - View permission. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Benchmark

Benchmark - Overview

Prior to the development of Benchmark, organizations wishing to better understand their performance data compared to other similar organizations needed to manually calculate their metrics periodically and share them with a benchmarking service, which allowed them to compare their numbers with an aggregate of others who also submitted their numbers. Self-reporting can be inaccurate and inconsistent due to variations in the methodology each company uses to calculate their metrics, and it is cumbersome to calculate frequently. As a result, most organizations self-reported on their performance data only once or twice per year.

With the Benchmark platform, released in June 2017, organizations can compare and visualize their performance across key HR metrics with other organizations based on their industry, region, and size, using up-to-date, accurate and consistent data across all of Cornerstone's clients, and across Cornerstone's extensive talent management product lines. Benchmark allows you to discover how well your organization is performing by comparing parts of the organization against itself, or comparing the entire organization against peer organizations. By aggregating workforce, diversity, learning, and recruiting metrics across Cornerstone client portals, you can conduct analysis to help identify gaps in your organization's processes and establish a baseline of information. These data-driven human capital and workforce decisions can help you plan more effectively and strategically for the future in order to achieve a competitive advantage.

[Click here to access the Benchmark Starter Guide.](#)

Use Cases

Use Case 1:

An HR administrator wants to analyze which types of training drive the highest level of compliance and completion. They can use the Training Completion Rate and Training Compliance Rate metrics to understand what is driving the highest and lowest rates at their company and compare it to other segments to understand which rates are in line with their peers and what learning object (LO) types have opportunities for improvement.

For example, if a set of peer groups have much higher completion rates for video LOs than the company performing the analysis, the company can leverage that information to examine elements of their video content (e.g. distribution of content duration) to determine if there's an opportunity to suggest purchasing more content with shorter durations to help improve internal completion rates.

The organization can also compare internal data and find groups that are above average and incorporate their best practices company-wide. This may help inform decision when administering courses to certain divisions and locations, based on what types of training internal users are best at completing.

Use Case 2:

An HR manager implements a new recruiting strategy and wants to see if their median time to fill a requisition has improved over the course of this new program.

One way the manager could do this would be to test internally to see how well a certain division improved vs. another division, to gain a relative understanding of how much better a certain program may reduce time to fill than the other.

Another metric that could also help with this process is evaluating the organization's applicants per requisition. If a segment's applicants per requisition is increasing over time, and their time to fill is steadily decreasing, this could indicate that a program's objective to, for example, drive referral rates higher for a particular part of the organization, is positively impacting recruiting efforts.

Furthermore, the organization may compare their time to fill with their peers to understand if their performance is comparatively good or bad. This may help an organization determine if they need to focus on strategically enhancing their recruiting efforts.

Use Case 3:

An executive wants to use the Benchmark dashboard to understand how their company is performing, so they can make more informed organizational planning decisions.

With the Span of Control metric, the executive can get a relative understanding of how the current spans of different sales divisions within the organization compare against each other. This gives her a better idea of how to recalibrate the management teams within sales to increase efficiency. The executive can keep a broader eye on Span of Control and how the metric compares to peer organizations to get a relative understanding about if the company may or may not be running efficiently.

Use Case 4

An executive at a company with a large retail presence learns from a report that gender-diverse business units in retail have a 14% higher average comparable revenue than less diverse business units. The executive wants to obtain a relative understanding of the organization's gender mix compared to its peers. He realizes that they're below their peers.

After some analysis, he discovers that certain business units relative to their overall company have significant room for improvement. He urges talent to try and achieve gender equality at the organization by rolling out recruiting programs to bring equality to these groups.

He checks these internal segments on a quarterly basis to verify how much closer these metrics ultimately drive his initiative to bring equality to the company and increase average comparable revenue in their retail division.

Considerations

Benchmark compares data between Cornerstone clients. Data for organizations not using Cornerstone products is not currently available for use with Benchmark.

Implementation

The Benchmark module is available for purchase, and can be activated in Pilot, Stage, and Production portals upon enablement. Benchmark can be purchased independent of other product lines, though its value to an organization increases when an organization is using multiple other products, especially Learning and Recruiting. Please contact Global Product Support for more information and to enable Benchmark.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration

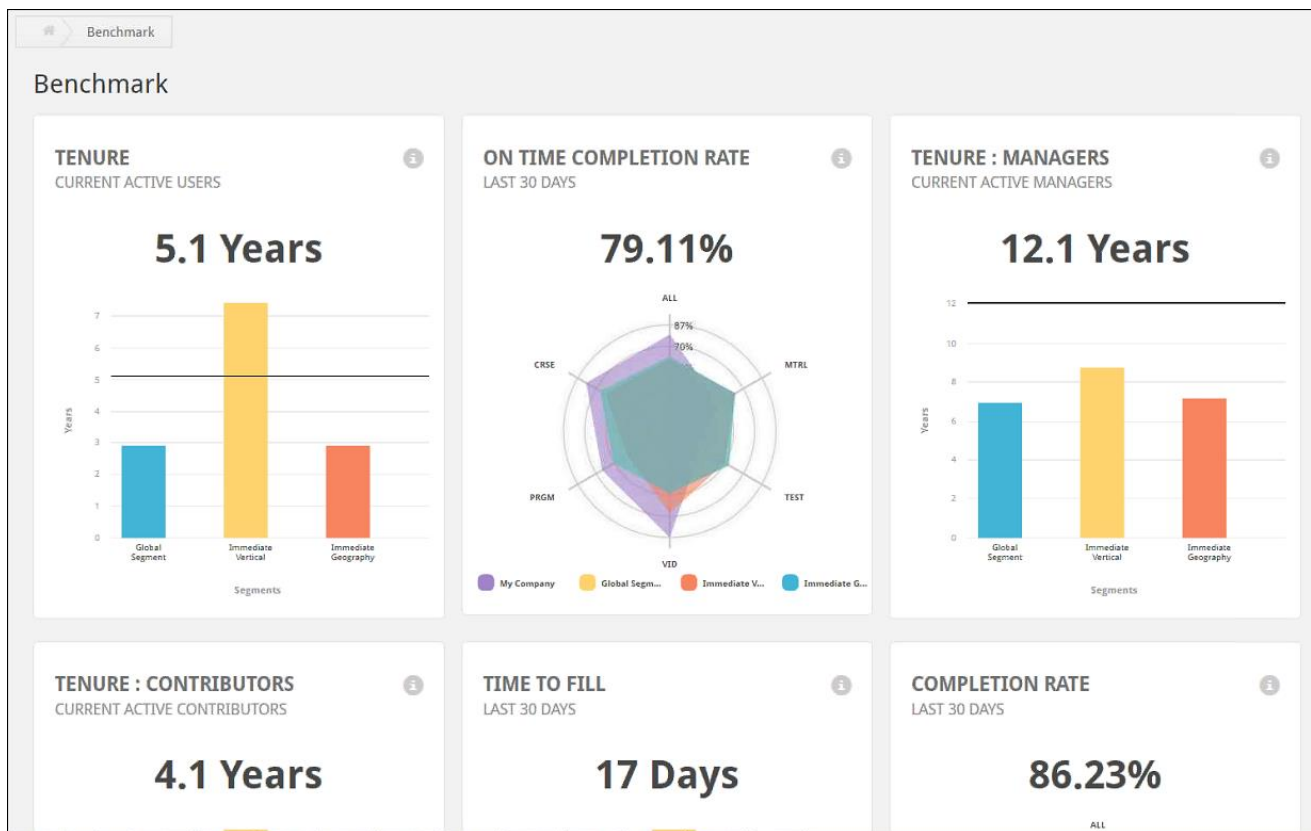
Benchmark Dashboard

The Benchmark dashboard provides administrators with a high-level overview of various types of internal workforce, learning, and recruiting data, along with how that internal data compares to industry averages. The Benchmark dashboard page displays several report widgets that feature visually dynamic charts and data averages. Clicking individual report widgets allows administrators to view specific types of data in greater detail.

To access the Benchmark dashboard page, go to **ADMIN > TOOLS > BENCHMARK**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Widgets

The following widgets are available on the Benchmark dashboard page:

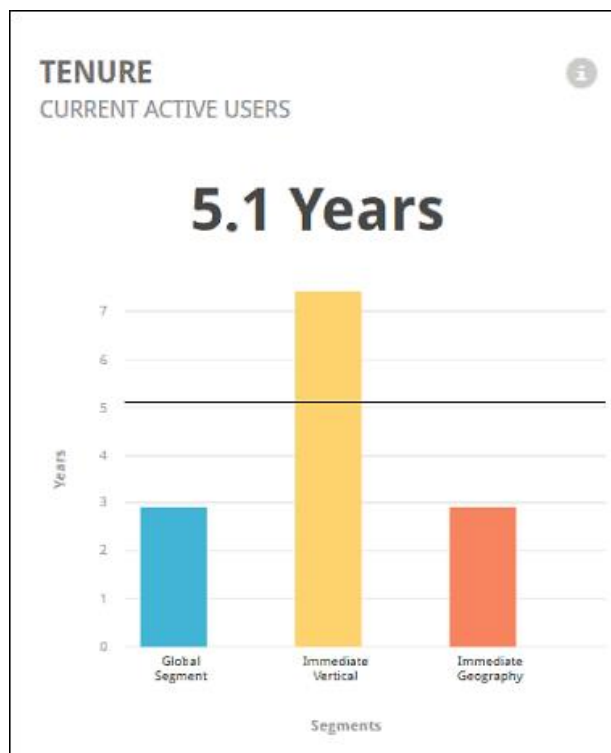
Tenure

The Tenure widget displays the amount of time employees remain at the organization and helps administrators determine whether retention efforts should be improved. If this metric is low, for example, the organization likely experiences a very high rate of turnover and could work to improve retention. If this metric is high, an organization might expect to soon experience a significant knowledge drain from a retiring employee population that has a very high tenure.

The following information is available in the Tenure widget:

- **Title** - This field displays the title of the widget.
- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Tenure chart displays the average time employees remain in their positions, across all selected segments. The bar graph displays individual tenure metrics for your organization vs. other selected segments.

Click the Tenure widget to view and configure segments for the report. [See Tenure - Segments](#) on page 119 *for additional information*.



On Time Completion Rate

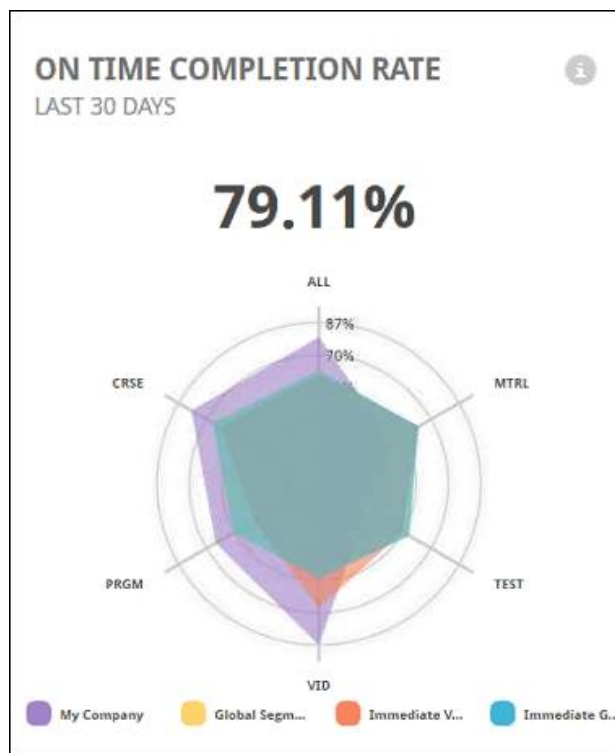
On Time Completion Rate helps you identify how well your organization completes training on time, compared to peer organizations. It identifies the types of training that have the highest on-time completion rates. This may help determine whether to keep or acquire

certain types of content to effectively drive mandatory training and compliance within your organization.

The following information is available in the On Time Completion Rate widget:

- **Title** - This field displays the title of the widget.
- **Timeframe** - This field indicates what span of time is being analyzed in the widget.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The On Time Completion Rate chart displays the average training completion across both your organization and peer organizations. The web graph compares completion rates for various training types for your organization as well as the segments selected.

Click the On Time Completion Rate widget to view and configure segments for the report. See [On Time Completion Rate - Segments](#) on page 114 for additional information.



Tenure: Managers

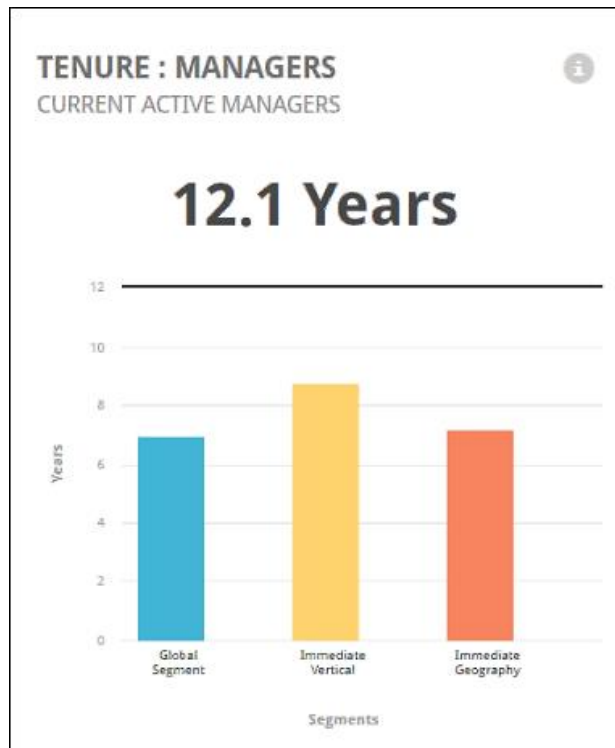
The Tenure: Managers widget displays the median number of years managers have been with the organization at the current point in time. This can help determine how long managers are staying at the organization and whether or not your organization needs to improve retention efforts. A manager is defined as any employee with at least one direct report in the system.

The following information is available in the Tenure: Managers widget:

- **Title** - This field displays the title of the widget.

- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Tenure: Managers chart displays the average time employees categorized as managers remain in their positions, across all selected segments. The bar graph displays individual tenure metrics for your organization vs. other selected segments.

Click the Tenure: Managers widget to view and configure segments for the report. [See Tenure: Managers - Segments](#) on page 125 for additional information.



Tenure: Contributors

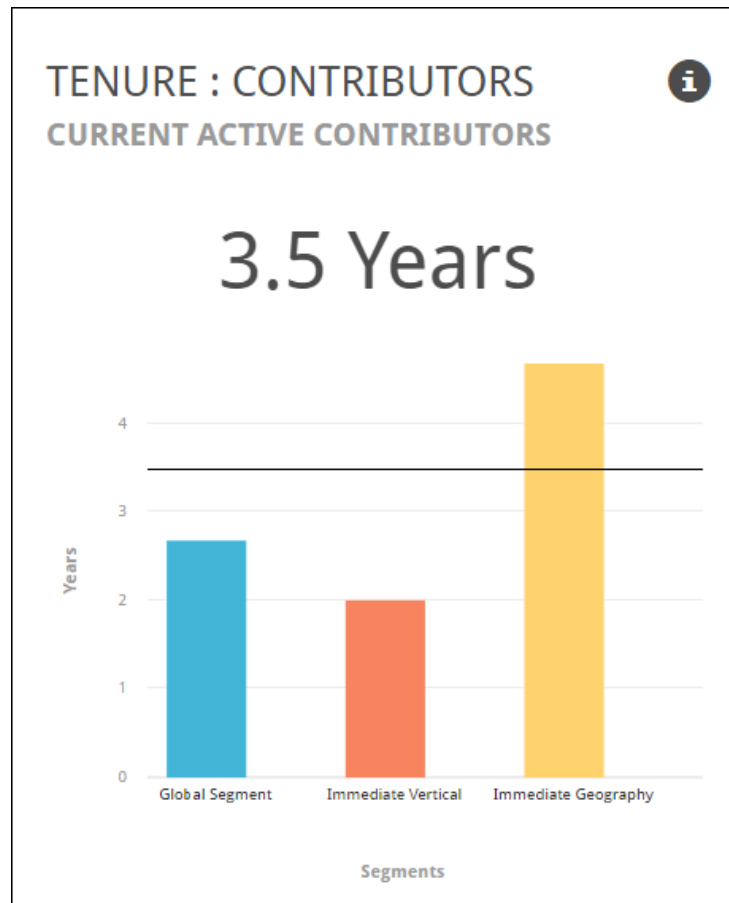
The Tenure: Contributors widget displays the median number of years that individual contributors have been with the organization at the current point in time. An individual contributor is considered to be any user without one or more direct reports. This can help you determine how long employees are staying at the organization and whether you need to improve retention efforts.

The following information is available in the Tenure: Contributors widget:

- **Title** - This field displays the title of the widget.
- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Tenure: Contributors chart displays the average time employees categorized as individual contributors remain in their positions, across all selected

segments. The bar graph displays individual tenure metrics for your organization vs. other selected segments.

Click the Tenure: Contributors widget to view and configure segments for the report. [See Tenure: Contributors - Segments](#) on page 122 for additional information.



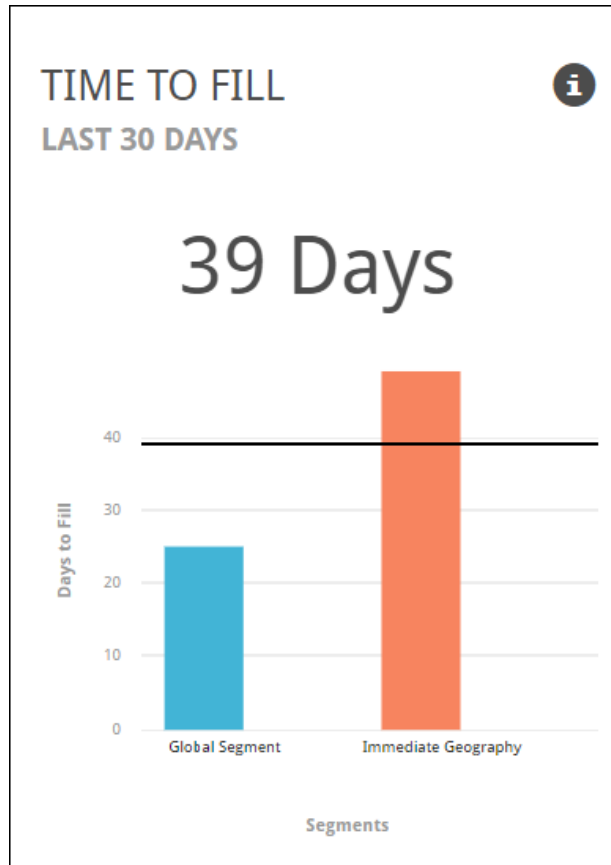
Time to Fill

The Time to Fill widget displays the number of days that a job requisition is open before being filled, during a selected time period. This metric helps identify whether your organization may be taking too long to fill requisitions, or indicate that the organization is hiring candidates too quickly. You can also track time to fill over time to understand whether the organization is trending toward reaching set goals.

The following information is available in the Time to Fill widget:

- **Title** - This field displays the title of the widget.
- **Timeframe** - This field indicates the span of time that is being analyzed.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Time to Fill chart displays the average number of days it takes to fill a position across all selected segments. The bar graphs provide a breakdown of how long it takes individual segments to fill a position.

Click the Time to Fill widget to view and configure segments for the report. [See Time to Fill - Segments](#) on page 128 for additional information.



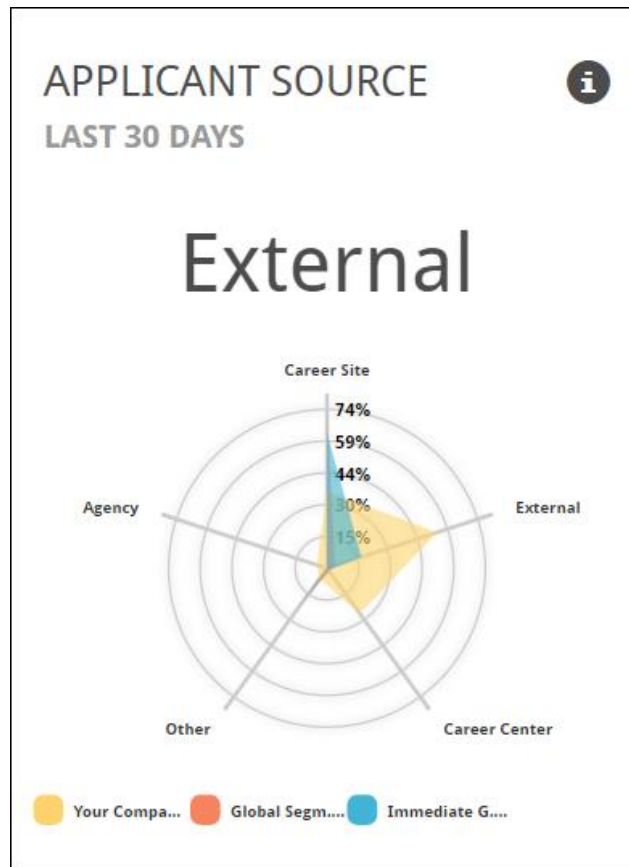
Applicant Source

The Applicant Source widget displays the distribution of applicants with respect to recruiting sources during a selected time period. This helps identify the recruiting sources that attract the highest number of applicants, and also allows you to track your applicants per source over time and determine whether or not you are trending toward reaching set goals. These metrics can also help decide how to utilize recruiting resources to reduce time to hire and improve talent mobility.

The following information is available in the Applicant Source widget:

- **Title** - This field displays the title of the widget.
- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Applicant Source bar chart displays the percentage of applicants for a selected source type, by segment. The My Company line displays where your organization stands amongst its peers.

Click the Applicant Source widget to view and configure segments for the report. See [Applicant Source - Segments](#) on page 94 for additional information.



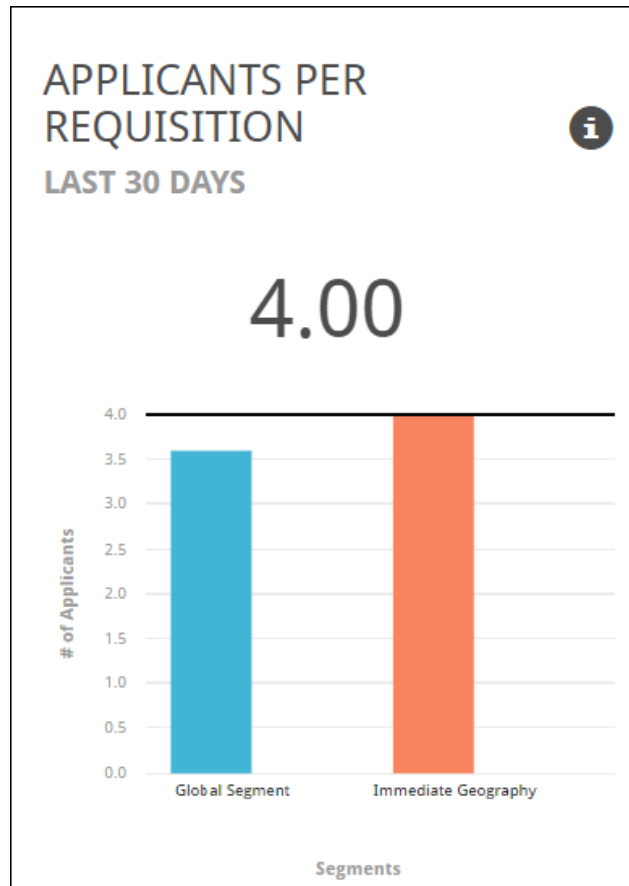
Applicants Per Requisition

The Applicants Per Requisition widget displays the number of applications a job requisition receives during a certain period of time, broken down by recruiting source. This helps identify the median number of applicants per job requisition by recruiting source, to help determine whether or not your organization is leveraging the right sources and using existing sources effectively.

The following information is available in the Applicants Per Requisition widget:

- **Title** - This field displays the title of the widget.
- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Applicants Per Requisition plot chart displays the median number of applicants per requisition, by a selected source type. The My Company line displays where your organization stands amongst your peers.

Click the Applicants Per Requisition widget to view and configure segments for the report. See [Applicants per Requisition - Segments](#) on page 97 for additional information.



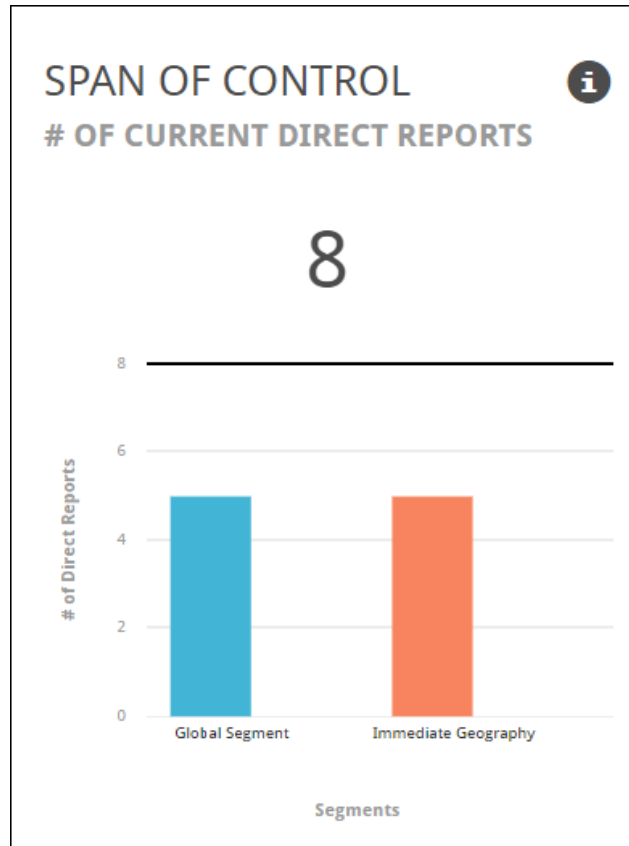
Span of Control

The Span of Control widget displays the median number and distribution of employees reporting to managers throughout the organization. This helps assess the costs and structure of the management staff. The number of direct reports a manager has is referred to as their "span of control." In terms of organizational design, a small number of direct reports creates a narrow span of control and hierarchical structure, also known as a "tall" organization. Narrow spans of control are more expensive for organizations, but they allow managers to have more time with direct reports, and they tend to spark professional growth and advancements. In contrast, a wide span of control refers to a large number of direct reports supervised by one manager, creating a "flat" organization.

The following information is available in the Span of Control widget:

- **Title** - This field displays the title of the widget.
- **# of Current Direct Reports** - This field indicates which how many users classified as direct reports are being analyzed in the widget data.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Span of Control bar chart displays the median number of direct reports for each selected segment.

Click the Span of Control widget to view and configure segments for the report. See [Span of Control - Segments](#) on page 117 for additional information.



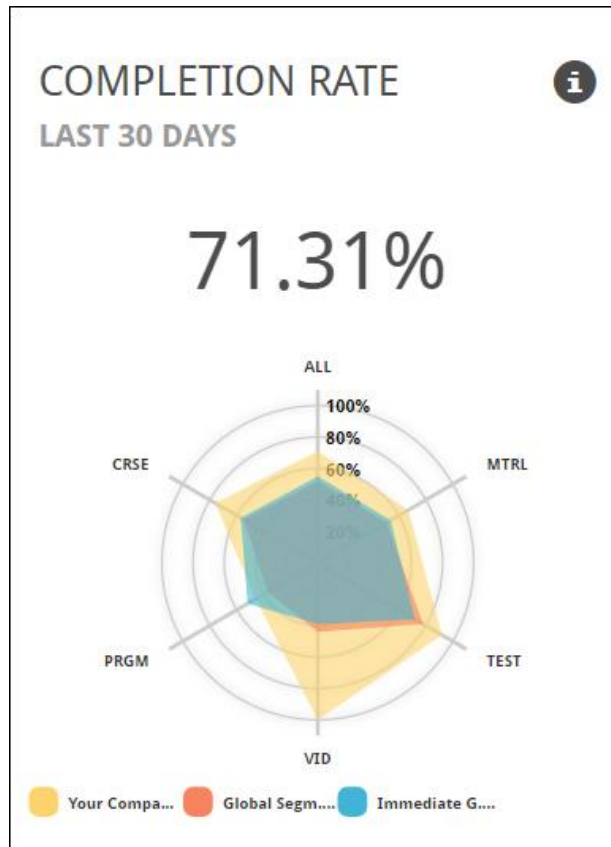
Training Completion Rate

The Training Completion Rate widget helps identify how well your organization has completed outstanding training, compared to your organization's peers. Furthermore, it helps identify the types of training that have the highest completion rate. This information is valuable when deciding to keep or acquire types of content which drive learning more effectively within the organization.

The following information is available in the Training Completion Rate widget:

- **Title** - This field displays the title of the widget.
- **Timeframe** - This field indicates what span of time is being analyzed in the widget.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Training Completion Rate chart displays the average training completion across both your organization and peer organizations. The web graph compares completion rates for various training types for your organization as well as the segments selected.

Click the Training Completion Rate widget to view and configure segments for the report. See [Training Completion Rate - Segments](#) on page 131 for additional information.



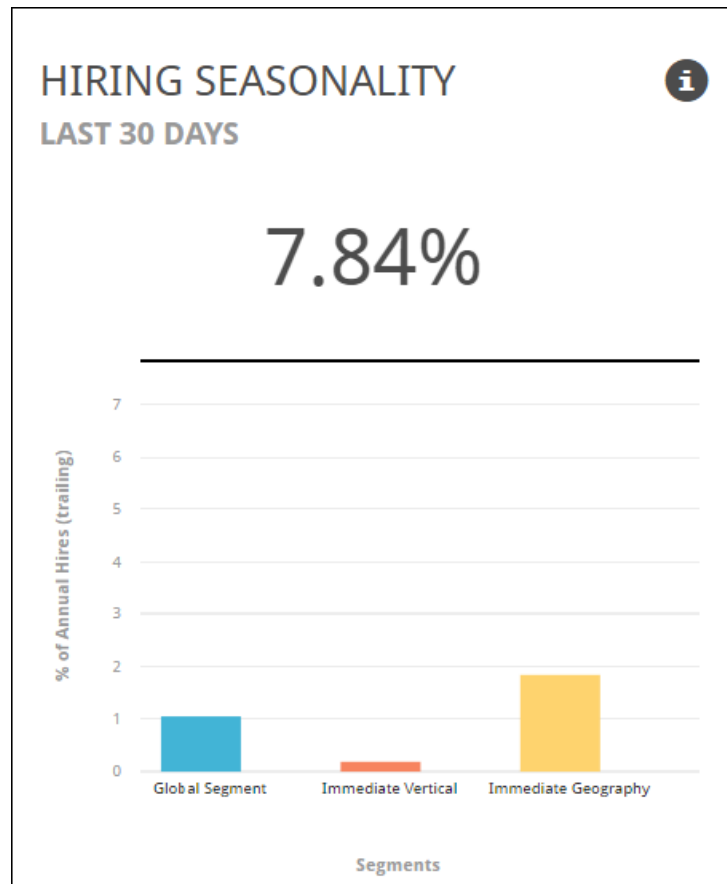
Hiring Seasonality

The Hiring Seasonality widget displays the density of hiring activity time. This helps organizations anticipate how to allocate necessary resources to hire more talent. For example, if hiring seems to increase dramatically in the first quarter of the year, talent management can leverage this metric to allocate recruitment resources ahead of time and effectively reduce time-to-hire for quality candidates.

The following information is available in the Hiring Seasonality widget:

- **Title** - This field displays the title of the widget.
- **Timeframe** - This field displays what span of time is being analyzed in the widget.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Hiring Seasonality chart displays the average percentage of hires across all selected segments.

Click the Hiring Seasonality widget to view and configure segments for the report. [See Hiring Seasonality - Segments](#) on page 109 *for additional information.*



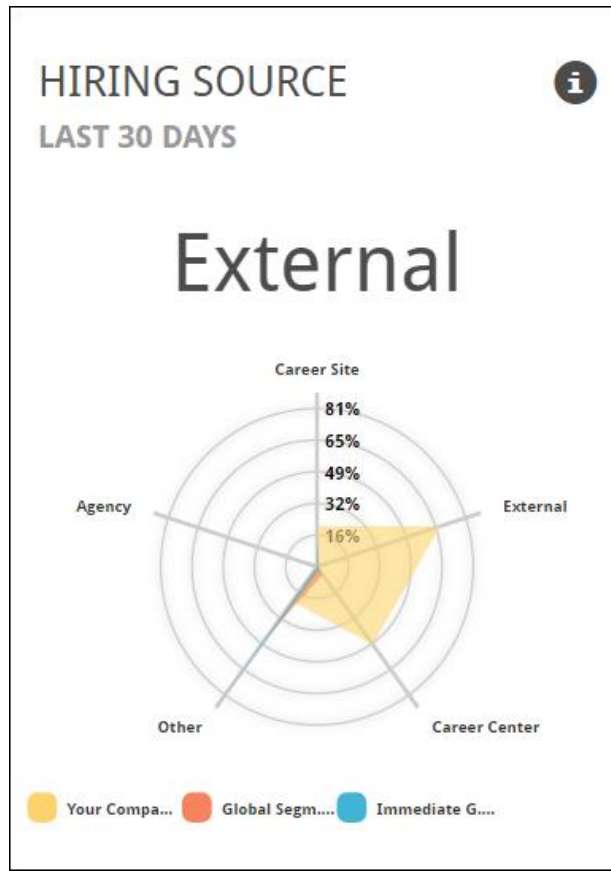
Hiring Source

The Hiring Source widget displays the percentage of distribution for hired applicants, with respect to recruiting sources during a selected period of time. This metric helps identify which recruiting source attracts the highest number of hired applicants, and also allows you to track hired applicants per source over time, and help you understand whether your organization is trending toward reaching set goals.

The following information is available in the Hiring Source widget:

- **Title** - This field displays the title of the widget.
- **Timeframe** - This field indicates the span of time that is being analyzed.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Hiring Source bar chart displays the percentage of hired applicants per segment, by source type. The My Company bar graph displays where your organization stands amongst its peers.

Click the Hiring Source widget to view and configure segments for the report. [See Hiring Source - Segments](#) on page 111 *for additional information.*



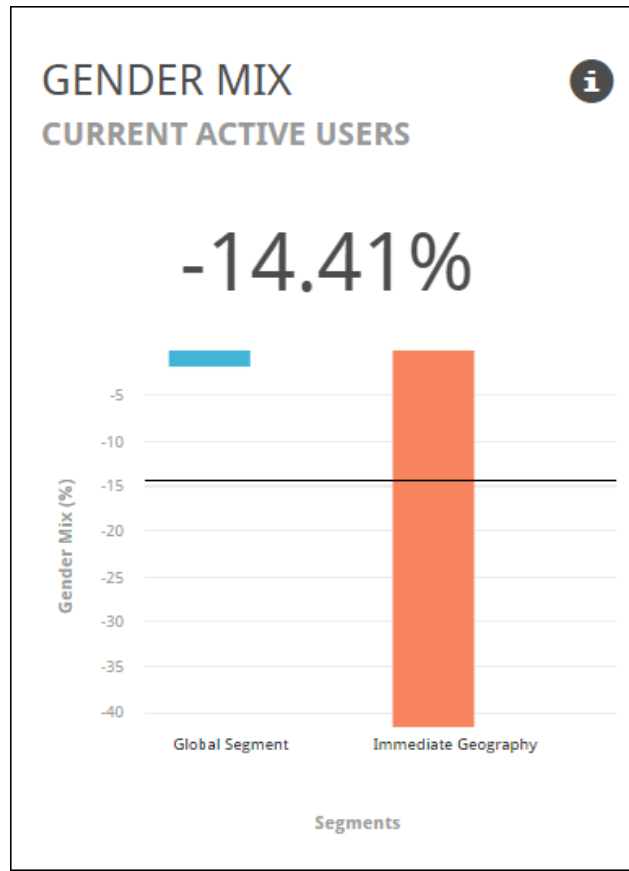
Gender Mix

The Gender Mix widget displays the percentage distribution of gender of your employees at the current point in time. This data helps understand the gender diversity at your organization.

The following information is available in the Gender Mix widget:

- **Title** - This field displays the title of the widget.
- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Gender Mix chart displays the gender mix percentage, along with bar graphs representing the gender mix percentage across selected segments.

Click the Gender Mix widget to view and configure segments for the report. [See Gender Mix - Segments](#) on page 100 *for additional information*.



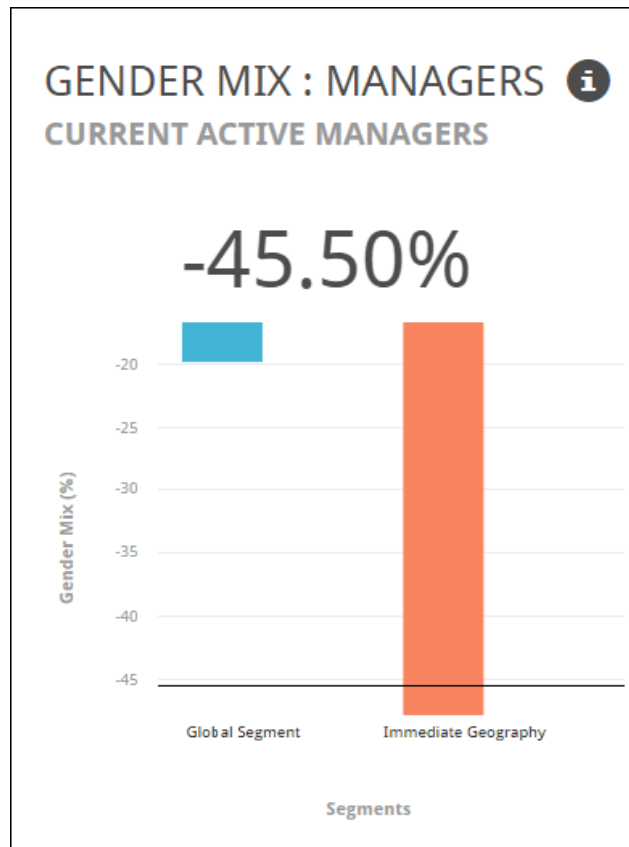
Gender Mix: Managers

The Gender Mix: Managers widget displays the percentage distribution of manager gender. A Manager is considered to be any user with at least one direct report. This data helps determine the gender diversity of managers at your organization.

The following information is available in the Gender Mix: Managers widget:

- **Title** - This field displays the title of the widget.
- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Gender Mix: Managers chart displays the manager gender mix percentage, along with bar graphs representing the manager gender mix percentage across selected segments.

Click the Gender Mix: Managers widget to view and configure segments for the report. [See Gender Mix: Managers - Segments](#) on page 106 for additional information.



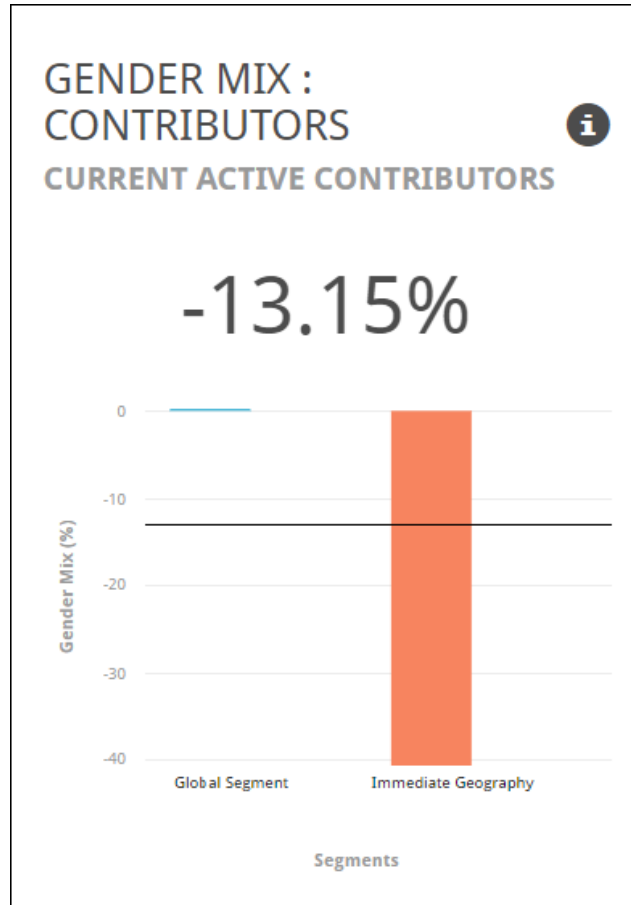
Gender Mix: Contributors

The Gender Mix: Contributors widget displays the percentage distribution of individual contributor gender at the current point in time. An individual contributor is considered any user without at least one direct report. This data helps determine the gender diversity of individual contributors at your organization.

The following information is available in the Gender Mix: Contributors widget:

- **Title** - This field displays the title of the widget.
- **Report demographic** - This field indicates which users are being analyzed in the report.
- **Help Tip** - Hover over this icon to read a description of the widget.
- **Chart** - The Gender Mix: Contributors chart displays the individual contributor gender mix percentage, along with bar graphs representing the individual contributor gender mix percentage across selected segments.

Click the Gender Mix: Contributors widget to view and configure segments for the report. See **Gender Mix: Contributors - Segments** on page 103 for additional information.



Segments Overview

On the Segments page for each metric, each metric displays applicable charts, and the data is broken down by segment. There are five default segments. By hovering over each segment, with the exception of My Company, you can view the Geography, Vertical, and Size specified for the segment. Additionally, you can configure the segments by clicking them. For example, if you click Immediate Vertical, you can customize the segments as needed and view segment data on a more granular level by adjusting the default selections.

Header

The header of the Segments page for each Benchmark widget allows you to view and do the following:

- Drop-down menu: Click the drop-down menu to select a different Benchmark widget to view and configure data for that widget.
- **Title** - The title of the header displays the name of the current widget you are viewing.
- **Learn More** - Click the **Learn More** link to receive a pop-up window with additional information about the type of data the widget displays.
- **Export** - Click the **Export** drop-down menu to export the widget data to one of the following document types:
 - PDF
 - Spreadsheet
- **ADD SEGMENT** - Click the **ADD SEGMENT** button to add a different section to the widget. Select the link for either **Internal Segment** or **External Segment**. See the Add Segment section below for additional details on configuring a segment. **Note:** *If the maximum number of segments has already been selected for the widget, you must delete a segment before adding a new one.*

Add Segment

After clicking the Add Segment button and selecting a segment type, configure the following:

1. **Title** - Click the Edit icon next to the title and enter a title for the new segment. This title will display in the widget.
2. **Description** - Click the Edit icon next to the Add Description field and enter a brief description for the segment you are creating.
3. If creating an internal segment, search for and select an organizational unit for each of the following filters:
 - A. Division
 - B. Position
 - C. Location
4. If creating an external segment, click the Expand icons and choose a value for each of the following filters:
 - A. Industry

- B. Region
- C. Size

5. Click the Add Segment button to add the new segment to the widget.

Segments

Below the header of the Segments page, the different segments that have been selected for the widget display. By clicking a segment, you can edit, copy, and delete the segment if necessary.

- **Title** - Click the Edit icon next to the title to make edits to the segment title.
- **DUPLICATE** - Click the **DUPLICATE** button to make a copy of the segment, which can then be edited without impacting the original.
- **DELETE** - Click the **DELETE** button to delete the segment from the widget.
- **Description** - Click the Edit icon next to the description field to make edits to the segment description.
- **Details** - The Details section of the segment displays the following data:
 - **Users** - This is the number of users captured by the segment.
 - **Companies** - This is the number of companies captured by the segment.
 - **Regions** - This is the number of regions captured by the segment.
 - **Industries** - This is the number of industries captured by the segment.
 - **Filters** - To make changes to the selected filters, either click the criteria selected for the filter or click the Add icon to select a new unit for the filter.

Default Segments

Five default segments are available. The five default segments include:

- **My Company** - Includes your organization's entire portal
- **Global Segments** - Includes all client portals from all geographies, verticals, and sizes
- **Immediate Vertical** - Includes all client portals from your organization's specific Vertical, of all geographies and sizes
- **Immediate Geography** - Includes all client portals from your organization's specific Geography, of all verticals and sizes
- **Size Group** - Includes all portals that are in the same size group as your organization, of all geographies and verticals



Metric Details

The bottom of each Segments page displays a Details section. The Details section shows similar information to the specific charts provided for each metric, but the information is displayed in a table format, broken down by segment. There are four different columns within the Details section:

- Median - This column displays the median of averages value for the segment
- Delta - This column displays your organization's median, minus the segments median
- Percentile - This column displays the percentage where your organization's median rests, compared to other organizations in the segment.
- Rank - This column displays the rank of your organization's median against the segment

Details				
Segment	Median ⓘ	Delta ⓘ	Percentile ⓘ	Rank ⓘ
Global Segment	5.00	-1.00 ▼	57.08	520 out of 1300
Immediate Vertical	4.00	0.00	50.00	20 out of 40
Immediate Geography	5.00	-1.00 ▼	17.08	205 out of 1200

Applicant Source - Segments

The Applicant Source segments page displays three different charts:

- Segment Data
- Historical Segment Data
- Averages of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 for additional information.

To access the Applicant Source segments page, go to ADMIN > TOOLS > BENCHMARK and click the Applicant Source report widget.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data bar chart displays the percentage of applicants for the source type selected, by segment. The **My Company** line displays where your organization stands amongst its peers. The **Proportion** line analyzes the entire distribution’s proportion based on the selected source type. For example, if the Career Site source is selected, and the proportion calculation is 80%, this means that 80% of applicants for that segment apply through the Career Site.

To select a source type, click the **Type** drop-down menu below the Segment Data chart and choose a source from the list. The chart data will refresh accordingly.

Historical Segment Data

The Historical Segment Data bar chart displays the percentage of applicants by segment, for the selected source type, by the selected time interval. This is the same data displayed in the Segment Data chart above, except the Historical Segment Data chart shows how the data across segments has changed over time.

To change the time interval for the chart, click the **By:** drop-down menu and choose from the following time intervals:

- Month
- Quarter
- Year

After selecting a new time interval, the chart data will refresh accordingly.

Averages of Portals

The Average of Portals plot provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations display an average 40% of applicants applying from a Career Site, and one of the five has many more applicants than the others and shows an average of 85% applying from the Career Site, the organization with 85% of applicants from the Career Site may skew the data. To avoid potentially skewed data, the Averages of Portals graph uses the applicant source percentage of each portal, rather than the applicant source percentage from all applicants in the entire segment. By using the Averages of Portals chart, you can avoid potentially skewed data by viewing the average of averages.

Applicants per Requisition - Segments

The Applicants per Requisition segments page displays three different charts:

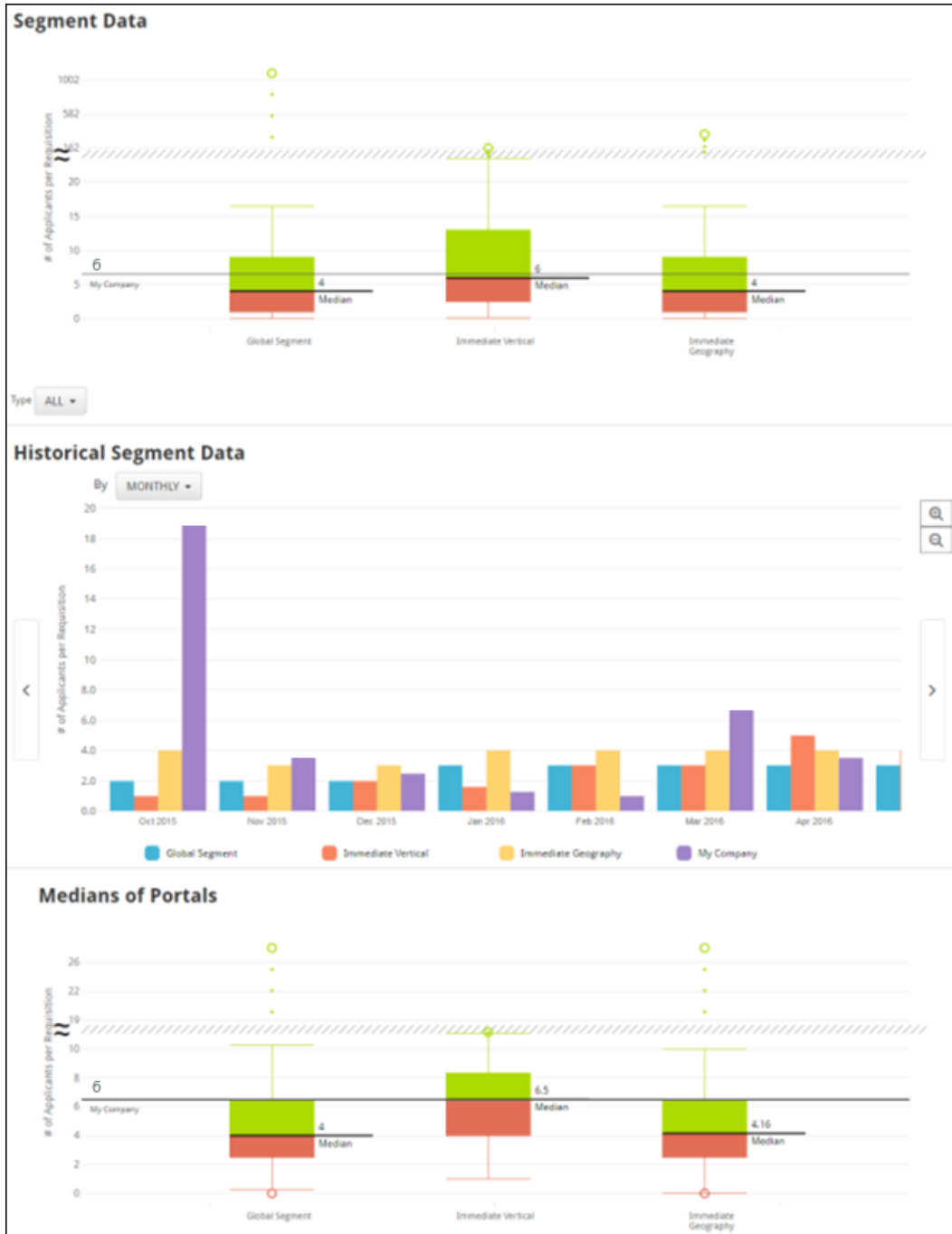
- Segment Data
- Historical Segment Data
- Medians of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 *for additional information*.

To access the Applicants per Requisition segments page, go to **ADMIN > TOOLS > BENCHMARK** and click the Applicants per Requisition report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the median number of applicants per requisition, by selected source type. The My Company line displays where your organization stands amongst its peers. Applicants per requisition across all portals are included in the segment.

To select a source type, click the **Type** drop-down menu below the Segment Data chart and choose a source from the list. The chart data will refresh accordingly.

Historical Segment Data

The Historical Segment Data bar chart displays the percentage of applicants per requisition, by segment, for the selected source type, by the selected time interval. This is the same data displayed in the Segment Data chart above, except the Historical Segment Data chart shows how the data across segments has changed over time.

To change the time interval for the chart, click the **By:** drop-down menu and choose from the following time intervals:

- Month
- Quarter
- Year

After selecting a new time interval, the chart data will refresh accordingly.

Medians of Portals

The Medians of Portals box provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations have averages of five applicants per requisition, and one of the five organizations has many more requisitions than the other organizations and also has an average of 50 applicants per requisition, the organization with 50 applicants may skew the data. To avoid potentially skewed data, the Medians of Portals chart uses the median applicants per requisition of each portal rather than the applicants per requisition of all requisitions in the entire segment. By using the Medians of Portals chart, you can avoid potential potentially skewed data by viewing the median of medians.

Gender Mix - Segments

The Gender Mix segments page displays three different sets of charts:

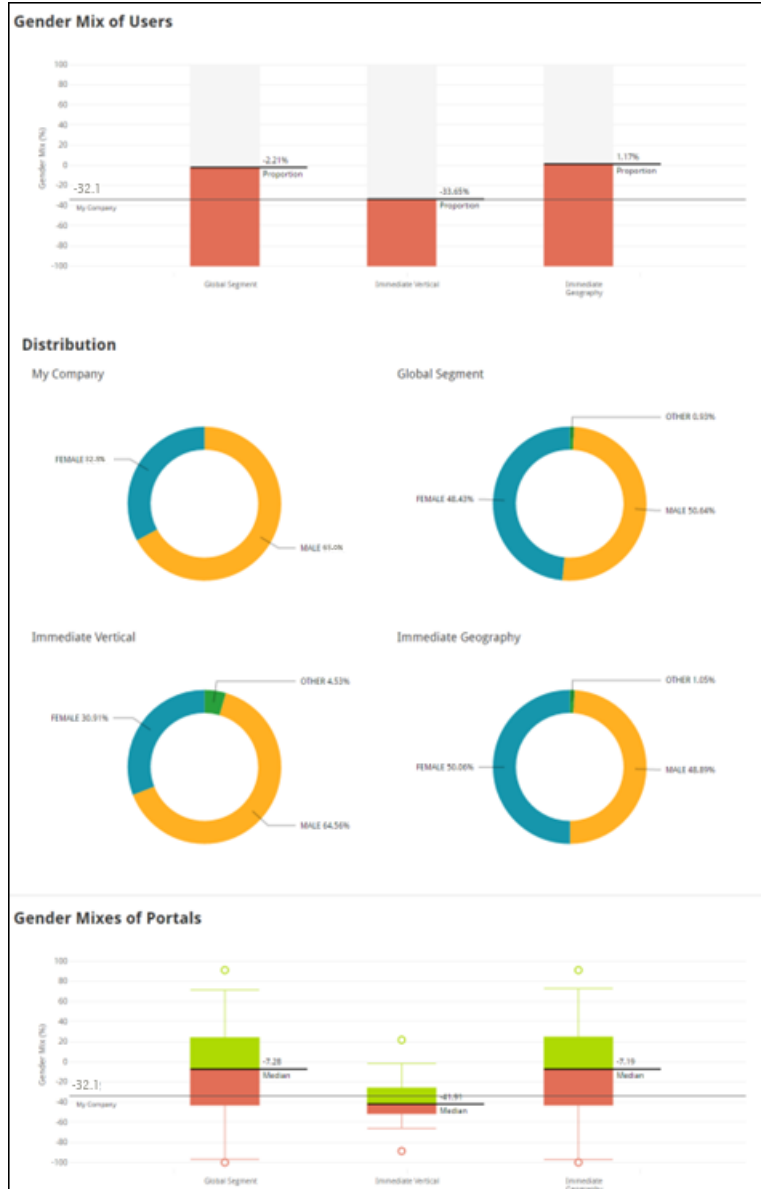
- Gender Mix of Users
- Distribution
- Gender Mixes of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 *for additional information*.

To access the Gender Mix segments page, go to **ADMIN > TOOLS > BENCHMARK** and click the Gender Mix report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Gender Mix of Users

The Gender Mix of Users charts at the top of the page display the gender percentage mix of all users for each segment. The Proportion line is the gender percentage mix of all females subtracted by males for that particular segment. The My Company line indicates where your organization’s gender mix stands compared to the different segments.

Distribution

The Distribution charts provide an overview of the gender percentage differences by segment. If Other displays, this means there is text other than “male,” “female,” “m,” or “f,” on the employee's user record in the system.

Gender Mixes of Portals

The Gender Mixes of Portals charts display the gender mix percentages between portals. For example, if five portals are included in a segment, the median number shown is the median percentage of those five portals. This data can help determine if a particular segment has the potential to skew the results. For example, if one of the five portals in a segment has many more employees and a significantly different gender mix than the other four portals in the segment, it may help to evaluate the gender mixes of portals for that segment to avoid a potentially skewed distribution. To avoid potentially skewed data, the gender mixes of Portals charts use the gender mixes of each portal, rather than the Gender Mix of all users in the entire segment.

Gender Mix: Contributors - Segments

The Gender Mix: Contributors segments page displays three different sets of charts:

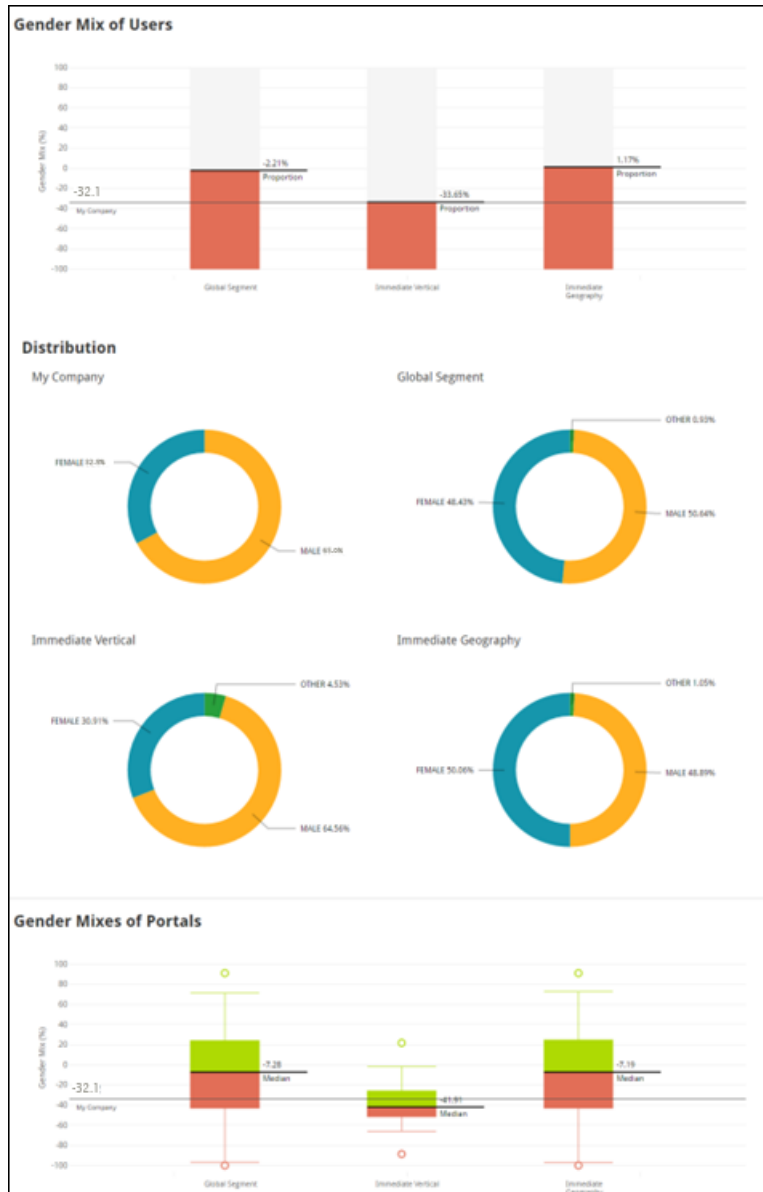
- Gender Mix of Users
- Distribution
- Gender Mixes of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. [See Segments Overview](#) on page 91 *for additional information*.

To access the Gender Mix: Contributors segments page, go to **ADMIN > TOOLS > BENCHMARK** and click the Gender Mix: Contributor report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Gender Mix of Users

The Gender Mix of Users charts at the top of the page display the individual contributor gender percentage mix of all users for each segment. The Proportion line is the gender percentage mix of all females subtracted by males for that particular segment. The My Company line indicates where your organization’s gender mix stands compared to the different segments.

Distribution

The Distribution charts provide an overview of the individual contributor gender percentage differences by segment. If Other displays, this means there is text other than “male,” “female,” “m,” or “f,” on the employee’s user record in the system.

Gender Mixes of Portals

The Gender Mixes of Portals charts display the individual contributor gender mix percentages between portals. For example, if five portals are included in a segment, the median number shown is the median percentage of those five portals. This data can help determine if a particular segment has the potential to skew the results. For example, if one of the five portals in a segment has many more employees and a significantly different individual contributor gender mix than the other four portals in the segment, it may help to evaluate the gender mixes of portals for that segment to avoid a potentially skewed distribution. To avoid potentially skewed data, the Gender Mixes of Portals charts use the individual contributor gender mixes of each portal, rather than the gender mix of all individual contributors in the entire segment.

Gender Mix: Managers - Segments

The Gender Mix: Managers segments page displays three different sets of charts:

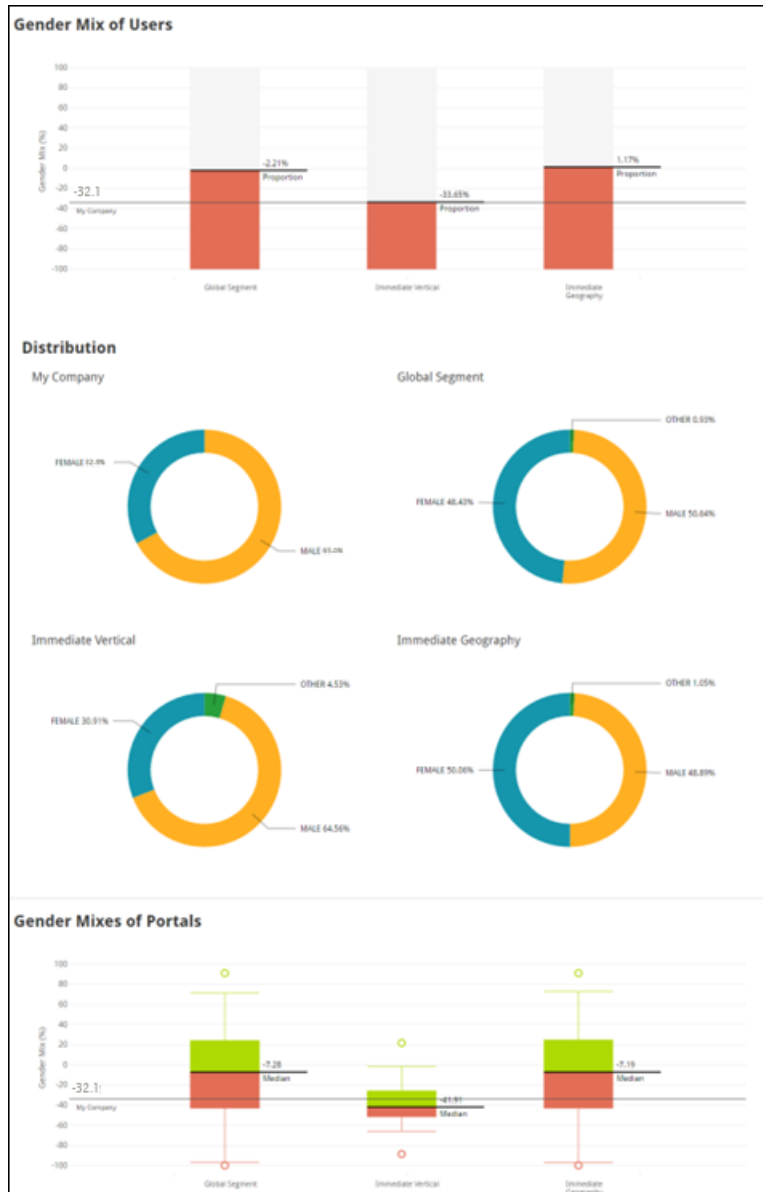
- Gender Mix of Users
- Distribution
- Gender Mixes of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 *for additional information*.

To access the Gender Mix: Managers segments page, go to **ADMIN > TOOLS > BENCHMARK** and click the Gender Mix: Managers report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Gender Mix of Users

The Gender Mix of Users charts at the top of the page display the manager gender percentage mix of all users for each segment. The Proportion line is the gender percentage mix of all females subtracted by males for that particular segment. The My Company line indicates where your organization’s manager gender mix stands compared to the different segments.

Distribution

The Distribution charts provide an overview of the manager gender percentage differences by segment. If Other displays, this means there is text other than “male,” “female,” “m,” or “f,” on the manager’s user record in the system.

Gender Mixes of Portals

The Gender Mixes of Portals charts display the manager gender mix percentages between portals. For example, if five portals are included in a segment, the median number shown is the median percentage of those five portals. This data can help determine if a particular segment has the potential to skew the results. For example, if one of the five portals in a segment has many more managers and a significantly different manager gender mix than the other four portals in the segment, it may help to evaluate the gender mixes of portals for that segment to avoid a potentially skewed distribution. To avoid potentially skewed data, the Gender Mixes of Portals charts use the manager gender mixes of each portal, rather than the gender mix of all managers in the entire segment.

Hiring Seasonality - Segments

The Hiring Seasonality segments page displays two different charts:

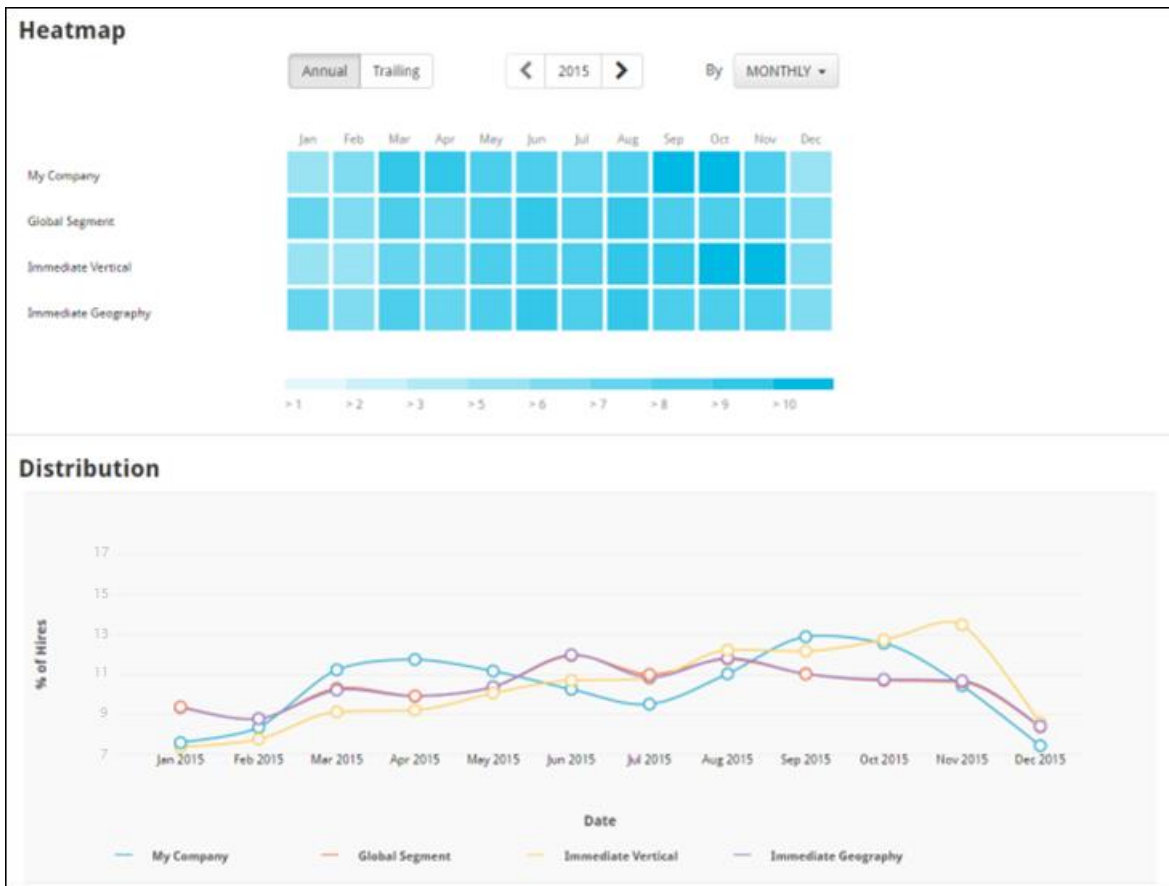
- Heatmap
- Distribution

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. [See Segments Overview](#) on page 91 for additional information.

To access the Hiring Seasonality segments page, go to ADMIN > TOOLS > BENCHMARK and click the Hiring Seasonality report widget.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Heatmap

Hiring Seasonality shows the density of hiring activity over the course of a year. The heatmap shows this data over the span of a year with colored tiles. Each tile is the percentage of hires for the specified time span vs. hires for the year. The darker the tile, the more hires for the selected unit of time.

The following filters can be applied to the heatmap:

- Annual/Trailing - Select the associated tab to switch the heatmap data to either annual data or trailing data.
- Year - Use the navigational arrows on either side of the Year filter to see a specific year's hiring seasonality data.
- Timespan - Select an increment of time from the drop-down menu to see hiring seasonality for the year broken down by any of the following:
 - Monthly
 - Quarterly

Distribution

The Distribution line chart shows the percentage of hires throughout the entire year, for each segment. Each segment is color-coded.

Hiring Source - Segments

The Hiring Source segments page displays three different charts:

- Segment Data
- Historical Segment Data
- Averages of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 *for additional information*.

To access the Hiring Source segments page, go to ADMIN > TOOLS > BENCHMARK and click the Hiring Source report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data bar chart displays the percentage of hired applicants for the source type selected, by segment. The **My Company** line displays where your organization stands amongst its peers. The **Proportion** line analyzes the entire distribution's proportion based on the selected source type. For example, if the Career Site source is selected, and the proportion calculation is 80%, this means that 80% of hired applicants for that segment apply through the Career Site.

To select a source type, click the **Type** drop-down menu below the Segment Data chart and choose a source from the list. The chart data will refresh accordingly.

Historical Segment Data

The Historical Segment Data bar chart displays the percentage of hired applicants by segment, for the selected source type, by the selected time interval. Month, Quarter, or Year. This is the same data displayed in the Segment Data chart above, except the Historical Segment Data chart shows how the data across segments has changed over time.

To change the time interval for the chart, click the **By:** drop-down menu and choose from the following time intervals:

- Month
- Quarter
- Year

After selecting a new time interval, the chart data will refresh accordingly.

Averages of Portals

The Average of Portals plot provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations display an average 40% of hired applicants applying from a Career Site, and one of the five has many more hired applicants than the others and shows an average of 85% applying from the Career Site, the organization with 85% of hired applicants from the Career Site may skew the data. To avoid potentially skewed data, the Averages of Portals graph uses the hired applicant source percentage of each portal, rather than the hired applicant source percentage from all hired applicants in the entire segment. By using the Averages of Portals chart, you can avoid potentially skewed data by viewing the average of averages.

On Time Completion Rate - Segments

The On Time Completion Rate segments page displays three different charts:

- Segment Data
- Average Completion Rates
- Averages of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 *for additional information*.

To access the On Time Completion Rate segments page, go to ADMIN > TOOLS > BENCHMARK and click the On Time Completion Rate report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the average percentage of training completed on time for organizations by segment. Each segment is a distribution of the on-time training completion rates of training across all portals. The My Company line displays where your organization's on-time training completion falls amongst its peers.

To select a training type, click the **Type** drop-down menu below the Segment Data chart and choose a training type from the list, or choose **All** to include all training types. The chart data will refresh accordingly.

Average Completion Rates

The Average Completion Rates bar chart shows the average on-time training completion for your organization vs. the segments selected, broken down by the selected time interval. The Average Completion Rates chart displays the same data as the Segment Data chart above, except it shows how the data across segments has changed over time.

To change the time interval for the chart, click the **By:** drop-down menu and choose from the following time intervals:

- Month
- Quarter
- Year

After selecting a new time interval, the chart data will refresh accordingly.

Averages of Portals

The Average of Portals plot provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations have on-time training completion averages of 30-50%, and one of the five has many more on-time completions than the other portals and also has an average on-time completion rate of 100%, the organization with the 100% on-time completion rate may skew the average on-time training completion. By using the Averages of Portals chart, you can avoid potential outliers, as this data shows the average of averages. To avoid potentially skewed data, the Averages of Portals chart uses the on-time completion rates of each portal, rather than the on-time completion rate of all training in the entire segment.

Span of Control - Segments

The Span of Control segments page displays two different charts:

- Segment Data
- Medians of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. [See Segments Overview](#) on page 91 for additional information.

To access the Span of Control segments page, go to ADMIN > TOOLS > BENCHMARK and click the Span of Control report widget.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the median number of direct reports for each segment. The four major sections of the chart, divided by dotted lines, are the quartile groups of the

distribution. The stripe through the middle of the chart is the Scale Break. The Scale Break appears when the values on the Y-axis are increasing, denoting a break in continuity. The circle at the top of the chart displays the Outlier Max Value, which is the highest value for the segment. For Span of Control example, it would be the highest number of direct reports one employee has, in one organization.

Medians of Portals

The Medians of Portals chart provides helpful data when there are portals which have the potential to skew the Segment Data chart. For example, if one of the five portals in a segment has many more direct reports per user and far more users than the other four portals in the segment, it may help to evaluate the Medians of Portals for that segment and avoid a potentially skewed distribution. To avoid potentially skewed data, the Medians of Portals chart uses the median spans of each portal, rather than the spans of all managers in the entire segment.

Tenure - Segments

The Tenure segments page displays two different charts:

- Segment Data
- Medians of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. [See Segments Overview](#) on page 91 *for additional information*.

To access the Tenure segments page, go to ADMIN > TOOLS > BENCHMARK and click the Tenure report widget.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the median number of years employees stay with an organization. The Median line is the median number of years for all organizations' users within the segment. The stripe through the middle of the chart is the Scale Break. The Scale Break appears when the values on the Y-axis are increasing, denoting a break in continuity. The circle at the top of the chart displays the Outlier Max Value, which is the highest value for the segment. For Tenure, the Outlier Max Value would be highest number of years for one organization, within the segment.

Medians of Portals

The Medians of Portals chart provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations has a median employee tenure of three years, and one of the five organizations has many more users than the others and also has a median employee tenure of 20, the larger organization may skew the data for a segment. To avoid potentially skewed data, the Medians of Portals chart uses the median tenures of

each portal, rather than the tenures of all users in the entire segment. By using the Medians of Portals, you can avoid potentially skewed data, since it displays the medians of medians.

Tenure: Contributors - Segments

The Tenure: Contributors segments page displays two different charts:

- Segment Data
- Medians of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. [See Segments Overview](#) on page 91 *for additional information*.

To access the Tenure: Contributors segments page, go to **ADMIN > TOOLS > BENCHMARK** and click the Tenure: Contributors report widget.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the median number of years individual contributors stay with an organization. The Median line is the median number of years for all organizations' individual contributors within the segment. The stripe through the middle of the chart is the Scale Break. The Scale Break appears when the values on the Y-axis are increasing, denoting a break in continuity. The circle at the top of the chart displays the Outlier Max Value, which is the highest value for the segment. For Tenure, the Outlier Max Value would be highest number of years for one organization, within the segment.

Medians of Portals

The Medians of Portals chart provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations has a median individual contributor tenure of three years, and one of the five organizations has many more individual contributors than the others and also has a median individual contributor tenure of 20, the larger organization may skew the data for a segment. To avoid potentially skewed data, the

Medians of Portals chart uses the median individual contributor tenures of each portal, rather than the tenures of all users in the entire segment. By using the Medians of Portals, you can avoid potentially skewed data, since it displays the medians of medians.

Tenure: Managers - Segments

The Tenure: Managers segments page displays two different charts:

- Segment Data
- Medians of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. [See Segments Overview](#) on page 91 *for additional information*.

To access the Tenure: Managers segments page, go to ADMIN > TOOLS > BENCHMARK and click the Tenure: Managers report widget.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the median number of years managers stay with an organization. The Median line is the median number of years for all organizations' managers within the segment. The stripe through the middle of the chart is the Scale Break. The Scale Break appears when the values on the Y-axis are increasing, denoting a break in continuity. The circle at the top of the chart displays the Outlier Max Value, which is the highest value for the segment. For Tenure, the Outlier Max Value would be highest number of years for one organization, within the segment.

Medians of Portals

The Medians of Portals chart provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations has a median manager tenure of three years, and one of the five organizations has many more managers than the others and also has a median manager tenure of 20, the larger organization may skew the data for a segment. To avoid potentially skewed data, the Medians of Portals chart uses the median

manager tenures of each portal, rather than the tenures of all managers in the entire segment. By using the Medians of Portals, you can avoid potentially skewed data, since it displays the medians of medians.

Time to Fill - Segments

The Time to Fill segments page displays three different charts:

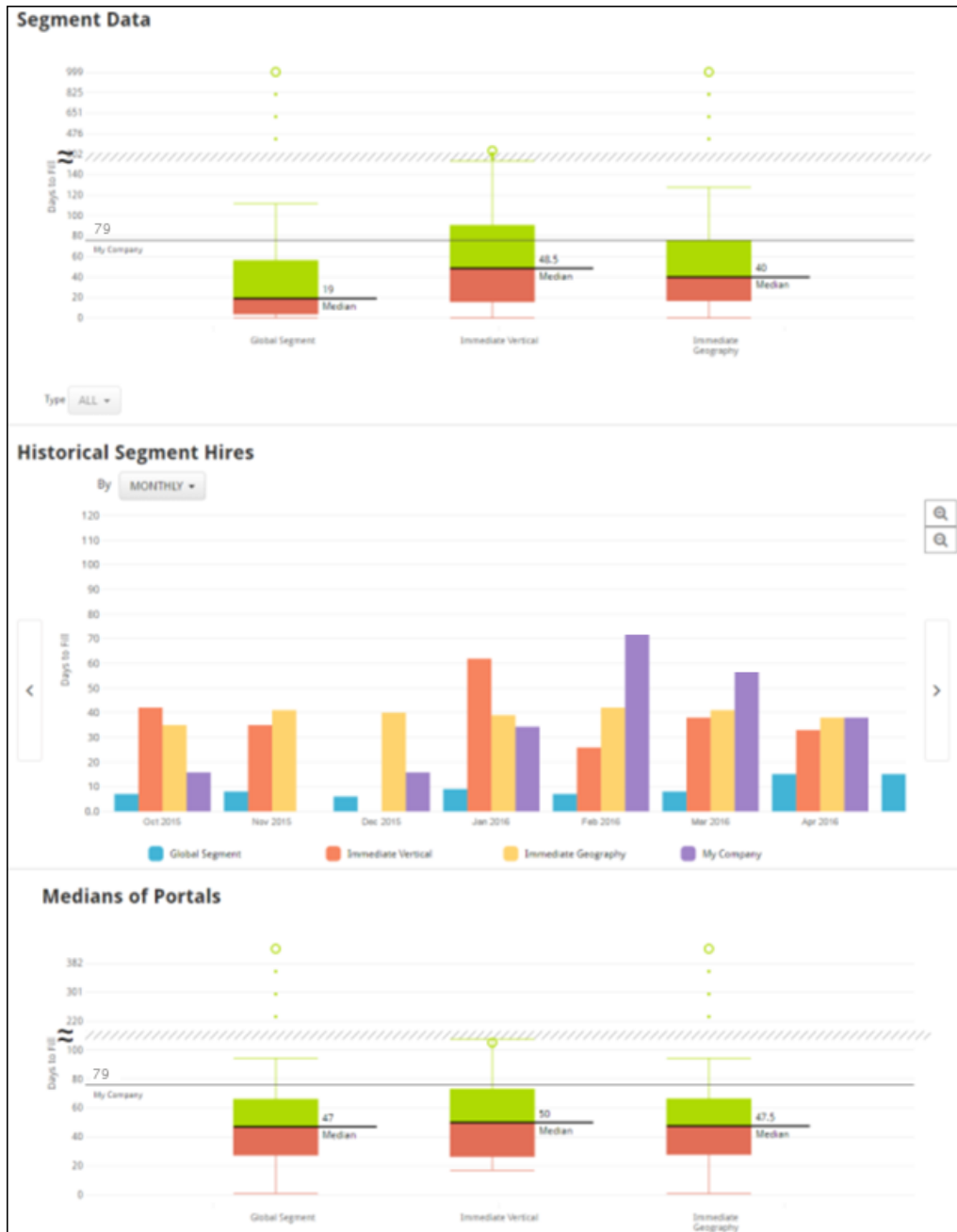
- Segment Data
- Historical Segment Hires
- Medians of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 *for additional information*.

To access the Time to Fill segments page, go to ADMIN > TOOLS > BENCHMARK and click the Time to Fill report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the average number of days it took to fill a requisition, by segment. The My Company line displays the average number of days it took your organization to fill a requisition, compared to its peers. Requisitions across all portals are included in the segment.

To select a requisition type, click the **Type** drop-down menu below the Segment Data chart and choose a requisition type from the list. The chart data will refresh accordingly.

Historical Segment Hires

The Historical Segment Hires bar chart displays the average numbers of days to fill a requisition, constrained by the selected time interval. This is the same data displayed in the Segment Data chart above, except the Historical Segment Hires chart shows how the data across segments has changed over time.

To change the time interval for the chart, click the **By:** drop-down menu and choose from the following time intervals:

- Month
- Quarter
- Year

After selecting a new time interval, the chart data will refresh accordingly.

Medians of Portals

The Medians of Portals box provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations have a median of 30 days to fill a position, but one of the five has many more filled positions than the others, and also has a median of 200 days to fill, the organization that takes 200 days to fill positions may skew the data. To avoid potentially skewed data, the Medians of Portals chart uses the median time to fill of each portal, rather than the time to fill of all positions in the entire segment. By using the Medians of Portals chart, you can avoid potentially skewed data, as this chart displays the medians of medians.

Training Completion Rate - Segments

The Training Completion Rate segments page displays three different charts:

- Segment Data
- Average Completion Rates
- Averages of Portals

In addition to the charts described on this page, each metric's Segments page allows you to view and configure verticals and view metric details. See **Segments Overview** on page 91 *for additional information*.

To access the Training Completion Rate segments page, go to **ADMIN > TOOLS > BENCHMARK** and click the Training Completion Rate report widget.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Benchmark Total Access	This permission provides total access to the Benchmark metrics and functionality.	Benchmark - Administration



Segment Data

The Segment Data chart displays the average percentage of training completions for organizations by segment. Each segment is a distribution of the training completion rates of training across all portals. The My Company line displays where your organization's training completion falls amongst its peers.

To select a training type, click the **Type** drop-down menu below the Segment Data chart and choose a training type from the list, or choose **All** to include all training types. The chart data will refresh accordingly.

Average Completion Rates

The Average Completion Rates bar chart shows the average training completion for your organization vs. the segments selected, broken down by the selected time interval. The Average Completion Rates chart displays the same data as the Segment Data chart above, except it shows how the data across segments has changed over time.

To change the time interval for the chart, click the **By:** drop-down menu and choose from the following time intervals:

- Month
- Quarter
- Year

After selecting a new time interval, the chart data will refresh accordingly.

Averages of Portals

The Average of Portals plot provides helpful data when there are portals in the Segment Data chart that might be skewing the data. For example, if there is a segment with five organizations, and four out of the five organizations have averages of training completion between 30-50%, and one of the five has many more completions than the other portals and also has an average completion rate of 100%, the organization with the 100% completion rate may skew the average training completion. By using the Averages of Portals chart, you can avoid potential outliers, as this data shows the average of averages. To avoid potentially skewed data, the Averages of Portals chart uses the completion rates of each portal, rather than the completion rate of all training in the entire segment.

Compensation

Configurable Merit Matrix

Configurable Merit Matrix

A compensation merit matrix provides recommendations for compensation increases. The merit matrix takes into account where the employee stands in their salary range and their performance score and gives compensation managers a recommended increase range.

Prior to this enhancement, when creating adjustment guidelines for a merit increase, administrators could not configure merit matrix compa-ratio columns and Performance rows.

With this enhancement, when creating adjustment guidelines for a merit increase, a new editable recommendation matrix is now available. This new matrix option enables administrators to completely configure a merit matrix using compa-ratio and performance scores in order to be more specific with recommendations. Organizations have the option to continue using the previously existing Recommendation Matrix option or use the new Editable Recommendation Matrix option.

Recommendations from the configurable merit matrix are included in the Individual Adjustments Report.

The following list explains key differences between the old Recommendation Matrix option and the new Editable Recommendation Matrix option:

- The configurable matrix can be used for Base, Bonus, or Equity components. **Note:** *Recommendation matrices cannot be created for Target components or Equity components that are allocated in Options or Shares.* The non-configurable matrix is available to limited components.
- Administrators can add 15 rows and columns to the configurable matrix.
- Compa Ratio column widths are fully configurable with the configurable matrix. The configurable matrix does not have the above range or below range options for compa-ratio. The configurable matrix has the option to start from 0.00 compa-ratio and end with a max compa-ratio (infinity). Everything in between is configurable.
- Performance Score range heights are fully configurable with the configurable matrix. The configurable matrix has the option to start from 0% Performance score to 100%. Everything in between is configurable.

Considerations

Current merit matrices are not be affected by this enhancement. This enhancement introduces a new Editable Merit Matrix selection, so organizations that want to use the editable version have the option.

As previously implemented, if there are two recommendations for a user, the system provides the higher of the two values.

Implementation

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

Existing merit matrices are not affected by this enhancement.

Security

The following existing permission applies 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

Adjustment Guideline - Editable Recommendation Matrix

With this enhancement, when creating adjustment guidelines for a merit increase, a new editable recommendation matrix is now available. This new matrix option enables administrators to completely configure a merit matrix using compa-ratio and performance scores in order to be more specific with recommendations. Organizations have the option to continue using the previously existing Recommendation Matrix option or use the new Editable Recommendation Matrix option.

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 Guideline Type - Editable Recommendation Matrix

When creating an adjustment guideline, the **Type** is specified in the *Details* section. This can be set to Editable Recommendation Matrix, which enables administrators to completely configure a merit matrix that takes into account where an employee stands in their salary range and their performance score and gives compensation managers a recommended increase range.

The Editable Recommendation Matrix option is available when creating adjustment guidelines for Base, Bonus, or Equity components. **Note:** *Recommendation matrices cannot be created for Target components or Equity components that are allocated in Shares.*

Adjustment Guidelines Show Me

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:

COMPONENT

Type: Please select the component type before proceeding.

Components:

DETAILS

Effective Period: From: To:

Type:
 Specific Amount
 Recommendation Matrix
 Editable Recommendation Matrix
 Custom Formula

Currency: USD

Adjustment - Create Matrix

When setting the matrix parameters for an Editable Recommendation Matrix, the matrix can include a maximum of 15 rows and 15 columns.

- **Matrix Rating out of** - This drop-down contains values 1-15 to allow the matrix to contain up to 15 rows.
- **Total Columns** - This functionality varies, depending on whether a base, bonus, or equity adjustment guideline is being created.
 - Base Components - When creating an adjustment guideline for a base component, this drop-down contains values 1-15 to allow the matrix to contain up to 15 columns.
 - Bonus or Equity Components - When creating an adjustment guideline for a bonus or equity component, the total columns is set to 1, and this cannot be modified.

Adjustment - Create Matrix for Base Components

When the **Create Matrix** link is selected, the Editable Recommendation Matrix is created in the *Adjustment* section.

- **Matrix Rating** - As with the Recommendation Matrix, the Matrix Ratings appear along the left side the matrix rows. These values represent percentages of the maximum matrix rating. For example, 100% indicates that the user received the maximum possible rating for the selected metric. The bottom row always begins at 0%, and the top row always ends at 100%. The values within the row headings can be fully

matrix rating. For example, 100% indicates that the user received the maximum possible rating for the selected metric. The bottom row always begins at 0%, and the top row always ends at 100%. The values within the row headings can be fully customized, and the starting percentages for each row (excluding the bottom row, which automatically begins at 0%) is automatically set based on the ending percentage of the previous row. For example, if the previous row ends at 10.15%, then the row above it will begin at 10.16%. The percentage values use the portal's default decimal precision rate.

- % Attained of Target - When creating an adjustment guideline for a bonus component, only one column is displayed, and that is the % Attained of Target column.
- % of Base - When creating an adjustment guideline for an equity component, only one column is displayed, and that is the % of Base column.

A value must be entered for all entries in the Editable Recommendation Matrix, as these values will drive recommendations in the compensation plans.

ADJUSTMENT

Target Award: % of Base
 USD *
 Individual Targets

Discretionary
 Non-Discretionary

* Please define matrix rating and columns before creating matrix

Matrix Rating out of: ▼

[+ Add Metric](#)

Define Columns:
Total Columns: 1

Metric: % of Base

[📄 Create Matrix](#)

Matrix Rating		% of Base
#% -	<input type="text" value="100.0"/> %	<input type="text"/> % - <input type="text"/> %
#% -	<input type="text"/> %	<input type="text"/> % - <input type="text"/> %
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0.0% -	<input type="text"/> %	<input type="text"/> % - <input type="text"/> %

Compensation Plan - Recommendations

With this enhancement, when creating adjustment guidelines for a merit increase, a new editable recommendation matrix is now available. This new matrix option is available when creating adjustment guidelines for Base, Bonus, or Equity components. As a result, recommendations may be available for all base components as well as bonus and equity components in a compensation plan.

In addition, when downloading individual adjustments for a user, the recommendations from an editable recommendation matrix are reflected in the report.

Core

Data Load Wizard - Display Threshold

An error threshold is set for data loads, and if an administrator attempts to load a file in which the error threshold is exceeded, then the file is not loaded to the system. For example, if the error threshold is set at 50%, and an administrator attempts to load a file in which more than 50% of the records in the file have an error, then the file is not loaded and no records are updated.

Prior to this enhancement, if the error threshold were exceeded, the Data Feed Email Log and the Data Load Preview would indicate that the non-error records were or would be updated, which falsely led administrators to believe that some files were updated.

With this enhancement, the Data Feed Email Log and Track Data Loads Preview now state if the file was not processed due to threshold limit. This enables administrators to better understand when a file is not properly loaded due to the error threshold being reached. This also enables administrators to understand that no records were updated because the error threshold was reached.

Use Cases

1. Acme Corp. has an error threshold of 50% for their Data Load Wizard, so if more than 50% of the records in a file contain an error, then the file is not loaded and no records are updated.
2. An administrator at Acme Corp. attempts to load a file of 803 user records, and the Data Load Wizard identifies that 676 records have errors and 127 records do not have errors.
3. Prior to this enhancement, the Data Load Preview would inaccurately indicate that 127 records would be successfully updated. With this enhancement, the Data Load Preview clearly indicates that no records will be updated. Also, an error message indicates that the file cannot be loaded and processed because the error threshold is exceeded.

Implementation

This functionality is automatically enabled for all organizations using the Data Load Wizard.

End of IE9 Support (October '17 Release)

In order to keep up with browser security requirements and the latest software enhancements, Cornerstone will discontinue support for Microsoft Internet Explorer (IE) 9 with the October 2017 release. Please reach out to your IT department and make plans to convert to one of the compatible browsers prior to October 2017.

Universal Profile Navigation Tabs Redesign

Universal Profile Navigation Tabs Redesign

With this enhancement, some elements of the Universal Profile pages are redesigned, including the navigation tabs, the breadcrumbs, and the page titles and descriptions. This provides a consistent experience across all Universal Profile pages and enables users to more easily navigate between Universal Profile pages when accessing them from a mobile device.

The following pages are impacted by this enhancement:

UNIVERSAL PROFILE SECTION	PAGE NAME
Actions	Actions
	Requests
Bio	About
	Resume
	Career Preferences
	Onboarding
	Following
	Postings Created
	Connections
Feedback	Feedback
Snapshot	Snapshot
	Goals
	Reviews
	Development Plans
	Succession
	Competency Ratings
	Documents
	Badges
Transcript	Transcript
User Record	User Record

Use Cases

Julie is a Sales Associate at Acme Corporation, and she uses the Cornerstone system to view the profile of her co-workers when she wants to know more about them.

When she tries to view the Universal Profile pages on her mobile device, she has trouble navigation between pages because the Universal Profile navigation tabs are not designed for a mobile device.

With this enhancement, the new design of the Universal Profile navigation tabs enables Julie to easily navigate between Universal Profile pages on her mobile device.

Considerations

Prior to this enhancement, it was possible for a client to implement a custom footer in which the custom footer style sheet could influence the appearance of the page beyond the footer. With this enhancement, any custom footer style sheets that previously influenced the appearance of the page beyond the footer no longer do so for the pages that are impacted by this enhancement, as listed above.

The content on each of the affected pages is not impacted by this enhancement. For example, the navigation tabs on the Actions page is enhanced. However, the content on the Actions and Requests tabs is not impacted by this enhancement.

The Options drop-down and the My Team drop-down are not impacted by this enhancement.

The Bio - Volunteer page is not impacted by this enhancement.

Implementation

This functionality is automatically enabled for all organizations. All users are impacted by this enhancement.

Universal Profile Navigation

When viewing a page within the Universal Profile, the Universal Profile navigation is moved from the left side of the page to the top of the page. For Universal Profile pages that have multiple tabs, such as the Bio page and the Actions page, the tabs now appear directly within the navigation so that the administrator can quickly navigate to specific tabs within the page.

The screenshot displays a user profile for Charles Cook. At the top, a navigation bar includes the user's name and a set of tabs: Bio (selected), Feedback, Transcript, Actions, Snapshot, and User Record. Below the navigation, a breadcrumb trail shows the path: Home > Charles Cook > Bio. The main content area features a profile picture of Charles Cook, his name, and his title: Cornerstone Administration Division Chief Executive Officer. To the right of the profile information are buttons for 'Connection Pending...' and 'Followed', along with connection statistics: 0 CONNECTIONS, 0 MUTUAL, and 1 FOLLOWERS. Below the profile picture are three tabs: About, Resume, and Career Preferences. The 'About' tab is active, showing contact details: Direct Phone, Mobile Phone, Email (deadbox@cyberu.com), and Location (San Jose). To the right of the contact information is a map placeholder for the user's address, with the Google logo and 'Map data ©2017' visible. At the bottom of the page, a 'Summary' section is partially visible.

Universal Profile Page Title and Breadcrumbs

When viewing a page within the Universal Profile, the Universal Profile page titles, page descriptions, and breadcrumbs are updated to be more responsive when viewing the pages from a mobile device.

Within the breadcrumbs, the Home icon is updated, and the appearance of the breadcrumbs is updated. In addition, when viewing a Universal Profile page on a mobile device, the breadcrumbs will wrap to the next line, if necessary. The Home icon is always displayed. In addition, the first page in the breadcrumbs and the final two pages in the breadcrumbs are displayed.



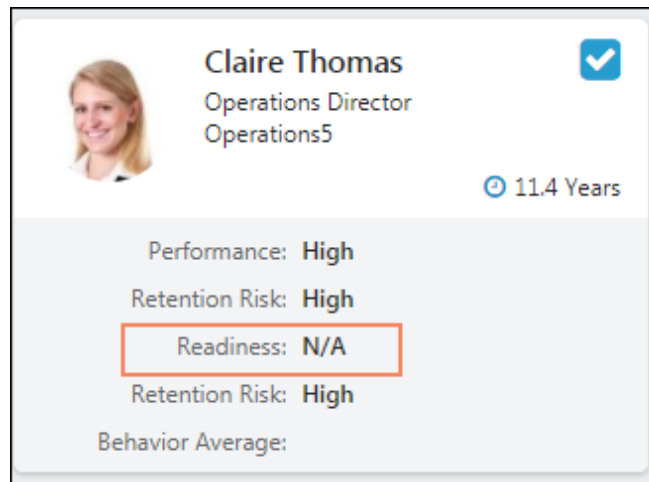
View People - Custom Field Availability Fix

With this enhancement, availability rules will be respected by Succession, OU and User Record custom fields in View People. The custom fields that display in filters, the **Color By** drop-down, and on the large view of the user cards will be based on a user's availability to view the field and its value. If a user at any point does not meet the availability criteria for a custom field, then the field and value will not appear.

Prior to this enhancement, availability rules were only partially respected within View People.

Considerations

- In the event that the administrator has configured the large card with a custom field that you do not have availability to view, "N/A" will display as the value.



- In the event that the administrator has configured the filter drawer with a custom field that you do not have availability to view, the field is not displayed as an option. This also applies to the **Color By** drop-down.

Implementation

This functionality is automatically enabled for all organizations using View People.

Security

The following existing permissions apply to this enhancement:

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

View	Subordinates, and User's Subordinates.	
------	--	--

Cornerstone HR

Configurable Field Validations

Cornerstone HR - Configurable Field Validations

Prior to this enhancement, organizations using Cornerstone HR could not control the format in which data was entered in Short Text Box or Scrolling Text Box type user record custom fields. Users could enter information in many different formats, and invalid information was entered into the system. This made it difficult for organizations to report on certain fields because formats could vary greatly.

With this enhancement, organizations using Cornerstone HR can now control the format in which data is entered in Short Text Box or Scrolling Text Box type user record custom fields. This enables organizations to ensure better data quality and consistency across the organization, which in turn gives organizations more confidence to allow end users and managers to enter user information for themselves.

When field validations are configured, the validations are enforced in all locations where User Record custom fields can be edited. User Record custom fields can appear and be edited in the following areas of the system:

- User Record
- Forms
- My Account
- Self Registration
- Data Load Wizard

This functionality is only available to organizations using Cornerstone HR.

Use Cases

1. For each user at Acme Corp, the organization captures the user's account number for a 3rd party system in a user record custom field.
2. In the past, the account numbers were entered in multiple formats where some administrators used dashes between groups of numbers, some used forward slashes, and some used spaces. This made it very difficult to report on the information and to feed the information into other systems.
3. With this enhancement, the organization can configure validations for the field to ensure that each administrator is entering this information in a consistent manner. In addition, this gives the organization the confidence to allow end users to enter their own account numbers, which reduces the amount of work that is required of administrators. Ultimately, this allows the organization to seamlessly feed the information into other systems.

Data Preparation

Configurable field validations are only applied to data that is entered after the custom field validations are applied. Existing data that was entered prior to configuring the field validations is not validated until the existing data is edited.

Cornerstone recommends that organizations use configurable field validations with custom fields that are created following this enhancement. This ensures that all data within the custom field complies with the format defined for that field. However, if an organization wishes to configure field validations for existing user record custom fields, it is best practice to review and clean up all data within the existing custom field BEFORE configuring a validation. The easiest way to ensure all user data for a single field is in the correct format prior to implementing a validation is to extract user data through a report, correctly format all user data for that field, and then upload the correctly formatted data through the Data Load Wizard. After this exercise is complete and all user data for that field is of the same format, then it is safe to configure a field validation.

Considerations

If an organization has a data feed for user record information, then if the organization implements or changes a field validation and any user data in the feed does not pass the validation for the field, then the data feed will not feed any data into the system. Therefore, it is very important that organizations review and clean up all existing data in a user record custom field if a field validation is being added to the field.

Configurable field validations are only available for User Record custom fields that are of the type short text box and scrolling text box.

If a user record custom field with field validations is included in the self-registration process or in My Account, the format example is not displayed.

Implementation

This functionality is automatically enabled for all organizations using Cornerstone HR.

This functionality is only available to organizations using Cornerstone HR.

Upon release, the User Record Custom Field Configurable Validations - Manage permission is automatically granted to the default system administrator security role.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Record Custom Field Configurable Validations - Manage	Grants ability to manage the configurable validations for user record custom fields within Custom Field Administration. This permission cannot be constrained. This is an administrator permission. This permission is only available to organizations that are using Cornerstone HR.	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
-----------------	------------------------	----------

<p>Self-Registration and User Record Custom Fields - Manage</p>	<p>Grants access to manage custom fields for user Self Registration and the user record in Custom Field Administration. This permission can be constrained by OU and User's OU. This is an administrator permission.</p>	<p>Core Administration</p>
<p>Universal Profile - User Record - Edit Users</p>	<p>Grants ability to edit user records in the system. The administrator must have additional permissions to edit specific fields on the user record. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission. Note: <i>This permission DOES NOT grant the ability to view user records in the system. Administrators must have the Universal Profile - User Record - View Users permission in order to view user records.</i></p>	<p>Core Administration</p>
<p>Users - Edit Custom Field Information</p>	<p>Grants ability to view and edit the custom fields on a user record. Administrators are only able to edit a custom field on a user's user record if the user is within their permission constraints and the administrator is within the availability of the custom field. This permission works in conjunction with the Users - View permission. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.</p>	<p>Core Administration</p>

Custom Field - Configure Field Validations

When creating or editing a Short Text Box or Scrolling Text Box type user record custom field, administrators with the appropriate permissions can now configure validations for the custom field to ensure that data is entered into the custom field in the proper format.

When field validations are configured, the validations are enforced in all locations where User Record custom fields can be edited. User Record custom fields can appear and be edited in the following areas of the system:

- User Record
- Forms
- My Account - **Note:** *If the custom field is included in My Account, the format example is not displayed.*
- Self Registration - **Note:** *If the custom field is included in the self-registration process, the format example is not displayed.*
- Data Load Wizard

This functionality is only available to organizations using Cornerstone HR.

To view and manage user record custom fields, go to **ADMIN > TOOLS > CORE FUNCTIONS > CUSTOM FIELD ADMINISTRATION**. Then, select the User Record tab on the left side of the page.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Self-Registration and User Record Custom Fields - Manage	Grants access to manage custom fields for user Self Registration and the user record in Custom Field Administration. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration
User Record Custom Field Configurable Validations - Manage	Grants ability to manage the configurable validations for user record custom fields within Custom Field Administration. This permission cannot be constrained. This is an administrator permission. This permission is only available to organizations that are using Cornerstone HR.	Core Administration

- Application
- Compensation
- Development Plans
- Offer Letter
- Organizational Units
- Performance Reviews
- SF-182
- Succession
- Training
- Training Request Forms
- Transaction
- User Record**
- Vendor

Define Field

Define the field name, field type, field availability and additional field properties below. If availability is not defined the custom field is not visible to anyone.

Name:

Category:

Email Tag:

Type:

Active:

All Users: If unchecked, this field will only appear on the records of users added via a self-registration group. If checked, this field will appear on the records of all users, regardless of how they are added to the portal.

Read Only:

CONFIGURE FIELD VALIDATION

Field validations allow you to define the format for a custom field. To configure a validation for this custom field, enter a valid regular expression in the regex pattern, a format example to help guide the user entering information, and an error message to display when data is not entered in the defined format.

Regex Pattern:

Enter the regular expression (regex) that defines the data format you want your user to enter. If left blank, no formatting will be enforced.

Format Example:

(Max 250 characters) Enter an example of the correct format. This will display below the field when entering data. For a U.S. phone number, this may be "Example: (123) 456-7890".

Error Message:

(Max 250 characters) Enter text that will display as an error message to help guide your user to enter correctly formatted data.

AVAILABILITY

Configure Field Validation

This section is only available when creating or editing short text box or scrolling text box user record custom fields. This section is only available to organizations using Cornerstone HR, and it is only available if the administrator has permission to manage user record custom field validations.

This section enables administrators to define a required format for the custom field. When a required format is defined, any data entered into the custom field must match the required format. This enables organizations to ensure that data is entered into the custom field in the proper format. The required format is defined using a Regex Pattern.

Enter the following information for the field:

- **Regex Pattern** - Enter the regular expression that defines the format in which data must be entered in the field. If no regex pattern is entered, then the system does not enforce any additional field validations. The character limit for this field is 4,000. When the custom field is saved, the system validates that the regex pattern is a valid expression. *See the **Regex Assistance** section for resources to assist in writing regex expressions.*
Note: *Cornerstone Global Product Support does not troubleshoot regex issues.*
- **Format Example** - Enter text to explain or demonstrate the correct format for the field so that users who complete the field understand the proper way to enter information in the field. This text will appear below the user record custom field when a user is completing the field. The character limit for this field is 250. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages. **Note:** *If the custom field is included in the self-registration process or in My Account, the format example is not displayed.*
- **Error Message** - Enter an error message that will display when a user does not enter data in the correct format. This message should help guide the user to correctly enter the data. The character limit for this field is 250. If multiple languages are enabled for your portal, click the Translate icon to translate the field into other available languages.

If a valid Regex Pattern is entered, then the Format Example and Error Message are required.

Regex Assistance

The resources in this section may be used to learn about writing regular expressions, find common regular expressions, and test your regular expressions.

Education / Getting Started

The following resources may help you learn how to write your own regular expressions:

- Microsoft - <https://docs.microsoft.com/en-us/dotnet/standard/base-types/regular-expressions>
- RegExr - <http://regexr.com/>

Common Expressions

The following resource allows you to search for common regular expressions that have already been defined for you:

- RegExLib (Regular Expression Library) - <http://www.regexlib.com/>

Regular Expression Validator

The following resource helps you validate your regular expression before implementing it in the system:

- Regular Expressions 101 - <https://regex101.com/>

User Record Custom Field Validations

Administrators can configure a required format for a short text box or a scrolling text box user record custom field. When completing a user record custom field that has a required format, an example of the proper format is displayed below the field to help you understand how data should be entered in the field. In addition, if you enter data improperly, an error message is displayed.

The format example and the error message are configured by the administrator when the custom field is created or edited in custom field administration.

This functionality is only available to organizations using Cornerstone HR.

Example of Proper Format

User Record Custom Field ▼

<p>Custom User ID: <input type="text"/></p> <p>Account Number: <input style="border: 2px solid red;" type="text"/> <small>Example: XX-00-11-22-33-44-55-66-77-88-99</small></p> <p>Transfer Date: <input type="text"/> </p>	<p>Telephone Number: <input type="text"/></p> <p>Incidents: <input type="text"/></p> <p>Date of Birth: <input type="text" value="4/10/1987"/> </p>
---	--

Error Message

User Record Custom Field ▼

<p>Custom User ID: <input type="text"/></p> <p>Account Number: <input style="border: 2px solid red;" type="text" value="55-44-33-22-11"/> <small>* You must enter two letters followed by 20 characters with dashes after every pair of characters. Example: XX-00-11-22-33-44-55-66-77-88-99</small></p> <p>Transfer Date: <input type="text"/> </p>	<p>Telephone Number: <input type="text"/></p> <p>Incidents: <input type="text"/></p> <p>Date of Birth: <input type="text" value="4/10/1987"/> </p>
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Time and Attendance Integration - Kronos

With the February 2017 release, the Kronos Time and Attendance integration was made available via the Edge Marketplace, and this integration enabled users to use Single Sign On (SSO) to log in to Kronos from the Cornerstone HR system.

With this release, basic user profile information is now synchronized from the Cornerstone HR system to Kronos user profiles. When a new user is added to the Cornerstone HR system, the user will automatically be added to the organization's Kronos system as well. In addition, when an existing user is updated in the Cornerstone HR system, the user's profile is updated in the organization's Kronos system.

This functionality is only available to organizations using Cornerstone HR.

Note: *This functionality will be released with the September 22 post-release patch.*

Error Handling

If the Kronos integration is enabled and an error occurs when the Cornerstone HR system submits a user record to the Kronos system for synchronization, then the Cornerstone HR system generates an email to the Kronos integration email address. This email contains the error messages that were indicated by Kronos. The email address to which these error emails are sent is the email address that is configured to receive messages in the event of sync failures.

Considerations

Cornerstone HR does not share any Sensitive Personally Identifiable Information (SPII) with Kronos.

Custom fields on the user record are not currently shared with Kronos.

The system begins syncing users after the integration is enabled. Any existing Cornerstone HR users must be added in bulk via the Kronos solution.

The integration does not sync from Kronos to Cornerstone HR, meaning that if a user is added or updated in Kronos, these users are not added or updated in Cornerstone HR.

Implementation

The Kronos integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This functionality is only available to organizations using Cornerstone HR. Organizations must also have a Kronos account.

Note: *This functionality will be released with the September 22 post-release patch.*

Security

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
Universal Profile - User Record - Create Users	Grants ability to access the User Record Administration page and to create new users in the system. When creating a new user, this permission grants the ability to add general information, which includes first name, last name, username, assigned OUs, and custom relationships. The administrator must have additional permissions to add any additional fields. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Users - Edit General Information	Grants ability to edit the general fields on a user record, including first name, last name, username, assigned OUs, and custom relationships. This permission works in conjunction with the Users - View permission. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Edge

Cornerstone REST API - Enhancements - Overview

Prior to this enhancement, it was not possible to report on applicant custom field data or previous applicant status via the Cornerstone API.

With this enhancement, the following updates are made to services within the Cornerstone API:

- Job Applicant API - The job applicant service can return custom fields when a request is made to the API based on the job requisition ID or the candidate ID. The response also contains candidates' previous statuses. The maximum number of fields that can be returned per applicant is 100. With this enhancement, in addition to Job Requisition ID and Applicant ID, email addresses can also be used as a query parameter for the service.
- Job Requisition API - The job requisition service includes a language parameter in the request, which is used to specify the language of the results. The service also allows administrators to capture the date that records were last modified and search for records that were last modified within a specified date range.
- Format Type Header Enhancements - To return results in JSON/XML, content-type can now be specified within the HTTP headers instead of within the path query string. This is in line with standard REST protocols. Clients will have the option to specify the content-type in the HTTP headers or as the format parameter within the query string.
 - For existing users of these services, the format parameter specified in the query string will supercede the setting in the HTTP header, ensuring continuity of service with the current August '17 Release.
 - **October '17 Release Impact:** The ability to specify the format parameter in the query string will be deprecated in the October '17 Release. Please ensure that your teams update the web service requests to use the "content-type" parameter in the HTTP header before the October '17 Release (10/27/2017) to maintain uninterrupted service.
 - Code samples for this change will be provided in the API Explorer section of Cornerstone Edge by the August '17 Release.
- GetOU Service enhancement - The parent organizational unit (OU) ID is included in the response when the OU service is queried.

With these updates, the Cornerstone API functionality across multiple services is improved to provide users with more details in API responses.

Implementation

This functionality is automatically enabled for the Cornerstone API, available through the Edge platform.

Permissions

The following 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

Format Parameter Deprecation in October '17 Release

In the October '17 Release, the ability to specify the format parameter in the query string will be deprecated in the October 2017 Release. Please ensure that your teams update the web service requests to use the "content-type" parameter in the HTTP header before the October '17 Release (10/27/2017) to maintain uninterrupted service.

Implementation

This functionality is automatically enabled for the Cornerstone API, available through the Edge platform.

Open Access to API Explorer - Overview

The API Explorer allows administrators to access documentation for Edge APIs directly from the Edge portal.

Prior to this enhancement, the API Explorer was only accessible to users with access to a Cornerstone portal with Edge enabled, meaning potential Edge clients were unable to explore documentation and gain a better understanding of Edge APIs.

With this enhancement, the API Explorer is publicly available and can be accessed both by current Cornerstone clients and by outside users.

Considerations

- No permissions or backend settings are needed to access the API Explorer. Any user can access the API Explorer via a URL.
- The documentation accessible via the publicly available API Explorer is generic and hides any custom fields from anonymous users.

Implementation

This functionality is automatically accessible to all users, including users without access to a Cornerstone portal.

Access

To access the API Explorer independently of a Cornerstone portal, go to:
<https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/>

Generic documentation for existing Edge APIs is available from this URL. From the publicly accessible API Explorer page, users with access to an Edge portal can log into their Edge accounts, which redirects them to the Edge Marketplace, provided they have the associated permission. If an anonymous user attempts to try or purchase an API, they are directed to the Edge login screen and prompted to log in.

The screenshot displays the Edge API Explorer interface. At the top left is the Edge logo and a hamburger menu icon. The top right shows the user name 'Lindsey Pauley'. A left-hand navigation pane contains a dropdown menu for 'Cornerstone ...', a list of menu items including 'Overview', 'Authentication', 'Request', 'Response', and 'Error', a search bar, and sections for 'Recruiting' and 'Learning'. The main content area is titled 'Overview' and contains a text box stating: 'Cornerstone's API was designed to simplify how you can connect between your integration and our system. With ease in mind, we've developed our API based on the REST protocol.' Below this is the 'Authentication' section, which includes an 'Overview' subsection explaining that requests require digital signatures and a paragraph detailing the signature verification process. At the bottom, an 'Authentication Dataflow' diagram shows three components: 'Service Consumer' (green), 'CSOD API Service' (blue), and 'Secure Token Service' (purple), connected by a horizontal line. A blue question mark icon is located in the bottom right corner of the diagram area.

For more information about the Edge API Explorer, [See Edge - API Explorer](#).

Recruiting Integrations in Edge - August '17 Release

The following Recruiting integrations are available in Edge with the August '17 release:

- Accurate Background Check - See **Accurate Background Check Integration Enhancements** on page 413 *for additional information.*
- IBM Assessment - See **IBM Assessment Integration Overview** on page 476 *for additional information.*
- Quest Diagnostics Drug Screening - See **Quest Diagnostics Drug Screening Integration Overview** on page 509 *for additional information.*
- SmashFly - See **SmashFly Integration Overview** on page 531 *for additional information.*

Engage

Campaign Status Enhancements

Campaign Status Enhancements - Overview

Prior to this enhancement, Engage administrators were able to manage the system's feedback campaigns, but it was not possible to delete draft campaigns, view the details of a closed campaign, or easily view and manage campaigns in a Scheduled status.

With this enhancement, Engage administrators can do the following:

- Quickly view and manage campaigns that are in the queue and ready to launch
- Review the details of closed campaigns, which helps design follow-up campaigns
- Delete draft campaigns, which prevents unneeded campaigns from cluttering the Engage Library

Implementation

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

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Manage Scheduled Campaign

If an Engage campaign has been launched but has not yet reached its start date, it is in a status of Scheduled. Prior to the start date, administrators can continue to make edits to the scheduled campaign if necessary.

To make edits to an Engage campaign, go to **ANALYTICS > ENGAGE** and then click the **ENGAGE ADMIN DASHBOARD** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

2016 Annual Company-wide Satisfaction Survey

Owner: CSOD

Type: Satisfaction

Distribution: Email

Invited Participants: 300

Completion Rate: 0%

Recurring: Quarterly



Scheduled



Start Date: Dec 31, 2015
Close Date: Dec 29, 2016

[Edit Campaign](#)

Edit Campaign

To edit a scheduled campaign, click the **EDIT CAMPAIGN** button in the bottom right of the campaign's tile in the Active Campaigns section on the Engage Admin Dashboard. Clicking the Edit Campaign button for a scheduled campaign triggers a warning message that says, "This campaign has been scheduled, are you sure you want to make changes?" To exit the warning without making changes to the campaign, click the **CANCEL** button. To continue editing the campaign, click the **EDIT** button.

You can advance through the five steps of the campaign setup process and make any needed changes. The same fields which can be edited for active campaigns can be edited for scheduled campaigns, which include the following:

- Campaign Name
- Internal Description
- Availability

- Campaign Frequency
- Close Date
- Invitation/Reminder From
- Invitation/Reminder Subject
- Invitation/Reminder Body

If more substantial changes are required, it is recommended that you recall the campaign and create a new campaign. After reaching the Review Campaign step, you can click the **RE-LAUNCH SURVEY** button to apply your changes to the campaign. The option to save the campaign as a draft is NOT available for scheduled campaigns.

Recall Campaign

To recall a scheduled campaign, click the action drop-down menu in the bottom right of the campaign's tile in the Active Campaigns section on the Engage Admin Dashboard. Then, select the **Recall Campaign** option. This triggers a warning message that says, "Warning: This campaign will be canceled and its status changed to Draft. Are you sure?" Click the **CONFIRM** button to recall the campaign and revert the campaign to a draft. Click the **CANCEL** button to close out of the warning without recalling the campaign.

Delete Draft Campaign

Administrators are able to delete draft campaigns that they are no longer planning on using, via the Engage Admin Console page.

To access the Engage Admin Console, go to **ANALYTICS > ENGAGE** and click the **ENGAGE ADMIN CONSOLE** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Delete Draft Campaign

Only draft campaigns which have not yet been scheduled can be deleted from the Engage library. To delete a draft campaign, find the campaign on the Engage Admin Console page and click the **Options** drop-down menu for the campaign. Then, click the **Delete** option.

A warning message appears with text that reads, "Warning: This campaign will be permanently deleted. Are you sure?" Click **CONFIRM** to finalize the deletion of the campaign. Click the **CANCEL** button to cancel the deletion without affecting the campaign draft. Once the campaign has been deleted, it is removed from all areas of the Engage module.

- **Campaign** - The campaign title
- **Survey** - The survey selected for the campaign
- **Privacy** - Displays whether or not the survey responses are confidential
- **Campaign Type** - The type of campaign (Satisfaction, Engagement, Commitment)
- **Distribution** - The method of survey distribution (email link, action item, or mobile)
- **Distribution Filters** - The user criteria selected for survey recipients
- **Launch Date** - The date the campaign was launched to users
- **Close Date** - The date the campaign ended
- **Recurring** - Displays whether or not recurrence is enabled for the campaign
- **Invitations** - Displays the text of campaign Invitations (when applicable)
- **Reminders** - Displays the text of campaign Reminders (when applicable)
- **Invited Participants** - The number of users who were invited to provide feedback for the campaign survey
- **Completion Rate** - The percentage of invited users who completed the survey

To return to the Engage Admin Dashboard after reviewing the campaign details, click the **BACK** button.

Engage Actions

Engage Actions - Overview

Prior to this enhancement, Engage administrators could distribute survey campaigns either via an email link or using the Mobile dashboard.

With this enhancement, in addition to the email link and mobile distribution methods, Engage administrators can also distribute surveys via the Actions page of users' Universal Profiles.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Campaign Distribution

The General step of the campaign creation process allows you to input basic information about the campaign and select how the survey will be distributed to users. With this enhancement, Engage administrators can distribute surveys to users via the Actions page of their Universal Profiles.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

CREATE CAMPAIGN

- General**
- Survey
- Invitation
- Launch

Manage Campaign

General Settings

Campaign Name

Internal Description ?

Privacy ?

Campaign Type

Campaign Distribution Email link Mobile Action Item

Availability ↗

Launch Date 📅 ⌚

Campaign Frequency Recurring

Close Date 📅 ⌚

Campaign Distribution

To distribute the survey via the Actions page of users' Universal Profiles, check the **Action Item** option available for the **Campaign Distribution** field. Then, continue configuring the campaign as desired. **Note:** *Multiple distribution methods may be selected simultaneously.* When the campaign is launched and active, the survey will appear to users on the Actions page of their Universal Profile.

See **Create Campaign - Overview** on page 267 for additional information.

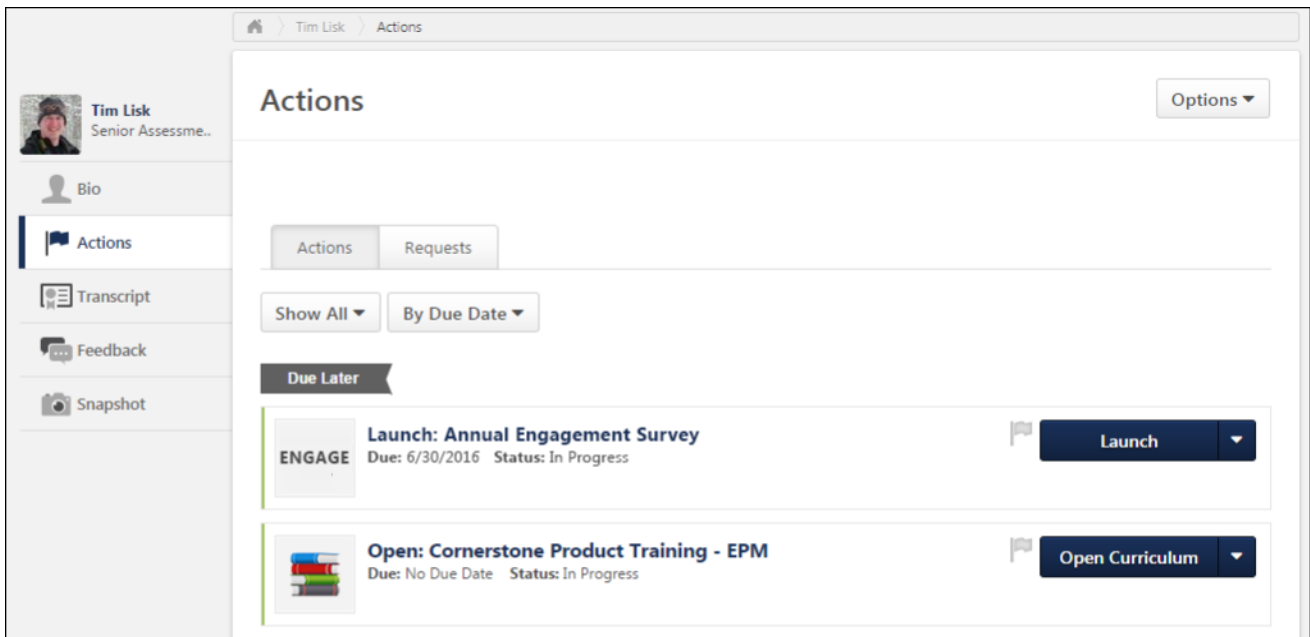
Engage - Universal Profile Actions

If an Engage administrator has configured a feedback campaign to be distributed as an action item, and the campaign has been launched, the survey displays to users as an action item on the Actions page of Universal profile.

To access the Universal Profile, go to **HOME > UNIVERSAL PROFILE**. Then, click the Actions tab to navigate to the Actions page of Universal Profile.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage



Filter

Using the Action Type drop-down menu that displays above the user's available action items, users can filter the Actions page for only Engage surveys. To view only available Engage surveys on the Actions page, click the **Action Type** drop-down menu and click the **Engage Survey** filter. The page will refresh to display only Engage surveys in which the user has been invited to participate. **Note:** *The user must have the permission to receive Engage survey invitations in order for Engage surveys to display on the Actions page of Universal Profile.*

Launch Engage Survey

If a user has been invited to participate in an Engage survey as an action item, when the user navigates to the Actions page of their Universal Profile, the survey displays as an available action item, along with the following information and options:

- **Engage Survey icon** - The system image icon for Engage surveys appears to the left of Engage survey action items to denote the action item type.
- **Title** - This field displays the title of the Engage survey.
- **Due Date** - This field displays the date the survey completion is due.
- **Status** - This field displays the current status of the survey. Possible statuses include:
 - In Progress
- **Actions** - Using the Actions drop-down menu, users can perform the following actions for Engage surveys, depending on the current status of the survey:
 - **Launch** - Click **Launch** to open and complete the survey in a new browser window.

Note: *The user must have the permission to receive Engage survey invitations in order for Engage surveys to display on the Actions page of Universal Profile.*

Considerations

- A campaign that is scheduled but not launched does not appear as an action item for users in Universal Profile.
- In the case of a recurring campaign, only the current campaign recurrence displays on a user's Actions page.
- When a campaign (or campaign recurrence) ends, the action item is removed from a user's Actions page.
- When a user completes a survey via an email link or the mobile dashboard, if the survey was distributed via multiple methods, the action item is also rendered complete and removed from the user's Actions page.
- When a user completes a survey via the Actions page, they no longer receive reminders via other distribution channels if the survey was distributed via multiple methods.

Engage Filter and Reporting Enhancements

Engage Filter and Reporting Enhancements - Overview

Prior to this enhancement, Engage administrators had access to a wide range of survey data gathered through the Engage platform, but compiling the data in a meaningful way sometimes required multiple steps.

With this enhancement, the Engage Dashboard features improved filtering and reporting functionality, which makes it easier to extract meaningful data collections from employee feedback. Enhancements to the Engage Dashboard include:

- The ability to filter report results and distribute surveys by employee tenure
- The ability to easily navigate up and down the company hierarchy in the heat map
- The auto-removal of connective words from word cloud charts, such as "the," "of," and "and"
- The ability to view paginated question and driver tables

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

Employee Tenure Filter

The Engage Dashboard displays a high-level view of the results of your Satisfaction, Engagement, and Commitment campaigns. Numerous filters are available for use with the data charts that display on the Engage Dashboard, and with this enhancement, a filter for employee tenure is available. The Tenure filter allows administrators and managers to distribute survey results according to tenured employees and view feedback from employees with a large amount of experience at the company.

The Tenure filter is also available when configuring availability for the campaign during the creation process. This allows administrators to only distribute certain surveys to employees who have been working at the company for a specific amount of time, such as at least three years.

To access the Engage Dashboard, go to **ANALYTICS > ENGAGE**.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

The screenshot displays the 'Tenure' filter selection interface. At the top, there is a horizontal toggle bar with markers for 90d and 1y, and a green segment between them. Below the bar, the 'MINIMUM DAYS' field contains '99' and the 'MAXIMUM DAYS' field contains '330'. At the bottom of the interface are 'Cancel' and 'Submit' buttons. The background shows the Engage Dashboard with a '100% Complete' status and navigation tabs for Succession, Admin, Certifications, Connect, and Analytics.

Engage Dashboard - Select Tenure

On the Engage Dashboard, the data charts for selected campaigns can be filtered by employee tenure. To apply a tenure range to the data sets:

1. Click the **Select Filters** selection box in the upper-left corner of the Engage Dashboard. A Select Filters flyout opens on the left side of the page.
2. Click the Add icon for the Tenure filter.
3. Select a tenure range either using the Tenure toggle bar or by entering a minimum and maximum number of days employed. If using the toggle bar, drag the left marker to the minimum number of days an employee must have been working at the company in order to be included in the data charts. Drag the right marker to the maximum number of days an employee can have been working at the company in order to be included in the data charts.
4. After the tenure range has been selected, click the **SUBMIT** button at the bottom of the flyout. The Tenure range will be applied to the Engage Dashboard charts, and only employees with tenure in that range will be included in the chart data.

Note: *If the campaign is set to recur, tenure is recalculated with each recurrence and the survey is distributed to any user who meets the tenure requirements on that day.*

Create Survey - Tenure Filter

On the General step of the campaign creation process, you can set availability to a specific employee tenure. To set availability to a tenure range:

1. Click the **Select Filters** selection box in the Availability field. A Select Filters flyout opens on the left side of the page.
2. Click the Add icon for the Tenure filter.

3. Select a tenure range either using the Tenure toggle bar or by entering a minimum and maximum number of days employed. If using the toggle bar, drag the left marker to the minimum number of days an employee must have been working at the company in order to receive the survey. Drag the right marker to the maximum number of days an employee can have been working at the company in order to receive the survey.
4. After the tenure range has been selected, click the **SUBMIT** button at the bottom of the flyout. The Tenure range will be applied to the campaign availability, and only employees with tenure in that range will receive the campaign survey.




Heat Map Drill Down

The heat map located on the Engage Dashboard allows administrators and managers to view average satisfaction, engagement, or commitment scores for various organizational units (OUs) and associated demographics. Administrators can drill down through the OUs to view the scores for child OUs.

To access the Engage Dashboard, go to **ANALYTICS > ENGAGE**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

Division	Satisfaction	People	Personal	Organization
 Sales	47.8	47.8	47.8	47.8
North America - Field Sales 	25	25	25	25
North America - Inside Sales 	20	20	20	20

Heat Map

Below the charts, you can view a heat map of different employee groups, such as different divisions or locations, with more specific response data for those groups. For each employee group, the following columns display with data, if available:

- **Demographic name** - The name of the employee group, such as division, location, or all employees.
- **Satisfaction/Engagement/Commitment** - The average satisfaction, engagement, or commitment percentage of the group.
- **People/Personal/Organization** - The average percentage score across driver questions for the team, individual, or organization dimensions. The questions in these dimensions are used to provide more context for Satisfaction/Engagement/Commitment data.

Clicking an organizational unit (OU) allows the administrator to drill down to view child OUs of the parent OU and associated sub scores. Clicking a child division causes the heat map to refresh and display the selected OU as the new parent OU, along with its child OUs and associated scores. Any active filters are retained while navigating the heat map hierarchy.

Driver and Question Table Pagination

On the bottom of the Engage Dashboard, the drivers and questions for the selected campaign type display in separate sections. With this enhancement, the administrator is not limited to viewing only the highest-rated or most-answered questions. The administrator can view more drivers and questions by paging through all available drivers and questions for the campaign.

To access the Driver Details and Question Details sections, go to **ANALYTICS > ENGAGE** and scroll to the bottom of the Engage Dashboard page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

DRIVER DETAILS

<div style="background-color: #333; color: white; padding: 5px; margin-bottom: 5px;">74</div> <p>Can you concentrate on one task for a long time?</p>	<div style="background-color: #333; color: white; padding: 5px; margin-bottom: 5px;">62</div> <p>Do you have a lot of friends among your co-workers?</p>
<div style="background-color: #333; color: white; padding: 5px; margin-bottom: 5px;">61</div> <p>Do you like to give advices?</p>	<div style="background-color: #333; color: white; padding: 5px; margin-bottom: 5px;">55</div> <p>Do you prefer working from home!?</p>
<div style="background-color: #333; color: white; padding: 5px; margin-bottom: 5px;">51</div> <p>Can you work in noisy places?</p>	<div style="background-color: #333; color: white; padding: 5px; margin-bottom: 5px;">50</div> <p>Do you prefer come to the office before 8am?</p>

« « 1 2 3 4 5 » »

19 to 24 of 100

Driver and Question Details

Both the Driver Details section and the Question Details section display all available drivers and questions, respectively. A maximum of six drivers can display at a time in the Driver Details section, and a maximum of six questions can display at a time in the Question Details section. To view specific pages of results, click the page numbers that display in the bottom-right corner of the relevant section. To navigate to the first page of results, click the left-facing double arrow icon. To navigate to the last page of results, click the right-facing double arrow icon. The single arrow icons can be used to page chronologically back and forward through pages of search results.

Drivers are sorted by highest-scoring. Questions are sorted by most-answered.

Word Cloud Filtering

With this enhancement, the word cloud in the Themes section of the Driver Details page filters out connector words. Commonly used articles and conjunctions, such as "of" and "or" are not included in the word cloud even if they are the most commonly used words in users' survey responses.

To access the word cloud for a driver question, go to **ANALYTICS > ENGAGE** and scroll to the bottom of the Engage Dashboard page. Then, click a specific driver question. Scroll to the bottom of the Driver Details page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage



Themes

The Themes section displays a word cloud, which displays the top words used in survey responses. The more times a specific word is used in a response to the question, the larger it appears in the word cloud. For example, if the word "customer" is the largest text size, this indicates that "customer" was the word used most often in survey responses. The word cloud filters out connector words like "the," "and," and "a," so that more illustrative response words are not lost in the cloud.

Engage

Engage - Overview

Prior to this enhancement, it was necessary for administrators to use annual engagement surveys or pulse feedback platforms in order to gather internal employee feedback, and these mechanisms were not integrated across their Unified Talent Management suite.

With the Engage platform, released in June 2017, administrators can create and schedule recurring, continuous feedback campaigns to capture satisfaction and engagement feedback from employees using mobile or web devices. Engage can be used to measure employees on three dimensions: Satisfaction, Engagement, and Commitment, allowing organizations to continue fostering a productive workplace.

[Click here to access the Engage Starter Guide.](#)

Use Cases

Use Case 1

An HR administrator wants to ask employees in the organization how they feel about a range of topics, such as whether they receive regular feedback from their manager, whether they feel safe at the office after regular hours, and whether they are likely to recommend the company to a friend as a great place to work. The admin creates an engagement survey using the Engage Library, and then configures a recurring quarterly survey campaign to collect this feedback.

Use Case 2

An employee wants to be able to provide confidential feedback about the organization, but they don't want to spend thirty minutes completing a survey. They complete a daily allotment of two or three questions using their mobile app in less than ten seconds per day.

Use Case 3

An executive wants to be able to view the satisfaction and engagement scores for their department or team. They want to be able to cut and filter the results by organizational unit (OU) and question category. They also want to be able to view the open ended responses for a specific question.

Implementation

The Engage module is available for purchase, and can be activated in Pilot, Stage, and Production portals upon enablement. It is NOT part of the Performance module. Engage can be purchased independent of other product lines. Please contact Global Product Support for more information and to enable Engage.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage	Limits who can receive an invitation to complete a survey. Useful	Engage

Respondent	for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	
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Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
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View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage
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The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Mobile Preferences	Grants ability to manage Mobile Preferences. This permission cannot be constrained.	Mobile

Engage Dashboard

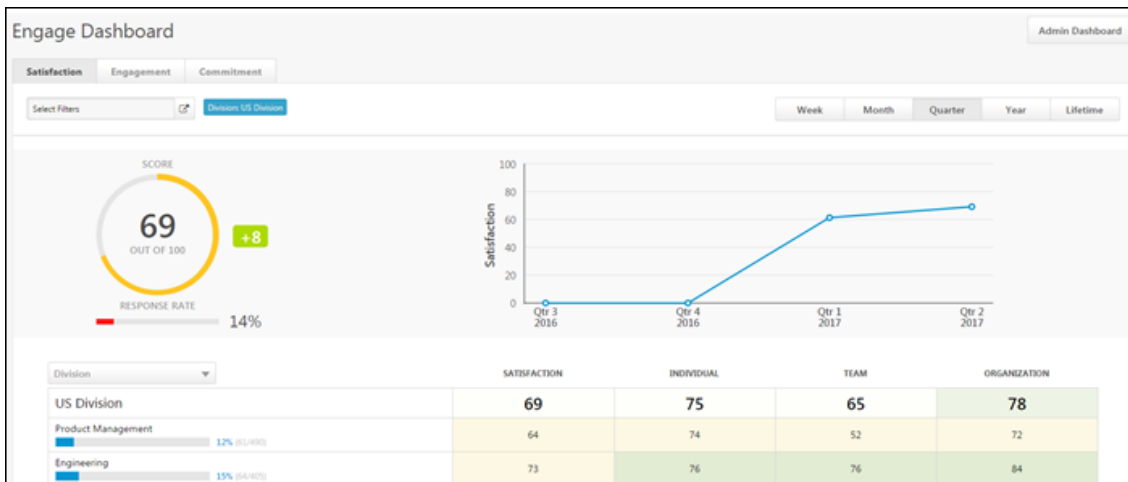
The Engage Dashboard displays a high-level view of the results of your Satisfaction, Engagement, and Commitment campaigns. A campaign is an engagement survey task which is deployed to users at a frequency and for a duration specified by the administrator who created the campaign. The goal of an engagement campaign is to ascertain employees' feelings toward various aspects of the organization, allowing the organization to gather data which can be used to increase retention, performance, and motivation. There are three types of campaigns:

- Satisfaction - Helps gauge employee satisfaction and predict employee retention
- Engagement - Helps gauge employee engagement and predict employee performance
- Commitment - Helps gauge employees' level of commitment to the organization and predict organizational citizenship behavior, which allows organizations to determine which parts of the company go above and beyond their job descriptions.

To access the Engage Dashboard, go to **ANALYTICS > ENGAGE**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage



Admin Dashboard

Click the **ADMIN DASHBOARD** button to navigate to the Engage Admin Dashboard. From this page, you can create and manage specific campaigns. [See Engage Admin Dashboard](#) on page 264 *for additional information*.

Engage Dashboard

The engage dashboard provides the average score, response rate, and overall satisfaction, engagement, or commitment of survey responders over time.

Filters

Using the filters available on the Engage Dashboard, you can filter the report results by campaign type, organizational unit, and time interval:

- **Campaign Type** - Using the tabs at the top of the page, you can filter report results by the following campaign types:
 - Satisfaction - Click this tab to view only data related to Satisfaction campaigns (selected by default).
 - Engagement - Click this tab to view only data related to Engagement campaigns.
 - Commitment - Click this tab to view only data related to Commitment campaigns.
- **Select Filters** - This filter enables you to view survey results for users in a specific division or location. Click the filter drop-down menu and choose a specific division or location from the flyout that appears (all employees selected by default).
- **Time Interval** - Using the tabs above the chart, you can filter report results by the following time intervals:
 - Week
 - Month
 - Quarter (selected by default)
 - Year
 - Lifetime

Charts

The charts on the Engage Dashboard provide a graphical representation of the following data for your selected campaign type, OU criteria, and time interval:

- **Score Wheel** - This is the average score for all of the selected campaign type's surveys over the selected time period. For example, if you have selected the Satisfaction tab and left the OU criteria set to all employees, and the Score chart shows a score of 78%, your organization's total average employee satisfaction for all time is 78%.
- **Response Rate** - This bar graph displays what percentage of users invited to respond to the campaign's survey actually provided a response.
- **Satisfaction/Engagement/Commitment Over Time** - This graph displays employees' average satisfaction, engagement, or commitment over time, depending on which campaign type you have selected. For example, if you select the Engagement campaign type, leave OU criteria set to all employees, and select the Monthly tab, you can view the average employee engagement for each of the last 12 months.

Response Demographics

Below the charts, you can view a breakdown of different employee groups, such as different divisions or locations, with more specific response data for those groups. For each employee group, the following columns display with data, if available:

- **Demographic name** - The name of the employee group, such as division, location, or all employees
- **Satisfaction/Engagement/Commitment** - The average satisfaction, engagement, or commitment percentage of the group
- **Individual/Team/Organization** - The average percentage score across driver questions for the individual, team, or organization dimensions. The questions in these dimensions are used to provide more context for Satisfaction/Engagement/Commitment data. These scores are not included in the overall score wheel calculation but can help identify outliers and major issues within the organization.

Drivers

On the bottom of the Engage Dashboard, the highest rated drivers for the selected campaign type display. Drivers are the questions that strongly impact the overall score in the Score Wheel. Driver scores can range from -100 to +100, and affect the strength of the Score Wheel percentage. Engage uses a Kendal rank correlation coefficient, also known as Kendall's tau coefficient, to calculate the driver score, which can be interpreted as a correlation. Examples:

- A driver score of +100 indicates a perfect positive correlation. As responses to that driver question rise, so does the overall score. The driver and overall score rise and fall together.
- A driver score of -100 indicates a perfect negative correlation. As responses to that driver question rise, the overall score falls. The driver and overall score rise and fall in opposition to one another.
- A driver score of 0 indicates there is no correlation between that driver question and the overall score. An employee's response to the driver question has no relation to their satisfaction, for example.

To improve the organization's Satisfaction score, focusing on strong drivers (those closest to plus or minus 100) that represent the issues most likely to impact the overall score is recommended. Questions with a low driver score (close to 0) are still worth reviewing, and depending on your company strategy, may warrant a place in action planning. However, initiatives related to weak drivers are less likely to change the overall Satisfaction score.

Clicking on a driver navigates you to the Driver Details page for the driver, allowing you to analyze the driver in greater detail. [See Driver Details](#) on page 261 *for additional information*.

Driver Details

The Driver Details page provides additional insight into specific driver questions and allows you to view a breakdown of responses and a word cloud which visually represents common response topics.

To access the Driver Details page, go to **ANALYTICS > ENGAGE** and scroll to the bottom of the Engage Dashboard page. Then, click a specific driver question.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

Driver Details

Question DRIVER STRENGTH

Can you work in noisy places? 49

Question Comparison

2017 average score: 58/100

Response Choice	Percentage
Strongly Disagree	5%
Disagree	20%
Neutral	31%
Agree	22%
Strongly Agree	22%

Legend

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

Recent Responses

Test test	Answer
01/30/2017	01/30/2017
Following independence, Ukraine declared itself a neutral state.[15] Nonetheless it formed a limited military partnership with the Russian	The territory of modern Ukraine has been inhabited since 32,000 BC. During the Middle Ages, the area was a key centre of East Slavic culture,
01/30/2017	01/30/2017
Ukraine is a unitary republic under a semi-presidential system with separate powers: legislative, executive, and judicial branches. Its capital	Ukraine has long been a global breadbasket because of its extensive, fertile farmlands, and it remains one of the world's largest grain
01/30/2017	01/30/2017

[Show all 16 Responses](#)

Themes

[Back](#)

Question

The Question section at the top of the Driver Details page displays the driver question, along with the Driver Strength, which displays to the left of the question. The Driver Strength is used to determine the driver's overall impact on the organization's average satisfaction, engagement, or commitment score.

Question Comparison

The Question Comparison section displays the average question score for the current time period, along with a color-coded chart which graphically represents the response distribution. Each segment of the chart displays the percentage of users who chose each response choice. The response key below the chart indicates which response corresponds with each chart color.

Recent Responses

The Recent Responses section shows six anonymized question responses, organized by most recent. Each response includes the date the response was received. To view more responses, click the page numbers.

Themes

The Themes section displays a word cloud, which displays the top words used in survey responses. The more times a specific word is used in a response to the question, the larger it appears in the word cloud. For example, if the word "customer" is the largest text size, this indicates that "customer" was the word used most often in survey responses.

Back

To return to the Engage Dashboard, click the **BACK** button. See **Engage Dashboard** on page 258 *for additional information*.

Create New Campaign

To create a new feedback campaign, click the **CREATE NEW CAMPAIGN** button. You will be directed to the four-step campaign creation process. For more information about creating a campaign, [See **Create Campaign - Overview** on page 267 for additional information.](#)

Engage Library

To access the Engage Library, click the **ENGAGE LIBRARY** button. From the Engage Library, you can create and manage feedback surveys. For more information about the Engage Library, [See **Engage Library** on page 275 for additional information.](#)

Active Campaigns

In the Active Campaigns section, you can view all the feedback campaigns that are currently running. Each active campaign displays in its own tile, and up to two campaign tiles can display at a time. To page through additional active campaigns, you can click the navigation arrows on either side of the two displaying tiles. Each campaign tile displays the following information:

- **Name** - The campaign title
- **Owner** - The creator of the campaign
- **Type** - The feedback campaign type (Satisfaction, Engagement, or Commitment)
- **Distribution** - The method of distribution to participants (email link or mobile)
- **Invited Participants** - The number of people invited to participate in the campaign survey
- **Completion Rate** - The percentage of invited users who have completed the campaign survey
- **Recurring** - The frequency at which the campaign survey recurs and is given to users to complete again (N/A, Daily, Weekly, Monthly, Quarterly, Annually)
- **Status icon** - Indicates the current status of the campaign (Active or Draft)
- **Start Date** - The date the campaign began
- **Close Date** - The date the campaign will end and no longer be available to invited users
- **Campaign Options** - The following options may be available for different campaigns:
 - **Edit Campaign** - Allows administrators to edit aspects of the campaign. Clicking the Edit option navigates you to the campaign creation workflow, where changes can be made to the campaign. **Note:** *Some fields are read-only for campaigns in an active status.* [See **Create Campaign - Overview** on page 267 for additional information.](#)
 - **Copy Campaign** - Allows administrators to create a new campaign by copying an existing campaign. Changes can be made to the copy without impacting the original campaign. [See **Create Campaign - Overview** on page 267 for additional information.](#)
 - **Recall** - Allows administrators to recall the campaign and remove access from all invited users. The campaign will no longer be active, and the campaign survey cannot be completed by users.

- **Delete** - Allows administrators to delete a draft campaign. This option is only available for campaigns in a draft status.

Completed Campaigns

In the Completed Campaigns section, you can view campaigns that have reached their Close Date and are no longer available for users to interact with. Up to 20 completed campaigns can display on the page at a time, and additional campaigns can be viewed by clicking available page numbers. The following information displays for completed campaigns:

- **Name** - The campaign title
- **Owner** - The creator of the campaign
- **Type** - The feedback campaign type (Satisfaction, Engagement, or Commitment)
- **Launch Date** - The date the campaign was originally launched or started by the administrator
- **Close Date** - The date the campaign ended and became unavailable to users
- **Completion Rate** - A graphical representation of the percentage of invited users who completed the campaign survey

Create Campaign - Overview

Creating a campaign allows you to send a survey to users at a selected frequency, which enables you to gather data on employee satisfaction, engagement, and commitment on an ongoing basis. Response trends over time allow organizations to make informed decisions and ensure they are fostering a positive and productive workplace.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Create New Campaign

The campaign creation process includes four steps:

1. General - See **Create Campaign - General** on page 268 for additional information.
2. Survey - See **Create Campaign - Survey** on page 270 for additional information.
3. Invitation - See **Create Campaign - Invitation** on page 271 for additional information.
4. Launch - See **Create Campaign - Launch** on page 273 for additional information.

Cancel

At any point during the creation process, you can click the **CANCEL** button to close out of the campaign creation process without saving any of the data you have input. Any configurations you have made will be discarded.

Save Draft

At any point during the creation process, you can click the **SAVE DRAFT** button to save a draft version of the campaign you are creating. The selections you have made will be saved, and you can access the draft when you are ready to make more changes from the Engage Admin Dashboard page.

Create Campaign - General

The General step of the campaign creation process allows you to input basic information about the campaign, such as its name, the campaign type, how it will be distributed to users, and how often it will be deployed.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

The screenshot shows the 'Manage Campaign' interface with the following settings:

- Campaign Name:** Employee Satisfaction 2017
- Internal Description:** Intended to gauge company-wide satisfaction for a full calendar year.
- Privacy:** On (toggle)
- Campaign Type:** Satisfaction
- Campaign Distribution:** Email link (checked), Mobile (unchecked)
- Availability:** Select Filters, Divisions: All Divisions
- Launch Date:** 01/01/2017 1:07:29 PM
- Campaign Frequency:** Recurring (checked), Daily, Weekly, Monthly, Quarterly, Annually
- Close Date:** 12/31/2017 1:07:29 PM

General

Configure the following General Settings:

- **Campaign Name** - Enter a name for the campaign.
- **Internal Description** - Provide a description of the campaign's purpose. This description will only be visible to other administrators.
- **Privacy** - Currently, the **Privacy** field is set to On and cannot be changed. This field reminds the administrator that campaigns are confidential, meaning responses are

anonymized. The responses of individual survey participants cannot be recovered. With a future release, it will be possible to turn the **Privacy** setting off, if necessary.

- **Campaign Type** - Select the campaign type from this drop-down menu. Available choices include:
 - Satisfaction
 - Engagement
 - Commitment
- **Campaign Distribution** - Select the distribution method for the survey. Available choices include:
 - Email Link - If selected, users will be provided access to the survey via a link in an email.
 - Mobile - If selected, users will be provided access to the survey via a mobile application.
- **Availability** - From the **Availability** field, choose which users will receive the survey. You can either select a division or a location organizational unit (OU). **Note:** *When a division or location is selected, all of the OU's subordinate OUs are automatically included in the availability as well.*
- **Launch Date** - Select the date and time at which the campaign survey will be deployed to users. Click the Date icon to select a specific date. Click the Time icon to select a specific time. **Note:** *The date and time selected must be in the future.*
- **Campaign Frequency** - If desired, enable recurrence for the campaign by toggling the Campaign Frequency switch to the On position. If a campaign is set to recur, it will be redeployed to users at a frequency you specify. **Note:** *Availability is recalculated with each recurrence. Only those employees eligible to receive a survey on the day of each launch will be included.* To specify a frequency, after enabling recurrence, select one of the following frequencies:
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Annually
- **Close Date** - Select the date and time at which the campaign survey will close and no longer be available to users. Click the Date icon to select a specific end date. Click the Time icon to select a specific time.

Next

After populating and selecting all the General Settings, click the **NEXT** button to advance to the Survey step. [See **Create Campaign - Survey** on page 270 for additional information.](#)

Create Campaign - Survey

The Survey step of the campaign creation process allows you to select the feedback survey which will be sent to users. You must create the survey you wish to use before creating the campaign. See [Engage Library](#) on page 275 for additional information.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Engage Dashboard > Engage Admin Dashboard > Manage Campaign

Manage Campaign

Survey

Survey	ID	Type	Author
<input checked="" type="radio"/> Satisfaction Survey	1	Satisfaction	Shobhi P

Change Survey

Back Next

Survey

The survey selected on this page will be sent to users when the campaign is deployed. Only one survey can be selected per campaign. To select a survey:

1. Click the **SELECT SURVEY** button. The Add Survey pop-up window appears.
2. Select the radio button next to the survey you want to associate with this campaign.
3. Click the **SAVE** button at the bottom of the pop-up window.

If needed, you can click the **CHANGE SURVEY** button to pick a different survey.

Next

After populating and selecting all the General Settings, click the **NEXT** button to advance to the Invitation step. See [Create Campaign - Invitation](#) on page 271 for additional information. **Note:** To return to a previous step in the campaign creation process, you can click the **BACK** button.

Create Campaign - Invitation

On the Invitation step of the campaign creation process, configure the email options for you campaign if the survey will be accessed via an email link. If you opted to deploy the campaign only via Mobile during the General step of the campaign creation process, the Invitation step is SKIPPED. Email options can only be configured for surveys being deployed to users via email. If the campaign is being deployed via mobile application, you will be navigated from the Survey step to the Launch step. [See Create Campaign - Launch on page 273 for additional information.](#)

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

CREATE CAMPAIGN

- General
- Survey
- Invitation**
- Launch

Email Invitation

Invitation From:

Tags: Display a list of tags that can be used within the subject and body of the e-mail.

Invitation Subject:

Invitation Body:

To our valued employees,

Your work satisfaction is important to us! Please take a few moments this quarter to let us know how you feel about working here so we can keep making ABC better and better!

Email Reminder

Start sending reminders: days after launch

Frequency:

Stop sending reminders: days after launch

Reminder From:

Reminder Subject:

Reminder Body:

There's still time to share your workplace satisfaction feedback with ABC! Please take a few moments today to complete a quick survey and let us know how we can keep making ABC a great place to work!

Email Invitation

Configure the following settings for the initial email users will receive:

- **Invitation From** - Enter the email address which will appear as the From address when users receive the email invitation.
- **Tags** - Click the tags search icon to see a list of tags which can be used in an Engage campaign invitation. Tags are replaced with specific user information. For example, the tag RECIPIENT.FIRST.NAME is replaced with the user's actual first name when they receive the email.
- **Invitation Subject** - Enter the subject of the email users will receive.
- **Invitation Body** - Enter the body of the email users will receive. Let users know why their feedback is important, and use tags if needed. The email will also automatically include a link to the survey you have added to the campaign.

Email Reminder

To configure a reminder email, toggle the **Email Reminder** switch to the On position. Then, configure the following email reminder options:

- **Start sending reminders** - Enter the number of days after the campaign launch that a first reminder email will be sent to users.
- **Frequency** - Specify the frequency at which reminders will be sent. Available frequency options include:
 - Once
 - Weekly
 - Monthly
- **Stop sending reminders** - Enter the number of days post-launch after which email reminders will no longer be sent.
- **Reminder From** - Enter the email address which will appear as the From address when users receive the email reminder.
- **Reminder Subject** - Enter the subject of the email users will receive.
- **Reminder Body** - Enter the body of the email users will receive. Let users know why their feedback is important, and use tags if needed. The email will also automatically include a link to the survey you have added to the campaign.

Next

After populating and selecting all the Invitation settings, click the **NEXT** button to advance to the Launch step. [See **Create Campaign - Launch** on page 273 for additional information.](#) [See **Create Campaign - Invitation** on page 271 for additional information.](#)

Note: To return to a previous step in the campaign creation process, you can click the **BACK** button.

Create Campaign - Launch

On the Launch step, review the campaign settings and either launch the campaign or save it as a draft to launch later.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

CREATE CAMPAIGN

- General
- Survey
- Invitation
- Launch

Review Campaign

Campaign: Employee Satisfaction 2017
 Survey: Satisfaction Survey
 Privacy: Confidential
 Campaign Type: Satisfaction
 Distribution: Email link
 Availability: Division: All employees
 Launch Date: 01/01/2017 12:39:15 PM
 Close Date: 12/31/2017 12:39:15 PM
 Recurring: Quarterly
 Invitation:
 To our valued employees,

Your work satisfaction is important to us! Please take a few moments this quarter to let us know how you feel about working here so we can keep making ABC better and better!

Reminder: Enabled

Launch Campaign

Launch Campaign queues your campaign and any applicable invitations. Only select Launch Campaign when your campaign is configured and ready to send.

Review Campaign

In the Review Campaign section, review the campaign configurations and check for accuracy. If a change is needed, you can click the **BACK** button at the bottom of the page to return to previous steps.

Launch Campaign

When the campaign is correctly configured and ready to deploy, click the **LAUNCH CAMPAIGN** button. The survey and associated communications will be sent to users according to your campaign settings.

Save Draft

To save your campaign without yet deploying, click the **SAVE DRAFT** button. The campaign settings will be saved and can be accessed later from the Engage Admin Console. When the campaign is ready, you can return to the campaign creation process for the campaign and click the **LAUNCH CAMPAIGN** button on the Launch step.

Engage Library

In the Engage Library, you can manage and create surveys, dimensions, and questions which are used in feedback campaigns. Manage each of these items by clicking the corresponding tab at the top of the page.

To access the Engage Library, go to **ANALYTICS > ENGAGE** and click the **ENGAGE ADMIN DASHBOARD** button. Then, click the **ENGAGE LIBRARY** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Engage Library

Create Survey

Surveys
Dimensions
Questions

Use the search tool to search for Surveys. You can remove any Surveys which have not already been included in a campaign and you can inactivate any Surveys which should not be added to a campaign in the future.

All Types ▼
Active ▼
Survey ▼

1
2
3

1 to 20 of 41

Survey	ID	Type	Author	Mobile	Active	Options
Satisfaction Survey	1	Satisfaction	Shobhi P	No	Yes	▼
Engagement Survey	2	Engagement	Shobhi P	No	Yes	▼
Commitment Survey	3	Commitment	Shobhi P	No	Yes	▼

Surveys

By default, when you navigate to the Engage Library page, the Surveys tab is selected. The Surveys tab allows you to create and manage the surveys which can be attached to feedback campaigns. Surveys must be created before you can create a campaign, but survey questions must first be created in order to build a survey. See the Questions section below.

When the Surveys tab is selected, you can search for existing surveys using the Search bar. You can also filter existing surveys by the following criteria:

- **Survey Type** - Allows you to select a survey type and view only surveys of that type. Available types include:
 - Satisfaction
 - Engagement
 - Commitment

- **Status** - Allows you to filter for Active or Inactive surveys
- **Survey Criteria** - Allows you to sort the survey search results by Survey name or Survey ID

In the survey table, up to 20 existing surveys display. You can access additional search results by clicking the search result page numbers. Existing surveys display with the following information:

- **Survey** - The name of the survey
- **ID** - The ID number of the survey
- **Type** - The type of survey (Satisfaction, Engagement, or Commitment)
- **Author** - The administrator who created the survey
- **Mobile** - Displays whether or not the survey is a mobile survey (Yes or No)
- **Active** - Displays whether or not the survey is currently active (Yes or No)
- **Options** - Allows you to manage surveys using the following options, if available:
 - **Edit** - Allows you to make changes to the survey. Keep in mind that the changes you make impact any currently running feedback campaigns. Some fields cannot be changed.
 - **Delete** - Allows you to delete a survey. This option is only available for surveys which are not yet associated with a campaign.

To create a new survey, click the **CREATE SURVEY** button in the upper-right corner of the page. See [Create Survey](#) on page 278 for additional information.

Dimensions

The Dimensions tab allows you to view the system dimensions, which are used to organize your survey questions and control the reporting dashboard aggregation. Satisfaction, Engagement, and Commitment dimensions aggregate to the corresponding reporting tabs and are used to calculate overall scores and trend lines. Individual, Team, Organization, and Open Ended dimensions contain questions that do not directly measure Satisfaction, Engagement, and Commitment, but instead provide context to better understand overall scores. These dimensions include the Driver questions.

Note: *It is not currently possible to create new dimensions. This functionality will be made available in a future release.*

When the Dimensions tab is selected, you can search for existing dimensions using the Search bar. You can also filter existing dimensions by the following criteria:

- **Status** - Filter by active or inactive dimensions
- **Dimension Criteria** - Allows you to sort the dimension search results by dimension name or dimension ID.

In the dimensions table, each existing dimension displays with the following information:

- **Dimension** - The name of the dimension
- **ID** - The ID number of the dimension
- **Author** - The creator of the dimension

- **Active** - Displays whether or not the dimension is active (Yes or No)

Questions

The Questions tab allows you to create and manage the questions which can be used in surveys. Survey questions must first be created in order to build a survey.

When the Surveys tab is selected, you can search for existing surveys using the Search bar. You can also filter existing surveys by the following criteria:

- **Dimension**- Allows you to select a dimension and view only questions associated with that dimension. Available dimension choices depend on what dimensions you have created via the Dimensions tab
- **Status** - Allows you to filter for Active or Inactive questions
- **Question Criteria** - Allows you to sort the question search results by Question name or Question ID

In the survey table, up to 20 existing questions display. You can access additional search results by clicking the search result page numbers. Existing questions display with the following information:

- **Question** - The name of the question
- **Type** - The type of the question (smiley or open-ended)
- **ID** - The ID number of the question
- **Dimension** - The dimension associated with the question
- **Language** - The language selected for the question
- **Author** - The creator of the question
- **Active** - Whether or not the question is currently active (Yes or No)
- **Options** - Allows you to manage existing questions using the following options, if available:
 - **Edit** - Allows you to make changes to existing questions. Some fields cannot be changed if the question is being used in a survey. You will receive a warning if the question is being used in a survey.
 - **Delete** - Allows you to delete a question. This option is only available for questions which are not yet being used in a survey.

To create a new question, click the **CREATE QUESTION** button in the upper-right corner of the page. [See Create Question](#) on page 280 *for additional information*.

Create Survey

Once created, surveys can be associated with feedback campaigns and sent to users to help the organization gain valuable insight into employee views. Before creating a survey, it is necessary to create all the questions that will be contained in the survey via the Questions tab. See [Create Question](#) on page 280 for additional information.

To create a new survey, go to ANALYTICS > ENGAGE and click the **ENGAGE ADMIN CONSOLE** button. Next, click the **ENGAGE LIBRARY** button. Then, select the Surveys tab and click the **CREATE SURVEY** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Create Survey

General Settings

Survey Name

Internal Description

Default Locale English (US) ▼

Participant Instructions ✕

Survey Type Satisfaction ▼

Mobile Pulse

Active

Add Pages

Add Page

Cancel
Save

General Settings



First, configure the following general settings for the new survey:

- **Survey Name** - Enter a descriptive name for the survey.
- **Internal Description** - Enter a description for the survey which is visible only to administrators.
- **Default Locale** - Select the language of the survey from the drop-down menu.
- **Participant Instructions** - Enter instructions explaining how to complete the survey, which will be visible to users who receive the survey via a campaign.
- **Survey Type** - Select the survey type from the drop-down menu (Satisfaction, Engagement, Commitment)
- **Mobile Pulse** - Mobile Pulse surveys are specifically designed for distribution within the Mobile app. They are limited to a maximum of 5 questions, and no more than 1 question per page. To enable this survey for use with the Mobile app, toggle the switch to the On position.
- **Active** - The Active switch is turned on by default, and renders the survey active and available for use in campaigns immediately after the survey is saved. To save a survey without activating it, toggle this switch to the Off position.

Add Pages

After the general settings have been configured, add survey pages and then add questions to your pages. If you build a survey with multiple pages, users will navigate through multiple survey pages when completing the survey. For example, if you build a survey with three pages, and there are four questions on each page, the user will need to click **NEXT** after answering each set of four questions.

To build the structure of your survey:

1. Click the **ADD PAGE** button. A section labeled Page 1 appears.
2. Click the **ADD QUESTIONS** button which appears below the section. A pop-up window with available questions appears.
3. Check the boxes of the questions you want to include in this survey section. You can search for and filter for specific questions using the search function and filtering criteria. You can also navigate to additional pages of search results by clicking the page numbers. After choosing at least one question, you can click the Selected tab to view only the questions you have selected.
4. Click the **ADD** button after all questions for the section have been selected. The questions appear in under Section 1, along with their associated dimension and response type. Using the Options column, you can either delete questions using the Delete icon , or you can drag and drop questions into a different display order by clicking and dragging the Reorder icon .
5. Continue adding additional sections and questions as needed, using the same process.

Save

Click the **SAVE** button to save the new survey. The survey will be added to the Surveys tab of the Engage library, and if saved in an active state, the survey will be available for use with campaigns. [See Create Campaign - Overview](#) on page 267 *for additional information*. To leave the survey creation page and discard all configurations, click the **CANCEL** button.

Create Question

Two different types of questions can be created for use in Engage surveys: Smiley questions and open-ended questions. Smiley questions allow users to rate their general feelings about various issues, using a Likert scale which associates responses with emoticons rather than numbers. Open-ended questions allow users to provide text responses.

To create a new question, go to **ANALYTICS > ENGAGE** and click the **ENGAGE ADMIN CONSOLE** button. Next, click the **ENGAGE LIBRARY** button. Then, select the Questions tab and click the **CREATE QUESTION** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Smiley

To create a Smiley question, select the **Smiley** option from the **Question Type** drop-down menu. Then, configure the following options for the question:

- **Dimension** - Select the dimension with which this question should be associated. Dimensions must be created prior to creating questions. [See Create Dimension.](#)
- **Allow Comments** - To allow users to provide comments for their question response, toggle this switch to the On position.
- **Active** - The Active switch is turned on by default, and renders the question active and available for use in surveys immediately after the question is saved. To save a question without activating it, toggle this switch to the Off position.
- **Question Text** - Enter the question or statement you want users to respond to. This field can be localized into other languages using the Globe icon.
- **Default Locale** - Select the applicable language for the question from this drop-down menu.
- **Response Options** - Configure the Likert scale responses, with corresponding emoticons, for the question. Ensure that the question being asked can be responded to using the response options you have provided, and ensure the emoticons correspond with the nature of the responses. The user can only see these descriptions by hovering over the smiley face icons in the survey. These fields can be localized into other languages by clicking the Globe icon. By default, the available response options are:
 - Strongly Disagree
 - Disagree
 - Neutral
 - Agree
 - Strongly Agree

After configuring the question, click the **SAVE** button to add the question to the Questions library. The question will then be available for use with surveys. To discard the question you have created without saving it, click the **CANCEL** button at the bottom of the page.

Create Question

Question Type	<input type="text" value="Smiley"/>
Dimension	<input type="text" value="Satisfaction"/>
Allow Comments	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Question Text	<input style="height: 40px;" type="text"/>
Default Locale	<input type="text" value="English (US)"/>
Response Options	<input type="text" value="☹ Strongly Disagree"/> <input type="text" value="☹ Disagree"/> <input type="text" value="☺ Neutral"/> <input type="text" value="☺ Agree"/> <input type="text" value="☺ Strongly Agree"/>

Open Ended

To create an open-ended question, select the **Open Ended** option from the **Question Type** drop-down menu. Then, configure the following options for the question:

- **Dimension** - Select the dimension with which this question should be associated. Dimensions must be created prior to creating questions. [See Create Dimension.](#)
- **Allow Comments** - This field is grayed out and cannot be modified for Open Ended questions.
- **Active** - The **Active** switch is turned on by default, and renders the question active and available for use in surveys immediately after the question is saved. To save a question without activating it, toggle this switch to the Off position.
- **Question Text** - Enter the question you want users to respond to. Users will be able to provide an open-ended text response for this question. This field can be localized into other languages using the Globe icon.
- **Default Locale** - Select the applicable language for the question from this drop-down menu.

After configuring the question, click the **SAVE** button to add the question to the Questions library. The question will then be available for use with surveys. To discard the question you have created without saving it, click the **CANCEL** button at the bottom of the page.

Create Question

Question Type	<input type="text" value="Open Ended"/>
Dimension	<input type="text" value="Open Ended"/>
Allow Comments	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Question Text	<input type="text"/>
Default Locale	<input type="text" value="English (US)"/>

Enable Mobile Widget - Engage

When creating a campaign, administrators can configure the survey associated with the campaign to be deployed via email or the mobile app. In order for users to access Engage surveys via the Mobile app, the Engage widget must be enabled on the Mobile Dashboard via Mobile Preferences.

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

Mobile Dashboard

Choose a widget to add:
 Please Select + Add

Turn on Engage Widget
 The Engage widget will be placed on the TOP LEFT corner of the Mobile Dashboard.
 To configure the survey, go to Analytics > Engage > Admin Dashboard.

Search For Training
 Widget Text *
 Search For Training
 Select an Icon
 SearchforTraining.jpg

Trainings Due Soon
 Widget Text *
 Trainings Due NOW!
 Select an Icon
 Traing Due Soon.png

Items for Approval
 Widget Text *
 Items for Approval
 Select an Icon
 peteyblue.jpg

Featured Training
 Select a Learning Object *
 Select Training

New Posts
 Widget Text *
 New Posts

Mobile Dashboard

To add the Engage widget to the Mobile Dashboard:

1. Click the **Please Select** drop-down menu in the Mobile Dashboard section of the Mobile Preferences page.
2. Select the **Engage Widget** from the menu.
3. Click the **ADD** button. This causes the **Turn on Engage Widget** toggle to appear.
4. Switch the **Turn on Engage Widget** toggle to the On position.
5. Click the **SAVE** button at the bottom of the Mobile Preferences page. The Engage widget will be available to mobile users after saving.

Engage Survey - End User Experience


After a campaign with the **Email Link** setting enabled has been launched, users who have been invited to provide feedback receive an email inviting them to share their feedback. The email displays the subject and email body configured by the campaign creator, along with a link to the associated survey. **Note:** *Users must have the end user permission to receive an Engage survey invitation in order to receive the email.*

After a campaign with the Mobile setting enabled has been launched, the survey becomes available to users with the appropriate permission via the Mobile app dashboard. **Note:** *The Engage widget must be enabled for the Mobile Dashboard in order for mobile users to access surveys. See **Enable Mobile Widget - Engage** on page 283 for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage

End User View - Email



Tue 5/23/2017 2:40 PM

HRAdmin@abc.com

Share your feedback with ABC Corp!

To ■ Lindsey Pauley

To our valued employees,

Your work satisfaction is important to us! Please take a few moments this quarter to let us know how you feel about working here so we can keep making ABC better and better!






[Click here to provide feedback](#)

When the user accesses the survey via an email link, they can provide responses to the survey questions. For Smiley type questions, users select the emoticon which best describes their reaction to a question. For Open Ended type questions, users provide a free-form text response. If a survey has multiple pages, users can click the **NEXT** button to advance to the next page. After reaching the end of the survey, users can click the **SUBMIT** button to submit their responses.

Survey Name






Question 1

How do you feel today?






Question 2

How do you like today's meeting?

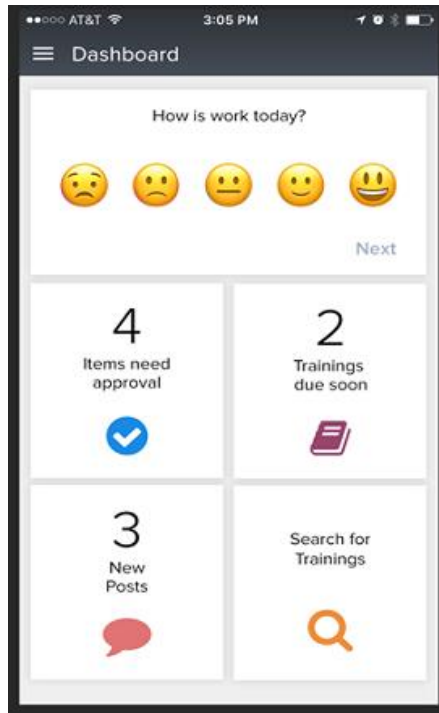
Question 3

Do you prefer working from home?

End User View - Mobile

When the user accesses the survey via the Mobile app, they can provide responses to the survey questions. For Smiley type questions, users select the emoticon which best describes their reaction to a question. For Open Ended type questions, users provide a free-form text response. Only one question can display per page on the Mobile app. Users can press the **NEXT** button to advance to the next question. After reaching the end of the survey, users can press **SUBMIT** to submit their responses.



Mobile Engage Widget

Mobile Engage Widget - Overview

The Engage survey platform was released in June 2017, which allows companies to regularly survey their employees for levels of satisfaction, engagement, and commitment. Engage surveys could be completed by employees via desktop computers.

With this enhancement, a mobile widget for Engage surveys is available on the Cornerstone mobile application, allowing users to quickly access company surveys using their mobile devices.

The Engage module was released after the Cornerstone Convergence event on June 6, 2017. [See Engage - Overview](#) on page 255 for additional information.

Use Case

Kim is the VP of talent at ACME Co and wants to gauge the moods of ACME employees on a daily basis so she can measure team morale across different departments over time. She enables the Engage tool for specific divisions, the Development team being one of them.

Now Isadora, an employee on the Development team, sees an Engage widget on her mobile app every day at 5pm. At this time, she can indicate her current mood using the Engage widget on her Mobile Dashboard. Isadora can also send random feedback to HR about things that would make the team happier, such as a larger budget for team outings or more feedback from executive staff.

Implementation

This functionality is automatically available for the Cornerstone Mobile application for organizations using the Engage module. Administrators can enable the Engage widget via Mobile Preferences.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage
Mobile Dashboard Administrator	Allows system admins to create/ updated and delete widgets.	Mobile

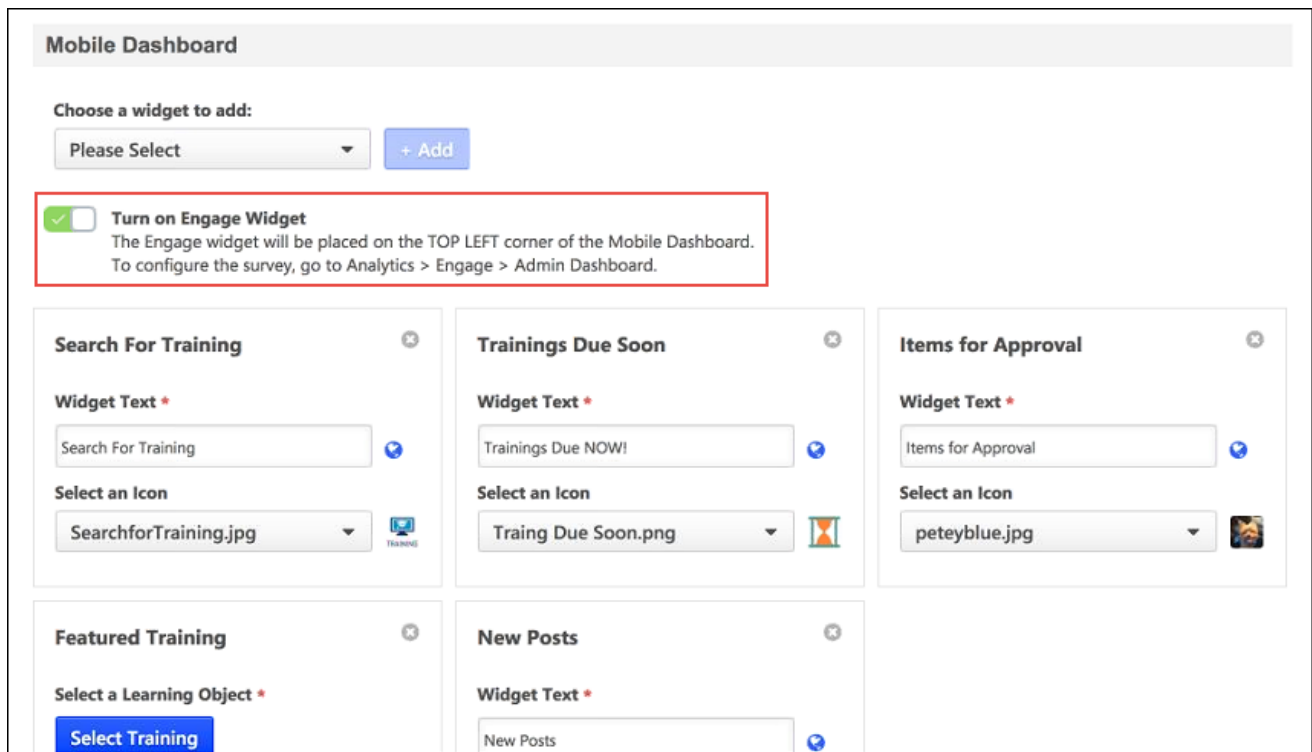
Manage Mobile Engage Widget

With this release, the Engage widget is automatically available for portals using the Engage module and the Mobile application. The widget is configurable via the Mobile Dashboard Preferences page. Administrators with the appropriate permission can disable or enable the widget at any time.

To access Mobile Preferences, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > MOBILE DASHBOARD**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Mobile Dashboard Administrator	Allows system admins to create/ updated and delete widgets.	Mobile



Mobile Dashboard

To enable the Engage widget on the Mobile Dashboard:

1. On the Mobile Dashboard preferences page, toggle the Turn On Engage Widget switch to the on position.
2. Click the **SAVE** button at the bottom of the Mobile Preferences page. The Engage widget will be available to mobile users after saving.

Engage Widget - End User View

After an Engage survey campaign with the Mobile setting enabled has been launched, the survey becomes available to users with the appropriate permission via the Mobile app dashboard. **Note:** *The Engage widget must be enabled for the Mobile Dashboard in order for mobile users to access surveys.*

See **Manage Mobile Engage Widget** on page 290 for additional information.

See **Create Campaign - Overview** on page 267 for additional information.

Permissions

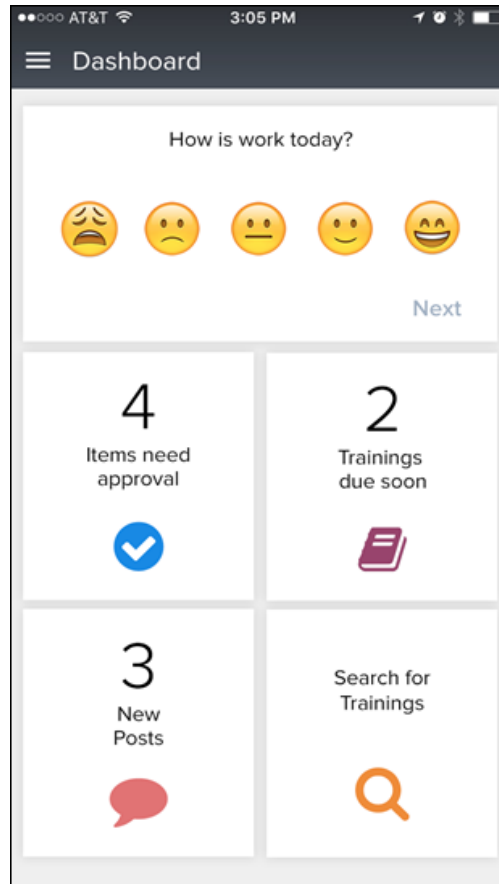
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage

End User View - Mobile

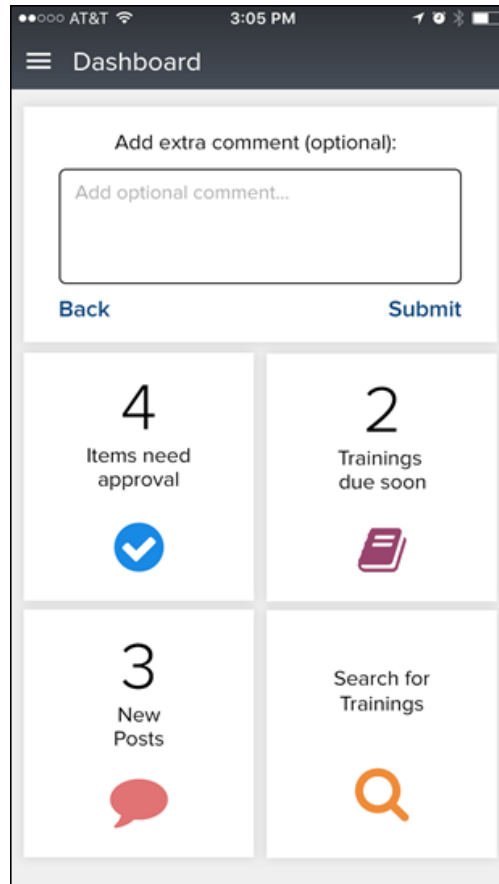
Available Engage surveys display to users in the Engage widget, which is located at the top of the Mobile Dashboard when the user accesses the Mobile application. If the user taps the widget, they can answer survey questions. **Note:** *If no Engage surveys are currently available to the user, the widget displays, "0 Surveys."*

Two types of questions are available for Engage Surveys:

Mood Selection - For Mood Selection questions, users select the emoticon which best describes their reaction to a question. Only one question can display per page on the Mobile app. Depending on how the administrator configured the Mood Selection question, the user may have the option to provide a comment explaining their selection.



Open Ended Questions - For Open Ended type questions, users provide a free-form text response to a question.



Users can press the **SUBMIT** button to advance to the next question. For mood questions that include an optional comment, user will see **NEXT** button instead of **SUBMIT** at the mood question page. Only one question displays per page. If there are no more questions available to the user, user sees '0 Surveys'

Engage

Engage Actions

Engage Actions - Overview

Prior to this enhancement, Engage administrators could distribute survey campaigns either via an email link or using the Mobile dashboard.

With this enhancement, in addition to the email link and mobile distribution methods, Engage administrators can also distribute surveys via the Actions page of users' Universal Profiles.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Campaign Distribution

The General step of the campaign creation process allows you to input basic information about the campaign and select how the survey will be distributed to users. With this enhancement, Engage administrators can distribute surveys to users via the Actions page of their Universal Profiles.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

CREATE CAMPAIGN

- General
- Survey
- Invitation
- Launch

Manage Campaign

General Settings

Campaign Name

Internal Description ?

Privacy ?

Campaign Type

Campaign Distribution Email link Mobile Action Item

Availability +

Launch Date 📅 🕒

Campaign Frequency Recurring

Close Date 📅 🕒

Campaign Distribution

To distribute the survey via the Actions page of users' Universal Profiles, check the **Action Item** option available for the **Campaign Distribution** field. Then, continue configuring the campaign as desired. **Note:** *Multiple distribution methods may be selected simultaneously.*

When the campaign is launched and active, the survey will appear to users on the Actions page of their Universal Profile.

See **Create Campaign - Overview** on page 267 *for additional information*.

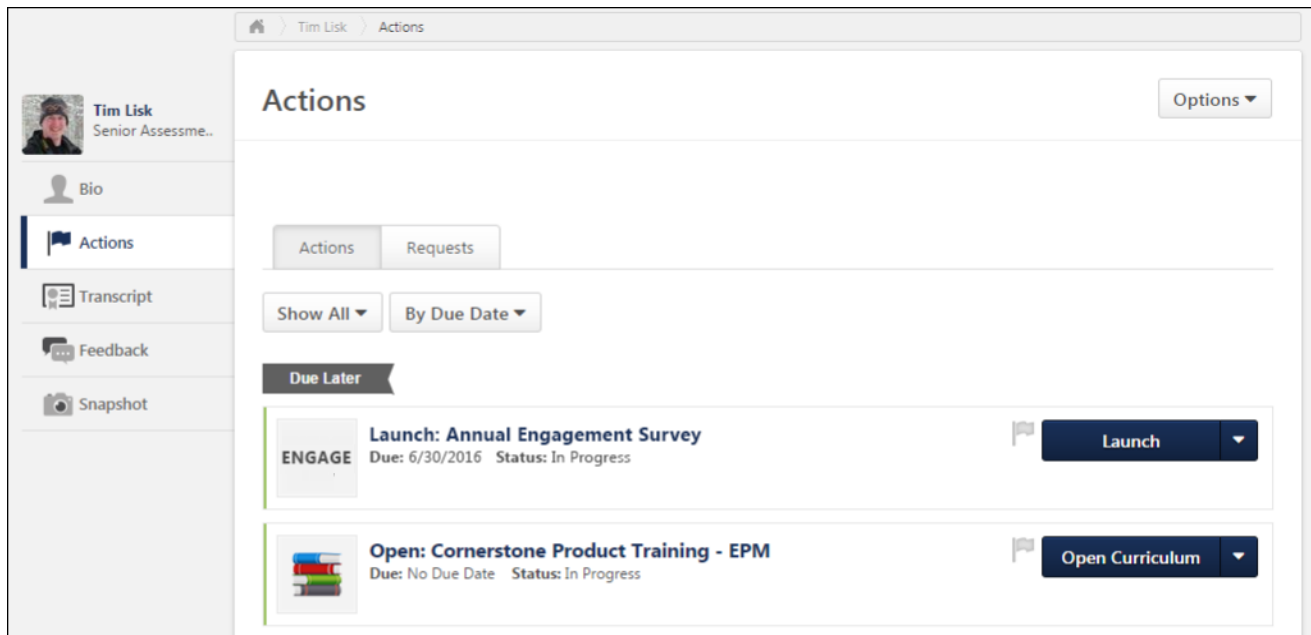
Engage - Universal Profile Actions

If an Engage administrator has configured a feedback campaign to be distributed as an action item, and the campaign has been launched, the survey displays to users as an action item on the Actions page of Universal profile.

To access the Universal Profile, go to **HOME > UNIVERSAL PROFILE**. Then, click the Actions tab to navigate to the Actions page of Universal Profile.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage



Filter

Using the Action Type drop-down menu that displays above the user's available action items, users can filter the Actions page for only Engage surveys. To view only available Engage surveys on the Actions page, click the **Action Type** drop-down menu and click the **Engage Survey** filter. The page will refresh to display only Engage surveys in which the user has been invited to participate. **Note:** *The user must have the permission to receive Engage survey invitations in order for Engage surveys to display on the Actions page of Universal Profile.*

Launch Engage Survey

If a user has been invited to participate in an Engage survey as an action item, when the user navigates to the Actions page of their Universal Profile, the survey displays as an available action item, along with the following information and options:

- **Engage Survey icon** - The system image icon for Engage surveys appears to the left of Engage survey action items to denote the action item type.
- **Title** - This field displays the title of the Engage survey.
- **Due Date** - This field displays the date the survey completion is due.
- **Status** - This field displays the current status of the survey. Possible statuses include:
 - In Progress
- **Actions** - Using the Actions drop-down menu, users can perform the following actions for Engage surveys, depending on the current status of the survey:
 - **Launch** - Click **Launch** to open and complete the survey in a new browser window.

Note: *The user must have the permission to receive Engage survey invitations in order for Engage surveys to display on the Actions page of Universal Profile.*

Considerations

- A campaign that is scheduled but not launched does not appear as an action item for users in Universal Profile.
- In the case of a recurring campaign, only the current campaign recurrence displays on a user's Actions page.
- When a campaign (or campaign recurrence) ends, the action item is removed from a user's Actions page.
- When a user completes a survey via an email link or the mobile dashboard, if the survey was distributed via multiple methods, the action item is also rendered complete and removed from the user's Actions page.
- When a user completes a survey via the Actions page, they no longer receive reminders via other distribution channels if the survey was distributed via multiple methods.

Campaign Status Enhancements

Campaign Status Enhancements - Overview

Prior to this enhancement, Engage administrators were able to manage the system's feedback campaigns, but it was not possible to delete draft campaigns, view the details of a closed campaign, or easily view and manage campaigns in a Scheduled status.

With this enhancement, Engage administrators can do the following:

- Quickly view and manage campaigns that are in the queue and ready to launch
- Review the details of closed campaigns, which helps design follow-up campaigns
- Delete draft campaigns, which prevents unneeded campaigns from cluttering the Engage Library

Implementation

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

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Manage Scheduled Campaign

If an Engage campaign has been launched but has not yet reached its start date, it is in a status of Scheduled. Prior to the start date, administrators can continue to make edits to the scheduled campaign if necessary.

To make edits to an Engage campaign, go to **ANALYTICS > ENGAGE** and then click the **ENGAGE ADMIN DASHBOARD** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

2016 Annual Company-wide Satisfaction Survey

Owner: CSOD

Type: Satisfaction

Distribution: Email

Invited Participants: 300

Completion Rate: 0%

Recurring: Quarterly


Scheduled



Start Date: Dec 31, 2015
Close Date: Dec 29, 2016

Edit Campaign

▼

Edit Campaign

To edit a scheduled campaign, click the **EDIT CAMPAIGN** button in the bottom right of the campaign's tile in the Active Campaigns section on the Engage Admin Dashboard. Clicking the Edit Campaign button for a scheduled campaign triggers a warning message that says, "This campaign has been scheduled, are you sure you want to make changes?" To exit the warning without making changes to the campaign, click the **CANCEL** button. To continue editing the campaign, click the **EDIT** button.

You can advance through the five steps of the campaign setup process and make any needed changes. The same fields which can be edited for active campaigns can be edited for scheduled campaigns, which include the following:

- Campaign Name
- Internal Description
- Availability

- Campaign Frequency
- Close Date
- Invitation/Reminder From
- Invitation/Reminder Subject
- Invitation/Reminder Body

If more substantial changes are required, it is recommended that you recall the campaign and create a new campaign. After reaching the Review Campaign step, you can click the **RE-LAUNCH SURVEY** button to apply your changes to the campaign. The option to save the campaign as a draft is NOT available for scheduled campaigns.

Recall Campaign

To recall a scheduled campaign, click the action drop-down menu in the bottom right of the campaign's tile in the Active Campaigns section on the Engage Admin Dashboard. Then, select the **Recall Campaign** option. This triggers a warning message that says, "Warning: This campaign will be canceled and its status changed to Draft. Are you sure?" Click the **CONFIRM** button to recall the campaign and revert the campaign to a draft. Click the **CANCEL** button to close out of the warning without recalling the campaign.

Delete Draft Campaign

Administrators are able to delete draft campaigns that they are no longer planning on using, via the Engage Admin Console page.

To access the Engage Admin Console, go to ANALYTICS > ENGAGE and click the **ENGAGE ADMIN CONSOLE** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Delete Draft Campaign

Only draft campaigns which have not yet been scheduled can be deleted from the Engage library. To delete a draft campaign, find the campaign on the Engage Admin Console page and click the **Options** drop-down menu for the campaign. Then, click the **Delete** option.

A warning message appears with text that reads, "Warning: This campaign will be permanently deleted. Are you sure?" Click **CONFIRM** to finalize the deletion of the campaign. Click the **CANCEL** button to cancel the deletion without affecting the campaign draft. Once the campaign has been deleted, it is removed from all areas of the Engage module.

- **Campaign** - The campaign title
- **Survey** - The survey selected for the campaign
- **Privacy** - Displays whether or not the survey responses are confidential
- **Campaign Type** - The type of campaign (Satisfaction, Engagement, Commitment)
- **Distribution** - The method of survey distribution (email link, action item, or mobile)
- **Distribution Filters** - The user criteria selected for survey recipients
- **Launch Date** - The date the campaign was launched to users
- **Close Date** - The date the campaign ended
- **Recurring** - Displays whether or not recurrence is enabled for the campaign
- **Invitations** - Displays the text of campaign Invitations (when applicable)
- **Reminders** - Displays the text of campaign Reminders (when applicable)
- **Invited Participants** - The number of users who were invited to provide feedback for the campaign survey
- **Completion Rate** - The percentage of invited users who completed the survey

To return to the Engage Admin Dashboard after reviewing the campaign details, click the **BACK** button.

Engage Filter and Reporting Enhancements

Engage Filter and Reporting Enhancements - Overview

Prior to this enhancement, Engage administrators had access to a wide range of survey data gathered through the Engage platform, but compiling the data in a meaningful way sometimes required multiple steps.

With this enhancement, the Engage Dashboard features improved filtering and reporting functionality, which makes it easier to extract meaningful data collections from employee feedback. Enhancements to the Engage Dashboard include:

- The ability to filter report results and distribute surveys by employee tenure
- The ability to easily navigate up and down the company hierarchy in the heat map
- The auto-removal of connective words from word cloud charts, such as "the," "of," and "and"
- The ability to view paginated question and driver tables

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

Employee Tenure Filter

The Engage Dashboard displays a high-level view of the results of your Satisfaction, Engagement, and Commitment campaigns. Numerous filters are available for use with the data charts that display on the Engage Dashboard, and with this enhancement, a filter for employee tenure is available. The Tenure filter allows administrators and managers to distribute survey results according to tenured employees and view feedback from employees with a large amount of experience at the company.

The Tenure filter is also available when configuring availability for the campaign during the creation process. This allows administrators to only distribute certain surveys to employees who have been working at the company for a specific amount of time, such as at least three years.

To access the Engage Dashboard, go to **ANALYTICS > ENGAGE**.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

The screenshot displays the 'Tenure' filter selection interface on the Engage Dashboard. The interface features a horizontal toggle bar with markers for selecting a range of employee tenure. Below the bar, there are input fields for 'MINIMUM DAYS' (set to 99) and 'MAXIMUM DAYS' (set to 330). A 'Submit' button is located at the bottom right of the filter panel. The background shows the dashboard with a '100% Complete' status and various navigation tabs like 'Succession', 'Admin', 'Certifications', 'Connect', and 'Analytics'.

Engage Dashboard - Select Tenure

On the Engage Dashboard, the data charts for selected campaigns can be filtered by employee tenure. To apply a tenure range to the data sets:

1. Click the **Select Filters** selection box in the upper-left corner of the Engage Dashboard. A Select Filters flyout opens on the left side of the page.
2. Click the Add icon for the Tenure filter.
3. Select a tenure range either using the Tenure toggle bar or by entering a minimum and maximum number of days employed. If using the toggle bar, drag the left marker to the minimum number of days an employee must have been working at the company in order to be included in the data charts. Drag the right marker to the maximum number of days an employee can have been working at the company in order to be included in the data charts.
4. After the tenure range has been selected, click the **SUBMIT** button at the bottom of the flyout. The Tenure range will be applied to the Engage Dashboard charts, and only employees with tenure in that range will be included in the chart data.

Note: If the campaign is set to recur, tenure is recalculated with each recurrence and the survey is distributed to any user who meets the tenure requirements on that day.

Create Survey - Tenure Filter

On the General step of the campaign creation process, you can set availability to a specific employee tenure. To set availability to a tenure range:

1. Click the **Select Filters** selection box in the Availability field. A Select Filters flyout opens on the left side of the page.
2. Click the Add icon for the Tenure filter.

3. Select a tenure range either using the Tenure toggle bar or by entering a minimum and maximum number of days employed. If using the toggle bar, drag the left marker to the minimum number of days an employee must have been working at the company in order to receive the survey. Drag the right marker to the maximum number of days an employee can have been working at the company in order to receive the survey.
4. After the tenure range has been selected, click the **SUBMIT** button at the bottom of the flyout. The Tenure range will be applied to the campaign availability, and only employees with tenure in that range will receive the campaign survey.




Heat Map Drill Down

The heat map located on the Engage Dashboard allows administrators and managers to view average satisfaction, engagement, or commitment scores for various organizational units (OUs) and associated demographics. Administrators can drill down through the OUs to view the scores for child OUs.

To access the Engage Dashboard, go to **ANALYTICS > ENGAGE**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

Division	Satisfaction	People	Personal	Organization
 Sales	47.8	47.8	47.8	47.8
North America - Field Sales 	25	25	25	25
North America - Inside Sales 	20	20	20	20

Heat Map

Below the charts, you can view a heat map of different employee groups, such as different divisions or locations, with more specific response data for those groups. For each employee group, the following columns display with data, if available:

- **Demographic name** - The name of the employee group, such as division, location, or all employees.
- **Satisfaction/Engagement/Commitment** - The average satisfaction, engagement, or commitment percentage of the group.
- **People/Personal/Organization** - The average percentage score across driver questions for the team, individual, or organization dimensions. The questions in these dimensions are used to provide more context for Satisfaction/Engagement/Commitment data.

Clicking an organizational unit (OU) allows the administrator to drill down to view child OUs of the parent OU and associated sub scores. Clicking a child division causes the heat map to refresh and display the selected OU as the new parent OU, along with its child OUs and associated scores. Any active filters are retained while navigating the heat map hierarchy.

Driver and Question Table Pagination

On the bottom of the Engage Dashboard, the drivers and questions for the selected campaign type display in separate sections. With this enhancement, the administrator is not limited to viewing only the highest-rated or most-answered questions. The administrator can view more drivers and questions by paging through all available drivers and questions for the campaign.

To access the Driver Details and Question Details sections, go to **ANALYTICS > ENGAGE** and scroll to the bottom of the Engage Dashboard page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

DRIVER DETAILS

<div style="background-color: #333; color: white; padding: 5px; display: inline-block; margin-bottom: 5px;">74</div> <p>Can you concentrate on one task for a long time?</p>	<div style="background-color: #333; color: white; padding: 5px; display: inline-block; margin-bottom: 5px;">62</div> <p>Do you have a lot of friends among your co-workers?</p>
<div style="background-color: #333; color: white; padding: 5px; display: inline-block; margin-bottom: 5px;">61</div> <p>Do you like to give advices?</p>	<div style="background-color: #333; color: white; padding: 5px; display: inline-block; margin-bottom: 5px;">55</div> <p>Do you prefer working from home!?</p>
<div style="background-color: #333; color: white; padding: 5px; display: inline-block; margin-bottom: 5px;">51</div> <p>Can you work in noisy places?</p>	<div style="background-color: #333; color: white; padding: 5px; display: inline-block; margin-bottom: 5px;">50</div> <p>Do you prefer come to the office before 8am?</p>

« « 1 2 3 4 5 » »

19 to 24 of 100

Driver and Question Details

Both the Driver Details section and the Question Details section display all available drivers and questions, respectively. A maximum of six drivers can display at a time in the Driver Details section, and a maximum of six questions can display at a time in the Question Details section. To view specific pages of results, click the page numbers that display in the bottom-right corner of the relevant section. To navigate to the first page of results, click the left-facing double arrow icon. To navigate to the last page of results, click the right-facing double arrow icon. The single arrow icons can be used to page chronologically back and forward through pages of search results.

Drivers are sorted by highest-scoring. Questions are sorted by most-answered.

Word Cloud Filtering

With this enhancement, the word cloud in the Themes section of the Driver Details page filters out connector words. Commonly used articles and conjunctions, such as "of" and "or" are not included in the word cloud even if they are the most commonly used words in users' survey responses.

To access the word cloud for a driver question, go to **ANALYTICS > ENGAGE** and scroll to the bottom of the Engage Dashboard page. Then, click a specific driver question. Scroll to the bottom of the Driver Details page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage



Themes

The Themes section displays a word cloud, which displays the top words used in survey responses. The more times a specific word is used in a response to the question, the larger it appears in the word cloud. For example, if the word "customer" is the largest text size, this indicates that "customer" was the word used most often in survey responses. The word cloud filters out connector words like "the," "and," and "a," so that more illustrative response words are not lost in the cloud.

Engage

Engage - Overview

Prior to this enhancement, it was necessary for administrators to use annual engagement surveys or pulse feedback platforms in order to gather internal employee feedback, and these mechanisms were not integrated across their Unified Talent Management suite.

With the Engage platform, released in June 2017, administrators can create and schedule recurring, continuous feedback campaigns to capture satisfaction and engagement feedback from employees using mobile or web devices. Engage can be used to measure employees on three dimensions: Satisfaction, Engagement, and Commitment, allowing organizations to continue fostering a productive workplace.

[Click here to access the Engage Starter Guide.](#)

Use Cases

Use Case 1

An HR administrator wants to ask employees in the organization how they feel about a range of topics, such as whether they receive regular feedback from their manager, whether they feel safe at the office after regular hours, and whether they are likely to recommend the company to a friend as a great place to work. The admin creates an engagement survey using the Engage Library, and then configures a recurring quarterly survey campaign to collect this feedback.

Use Case 2

An employee wants to be able to provide confidential feedback about the organization, but they don't want to spend thirty minutes completing a survey. They complete a daily allotment of two or three questions using their mobile app in less than ten seconds per day.

Use Case 3

An executive wants to be able to view the satisfaction and engagement scores for their department or team. They want to be able to cut and filter the results by organizational unit (OU) and question category. They also want to be able to view the open ended responses for a specific question.

Implementation

The Engage module is available for purchase, and can be activated in Pilot, Stage, and Production portals upon enablement. It is NOT part of the Performance module. Engage can be purchased independent of other product lines. Please contact Global Product Support for more information and to enable Engage.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
-----------------	------------------------	----------

Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Mobile Preferences	Grants ability to manage Mobile Preferences. This permission cannot be constrained.	Mobile

Engage Dashboard

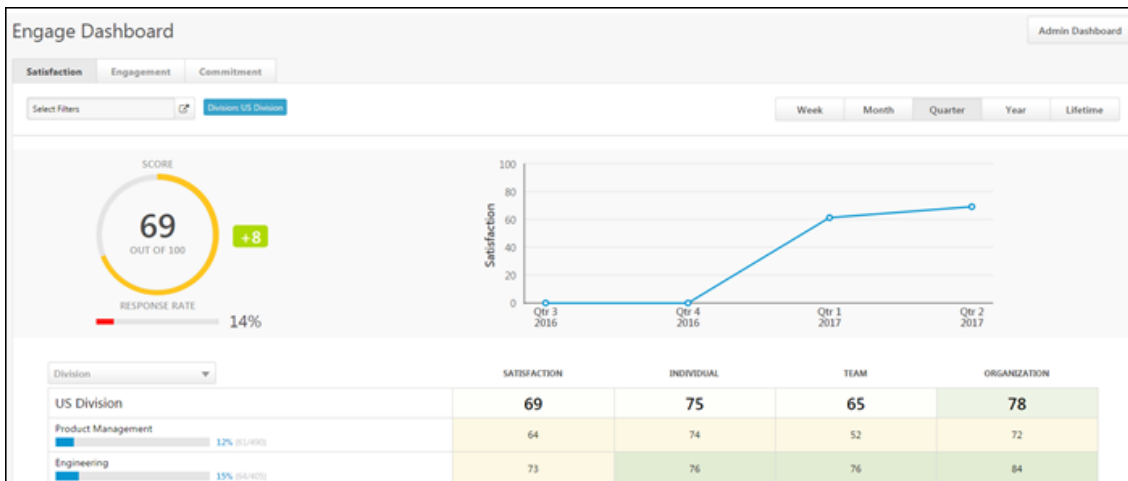
The Engage Dashboard displays a high-level view of the results of your Satisfaction, Engagement, and Commitment campaigns. A campaign is an engagement survey task which is deployed to users at a frequency and for a duration specified by the administrator who created the campaign. The goal of an engagement campaign is to ascertain employees' feelings toward various aspects of the organization, allowing the organization to gather data which can be used to increase retention, performance, and motivation. There are three types of campaigns:

- Satisfaction - Helps gauge employee satisfaction and predict employee retention
- Engagement - Helps gauge employee engagement and predict employee performance
- Commitment - Helps gauge employees' level of commitment to the organization and predict organizational citizenship behavior, which allows organizations to determine which parts of the company go above and beyond their job descriptions.

To access the Engage Dashboard, go to **ANALYTICS > ENGAGE**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage



Admin Dashboard

Click the **ADMIN DASHBOARD** button to navigate to the Engage Admin Dashboard. From this page, you can create and manage specific campaigns. [See Engage Admin Dashboard](#) on page 204 *for additional information.*

Engage Dashboard

The engage dashboard provides the average score, response rate, and overall satisfaction, engagement, or commitment of survey responders over time.

Filters

Using the filters available on the Engage Dashboard, you can filter the report results by campaign type, organizational unit, and time interval:

- **Campaign Type** - Using the tabs at the top of the page, you can filter report results by the following campaign types:
 - Satisfaction - Click this tab to view only data related to Satisfaction campaigns (selected by default).
 - Engagement - Click this tab to view only data related to Engagement campaigns.
 - Commitment - Click this tab to view only data related to Commitment campaigns.
- **Select Filters** - This filter enables you to view survey results for users in a specific division or location. Click the filter drop-down menu and choose a specific division or location from the flyout that appears (all employees selected by default).
- **Time Interval** - Using the tabs above the chart, you can filter report results by the following time intervals:
 - Week
 - Month
 - Quarter (selected by default)
 - Year
 - Lifetime

Charts

The charts on the Engage Dashboard provide a graphical representation of the following data for your selected campaign type, OU criteria, and time interval:

- **Score Wheel** - This is the average score for all of the selected campaign type's surveys over the selected time period. For example, if you have selected the Satisfaction tab and left the OU criteria set to all employees, and the Score chart shows a score of 78%, your organization's total average employee satisfaction for all time is 78%.
- **Response Rate** - This bar graph displays what percentage of users invited to respond to the campaign's survey actually provided a response.
- **Satisfaction/Engagement/Commitment Over Time** - This graph displays employees' average satisfaction, engagement, or commitment over time, depending on which campaign type you have selected. For example, if you select the Engagement campaign type, leave OU criteria set to all employees, and select the Monthly tab, you can view the average employee engagement for each of the last 12 months.

Response Demographics

Below the charts, you can view a breakdown of different employee groups, such as different divisions or locations, with more specific response data for those groups. For each employee group, the following columns display with data, if available:

- **Demographic name** - The name of the employee group, such as division, location, or all employees
- **Satisfaction/Engagement/Commitment** - The average satisfaction, engagement, or commitment percentage of the group
- **Individual/Team/Organization** - The average percentage score across driver questions for the individual, team, or organization dimensions. The questions in these dimensions are used to provide more context for Satisfaction/Engagement/Commitment data. These scores are not included in the overall score wheel calculation but can help identify outliers and major issues within the organization.

Drivers

On the bottom of the Engage Dashboard, the highest rated drivers for the selected campaign type display. Drivers are the questions that strongly impact the overall score in the Score Wheel. Driver scores can range from -100 to +100, and affect the strength of the Score Wheel percentage. Engage uses a Kendal rank correlation coefficient, also known as Kendall's tau coefficient, to calculate the driver score, which can be interpreted as a correlation. Examples:

- A driver score of +100 indicates a perfect positive correlation. As responses to that driver question rise, so does the overall score. The driver and overall score rise and fall together.
- A driver score of -100 indicates a perfect negative correlation. As responses to that driver question rise, the overall score falls. The driver and overall score rise and fall in opposition to one another.
- A driver score of 0 indicates there is no correlation between that driver question and the overall score. An employee's response to the driver question has no relation to their satisfaction, for example.

To improve the organization's Satisfaction score, focusing on strong drivers (those closest to plus or minus 100) that represent the issues most likely to impact the overall score is recommended. Questions with a low driver score (close to 0) are still worth reviewing, and depending on your company strategy, may warrant a place in action planning. However, initiatives related to weak drivers are less likely to change the overall Satisfaction score.

Clicking on a driver navigates you to the Driver Details page for the driver, allowing you to analyze the driver in greater detail. [See Driver Details](#) on page 201 *for additional information*.

Driver Details

The Driver Details page provides additional insight into specific driver questions and allows you to view a breakdown of responses and a word cloud which visually represents common response topics.

To access the Driver Details page, go to **ANALYTICS > ENGAGE** and scroll to the bottom of the Engage Dashboard page. Then, click a specific driver question.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage
View Engage Reporting	Grants ability to see the reporting dashboard, but it is limited to the user's subordinates. This permission is intended for managers.	Engage

Driver Details

Question DRIVER STRENGTH

Can you work in noisy places? 49

Question Comparison

2017 average score: 58/100

Response	Percentage
Strongly Disagree	5%
Disagree	20%
Neutral	31%
Agree	22%
Strongly Agree	22%

Legend

- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

Recent Responses

Test test	Answer
01/30/2017	01/30/2017
Following independence, Ukraine declared itself a neutral state.[15] Nonetheless it formed a limited military partnership with the Russian	The territory of modern Ukraine has been inhabited since 32,000 BC. During the Middle Ages, the area was a key centre of East Slavic culture,
01/30/2017	01/30/2017
Ukraine is a unitary republic under a semi-presidential system with separate powers: legislative, executive, and judicial branches. Its capital	Ukraine has long been a global breadbasket because of its extensive, fertile farmlands, and it remains one of the world's largest grain
01/30/2017	01/30/2017

[Show all 16 Responses](#)

Themes

[Back](#)

Question

The Question section at the top of the Driver Details page displays the driver question, along with the Driver Strength, which displays to the left of the question. The Driver Strength is used to determine the driver's overall impact on the organization's average satisfaction, engagement, or commitment score.

Question Comparison

The Question Comparison section displays the average question score for the current time period, along with a color-coded chart which graphically represents the response distribution. Each segment of the chart displays the percentage of users who chose each

response choice. The response key below the chart indicates which response corresponds with each chart color.

Recent Responses

The Recent Responses section shows six anonymized question responses, organized by most recent. Each response includes the date the response was received. To view more responses, click the page numbers.

Themes

The Themes section displays a word cloud, which displays the top words used in survey responses. The more times a specific word is used in a response to the question, the larger it appears in the word cloud. For example, if the word "customer" is the largest text size, this indicates that "customer" was the word used most often in survey responses.

Back

To return to the Engage Dashboard, click the **BACK** button. See [Engage Dashboard on page 258](#) *for additional information*.

Create New Campaign

To create a new feedback campaign, click the **CREATE NEW CAMPAIGN** button. You will be directed to the four-step campaign creation process. For more information about creating a campaign, [See **Create Campaign - Overview** on page 267 for additional information.](#)

Engage Library

To access the Engage Library, click the **ENGAGE LIBRARY** button. From the Engage Library, you can create and manage feedback surveys. For more information about the Engage Library, [See **Engage Library** on page 215 for additional information.](#)

Active Campaigns

In the Active Campaigns section, you can view all the feedback campaigns that are currently running. Each active campaign displays in its own tile, and up to two campaign tiles can display at a time. To page through additional active campaigns, you can click the navigation arrows on either side of the two displaying tiles. Each campaign tile displays the following information:

- **Name** - The campaign title
- **Owner** - The creator of the campaign
- **Type** - The feedback campaign type (Satisfaction, Engagement, or Commitment)
- **Distribution** - The method of distribution to participants (email link or mobile)
- **Invited Participants** - The number of people invited to participate in the campaign survey
- **Completion Rate** - The percentage of invited users who have completed the campaign survey
- **Recurring** - The frequency at which the campaign survey recurs and is given to users to complete again (N/A, Daily, Weekly, Monthly, Quarterly, Annually)
- **Status icon** - Indicates the current status of the campaign (Active or Draft)
- **Start Date** - The date the campaign began
- **Close Date** - The date the campaign will end and no longer be available to invited users
- **Campaign Options** - The following options may be available for different campaigns:
 - **Edit Campaign** - Allows administrators to edit aspects of the campaign. Clicking the Edit option navigates you to the campaign creation workflow, where changes can be made to the campaign. **Note:** *Some fields are read-only for campaigns in an active status.* [See **Create Campaign - Overview** on page 267 for additional information.](#)
 - **Copy Campaign** - Allows administrators to create a new campaign by copying an existing campaign. Changes can be made to the copy without impacting the original campaign. [See **Create Campaign - Overview** on page 267 for additional information.](#)
 - **Recall** - Allows administrators to recall the campaign and remove access from all invited users. The campaign will no longer be active, and the campaign survey cannot be completed by users.

- **Delete** - Allows administrators to delete a draft campaign. This option is only available for campaigns in a draft status.

Completed Campaigns

In the Completed Campaigns section, you can view campaigns that have reached their Close Date and are no longer available for users to interact with. Up to 20 completed campaigns can display on the page at a time, and additional campaigns can be viewed by clicking available page numbers. The following information displays for completed campaigns:

- **Name** - The campaign title
- **Owner** - The creator of the campaign
- **Type** - The feedback campaign type (Satisfaction, Engagement, or Commitment)
- **Launch Date** - The date the campaign was originally launched or started by the administrator
- **Close Date** - The date the campaign ended and became unavailable to users
- **Completion Rate** - A graphical representation of the percentage of invited users who completed the campaign survey

Create Campaign - Overview

Creating a campaign allows you to send a survey to users at a selected frequency, which enables you to gather data on employee satisfaction, engagement, and commitment on an ongoing basis. Response trends over time allow organizations to make informed decisions and ensure they are fostering a positive and productive workplace.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Create New Campaign

The campaign creation process includes four steps:

1. General - See **Create Campaign - General** on page 208 *for additional information*.
2. Survey - See **Create Campaign - Survey** on page 210 *for additional information*.
3. Invitation - See **Create Campaign - Invitation** on page 271 *for additional information*.
4. Launch - See **Create Campaign - Launch** on page 213 *for additional information*.

Cancel

At any point during the creation process, you can click the **CANCEL** button to close out of the campaign creation process without saving any of the data you have input. Any configurations you have made will be discarded.

Save Draft

At any point during the creation process, you can click the **SAVE DRAFT** button to save a draft version of the campaign you are creating. The selections you have made will be saved, and you can access the draft when you are ready to make more changes from the Engage Admin Dashboard page.

Create Campaign - General

The General step of the campaign creation process allows you to input basic information about the campaign, such as its name, the campaign type, how it will be distributed to users, and how often it will be deployed.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

General

Configure the following General Settings:

- **Campaign Name** - Enter a name for the campaign.
- **Internal Description** - Provide a description of the campaign's purpose. This description will only be visible to other administrators.
- **Privacy** - Currently, the **Privacy** field is set to On and cannot be changed. This field reminds the administrator that campaigns are confidential, meaning responses are

anonymized. The responses of individual survey participants cannot be recovered. With a future release, it will be possible to turn the **Privacy** setting off, if necessary.

- **Campaign Type** - Select the campaign type from this drop-down menu. Available choices include:
 - Satisfaction
 - Engagement
 - Commitment
- **Campaign Distribution** - Select the distribution method for the survey. Available choices include:
 - Email Link - If selected, users will be provided access to the survey via a link in an email.
 - Mobile - If selected, users will be provided access to the survey via a mobile application.
- **Availability** - From the **Availability** field, choose which users will receive the survey. You can either select a division or a location organizational unit (OU). **Note:** *When a division or location is selected, all of the OU's subordinate OUs are automatically included in the availability as well.*
- **Launch Date** - Select the date and time at which the campaign survey will be deployed to users. Click the Date icon to select a specific date. Click the Time icon to select a specific time. **Note:** *The date and time selected must be in the future.*
- **Campaign Frequency** - If desired, enable recurrence for the campaign by toggling the Campaign Frequency switch to the On position. If a campaign is set to recur, it will be redeployed to users at a frequency you specify. **Note:** *Availability is recalculated with each recurrence. Only those employees eligible to receive a survey on the day of each launch will be included.* To specify a frequency, after enabling recurrence, select one of the following frequencies:
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Annually
- **Close Date** - Select the date and time at which the campaign survey will close and no longer be available to users. Click the Date icon to select a specific end date. Click the Time icon to select a specific time.

Next

After populating and selecting all the General Settings, click the **NEXT** button to advance to the Survey step. See **Create Campaign - Survey** on page 210 *for additional information.*

Create Campaign - Survey

The Survey step of the campaign creation process allows you to select the feedback survey which will be sent to users. You must create the survey you wish to use before creating the campaign. See [Engage Library](#) on page 215 for additional information.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Survey

The survey selected on this page will be sent to users when the campaign is deployed. Only one survey can be selected per campaign. To select a survey:

1. Click the **SELECT SURVEY** button. The Add Survey pop-up window appears.
2. Select the radio button next to the survey you want to associate with this campaign.
3. Click the **SAVE** button at the bottom of the pop-up window.

If needed, you can click the **CHANGE SURVEY** button to pick a different survey.

Next

After populating and selecting all the General Settings, click the **NEXT** button to advance to the Invitation step. See [Create Campaign - Invitation](#) on page 271 for additional information. **Note:** To return to a previous step in the campaign creation process, you can click the **BACK** button.

Create Campaign - Invitation

On the Invitation step of the campaign creation process, configure the email options for you campaign if the survey will be accessed via an email link. If you opted to deploy the campaign only via Mobile during the General step of the campaign creation process, the Invitation step is SKIPPED. Email options can only be configured for surveys being deployed to users via email. If the campaign is being deployed via mobile application, you will be navigated from the Survey step to the Launch step. [See Create Campaign - Launch on page 213 for additional information.](#)

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

CREATE CAMPAIGN

- General
- Survey
- Invitation**
- Launch

Email Invitation

Invitation From:

Tags:

Invitation Subject:

Invitation Body:

To our valued employees,

 Your work satisfaction is important to us! Please take a few moments this quarter to let us know how you feel about working here so we can keep making ABC better and better!

Email Reminder

Start sending reminders: days after launch

Frequency:

Stop sending reminders: days after launch

Reminder From:

Reminder Subject:

Reminder Body:

There's still time to share your workplace satisfaction feedback with ABC! Please take a few moments today to complete a quick survey and let us know how we can keep making ABC a great place to work!

Email Invitation

Configure the following settings for the initial email users will receive:

- **Invitation From** - Enter the email address which will appear as the From address when users receive the email invitation.
- **Tags** - Click the tags search icon to see a list of tags which can be used in an Engage campaign invitation. Tags are replaced with specific user information. For example, the tag RECIPIENT.FIRST.NAME is replaced with the user's actual first name when they receive the email.
- **Invitation Subject** - Enter the subject of the email users will receive.
- **Invitation Body** - Enter the body of the email users will receive. Let users know why their feedback is important, and use tags if needed. The email will also automatically include a link to the survey you have added to the campaign.

Email Reminder

To configure a reminder email, toggle the **Email Reminder** switch to the On position. Then, configure the following email reminder options:

- **Start sending reminders** - Enter the number of days after the campaign launch that a first reminder email will be sent to users.
- **Frequency** - Specify the frequency at which reminders will be sent. Available frequency options include:
 - Once
 - Weekly
 - Monthly
- **Stop sending reminders** - Enter the number of days post-launch after which email reminders will no longer be sent.
- **Reminder From** - Enter the email address which will appear as the From address when users receive the email reminder.
- **Reminder Subject** - Enter the subject of the email users will receive.
- **Reminder Body** - Enter the body of the email users will receive. Let users know why their feedback is important, and use tags if needed. The email will also automatically include a link to the survey you have added to the campaign.

Next

After populating and selecting all the Invitation settings, click the **NEXT** button to advance to the Launch step. *See **Create Campaign - Launch** on page 213 for additional information. See **Create Campaign - Invitation** on page 271 for additional information.*

Note: *To return to a previous step in the campaign creation process, you can click the **BACK** button.*

Create Campaign - Launch

On the Launch step, review the campaign settings and either launch the campaign or save it as a draft to launch later.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

CREATE CAMPAIGN

- General
- Survey
- Invitation
- Launch

Review Campaign

Campaign: Employee Satisfaction 2017
 Survey: Satisfaction Survey
 Privacy: Confidential
 Campaign Type: Satisfaction
 Distribution: Email link
 Availability: Division: All employees
 Launch Date: 01/01/2017 12:39:15 PM
 Close Date: 12/31/2017 12:39:15 PM
 Recurring: Quarterly
 Invitation:
 To our valued employees,

Your work satisfaction is important to us! Please take a few moments this quarter to let us know how you feel about working here so we can keep making ABC better and better!

Reminder: Enabled

Launch Campaign

Launch Campaign queues your campaign and any applicable invitations. Only select Launch Campaign when your campaign is configured and ready to send.

Review Campaign

In the Review Campaign section, review the campaign configurations and check for accuracy. If a change is needed, you can click the **BACK** button at the bottom of the page to return to previous steps.

Launch Campaign

When the campaign is correctly configured and ready to deploy, click the **LAUNCH CAMPAIGN** button. The survey and associated communications will be sent to users according to your campaign settings.

Save Draft

To save your campaign without yet deploying, click the **SAVE DRAFT** button. The campaign settings will be saved and can be accessed later from the Engage Admin Console. When the campaign is ready, you can return to the campaign creation process for the campaign and click the **LAUNCH CAMPAIGN** button on the Launch step.

Engage Library

In the Engage Library, you can manage and create surveys, dimensions, and questions which are used in feedback campaigns. Manage each of these items by clicking the corresponding tab at the top of the page.

To access the Engage Library, go to **ANALYTICS > ENGAGE** and click the **ENGAGE ADMIN DASHBOARD** button. Then, click the **ENGAGE LIBRARY** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Engage Library

Create Survey

Surveys

Dimensions

Questions

Use the search tool to search for Surveys. You can remove any Surveys which have not already been included in a campaign and you can inactivate any Surveys which should not be added to a campaign in the future.

All Types
Active
Survey

1
2
3

1 to 20 of 41

Survey	ID	Type	Author	Mobile	Active	Options
Satisfaction Survey	1	Satisfaction	Shobhi P	No	Yes	▼
Engagement Survey	2	Engagement	Shobhi P	No	Yes	▼
Commitment Survey	3	Commitment	Shobhi P	No	Yes	▼

Surveys

By default, when you navigate to the Engage Library page, the Surveys tab is selected. The Surveys tab allows you to create and manage the surveys which can be attached to feedback campaigns. Surveys must be created before you can create a campaign, but survey questions must first be created in order to build a survey. See the Questions section below.

When the Surveys tab is selected, you can search for existing surveys using the Search bar. You can also filter existing surveys by the following criteria:

- **Survey Type** - Allows you to select a survey type and view only surveys of that type. Available types include:
 - Satisfaction
 - Engagement
 - Commitment

- **Status** - Allows you to filter for Active or Inactive surveys
- **Survey Criteria** - Allows you to sort the survey search results by Survey name or Survey ID

In the survey table, up to 20 existing surveys display. You can access additional search results by clicking the search result page numbers. Existing surveys display with the following information:

- **Survey** - The name of the survey
- **ID** - The ID number of the survey
- **Type** - The type of survey (Satisfaction, Engagement, or Commitment)
- **Author** - The administrator who created the survey
- **Mobile** - Displays whether or not the survey is a mobile survey (Yes or No)
- **Active** - Displays whether or not the survey is currently active (Yes or No)
- **Options** - Allows you to manage surveys using the following options, if available:
 - **Edit** - Allows you to make changes to the survey. Keep in mind that the changes you make impact any currently running feedback campaigns. Some fields cannot be changed.
 - **Delete** - Allows you to delete a survey. This option is only available for surveys which are not yet associated with a campaign.

To create a new survey, click the **CREATE SURVEY** button in the upper-right corner of the page. See [Create Survey](#) on page 218 for additional information.

Dimensions

The Dimensions tab allows you to view the system dimensions, which are used to organize your survey questions and control the reporting dashboard aggregation. Satisfaction, Engagement, and Commitment dimensions aggregate to the corresponding reporting tabs and are used to calculate overall scores and trend lines. Individual, Team, Organization, and Open Ended dimensions contain questions that do not directly measure Satisfaction, Engagement, and Commitment, but instead provide context to better understand overall scores. These dimensions include the Driver questions.

Note: *It is not currently possible to create new dimensions. This functionality will be made available in a future release.*

When the Dimensions tab is selected, you can search for existing dimensions using the Search bar. You can also filter existing dimensions by the following criteria:

- **Status** - Filter by active or inactive dimensions
- **Dimension Criteria** - Allows you to sort the dimension search results by dimension name or dimension ID.

In the dimensions table, each existing dimension displays with the following information:

- **Dimension** - The name of the dimension
- **ID** - The ID number of the dimension

- **Author** - The creator of the dimension
- **Active** - Displays whether or not the dimension is active (Yes or No)

Questions

The Questions tab allows you to create and manage the questions which can be used in surveys. Survey questions must first be created in order to build a survey.

When the Surveys tab is selected, you can search for existing surveys using the Search bar. You can also filter existing surveys by the following criteria:

- **Dimension**- Allows you to select a dimension and view only questions associated with that dimension. Available dimension choices depend on what dimensions you have created via the Dimensions tab
- **Status** - Allows you to filter for Active or Inactive questions
- **Question Criteria** - Allows you to sort the question search results by Question name or Question ID

In the survey table, up to 20 existing questions display. You can access additional search results by clicking the search result page numbers. Existing questions display with the following information:

- **Question** - The name of the question
- **Type** - The type of the question (smiley or open-ended)
- **ID** - The ID number of the question
- **Dimension** - The dimension associated with the question
- **Language** - The language selected for the question
- **Author** - The creator of the question
- **Active** - Whether or not the question is currently active (Yes or No)
- **Options** - Allows you to manage existing questions using the following options, if available:
 - **Edit** - Allows you to make changes to existing questions. Some fields cannot be changed if the question is being used in a survey. You will receive a warning if the question is being used in a survey.
 - **Delete** - Allows you to delete a question. This option is only available for questions which are not yet being used in a survey.

To create a new question, click the **CREATE QUESTION** button in the upper-right corner of the page. [See Create Question](#) on page 220 *for additional information*.

Create Survey

Once created, surveys can be associated with feedback campaigns and sent to users to help the organization gain valuable insight into employee views. Before creating a survey, it is necessary to create all the questions that will be contained in the survey via the Questions tab. [See Create Question on page 220 for additional information.](#)

To create a new survey, go to **ANALYTICS > ENGAGE** and click the **ENGAGE ADMIN CONSOLE** button. Next, click the **ENGAGE LIBRARY** button. Then, select the Surveys tab and click the **CREATE SURVEY** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Create Survey

General Settings

Survey Name

Internal Description

Default Locale English (US) ▼

Participant Instructions ✕

Survey Type Satisfaction ▼

Mobile Pulse

Active

Add Pages

Add Page
Cancel
Save

General Settings



First, configure the following general settings for the new survey:

- **Survey Name** - Enter a descriptive name for the survey.
- **Internal Description** - Enter a description for the survey which is visible only to administrators.
- **Default Locale** - Select the language of the survey from the drop-down menu.
- **Participant Instructions** - Enter instructions explaining how to complete the survey, which will be visible to users who receive the survey via a campaign.
- **Survey Type** - Select the survey type from the drop-down menu (Satisfaction, Engagement, Commitment)
- **Mobile Pulse** - Mobile Pulse surveys are specifically designed for distribution within the Mobile app. They are limited to a maximum of 5 questions, and no more than 1 question per page. To enable this survey for use with the Mobile app, toggle the switch to the On position.
- **Active** - The Active switch is turned on by default, and renders the survey active and available for use in campaigns immediately after the survey is saved. To save a survey without activating it, toggle this switch to the Off position.

Add Pages

After the general settings have been configured, add survey pages and then add questions to your pages. If you build a survey with multiple pages, users will navigate through multiple survey pages when completing the survey. For example, if you build a survey with three pages, and there are four questions on each page, the user will need to click **NEXT** after answering each set of four questions.

To build the structure of your survey:

1. Click the **ADD PAGE** button. A section labeled Page 1 appears.
2. Click the **ADD QUESTIONS** button which appears below the section. A pop-up window with available questions appears.
3. Check the boxes of the questions you want to include in this survey section. You can search for and filter for specific questions using the search function and filtering criteria. You can also navigate to additional pages of search results by clicking the page numbers. After choosing at least one question, you can click the Selected tab to view only the questions you have selected.
4. Click the **ADD** button after all questions for the section have been selected. The questions appear in under Section 1, along with their associated dimension and response type. Using the Options column, you can either delete questions using the Delete icon , or you can drag and drop questions into a different display order by clicking and dragging the Reorder icon .
5. Continue adding additional sections and questions as needed, using the same process.

Save

Click the **SAVE** button to save the new survey. The survey will be added to the Surveys tab of the Engage library, and if saved in an active state, the survey will be available for use with campaigns. [See Create Campaign - Overview](#) on page 267 *for additional information*. To leave the survey creation page and discard all configurations, click the **CANCEL** button.

Create Question

Two different types of questions can be created for use in Engage surveys: Smiley questions and open-ended questions. Smiley questions allow users to rate their general feelings about various issues, using a Likert scale which associates responses with emoticons rather than numbers. Open-ended questions allow users to provide text responses.

To create a new question, go to **ANALYTICS > ENGAGE** and click the **ENGAGE ADMIN CONSOLE** button. Next, click the **ENGAGE LIBRARY** button. Then, select the Questions tab and click the **CREATE QUESTION** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Smiley

To create a Smiley question, select the **Smiley** option from the **Question Type** drop-down menu. Then, configure the following options for the question:

- **Dimension** - Select the dimension with which this question should be associated. Dimensions must be created prior to creating questions. [See Create Dimension.](#)
- **Allow Comments** - To allow users to provide comments for their question response, toggle this switch to the On position.
- **Active** - The Active switch is turned on by default, and renders the question active and available for use in surveys immediately after the question is saved. To save a question without activating it, toggle this switch to the Off position.
- **Question Text** - Enter the question or statement you want users to respond to. This field can be localized into other languages using the Globe icon.
- **Default Locale** - Select the applicable language for the question from this drop-down menu.
- **Response Options** - Configure the Likert scale responses, with corresponding emoticons, for the question. Ensure that the question being asked can be responded to using the response options you have provided, and ensure the emoticons correspond with the nature of the responses. The user can only see these descriptions by hovering over the smiley face icons in the survey. These fields can be localized into other languages by clicking the Globe icon. By default, the available response options are:
 - Strongly Disagree
 - Disagree
 - Neutral
 - Agree
 - Strongly Agree

After configuring the question, click the **SAVE** button to add the question to the Questions library. The question will then be available for use with surveys. To discard the question you have created without saving it, click the **CANCEL** button at the bottom of the page.

Create Question

Question Type	<input type="text" value="Smiley"/>
Dimension	<input type="text" value="Satisfaction"/>
Allow Comments	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Question Text	<input style="width: 90%;" type="text"/>
Default Locale	<input type="text" value="English (US)"/>
Response Options	<input type="text" value="☹ Strongly Disagree"/> <input type="text" value="☹ Disagree"/> <input type="text" value="☺ Neutral"/> <input type="text" value="☺ Agree"/> <input type="text" value="☺ Strongly Agree"/>

Open Ended

To create an open-ended question, select the **Open Ended** option from the **Question Type** drop-down menu. Then, configure the following options for the question:

- **Dimension** - Select the dimension with which this question should be associated. Dimensions must be created prior to creating questions. [See Create Dimension.](#)
- **Allow Comments** - This field is grayed out and cannot be modified for Open Ended questions.
- **Active** - The **Active** switch is turned on by default, and renders the question active and available for use in surveys immediately after the question is saved. To save a question without activating it, toggle this switch to the Off position.
- **Question Text** - Enter the question you want users to respond to. Users will be able to provide an open-ended text response for this question. This field can be localized into other languages using the Globe icon.
- **Default Locale** - Select the applicable language for the question from this drop-down menu.

After configuring the question, click the **SAVE** button to add the question to the Questions library. The question will then be available for use with surveys. To discard the question you have created without saving it, click the **CANCEL** button at the bottom of the page.

Create Question

Question Type	<input type="text" value="Open Ended"/>
Dimension	<input type="text" value="Open Ended"/>
Allow Comments	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Question Text	<input type="text"/>
Default Locale	<input type="text" value="English (US)"/>

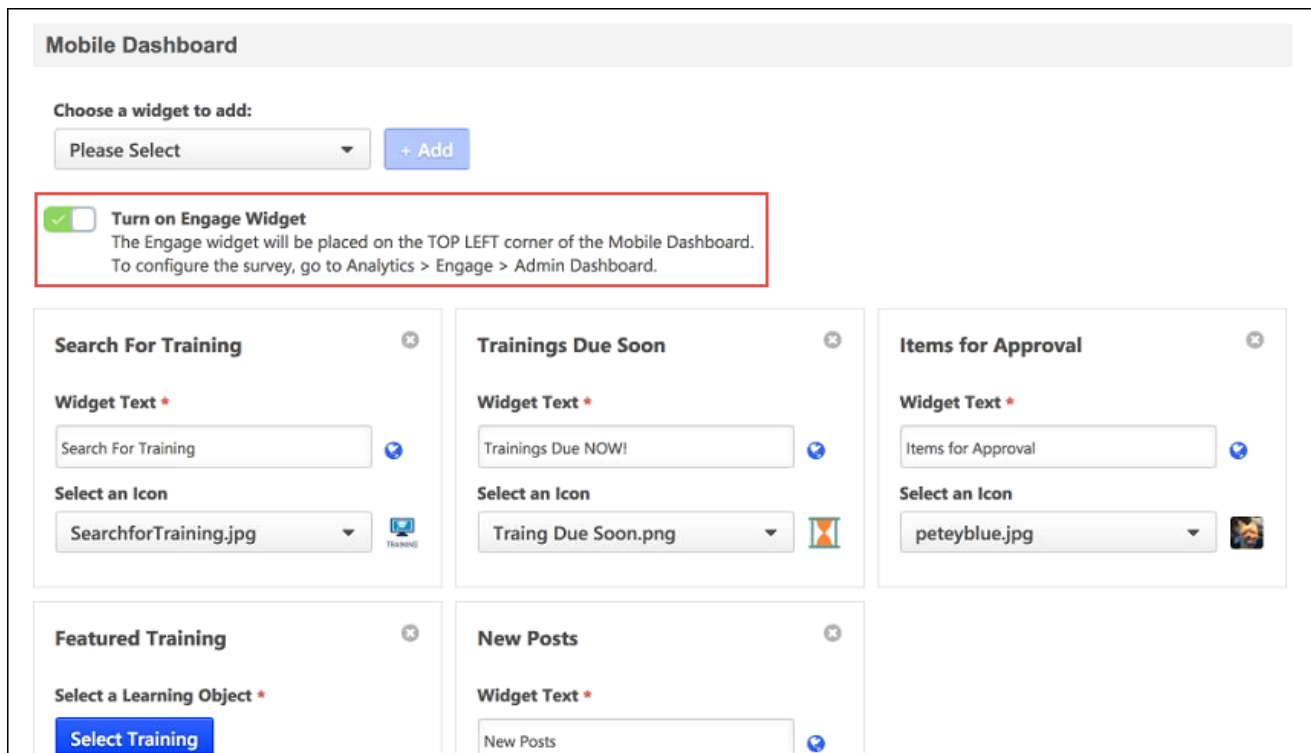
Enable Mobile Widget - Engage

When creating a campaign, administrators can configure the survey associated with the campaign to be deployed via email or the mobile app. In order for users to access Engage surveys via the Mobile app, the Engage widget must be enabled on the Mobile Dashboard via Mobile Preferences.

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



Mobile Dashboard

To add the Engage widget to the Mobile Dashboard:

1. Click the **Please Select** drop-down menu in the Mobile Dashboard section of the Mobile Preferences page.
2. Select the **Engage Widget** from the menu.
3. Click the **ADD** button. This causes the **Turn on Engage Widget** toggle to appear.
4. Switch the **Turn on Engage Widget** toggle to the On position.

5. Click the **SAVE** button at the bottom of the Mobile Preferences page. The Engage widget will be available to mobile users after saving.

Engage Survey - End User Experience


After a campaign with the **Email Link** setting enabled has been launched, users who have been invited to provide feedback receive an email inviting them to share their feedback. The email displays the subject and email body configured by the campaign creator, along with a link to the associated survey. **Note:** *Users must have the end user permission to receive an Engage survey invitation in order to receive the email.*

After a campaign with the Mobile setting enabled has been launched, the survey becomes available to users with the appropriate permission via the Mobile app dashboard. **Note:** *The Engage widget must be enabled for the Mobile Dashboard in order for mobile users to access surveys. See **Enable Mobile Widget - Engage** on page 283 for additional information.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage

End User View - Email



Tue 5/23/2017 2:40 PM

HRAdmin@abc.com

Share your feedback with ABC Corp!

To ■ Lindsey Pauley

To our valued employees,

Your work satisfaction is important to us! Please take a few moments this quarter to let us know how you feel about working here so we can keep making ABC better and better!






[Click here to provide feedback](#)

When the user accesses the survey via an email link, they can provide responses to the survey questions. For Smiley type questions, users select the emoticon which best describes their reaction to a question. For Open Ended type questions, users provide a free-form text response. If a survey has multiple pages, users can click the **NEXT** button to advance to the next page. After reaching the end of the survey, users can click the **SUBMIT** button to submit their responses.

Survey Name






Question 1

How do you feel today?






Question 2

How do you like today's meeting?

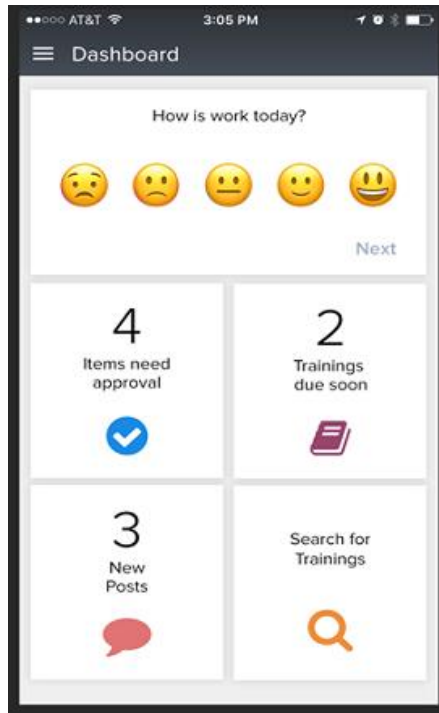
Question 3

Do you prefer working from home?

End User View - Mobile

When the user accesses the survey via the Mobile app, they can provide responses to the survey questions. For Smiley type questions, users select the emoticon which best describes their reaction to a question. For Open Ended type questions, users provide a free-form text response. Only one question can display per page on the Mobile app. Users can press the **NEXT** button to advance to the next question. After reaching the end of the survey, users can press **SUBMIT** to submit their responses.



Mobile Engage Widget

Mobile Engage Widget - Overview

The Engage survey platform was released in June 2017, which allows companies to regularly survey their employees for levels of satisfaction, engagement, and commitment. Engage surveys could be completed by employees via desktop computers.

With this enhancement, a mobile widget for Engage surveys is available on the Cornerstone mobile application, allowing users to quickly access company surveys using their mobile devices.

The Engage module was released after the Cornerstone Convergence event on June 6, 2017. [See Engage - Overview](#) on page 255 for additional information.

Use Case

Kim is the VP of talent at ACME Co and wants to gauge the moods of ACME employees on a daily basis so she can measure team morale across different departments over time. She enables the Engage tool for specific divisions, the Development team being one of them.

Now Isadora, an employee on the Development team, sees an Engage widget on her mobile app every day at 5pm. At this time, she can indicate her current mood using the Engage widget on her Mobile Dashboard. Isadora can also send random feedback to HR about things that would make the team happier, such as a larger budget for team outings or more feedback from executive staff.

Implementation

This functionality is automatically available for the Cornerstone Mobile application for organizations using the Engage module. Administrators can enable the Engage widget via Mobile Preferences.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage
Mobile Dashboard Administrator	Allows system admins to create/ updated and delete widgets.	Mobile

Manage Mobile Engage Widget

With this release, the Engage widget is automatically available for portals using the Engage module and the Mobile application. The widget is configurable via the Mobile Dashboard Preferences page. Administrators with the appropriate permission can disable or enable the widget at any time.

To access Mobile Preferences, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > MOBILE DASHBOARD**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Mobile Dashboard Administrator	Allows system admins to create/ updated and delete widgets.	Mobile

Mobile Dashboard

Choose a widget to add:
 Please Select + Add

Turn on Engage Widget
 The Engage widget will be placed on the TOP LEFT corner of the Mobile Dashboard.
 To configure the survey, go to Analytics > Engage > Admin Dashboard.

Search For Training ✕

Widget Text *

 🔍

Select an Icon

 📁

Trainings Due Soon ✕

Widget Text *

 🔍

Select an Icon

 📁

Items for Approval ✕

Widget Text *

 🔍

Select an Icon

 📁

Featured Training ✕

Select a Learning Object *

New Posts ✕

Widget Text *

 🔍

Mobile Dashboard

To enable the Engage widget on the Mobile Dashboard:

1. On the Mobile Dashboard preferences page, toggle the Turn On Engage Widget switch to the on position.
2. Click the **SAVE** button at the bottom of the Mobile Preferences page. The Engage widget will be available to mobile users after saving.

Engage Widget - End User View

After an Engage survey campaign with the Mobile setting enabled has been launched, the survey becomes available to users with the appropriate permission via the Mobile app dashboard. **Note:** *The Engage widget must be enabled for the Mobile Dashboard in order for mobile users to access surveys.*

See **Manage Mobile Engage Widget** on page 290 for additional information.

See **Create Campaign - Overview** on page 267 for additional information.

Permissions

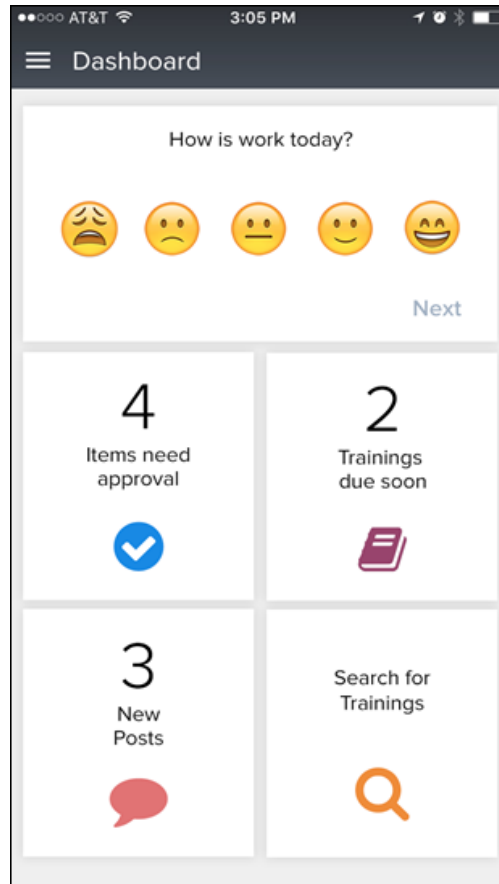
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage Respondent	Limits who can receive an invitation to complete a survey. Useful for progressive roll-out across the organization. Allows customization by employee type (e.g. only enable for active, full time employees). This is an end user permission.	Engage

End User View - Mobile

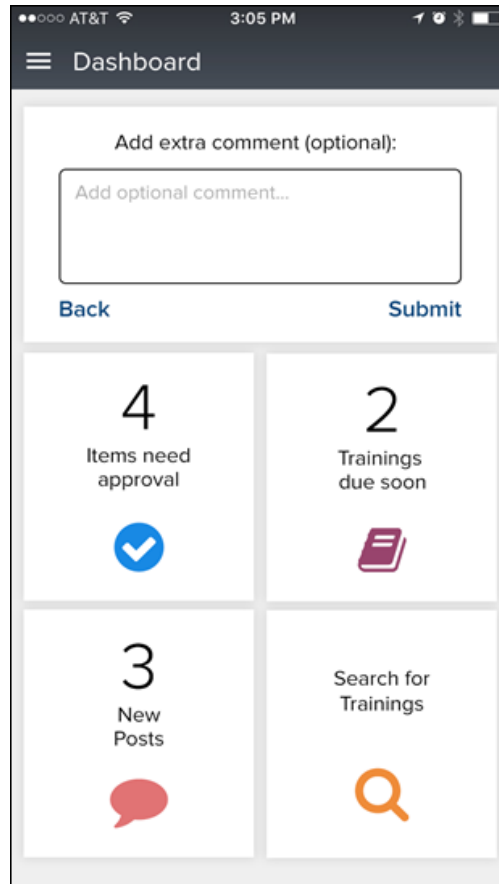
Available Engage surveys display to users in the Engage widget, which is located at the top of the Mobile Dashboard when the user accesses the Mobile application. If the user taps the widget, they can answer survey questions. **Note:** *If no Engage surveys are currently available to the user, the widget displays, "0 Surveys."*

Two types of questions are available for Engage Surveys:

Mood Selection - For Mood Selection questions, users select the emoticon which best describes their reaction to a question. Only one question can display per page on the Mobile app. Depending on how the administrator configured the Mood Selection question, the user may have the option to provide a comment explaining their selection.



Open Ended Questions - For Open Ended type questions, users provide a free-form text response to a question.



Users can press the **SUBMIT** button to advance to the next question. For mood questions that include an optional comment, user will see **NEXT** button instead of **SUBMIT** at the mood question page. Only one question displays per page. If there are no more questions available to the user, user sees '0 Surveys'

Learning

Catalog Connector API - AICC Course Integration with LCMS Vendors

Catalog Connector API - AICC Course Integration with LCMS Vendors - Overview

Prior to this enhancement, when learning administrators needed to add online courses from a 3rd party vendor to their learning management system (LMS), it was necessary to export courses from the vendor first and then upload them to the LMS.

With this enhancement, a streamlined course loader API is available for transferring content automatically between content vendors and the Cornerstone platform. With this API, 3rd party AICC courses are automatically synchronized to the course catalog, and the administrators do not need to manually upload them to the system.

Use Case

Jennifer is a learning administrator at ACME Co, where she is responsible for uploading and managing content to their LMS. Her company uses a 3rd party vendor to create and store online courses prior to publishing them in the LMS.

Because the vendor ACME uses supports the Cornerstone Catalog Connector API and also initiated the integration for it, Jennifer does not need to export the vendor's content and upload it to the system herself. On a daily basis, courses that are ready to be published are automatically synchronized and published to the LMS. Once synchronized, Jennifer can access and manage the courses from the Course Catalog.

Considerations

- The Catalog Connector integration requires the 3rd party vendor to support the Catalog Connector API. Provided API specifications will allow 3rd party LCMS and AICC vendors to be compliant with Cornerstone API for seamless integration.
- Only online courses in AICC format can be synchronized using the Catalog Connector API.

Implementation

This functionality is NOT automatically enabled for the Learning module. It must be requested from Global Product Support. There is no additional cost associated with this enhancement. The Catalog Connector API can be used with 3rd party content vendors which support the Catalog Connector API.

To set up an integration with a vendor, contact Global Product Support and provide the following information:

- Integration Name - The name of the integration
- Provider Name - An existing system Provider
- Provider URL - The Provider URL, as provided by the 3rd party vendor
- Authentication URL - The vendor's authentication URL, as provided by the 3rd party vendor
- Client ID - The client ID, as provided by the 3rd party vendor.

- Client Secret Key - The client key code, as provided by the 3rd party vendor
- Sync Time - The time at which online courses should be automatically published and synched from the vendor each day

Once Global Product Support registers the vendor, the integration is ready for use.

Permissions

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 and also grants access to the Course Console, where LOs can also be managed/edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). 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 Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.</p>	Learning - Administration
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and 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).. 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.</p>	Learning - Administration
Course Publisher Update	<p>Grants ability to update existing online training courses previously published via the course publisher. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator permission.</p> <p>With the Oct '17 release, after the Content Publisher is activated in the system, users with this permission are automatically granted the permission to modify online classes.</p>	Learning - Administration

<p>Course Publisher</p>	<p>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.</p> <p>With the Oct '17 release, after Content Publisher is activated in the system, users with this permission are automatically granted the permissions to upload and publish online classes via the Content Publisher, and also the permission to view the Upload History page.</p>	<p>Learning - Administration</p>
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Catalog Connector - Updated Courses

Via the Catalog Connector API, online courses from integrated 3rd party vendors are automatically published and synced in the learning management system (LMS) on a daily basis, at a scheduled time. Administrators can verify that the courses were successfully published by navigating to the Upload History page (beta only), the Course Catalog, or the Course Console.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	<p>Grants ability to manage/edit learning objects listed in the Course Catalog and also grants access to the Course Console, where LOs can also be managed/edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). 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 Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.</p>	Learning - Administration
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and 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).. 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.</p>	Learning - Administration
Course Publisher Update	<p>Grants ability to update existing online training courses previously published via the course publisher. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator permission.</p> <p>With the Oct '17 release, after the Content Publisher is activated in the system, users with this permission are automatically granted the permission to modify online classes.</p>	Learning - Administration

<p>Course Publisher</p>	<p>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.</p> <p>With the Oct '17 release, after Content Publisher is activated in the system, users with this permission are automatically granted the permissions to upload and publish online classes via the Content Publisher, and also the permission to view the Upload History page.</p>	<p>Learning - Administration</p>
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Upload History

To access the Upload History page, go to ADMIN > TOOLS > LEARNING and click the **Upload History** link. **Note:** *This page is only available in Stage portals as beta functionality.*

To verify that courses from a 3rd party vendor have been successfully published and synced in the LMS, search the Upload History page for the uploads from the 3rd party vendor. The name of the auto-sync item follows the following naming convention: AutoSync <Integration Name>.

Uploads display with their current status. If the upload shows a status of Completed Successfully, the 3rd party vendor's courses have been successfully uploaded and synced in the system, and can be managed via Course Catalog or Course Console. If the upload is in a status of Upload Failed, Partially Uploaded, or Completed with Comments, click the **View Errors** link in the Action column to view additional information about the upload and determine what steps are necessary to facilitate a successful upload.

NAME	DATE	OWNER	STATUS	PUBLISH STATE	ACTION
Bribery Awareness Module	2/28/2017 4:58 PM	Cornerstone Admin	Completed With Comments	Published	
Anti-Money Laundering Video Plus	2/28/2017 4:54 PM	Cornerstone Admin	Completed With Comments	Published	View Errors
Age Module	2/28/2017 4:53 PM	Cornerstone Admin	Completed With Comments	Published	
BigThink-Creativity and Innovation	2/28/2017 4:47 PM	Cornerstone Admin	Completed	Published	
BigThink-Client Focus	2/28/2017 4:45 PM	Cornerstone Admin	Completed	Published	
BigThink-Adaptability	2/28/2017 4:44 PM	Cornerstone Admin	Completed	Published	

Course Catalog

To access the Course Catalog, go to ADMIN > TOOLS > LEARNING > CATALOG and click the **Course Catalog** link. After 3rd party online courses have been synched via the Catalog Connector API, administrators can search for and manage the online courses through the Course Catalog. If a course has been successfully published via the Catalog Connector, its

metadata, such as title, keywords, availability, etc. can be edited via the Course Catalog or the Course Console. Click the Edit option in the Options menu on the Course Catalog search page to edit the course using Course Catalog. To edit the course via the Course Console, see below.

Course Catalog

Online Class ▼
Search

[Refine search](#)

Published ▼
Active ▼
By Title ▼
 Show Courses with Recurrence

<input checked="" type="checkbox"/>	Title	Provider	Version	Language	Created Date	Modified Date	Actions
<input checked="" type="checkbox"/>	2017 AML Test - Operations - Canada	GoToMeeting	1.0	English (US)	6/2/2017	6/2/2017	▼
<input checked="" type="checkbox"/>	Creating Effective Team Goals	GoToMeeting	2.0	English (US)	5/23/2017	5/23/2017	▼


Course Console

To access the Course Console, go to **ADMIN > TOOLS > LEARNING > CATALOG** and click the **Course Catalog** link. Then, search for the 3rd party vendor course you wish to manage and click the training title on the Course Catalog search page. This opens the Course Console page for the training, where you can modify metadata for the course using the Course Console inline editing feature.

🏠 > Catalog > Course Console

Creating Effective Team Goals ☆

Provider GoToMeeting	Price \$0.00
Training Hours 0 Hours, 0 Minutes	Credits 0
Mobile Off	Exclude from Recommendations Off
Subjects N/A	
Available Languages English (US)	
Keywords N/A	
Description Edit	
N/A	



- Online Class
- 2.0
- ⏻ Active
- 🗓 N/A
- ☆ 0 (0 Reviews)
- ⚙ [See Training Units](#)

Content Security Enhancements

Block Upload of Flash-based Courses

Prior to this enhancement, it was not possible to prevent administrators from uploading Flash-based courses to the learning management system (LMS).

With this enhancement, it is possible to control whether or not the LMS permits the upload of Flash-based courses.

Implementation

The backend setting which prohibits administrators from uploading Flash-based courses to the LMS is NOT enabled by default. To enable this functionality, please contact Global Product Support. There is no additional cost associated with this enhancement.

When this setting is enabled, administrators are NOT able to successfully load Flash-based courses to the system.

SCORM 1.2 ID Encryptions

Prior to this enhancement, the SCORM 1.2 session ID for online courses could not be encrypted.

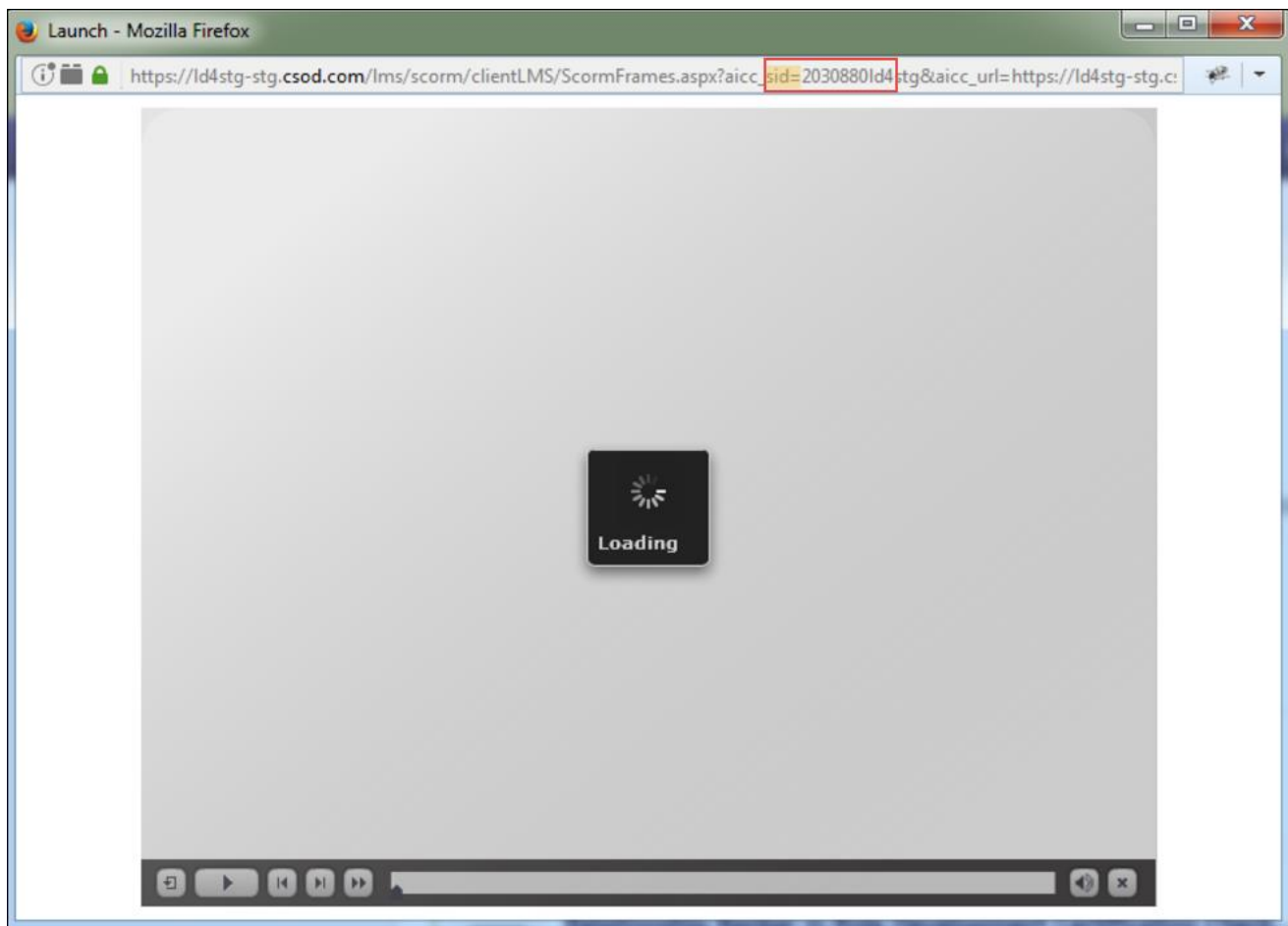
With this enhancement, the SCORM 1.2 session ID for online courses can be automatically encrypted upon configuration.

Implementation

For existing learning portals, if AICC ID encryption is already enabled in the portal, the session IDs of SCORM 1.2 courses are also automatically encrypted, following this enhancement. If AICC ID encryption was NOT enabled in the portal prior to this enhancement, SCORM 1.2 session ID encryption is NOT automatically enabled in the portal and must be enabled via a case submission to Global Product Support. There is no additional cost associated with this enhancement.

For new learning portals, SCORM 1.2 session ID encryption IS automatically enabled.

When the backend setting for SCORM 1.2 session ID encryption is enabled, the session ID of SCORM 1.2 courses is automatically encrypted, and the encrypted value of the session ID is visible in the URL for the launched online course.



Create Child Sessions Permission

Prior to this enhancement, in portals where the backend setting to allow multiple providers is enabled, users with the permission to view instructor-led training (ILT) sessions were also able to create child sessions.

With this enhancement, in portals where the backend setting to allow multiple providers is enabled, users with the permission to view ILT sessions can NOT create child sessions for a provider unless they also have the new permission to create child sessions. Users who only have the permission to view sessions are limited to a read-only view of ILT sessions.

With the August '17 Release, a new child sessions security object is also added, which controls the permission for creating child sessions. If the portal has the backend setting for allowing multiple providers enabled, the new security object will be enabled and the permission is assigned to the system administrator security role.

Considerations

When the backend setting to allow multiple providers for a session is enabled, administrators need the Sessions - Create Child Sessions permission to create child sessions even if they have the Sessions - Create permission.

During user acceptance testing (UAT), the Sessions - Create Child Sessions permission is visible in Stage portals even if the backend setting to allow multiple providers for a session is disabled. However, the functionality to create child sessions is only granted when the backend setting is enabled.

Upon release, the Sessions - Create Child Sessions permission is only visible if the backend setting to allow multiple providers for a session is enabled. This applies to all portals.

Implementation

This functionality is automatically enabled for all portals using the Learning module. The permission to create child sessions is automatically distributed to system administrators. To grant permission access to other security roles, the permission to create child sessions must be manually added to a security role by the administrator.

Permissions

The following new permission is available:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Sessions - Create Child Sessions	Grants ability to create new instructor led training child sessions available when the backend setting to allow multiple providers for a session is enabled. When the multiple providers backend setting is enabled,	Learning - Administration

administrators need this permission to create child sessions even if they have the Sessions - Create permission. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission.

Note: *This permission is visible in the system even if the backend setting to allow multiple providers for a session is disabled. However, the functionality to create child sessions is only granted when the backend setting is enabled.*

Custom Reporting - Learning Fields

Custom Reporting - Learning Fields - Overview

Prior to this enhancement, several certification fields, Instructor-Led Training (ILT) fields, and material fields could not be reported on via custom reporting functionality. For example, it was not possible to report on the details of ILT Instructors at the event level, and it was not possible to report on different languages used in the Material URL field. The purpose of some certification-related fields was also not intuitive.

With this enhancement, custom reporting has been enhanced to include the addition and improvement of several fields related to the Learning module.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Certification Report - Create	Grants ability to create and edit Custom Certification reports. This permission can be constrained by OU, User's OU, 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 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	Reports - Analytics

	Subordinates.	
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

Learning Fields

With this enhancement, fields have been added to the following custom report sections:

- Certification
- Training
- Transcript

Select fields in the following sections have been modified from their original versions:

- Certification
- Training

Note: *The Certifications report section has been renamed to "Certification."*

The added learning fields allow administrators to report on data such as certification contact and modified date, training roster comments, and transcript modification.

Certification Fields

The following fields have been added to the Certification report section:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Certification Active	Certification	This field indicates whether or not the certification is active.	Yes/No	Certification Report
Certification Contact (Email)	Certification	This field is the email address of the contact of the certification.	Email	Certification Report
Certification Language	Certification	This field is the language of the certification.	Text	Certification Report
Certification Modified Date	Certification	This field displays the date the certification was last modified.	Date	Certification Report
Certification Owner (User ID)	Certification	This field is the user ID of the owner of the certification.	Text	Certification Report
Certification Prerequisite - Certification Title	Certification	This field displays the title of the certification that has been set as the prerequisite for the certification being reported on.	Text	Certification Report
Certification Prerequisite - Training Object ID	Certification	This field is the ID of the training that has been set as the prerequisite for the certification being reported on.	Text	Certification Report

The following existing Certification fields have been modified:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Certification Family	Certification	This field was previously called, "Family." This field displays the certification family to which the certification belongs.	Text	Certification Report
Certification Category	Certification	This field was previously called, "Category." This field displays the certification category to which the certification belongs.	Text	Certification Report
Certification Description	Certification	This field was previously called, "Description." This field displays the description of the certification.	Text	Certification Report
Certification Version	Certification	This field was previously called, "Version." This field displays the version number of the certification.	Numeric	Certification Report
Certification Owner (Name)	Certification	This field was previously called, "Certification owner." This field displays the name of the user specified as the certification owner.	Text	Certification Report
Certification Owner Approval Warning	Certification	This field was previously called, "Owner Approval Warning."	Text	Certification Report
Certification Owner Denial Warning	Certification	This field was previously called, "Owner Denial Warning."	Text	Certification Report
Certification Contact (Name)	Certification	This field was previously called, "Contact (Name)." This field displays the name of the user specified as the certification contact.	Text	Certification Report
Certification Contact (User ID)	Certification	This field was previously called, "Contact (ID)." This field displays the User ID of the user specified as the certification contact.	Text	Certification Report
Certification Approval Comments	Certification	This field was previously called, "Approval Comments." This field displays any comments that were left when the certification was	Text	Certification Report

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
		approved.		
Certification Carryover Credits	Certification	This field was previously called, "Carryover Credits." This field displays the number of carryover credits.	Text	Certification Report
Certification Denial Comments	Certification	This field was previously called, "Denial Comments." This field displays any comments that were left when the certification was denied.	Text	Certification Report
Certification Revoke Comments	Certification	This field was previously called, "Revoke Comments." This field displays any comments that were left when the certification was revoked.	Text	Certification Report
Certification Minimum Credit Completion Required	Certification	This field was previously called, "Minimum credit completion required." This field displays the minimum number of credits that are required to complete the certification.	Text	Certification Report
Certification Prerequisite - Training Title	Certification	This field was previously called, "Pre-requisites." This field displays the title of any prerequisites for the certification.	Text	Certification Report
Certification Period Title	Certification	This field was previously called, "Period Title." This field displays the title of the certification period.	Text	Certification Report
Certification Period Type	Certification	This field was previously called, "Certification Period Type." This field displays the type of the certification period.	Text	Certification Report
Certification Period First Completion Date	Certification	This field was previously called, "First Period Completion Date." This field displays the completion date of the first certification period.	Date	Certification Report
Certification Period Is	Certification	This field was previously called, "Is Current Period." This field	Yes/No	Certification Report

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Current		displays whether or not the certification period is current.		
Certification Period Acquired Credit	Certification	This field was previously called, "Period Acquired Credit." This field displays the credit acquired during the certification period.	Numeric	Certification Report
Certification Period Due Date	Certification	This field was previously called, "Period Due Date." This field displays the due date of the certification period.	Date	Certification Report
Certification Period Expiration Date	Certification	This field was previously called, "Period Expiration Date." This field displays the expiration date of the certification period.	Date	Certification Report
Certification Period Required Credits	Certification	This field was previously called, "Required Period Credit." This field displays the number of credits required to complete the certification period.	Numeric	Certification Report
Certification Period User Completion Date	Certification	This field was previously called, "User Period Completion date." This field displays the date the user completed the certification period.	Date	Certification Report
Certification Section Title	Certification	This field was previously called, "Section Title." This field displays the title of the certification section.	Text	Certification Report
Certification Parent Section Title	Certification	This field was previously called, "Associated Parent Section Title." This field displays the title of the parent certification section (if applicable).	Text	Certification Report
Certification Section Maximum Credit	Certification	This field was previously called, "Section Max Credit." This field displays the maximum number of credits that can be earned completing the section.	Numeric	Certification Report
Certification Section	Certification	This field was previously called, "Section Min Credit." This field	Numeric	Certification Report

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Minimum Credit		displays the minimum number of credits that must be earned to complete the section.		
Certification Section Acquired Credit	Certification	This field was previously called, "Section Acquired Credit." This field displays the number of credits acquired for the section.	Numeric	Certification Report
Certification Training Acquired Credit	Certification	This field was previously called, "LO Acquired Credit." This field displays the number of credits acquired for the certification.	Numeric	Certification Report
Certification Training Possible Credit	Certification	This field was previously called, "LO Possible Credit." This field the number of credits that can possibly be earned by completing the certification.	Numeric	Certification Report
Certification Training Not Activated	Certification	This field was previously called, "Training Not Activated." This field displays whether or not the certification has been activated on the user's transcript.	Yes/No	Certification Report
Certification User Archived	Certification	This field was previously called, "User Certification Archived." This field displays whether or not the certification has been moved to the user's Archived transcript.	Yes/No	Certification Report
Certification User Status	Certification	This field was previously called, "User Certification Status." This field displays the user's current status for the certification.	Text	Certification Report

Note: Data output for Certification fields will be flattened. Each item appears in a separate row. This may cause existing reports to increase in size.

Training Fields

The following fields have been added to the Training report section:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
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FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Training Roster Commented By (Name)	Training	This field is the full name of the user that added the comments to the roster.	Text	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Training Roster Commented By (User ID)	Training	This field is the User ID of the user that added the comments to the roster.	Text	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Training Roster Commented Date	Training	This field is the date that the user added the comments to the roster.	Date	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Training Roster Comments	Training	This field displays the comments that were added to the roster.	Text	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Equivalent Training Object ID	Training	This field is the ID of the equivalent training (associated with the Training Title field).	Text	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Equivalent Training Version	Training	This field is the version number of the equivalent training (associated with the Training Title field).	Numeric	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report,

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
				Transaction Report, Transcript Report
Language Equivalent Training Object ID	Training	This field is the ID of the language equivalent training (associated with the Training Title field).	Text	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Language Equivalent Training Version	Training	This field is the version number of the language equivalent training (associated with the Training Title field).	Numeric	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report

The following existing Training section fields have been modified:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Equivalent Training Title	Training	This field is the title of the equivalent training (associated with the Training Title field). This field was previously called "Equivalencies."	Text	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report
Language Equivalent Training Title	Training	This field is the title of the language equivalent training (associated with the Training Title field). This field was previously called "Language Equivalencies."	Text	Assignment Report, Certification Report, Multi-Module Report, Training Report, Training Plan Report, Transaction Report, Transcript Report

Note: Data output for Equivalent Training and Language Equivalent Training fields will be flattened. Each Equivalent Training result appears in a separate row. This may cause existing reports to increase in size.

Transcript Fields

The following fields have been added to the Transcript report section:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Transcript Edited By (Name)	Transcript	This field is the full name of the user that modified the user's transcript.	Text	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Transcript Edited By (User ID)	Transcript	This field is the User ID of the user that modified the user's transcript.	Text	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Transcript Edited Date	Transcript	This field is the date that the user modified the transcript.	Date	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
Transcript Edited Comments	Transcript	This field displays the comments that were entered when the transcript was modified.	Text	Assignment Report, Certification Report, Multi-Module Report, Test Report, Transaction Report, Transcript Report
User Attended Part?	Transcript	This field indicates whether or not the user attended the individual Part.	Yes/No	Certification Report, Multi-Module Report, Test Report, Transcript Report

Learning Assignment Tool - Ability to Copy Emails

Prior to this enhancement, the ability to copy custom emails or ad hoc emails when copying a learning assignment was not available. When copying an assignment, it was necessary to reconfigure any custom email or ad hoc email settings.

With this enhancement, all email settings, including custom emails and ad hoc emails, are copied when a learning assignment is copied.

User Story

Lindsay is a learning administrator at Acme Corp. One of Lindsay's major responsibilities is to assign one or more training items to several users at a time, so she frequently uses the Learning Assignment Tool to do so.

Upon opening the Learning Assignment Tool, Lindsay can quickly create a new assignment or resume a draft she started creating earlier. When Lindsay is creating new assignments, user-friendly wording, enhanced visuals, clear error notifications and a logical workflow help her clearly understand the outcome of her selections so that she never has a doubt when submitting the assignment.

When Lindsay is ready to follow-up on assignments she has submitted, it's easier than ever to find the one she wants to review, because she can narrow her search by the custom Assignment Title she provided, as well as the Assignment ID. Once found, it only takes her one click to navigate to a comprehensive page that displays the assignment settings, transcript history details for each user, and training progress summary for each training item within the assignment. To save time, she can copy assignments, which allows her to quickly create new assignments that are similar to the original. When she makes a copy, the assignment type, scheduling settings, email settings, and more will be pre-populated for the new assignment, based on the settings of the original.

Ultimately, Lindsay can create assignments confidently, track them intelligently, and manage them easily with the Learning Assignment Tool, ensuring that the right users get the right training at the right times.

Considerations

- Cohorts - If a cohort learning object (LO) is selected for the learning assignment, the Custom Emails option will be hidden in the Email Settings section of the assignment creation process.
- Sessions - If a session LO AND an LO of any other type are selected for the learning assignment, the Custom Emails option will be hidden in the Email Settings section of the assignment creation process.
- Permissions - Depending on what Learning Assignment Tool permissions the administrator possesses, the email settings in the assignment creation process may not be visible to the administrator, or they may be read-only. See the Permissions section below for details about the abilities granted with associated permissions.

Implementation

The ability to copy learning assignment email settings is automatically enabled in all portals using the Learning module.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Email Settings - Manage	Grants ability to manage email settings when creating a Learning Assignment. This includes the ability to select all four email settings, set up Custom Emails (create new emails and set existing emails as active/inactive), set up Ad-Hoc Emails, and enable/disable Assign Training and Register Training email triggers when Training Specific Emails is selected. This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. If this permission is constrained, then only users within the constraints will receive the emails. This is an administrator permission.	Learning - Administration
Assignment Tool - Email Settings - View	Grants ability to view and select email settings when creating a Learning Assignment. This includes the ability to select Training Specific Emails, Custom Emails, or No Emails but does not grant ability to manage the actual Email Settings (cannot configure Custom Emails or Ad-Hoc Email and cannot enable/disable Assign Training and Register Training email triggers when Training Specific Emails is selected). This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. If this permission is constrained, then only users within the constraints will receive the emails. This is an administrator permission.	Learning - Administration

Learning Experience Platform (LEP) - Learner Home

Learning Experience Platform (LEP) - Learner Home

Prior to this enhancement, users were able to discover relevant training through a combination of the Welcome Page, Browse for Training, and Global Search. Users were able to view their assigned compliance training on their transcript or via widgets on the Welcome Page. There was no single location with which users could discover, request, and manage assigned training all at once.

With this enhancement, users have access to a single learning hub called the Learner Home. This page facilitates a seamless learning experience for users, allowing them to browse for and request relevant training, search and filter for specific training, and helps ensure compliance by helping users prioritize and take action on training they must complete. The Learner Home includes several features which enable learners to easily select subjects of interest, discover training based on machine learning, and quickly access and request new training.

See [Learner Home Preparations for information about preparing your portal for Learner Home and Learning Search](#).

[Click here to access the Starter Guide for Learner Home and Learning Search.](#)

Use Case

Steve works at Acme Corporation and is considered a learner. He logs into his personalized Learner Home page. On this page, Steve notices the total number of training completions and hours as well as all of his accumulated badges, which constantly encourages him to earn more.

On this page, Steve sees a list of training on his transcript with a due date, prioritized by what he needs to complete first. Similar to his Netflix account, Steve sees carousels of training which include training he recently took action on, training he has saved for later, or training that is recommended to him based on his interests, position, and training he has completed. From here, Steve can easily resume or take action on training that he is currently taking or must complete, without navigating to his transcript. He can also quickly launch or request new training.

Machine Learning

In some areas, recommendations are displayed to users based on relevance, which is determined by machine learning. This information is updated in the following manner:

- Machine Learning is updated weekly in Production portals.
- Machine Learning will not run in Pilot portals.
- Machine Learning is run twice in Stage during user acceptance testing (UAT) and will not run again until the next release UAT.
- For the August 2017 Release:
 - During UAT for the August 2017 Release, Machine Learning will be updated twice in Stage on July 19 and July 26. This will reflect any updates to recommendations appearing in Learner Home.

- Machine Learning will be available in Production for the August 2017 Release.
- As Z-Score runs on the Machine Learning Platform, it will only be available to run in Production and during Stage updates taking place in UAT. It will not be available in Pilot.

Implementation

This functionality is automatically enabled for all portals using the Learning module. Administrators automatically receive the permission for accessing Learner Home, but administrators must distribute this permission to other users who should be able to access Learner Home. A Learner Home link is automatically added under the Learning tab, but it is only visible to users with the permission to access Learner Home.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Default Training Image Preferences	Grants access to Default Training Image Preferences page where an administrator can configure custom default images for training by type. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning
Learner Home Preferences	Grants access to the Learner Home Preferences page, where the administrator can configure the arrangement of content on Learner Home, as well as other settings. This permission can be constrained by organizational unit (OU) and User's OU. This is an administrator permission.	Learning - Administration

The following updated permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. Note: <i>For security purposes, this permission is constrained to User Self and</i>	Universal Profile

	<p><i>Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.</i></p> <p>With the Aug '17 release, this permission also allows end users to view the Completions & Hours field, the training sidebar, and the Continue Learning carousel on the Learner Home page.</p>	
<p>Snapshot - Badges</p>	<p>Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i></p> <p>With the Aug '17 release, this permission also allows end users to view the Badges field on the Learner Home page.</p>	<p>Universal Profile</p>

Learner Home Welcome Message and Search Box

At the top of the Learner Home, a welcome message displays with the name of the user in the format of “Welcome <User First Name>! What would you like to learn today?” **Note:** *This message is not configurable, but the message text is localized.*

Directly below the welcome message, a search box displays and allows users to search for specific learning using powerful search technology that is fully optimized for both desktop and mobile browsers. Users can enter words relating to the following training attributes into the search box to receive relevant training results that are sorted by relevance:

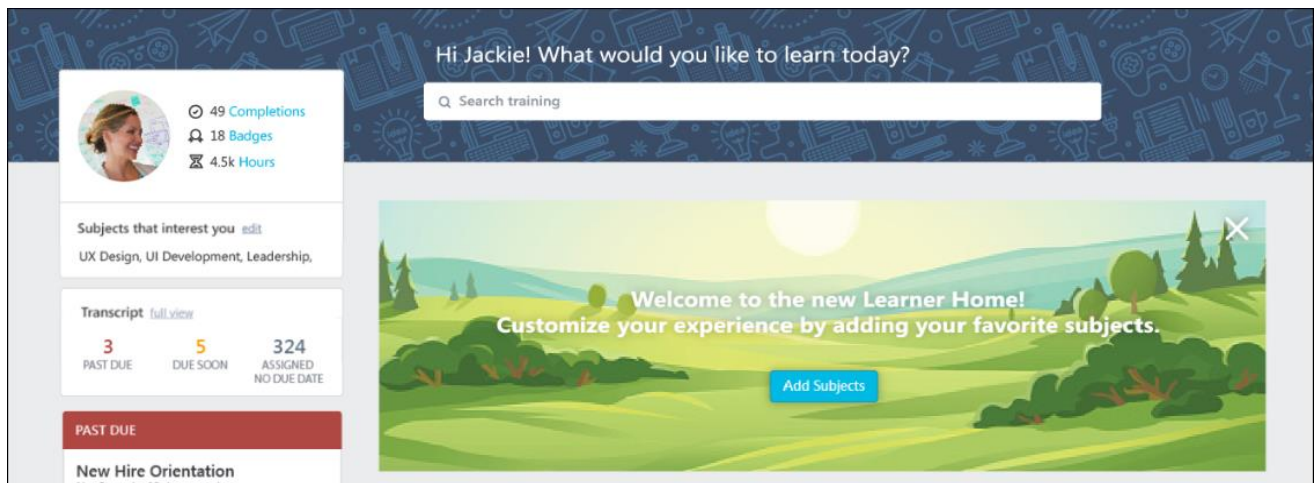
- Title
- Keywords
- Description

The welcome message and search box display on top of a blue banner image that spans across the width of the page. **Note:** *This image is not configurable.*

To access Learner Home, go to **LEARNING > LEARNER HOME.**

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning



Search Training

To search for training on the Learner Home page:

1. Enter a search term or phrase into the search box and press the Enter key on your keyboard. You will be redirected to the Learning Search page. You can also press the

Enter key without entering search terms, which navigates you to the Learning Search page with all available results displayed.

2. Peruse the results which display on the Learning Search page and use the available filters to receive more specific training results, if necessary. Search results are sorted by relevance, and text queries are matched with content title, descriptions, and keywords. For more information about using the Learning Search page, [See **Learning Experience Platform \(LEP\) - Learning Search - Overview**](#) on page 361 *for additional information.*

Learner Home - User Profile

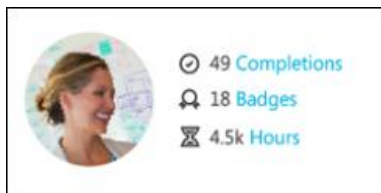
The User Profile section of the Learner Home page displays information about the user, including their profile photo, badges, number of completions and hours, subjects they are interested in, and training on their transcript. Using the User Profile panel, users can get an overview of their transcript stats and quickly access more specific information about the data displayed in the panel.

To access the Learner Home page, go to **LEARNING > LEARNER HOME**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	<p>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. Note: <i>For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.</i></p> <p>With the Aug '17 release, this permission also allows end users to view the Completions & Hours field, the training sidebar, and the Continue Learning carousel on the Learner Home page.</p>	Universal Profile
Learner Home	<p>Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.</p>	Learning
Snapshot - Badges	<p>Enables user to view the Badges widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission works in conjunction with the Snapshot Main - View permission. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Any user with this permission will always be able to view their own Badges widget when the widget is enabled. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i></p>	Universal Profile

With the Aug '17 release, this permission also allows end users to view the **Badges** field on the Learner Home page.



User Profile

The User Profile panel displays on the upper-left side of the Learner Home page and allows users to quickly view personal learning stats. From the User Profile panel, users can also open a flyout which allows them to indicate interest in specific training subjects, which the Learner Home uses to provide more tailored training suggestions.

The User Profile panel displays the following information to the user:

- **Profile Photo** - This field displays the user photo uploaded to the user record. Clicking the profile photo redirects the user to the Bio tab of their Universal Profile. **Note:** *This picture is only clickable if the user has permission to view the Bio page.*
- **Completions** - This field displays the number of all-time, standalone training items on the user's Completed transcript. This number matches the number of training returned on the Completed page of the transcript. This number does not include archived training, removed training, or any child training items (such as training items within a curriculum). Click the **Completions** link to be redirected to the Completed transcript. **Note:** *This field only displays if the user has permission to view the Bio page.*
- **Badges** - This field displays the number of all-time badges the user has earned. This number includes both Learning badges and Feedback badges, if Performance is also enabled in the portal. Click the **Badges** link to be redirected to the Badges Snapshot page. **Note:** *This field only displays if the user has the permission to view badges on the Snapshot page.*
- **Hours** - This field displays the sum of the training hours a user has completed. This number is calculated from the training hours that are currently associated to the training on the user's transcript in a Completed status. Archived training and any child training items (such as training items within a curriculum) are included in this calculation. Click the **Hours** link to be redirected to the Completed transcript. **Note:** *Training hours are not currently snapshotted on the Transcript. This means that the number is based off the training hours that are stored at the training level.*
- The following is INCLUDED in the Hours calculation:
 - Archived training
 - Child training (e.g. training with a Curriculum)
 - Prerequisite, Pre-work, and Post-work training
 - Certification training types (Note: these are calculated using the sum of all the training hours for the child training within the Certification)

- Cohort training types (Note: these are calculated using the training hours set for the Cohort, if any, and the sum of all the training hours for the child training)
- Curriculum training types (Note: these are calculated using the training hours set for the Curriculum, if any, and the sum of all the training hours for the child training)
- Material training types (Note: these are calculated using the training hours set for the Material and does NOT take the observation duration for an OJT Material into account)
- Online Class training types
- Posting training types
- Quick Course training types
- Session training types (Note: these are calculated using the sum of all the parts minus any breaks)
- Test training types
- Video training types
- The following is EXCLUDED from the Hours calculation:
 - Removed training
 - Event training types (since Sessions are accounted for)
 - Library training types (since Online Classes are accounted for)
 - Program training types (since these do not live on the Transcript)
- **Your Subjects** - This section displays the training subjects in which the user has indicated interest. Selected subjects display alphabetically, and up to two lines of subjects can display in the Your Subjects section. If no subjects have been added to your profile, click the **Add** link to begin adding subjects. If at least one subject has already been selected, to modify the subjects contained in this section, click the **Edit** link. This opens the Your Subjects flyout. For information about selecting training subjects, **See Learner Home - Your Subjects** on page 330 *for additional information*.

Learner Home - Your Subjects

The Your Subjects flyout allows users to add and remove training subjects from the list of subjects they are interested in, which impact the training suggestions offered in the *Inspired by Your Subjects* carousel on the Learner Home page. For more information about the Learner Home content sections, [See Learner Home Carousels on page 339 for additional information.](#)

Note: *In order to ensure subject selection is consistent across the learner experience, subject selections made from Learner Home are synced with the subject selections on the user's Universal Profile page.*

To access the Your Subjects flyout, go to **LEARNING > LEARNER HOME** and click either the **Add** link or the **Edit** link in the Your Subjects section of the User Profile panel.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning

Your Subjects

Select subjects and we will show you training based on what you pick.

Suggestions

UX Design

Hardware Construction

UI Development

Marketing

Comparative Business Practices

Typography

Analytics

Copyrights

Finance

Business Ethics

Business Management

Visual Arts

Digital Marketing

Product Design

Mobile Design

Marketing Trends

Corporate Markets

Fine Arts

Work Innovation

Cancel

Save

Your Subjects

After the user clicks the **Add** link or the **Edit** link in the User Profile section of the Learner Home page, the Your Subjects flyout opens on the left side of the page. Users can find subjects either using the search bar with predictive search or by viewing the Suggestions section of the Your Subjects flyout.

Search Subjects

To search for specific subjects, begin typing the subject name into the search bar, and predictive search results appear below the text that is entered. The Your Subjects flyout returns subjects related to the entered term, and the you can press the Enter key on your keyboard while the desired subject is selected, which adds it to the your subjects. You can also click the subject to select it. Subjects in the predictive search results are sorted by relevancy to the search term, and a maximum of eight subjects can display in the drop-down search results. **Note:** *The subjects returned in the predictive search results include both parent and child subjects. Subjects in a hierarchy are 'flattened' out allowing the user to search across the entire subject hierarchy.*

View Selected Subjects

This section displays the training subjects in which the user has indicated interest. Selected subjects can be deselected by unchecking the box. There is no maximum to the number of subjects that a user can select. Selected subjects display alphabetically, and there is no maximum to the number of subjects that can display in this section. The section becomes scrollable if many subjects are selected. If no subjects have been selected by the user, this section does not display.

Suggested Subjects

The Suggestions section of the flyout displays subjects that are recommended to the user based on their position, division, and location, and then neighboring positions, divisions, and locations in the hierarchy to find recommendations. Subjects in this section are sorted by relevancy to the user (determined by machine learning), and a maximum of 20 recommended subjects can display in this section.

The user can peruse the suggested subjects that display in the Suggestions section of the flyout and check the box next to any desired suggested subject to select. Multiple subjects can be selected. Selected subjects can be deselected by unchecking the box.

Save Subjects

After selecting all desired subjects, click the **SAVE** button in the bottom right corner of the flyout. To exit the flyout without saving your selections, click the **CANCEL** button instead.

Note: *When users first navigate to the Learner Home page, they will see an Add Subjects introductory banner, which displays text that says, "Welcome to the new Learner Home! Customize your experience by adding your favorite subjects." The banner provides access to an Add Subjects button which causes the Your Subjects flyout to open, allowing the user to add to or modify their subjects. Once the user has selected subjects for their Learner Home experience, or if they dismiss the banner, the introductory banner will disappear and*

a custom banner carousel may display on the Learner Home page, depending on the administrator's preference configurations. For information about banner configuration, [See Learner Home Preferences](#) on page 349 for additional information. . For information about Learner Home banners, [See Learner Home Carousels](#) on page 339 for additional information.

Learner Home - Training Sidebar

The Training Side bar displays below the User Profile panel on the left side of the Learner Home page. This section ensures the user is up to date on their training. This may include any training that is on their transcript with a due date and any assigned training. This section allows users to quickly assess their transcript health and ensure they never miss a deadline.

To access the Learner Home page, go to LEARNING > LEARNER HOME. The training sidebar is only visible to users who have the permission to view the transcript. The backend setting for the Universal Profile transcript section must also be enabled.

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. Users must also have the Bio About - View permission in order to access the transcript within Universal Profile. 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
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning

Training Sidebar Considerations

The training sidebar includes the following sections:

- Transcript Counts
- Past Due
- Due Soon
- Assigned/No Due Date

The following training types can display in these sections:

- Certification
- Curriculum
- Cohort
- Event
- Library
- Material
- Online Class
- Posting
- Quick Course

- Session
- Test
- Video

The following types of training items do NOT display in the training sidebar sections:

- Archived training
- Removed training
- Completed training
- Certified certifications
- Child training (i.e. training inside a curriculum)
- Program training items

Transcript Counts

The Transcript Counts section of the training sidebar displays a high-level overview of training the user may need to complete. This includes any training that is on their transcript with a due date and any assigned training. The following information displays in the section:

- **Past Due** - This field displays the total number of uncompleted past due training items on the user's transcript. If no training items meet the criteria, this number does NOT display.
- **Due Soon** - This field displays the total number of uncompleted training items on the user's transcript that have an approaching due date. If no training items meet the criteria, this number does NOT display.
- **Assigned No Due Date** - This field displays the total number of uncompleted training items that have been assigned to the user without a due date. If no training items meet the criteria, this number does NOT display.

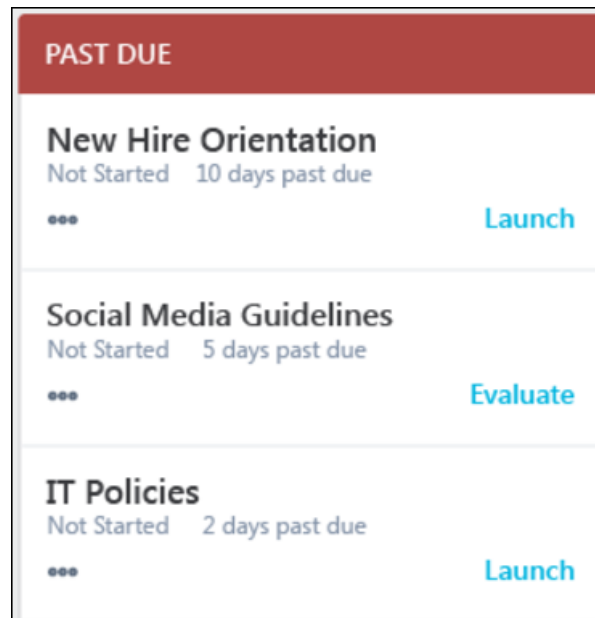
Click the **View** link to be redirected to your active transcript.

Past Due

The Past Due section of the training sidebar displays training on the user's transcript that has a due date that is greater than the current date. Up to ten training items can display in this section, but only ten total items can display in the entire training sidebar. Priority is given to the ten training items with the most urgent due dates on the user's transcript. If no training items meet the criteria, this section does NOT display. Each training item displays with the following information:

- **Title** - This field displays the title of the training item. Clicking the title redirects the user to the Training Details page for the training item.
- **Status** - This field displays the training item's current status on the user's transcript.
- **Days Past Due** - This field displays the number of days which has passed since the training item was due. **Note:** *Items in this section are sorted by due date. Training due the greatest number of days ago displays at the top.*

- **Primary Action & Options** - Transcript tiles display a primary action and secondary actions for each individual training item. See [Transcript and Training Tiles](#) on page 345 for additional information.



Due Soon

The Due Soon section of the training sidebar displays training items on the user's transcript with an approaching due date. Up to ten training items can display in this section, but only ten total items can display in the entire training sidebar. Priority is given to the ten training items with the most urgent due dates on the user's transcript. If no training items meet the criteria, this section does NOT display. Each training item displays with the following information:

- **Title** - This field displays the title of the training item. Clicking the title redirects the user to the Training Details page for the training item.
- **Status** - This field displays the training item's current status on the user's transcript.
- **Due Date** - This field displays when the training item is due. If the training is due within the next 30 days, the number of days left until the due date displays. If the training is due in more than 30 days, the training due date displays. **Note:** *Items in this section are sorted by due date. Training with the soonest due date displays at the top of the section.*
- **Primary Action & Options** - Transcript tiles display a primary action and secondary actions for each individual training item. See [Transcript and Training Tiles](#) on page 345 for additional information.

DUE SOON

Security Awareness Essentials & Life Saving
Not Started Due today
... [Launch](#)

Special Procedures for Disclosure of Data
Not Started Due in 3 days
... [Acknowledge](#)

Wireless Networking Policy
In Progress Due in 10 days
... [Mark Complete](#)

Assigned/No Due Date

The Assigned/No Due Date section of the training sidebar displays training that has been assigned to the user without a due date. Up to ten training items can display in this section, but only ten total items can display in the entire training sidebar. If no training items meet the criteria, this section does NOT display. Each training item displays with the following information:

- **Title** - This field displays the title of the training item.
- **Status** - This field displays the training item's current status on the user's transcript.
- **Primary Action & Options** - Transcript tiles display a primary action and secondary actions for each individual training item. [See Transcript and Training Tiles on page 345 for additional information.](#)

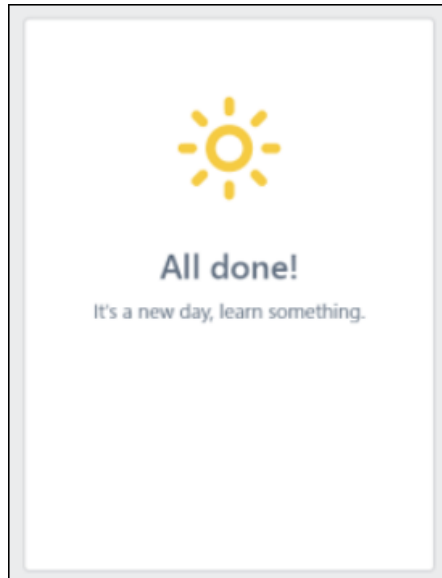
ASSIGNED / NO DUE DATE

Travel Curriculum
Not Started
... [Launch](#)

Data Retention Policy
Not Started
... [Launch](#)

No Training on Transcript

If the user does not have any training on their transcript that is either assigned or has a due date, the entire training side bar is hidden. In this case, a sun icon and text that reads, “All done! It’s a new day, learn something.” displays. The total counts section still displays with a link to the full transcript.

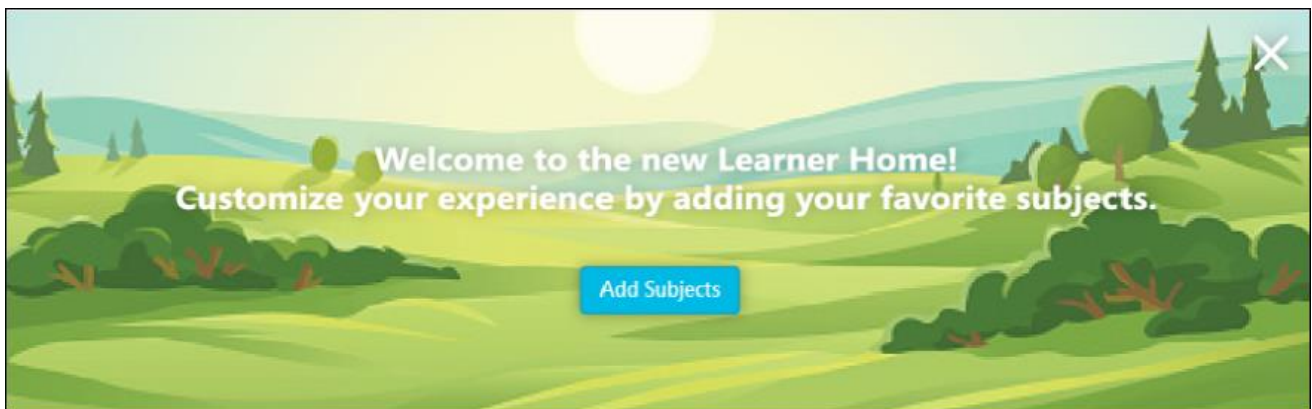


Learner Home - Introduction Banner

When a user navigates to the Learner Home page for the first time, the Learner Home displays an introduction banner above the various carousels. This banner includes a welcome message and a prompt to add subjects to their profile.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning



Introduction Banner

The introduction banner includes the following:

- Text - The introduction banner reads, "Welcome to the new Learner Home! Customize your experience by adding your favorite subjects."
- Add Subjects button - Clicking this button causes the Your Subjects flyout to open, allowing the user to add subjects to their profile. See [Learner Home - Your Subjects](#) on page 330 *for additional information*.

The Introduction Banner displays either until a user selects a subject or until they dismiss the banner by clicking on the 'X' in the upper right corner of the banner.

Note: *The introduction banner is not configurable.*

Note: *Any custom banner configured by the administrator only appears on the Learner Home page after the user either adds subjects or dismisses the introduction banner. The introduction banner and the custom banners configured by the administrator via Learner Home Preferences never display on the Learner Home at the same time.*

Learner Home Carousels

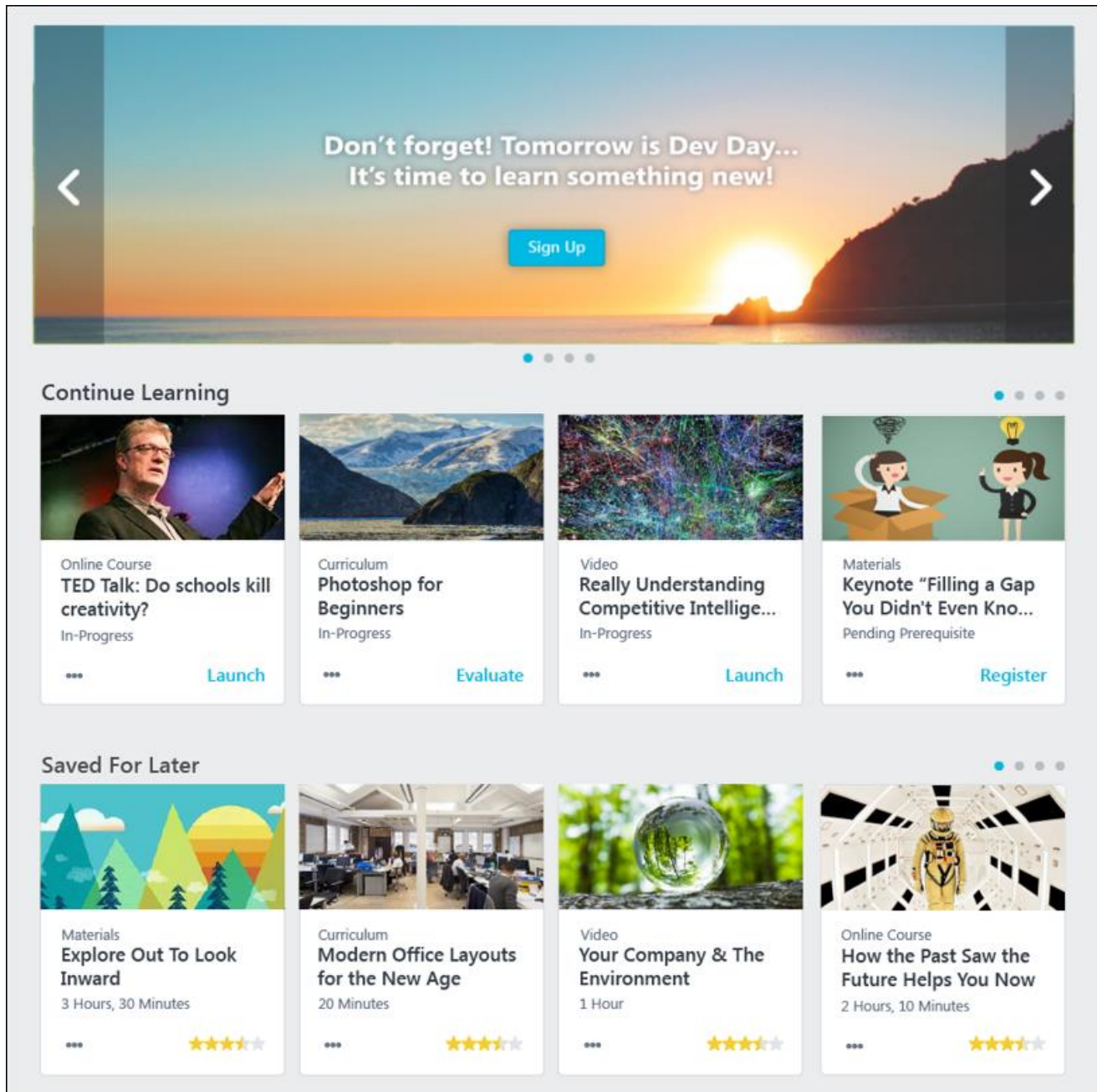
Below the search bar on the Learner Home page, several different carousels may display to the user if applicable training is available. These carousels include a custom banner carousel (if configured by an administrator) and various training recommendation carousels.

- The custom banner carousel cycles through various banner images which can include text and a clickable button which navigates the user to another system page.
- The training carousels allow users to page through categorized training items that are relevant to them.

To access the Learner Home page, go to **LEARNING > LEARNER HOME**.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning



Learner Home Carousels

The carousels on the Learner Home page display in the following order, unless otherwise configured via Learner Home Preferences:

- Custom Banner (if configured)
- Continue Learning
- Saved for Later
- Top Picks for User
- Trending for Your Position

- Inspired by Your Subjects
- Most Popular

The order of the carousels can be configured by the administrator via Learner Home Preferences. [See Learner Home Preferences](#) on page 349 *for additional information*.

Custom Banner Carousel

The custom banner carousel on the Learner Home page cycles through different banners configured by the administrator. Depending on the preferences configured for the Learner Home page, the banner carousel may display before, amongst, or below the training category sections. Different banners may also be configured to display with text over the image, or with a button built into the banner which navigates the user to a different system page or external site when clicked.

Up to four banners can be included in the custom carousel. The banner will automatically shuffle through available custom banner images. Users can interact with the banner in the following ways:

- Page through the available banners by clicking the pagination dots below the banner
- Page through the available banners by clicking the left and right navigation arrows which appear when the user hovers over the banner
- Stop and resume auto-play by clicking the Play and Pause buttons that appear on the lower right of the banner

Note: *The custom banner only appears on the page after the user adds subjects to their profile or dismisses the introduction banner. The introduction banner and the custom banner never display on the Learner Home at the same time. [See Learner Home - Introduction Banner](#) on page 338 *for additional information*.*

For information about how to configure Learner Home banners, [See Learner Home Preferences](#) on page 349 *for additional information*.

Training Carousels

CAROUSEL	DETAILS
Continue Learning	This section displays training that is on the user's active transcript. Training in this section is sorted by the last transcript status change date, and a maximum of 20 training items can display in the section. If no training is on the user's active transcript, this section is hidden. Note: <i>The last transcript status change date is a date field that tracks when a training moves from one transcript status to another transcript status.</i>
Saved for Later	This section displays training that has been saved by the user. Training in this section is sorted by most recently saved first, and there is no limit on the number of training items that can display in this section. If the user has not saved any training, this section is hidden. If any of the user's saved

CAROUSEL	DETAILS
	<p>training has been made inactive or unavailable, that training is removed from the section automatically. Note: <i>This section displays the most recent version of the saved training. For example, if the user saved Leadership Skills (Version 1), and Leadership Skills (Version 2) has since been published, Version 2 of the training displays for the user in this section.</i></p>
Top Picks for User	<p>This section displays training that is recommended to the user based on their training history. Training in this section is sorted by relevancy to the user (determined by machine learning), and a maximum of 20 training items can display in this section. If no recommendation results are found for the user, the system considers the training history of users in the user's position, division, and location, and then neighboring positions, divisions, and locations in the hierarchy to find recommendations. This section is hidden if any of the following are true:</p> <ul style="list-style-type: none"> ○ The backend setting for machine learning course recommendations is not enabled. ○ No recommendation results are found for the user. ○ An error occurs.
Trending for Your Position	<p>This section displays training that is recommended to the user based on their position. Training in this section is sorted by relevancy to the user (determined by machine learning), and a maximum of 20 items can display in this section. If no recommendations are found for the user's position, then the system considers the user's division and location, then neighboring positions, divisions, and locations in the hierarchy to find recommendations. This section is hidden if any of the following are true:</p> <ul style="list-style-type: none"> ○ The backend setting for machine learning course recommendations is not enabled. ○ No recommendation results are found for the user. ○ An error occurs.
Inspired by Your Subjects	<p>This section displays training that is recommended to the user based on subjects in which the user has indicated interest. See Learner Home - Your Subjects on page 330 for additional information. Training in this section is sorted by relevancy to the user (determined by machine learning), and a maximum of 20 items can display in the section. If the user has not selected any subjects, then the section displays a prompt for the user to add subjects. If no recommendations are found for the user's selected subjects, the system considers the user's division and location, then neighboring positions, divisions, and locations in the hierarchy to find recommendations. This section is hidden if any of the following are true:</p>

CAROUSEL	DETAILS
	<ul style="list-style-type: none"> ○ The backend setting for machine learning course recommendations is not enabled. ○ No recommendation results are found for the user. ○ An error occurs.
Most Popular	This section displays training that was requested the most number of times in the last 60 days. Training in this section is sorted by the highest number of requests, and a maximum of 20 items can display in the section. If no training has been requested in the last 60 days, this section is hidden.

On a desktop browser, up to four tiles can display at a time for each training carousel. When sized down to a mobile device, one and a half tiles display at a time for each training carousel. Users can interact with the carousel in the following ways:

- Page through the tiles by clicking the pagination dots on the top right of the carousel
- Page through the tiles by clicking the left and right navigation arrows which appear when the user hovers over the carousel. **Note:** *Clicking the right navigation arrow on the last page of tiles will returns the user to the beginning of the carousel.*

Recommendation Carousels – Filtering Logic

Four of the Learner Home carousels are recommendation carousels. The purpose of these carousels is to recommend relevant training to the user. To ensure that the system only recommends appropriate training to the user, the system automatically applies filtering logic to the results. This ensures that the user is not recommended any incorrect training (e.g. not in their availability, inactive, etc.). The exclusions documented in this section **ONLY** apply to the following Learner Home training carousels:

- Top Picks for User
- Trending for Your Position
- Inspired by Your Subjects
- Most Popular

The following training will **NOT** be recommended to users in the above training carousels:

- Session or cohort training items (because there is a date component to these types)
- Training flagged as "Exclude from Recommendations" via the Course Catalog
- Training not available to the user (i.e. not in their availability)
- Inactive training
- Training that was requested or assigned (i.e. is already on the user's transcript)
- Training that is NOT in a Published training status
- Training that is NOT the latest version
- Training that has recurrence enabled and is already on the user's transcript

- Child training that is not standalone
- Child training that is on a user's transcript as Active (and is also a standalone training item)
- Child training that is on a user's transcript as Not Yet Activated (and is also a standalone training item)

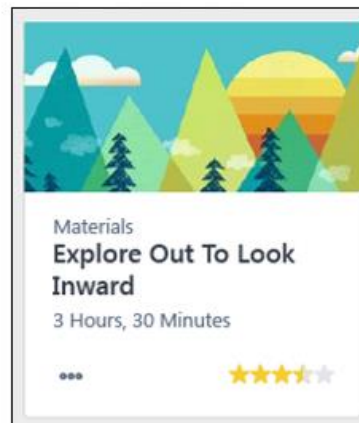
Transcript and Training Tiles

The Learner Home and Learning Search page both display training items in tile format. These tiles display differently depending on the following:

- If the training is currently on the user's transcript, the training item displays as a transcript tile
- If the training is not on the user's transcript, the training item displays as a training tile

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning



Transcript Tiles

A transcript tile displays for training items that are already on the user's transcript. Training that is marked as Removed does not display as a transcript tile. Transcript tiles may display in any of the below locations:

- Continue Learning carousel
- Saved for Later carousel
- Learning Search

Transcript Tile Information

Each transcript tile displays the following information:

- **Thumbnail Image** - The image associated with the training item displays at the top of each tile.
- **Training Type** - This field displays the type of the training item, such as online class, curriculum, material, etc.
- **Title** - This field displays the title of the training item.

- **Status** - This field displays the current transcript status of the training.

Note: *The tile is clickable and re-directs the user to the Training Details page for the training item.*

Transcript Tile Actions

Each transcript tile provides access to the following actions:

- **Primary Transcript Action** - The bottom-right corner of each transcript tile provides quick access to the current primary action on the user's transcript for the specific training item. For example, if the current action for the training on the user's transcript is Launch, a Launch link displays in the bottom right corner of the tile. **Note:** *When a training item is inactive, **Inactive** appears as the Primary Transcript Action. This option is not clickable.*
- **Options** - Click the "..." icon to access the following secondary actions:
 - **Secondary Transcript Actions** - Any other available transcript actions available to the user for the training item appear in the Options drop-down menu and allow the user to perform the associated action on the training. *See [Transcript \(Universal Profile\) - Status and Options for all available actions](#). **Note:** *Clicking some transcript actions causes the user to be redirected to their learning transcript.**
 - **Save for Later** (if available) - Click this link to save the training item. Saved training items display in the Saved for Later section on the Learner Home page. Any training item available to the user or on their transcript can be saved except for certifications, and there is no limit on the number of items which can be saved.
 - **Remove from Saved** (if available) - This link is only available if the training has already been saved by the user. Click this link to remove the training item from the Saved for Later section.

Unsupported Transcript Tile Actions

If a training item has any of the following actions available, the action will be grayed out and not clickable. If a user needs to perform any transcript actions not supported by Learner Home or Learning Search, they can do so from their transcript. The following transcript actions are NOT supported by Learner Home or Learning Search:

- All actions for the Posting training type
- Unlock
- Launch Locally
- Upload & Verify (Materials)
- Authenticate (Curricula)

Training Tiles

A training tile displays for training items that are NOT on the user's transcript, which includes training that is on the user's transcript but is marked as Removed. Training tiles may display in any of the below locations:

- Saved for Later carousel
- Top Picks for User carousel
- Trending for Your Position carousel
- Inspired by Your Subjects carousel
- Most Popular carousel
- Learning Search

Each training tile displays the following information:

- **Thumbnail Image** - The image associated with the training item displays at the top of each tile.
- **Training Type** - This field displays the type of the training item, such as online class, curriculum, material, etc.
- **Title** - This field displays the title of the training item.
- **Duration** - This field displays the duration of the training. **Note:** *if the duration is 0, this field does not display.*
- **Average Rating** - The bottom-right corner of each training tile displays the average star rating for the training. The numeric value of the average rating displays (e.g. 4.2) when the user hovers over the stars. The rating displayed here respects settings in Course Ratings Preferences. Ratings do not display if any of the following are true:
 - The backend setting for Course Ratings is not enabled.
 - Course Ratings are not enabled for the user.

Note: *The tile is clickable and re-directs the user to the Training Details page for the training item.*

Training Tile Actions

The training tile displays all available actions in the options drop-down:

- **Options** - Click the "..." icon to access the following actions:
 - **Launch** (if available) - Click this option to launch the training. This adds the training item to the user's transcript, and the training attempts to open in a new window. The page will then refresh to the transcript. **Note:** *This option does not display if the backend setting to launch from training details is not enabled and this option is only available for Materials, Online Classes, Quick Courses, and Videos.*
 - **Request** (if available) - Click this option to request the training. This adds the training item to the user's transcript. The page will then refresh to the transcript.
 - **Add to Cart** (if available) - Click this option to add the training to your shopping cart. After the user clicks this option, the page refreshes to the shopping cart page.
 - **Save for Later** (if available) - Click this link to save the training item. Saved training items display in the Saved for Later carousel on the Learner Home page. Any training item available to the user or on their transcript can be saved except for certifications, and there is no limit on the number of items which can be saved.

- **Remove from Saved** (if available) - This link is only available if the training has already been saved by the user. Click this link to remove the training item from the Saved for Later section.

Learner Home Preferences

On the Learner Home Preferences page, administrators can set the display order of Learner Home content and add custom banners to the Learner Home page. Learner Home Preferences are set by division.

To access Learner Home Preferences, go to **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > LEARNER HOME PREFERENCES**. Select the division for which you want to configure preferences.

Note: *It is possible to set Learner Home preferences by an organizational unit (OU) other than division, but this is not self-configurable. Contact Global Product Support to set Learner Home preferences by one of the following OUs:*

- Position
- Location
- Grade
- Cost Center
- Group
- Custom OU Type

Permissions

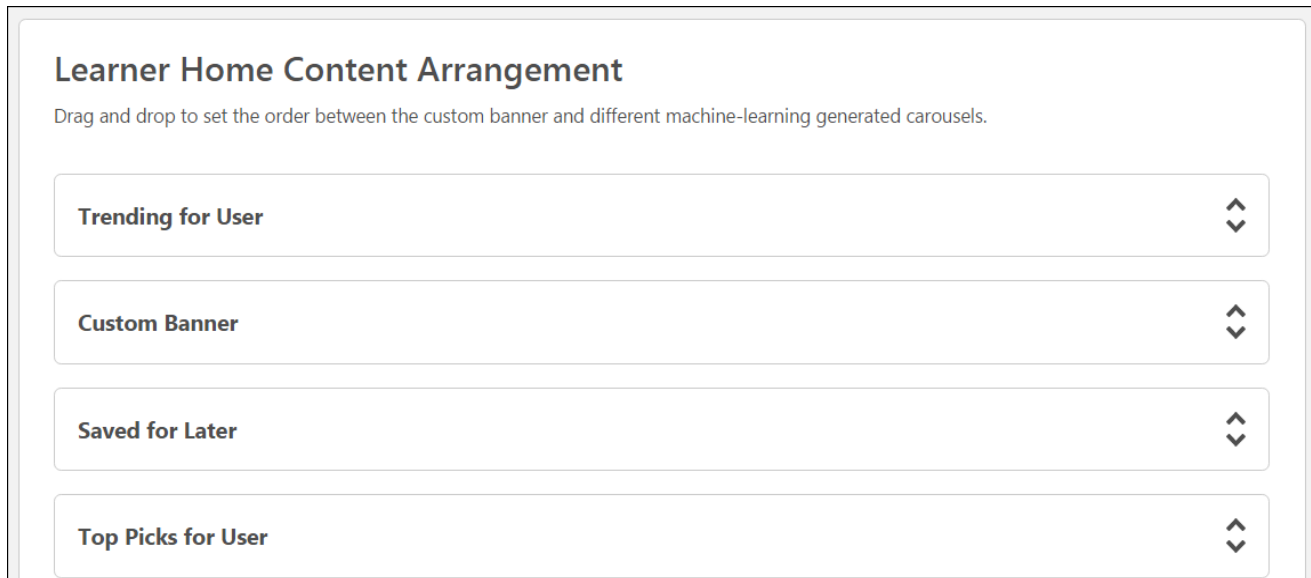
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home Preferences	Grants access to the Learner Home Preferences page, where the administrator can configure the arrangement of content on Learner Home, as well as other settings. This permission can be constrained by organizational unit (OU) and User's OU. This is an administrator permission.	Learning - Administration

Learner Home Content Arrangement

In the Learner Home Content Arrangement section, you can determine the display order of the different Learner Home sections. The sections you can arrange include:

- Custom Banner
- Continue Learning
- Saved for Later
- Top Picks for User
- Trending for User
- Inspired by Your Subjects
- Most Popular

To rearrange the display order of the different sections, you can click and drag any section to a new place in the order. You **MUST** click the **SAVE** button at the bottom of the browser window to save any changes you have made to this section before navigating away from the page.



Custom Banner Configuration

In the Custom Banner Configuration section, you can upload up to four banner images which will be rotated in the Learner Home banner carousel. Each of the banner images displays in a drop-down with the following information:

- **Thumbnail preview image** - A small version of the uploaded banner image displays, if a banner image has been uploaded.
- **Image Number** - This field displays the banner number. Up to four banner images can be displayed in the banner carousel.
- **Status** - This field displays whether the banner image is enabled or disabled. If no image has been uploaded, or the administrator does not want to show the configured banner in the carousel, the banner's status is Disabled. If the banner has been configured for the carousel and the admin wants to show it in the carousel, its status is Enabled. Clicking on the **Enabled** or **Disabled** status allows the administrator to toggle between the two options.
- **Display Text** - This field only displays if the **Enable Display Text** option was enabled for the image. If enabled, this field shows the display text entered for the image.
- **Button Text** - This field only displays if the **Enable Action Button** option was enabled for the image. If enabled, this field shows the button text provided for the button.
- **Link URL** - This field only displays if the **Enable Action Button** option was enabled for the image. If enabled, this field shows the URL provided for the button.

Configure Banner

To configure a banner image for the carousel:





1. Click the Expand icon for one of the image drop-downs. You can either change an existing image or expand a drop-down for a disabled image to add a new image to the carousel.

2. Either click the **SELECT IMAGE** button and choose a banner image from your computer, or drag and drop a banner image from your computer desktop into the uploading zone. After the image uploads, a thumbnail version of the image appears above the uploading zone. If needed, you can click the Delete icon next to the thumbnail to remove the image and upload a new one. The following specifications apply:
 - Recommended image dimension: 915x280
 - Supported image file types: bmp, gif, jpg, jpeg, png
 - Maximum image file size: 5MB
 3. If desired, you can add additional features to the banner image. Available features you can add to the banner image include:
 - **Enable Display Text** - Check this box to add text that will display over the banner image in the Learner Home banner carousel. When the box is checked, you can enter text into the text field. There is a limit of 140 characters for this field.
 - **Enable Action Button** - Check this box to add a button to the banner that will navigate users to a system location of your choice when clicked. When the box is checked, you can enter button text in the text field and provide a link to the page users will be navigated if they click the button. The button text is limited to 20 characters. For example, to allow users to navigate quickly to their learning transcript, you could create an action button for the banner using text that says "My Transcript" and the URL for the learning transcript page. If you would like the button to open the link for a page in a new window instead of navigating the user to the page using the current browser window, you can check the **Open Link in New Window** option.
- Note:** *The text and button for the banner images do not support localization.*
4. Click the **See Preview** link to preview the banner as it will appear on the Learner Home page. **Note:** *Any configured display text and action button will not be shown in this preview and can only be previewed via the Learner Home page.*
 5. Configure up to four banner images for the Learner Home banner carousel. After configuring the Learner Home banner images for the selected division, you **MUST** click the **SAVE** button at the bottom of the browser window to save any changes you have made to this section before navigating away from the page.

Note: *A non-configurable introduction banner automatically displays on the Learner Home above the carousels. The introduction banner and the custom banners configured by administrators can never display on the Learner Home at the same time. The custom banner will only appear on the Learner Home after the user adds subjects or dismisses the introduction banner.*

Custom Banner Configuration

Banners are shown in this order on the Learner Home page. Display text will be placed over the uploaded image and links can be defined using a custom button. In order to not display the Custom Banner carousel, all banners must be Disabled.

	Image #1 Status: Disabled Display Text: Welcome to the Learner Home! Button Text: Access Help Here Link URL: www.cornerstoneondemand.com	▼
	Image #2 Status: Disabled (Missing Image)	▼
	Image #3 Status: Disabled (Missing Image)	▼
	Image #4 Status: Disabled (Missing Image)	▼


Overwrite Custom Settings

Choose whether or not to enable the setting to overwrite custom settings for child division organizational units (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 toggled to the On position, 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.

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 or Cancel

To save any changes made to this preferences page, you **MUST** click the **SAVE** button at the bottom of the browser window. To leave this page without saving any changes, you can either click **CANCEL** or navigate away from the page.

Learner Home - Default Training Image Preferences

The Default Training Images Preferences page allows administrators to configure default thumbnail images for different training types. The thumbnail images set here are applied to any training that does not have a custom thumbnail image set for it via the Course Catalog. This means that the random image logic will no longer apply. These new default images apply to the following pages:

- Browse for Training landing page and tile view
- Course Console pages
- Course Recommendations on Training Completion page
- Learner Home
- Learning Search Tiles









To access the Default Training Images Preferences page, go to **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > DEFAULT TRAINING IMAGE PREFERENCES**. The preferences set on this page are portal-wide preferences. Default training image preferences cannot be set by division.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Default Training Image Preferences	Grants access to Default Training Image Preferences page where an administrator can configure custom default images for training by type. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Default Training Image Preferences

Use these preferences to configure default images per training type. These images are used when a training-specific image is not provided.

 <p>Certification</p> <p>Upload Image</p>	 <p>Curriculum</p> <p>Upload Image</p>	 <p>Cohort</p> <p>Upload Image</p>	 <p>Event</p> <p>Upload Image</p>
 <p>External Training</p> <p>Upload Image</p>	 <p>Library</p> <p>Upload Image</p>	 <p>Material</p> <p>Upload Image</p>	 <p>Online Class</p> <p>Upload Image</p>

Default Training Image Preferences

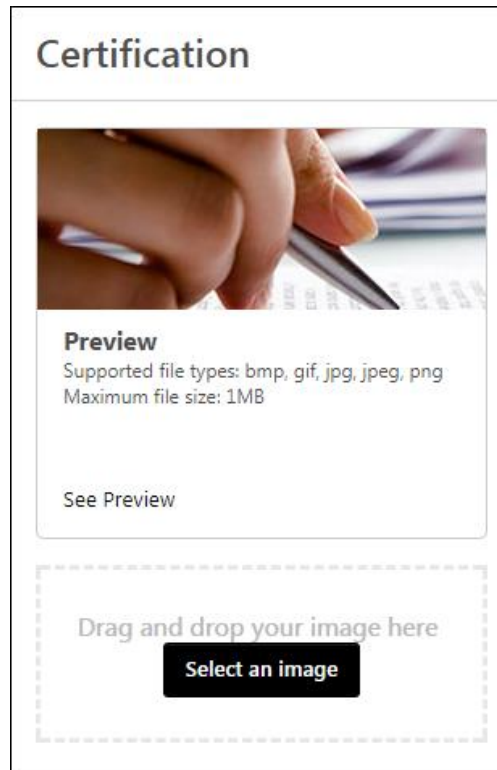
Default training image preferences can be set for the following training types:

- Certification
- Curriculum
- Cohort
- Event
- External Training
- Library
- Material
- Online Class
- Posting
- Program
- Quick Course
- Session
- Test
- Video

To configure a default image for a training type:

1. Click the **Upload Image** link for the desired training type. This opens a flyout on the left side of the page.
2. Either click the **SELECT AN IMAGE** button to search for and select an image from your computer, or drag and drop an image from your computer desktop into the image upload zone in the flyout.

3. After uploading an image, click the **See Preview** link to preview the image in the Preview section.
4. Click the **SAVE** button to save the new image as the default image for training type, or click the **CANCEL** button to discard the image without affecting the default image settings for the training type.



To reset the default image for a training type back to the Cornerstone provided image:

1. Click the **Reset** link for the desired training type. This opens a modal on the page. **Note:** *This option only appears if a custom default image has been uploaded for the training type (i.e. not the image provided by the system).*
2. Click the **YES** button to reset back to the default image for the training type, or click the **NO** button to return to the Default Training Image Preferences page without affecting the default image settings for the training type.

Note: *Resetting to the default image discards the previous image that was uploaded for the training type. It cannot be restored.*

Image Specifications

- Recommended image dimensions: Aspect ratio of 2:1, and image size of 660x336. The minimum recommended size is 220x112.
- Supported image file types: bmp, gif, jpg, jpeg, png
- Maximum image file size: 1MB

Learner Home Image Specifications Impact

With the August 2017 release of Learner Home and Learning Search, the thumbnail images set for system training items will display differently in different system locations. Training thumbnail images may appear for training on the following pages:

- Learner Home
- Learning Search
- Browse for Training (landing page and tile view)
- Course Recommendations on the Training Completion Page
- Course Console

Learner Home and Learning Search present training thumbnail images in a rectangular format, while all other system locations using training thumbnail images present the images in a square format. Depending on how and when your organization plans to roll out Learner Home and Learning Search to users, different thumbnail image sizes may be recommended.

See [Learner Home Preparations](#) for information about how to prepare your portal for the release of Learner Home.

See the matrix below for information about how differently sized training thumbnail images will display in your portal after the August 2017 release:

LEARNER HOME ROLL OUT PLAN	SHAPE	DEFAULT TRAINING IMAGE PREFERENCES PAGE	LEARNER HOME AND LEARNING SEARCH	BROWSE FOR TRAINING - TILE VIEW AND LANDING PAGE	COURSE RECS ON TRAINING COMPLETION PAGE	COURSE CONSOLE
Roll out to all users	Rectangular	Rectangular image, with an aspect ratio of 2:1 and image size of 660x336 is recommended. The minimum recommended size is 220x112.	No impact to Learner Home or Learning Search, as the image will fit in the rectangular container	No impact, as this page will no longer be used	The rectangular image will fit the container, but white space will be present above and below the image to preserve the aspect ratio	The image will fit as expected, with some blank space on the right side
Roll out to all users	Square	Rectangular image, with an aspect ratio of	The top and bottom of the	No impact, as this page will	No impact, as the image will continue to fit	No impact, as the image

LEARNER HOME ROLL OUT PLAN	SHAPE	DEFAULT TRAINING IMAGE PREFERENCES PAGE	LEARNER HOME AND LEARNING SEARCH	BROWSE FOR TRAINING - TILE VIEW AND LANDING PAGE	COURSE RECS ON TRAINING COMPLETION PAGE	COURSE CONSOL E
		2:1 and image size of 660x336 is recommended. The minimum recommended size is 220x112.	image will be cropped evenly by 50px to fit within the rectangular container. Only the center of the square image will be visible on Learner Home and Learning Search	no longer be used	the square container	will continue to fit as expected
Roll out to some users	Rectangular	Rectangular image, with an aspect ratio of 2:1 and image size of 660x336 is recommended. The minimum recommended size is 220x112.	No impact to Learner Home or Learning Search, as the image will fit in the rectangular container	The rectangular image will fit the container, but white space will be present above and below the image to preserve the aspect ratio	The rectangular image will fit the container, but white space will be present above and below the image to preserve the aspect ratio	The image will fit as expected, with some blank space on the right side
Roll out to some users	Square	Rectangular image, with an aspect ratio of 2:1 and image size of 660x336 is	The top and bottom of the image will be cropped evenly by	No impact, as the image will fit the square container	No impact, as the image will continue to fit the square container	No impact, as the image will continue to fit as

LEARNER HOME ROLL OUT PLAN	SHAPE	DEFAULT TRAINING IMAGE PREFERENCES PAGE	LEARNER HOME AND LEARNING SEARCH	BROWSE FOR TRAINING - TILE VIEW AND LANDING PAGE	COURSE RECS ON TRAINING COMPLETION PAGE	COURSE CONSOL E
		recommended. The minimum recommended size is 220x112.	50px to fit within the rectangular container. Only the center of the square image will be visible on Learner Home and Learning Search			expected
No immediate plans to roll out	Rectangular	Square image in size 200x200 is recommended	No impact, as Learner Home and Learning Search will not be used in this case	The rectangular image will fit the container, but white space will be present above and below the image to preserve the aspect ratio	The rectangular image will fit the container, but white space will be present above and below the image to preserve the aspect ratio	The image will fit as expected, with some blank space on the right side
No immediate plans to roll out	Square	Square image in size 200x200 is recommended	No impact, as Learner Home and Learning Search will not be used in this case	No impact, as the image will fit the square container	No impact, as the image will continue to fit the square container	No impact, as the image will continue to fit as expected

Note: The default images provided are stored as squares on the backend.

Image Samples

The following images show the impact of using square or rectangular images in various system areas, following the August 2017 release:

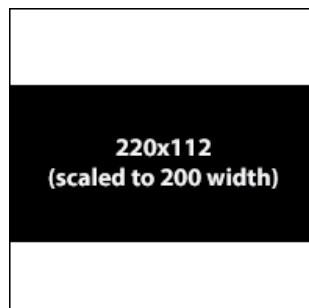
Square Image Cropped to Fit Rectangular Container

In this example, the top and bottom of the image are cropped evenly by 50 px to fit within the rectangular container. Only the center of the square image will be visible. For example, if you keep your thumbnail images in a square shape, this is how a square image will display as a thumbnail on the Learner Home page and Learning Search page. Square images will continue to fit other system areas optimally.



Rectangular Image Applied to Square Container (blank space above and below)

In this example, the rectangle image fits the square container, but white space is added above and below image to maintain the image's aspect ratio. For example, if you change your training thumbnail images to a rectangular shape, this is how a rectangular image will display on the Training Completion page. Training image thumbnails will display optimally on the Learner Home and Learning Search pages, however.



Rectangular Image Applied to Square Container (blank space on right side)

In this example, the image fits mostly as expected, with some blank space on the right side of the image. For example, if you change your training image thumbnails to a rectangular shape, this is how a rectangular image will display on the Course Console page. Training image thumbnails will display optimally on the Learner Home and Learning Search pages, however.

The screenshot shows a 'Course Console' for 'Sample Course Console Training'. The page is divided into several sections:

- Header:** 'Sample Course Console Training' with a star icon and a dropdown arrow.
- Provider:** A&B
- Price:** \$0.00
- Training Hours:** 0 Hours, 0 Minutes
- Credits:** 0
- Mobile:** Off (with a 'breadcrumbs' button)
- Exclude from Recommendations:** Off
- Subjects:** N/A
- Available Languages:** English (US)
- Keywords:** N/A
- Description:** N/A (with an 'Edit' link)
- Right Sidebar:**
 - Online Class (with a blue square icon)
 - 1.0 (with a document icon)
 - Active (with a power icon)
 - N/A (with a calendar icon)
 - 0 (0 Reviews) (with a star icon)
 - See Training Units (with a gear icon)
- Image Placeholder:** A black square in the top right corner containing the text '220 x 112'.

Image Continues to Fit Square Container

In this example, there is no impact, as the square image still fits the square container. For example, if you leave your training image thumbnails in a square shape, this is how a square image will fit the Browse for Training page and other system areas which use square images. Square images will not display optimally on the Learner Home or Learning Search pages, however.



Learning Experience Platform (LEP) - Learning Search

Learning Experience Platform (LEP) - Learning Search - Overview

Prior to this enhancement, users could search for and find training using the Global Search page.

With this enhancement, users have access to the Learning Search page, which is a fast-performing, mobile-optimized search page that provides learners with an engaging learning exploration experience. The Learning Search page provides a collection of filters which allow users to find training they want to take, and also provides access to transcript and training tiles which allow users to quickly resume existing training or request new training.

Use Case

Ted is a data analyst at Acme Corp. Ted is interested in learning more about machine learning, which his colleagues have told him might help him better interpret data he is responsible for analyzing and communicating to others at the organization.

He navigates to the Learner Home page in Acme's learning management system and enters a search for "machine learning." Related training results appear, and then Ted filters the search for training items that are only 30 minutes to an hour in duration.

Ted finds a video that looks promising and launches it directly from the search page. Within an hour, he learns enough to apply a commonly used machine learning algorithm to one of his data sets. Using his new machine learning knowledge, he is able to gain some meaningful insights from the data, which he includes in his report.

Considerations

The Learning Search page can only be used to search for training items. Users can use the Learning Search page to search for all training types EXCEPT the following:

- Sessions
- Cohorts
- Certifications
- Postings

Implementation

This functionality is automatically enabled for all portals using the Learning module . The permissions to access Learner Home and Learning Search are automatically added to the System Administrator security permissions role. Administrators can add these permissions to other security roles when needed.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning

The following updated permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events Calendar	Grants access to view Events Calendar page. This permission also makes the Event Calendar button on the Learning Search page visible. This is an end user permission.	Learning

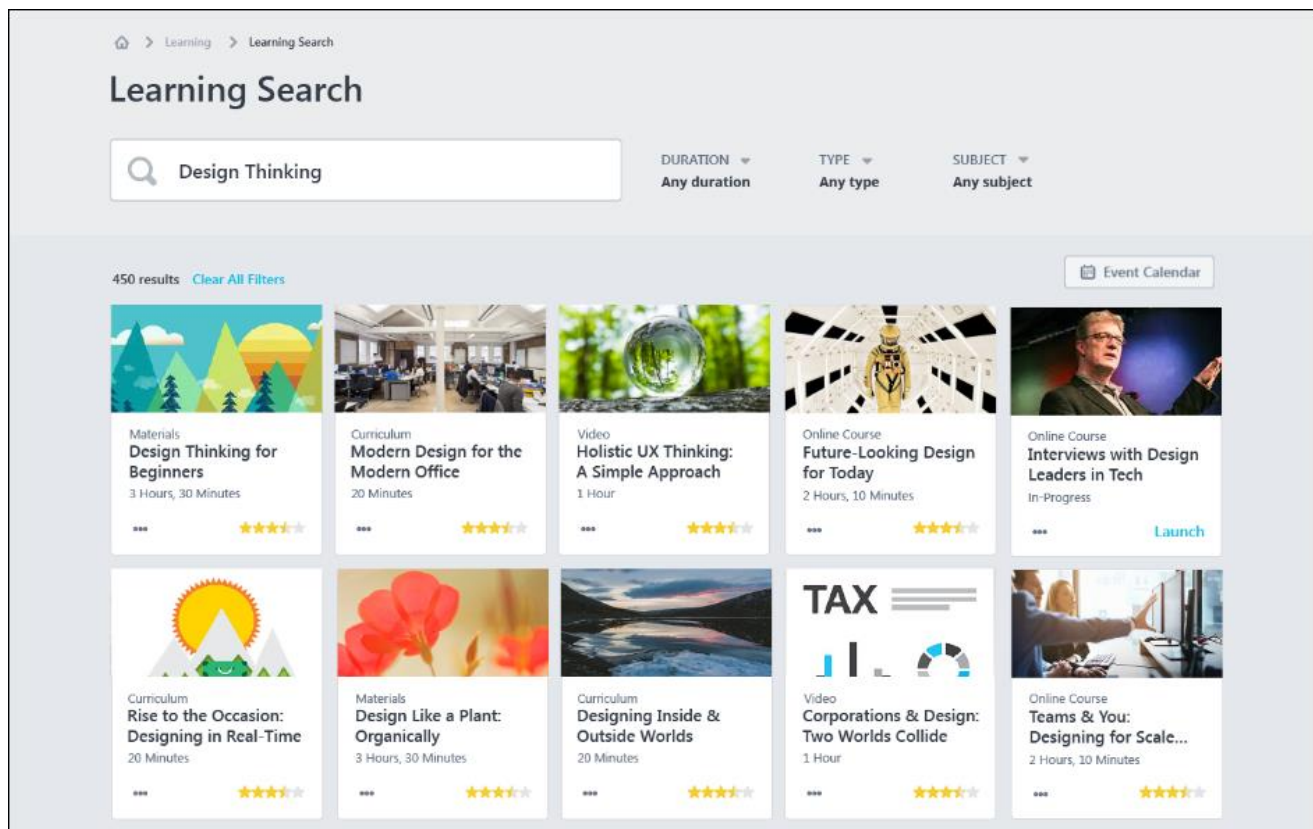
Learning Search Page

The Learning Search page allows users to search for and filter training in the system. The robust filter options make it easy for users to find training. Learning Search is accessed via the Learner Home page, and is fully optimized for both desktop and mobile browsers. [See Learning Experience Platform \(LEP\) - Learner Home on page 321 for additional information.](#)

To access Learning Search, go to **LEARNING > LEARNER HOME** and either enter search criteria into the search bar at the top of the page and press Enter, or press Enter without entering any criteria into the search bar to return all results.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events Calendar	Grants access to view Events Calendar page. This permission also makes the Event Calendar button on the Learning Search page visible. This is an end user permission.	Learning
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning



Search

To search for a specific training item or training related to a key phrase, enter a search term into the search bar and press the Enter key on your keyboard. The search will return training results with the entered phrase in the title, keywords, and description. Results are prioritized first by the presence of the entered phrase in the training's title, then in the training's keywords, and lastly in the training's description. For example:

If the search term, "Leadership" is entered in the search bar:

1. Training with the word "Leadership" in the title displays first in search results.
2. Training with the word "Leadership" specified as a keyword for the training displays in search results AFTER training with "Leadership" in the title.
3. Training with the word "Leadership" in the training's description displays in search results AFTER training with "Leadership" in the training title and in training keywords.

You can also press the Enter key on your keyboard without entering search terms or simply click the Search icon, which causes the search page to return all available training results based on the user's availability.

Filters

The following drop-down filters are available to help users narrow their search results:

- Duration - From this single-select drop-down menu, users can select a training time duration. For example, if you wish to only view training which takes less than an hour to complete, you can select the **<1 hour** filter option. **Note:** *The Duration filter options are static and do not change. These cannot be configured by an administrator.* Available **Duration** filter options include:
 - Any duration
 - <15 minutes
 - <30 minutes
 - <1 hour
 - <2 hours
 - 2+ hours
- **Type** - From this multi-select drop-down menu, users can select a specific training type. For example, selecting the **Curriculum** option causes the search results to refresh and only display curricula training. The following training types are available in the **Type** drop-down menu:
 - Curriculum
 - Event
 - Library
 - Material
 - Online Class
 - Program
 - Quick Course
 - Test

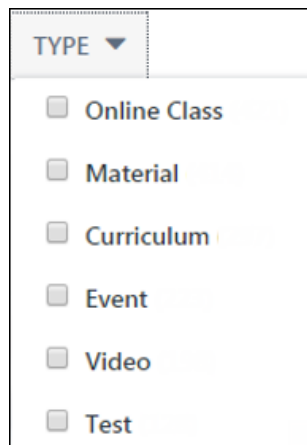
- Video

Note: The following training types are NOT available to select from the **Type** filter: Sessions, cohorts, certifications, and postings.

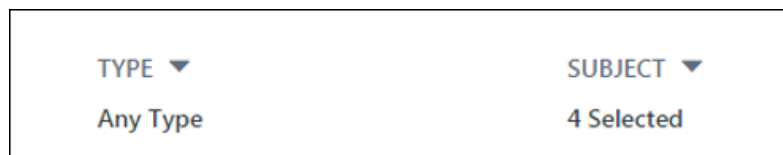
Note: The Type filter options are dynamic and display based on availability. For example, if the user does not have availability for tests, test learning objects do not display as an option in the Type filter.

- **Subject** - From this multi-select drop-down menu, users can select a training subject. For example, if an organization has created a training subject called "Safety," users can select this subject from the **Subject** filter, and the search results will refresh to show only training items associated with the Safety subject. **Note:** Up to ten subjects display in this drop-down, and the subjects selected are based on the most popular subjects within the current search results. Popularity is determined by the number of training items to which the subject applies.

Note: The Subject filter options are dynamic and display the most commonly associated subjects that match to the displayed training results. This is determined by the number of training items to which the subject is associated. Up to 10 Subjects will display in the drop-down sorted by the number of training items the subject matches to with the top subject displayed firsts.



All three drop-down menus either display the number of options that are selected or indicate that all options are selected. For example, if the user has selected four subjects in a drop-down, then "4 Selected" displays beneath the filter. This text displays when the drop-down menu is not expanded. If nothing has been selected, then "Any Duration," "Any Type," or "Any Subject" display, depending on the drop-down menu. This quickly shows users which filters are currently set on the search page.



To remove all filters that have been applied, click the **Clear All Filters** link.

Event Calendar

Click the **EVENT CALENDAR** button to navigate to your Events Calendar page. From the Events Calendar page, you can view upcoming sessions. **Note:** *This button only displays if the user has permission to access the Events Calendar. See Events Calendar for more information about the Events Calendar page.*

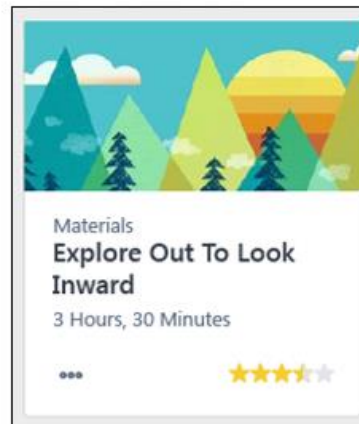
Results

Training search results on the Learning Search page appear in tile format, with up to 25 training results displaying on each page of search results. To view additional pages of search results, either click a specific page number below the search results or click the navigation arrows to move chronologically through the search results pages. Search results are sorted by relevance, and text queries are matched with content title, descriptions, and keywords.

The tiles on Learning Search display differently depending on the following:

If the training is currently on the user's transcript, the training item displays as a transcript tile

If the training is not on the user's transcript, the training item displays as a training tile



Transcript Tiles

A transcript tile displays for training items that are already on the user's transcript. Training is marked as Removed does not display as a transcript tile.

Transcript Tile Information

Each transcript tile displays the following information:

- **Thumbnail Image** - The image associated with the training item displays at the top of each tile.
- **Training Type** - This field displays the type of the training item, such as online class, curriculum, material, etc.

- **Title** - This field displays the title of the training item.
- **Status** - This field displays the current transcript status of the training.

Note: *The tile is clickable and re-directs the user to the Training Details page for the training item.*

Transcript Tile Actions

Each transcript tile provides access to the following actions:

- **Primary Transcript Action** - The bottom-right corner of each transcript tile provides quick access to the current primary action on the user's transcript for the specific training item. For example, if the current action for the training on the user's transcript is Launch, a Launch link displays in the bottom right corner of the tile. **Note:** *When a training item is inactive, **Inactive** appears as the Primary Transcript Action. This option is not clickable.*
- **Options** - Click the "..." icon to access the following secondary actions:
 - **Secondary Transcript Actions** - Any other available transcript actions available to the user for the training item appear in the Options drop-down menu and allow the user to perform the associated action on the training. *See [Transcript \(Universal Profile\) - Status and Options for all available actions](#). **Note:** *Clicking some transcript actions causes the user to be redirected to their learning transcript.**
 - **Save for Later** (if available) - Click this link to save the training item. Saved training items display in the Saved for Later section on the Learner Home page. Any training item available to the user can be saved except for certifications, and there is no limit on the number of items which can be saved.
 - **Remove from Saved** (if available) - This link is only available if the training has already been saved by the user. Click this link to remove the training item from the Saved for Later section.

Unsupported Transcript Tile Actions

If a training item has any of the following actions available, the action will be grayed out and not clickable. If a user needs to perform any transcript actions not supported by Learner Home or Learning Search, they can do so from their transcript. The following transcript actions are NOT supported by Learner Home or Learning Search:

- All actions for the Posting training type
- Unlock
- Launch Locally
- Upload & Verify (Materials)
- Authenticate (Curricula)

Training Tiles

A training tile displays for training items that are NOT on the user's transcript, which includes training that is on the user's transcript but is marked as Removed.

Each training tile displays the following information:

- **Thumbnail Image** - The image associated with the training item displays at the top of each tile.
- **Training Type** - This field displays the type of the training item, such as online class, curriculum, material, etc.
- **Title** - This field displays the title of the training item.
- **Duration** - This field displays the duration of the training. **Note:** *if the duration is 0, this field does not display.*
- **Average Rating** - The bottom-right corner of each training tile displays the average star rating for the training. The numeric value of the average rating displays (e.g. 4.2) when the user hovers over the stars. The rating displayed here respects settings in Course Ratings Preferences. Ratings do not display if any of the following are true:
 - The backend setting for Course Ratings is not enabled.
 - Course Ratings are not enabled for the user.

Note: *The training tile is clickable and re-directs the user to the Training Details page for the training item.*

Training Tile Actions

The training tile displays all available actions in the options drop-down:

- **Options** - Click the "..." icon to access the following actions:
 - **Launch** (if available) - Click this option to launch the training. This adds the training item to the user's transcript, and the training attempts to open in a new window. The page will then refresh to the transcript.
 - **Request** (if available) - Click this option to request the training. This adds the training item to the user's transcript. The page will then refresh to the transcript.
 - **Add to Cart** (if available) - Clicking this option re-directs the user to the Training Details page for the training item.
 - **Save for Later** (if available) - Click this link to save the training item. Saved training items display in the Saved for Later carousel on the Learner Home page. Any training item available to the user can be saved except for certifications, and there is no limit on the number of items which can be saved.
 - **Remove from Saved** (if available) - This link is only available if the training has already been saved by the user. Click this link to remove the training item from the Saved for Later section.

Offline Player New Version - Overview

With this enhancement, the following fixes have been made to a new version of the Offline Player:

- Offline Player can be used through a network proxy without receiving an error
- The total time recorded for training is accurately recorded
- Special characters can be used in usernames and passwords without producing an error when users log into the Offline Player

Implementation

It is not necessary to download the new version of the Offline Player unless your organization is experiencing exceptions to the above behaviors with its current version of Offline Player. If one of the above fixes is required, download the new version of the Offline Player. There is no additional cost associated with this functionality.

Online Course Pop-Up Blocker Enhancement - Overview

Prior to this enhancement, learners were not able to launch online courses if their browser's pop-up blocker was activated.

With this enhancement, the system recognizes whether the browser's pop-up blocker is activated, and if so, prompts learners to click on a message which then opens the online course.

Use Case

Dennis is a disaster relief volunteer who needs to use the Cornerstone Learning application to take training courses. The browser on his computer has a pop-up blocker enabled which prevents unwanted pop-ups. When he attempts to launch an online course, the system recognizes that the browser is using a pop-up blocker and displays a message to Dennis, asking if he would like to launch the training. After he clicks to confirm, the online course opens and Dennis can take the training.

Considerations

This enhancement only applies to online courses accessed through the web platform; courses accessed through the mobile application are not supported.

This enhancement applies to online courses launched from all of the following system areas:

- User Transcript
- Browse for Training
- Course Catalog
- Course Console
- Course Publisher
- Deep Links

Implementation

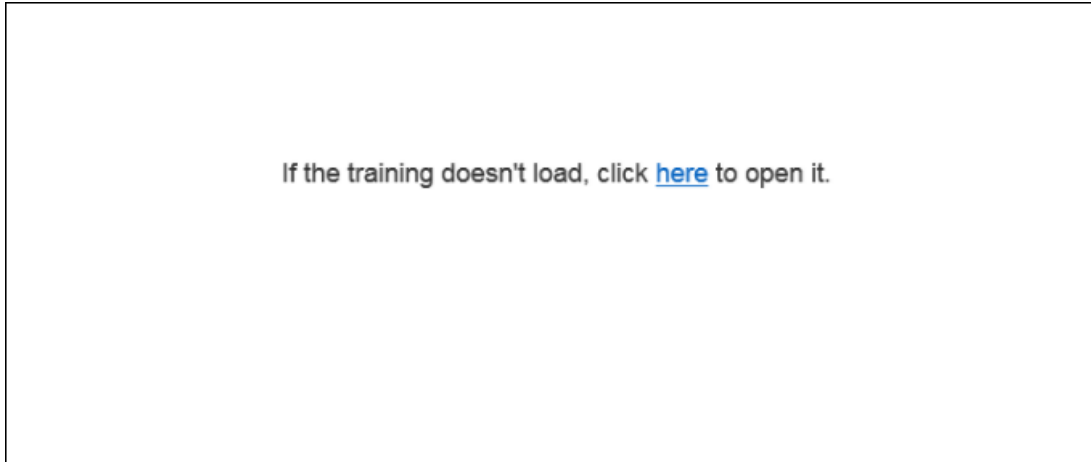
This functionality is automatically enabled for all portals using the Learning module.

Pop-Up Blocker Message

When a user attempts to launch an online course using a browser with a pop-up blocker enabled, the following occurs:

1. The system analyzes the browser to determine whether or not the online course was successfully launched.

2. If the online course was not launched, the user receives a message in the browser window which says, "If the training doesn't load, click [here](#) to open it." **Note:** *This display is localized into all available languages.*
3. If the user clicks the linked word "[here](#)," the online course will then open in a pop-up window.



Roster Completion Date Modification Audit Trail

Roster Completion Date Modification Audit Trail - Overview

Prior to this enhancement, when an administrator modified an instructor-led training (ILT) session completion date for a user via the session roster, the audit trail history always recorded the time of the change as 11:59 PM, along with the completion date selected by the administrator.

With this enhancement, when an administrator modifies a user's completion date for a session, the exact date and time that the change occurred is recorded in the audit trail history. The completion date timestamp also reflects the last session part end date timestamp.

Implementation

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



Permissions

The following existing permission applies to this functionality:

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

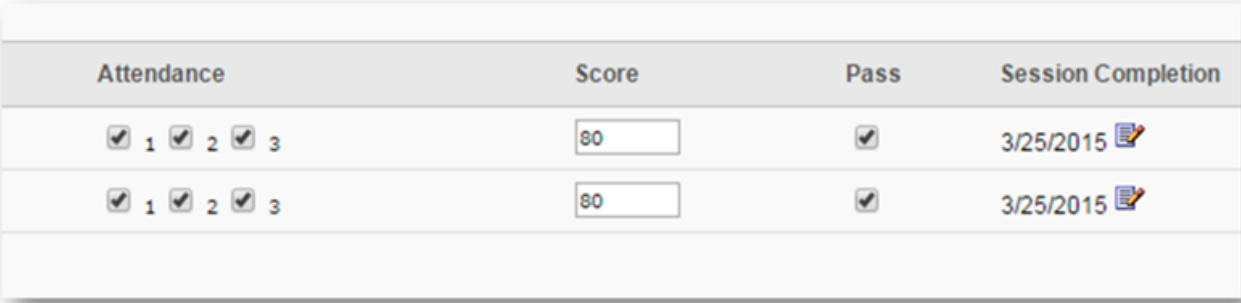
Roster Completion Date Audit Trail



When a learning administrator individually modifies the completion date of a user from the Attendance and Scoring page of an instructor-led training (ILT) session, an exact time stamp for the change, along with relevant user information, displays in the Transcript Modification History for the user, which ensures 21 CFR Part 11 and GxP compliance.

To access the ILT session roster, go to **ILT > MANAGE EVENTS & SESSIONS**. Search for the appropriate event and next to the event in the search results, in the Options column, click the View Sessions icon . Next to the appropriate session, in the Options column, click the View Roster icon .

Permissions

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



Attendance	Score	Pass	Session Completion
<input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3	<input type="text" value="80"/>	<input checked="" type="checkbox"/>	3/25/2015 
<input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3	<input type="text" value="80"/>	<input checked="" type="checkbox"/>	3/25/2015 

Attendance and Scoring

When an administrator accesses the Attendance and Scoring tab of a session roster, any change made to the Session Completion date field for a user is recorded in the user's Transcript Modification History with the time and date the change occurred. The completion date timestamp also reflects the last session part end date timestamp.

History ✕
Reverted by Laurence Barral on 4/7/2017 5:25:27 AM
Completed by Laurence Barral on 10/1/2016 04:00:00PM
Modified by Admin (Admin User ID) on 4/12/2017 11:25 AM Comments: From "10/26/2012 8:52:01AM"
To "10/1/2016 04:00:00 PM".
Registered by Cory Carr on 7/24/2012 7:30:44 AM
Assigned by Lori Muller on 7/24/2012 7:30:42 AM Comments: Initial Request

xAPI Learning Reporter - Full Rollout

xAPI Learning Reporter - Full Rollout - Overview

Prior to this enhancement, the Learning Reporter was released as a beta version to allow learners to record external learning activities and transfer them to the transcript. As a beta version, the Learning Reporter could only run on a Chrome browser with an English US interface.

See [xAPI Learning Reporter](#) for general information about using the Learning Reporter.

See [Transcript - xAPI Learning Records](#) for information about managing learning experiences from the transcript page.

See [Tin Can \(xAPI\)](#) for general information about the xAPI integration.

With this enhancement, the Learning Reporter is no longer in beta, and the following features have been added:

- The Learning Reporter can operate on the following browsers:
 - IE 10, IE 11, and Edge
 - Chrome
 - Firefox
- All system languages are supported by the Learning Reporter
- When the Learning Reporter widget is viewed in a language that is read from right to left, the widget features are aligned to the right of the widget, and the Learning Reporter widget is aligned to the left side of the browser
- Users can view which version of Learning Reporter they are using

[Click here to access the Starter Guide for the xAPI Learning Reporter.](#)

Use Cases

Use Case 1

Lynda is a marketing manager at ACME, and she is responsible for conducting market trend research. Lynda frequently reviews related articles and videos and wants to add some of them to her transcript as learning records to highlight her continued professional development. Lynda accesses her transcript page and downloads the Learning Reporter widget to her browser's bookmarks toolbar. Now she can report on external learning experiences she engaged in while using the internet.

Use Case 2

Emily is a marketing manager at ACME who needs to articulate research about HR Strategy in Life-Science organizations. Emily started looking for relevant data from different sources. After she watched a TED video, she wants to add it as a learning record to her transcript.

Emily clicks the Learning Reporter widget she added to her bookmarks toolbar and views the Learning Reporter options. She selects the **Video** activity option, rates the learning

experience, and sends it to her transcript. The new learning activity displays on her Completed transcript.

Considerations

- Mobile support is not included in this enhancement.
- If content security is enabled on a certain domain (e.g. github.com) to block bookmarks, the Learning Reporter cannot function, and the user receives an error when attempting to use it.
- Rating data is stored in the Learning Record Store, but this data can only be retrieved via a backend report.
- It is possible to configure an integration with an existing SP initiated SAML SSO to allow users to bypass the login page of the Learning Reporter when recording learning experiences. Please contact Global Product Support for more information.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
xAPI - View Learning Records on Transcript	Allows users to view xAPI Learning Records on the Transcript.	Learning
xAPI - View Learning Reporter Option on Transcript	Allows users to view the Learning Reporter option on Transcript.	Learning - Administration

Right to Left Language Orientation

With this enhancement, when a learner uses the Learning Reporter in a language that is read from right to left, the features of the Learning Reporter widget are all aligned to the right side of the widget.

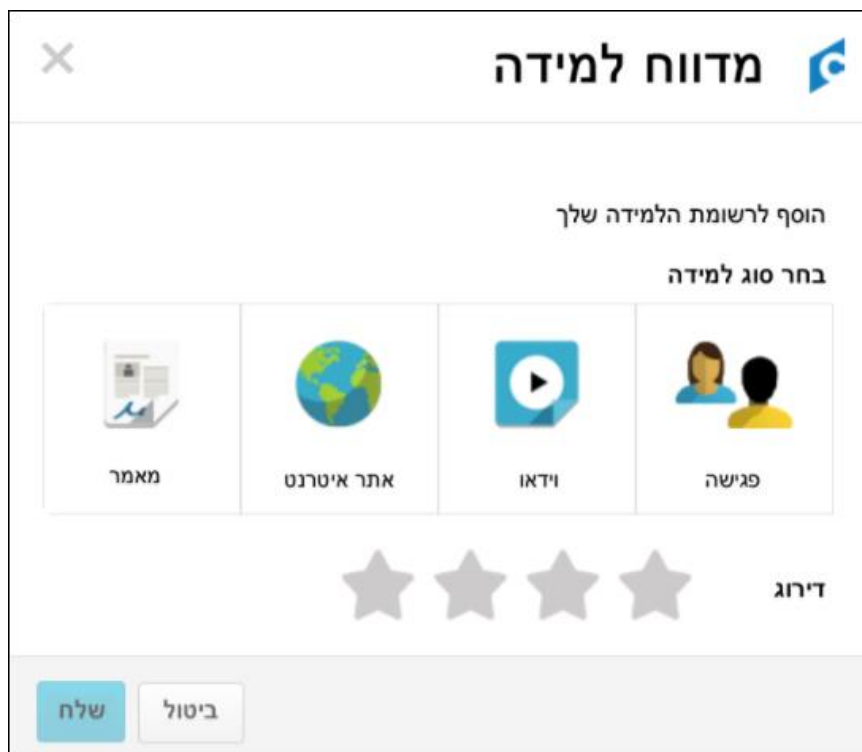
After a user clicks the Learning Reporter widget saved to their bookmarks toolbar, in order to record a learning experience, the Learning Reporter pop-up window appears. The Learning Recorder provides the user with information and options for recording their learning experience.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
xAPI - View Learning Records on Transcript	Allows users to view xAPI Learning Records on the Transcript.	Learning
xAPI - View Learning Reporter Option on Transcript	Allows users to view the Learning Reporter option on Transcript.	Learning - Administration

Right to Left Language Orientation

When the Learning Reporter widget is viewed in a language that is read from right to left, the widget features are aligned to the right of the widget:



Left to Right Language Orientation

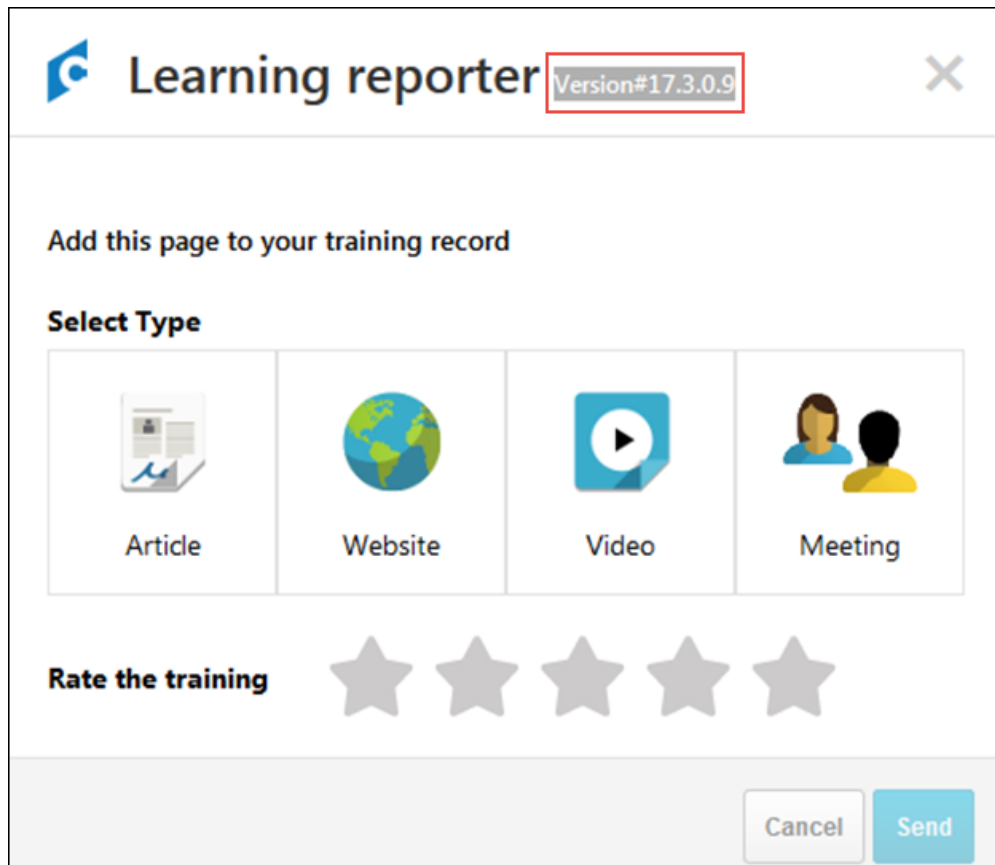
When the Learning Reporter widget is viewed in a language that is read from left to right, the widget features are aligned to the left of the widget:



Learning Reporter Version

With this enhancement, users can easily view which version of the Learning Reporter they are using by highlighting the white space to the right of the Learning Reporter text on the Learning Reporter widget.

To view the Learning Reporter version number, click the area immediately to the right of the text that reads, "Learning Reporter" at the top of the Learning Reporter widget and drag your cursor over the white space to reveal the version number in white font.



Mobile

Mobile - Language Detected Login

Prior to this enhancement, all mobile application login pages were displayed in English. Once a user was logged in, the application was displayed based on the portal's language configuration for the user.

With this enhancement, mobile application login pages are localized based on the default language of the user's device. As previously implemented, after the user is logged in, the application is displayed based on the portal's language configuration for the user.

This enhancement applies to all pages that are visible before authentication, including the Start, Login, Login with SSO, Login with PIN, and Register Device pages.

Use Cases

Paul works for Acme Corp. in France. The default language for his mobile device is French. With this enhancement, every time Paul opens the Cornerstone mobile application, the login page is displayed in French.

Considerations

The device's default language only impacts the mobile application's login page. After the user is logged in, the application is displayed based on the portal's language configuration for the user.

If Cornerstone does not have a language pack that is an exact match of the user's language and region, then the language that most closely matches the user's language is used. For example, if the user's device language is set to Spanish-Mexico and their region is Venezuela, then the application attempts to match the Spanish-Mexico-Venezuela language. If Spanish-Mexico-Venezuela is not available, then the application attempts to match the Spanish-Mexico language. If Spanish-Mexico is not available, then the first available Spanish language is used.

If the device's default language is not supported by Cornerstone's language package, the login pages are displayed in English.

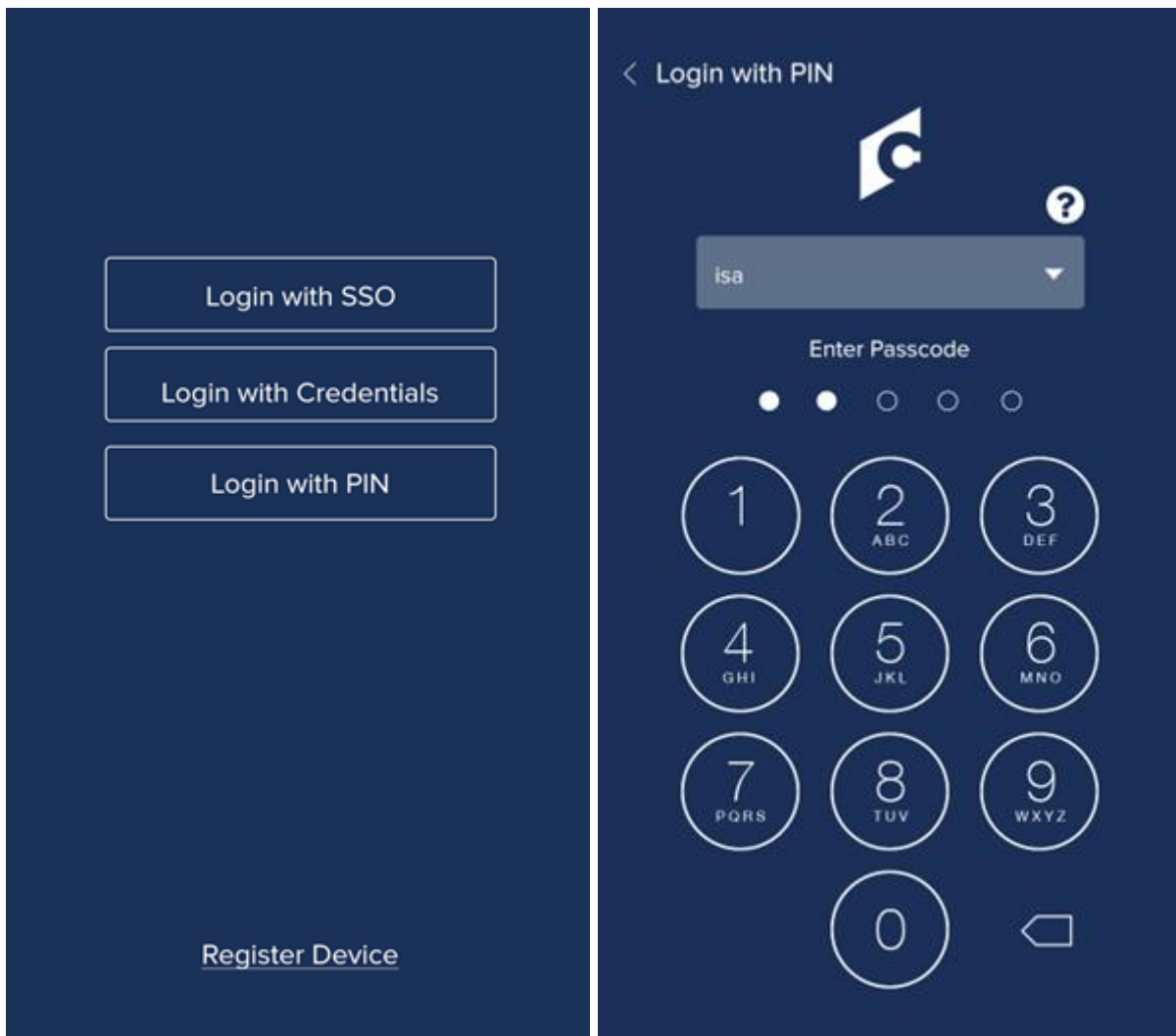
Implementation

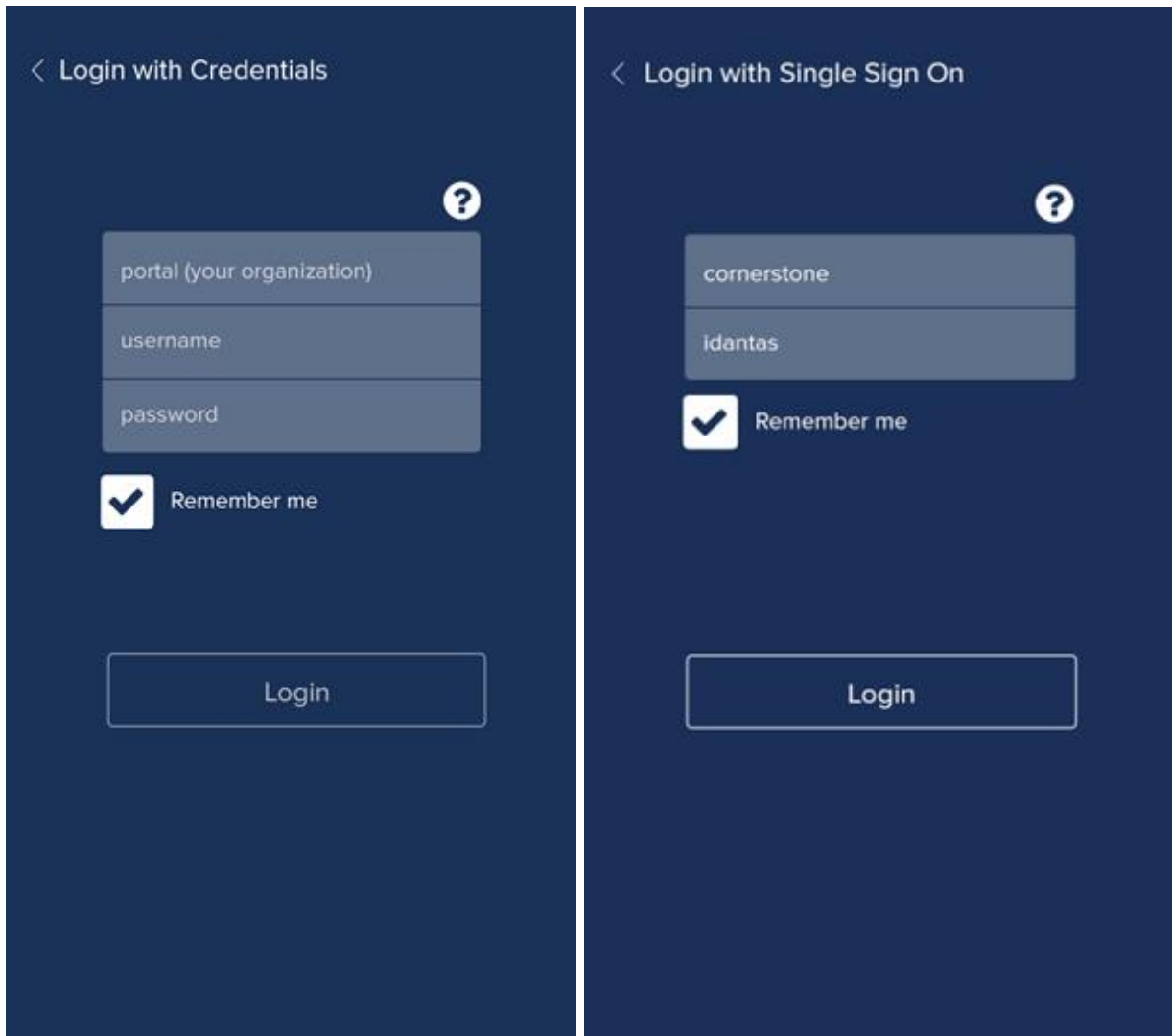
This functionality is automatically enabled for all organizations using the latest version of the Cornerstone mobile application.

Mobile - Login Page UI Enhancements

Minor enhancements have been made to the Cornerstone mobile application's login pages for an updated look and feel.

- Buttons have rounded corners.
- Button text and borders are white.
- Text fields have rounded borders.
- On the main Login page, the Register Device option is underlined.
- When logging in with credentials, the page is renamed from Login to Login with Credentials.
- The Login button is only enabled when all fields are completed.
- The Portal field is renamed to "portal (your organization)."
- The icons on the login fields are removed.





Implementation

This functionality is automatically enabled for all organizations using the latest version of the Cornerstone mobile application.

Performance

Custom Reports - Goal Fields

A Goal Creation Date field is now available in the Goals section when creating a custom Goals report or a multi-module custom report. In addition, a Target Stretch and Target Threshold field are now available in the Targets section when creating a custom Goals report. This enables organizations to obtain additional context when reporting on goals.

Goals Section

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Goal Creation Date	This field displays the date on which the goal was created. This value is displayed in the time zone of the logged in user. This value is pulled from the Goal History .	Date/Time

Targets Section

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Target Stretch	This field displays the stretch value for the goal target. This value is displayed using the decimal precision that is configured for the portal. These values can be viewed when managing the goal .	Numeric
Target Threshold	This field displays the threshold value for the goal target. This value is displayed using the decimal precision that is configured for the portal. These values can be viewed when managing the goal .	Numeric

Implementation

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

Security

The following existing permissions apply to this functionality:

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

	Subordinates.	
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

End User Performance Pages UI Redesigns

With this enhancement, the Scheduled Tasks, Launch Off Cycle Review, and Performance Review Summary pages are redesigned to help administrators execute their workflows in a more pleasing user interface. There are no functional changes to the page, only an update to the look and feel of the page.

To view your scheduled tasks, go to **HOME > SCHEDULED TASKS**.

The Launch Performance Review page can be accessed in the following manners:

- Click the **Launch Off-Cycle Task** link from the Performance Review Details page.
- Click the **LAUNCH REVIEW** button from the Performance Review Summary page.
- Click the **Launch Review** link for a subordinate in My Team > Activities or My Team > Performance > Reviews.

To access the Performance Review Summary page, go to **PERFORMANCE > PERFORMANCE REVIEWS**.




Previous UI - Scheduled Tasks

Scheduled Tasks

Tasks

Title: Type:

Show completed and expired tasks (3 Results)

Title	Description	Status	Start Date	Due Date
 2015 Compensation Task	This is a pay for performance plan to reward ...	In Progress	7/2/2015	12/31/2015
 2015 Talent Conference Task	2015 Talent Conference Task	In Progress	9/30/2015	12/31/2015
 2015 Talent Conference Task - Most Recent Data	2015 Talent Conference Task	In Progress	9/30/2015	12/31/2015

New UI - Scheduled Tasks

Scheduled Tasks

Title Type All Types Search

Show completed and expired tasks

Title	Description	Status	Start Date	Due Date
Complete Self Project...	This is a review that can be launched from th...	Imcomplete	2/28/2017	4/14/2017
Complete Self Project...	This is a review that can be launched from th...	Imcomplete	2/28/2017	4/14/2017

Previous UI - Launch Off Cycle Review

Launch Performance Review

Performance Review

Who is this review for? Me Someone else User

Which review form would you like to use? Select Review Form

Cancel

Select User ×

Search is limited to 1000 records only

Last Name: First Name: ID: User Name: Manager's Last Name:

(2 Results)

Name	User ID	User Name	Manager
Moore, Simon	smoore	smoore	Tomm, Ingrid
Moore, Tracy	tracymoore	tracymoore	Street, Scott

Select Review Form ✕

Review Form: **Search**

(3 Results)

Review Form	Description
Client Project Review	This is an off-cycle performance review. Please rate the performance based on the specified time period.
Off-Cycle Performance Review	This is an off-cycle performance review. Please rate the performance based on the specified time period.
Project Review with Competency Assessment	Test competency summary

Cancel

New UI - Launch Off Cycle Review

Launch Performance Review

Who is this review for? Me
 Someone else

Which review from would you like to use?

Cancel Post

Select User ✕

Search is limited to 1000 records only.

Last Name:
First Name:
ID:
User Name:
Manager's Last Name

5 Results

Name	User ID	User Name	Manager
1, Admin		Admin1	
2, Admin		Admin2	
Aaron, Alex	aaaron	aaaron	Carter, Rebecca
Aaronson, Adam	EMP000023	aa123@csod.com	
Adams, Paul	padams	padams	Leone, Anthony
Adams, Susie	sadams	sadams	Miller, John
Admin, Addie	aadmin	aadmin	
admin, apac	apacadmin	apacadmin	
Admin, Ben	badmin	badmin	
Admin, Charlie	cadmin	cadmin	

Select Review Form ✕

Review Form

5 Results

Review Form	Description
Billable Project Review	This is a review that can be launched from the end user or manager level
Completed Project Feedback	This is a review that can be launched from the end user or manager level
Feedback on Project Review	Feedback on project with peer reviewer feedback. Peers selected by the Reviewee. (can be launched from the end user or manager level)
Performance Improvement Plan	This is a Performance Improvement Plan which outlines the issues at hand and how to address and improve them. This PIP is to be completed by the employee and manager and send to HR for final review.
Pulse Check-in	Ratings of current status and documentation of conversation between manager and employee

Previous UI - Performance Review Summary

Performance Review Summary - Carlos Santo

Performance Reviews

Title:

Show completed and expired tasks (18 Results)

Review	Description	Status	Start Date	Due Date
Complete 360 Self Review	This is a 360 feedback review which will provide useful information to the reviewee and result in a lifelong develop...	In Progress	12/2/2010	7/1/2011
Complete Manager 360 Review of Clark Cohen	This is a 360 feedback review which will provide useful information to the reviewee and result in a lifelong develop...	Not Started	12/2/2010	6/30/2011
Complete Manager 360 Review of Richard Martin	This is a 360 feedback review which will provide useful information to the reviewee and result in a lifelong develop...	Not Started	12/2/2010	6/30/2011

New UI - Performance Review Summary

Performance Review Summary - Jon Lolley

 **Launch Review**

Performance Reviews

My Assigned Reviews
My Personal Reviews

Title: **Q Search**

Show completed and expired tasks

Title	Description	Status	Start Date	Due Date
 Complete Self Review	This is a review for 2016. Please rate the employee on their...	Incomplete	8/26/2016	9/5/2016

(1 Result)

Implementation

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

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Launch Off-Cycle Performance Review Task	Enables a user to launch an off-cycle performance review task. Having this permission does not guarantee that the user can launch an off-cycle review, only that they will have access to the Launch Performance Review page. A task must still be configured properly for the user to successfully launch an off-cycle review task. This permission works only if user has been designated to launch at least one currently active off-cycle performance review task. This permission can be constrained by Employee Relationship. This is an end user permission.	Performance
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

<p>View Performance Reviews</p>	<p>Grants ability to view the Performance Reviews page, which displays a user's own past performance reviews as well as performance review task steps they've been assigned to complete. This also grants ability to view the Batch Rating page. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an end user permission.</p>	<p>Performance</p>
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English (UK) Language Pack Update

Prior to this enhancement, for the English (UK) language pack, the term "Objective" was appearing throughout most of the user interface. However, a few places were showing as "Goal."

With this enhancement, for the English (UK) language pack, the term "Goal" is updated to "Objective" throughout the system, including Custom Reports and Manage Shared and Dynamic Goals. This creates a consistent experience for users of the English (UK) language pack.

The following table includes a list of previous translations and new translations that are included in this update:

PREVIOUS TRANSLATION	NEW TRANSLATION
Allow feedback requests on goals	Allow feedback requests on objectives
Allow goal progress updates in review	Allow objective progress updates in review
Allow user to Create Goals for other employees (other than self and subordinates). This is an administrator permission.	Allow user to Create Objectives for other employees (other than self and subordinates). This is an administrator permission.
Allow users to see progress, comments and attachments of manager goals and alignable goals	Allow users to see progress, comments and attachments of manager objectives and alignable objectives
Collapse goal	Collapse objective
Collapse user goals	Collapse user objectives
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 ratings comparisons ineffective.	Compare individual reviewee ratings within a task review section for Question sections and Competency sections. Note: this report does not return results for Objective sections, as objectives are generally unique to each individual, making ratings comparisons ineffective.
Current goal progress	Current objective progress
Delete goal	Delete objective
Dynamic Goal Process Assignment event	Dynamic Objective Process Assignment event
Expand user goals	Expand user objectives
Goal assigned to you	Objective assigned to you
Goal assignment	Objective assignment

PREVIOUS TRANSLATION	NEW TRANSLATION
Goal creation date	Objective creation date
Goal has been modified by another user	Objective has been modified by another user
Goal modification	Objective modification
Goal options	Objective options
Goal rating comment	Objective rating comment
Goal rating commented by (ID)	Objective rating commented by (ID)
Goal rating commented by (name)	Objective rating commented by (name)
Goal rating review weighting	Objective rating review weighting
Goal rating score	Objective rating score
Goal rating title	Objective rating title
Goal target date	Objective target date
Goals	Objectives
Grants ability for manager (or others depending on constraints) to view, edit and manage progress of Goals for their direct and indirect subordinates via MyTeam and Talent Profile.	Grants ability for manager (or others depending on constraints) to view, edit and manage progress of Objectives for their direct and indirect subordinates via MyTeam and Talent Profile.
Include Feedback responses on Goals in Review	Include Feedback responses on Objectives in Review
Manage Subordinate Goals	Manage Subordinate Objectives
Manage Subordinates - Goals	Manage Subordinates - Objectives
Manage Subordinate Goals	Manage Subordinates Objective
New goal	New objective
Performance review goal rating section	Performance review objective rating section
Request structured feedback on goals	Request structured feedback on objectives
Snapshot - Goals	Snapshot - Objectives
Subordinate Employee Goal Status Summary	Subordinate Employee Objective Status Summary
Subordinate's Goals	Subordinate's Objectives
This goal must be aligned to another goal.	This objective must be aligned to another objective.
Total goal progress	Total objective progress
Total weighting of goals in the current period	Total weighting of objectives in the current

PREVIOUS TRANSLATION	NEW TRANSLATION
cannot exceed 100%	period cannot exceed 100%

Implementation

This functionality is automatically enabled for all organizations using the Performance module and the English (UK) language pack.

Performance Review Distribution Report - Z-Score Calibration

Prior to this enhancement, performance review task calibration was performed based on raw ratings without a simple way to understand relative performance in the context of teams, divisions, or locations.

With this enhancement, organizations can select specific cohorts and see a performance review z-score, which provides insight into how a particular reviewee is performing relative to the average of their team, division, location, or position.

Advanced Criteria - Performance Review Data Set

When setting the criteria for the Performance Review Distribution Report, a new **Performance Review Data Set** field is now available.

From the drop-down menu, select the cohort type that will be used to calculate the z-score values. The report will compare each users' ratings with the average rating of other users in the same cohort.

The following options are available:

- Manager - This option is selected by default.
- Division
- Location
- Position


Performance Review Distribution

Report Criteria

Search for a specific review task and optionally set user criteria to display a distribution report.

USER CRITERIA

User Criteria: ▼

 **All users in Division: Central (Central)** Include Subordinates

ADVANCED CRITERIA

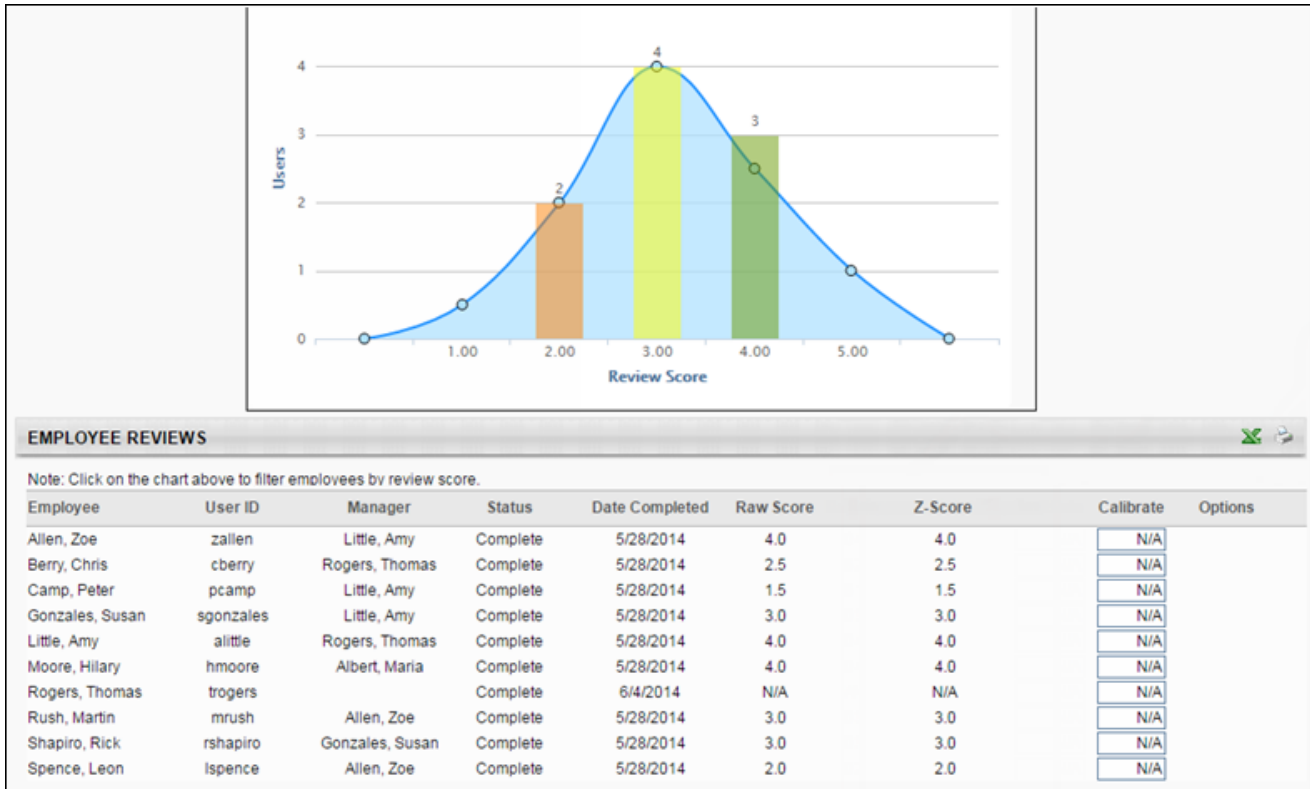
Performance Review Task: ▼

Performance Review Data Set: ▼

Report Output - Z-Score

The Z-Score column provides each user's Z-Score, which represents how the user's rating compares to the average rating within the selected cohort. This value is based on the performance review data set that is selected. For example, if "Manager" is selected, then the Z-Score value is in relation to all of the user's manager's subordinates within the availability (i.e., the user's peers). If "Position" is selected, then the Z-Score value is in relation to all of the user's within the availability in the user's position.

The Z-Score value is only displayed if the cohort size is large enough to make a valid analysis.



Use Case

XYZ Corporation is nearing the end of their annual performance review process and is starting the calibration process. They understand that some managers are tougher raters than their peers and want to help move this particular rater bias.

When looking at the Performance Review Distribution Report, the Talent Business Partner can see the z-score for each employee, which may provide additional insight into the final calibration.

For example, two managers have similar performing teams. However, Manager 1 is a tougher rater, and rates between 2-4, while Manager 2 rates between 3-5. When comparing z-scores, an overall rating of 4 from Manager 1 may be the equivalent of an overall rating of 5 from Manager 2, as indicated by similar z-scores.

Considerations

Because z-score values are calculated using Cornerstone's Machine Learning Platform, z-score values are updated based on the following:

- In Stage portals, z-scores are only updated during User Acceptance Testing (UAT).
- In Production portals, z-scores are regularly updated.
- In Pilot portals, z-scores are not available. In Pilot portals, this field is always displayed "N/A."

Implementation

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

Glossary

- Z-Score - A measure of how many standard deviations below or above the population mean a raw score is. A z-score is also known as a standard score and it can be placed on a normal distribution curve. When comparing specific data sets, comparing the z-score may provide insight to management on where employees fall in their distribution curve compared to the averages of their cohorts.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Distribution Report - Calibration	Grants ability to adjust final overall rating for performance reviews when viewing the Performance Review Distribution report. This permission works in conjunction with the Performance Review Distribution Report permission. This permission cannot be constrained. This is an administrator permission.	Performance - Administration
Performance Review Distribution Report	Grants access to Performance Review Distribution Report, which provides a graphical representation of the distribution of ratings for a given performance review task. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User's Subordinates.	Reports - Performance

Universal Profile: Snapshot Widgets Responsive UI Design

Universal Profile: Snapshot Widgets Responsive UI Design

With this enhancement, the Snapshot: Competencies, Snapshot: Development Plans, and Snapshot: Reviews pages are now responsively designed so that users can easily view and use these pages from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size.

Development plan progress, competency ratings, and performance review ratings are moved to the right. To ensure alignment with portal branding and performance management best practices, all scores are displayed as black text. Configurable text color may be available in a future release.

A new **CREATE NEW PLAN** button is now available on the Snapshot: Development Plans page to allow users to quickly create a new development plan. In addition, users now designate a primary plan from the Options menu for a plan rather than an option directly on the page.

The following changes have been made to the performance review options when viewing the Reviews page for another user:

- The Print Review - Manager's Version option is renamed to Print Review - Manager Version.
- The Print Review - Reviewee's Version option is renamed to Print Review - Reviewee Version.

Considerations

The following pages are not impacted by this enhancement:

- Snapshot: Main Page
- Snapshot: Goals
- Feedback

Implementation

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

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. This permission can be	Universal Profile

	<p>constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. Note: <i>For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.</i></p> <p>With the Aug '17 release, this permission also allows end users to view the Completions & Hours field, the training sidebar, and the Continue Learning carousel on the Learner Home page.</p>	
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Development Plans - Manage	Grants ability to create, edit and manage development plans for self (and others depending on role and permissions). This is an end user permission.	Performance
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Snapshot - Competencies	Enables user to view the Competencies widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i>	Universal Profile
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Snapshot - Development Plans	Enables user to view the Development Plans widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i>	Universal Profile
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Snapshot - Reviews	Enables user to view the Reviews widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i>	Universal Profile
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Snapshot	Enables user to view the Snapshot page for users within their	Universal
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Main - View	<p>permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i></p>	Profile
View Goals	<p>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.</p> <p>Managers must have the Snapshot - Goals permission to view the Universal Profile - Snapshot page and the My Goals page for users within their permission constraints.</p>	Performance

Snapshot: Competencies

With this enhancement, the Snapshot: Competencies page is now responsively designed so that the users can easily view and use this page from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size.

Competency ratings are moved to the right and appear as black text. The rest of the functionality on this page is unchanged.

To access the Snapshot: Competencies page, go to **HOME > UNIVERSAL PROFILE**. Select the Snapshot tab. Then, select the Competencies widget.

Permissions

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

Competency Ratings

My Team ▼

Sort By: Rating ▼

<p>Core Competencies Assessment</p> <p>Status : Not Started Due Date : 12/31/2014</p>	0/5 ▼
<p>Core Competencies Assessment</p> <p>Status : Not Started Due Date : 12/31/2012</p>	0/5 ▼

Snapshot: Development Plans

With this enhancement, the Snapshot: Development Plans page is now responsively designed so that the users can easily view and use this page from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size.

In addition, the following changes have been made to the page:

- Development plan progress is moved to the right and appears as black text.
- A new **CREATE NEW PLAN** button is now available on the page to allow users to quickly create a new development plan.
- The Primary Plan is now indicated by a label. The Primary Plan label appears below the Due Date value for the development plan that is designated as the user's primary plan.

To access the Snapshot: Development Plans page, go to **HOME > UNIVERSAL PROFILE**. Select the Snapshot tab. Then, select the Development Plans widget.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Development Plans - Manage	Grants ability to create, edit and manage development plans for self (and others depending on role and permissions). This is an end user permission.	Performance
Snapshot - Development Plans	Enables user to view the Development Plans widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i>	Universal Profile

The screenshot shows a 'Development Plan' interface. At the top, there is a 'Create New Plan' button, a 'My Direct Reports' dropdown, and an 'Options' dropdown. Below these are filters: 'Sort By: Create Date', 'Display Cancelled Plans', and 'Hide Completed and Past Due Plans'. The main content area lists two plans:

Plan Name	Due Date	Status	Created	Progress
Sales Manager Plan for Promotion	9/15/2017	In Progress	6/15/2017	19% Complete
Team Leader Plan for Promotion	9/15/2017	In Progress	6/15/2017	0% Complete

The 'Sales Manager Plan for Promotion' has an orange 'Primary Plan' label below its due date.


Create New Plan

Select the **CREATE NEW PLAN** button to create a new development plan.

This button is only available when viewing your own Snapshot: Development Plans page.

Primary Plan

The Primary Plan is now indicated by a label. The Primary Plan label appears below the Due Date value for the development plan that is designated as the user's primary plan.

Users can designate a plan as their primary plan by selecting the **Designate as Primary Plan** option from the **Options** menu  to the right of the appropriate plan.

Snapshot: Reviews

With this enhancement, the Snapshot: Reviews page is now responsively designed so that the users can easily view and use this page from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size.

Performance review ratings are moved to the right and appear as black text.

In addition, the following changes have been made to the performance review options when viewing the Reviews page for another user:

- The Print Review - Manager's Version option is renamed to Print Review - Manager Version.
- The Print Review - Reviewee's Version option is renamed to Print Review - Reviewee Version.

To access the Snapshot: Reviews page, go to **HOME > UNIVERSAL PROFILE**. Select the Snapshot tab. Then, select the Reviews widget.

Permissions

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

Reviews
My Direct Reports ▾
Options ▾

Sort By: Due Date ▾
 Display completed tasks

2016 Year End Performance Review --- ▾

Status : In Progress Review Period : 1/1/2016 - 12/31/2016 Start Date : 8/26/2016 Due Date : 2/12/2019

2015 Year End Performance Review --- ▾

Status : Incomplete Review Period : 1/1/2015 - 12/31/2015 Start Date : 1/4/2016 Due Date : 8/1/2016

Recruiting

Accurate Background Check Integration Enhancements

Accurate Background Check Integration Enhancements

With this enhancement, an applicant's references data will be passed to Accurate Background Check when a background check is performed on an applicant.

Prior to this enhancement, applicants had to manually enter their references when filling out a background check form with Accurate Background Check. The data was not passed from their application in Cornerstone to Accurate.

Use Case

Ashley, a candidate, enters her references when applying to a job. When Ashley is assigned a background check using the provider Accurate, her references information will be automatically passed to Accurate so that she does not have to re-enter the information in Accurate.

Implementation

This functionality is automatically enabled for portals that have an active integration with Accurate Background Check. It is also necessary to have Succession and Form Management enabled.

The Accurate Background Check integration must be enabled and activated through the Edge Marketplace. Portals must have already purchased Accurate Background Check in order to enable it in Edge.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Initiate Background Check	This permission grants access to manage background checks from the Applicant Profile page. This applies to background checks that have been configured in the Integration Center. This permission cannot be constrained. Users who have this permission will have an Assign to Applicant link in the background check status type panel on the Applicant Profile page. Once the background check is assigned, the page will display "Assigned - [Date Assigned]."	Recruiting
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration
Applicants: View Background Check Status	Allow user to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained.	Recruiting

<p>Applicants: View Background Check Status and Details Link</p>	<p>This permission allows users to view the background check status and view a link to access the background check report, which can be found in the background check status type panel on the Applicant Profile page. This permission cannot be constrained.</p>	<p>Recruiting</p>
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<p>Requisition: Manage</p>	<p>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.</p>	<p>Recruiting</p>
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<p>Requisition: Owner</p>	<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>	<p>Recruiting</p>
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<p>Requisition: Reviewer</p>	<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</i></p>	<p>Recruiting</p>
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*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.*

Question Bank - Reference Questions

In order for Accurate to retrieve the applicant's data, specific reference questions will need to be created in the Question Bank in Form Management so that the questions can be added to a form in Form Management that will be used to request the applicant's references.

The name of the question in Cornerstone does not need to match the name of the field in Accurate, but it must be mapped to the correctly corresponding field in Accurate in order for the data to pass successfully to Accurate.

There are three different sets of these questions, since applicants can submit up to three references. Each set represents one applicant reference. It is necessary to create each set. If more than three sets are created, any data outside of the first three sets will not be passed to Accurate.

Create Questions

To create the questions:

1. Navigate to **ADMIN > TOOLS > CORE FUNCTIONS > FORM MANAGEMENT > QUESTION BANK**.
2. Click **CREATE QUESTION**.
3. Select **Text** as the field type.
4. Configure each question separately by entering a name for the question in the **Question** field and entering the API exactly as it is listed in the right-hand column. The "Field Name in Accurate Background Check" column indicates the exact name of the field in Accurate. You can use the Accurate field name as your question or enter a different name, but the API will need to correspond exactly so that the applicant's data can be transferred successfully.

FIELD NAME IN ACCURATE BACKGROUND CHECK	ENTER THIS API IN THE API NAME FIELD ON THE CREATE QUESTION PAGE
SET 1	
Reference Name	Accurate_Reference_Name_1
Reference Phone Number	Accurate_Reference_Phone1_1
Reference Phone Number 2	Accurate_Reference_Phone2_1
Reference Email	Accurate_Reference_Email_1
Reference Relationship	Accurate_Reference_Relationship_1
Reference Street	Accurate_Reference_Street_1
Reference City	Accurate_Reference_City_1
Reference State	Accurate_Reference_State_1

FIELD NAME IN ACCURATE BACKGROUND CHECK	ENTER THIS API IN THE API NAME FIELD ON THE CREATE QUESTION PAGE
Reference Zip Code	Accurate_Reference_Zip_1
SET 2	
Reference Name	Accurate_Reference_Name_2
Reference Phone Number	Accurate_Reference_Phone1_2
Reference Phone Number 2	Accurate_Reference_Phone2_2
Reference Email	Accurate_Reference_Email_2
Reference Relationship	Accurate_Reference_Relationship_2
Reference Street	Accurate_Reference_Street_2
Reference City	Accurate_Reference_City_2
Reference State	Accurate_Reference_State_2
Reference Zip Code	Accurate_Reference_Zip_2
SET 3	
Reference Name	Accurate_Reference_Name_3
Reference Phone Number	Accurate_Reference_Phone1_3
Reference Phone Number 2	Accurate_Reference_Phone2_3
Reference Email	Accurate_Reference_Email_3
Reference Relationship	Accurate_Reference_Relationship_3
Reference Street	Accurate_Reference_Street_3
Reference City	Accurate_Reference_City_3
Reference State	Accurate_Reference_State_3
Reference Zip Code	Accurate_Reference_Zip_3

Create Question

Question Properties

Question *

API Name *

 Generate

Category *

Active

Advanced Options (Show)

Back
Cancel
Save

Create Form

Once you have created the questions, navigate to Form Management > **Manage Forms** and create a form for requesting an applicant's references, making sure to enter `Accurate_Reference_Form` in the **API Name** field on the Build tab. The purpose of entering this API name is so that the system knows the correct form to send to FADV. *See Build Tab - Define General Information.*

On the form, add the questions that you created above. The references request form will be **assigned to applicants on the Manage Applicants page**. The form will be available to the applicant from their My Profile page in the career site, where they can then launch and complete the form.

Active Fields by Requisition Template

Active Fields by Requisition Template Overview

With this enhancement, administrators can now hide certain fields on the General tab when configuring requisition templates. The fields will still appear on the requisition template for administrators, but they will not appear for recruiters when creating a requisition using the template.

Prior to this enhancement, requisitions used a pre-defined set of fields. Even if a standard field was not relevant to a position, the field still appeared. While requisitions could be customized by adding custom fields, the fields generally appeared on all requisitions, regardless of whether or not they were relevant. The presence of inappropriate fields could create confusion for recruiters and possibly result in bad data.

This enhancement allows recruiters to only see the fields that are relevant to the template, helping to reduce confusion about how to complete a field as well as streamline the requisition creation process.

Administrators can also pre-populate hidden fields on the template so that a value for the hidden field can be recorded for accurate reporting purposes.

Use Case

1. Hector wants to streamline the requisition creation process for Acme's recruiters, while ensuring alignment with local business and compliance needs.
2. Hector reviews Acme's requisition templates.
3. To minimize work for recruiters, he pre-populates fields with default information, as available.
4. He also configures each template so that fields that are not relevant to the position will be hidden on the requisition.
5. Jill Davis is a recruiter at Acme Co. who recruits for roles around the world.
6. When Jill goes to create a requisition, she now only sees the relevant, necessary fields, minimizing the work she has to do and ensuring requisitions are created properly.

Implementation

This functionality is automatically enabled for all organizations using Recruiting.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Default Requisition Template - Manage	Grants access to manage Default Requisition Template Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

<p>Requisition: Manage</p>	<p>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.</p>	<p>Recruiting</p>
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<p>Requisition: Owner</p>	<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>	<p>Recruiting</p>
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<p>Requisition: Submit Request</p>	<p>Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.</p>	<p>Recruiting</p>
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<p>Requisition: Reviewer</p>	<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</i></p>	<p>Recruiting</p>
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	<i>information about duplicate reviewer instances.</i>	
Requisition Template - Manage	Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration

Compliance Enablement Preferences

With this enhancement, the **Record EEO** field is moved from **Requisition and Applicant Preferences** to Compliance Enablement Preferences. This field enables administrators to allow the **EEO Category** field to appear on requisition templates and requisitions without being a required field.

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: Rec

Anonymize personal applicant data for New Submissions

Anonymize applicant data after the period of inactivity. (Once applicant information is anonymized

Period of Inactivity Setting

Enter number of days or months for the Period of Inactivity, after which applicant's data will be
The Period of Inactivity extends every time applicant logs back in the system.

Anonymize applicants' data after

Number of days to notify applicant via email prior to anonymizing applicant's data

Allow applicants to anonymize their own profiles (Once applicant information is anonymized, it ca

REQUISITION

The following settings apply to Requisitions for this Organizational Unit.

Record EEO (Display EEO Categories on the Requisition)

Require EEO Job Categories when creating requisitions

Allow Minimum Qualifications modification after a Requisition is opened

Only submissions that meet Minimum Qualifications count as Applicants in Reports

Display Applicant Warnings

Failed Pre-Screening

Incomplete Application

Unqualified Applicants

Record EEO

The **Record EEO** field is unchecked by default. This field controls the visibility of the **EEO Category** field on requisitions. The field always displays on requisition templates.

When this option is checked, the **EEO Category** field displays on the requisition. When the option is unchecked, the **EEO Category** field *does not* display on the requisition.

The ability to enable or disable the **Record EEO** field is dependent upon the **Require OFCCP Compliance Enablement functionality** field.

- If the **Require OFCCP Compliance Enablement functionality** field is checked, then the **Record EEO** field is checked automatically and cannot be disabled.
- If the **Require OFCCP Compliance Enablement functionality** field is unchecked, then the **Record EEO** field can be enabled or disabled.

Location/Division OUs

The visibility of the **EEO Category** field on requisition is also dependent upon the Location, Division, or Position OU that is being configured for Compliance Enablement Preferences. If the **Record EEO** field is disabled in Compliance Enablement Preferences for a specific OU, then the **EEO Category** field does not display on requisitions that are configured with that OU in the associated OU field on the requisition (e.g., **Location** field).

Requisition and Applicant Preferences

With this enhancement, the **Record EEO** field is moved from Requisition and Applicant Preferences to Compliance Enablement Preferences. The field will no longer appear in Requisition and Applicant Preferences.

To access Requisition and Applicant Preferences, go to **ADMIN > TOOLS > RECRUIT**. Then, select **Requisition and Applicant Preferences** from the General Recruitment section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition Preferences - Manage	Grants ability to access and manage Requisition Preferences. This permission cannot be constrained.	Recruiting Administration

Requisition and Applicant Preferences

Requisition Preferences

Default Date Range: (Defines the date range that displays in the search criteria area of the Mana

Default Requisition Template: (Enables Default Requisition Template for use when creating requisitions.)

Require Requisition Approval: (At least one approver must be present to save a requisition.)

Related Requisitions: (Enables users to create parent-child relationships between requisitions.)

Related Requisitions (Apply to Multiple Jobs): (Enables users to create and post Related Requisitions (Apply to Multiple Jobs)

Corporation Approver:

Compliance Preferences

Hide Application Data: (Application data displays as Hidden on the tabs on the Applicant Profile page except for the

Record EEO: (Display EEO Categories on the Job Requisition Form and Application Workflow.)

(

Applicant Opt-Out: Allows applicant to declare they do not want to be considered for other positions on both the App Candidate Search.

Requisition Templates and Default Templates







With this enhancement, the fields that display on requisitions can now be configured on individual requisition templates and default requisition templates. To enable this, a **Manage Field Visibility** option is added to the top-right of the General tab.

To create a requisition template, click the **Add Template** link from the **Requisition Templates** page.


To access Default Requisition Template Preferences, go to **Admin > Tools > Recruit > Default Requisition Templates**.

Permissions


PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Default Requisition Template - Manage	Grants access to manage Default Requisition Template Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Grades - View	Grants ability to view the Grade Organizational Unit throughout the system, such as in availability drop down selectors, when editing users, etc. Those without this permission do not see the Grade OU on any screen. This is primarily an administrator permission, although organizational policy should determine whether the Grade OU should be visible to end users on reporting screens, etc.	Core Administration
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration
Requisition Template - Manage	Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration
Requisition: View/Edit Salary Range	Grants ability to view and edit the salary range on a requisition and also grants visibility to the COMPENSATION.RANGE, JOB.COMPENSATION.RANGE.MAX, and JOB.COMPENSATION.RANGE.MIN tags within the Recruiting functionality. This permission cannot be constrained.	Recruiting

General	Job Ad	Application Workflow	Applicant Review
			
<p>Job Title: Account Manager</p> <p>Template Title: <input type="text" value="Account Manager - California"/> </p> <p>Template Description: <input type="text" value="Account Manager"/> </p> <p>Active: <input checked="" type="checkbox"/></p>			
DETAILS			
<p>*Each requisition must have a valid Requisition Facility Location Address to be searchable with geolocation. Geolocation is powered by Google. Additional location(s) can be added in order to make the requisition searchable in many locations on the Career Site. When location constraints are considered when determining whether internal Recruiting users should have access to the requisition, the requisition will be available if one or more of the requisition locations falls within the user's constraints.</p> <p>Display Job Title: <input type="text" value="Account Manager - California"/> </p> <p>Division: <input type="text" value="West"/> </p> <p>Location: <input type="text" value="California"/> </p>			

Manage Field Visibility

A **Manage Field Visibility** option  is added to the top-right corner of the page. This option enables administrators to select the standard and custom fields that they would like to hide on the job requisition. The purpose of hiding fields is to ensure that the requisition only includes fields that are relevant to the position.

To hide fields:


1. Click the **Manage Field Visibility** option . This opens the Manage Field Visibility pop-up. The pop-up lists all of the standard and custom fields that can be hidden. By default, all fields and sections are visible.

Manage Field Visibility X

Field	Visible on Requisition
Additional Location(s)	<input checked="" type="checkbox"/>
Grade	<input checked="" type="checkbox"/>
Cost Center	<input checked="" type="checkbox"/>
Contact Phone	<input checked="" type="checkbox"/>
Range	<input checked="" type="checkbox"/>
Minimum Qualifications	<input checked="" type="checkbox"/>
Ideal Qualifications	<input checked="" type="checkbox"/>
Keywords	<input checked="" type="checkbox"/>
Owner(s)	<input checked="" type="checkbox"/>
Hiring Manager	<input checked="" type="checkbox"/>
Reviewer(s)	<input checked="" type="checkbox"/>
Applicant Interviewer(s)	<input checked="" type="checkbox"/>
Attachments	<input checked="" type="checkbox"/>

Done

- Uncheck the box in the Visible on Requisition column for the fields and sections that you would like to hide.
- Click **DONE**.

The fields that were hidden will still display on the requisition template and are identified by a Field Hidden on Requisition icon  to the left of the field name to indicate that the field is hidden. You can still enter a value in a hidden field, but the value will not be visible to recruiters.

- Hiring Manager
- Reviewer(s)

Attachments Section

The entire Attachments section can be hidden. If the section is hidden, then it will not be visible on the General tab of the requisition.

Approvals Section

The entire Approvals section can be hidden. If the section is hidden, then it will not be visible on the General tab of the requisition.

However, this section will respect the preference in **Requisition and Applicant Preferences** to require at least one approver in order to save the requisition. If the Approvals section is hidden, but an approver is required, then the approver must be defined on the requisition template. Once the job requisition is submitted, the approval workflow will still need to be completed, even though the Approvals section did not appear on the job requisition.

Requisition Section

The following fields can be hidden in the Requisition section:

- Target Hire Date
- Do Not Allow to Apply

EEO Category Field

The **EEO Category** field can be hidden. However, the visibility is dependent upon the settings you configure in Compliance Enablement Preferences and is not available to hide in the Manage Field Visibility pop-up. See **Compliance Enablement Preferences** on page 425 for additional information.

Impact to Existing Requisitions

Existing requisitions are not impacted by this enhancement. If field visibility settings are changed on the requisition template that is being used by an existing requisition, the template's field visibility settings are not changed on the existing requisition.

This is also true for requisitions that are in a Draft status at the time of implementation of this enhancement.

EEO Category Exception

If the visibility of the **EEO Category** field is changed after a requisition is created, the new settings will be applied when a requisition is edited. For example, a requisition was created for a Location Organizational Unit (OU) where the **EEO Category** field was visible. If the preference for the Location OU is updated to make the field not visible for the location, then when the requisition is edited, the **EEO Category** field will no longer be visible and any previously entered values will be removed.

Note: *The **EEO Category** field always appears on the requisition template. However, the visibility of this field on the requisition depends on which OU is selected when creating the requisition, and whether the **Record EEO** preference is checked for that OU [Note: Compliance Enablement Preferences may be tied to Location, Division, or Position.]. If a requisition is created from a template that has an **EEO Category** value, but the Location [or other OU] does not have the **Record EEO** preference checked, then **EEO Category** will not appear on the requisition and no **EEO Category** value will be saved to the requisition.*

Impact to Standard and Custom Reports

Any fields that are not populated via the requisition template or requisition will be blank in reporting.

- Even if a field is hidden on the requisition, any populated values will still be accessible in reporting.
- If a user has permission to view requisition fields in reporting, they will be able to see values.

Field Level Access

If a field is configured as hidden on a template, it will not be visible on the requisition. If the field is visible on the requisition, existing Field Level Access settings will be applied.

Copy Requisition Template

When copying a template that has hidden fields, the hidden fields settings will be copied.

Create Requisitions

With this enhancement, **administrators can hide standard and custom fields on the General tab of the requisition template and default requisition template** so that they do not appear on the requisition. When fields are hidden, they cannot be viewed when creating requisitions.

To create job requisitions, go to **Recruit > Manage Requisition**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	<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: 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.</p>	Recruiting

This permission cannot be manually assigned.

Note: *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the **Requisition: Reviewer** permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the **Requisition: Reviewer** permission. See [Applicant Profile Page Overview](#) for more information about duplicate reviewer instances.*

Details Section

The following fields can be hidden in the Details section and will not appear if they were hidden:

- Additional Location(s)
- Grade
- Cost Center
- Contact Phone
- Range
- Referral Bonus
- Custom Fields

Even if a field is hidden from the requisition, the administrator may have filled in the field on the requisition template. The value in the field will not be visible when viewing the requisition.

EEO Category Field

The EEO Category field will only display on the requisition if the administrator has enabled the following in Compliance Enablement Preferences and the relevant OU is selected:

- The **Require OFCCP Compliance Enablement functionality** field is checked. Or,
- The **Record EEO** field is checked.

Description and Qualifications Section

The following fields can be hidden in the Description and Qualifications section and will not appear if they were hidden:

- Minimum Qualifications
- Ideal Qualifications
- Keywords

Even if a field is hidden from the requisition, the administrator could still have filled in the field on the requisition template. The value in the field will not be visible when viewing the requisition.

Hiring Team

The following fields can be hidden in the Hiring Team section and will not appear if they were hidden:

- Owner(s) - (**Note:** *For requisition requests, this field appears in the Requisition Owner(s) section.*)
- Hiring Manager
- Reviewer(s)

Even if a field is hidden from the requisition, the administrator could still have filled in the field on the requisition template. The value in the field will not be visible when viewing the requisition.

Attachments Section

The entire Attachments section can be hidden by the administrator when configuring the requisition template. If the section is hidden, then it will not be visible on the General tab of the requisition.

Even if the Attachments section is hidden from the requisition, the administrator could still have added attachments on the requisition template. In such cases, any attachments added by the administrator would not be visible on the requisition.

Approvals Section

The entire Approvals section can be hidden by the administrator when configuring the requisition template. If the section is hidden, then it will not be visible on the General tab of the requisition.

Even if the Approvals section is hidden, it may have been filled out by the administrator on the requisition template. In such cases, the requisition will be placed into a Pending Approval status and an approval workflow will need to be completed by the approvers once the requisition is submitted.

Note: *This section does not apply to requisition requests.*

Requisition Section

The following fields can be hidden in the Requisition section and will not appear if they were hidden:

- Do Not Allow to Apply - (**Note:** *This field does not apply to requisition requests.*)
- Target Hire Date

Note: *The Do Not Allow to Apply and Target Hire Date fields do not appear on requisition templates. However, they do appear in the **Manage Field Visibility pop-up** when*

configuring the requisition template, and the administrator can choose to hide them by checking the box on the pop-up.

Copying the Requisition

When copying a requisition, any fields that were hidden on the requisition template for the requisition will be hidden on the copied requisition.

Applicant Feed

Applicant Feed Overview

The new Applicant Feed page provides a single page view of an applicant's entire history of events and comments from the most recent 20 requisitions related to the applicant. This allows recruiters to only have to access one page in order to view this data.

Prior to this enhancement, the history and comments data could only be viewed on a per requisition basis. The data was also scattered across multiple pages of the Applicant Tracking System. Now, this information is available from a single page.

Note: *Recruiters will only have access to requisitions for which they have permission to view or for which they are the owner or hiring manager.*

Use Case

Peter the Recruiter is trying to fill a Sales Manager requisition but he is very busy and cannot spend time clicking every possible link and tab on the Applicant Profile in order to assess all the events that happened around each applicant. He needs a quick way to view all the comments and history items for an applicant across different requisitions from a single place. With the Applicant Feed, he can view this data on one page.

Implementation

This functionality is automatically enabled for all organizations using Recruiting.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Hiring Manager	Grants ability to view requisitions and applicants for jobs for which user is listed as a Hiring Manager. This permission cannot be constrained. Note: <i>This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as a hiring manager, the permission is revoked for the associated requisition. This permission cannot be manually assigned.</i>	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


<p>Requisition: Owner</p>	<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>	<p>Recruiting</p>
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<p>Requisition: Reviewer</p>	<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>	<p>Recruiting</p>
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Applicant Feed Page

The Applicant Feed page provides a single page view of an applicant's entire history of events and comments from the most recent 20 requisitions related to the applicant. This allows recruiters to only have to access one page in order to view this data.

Note: Recruiters will only have access to requisitions for which they have permission to view or for which they are the owner or hiring manager. The Applicant Feed page is not available for archived applicants.

To access the Applicant Feed, click the Applicant Feed icon  from the Manage Applicants, Applicant Profile, New Submissions, or Candidate Search Query page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. Note: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the Requisition: Manage permission overrule those of the Requisition: Owner permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. Note: This is a dynamically assigned permission that is not	Recruiting

available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.

Note: If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the **Requisition: Reviewer** permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the **Requisition: Reviewer** permission. See [Applicant Profile Page Overview](#) for more information about duplicate reviewer instances.

Applicant Feed - Ben Cho ×

Post Comments

Customer Service Represent... ▾
6 Selected ▾

Action From	Requisition	Type	Details	Date and Time
Tasha Shore	Customer Service Representative - West (req19)	Applicant Status Changed	From: In Review To: Phone Screening	1/26/2017 6:56:09 AM
Ben Cho	Customer Service Representative - West (req19)	Document Attached		12/31/2015 6:03:56 AM
Tasha Shore	Customer Service Representative - West (req19)	Applicant Status Changed	From: New Submission To: In Review	12/31/2015 6:03:56 AM
Tasha Shore	Customer Service Representative - West (req19)	Email Sent	Title: Applicant Added to Requisition	12/31/2015 5:59:00 AM
Tasha Shore	Customer Service Representative - West (req19)	Email Sent	Title: Applicant Added to Requisition	12/31/2015 5:59:00 AM
Tasha Shore	Customer Service Representative - West (req19)	Moved from Requisition	Moved from: Senior Accountant [9]	12/31/2015 5:57:55 AM
Tasha Shore	Customer Service Representative - West (req19)	Submission Received	Source: Added Manually	12/31/2015 5:57:55 AM
Ben Cho	Customer Service Representative - West (req19)	Document Attached	View Document	9/9/2014 11:22:31 AM

Close

Post Comments


Click **Post Comments** to post a comment about the applicant. This enables the Add Comment box to appear.

You can enter your comment in the Add Comment box. You can also select a specific requisition to which to post the comment by selecting it from the requisition drop-down. Or,

you can select an applicant's name so that the comment appears on all requisitions for that applicant.

Once you have finished your comment, click **POST**.

Once posted, the comment appears in the feed and displays the text of the comment in the Details box. The comment is also visible on the Applicant Profile > Comments tab.

You can delete comments you post on the applicant feed by clicking the Delete Comment icon  in the Details column.

Requisition Filter

This filter lists the most recent 20 requisitions for the applicant. You can click any of the requisitions in the filter to view the applicant's history and comments for that requisition. Requisitions display in order of most to least recent open requisitions, then they display from most to least recently closed.


You can also click All Requisitions in the filter to view the applicant's history for all of the requisitions that are available.

When accessing the page, the Applicant Feed opens to the requisition that the recruiter was viewing in Manage Applicants.

Event Type Filter

This filter lists the types of events that can be viewed on the Applicant Feed. By default, all event types are checked in the filter.

The following event types are available:

- **Attachments** - Attachments can be viewed by clicking the associated attachment icon in the Details column. The attachment will open in the application in which it was originally attached.
- **Comments** - The comment displays in the Details column for users with permission to manage or view comments. Options to edit or delete the comment also display for the user who posted the comment.
 - **Delete Comment** - You can delete a comment that you posted. Click the Delete Comment icon  to delete the comment. This removes the comment from all areas of the ATS.

- **Emails & Notifications** - For emails, the Type column displays "Email Sent," and the Details column displays the subject line. For notifications, the Type column displays the type of notification, such as "Interview Notification Sent to Applicant." The Details column displays the name of the notification, such as "Applicant Notification."
- **Offer Letter** - For offer letter events, the Type column displays the type of offer action, such as "Offer Sent to Candidate" or "Offer Accepted by Candidate." The Details column displays the version of the offer.
- **Other Events** -
- **Status Activity** - This event type is for status changes. The Type column displays "Applicant Status Changed," and the Details column indicates what the status was changed from and what it was changed to.


Actions Table

The following columns display in the table:

- **Action From** - This column displays the first and last name of the user who conducted the action.
- **Requisition** - This column displays the display job title of the requisition and the requisition ID.
- **Type** - This column displays the type of action.
- **Details** - This column displays the details for the action.
- **Date and Time** - This column displays the date and time on which the action occurred.

Comments do not display for archived applicants.

Applicant Profile Page

With this enhancement, an Applicant Feed icon  is added to the Applicant Profile page. Clicking the icon opens the Applicant Feed page, from which you can view an applicant's entire history of events and comments from the most recent 20 requisitions related to the applicant. This allows recruiters to only have to access one page in order to view this data.



Ben Cho


0 out of 2 selected

Batch Process
Options ▾





<p>Email bencho@acme.com</p> <p>Phone 555-555-5555</p> <p>Address 1601 Cloverfield Blvd. Ste. 600 Santa Monica, CA 90404 United States</p>	<p>Position Accountant</p> <p>Division Central</p> <p>Type Internal</p> <p>Language Preference English (US)</p>	<p>Applicant (User) Flags </p> <p>Talent Pools High Level Accounting Skills</p>
---	---	--

Candidate Search Query

With this enhancement, an Applicant Feed icon  is added to the Candidate Search Query page. Clicking the icon opens the Applicant Feed page, from which you can view an applicant's entire history of events and comments from the most recent 20 requisitions related to the applicant. This allows recruiters to only have to access one page in order to view this data.

Candidate Search Query

 The server is indexing all available records. Search results may be incomplete until indexing is finished.

 **New Search**

Select All


Actions ▾

Search




Resume/CV Fields ▾

account

First Name



Caroline Helsing

 Internal
  deadbox@cyberu.c...


Position: Product Line Manager Location: United States

Manager: Denise Phillips

User ID: chelsing


Last Activity: 10/2/2011

Release Notes as of October 2, 2017 (Build 17.3.3.12)


447

New Submissions





With this enhancement, a Feed column is added to the New Submissions page to provide quick access to the Applicant Feed page.


The column displays the Applicant Feed icon . Clicking the icon opens the Applicant Feed, from which you can view an applicant's entire history of events and comments from the most recent 20 requisitions related to the applicant. This allows recruiters to only have to access one page in order to view this data.









New Submissions: Senior Accountant (req9)
 Job Details


View New Submissions for Requisition: Senior Accountant (req9) 

New Submissions

Name Internal, External  All Sources  Select Applicant Flag   **Search**

Display 20  results per page

Name	Feed	Applicant Flags	Resume/CV	Type	Source	Ideal Matching Criteria (Edit)	Total
Landon Ferris				Internal	Added Manually	1 of 5  20% 	0 ou
Linda Flores				Internal	Added Manually	1 of 5  20% 	0 ou

 **Back**

Applicant Profile Enhancements

Applicant Profile Enhancements Overview

Additional enhancements to the Applicant Profile page are being made with this release to enable recruiters perform actions, such as adding applicants to requisitions and talent pools, through a simpler and more effective process from the applicant's profile.

The following enhancements are made to the Applicant Profile page:

- **Header Background** - You can now add a background to the header section, such as a logo or image. This can be done via Requisition and Applicant Preferences.
- **Add to Talent Pool** - You can now add applicants to talent pools directly from the Applicant Profile page.
- **View Talent Pool** - A **Talent Pools** field is added to the header to show you which talent pools an applicant is currently in. Each talent pool is a link that provides quick access to viewing and managing applicants in talent pools.
- **List of Additional Requisitions** - The additional requisitions to which an applicant has applied now display in a row below the header section.
- **Add to Requisition** - You can now add an applicant to another requisition via an option on the Summary tab.

Use Case

Peter the Recruiter is navigating through the Applicant Profile and needs to take certain actions for a specific applicant. He sees the potential of that applicant and needs an easy way to add him to other requisitions and/or talent pools. He also needs to be able to have a pleasant experience on the Applicant Profile page as he takes those actions.

Implementation

This functionality is automatically enabled for all organizations using Recruiting.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Hiring Manager	Grants ability to view requisitions and applicants for jobs for which user is listed as a Hiring Manager. This permission cannot be constrained. <i>Note: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as a hiring manager, the permission is revoked for the associated requisition. This permission cannot be manually assigned.</i>	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

Requisition and Applicant Preferences

With this enhancement, a new Applicant Profile Background Image section is added to Requisition and Applicant Preferences. This section enables administrators to select a background image that will display on the Applicant Profile page.

To access Requisition and Applicant Preferences, go to **ADMIN > TOOLS > RECRUIT**. Then, select **Requisition and Applicant Preferences** from the General Recruitment section.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition Preferences - Manage	Grants ability to access and manage Requisition Preferences. This permission cannot be constrained.	Recruiting Administration

Applicant Profile Background Image

Please select a background image for the Applicant Profile page. New images can be uploaded on the Corporate Preferences page. The recommended image size is 1000 by 200 pixels.

Desert.jpg

Applicant Profile Background Image

This section enables administrators to select a background image that will display on the Applicant Profile page. By default, the corporate color appears as the background on the Applicant Profile page.

To select an image:

1. Click the drop-down. This displays a list of the available images.
2. Select an image from the drop-down. The recommended image size is 1000 pixels by 200 pixels.
3. Click **SUBMIT** at the bottom of the page to submit the preference changes. This adds the image as the background on the Applicant Profile page.

Images that are larger than the size of the space on the Applicant Profile page will be truncated. Smaller images will be centered, and the remaining white space is filled in with the **corporate color**.

Note: The corporate color is defined by organizational unit (OU) in the **Primary Color** field in **Display Preferences**. The color may vary by OU.

Applicant Profile Page

With this release, the following enhancements are made to the Applicant Profile page:

- **Header Background** - You can now add a background to the header section, such as a logo or image. This can be done via Requisition and Applicant Preferences.
- **Add to Talent Pool** - You can now add applicants to talent pools directly from the Applicant Profile page.
- **View Talent Pool** - A **Talent Pools** field is added to the header to show you which talent pools an applicant is currently in. Each talent pool is a link that provides quick access to viewing and managing applicants in talent pools.
- **List of Additional Requisitions** - The additional requisitions to which an applicant has applied now display in a row below the header section.
- **Add to Requisition** - You can now add an applicant to another requisition via an option on the Summary tab.

Ben Cho

0 out of 2 selected

< ✓ > Batch Process Options

Email
bencho@acme.com

Phone
555-555-5555

Address
1601 Cloverfield Blvd.
Ste. 600
Santa Monica, CA 90404
United States

Position
Accountant

Division
Central

Type
Internal

Language Preference
English (US)

Applicant (User) Flags
[Flags]

Talent Pools
High Level Accounting Skills

Applied for 5 Job(s)

- Senior Accountant (r...)**
Status: Offer Letter
Applied: 2/14/2017
- Accountant (req7)**
Status: In Review
Applied: 6/6/2016
- CSR - West (req20)**
Status: Offer Letter
Applied: 12/31/2015
- Customer Service Re...**
Status: Phone Screening
Applied: 12/31/2015
- Senior Accountant (r...)**
Status: Offer Letter
Applied: 5/10/2014

Senior Accountant (req33)

Summary | Statuses | Application | Comments | Documents | History | Email

Applicant Summary

Current Status Offer Letter ⚠️ (1)

Resume/CV [Icon]

Application Source Added Manually [Icon]

Application Received Incomplete (✉️ Invite to Apply) ?

Communication ✉️ Send Email From Template ✉️ Send Customizable Email

Rating ★★★★★ (2 Ratings)

Application Flags [Icon] No Flags ?

Matching Criteria [Progress Bar] 20% 1 of 5 ⓘ ?

Add to Requisition Select Requisition

Header Background

A background image can now be added to the header on the Applicant Profile page. The header is added by the administrator in **Requisition and Applicant Preferences**.

If the administrator does not select an image in Requisition and Applicant Preferences, then the background is the **corporate color**.

Add to Talent Pool

An Add to Talent Pool option is added to the **OPTIONS** drop-down. This allows you to add an applicant to a talent pool directly from the Applicant Profile page.

To add an applicant to a talent pool:

1. Click **Add to Talent Pool** from the **OPTIONS** drop-down. This opens the Add to Talent Pool pop-up.

2. Select a talent pool from the **SELECT** drop-down.
3. Click **ADD**. This adds the applicant to the talent pool.

View Talent Pool

A **Talent Pools** field now displays in the header section, providing a list of the talent pools that the applicant is currently in. Click the linked name of the talent pool to **view the talent pool page in Manage Talent Pools**. From there, you can take actions based on your talent pool permissions.

Note: The talent pools that display are dependent upon the availability defined for the talent pool.

Ben Cho

0 out of 2 selected

Batch Process

Email
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Phone
555-555-5555

Position
Accountant

Division
Central

Applicant (User) Flags
High Level Accounting Skills

Talent Pools
High Level Accounting Skills

List of Additional Requisitions

For applicants who have applied to more than one requisition, the list of additional requisitions now appears below the header. Prior to this enhancement, the list appeared on the left side of the page.

You can arrow through the list to see all of the applicant's requisitions.

Ben Cho

0 out of 2 selected

Batch Process Options

Email
bencho@acme.com

Phone
555-555-5555

Address
1601 Cloverfield Blvd.
Ste. 600
Santa Monica, CA 90404
United States

Position
Accountant

Division
Central

Type
Internal

Language Preference
English (US)

Applicant (User) Flags
High Level Accounting Skills

Talent Pools
High Level Accounting Skills

Applied for 5 Job(s)

- Senior Accountant (r...)**
Status: Offer Letter
Applied: 2/14/2017
- Accountant (req7)**
Status: In Review
Applied: 6/6/2016
- CSR - West (req20)**
Status: Offer Letter
Applied: 12/31/2015
- Customer Service Re...**
Status: Phone Screening
Applied: 12/31/2015
- Senior Accountant (r...)**
Status: Offer Letter
Applied: 5/10/2014

Senior Accountant (req33)

Summary Statuses Application Comments Documents History Email

Add to Requisition

You can add applicants to requisitions for which they did not apply by using the Add to Requisition feature. The applicant appears on the new requisition as though they applied for the job themselves.

When an applicant is added, 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.

In addition, applicant documents and attachments on the Applicant Profile page for the source requisition move with the applicant to the new requisition. The documents and attachments display on the Documents tab of the Applicant Profile page for the new requisition. For all attachments in the Attachments table, the status in the Applicant Status column is New Submission.

Note: *Only candidates who checked the **Consider me for other positions** option when completing their application can be added to a requisition.*

To add an applicant to a requisition:

1. Click the **Select Requisition** link in the **Add to Requisition** field. This opens the Add to Requisition pop-up.

Add to Requisition x

Search and select the open requisition(s) you want to add the selected applicant(s) to. After selecting the desired requisition(s), indicate the new status for the applicant(s) in the target requisition.

Search Jobs

Open Jobs ▲


Add	Title	Division	Location	Owner
+	Account Manager	Central	New York	Susan Baum
+	Account Manager - California	West	California	Jessica Carter
+	Account Manager - California	West	California	Jessica Carter
+	Account Manager - California	West	California	Jessica Carter
+	Accountant	East	New York	Tasha Shore

2. Click the **SEARCH** button, which enables the Open Jobs table to appear and lists all available requisitions. Or, enter criteria in the filters, then click **SEARCH** to narrow the results.
3. The **Open Jobs** table lists the requisitions that match your search criteria. The title, division, location, and owner display, as well as a column to select the requisition. **Note:** *The results are dependent upon your permission constraints.*
4. Click the plus icon in the Add column to select the requisition. This enables the **Selected Jobs** table to appear and places the job in the table.

Selected Jobs Table


This table only displays once you have selected at least one requisition in the Open Jobs table. Jobs display in the table in the order in which they are added.

The following information displays in the table:

- **Remove** - You can delete jobs added to the Selected Requisitions table by clicking the Remove icon .
- **Title** - This column displays the job title for the requisition.
- **New Status** - 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:
 - A. Click the drop-down in the New Status column. All applicant statuses for the requisition display in the drop-down.
 - B. 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 are defined as required by the administrator when **configuring the job requisition template** and by the recruiter when **configuring the job requisition**.*
- **Send Email To** - Check the box to send an email to the requisition owner and/or the potential applicant, notifying them that the applicant has been added to the requisition. Both boxes are unchecked by default. **Note:** *If the requisition to which you are adding the applicant requires applicants to complete certain steps prior to submitting their application, the email can be configured by the administrator in Email Management to include a link for the applicant to apply directly to the requisition. Further, the application materials for the requisition will be pre-populated with the applicant's existing information.*

Add to Requisition

Selected Jobs ▲

Remove	Title	New Status	Send Email To:
	Account Manager	In Review ▼	<input checked="" type="checkbox"/> Potential Applicant(s) <input checked="" type="checkbox"/> Requisition Owner(s)

Internal Applicants
 Application data that does not match this requisition and cannot be moved: **Screening Questions, Upload Attachments, 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.

Done

Internal/External Applicants Section

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. 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 selected to be considered for other positions in order for application data to be moved.*

Custom Reports - Recruiting Fields

With this enhancement, new fields are added and modified for Recruiting Custom Reports and Multi-Module Reports.

To create Recruiting Custom Reports, go to **REPORTS > CUSTOM REPORTS**. Then, select Recruiting Report from the **NEW** drop-down.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Recruiting Report - Create	Grants ability to create and edit Custom Recruiting reports. This permission can be constrained by Division, Position, 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

Talent Pool Fields

A Talent Pools section is added to Recruiting Custom Reports to enable reporting on talent pool fields. The following fields are available in this section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Talent Pool Date Created	This field displays the date on which the talent pool was created.	Date
Talent Pool Name	This field displays the name of the talent pool.	Text
Talent Pool Owner	This field displays the owner of the talent pool. The value in the report output displays as Last Name, First Name.	Text

The report output displays a separate row for each talent pool per user, since users can be part of more than one talent pool.

Applications in Progress Field

The following field is added to the Applicant section for Recruiting Custom Reports and Multi-Module Custom Reports:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
------------	-------------------	------------

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Application Progress	<p>This field shows how much of the application has been completed.</p> <ul style="list-style-type: none"> ○ Applications that have been completed by the applicant and submitted show a value of 100%. ○ Applications where the recruiter has moved an applicant to a requisition have the potential to show values less than 100%. The percentage completion value will correspond to the weight of the application sections that have been completed for the target requisition Application Workflow. ○ Any applications that the applicant has only partially completed themselves will not appear in this report currently but is an enhancement that is planned for a future roadmap date. <p>This field is helpful to include in the report so that you know which applicants to follow up with on applications that have not yet been completed. Be sure to include the User Full Name and Requisition ID fields so that the report displays the applicant's name and the ID of the job requisition to which they applied.</p>	Numeric

Interview Guide Fields

The following fields are added to the Interview Management and Scheduling section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Scheduled Interview - Interviewer Comments	This field displays the comments provided by the interviewer. The name of the column in the report is Comment.	Text
Scheduled Interview - Interview Guide Name	This field displays the name of the interview guide.	Text
Scheduled Interview - Interview Guide Calculated Score	This field displays the average score calculated using the scores entered by the interviewer. The name of the column in the report is Average Competency Score.	Numeric
Scheduled Interview - Interview Guide Target Score to Advance	This field displays the suggested minimum average score a candidate should achieve for a particular interview guide in order to be considered for advancement. The name of the column in the report is Target to Apply.	Numeric
Scheduled Interview - Does Interview Guide Require	This field indicates whether an interview guide requires interviewers to enter numeric ratings for each competency in the interview guide. The value for the field is Yes or No.	Yes/No

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Ratings?	The name of the column in the report is Require Ratings.	

Job Postings Fields

New Field

The following field is added to the Requisition section for Recruiting Custom Reports and Multi-Module Custom Reports:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Posting - Expiration Date	<p>This field displays the expiration date for a given requisition's job posting. A column displays for each posting location that applies:</p> <ul style="list-style-type: none"> ○ Career Site ○ Career Center ○ Recruiting Agency ○ Smart Referral ○ Job Board <p>For requisitions with multiple posting types, a separate row appears for each posting type and corresponding expiration date.</p>	Date

Update to Existing Field

The following field in the Requisition section is updated with this enhancement:

OLD FIELD NAME	NEW FIELD NAME	NOTES
Requisition Posting - Job Board - Type	Requisition - Posting Type	<p>As part of this change, the values for the field in the report output are modified as follows:</p> <ul style="list-style-type: none"> ○ Career Site - Prior to this enhancement, the value was "Internal." ○ Job Board - Prior to this enhancement, the value was "External." ○ Career Center ○ Agency ○ Smart Referral <p>For requisitions with multiple posting types, a</p>

OLD FIELD NAME	NEW FIELD NAME	NOTES
		separate row appears for each posting type

Data Deletion to Support Data Privacy - Enhancements for Recruiting (Invite-Only Beta)

Application Deletion Functionality

With this enhancement, should your organization choose to enable the Data Deletion functionality, job applications for applicants who were not hired will be deleted when one of the following occurs:

- The period between the date on which the requisition is moved into a Closed status and the current date has exceeded the data retention period.
- The period between the date that the applicant was dispositioned and the current date has exceeded the data retention period.

This ensures, for compliance reasons, that applicant data is not retained unnecessarily.

Note: *This does not impact applicants who are hired and thus become users. Data deletion from these users can be handled via another deletion event. Child Location Organizational Units (OU) inherit the data retention settings of the parent OU.*

Data Load Wizard - Job Requisition Template

With the Active Fields by Requisition Template enhancement, administrators can now hide certain fields on the General tab when configuring requisition templates. The fields will still appear on the requisition template for administrators, but they will not appear for recruiters when creating a requisition using the template.

In order to support the Active Fields by Requisition Template enhancement, the visibility of the job requisition template fields is configured on the requisition template. In addition, the Job Requisition Template Data Load Template is enhanced to include the following additional information under the Helpful Hints tab. "NOTE: Visibility of these fields will be configured using the "Manage Field Visibility" pop-up on the requisition template. You must have relevant permission to manage Requisition Template page."

Implementation

This functionality is automatically enabled for all organizations using the Job Requisition Template data load.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition Template - Manage	Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration

FADV Background Check Integration Enhancements

FADV Background Check Integration Enhancements Overview

With this enhancement, additional requisition and candidate data will be passed to First Advantage (FADV) so that the data does not need to be entered manually in FADV by the administrator and applicant.

Implementation

This functionality is automatically enabled for portals that have an active background check integration with FADV. It is also necessary to have Succession and Form Management enabled.

The FADV background check integration must be enabled and activated through the Edge Marketplace. Portals must have already purchased FADV in order to enable it in Edge.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Initiate Background Check	This permission grants access to manage background checks from the Applicant Profile page. This applies to background checks that have been configured in the Integration Center. This permission cannot be constrained. Users who have this permission will have an Assign to Applicant link in the background check status type panel on the Applicant Profile page. Once the background check is assigned, the page will display "Assigned - [Date Assigned]."	Recruiting
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration
Applicants: View Background Check Status	Allow user to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained.	Recruiting
Applicants: View Background Check Status and Details Link	This permission allows users to view the background check status and view a link to access the background check report, which can be found in the background check status type panel on the Applicant Profile page. This permission cannot be constrained.	Recruiting
Application Workflow	Grants ability to access and view	Recruiting

Template - View	Application Workflow Templates.	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	<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</i></p>	Recruiting

information about duplicate reviewer instances.

Additional Background Check Fields

With this enhancement, the data for the following organizational unit (OU) fields will now be passed from Cornerstone to First Advantage (FADV):

- **Cost Center OU Name** - This is the Cost Center OU associated to the job requisition to which the candidate applied. In FADV this is an alphanumeric field with a character limit of 250.
- **Position OU Name** - This field maps to the **Display Job Title** field on the job requisition to which the applicant applied. In FADV this is an alphanumeric field with a character limit of 250.
- **Grade OU Name** - This field maps to the Grade OU associated on the job requisition to which the applicant applied. In FADV this is an alphanumeric field with a character limit of 250.

Map Education Fields for FADV

With this enhancement, an applicant's school type and degree type can now be mapped to First Advantage (FADV). In order for FADV to receive the applicant's data, the fields will need to be mapped in Succession > Resume > Education.

Note: When configuring the application workflow template for the requisition, the Upload Attachment action item will need to be included so that the applicant can enter their resume data when filling out the application.


Background Check Prerequisite

It is important to ensure that resume data exists in the system prior to submitting a background check request. Cornerstone will not send the data to FADV after a background check request has been placed.

Mapping Education Fields

The name of the field in Cornerstone (as defined in the **Field Name** field on the Add Field pop-up on the Resume > Education page) does not need to match the name of the field in FADV, but it must be mapped to the correct Applicant Mapping value noted in the table below

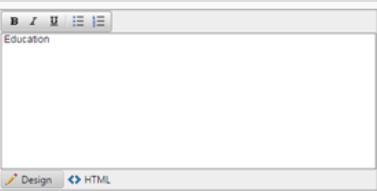
To map the fields:

1. Navigate to ADMIN > TOOLS > SUCCESSION MANAGEMENT > RESUME.
2. Select the Edit icon  in the Education row.
3. Ensure that **Education** is selected in the **Applicant Resume** drop-down.
4. Create the following fields and select the appropriate mapping option in the Applicant Mapping column:

FIELD NAME IN FADV	SELECT THIS OPTION IN DROP-DOWN IN APPLICANT MAPPING COLUMN	FIELD TYPE	DROP-DOWN OPTIONS TO ADD
School Type (Note: A field on the resume in Cornerstone must be mapped to this field in Accurate in order for Accurate to process the data.)	Grade	Dropdown	<ul style="list-style-type: none"> <input type="radio"/> other <input type="radio"/> highschool <input type="radio"/> community <input type="radio"/> college <input type="radio"/> technicalCollege <input type="radio"/> GED <input type="radio"/> postGraduate <p>Note: The options for the dropdown field are case sensitive and must be</p>

FIELD NAME IN FADV	SELECT THIS OPTION IN DROP-DOWN IN APPLICANT MAPPING COLUMN	FIELD TYPE	DROP-DOWN OPTIONS TO ADD
			<p><i>added in the exact spelling as above in order for the data to map successfully to FADV. For example, do not capitalize "other" and do not add a space between "high" and "school."</i></p>
Degree	Degree	Dropdown	<ul style="list-style-type: none"> ○ highschool ○ vocational ○ certification ○ associates ○ bachelors ○ masters ○ doctorate ○ postdoctorate ○ professional ○ GED ○ other <p>Note: <i>The options for the dropdown field type are case sensitive and must be added in the exact spelling as above in order for the data to map successfully to FADV. For example, do not capitalize "other" and do not add a space between "high" and "school."</i></p>























Title: Education

Directions:  Education

Applicant Resume: Education

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	APPLICANT MAPPING	APPLICANT POSITION	REQUIRED	ACTIVE	OPTIONS
0	Details	<input type="checkbox"/>	Scrolling Text Box	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
0	Degree in Progress	<input checked="" type="checkbox"/>	Checkbox	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
0	Highest Degree	<input checked="" type="checkbox"/>	Checkbox	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
0	University	<input type="checkbox"/>	Attribute	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
0	University	<input checked="" type="checkbox"/>	Short Text Box	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
1	Institution	<input checked="" type="checkbox"/>	Short Text Box	Institution	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
2	Graduation Date	<input checked="" type="checkbox"/>	Date Field	Graduation Date	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
3	Degree	<input checked="" type="checkbox"/>	Dropdown	Degree	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
4	Major	<input checked="" type="checkbox"/>	Short Text Box	Area of Study	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
5	Minor	<input checked="" type="checkbox"/>	Short Text Box	Minor	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
6	School Type	<input checked="" type="checkbox"/>	Dropdown	Grade	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 

Save Cancel

Question Bank - Reference Questions

With this enhancement, an applicant's reference type can now be mapped to First Advantage (FADV). In order for FADV to retrieve the applicant's data, a reference type question will need to be created in the Question Bank in Form Management so that the questions can be added to a form in Form Management that will be used to request the applicant's references.

The name of the question in Cornerstone does not need to match the name of the field in FADV, but it must be mapped to the correctly corresponding field in FADV in order for the data to pass successfully to FADV.

There are three different sets of these questions, since applicants can submit up to three references. Each set represents one applicant reference. It is necessary to create each set. If more than three sets are created, any data outside of the first three sets will not be passed to FADV.

Background Check Prerequisite

It is important to ensure that reference data exists in the system prior to submitting a background check request. Cornerstone will not send the data to FADV after a background check request has been placed.

Create Questions

To create the questions:

1. Navigate to **ADMIN > TOOLS > CORE FUNCTIONS > FORM MANAGEMENT > QUESTION BANK**.
2. Click **CREATE QUESTION**.
3. Select **Dropdown** as the field type.
4. Configure each question separately by entering a name for the question in the **Question** field and entering the API exactly as it is listed in the right-hand column.

Note about the FADV Telephone Field: *When applicants enter a telephone number, they must enter it in the following format, or FADV will not load the data: +(country code) XXXXXXXXXX OR +(country code) (XXX)XXX-XXXX].*

FIELD NAME IN FADV	FIELD TYPE	ENTER THIS API IN THE API NAME FIELD ON THE CREATE QUESTION PAGE
SET 1		
Given Name	Text	FADV_GivenName_1
Family Name	Text	FADV_FamilyName_1
Email Address	Text	FADV_Email_1
Telephone	Text	FADV_Phone_1
SET 2		

FIELD NAME IN FADV	FIELD TYPE	ENTER THIS API IN THE API NAME FIELD ON THE CREATE QUESTION PAGE
Given Name	Text	FADV_GivenName_2
Family Name	Text	FADV_FamilyName_2
Email Address	Text	FADV_Email_2
Telephone	Text	FADV_Phone_2
SET 3		
Given Name	Text	FADV_GivenName_3
Family Name	Text	FADV_FamilyName_3
Email Address	Text	FADV_Email_3
Telephone	Text	FADV_Phone_3

Create Form

Once you have created the questions, navigate to Form Management > **Manage Forms** and create a form for requesting an applicant's references, making sure to enter FADV_Reference_Form in the **API Name** field on the Build tab. The purpose of entering this API name is so that the system knows the correct form to send to FADV. *See Build Tab - Define General Information.*

On the form, add the questions that you created above. The references request form will be **assigned to applicants on the Manage Applicants page**. The form will be available to the applicant from their My Profile page in the career site, where they can then launch and complete the form.

IBM Assessment Integration

IBM Assessment Integration Overview

IBM Assessment is a third party assessment vendor that provides assessments for Recruiting.

Use Cases

Use Case 1: Activate the IBM integration through Edge

- James is Acme Company's administrator and has been tasked with enabling the integration between Cornerstone and IBM. This will allow Acme to include IBM assessments in their hiring workflow.
- James goes to the Edge Marketplace to purchase and activate the IBM Assessment integration.
- From the Edge Integrate page, James enters Acme's unique Client ID, Client Secret, Assess Account ID, and base URL, which are provided by their IBM project team.
- Acme's Cornerstone portal now has an active integration between Cornerstone and IBM.

Use Case 2: Recruiting Administrator configures IBM Assessment action step in Application Workflow

- Allan is the Recruiting administrator for Acme.
- With the integration enabled, Allan is tasked with including IBM assessments in all of Acme's Customer Support requisitions.
- Allan creates a new custom support application workflow template that includes an assessment action step, ensuring that IBM assessments is added as a custom integration.
- Allan creates a new Customer Support requisition to include the custom application workflow template that includes IBM assessments.
- Applicants applying to the Customer Support requisition are now prompted to complete an IBM assessment as part of their application process.

Use Case 3: Recruiter assigns an ad hoc assessment to an applicant

- Lisa, a hiring manager at Acme, is looking to add two new members to her Customer Support team. Before finalizing hiring decisions, she wants to make sure that the candidates are a good fit.
- Lisa goes to the Manage Applicants page for the Customer Support requisition and identifies four potential candidates to assign an assessment to, making sure that all candidates' statuses are assigned to "IBM assessment."
- While the same candidates are selected, Maria selects the **Assign Integration Assessment** option from the **Actions** drop-down. She proceeds to select the assessment to assign to the candidates and clicks **SUBMIT**.
- The applicants will receive an email with a link that will redirect them to complete the IBM assessment. **Note:** *The Assign Integration Assessment email trigger email will*

need to be successfully configured by the administrator in Email Administration in order for the applicant to receive the email.

- After the applicant completes the assessment, IBM sends Cornerstone a summary of the candidate’s results which are available for viewing on the Manage Applicants page or the Application tab on the Applicant Profile page.
- To further review the assessment results, Lisa clicks the **View Report** link, which will direct her to IBM to view a detailed report of the assessment results.

Implementation

This functionality is only available for organizations using Recruiting and must be purchased and activated via the Edge Integration Marketplace. It is necessary to have a contract and purchased assessments from IBM to implement the integration. As part of the Edge activation, and you will need to provide your company's pre-existing IBM unique identifiers.

IBM assessments are not supported on the Cornerstone mobile app. If the assessment is included in a step of the application workflow, the step will be skipped in the mobile app.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration
Applicants: Assign Assessment Integration	Grants access to manage assessment integrations from the Applicant Profile page. This applies to assessments that have been configured in the integration center. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration. This is the highest level of permission for this functionality. In addition to being able to assign assessments, users with this permission will be able to view the assessment status and assessment details.	Recruiting
Applicants: View Assessment Integration Status	Allows user to view the assessment integration check status on the Applications tab of the Applicant Profile page. The user cannot view the link to the detailed report of the assessment. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration. This is the lowest level of permission for this functionality.	Recruiting

	Users with this permission can only view the assessment status; they cannot assign assessments or view assessment details.	
Applicants: View Assessment Integration Status and Details Link	<p>Allows user to view the assessment integration status and view link to access the assessment report from the Applications tab of the Applicant Profile page and from the associated column on the Manage Applicants page. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration.</p> <p>This is the second highest level of permission for this functionality. Users with this permission will be able to view the assessment status and assessment details but will not be able to assign assessments.</p>	Recruiting
Application Workflow Template - Manage	Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.	Recruiting Administration
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
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	Recruiting

	OU, User's OU, and Grade.	
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<p>Requisition: Owner</p>	<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>	<p>Recruiting</p>
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<p>Requisition: Reviewer</p>	<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>	<p>Recruiting</p>
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IBM Integration Implementation Steps

To enable the IBM Assessment integration, the client administrator must perform the actions listed below. The activation of the integration is a one-time activity per environment (Stage, Pilot, Production).

1. Select and purchase the IBM Assessment integration via Edge Marketplace
 - Navigation: Admin > Tools > Edge > Marketplace
2. Activate the IBM Assessment integration on Edge Integrate
 - Navigation: Admin > Tools > Edge > Integrate
3. Configure the integration on the Edge Settings page
 - Client ID - This ID is used by IBM to authorize assessment request submissions from Cornerstone. The ID is provided by your IBM project team.
 - Client Secret - This value is used by IBM to authorize assessment request submissions from Cornerstone. The ID is provided by your IBM project team.
 - Upon saving of the page, the Client Secret value will be masked, i.e., the entered value will not appear in plain text.
 - Assess Account ID - This is the name of the client and provided by your IBM project team.
 - Base URL - This is the IBM endpoint for the API calls. This URL is provided by your IBM project team.

Additional Information

- You must have an existing contract with IBM.
- You must work with your IBM project team to purchase and configure their assessment packages.
- No migration is required.
- The activation of the integration is a one-time activity per environment.
- The integration cannot be purchased independently of a product line.
- There is no added cost to use the IBM Assessment integration.

Assign IBM Assessment

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Assign Integration Assessment	<p>This email is triggered when an Edge integration assessment is assigned to an applicant, such as a WOTC assessment. This email can be configured as a notification or a reminder, and it can be sent to External Applicant, Internal Applicant, OU Approver, Hiring Manager, OU Approver, or a specific user.</p> <p>Note: <i>The <code>APPLICANT.INTEGRATION.ASSESSMENT.LINK</code> tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.</i></p>	Recruiting

Ad Hoc Assignment

This set up is required when assigning to an applicant outside of an application workflow (i.e., ad hoc assignment).


Note: *The Assign Integration Assessment email trigger email will need to be successfully configured in order for the applicant to receive an email.*

- Navigate to the Manage Applicant Status page:
 - Navigation: **ADMIN > TOOLS > RECRUIT > APPLICANT STATUSES > SELECT THE TOP LEVEL OU**
- Click the **Create Custom Status** link. This opens the Create Custom Status pop-up.
- Complete the following fields in the pop-up:
 - Language** - If multiple languages are enabled for the portal, select the language from the drop-down list for which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop-down list and enter the localized name and description in the appropriate fields.
 - Display Name** - Enter the status name, which appears throughout the system. The character limit for this field is 50. When the display name of an active status is modified after the status is in use or has been used in a job requisition:
 - The new display name appears on the Default Status List page.
 - The new display name appears in the Status list on the job requisition template.
 - Any new job requisitions created after the display name is changed apply the new display name.
 - Job requisitions created before the status display name is changed continue to honor the name that existed at the time the requisition was created.
 - Description** - Enter the status description. This should describe the purpose of the status and what is implied when an applicant is in that status. The character limit for this field is 500.

- **Type** - Select **Custom Integration** from the drop-down. **Note:** *This field is displayed only when creating a custom status at the top level OU. When creating a custom status for a child OU, the **Type** field displays the type selected for the parent OU but is not editable.*
 - **Integration** - Select "IBM" from the drop-down.
 - **Active** - This field is checked by default. Ensure the field is checked before saving the status so that the status is active for the portal.
4. Click **SAVE** to save the custom applicant status.
 5. Create a new job requisition to include the new custom applicant status.

Assign in Application Workflow

This set up is required when assigning as a step within a job requisition's application workflow.

1. Navigate to the Application Workflow Templates page.
 - Navigation: ADMIN > TOOLS > RECRUIT > APPLICANT WORKFLOW TEMPLATES
2. Click the **Create Template** link. This action directs the administrator to the Create Template page.
3. Complete the fields on the Create Template page.
 - **Name** - Enter a descriptive name for the application workflow template. If multiple languages are enabled, select the language from the drop down list for which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop down list and enter the localized name and description in the appropriate fields.
 - **Description** - Enter a description for the application workflow template. This should describe the purpose of the workflow. The character limit for this field is 100.
 - **Add a Section** - Click on the Add Section icon . This opens the Add Section pop-up.
 - **Title** - Enter a descriptive value in the field, which has a character limit of 50.
 - Click on the **SAVE** button.
 - **Add Action Item** - Select **Custom Integration** from the **Add Action Item** drop-down. This opens the Edit Action Item pop-up. Complete the following fields in the pop-up:
 - **Title** - Enter a descriptive value in the **Title** field which is a required field. This character for this field is 50
 - **Instructions** - Enter instructions for the action item. This field is optional. It accepts HTML and does not have a character limit.
 - **Integration** - Select **IBM**.
 - **Completion Required** - Select this option to require applicants to complete the integration step before moving to the next step in the application workflow.
 - Click **SAVE** to save the action item.
4. Click **SAVE** to save the application workflow template.

5. Create a new job requisition to include the custom application workflow.

Applicant Experience - IBM Assessment

When an IBM assessments are included in the application workflow, applicants can complete the assessment when filling out the application. The assessment appears as a step in the workflow. The name of the step is dependent upon how the step is named when configuring the application workflow template associated with the requisition.

The applicant clicks **LAUNCH** on the application workflow step or the assessment URL from the email that was sent when the assessment was assigned via the Manage Applicants page. This will register the applicant with IBM and open the assessment that is associated with the job requisition.

The assessment opens in a new tab or browser. Upon the candidate completing the assessment, IBM processes the results and sends an update to Cornerstone.

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Assign Integration Assessment	<p>This email is triggered when an Edge integration assessment is assigned to an applicant, such as a WOTC assessment. This email can be configured as a notification or a reminder, and it can be sent to External Applicant, Internal Applicant, OU Approver, Hiring Manager, OU Approver, or a specific user.</p> <p>Note: The <i>APPLICANT.INTEGRATION.ASSESSMENT.LINK</i> tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.</p>	Recruiting

View IBM Assessment Results

A summary of the results are available in the following areas of the Applicant Tracking System (ATS):

- Manage Applicants page
- Applicant Profile > Application tab > IBM Assessment integration custom status panel

The following information displays:

- Status
- Score

Additional results can be viewed by clicking the **View Report** link.

Onboarding

Custom Reports - Onboarding Fields

With this enhancement, new fields are added to Onboarding Custom Reports and Multi-Module Custom Reports.

To create Onboarding Custom Reports, go to **REPORTS > CUSTOM REPORTS**. Then, select Onboarding Report from the **NEW** drop-down.

Permissions

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

Future OU Fields

The following fields are added to the Onboarding section to report on a user's future OUs:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Onboarding User Future [OU Name]	This field displays the name of the organizational unit (OU) in which the user will be placed on their hire date.	Text
Onboarding User Future [OU Name] OU ID	This field displays the ID of the OU in which the user will be placed on their hire date.	Text

Future Employee Relationship Fields

The following fields are added to the Onboarding section to report on a user's future employee relationships:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Onboarding User Future [Employee Relationship]	This field displays the name of the user who will be in the employee relationship for the new hire on	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Name]	their hire date.	
Onboarding User Future [Employee Relationship Name] Email	This field displays the email address of the user who will be in the employee relationship for the new hire on their hire date.	Text
Onboarding User Future [Employee Relationship Name] ID	This field displays the user ID of the user who will be in the employee relationship for the new hire on their hire date.	Text

Preboarding OU Fields

The following fields are added to the Onboarding section for preboarding OUs:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Onboarding User Preboarding [OU Name]	This field displays the name of the preboarding OU that the user was in prior to their hire date.	Text
Onboarding User Preboarding [OU Name] OU ID	This field displays the ID of the preboarding OU that the user was in prior to their hire date.	Text

Preboarding OU Configurations

Preboarding OU Configurations Overview

With this enhancement, preboarding organizational units (OU), previously called temporary OUs, are now configured separately from onboarding workflows. This helps to reduce the number of different onboarding workflows that needed to be created to account for variations in preboarding OUs. Onboarding administrators will have the ability to create different preboarding OU configurations that can be selected when starting onboarding for new employees.

Preboarding OUs are the OUs in which a new hire is placed until their hire date. Once a new hire reaches their hire date, they are placed into the OUs that are defined in the Organizational Units section of the Start Onboarding page.

Use Case

Rachel is on the talent management team at Acme. She is in charge of starting the onboarding process for new employees and making sure that they get the access they need for onboarding. As Rachel starts onboarding for each new employee, she also selects the Preboarding Organizational Units for the new hire so that they are placed into the proper Preboarding OUs prior to their first day of work.

Implementation

For the August '17 release, this functionality is automatically enabled for all Stage portals using Onboarding. The self-migration features enable administrators to configure this functionality in Production and Pilot portals.

Temporary OUs will be migrated from onboarding workflows and pre-populate preboarding OU configurations in the portal. Temporary OUs can also be self-migrated. **See [Self-Migration of Temporary OUs](#)** on page 502 *for additional information*.

Users and security roles that have the *Onboarding Workflows - Manage* permission will automatically get the *Preboarding OUs - Manage* permission.

Auto-Enablement

This functionality will be auto-enabled with the October '17 release in all portals that are using Onboarding. **See [Preboarding OU Configurations Auto-Upgrade with October '17 Release](#)** on page 504 *for additional information*.

Glossary

- **Preboarding OU** - An OU into which a Hired candidate is automatically placed during the onboarding process. Preboarding OUs are defined in preboarding OU configurations and/or on the Start Onboarding page. Once the Hired candidate completes onboarding and starts their position, they are automatically placed into the OUs that were configured in the Organizational Units section on the Start Onboarding page.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Preboarding Organizational Units - Manage	Grants ability to access and manage Preboarding OU Configurations. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Onboarding Workflows - Manage	Grants ability to access and manage Onboarding Workflows. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - 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
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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
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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</p>	Recruiting
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	<p><i>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>	
<p>Start Onboarding</p>	<p>Allows user to start 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.</p>	<p>Employee Onboarding</p>
<p>Users - View</p>	<p>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.</p>	<p>Core Administration</p>
<p>Users - View General Information</p>	<p>Grants ability to view the general fields on a user record, including first name, last name, username, assigned OUs, and custom relationships. This permission works in conjunction with the Universal Profile - User Record - View Users permission. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.</p>	<p>Core Administration</p>

Preboarding Organizational Unit Configurations

The Preboarding Organizational Unit Configurations page enables administrators to manage and configure preboarding organizational units (OU) for new hires. The page lists all of the preboarding OUs that have been created. From here, you can edit, copy, and delete the preboarding OUs.

To access the Preboarding Organizational Unit Configurations page, go to **ADMIN > TOOLS > ONBOARDING > PREBOARDING ORGANIZATIONAL UNIT CONFIGURATIONS**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Preboarding Organizational Units - Manage	Grants ability to access and manage Preboarding OU Configurations. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration

Create Configuration

Click the **CREATE CONFIGURATION** button at the top of the page to create a preboarding OU.

Preboarding OUs

All of the preboarding OUs that have been created display on the page. They are listed alphabetically.

The following information displays for each preboarding OU configuration:

- **Title** - The title of the configuration appears at the top.
- **Created By** - This field displays the first and last name of the user who created the configuration.
- **Description** - The description of the configuration displays below the created by user.
- **Options** - The following options are available from the options drop-down:

- **Edit** - Click **Edit** to edit the configuration. This opens the Edit Preboarding Organizational Unit page, from which you can make changes to the configuration. The changes are not applied to users who are currently onboarding; they only apply to future users.
- **Copy** - Click **Copy** to copy the configuration. All settings are copied and can be modified. The word "Copy" will appear in the title but can be removed.
- **Delete** - Click **Delete** to delete the configuration. This does not impact users who are currently onboarding.

Create Preboarding Organizational Unit Configuration

From the Create Preboarding Organizational Unit Configuration page, you can create preboarding organizational unit (OU) configurations that new hires will be placed into if they meet the availability criteria that are defined for the OU. These configurations will be available for recruiters to select on the Start Onboarding page when onboarding external users.

To access the Create Preboarding Organizational Unit Configuration page, click the **CREATE CONFIGURATION** button on the Preboarding Organizational Unit Configurations page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Preboarding Organizational Units - Manage	Grants ability to access and manage Preboarding OU Configurations. This permission cannot be constrained. This is an administrator permission.	Employee Onboarding - Administration

Create Preboarding Organizational Unit Configuration

Created By
Tasha Shore

* Required Field

General Information

Preboarding OUs

Availability

General Information

Preboarding OU Configuration Title *

Preboarding OU Configuration Description

Preboarding Organizational Units

Select the organizational units for this Preboarding configuration.

Division *	Position *
<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>
Grade	Cost Center
<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>
Location	Market
<input style="width: 95%; height: 25px;" type="text"/>	<input style="width: 95%; height: 25px;" type="text"/>

Allow edits to preboarding organizational units on the Start Onboarding page.

Availability *

Define the availability criteria that new hires must meet to be placed in these preboarding organizational units. The availability criteria is based on the organizational units that new hires will move into on their hire date.

Created By

The user who is creating the preboarding OU configuration displays at the top of the page.

Release Notes as of October 2, 2017 (Build 17.3.3.12)

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General Information


This section enables you to define the title and description. Required fields are identified with a red asterisk.

- **Preboarding OU Configuration Title** - Enter a title, up to 100 characters.
- **Preboarding OU Configuration Description** - Enter a description, up to 250 characters. The description should be worded in a way that helps recruiters know the purpose of this configuration. For example, if you create a configuration for newly hired sales managers, then the description could be something like "Use this preboarding OU configuration for all newly hired sales managers."

Preboarding Organizational Units

This section is where you will select the individual preboarding OUs for this configuration. Standard and custom OUs are available. Required fields are identified with a red asterisk.

To select the OUs:

1. Enter the OU name in the predictive search field, and then select the OU from the list of matching OUs.
2. Or, click the Select icon  to open the OU pop-up. Then, select the OU from the list.

If this preboarding OU configuration is selected by the recruiter on the Start Onboarding page for a new hire, then the new hire will be placed into the preboarding OUs until their hire date. Once the new hire reaches their hire date, they are automatically moved into the OUs that are defined in the Organizational Units section on the Start Onboarding page. **Note:** *It is possible that the preboarding OUs and the OUs that the applicant will move into on their hire date are the same OUs, depending on the preboarding OU configuration and the Start Onboarding page settings.*

Allow Edits to Preboarding OUs

The **Allow edits to preboarding organizational units on the Start Onboarding page** option enables you to enable or disable changes to the preboarding OUs. The option is checked by default.


When checked, recruiters are able to change the preboarding OUs on the Start Onboarding page.

Availability

This section enables you to select the availability criteria for the preboarding OU configuration. The availability determines the criteria that must be met in order for this preboarding OU configuration to be available for recruiters to select on the Start Onboarding page.

For example, you create a preboarding OU configuration called Accountant New Hires. The availability criterion in the **Position** field is the Accountant Position OU. When a recruiter configures the Start Onboarding page for a new hire in the Accountant position, the recruiter will be able to select your Accountant New Hires preboarding OU configuration because the candidate was hired for an Accountant position.

To select the availability:


1. Click the **SELECT OU CRITERIA** drop-down. This displays a list of the available OU types.
2. Select an OU type. This enables the predictive search field to display.
3. Enter the full name or partial name of an OU in the field, and then select an OU from the list of matching OUs.
4. Or, click the Select icon  to open the OU pop-up. Then, select the OU from the list.

Repeat these steps to add additional criteria.

Availability ^{*}

Define the availability criteria that new hires must meet to be placed in these preboarding organizational units. The availability criteria is based on the organizational units that new hires will move into on their hire date.

Position ▾



- Techwriter > **Accountant**
- Techwriter > **Accounting Manager**
- Techwriter > **Account Manager**
- Techwriter > Bookkeeping, **Accounting**, and Auditing Clerk/Assistant

Start Onboarding

With this enhancement, a Preboarding Organizational Units section now displays the bottom of the Start Onboarding page for external applicants. This section enables recruiters to select the preboarding organizational units (OU) in which the new hire will be placed until their hire date.

The Preboarding Organizational Units section does not appear for internal applicants.

To access the Start Onboarding page, click the **Start Onboarding** option in the **Options** drop-down on the Applicant Profile page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Start Onboarding	Allows user to start 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

Preboarding Organizational Units *

Select the preboarding organizational unit configuration for the user. The user will be placed in these preboarding organizational units when onboarding is started until the hire date.

Preboarding Organizational Units

The Preboarding Organizational Units section allows you to select the preboarding OU configuration that contains the OUs in which the user will be placed until their hire date. This section is a required to complete in order to start onboarding for the user.

To select the preboarding OU configuration:

1. Click the **SELECT PREBOARDING OU CONFIGURATION** button. This opens a slide-out menu on the left side of the page, which displays the configurations that are available to select, based on the OUs defined for the new hire on Start Onboarding page. These OUs are populated on the requisition and/or offer letter but can be changed on the Start Onboarding page.
2. Click the name of a configuration to select it. This closes the menu and adds the configuration to the page.

Upon clicking **START ONBOARDING** at the bottom of the page, the user is placed into the preboarding OUs.

Modify Preboarding OUs

If enabled by the administrator when creating the preboarding OU configuration, you can change any of the preboarding OU selections by selecting a different OU in the field.

Hire Date

Once the user reaches their hire date, the OUs that are defined in the Organizational Units section on the Start Onboarding page will overwrite the user's preboarding OUs.

Cancel Onboarding

When onboarding is canceled for the user, the user is removed from all preboarding OUs to which they were assigned.

Migration of Temporary OUs

Upon implementation of this enhancement, all past or current external users who are in the onboarding process will have their temporary OUs from the onboarding workflow populate the preboarding OUs.

Self-Migration of Temporary OUs

With this enhancement, top level system administrators can choose to self-migrate their portal over to use preboarding organizational units (OU) rather than temporary OUs. The temporary OUs are found in onboarding workflows that were created prior to implementation of this enhancement.

In order to enable top level system administrators to self-migrate their portal, this enhancement has added a Preboarding Organizational Units Enablement section is added to the bottom of the Onboarding Workflows administration page. Enabling the migration is portal-wide.

Note: *The self-migration will not include inactive onboarding workflows.*

Enable Self-Migration

To self-migrate the portal:

1. Navigate to **ADMIN > TOOLS > ONBOARDING > ONBOARDING WORKFLOWS**.
2. Scroll down to the Preboarding Organizational Units Enablement section.
3. Click the **ACCEPT & ENABLE** option. This opens the Preboarding Organizational Units Enablement acknowledgment pop-up.
4. Click **YES** to enable the migration.
5. Click **NO** to close the pop-up without enabling the migration.

Clicking **YES** removes the temporary OUs from onboarding workflows. You will then need to select the preboarding OUs for new hires by creating preboarding OU configurations and/or selecting the preboarding OUs on the Start Onboarding page.

The Preboarding Organizational Units Enablement section on the Onboarding Workflows page will be hidden the next time you or another system administrator accesses the page.

Self-Migration Enabled

Once the self-migration is enabled, all temporary OUs in onboarding workflows are converted to preboarding OU configurations. The preboarding OU configurations can be viewed and managed from the **Preboarding OU Configurations** page.

- For each onboarding workflow, one new preboarding OU configuration is created. The following values are placed into the configuration:
 - **Created By** - The name of the user who enabled the self-migration.
 - **Title of Preboarding OU Configuration** - The name of the onboarding workflow.
 - **Preboarding OUs** - Populated with the temporary OUs from the onboarding workflow.
 - **Availability** - Populated with the availability settings from the onboarding workflow.

Onboarding Information Section

The self-migration will make changes to the Onboarding Information section for onboarding workflows. After migration, only the following options will display in this section:

- **New Employee** - Prior to migration, this option was named "External-to-internal" and allowed administrators to select temporary OUs for external candidates who were hired from outside the organization and are being onboarded to an internal position. After migration, selecting this option will create an onboarding workflow for external-to-internal onboarding.
- **Current Employee** - Prior to migration, this option was named "Internal-to-internal" and allowed administrators to select temporary OUs for users who were onboarding from one internal position to another. After migration, selecting this option will create an onboarding workflow for internal-to-internal onboarding.

The temporary OUs fields will no longer display, since they will be configured on the **Create Preboarding Organizational Unit Configuration** page.

Automatic Permission Assignment

In addition, all users who currently have permission to manage onboarding workflows will be automatically assigned the *Preboarding Organizational Units - Manage* permission.

Preboarding OU Configurations Auto-Upgrade with October '17 Release

Preboarding OU Configurations will be auto-upgraded with the October '17 Release. After the auto-upgrade, the Preboarding Organizational Units Enablement section will not be visible on the Onboarding Workflows page.

The Preboarding OU Configurations enhancement is part of the August '17 release. See **Preboarding OU Configurations Overview** on page 490 *for additional information*.

Start Onboarding Enhancements

With this enhancement, administrators can now limit the onboarding process to only applicants who are in a Hired status. In addition, the original hire date on the user record will reflect the hire date value on the Start Onboarding page.

Limit Onboarding to Hired Applicants

To accommodate this enhancement, a **Limit Start Onboarding to Hired Status** option is added to the Applicant Preferences section in Requisition and Applicant Preferences. This option is unchecked by default. When checked, the Start Onboarding option only appears in the Options drop-down on the Applicant Profile page if the applicant is in a Hired status. Onboarding will not be able to be started for applicants in any other status.

Applicant Preferences	
Restrict Edit Internal Applicant Details:	<input type="checkbox"/> (Internal applicant contact details cannot be edited on both the Applicant Profile and Career site My Profile. If this setting is enabled, the Phone Required setting is ignored for internal applicants.)
Skip New Submission Status:	<input type="checkbox"/> (New applicants automatically proceed to the first configured status, i.e. "In Review")
Phone Required:	<input checked="" type="checkbox"/> (Phone number is required when creating Applicant Profile and when Uploading Resume.)
Limit Start Onboarding to Hired Status:	<input type="checkbox"/> (The option to Start Onboarding for an Applicant on the Applicant Profile is only accessible when the Applicant has been placed into Hired status.)

User Record - Original Hire Date

With this enhancement, the value in the **Original Hire Date** field on the **User Record** page will be the value in the **Hire Date** field on the **Start Onboarding** page for external new hires.

If the **Hire Date** field is changed on the Edit Onboarding page, then the value on the user record is also changed.

If onboarding is canceled, then the value in the **Original Hire Date** field is removed.

Implementation

This functionality is automatically enabled for all organizations using Onboarding.

Security

The following existing permission applies to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Start Onboarding	Allows user to start 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
Users - View	Grants ability to search for and view summary information about users in the portal via the Admin/Users screen. This permission	Core Administration

	<p>can be constrained by OU, User's OU, User Self and Subordinates, and Users. This is an administrator permission.</p>	
<p>Users - View General Information</p>	<p>Grants ability to view the general fields on a user record, including first name, last name, username, assigned OUs, and custom relationships. This permission works in conjunction with the Universal Profile - User Record - View Users permission. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.</p>	<p>Core Administration</p>

Password Preferences for Candidate Profile Creation

With this enhancement, the password rules that are configured at the top level Division Organizational Unit (OU) are respected and displayed to applicants when they create an account on the career site. This ensures that applicants meet the minimum password requirements that are defined for users in your organization.

Prior to this enhancement, the password rules for creating an account on a career site were hard-coded and included a length requirement of 4-15 characters. The requirement was not connected to the corporate password settings.

Note: *The password reset options in Password Preferences do not apply to this enhancement.*

General
Password Reset Options

Passwords must contain both upper and lower case letters
 Allow user to change password
 Send email notification upon password change
 Require confidential password reset and send email notification to user
 Passwords must contain alpha and numeric characters
 Passwords cannot have three or more consecutive same characters
 Passwords must contain at least one special character

Passwords expire every days (leave blank if passwords do not expire)

Passwords cannot be the same as any previous passwords (leave blank if passwords cannot be used more than once)

Minimum password length: characters (must be at least 4 characters)

Maximum password length: characters (cannot exceed 20 characters)

Forgot password message. (Will be displayed to users on forget password page)

Please enter your User Name or User ID, and an email containing your password will be sent to you.

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. ?

Implementation

This functionality is automatically enabled for all organizations using Recruiting.

Path

To manage Password Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > PASSWORDS.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Password Preferences - Manage	Grants ability to manage Password Preferences, which includes specifying the settings for users to change their own password, or for the system to generate an anonymous password, set the specific password requirements and allowing users to reset password by answering security questions. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

Quest Diagnostics Drug Screening Integration

Quest Diagnostics Drug Screening Integration Overview

Quest Diagnostics (Quest) is a third party vendor that provides drug screenings for Recruiting.

Use Cases

Use Case 1: Activate the Quest integration through Edge

- James is Acme Company's administrator and has been tasked with enabling the integration between Cornerstone and Quest. This will allow Acme to include Quest drug screenings in their hiring workflow.
- James goes to the Edge Marketplace to purchase and activate the Quest integration.
- From the Edge Integrate page, James enters Acme's unique API credentials, Company/Organization Name, Endpoint URL, Account Name and ID, and Drug Test Name and ID, which are provided by their Quest project team.
- Acme's Cornerstone portal now has an active integration between Cornerstone and Quest.

Use Case 2: Recruiting Administrator creates a custom applicant status

- Lisa is the Recruiting administrator for Acme.
- Holly, a hiring manager at Acme, is looking to add a new member to her Marketing team.
- With the integration enabled, Lisa is tasked with adding a drug screening status in all of Acme's marketing job requisitions.
- Lisa creates a new custom applicant status that is set to a custom integration type Quest Diagnostics.
- Lisa creates a new job requisition that includes that new custom applicant status.
- Lisa has now configured the Marketing job requisitions to include the Quest Diagnostics custom status.

Use Case 3: Recruiter assigns background check request for an applicant

- Ashley, a recruiter at Acme, has identified Paul James to be a stellar applicant.
- To ensure a sound hiring decision is made and to protect Acme from potential risks, Ashley assigns a drug screening test on Paul by moving his status to Quest.
- Ashley selects the appropriate drug test name, then submits the request.
- Paul receives an email from Quest and clicks the link to complete the screening application request in Quest.

Use Case 4: Recruiter views drug screening results and its detailed report in Quest via a link

- Ashley is eager to find out the results of Paul's drug screening status.
- Ashley navigates to Paul's Applicant Profile > Statuses page and sees the status on the request.

- To view additional details of the background request, Ashley clicks the **View Progress** link, which directs Ashley to the Quest site.

Implementation

This functionality is only available for organizations using Recruiting and must be purchased and activated via the Edge Integration Marketplace. It is necessary to have a contract and purchased assessments from Quest to implement the integration.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Initiate Background Check	This permission grants access to manage background checks from the Applicant Profile page. This applies to background checks that have been configured in the Integration Center. This permission cannot be constrained. Users who have this permission will have an Assign to Applicant link in the background check status type panel on the Applicant Profile page. Once the background check is assigned, the page will display "Assigned - [Date Assigned]."	Recruiting
Applicants: View Background Check Status	Allow user to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained.	Recruiting
Applicants: View Background Check Status and Details Link	This permission allows users to view the background check status and view a link to access the background check report, which can be found in the background check status type panel on the Applicant Profile page. This permission cannot be constrained.	Recruiting
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.	Recruiting 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

<p>Requisition: Manage</p>	<p>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.</p>	<p>Recruiting</p>
<p>Requisition: Owner</p>	<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>	<p>Recruiting</p>
<p>Requisition: Reviewer</p>	<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>	<p>Recruiting</p>

Quest Integration Implementation Steps

To enable the Quest Diagnostics (Quest) drug screening integration, the administrator must configure the items below on the Edge Settings page.

Before you begin, Quest Diagnostics will need to set up/configure their systems to enable this integration. Contact your Quest Diagnostics Drug Screen Account Manager or Sales Representative for more information. If you do not have one assigned, email the Quest Diagnostics Implementation Team at dgxesaccountimplementation@questdiagnostics.com. Due to certain Quest Diagnostics account setups that may already be in place, this integration may not be suitable for all employers.

The activation of the integration is a one-time activity per environment (Stage, Pilot, Production).

To enable the integration:

- **API Username and Password** - These credentials authorize Cornerstone to connect to Quest's API. These credentials are provided by your Quest project team.
 - The API password is a masked field, i.e. the entered password will not appear in plain text.
- **Company/Organization Name** - This is your unique identifier that enables Quest to authorize background check submissions from Cornerstone. This code is provided by your Quest project team.
- **Endpoint URL** - This is the Quest endpoint for the API calls. This URL is provided by your Quest project team.
- **Account Name and Account ID** - These are your available account names and corresponding IDs, which are provided by your Quest project team.
- **Drug Test Name and ID** - These are provided by your Quest project team. The drug tests entered here will be available to recruiters when assigning a drug screening test to an applicant.

Please fill in the fields below to configure your integration.

i Setup Instructions

API Username: _____

API Password: _____

Company/Organization Name: _____

Endpoint URL: _____

Available Accounts

Account Name	Account ID	Remove
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	✖

+ Add New Available Accounts

Available Drug Tests

Drug Test Name	Drug Test ID	Remove
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	✖

+ Add New Available Drug Test

Additional Information

- You must have an existing contract with Quest.
- You must work with your Quest project team to purchase and configure their screening packages.
- No migration is required.
- The activation of the integration is a one-time activity per environment (Stage, Pilot, Production).
- The integration cannot be purchased independently of a product line.
- The cost will be displayed on Edge when you purchase the integration.

Assign/View Quest Drug Screening

To assign the Quest Diagnostics drug screening and view the results:

1. Navigate to the Manage Applicant Status page:
 - Navigation: ADMIN > TOOLS > RECRUIT > APPLICANT STATUSES > SELECT THE TOP LEVEL OU
2. Click the **Create Custom Status** link. This opens the Create Custom Status pop-up.
3. Complete the following fields in the pop-up:
 - **Language** - If multiple languages are enabled for the portal, select the language from the drop-down list for which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop-down list and enter the localized name and description in the appropriate fields.
 - **Display Name** - Enter the status name, which appears throughout the system. The character limit for this field is 50. When the display name of an active status is modified after the status is in use or has been used in a job requisition:
 - The new display name appears on the Default Status List page.
 - The new display name appears in the Status list on the job requisition template.
 - Any new job requisitions created after the display name is changed apply the new display name.
 - Job requisitions created before the status display name is changed continue to honor the name that existed at the time the requisition was created.
 - **Description** - Enter the status description. This should describe the purpose of the status and what is implied when an applicant is in that status. The character limit for this field is 500.
 - **Type** - Select **Custom Integration** from the drop-down. **Note:** *This field is displayed only when creating a custom status at the top level OU. When creating a custom status for a child OU, the **Type** field displays the type selected for the parent OU but is not editable.*
 - **Integration** - Select "Quest Diagnostics" from the drop-down.
 - **Active** - This field is checked by default. Ensure the field is checked before saving the status so that the status is active for the portal.
4. Click **SAVE** to save the custom applicant status.
5. Add the custom applicant status to a job requisition.
6. Navigate to the Applicant Profile > Statuses tab.
7. Click the **Assign to Applicant** link in the Quest status type section. This opens a pop-up.
8. Complete the following required fields in the pop-up:
 - **Select Provider** - Select the background check provider. The options that are available are active integrations that have been enabled in Edge.
 - **Select Account Name** - Select the account name that the administrator has entered on the Edge Client Settings page.

- **Select Drug Test Name** - Select the drug test name that the administrator has entered on the Edge Client Settings page.
9. Click **SUBMIT**.
 10. Quest will send an order acknowledgment response.
 11. The Quest status type section on the Statuses tab will indicate the following information:
 - **Assigned** - This field displays the date on which the drug screen test was assigned to the applicant.
 - **Reference ID** - This field displays the User ID value.
 - **Status** - This field displays the overall status of the order. The status "In Progress" displays upon receipt of a successful drug test order. The status is updated automatically when status changes are made by Quest.
 - **Drug Test Name** - This field displays the name of the drug test name assigned to the applicant.
 - **Provider Reference ID** - This field displays the ProviderReferenceId received from Quest.
 - **Result** - This field displays the results received from Quest.
 - **View Details** - Click the **View Details** link to view the results in Quest. It is not necessary to enter additional credential in order to access Quest and view the results.
 12. You can also view the results on the Manage Applicants page.

Custom Recruiting Report

Quest Diagnostics (Quest) drug screenings can be reported on in Custom Recruiting Reports. The following fields provide Quest data:

- Assigned Date
- Completed Date
- External Vendor Name
- External Vendor Package Result
- External Vendor Package Title
- External Vendor Product

Requisition Enhancements

Requisition Enhancements Overview

With this release, the following requisition enhancements are made for requisition templates, requisitions, and requisition requests:

- **Order of Internal and External Tabs** - The order of the Internal and External tabs in the Description and Qualifications section is reversed to match the order of the tabs on the Job Ad page.
- **Clone External Description** - When you are on the Internal tab in the Description and Qualifications section, you can now clone the external description.
- **Required Field Indicator** - Fields that are required on requisitions will now be identified with a red asterisk to the right of the field name.
- **View Description and Qualifications and Job Ad in Full Screen** - A toggle option is added that enables you to view these sections in full screen.

Implementation

This functionality is automatically enabled for all organizations using Recruiting.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Default Requisition Template - Manage	Grants access to manage Default Requisition Template Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled,	Recruiting

	<p>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>	
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Requisition: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	Recruiting
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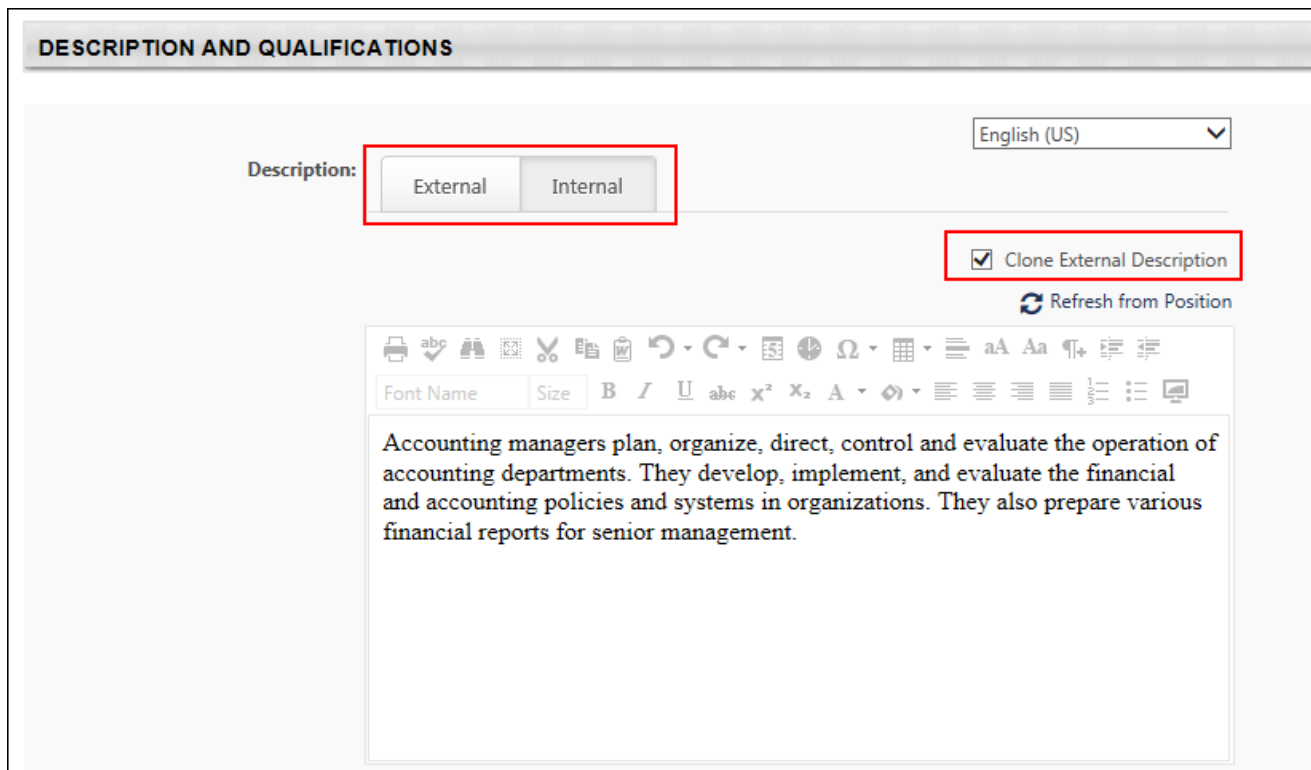
Requisition Template - Manage	Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
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Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration
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Clone External Description

The following enhancements are made to the Description and Qualifications section for requisition templates, requisitions, and requisition requests:

- **Clone External Description** - A **Clone External Description** option has been added. The box is checked by default, when creating a new requisition, requisition template, or requisition request. Checking the box clones the external description from the External tab. **Important Note:** *If you clone the external description after entering an internal description, the internal description text will not be recoverable.*
- **Order of Internal and External Tabs** - The order of the Internal and External tabs is reversed to match the order of the tabs on the Job Ad page. As a result, the External tab is visible by default. Prior to this enhancement, the Internal tab appeared on the left and External tab appeared on the right.



DESCRIPTION AND QUALIFICATIONS

English (US) ▼

Description: External Internal

Clone External Description

Refresh from Position


Accounting managers plan, organize, direct, control and evaluate the operation of accounting departments. They develop, implement, and evaluate the financial and accounting policies and systems in organizations. They also prepare various financial reports for senior management.

Required Field Indicator

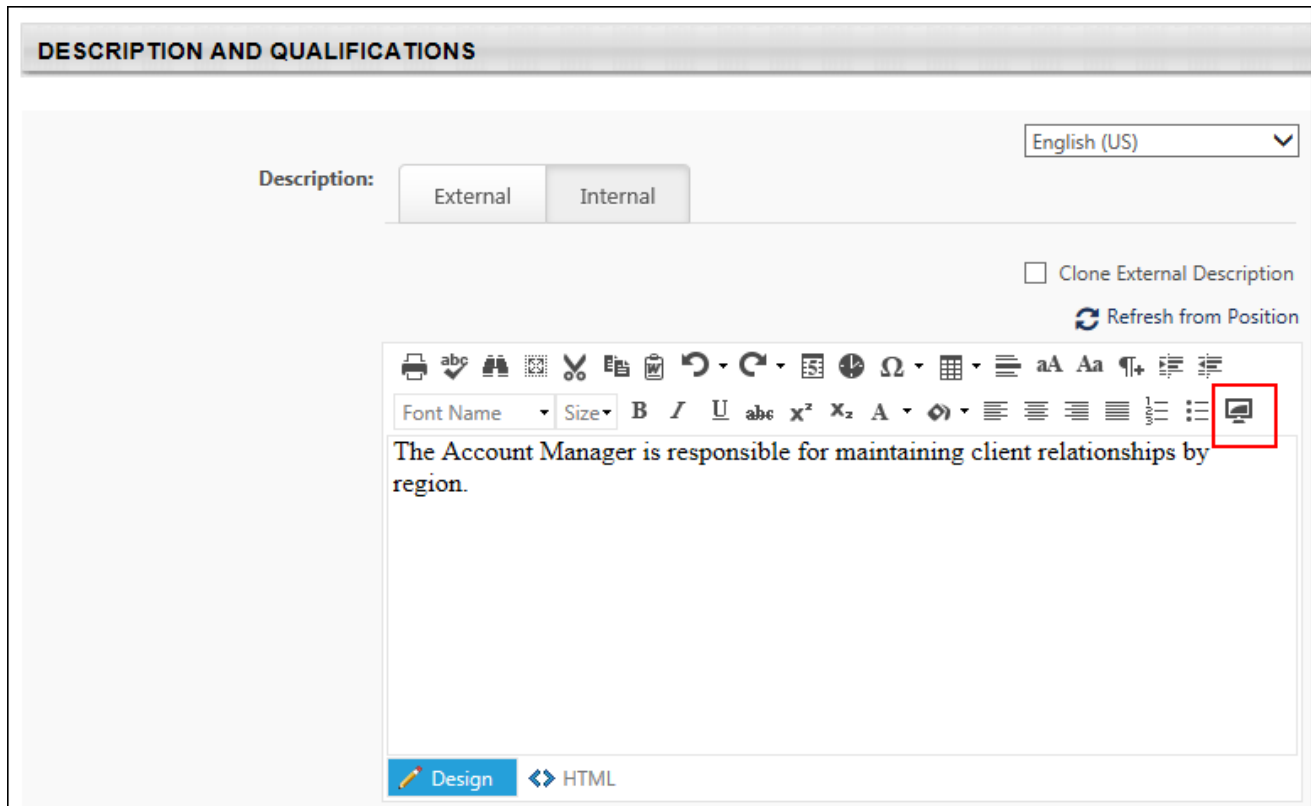
With this enhancement, fields that are required on requisitions will now be identified with a red asterisk to the right of the field name.

General	Job Ad	Application Workflow
Job Title *	<input type="text" value="Accountant"/>	<input type="button" value="Copy"/>
Requisition Template *	<input type="text" value="Senior Accountant"/>	<input type="button" value="Copy"/>
View In	<input type="text" value="English (US)"/>	Default Localized Languages
DETAILS		
<p>Each requisition must have a valid Requisition Facility Location Address in order to be searchable with geolocation on the Career Site. Add make the requisition searchable in multiple locations. Internal Recruiting users will have access to this requisition if one or more of the req constraints, if any, on the user's permission. For multi-location requisitions, if only one location is displayed anywhere in Cornerstone, such Primary Location. Compliance questions presented to applicants are based on the Primary Location, and any other location-based prefer</p>		
Display Job Title *	<input type="text" value="Senior Accountant"/>	
Division *	<input type="text" value="Central"/>	<input type="button" value="X"/>
Primary Location *	<input type="text" value="Chicago"/>	<input type="button" value="X"/>
	Address *	IL USA <input type="button" value="Edit"/>

View Text Sections in Full Screen

A Toggle Full Screen Mode option is added to the Description and Qualifications sections and to the Job Ad page. Click the icon  to view each section in full screen mode. Click the icon again to return to the default view.

When viewing in full screen, you must be in the Design mode in order to exit the full screen view.





DESCRIPTION AND QUALIFICATIONS

English (US) ▼



Description: External Internal

Clone External Description

 Refresh from Position

Font Name Size **B** *I* U abc x² x₂ A ▼ 

The Account Manager is responsible for maintaining client relationships by region.

 Design  HTML

Requisition Request Enhancements

Requisition Request UI Redesign Overview

With this enhancement, the pages for configuring and managing requisition requests are redesigned to improve the look, feel, and functionality of the process. All pages for configuring requisition requests now appear as top-row tabs. Prior to this enhancement, the pages for configuring requisition requests appeared as a list of tabs on the left-side of the page.

In addition, the user interface (UI) design for the Requisition Request pages for submitters and reviewers is updated to match the current look and feel of the system.

Implementation

This functionality is automatically enabled for all organizations using Recruiting.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	<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: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	Recruiting
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Requisition Requests

With this enhancement, the following changes are made to the Requisition Requests page for submitters:

- The user interface (UI) is updated to match current styles.
- The UI for the Comments and Retract Requisition Request pop-ups are updated to match current styles.

There are no functionality changes to this page or the pop-ups.

To access the Requisition Requests page, go to **Recruit > Requisition Requests**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	Recruiting

Requisition Requests

[+ Create New Request](#)

Job Title	Request Reviewers	Submitted	Status	Requisition ID	Options
Business Development Advisor	Tasha Shore, Chase Ross, Jessica Carter, Jessica Carter	7/21/2016 2:16 PM	Declined		
Auditor	Tasha Shore, Chase Ross, Jessica Carter, Jessica Carter	7/21/2016 2:14 PM	Declined		

(2 Results)

Create Requisition Request

With this enhancement, the layout and user interface (UI) of the Create Requisition Request pages is updated to match current styles. The General tab and Job Ad tabs now appear as top-row tabs. Previously, they appeared as links on the left side of the page.

To create requisition requests, go to **Recruit > Requisition Requests**, then click the **Create New Request** link from the Requisition Requests page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Submit Request	Grants ability to create requisition requests. This permission can be constrained by OU and User's OU.	Recruiting

Create Requisition Request

General
Job Ad

*Each requisition must have a valid Requisition Facility Location Address to be searchable with geolocation. Geolocation is powered by Google. Additional location(s) can be added in order to make the requisition searchable in many locations on the Career Site. When location constraints are considered when determining whether internal Recruiting users should have access to the requisition, the requisition will be available if one or more of the requisition locations falls within the user's constraints.

Job Title	Position <input type="text"/>
Requisition Template	Please Select <input type="text"/>
Display Job Title	<input type="text"/>
Division	Division <input type="text"/>
Location	Location <input type="text"/>
Address	No Address <input type="checkbox"/>
Grade	Grade <input type="text"/>
Contact Phone	<input type="text"/>
Employment Type	Please Select <input type="text"/> <input type="radio"/> Full Time <input type="radio"/> Part Time
Currency	Please Select <input type="text"/>
Compensation	Please Select <input type="text"/>
Range	<input type="text"/> To <input type="text"/>
Referral Bonus	<input type="text"/>

Requisition Requests Page for Reviewers

With this enhancement, the following changes are made to the Requisition Request page for reviewers:

- The user interface (UI) is updated to match current styles.
- The page name has been changed from Requisition Requests to Submitted Requisition Requests.

There are no functionality changes to these pages.



To review requisition requests, click the **Requisition Requests** link in the Options column of the Requisition Requests page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	<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

Submitted Requisition Requests

Job Title Pending

Job Title	Requested By	Submitted	Status	Requisition ID	Options
*GMPosition	Jordan Sugar	5/26/2017 9:23 AM	Pending		
[DP] Mayor	Jordan Sugar	3/31/2017 10:05 AM	Pending		

(2 Results)

SmashFly Integration

SmashFly Integration Overview

SmashFly is a Recruitment Marketing and Candidate Relationship Management (CRM) solution. SmashFly helps you find, initiate and nurture candidate relationships so you both can better determine fit before hire to reduce costs, improve engagement, and increase retention.

With the SmashFly integration, jobs created in the Applicant Tracking System (ATS) will be sent seamlessly into SmashFly so that you can market these jobs across the web. With SmashFly, you can capture job seeker details in the CRM via opt-in forms before they apply to a job. You may then use SmashFly to conduct email marketing campaigns targeting these candidates in the CRM. Finally, with the SmashFly Cornerstone integration, you can view metrics on your recruitment marketing campaigns to see how a job seeker has progressed from a passive job seeker into an applicant in the ATS, and then into a hire.

Use Cases

Scenario A:

Acme Co's Talent Acquisition team uses both Cornerstone and SmashFly as part of their recruiting tech stack. Amy, a Recruiter at Acme, wants to market a job in SmashFly that she has just created in the Applicant Tracking System (ATS). After creating the requisition, she returns to the Manage Requisitions page, clicks the drop-down arrow next to the requisition she wants to manage in SmashFly, and then clicks the "Manage" option. She is already logged into SmashFly, so the appropriate requisition to be marketed appears in her SmashFly view. She can take action on it from this view.

Scenario B:

A candidate, Jane, is interested in jobs at Acme Co. The candidate conducts an Internet search for "Acme Co. Jobs" and sees a SmashFly-generated SEO landing page in the search results. Jane clicks the link to visit the landing page that is advertising jobs. She then clicks "Apply Now" for a specific job and is sent to the SmashFly Opt-In form. She submits her name and email address on the form and is then sent directly to the first page of the Cornerstone application for that job. As Jane goes through the application workflow, she will see that her name and email address are pre-filled so that she does not have to enter them again.

Implementation

This functionality is only available for organizations that have signed a contract with SmashFly and are using Recruiting. This integration must be activated via the Edge Integration Marketplace. It is necessary to have an active account in SmashFly. When initiating the activation in Edge, you will send SmashFly the credentials you received from Cornerstone. You will then need to enter your tracking pixel code that you receive from your SmashFly account contact into the Edge Configuration area for SmashFly.

Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
CRM Integration - Manage	Grants ability to manage Recruitment Marketing actions on the Manage Requisitions page. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Application Workflow Template - Manage	Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.	Recruiting Administration
Default Requisition Template - Manage	Grants access to manage Default Requisition Template Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile 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	Recruiting

	<p><i>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>	
<p>Requisition Template – Application Workflow Template - Manage</p>	<p>Grants ability to set and edit Application Workflow Templates when editing Requisition Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.</p>	<p>Recruiting Administration</p>
<p>Requisition Template - Manage</p>	<p>Grants ability to access and view Requisition Templates. This permission cannot be constrained. This is an administrator permission.</p>	<p>Recruiting Administration</p>
<p>Requisition Template - View</p>	<p>Grants ability to access and view Requisition Templates. This is an administrator permission.</p>	<p>Recruiting Administration</p>

Enable SmashFly in Edge

The SmashFly integration must be enabled via the Edge Integrations page in the Edge Marketplace. A Tracking Pixel URL will need to be provided, which enables you to track Cornerstone applicant conversion in SmashFly. It is necessary to have an active account with SmashFly prior to enabling in Edge.

The following are the steps for enabling SmashFly in Edge:

1. Click the SmashFly tile in the edge Marketplace in order to request enablement. This sends an email with the Edge SmashFly credentials to your administrator.
2. Your administrator emails the Edge SmashFly credentials to your SmashFly account contact.
3. Your SmashFly account contact will set up your SmashFly environment.
4. Your SmashFly account contact will email you a tracking pixel URL.
5. Your administrator navigates to Edge Integrations and toggle on the SmashFly integrations.
6. Your administrator will navigate to Edge Integrations, click the SmashFly integration, and enter the tracking pixel URL into the input box provided.
7. Click **SAVE**.
8. Test the integration.
9. As a final step, your administrator may grant Recruiting users in your organization the CRM Integration - Manage permission, and you will be ready to get started using the SmashFly integration with Recruiting.

Your Cornerstone Client Success Manager (CSM) or Implementation Consultant will be available to assist your administrator with questions along the way.

Manage Requisitions - Recruitment Marketing

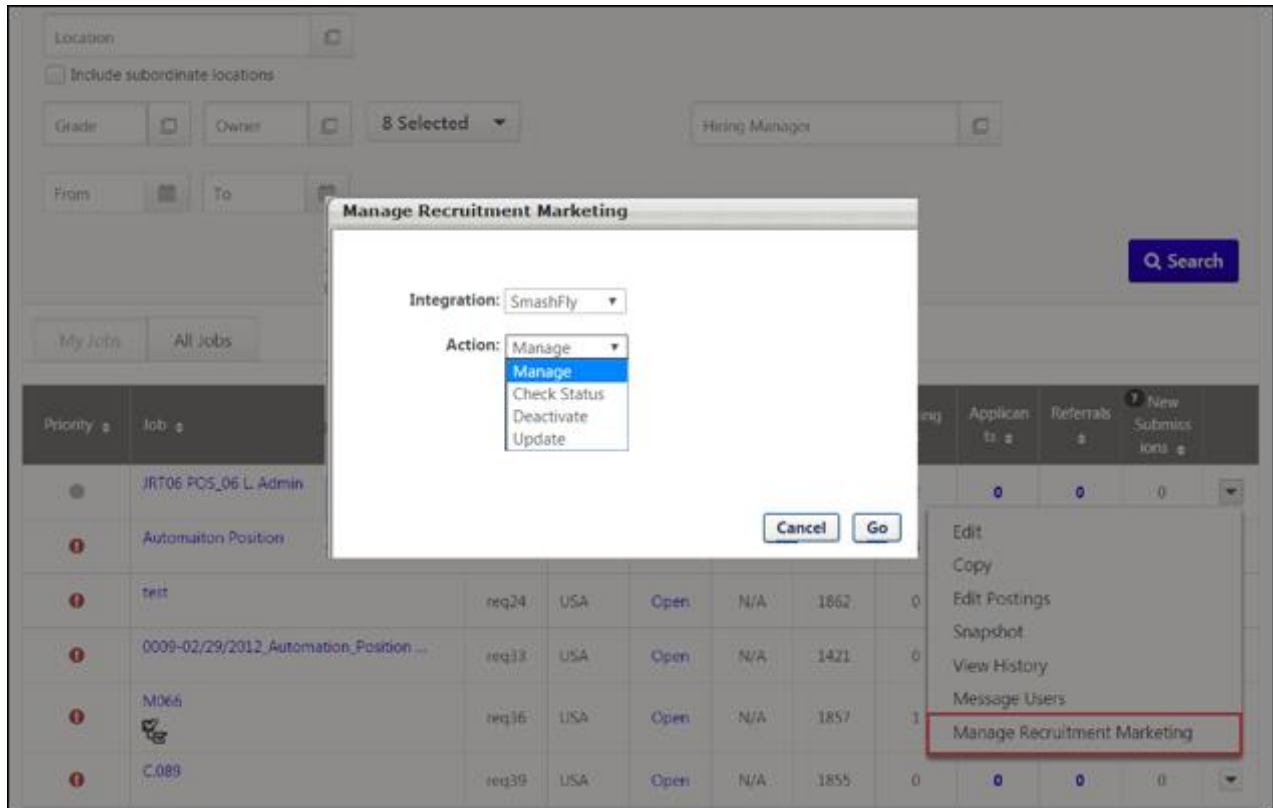
For portals that have an active integration with SmashFly, a **Manage Recruitment Marketing** option appears in the options drop-down for requisitions on the Manage Requisitions page. This option enables you to access the Manage Recruitment Marketing pop-up, which will enable you to click on several actions that send you into the SmashFly application. From there, you can manage marketing campaigns for the requisition.

Note: Users must have permission to manage CRM (Candidate Relationship Management) integrations.

To access job requisitions, go to **Recruit > Manage Requisition**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
CRM Integration - Manage	Grants ability to manage Recruitment Marketing actions on the Manage Requisitions page. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	<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



Manage Recruitment Marketing Pop-Up

This pop-up enables you to access the SmashFly application and manage marketing for the requisition. The following options are available:

- **Integration** - Select SmashFly to access the SmashFly actions.
- **Action** - The following SmashFly actions are available:
 - Manage -
 - Check Status -
 - Deactivate -
 - Update -

Once you have selected the SmashFly action, click **GO**. This opens the SmashFly application.

Application Workflow - Thank You Page

With this enhancement, you can now add a Thank You page to the application workflow. The page can be added on the application workflow template, requisition template, default requisition template, or requisition and child requisition.

The Thank You page appears for applicants after they click **SUBMIT** on the application. The page is available for mobile applications.

[Application Workflow Access Locations](#)

The application workflow is configured in the following areas of the Recruiting module:

- Application Workflow Templates - To access the Application Workflow Templates page, go to **Admin > Configuration Tools > Recruit**. Then, click the **Applicant Workflow Templates** link in the Applicant Tracking section.
- Default Requisition Templates - To access Default Requisition Templates, go to **Admin > Configuration Tools > Recruit**. Then, click the **Default Requisition Templates** link in the Applicant Tracking section.
- Job Requisitions - To manage job requisitions, go to **Recruit > Manage Requisition**.
- Requisition Templates - To access the Requisition Templates, go to **Admin > Configuration Tools > Recruit**. Then, click the **Requisition Templates** link in the Applicant Tracking section.

[Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Application Workflow Template - Manage	Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.	Recruiting Administration
Default Requisition Template - Manage	Grants access to manage Default Requisition Template Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

<p>Requisition: Owner</p>	<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>	<p>Recruiting</p>
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<p>Requisition: Reviewer</p>	<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>	<p>Recruiting</p>
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<p>Requisition Template – Application Workflow Template - Manage</p>	<p>Grants ability to set and edit Application Workflow Templates when editing Requisition Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.</p>	<p>Recruiting Administration</p>
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<p>Requisition</p>	<p>Grants ability to access and view Requisition</p>	<p>Recruiting</p>
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Template - Manage	Templates. This permission cannot be constrained. This is an administrator permission.	Administration
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Requisition Template - View	Grants ability to access and view Requisition Templates. This is an administrator permission.	Recruiting Administration
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Thank You Action Item

The Thank You action item is only available for the Submit Application section. This action item always appears as the last step of the application and cannot be moved to a different location in the workflow.

To add a Thank You page:

1. Click **Thank You** from the **Add Action Item** drop-down. This opens the Add Thank You pop-up.
2. Select the language for the page in the language drop-down. This option is only available for portals with multiple languages enabled.
3. Enter a Title in the **Title** field.
4. Enter instructions for the page in the **Instructions** field. The instructions appear above the Thank You page text.
5. Enter the text of the Thank You page in the **Text** field. HTML is accepted.

Add Thank You X

English (US) ▼

Title

Instructions:

B *I* U

Design HTML

Text:

B *I* U

Design HTML

Save **Cancel**

Preview Thank You Page

You can preview the Thank You page by clicking **PREVIEW**. This will open the Thank You page and allow you to see how it will look for applicants and determine if changes are needed.

Progress Recorded For Added/Moved Applicants

When adding or moving an applicant to a different requisition that has a Thank You page configured, the system will track the applicant's progress once they are added or moved.

In addition, applicants will not need to complete a Notes section when applying to the requisition to which they were moved if the text of the note is the same for both requisitions.

Applicant Experience

For applicants, the SmashFly experience involves completing an opt-in form to be added to the organization's email pool for new job requisitions. With this enhancement, applicants may also now see a Thank You page after submitting their application, which helps them know that their application has been received by your organization.

Opt-In Form

Applicants can complete an opt-in form by providing contact information to your organization. The form allows applicants to receive notifications about job opportunities.

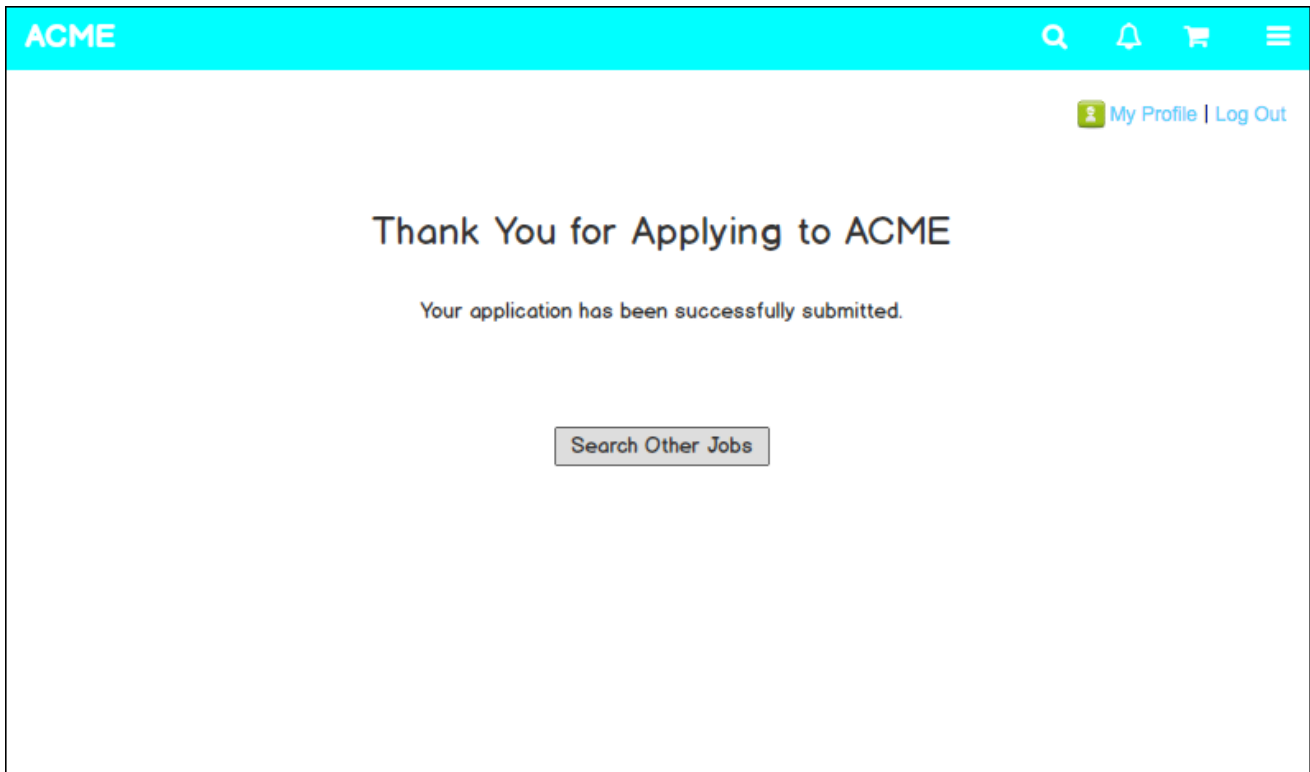
If the career site has been configured with the Apply as Guest functionality, then once the applicant fills in the form, they are directed to an Apply as Guest contact information page for the job. The name and email address the applicant provided on the opt-in form is populated automatically on the Apply as Guest page so that they do not need to enter this information again.

If Apply as Guest is not enabled for the career site, then when the applicant creates their profile on the career site, the name and email address the applicant provided on the opt-in form is populated automatically on the Create a Profile page in the career site.

Thank You Page

With this enhancement, a **Thank You page can now be configured** for the application workflow. If configured, then the page appears after the applicant clicks **SUBMIT** on the application.

From the Thank You page, external applicants can also click a **SEARCH OTHER JOBS** button to access the Search Jobs page, which helps keep the applicant on the career site browsing jobs. **Note:** *The button does not appear for internal applicants and recruiting agency recruiters.*



Updates to Equal Employment Opportunity Preferences

With this release, the **Record EEO** field is moved from Requisition and Applicant Preferences to Compliance Enablement Preferences. This change allows administrators to manage both of the EEO Category preferences (**Record EEO** and **Require EEO Job Categories**) at the Location Organizational Unit (OU) level. This ensures that the **EEO Category** field only appears on requisitions where it is relevant based on location.

For more information about this change, see the **Compliance Enablement Preferences** topic in the "Active Fields by Requisition Template" enhancement that is part of the August '17 release. *See **Compliance Enablement Preferences** on page 425 for additional information.*

Notes

- When the **Require OFCCP Compliance Enablement functionality** preference is selected, the **Record EEO** and **Require EEO Job Categories** fields will be checked and disabled by default; deselecting will uncheck these boxes.
- If **Require OFCCP Compliance Enablement functionality** is unchecked, then checking **Record EEO** enables the **Require EEO Job Categories** to be checked if desired. **Require EEO Job Categories** cannot be checked unless **Record EEO** is also checked.
- The **EEO Category** option is always visible on the requisition template. However, the visibility of this field on the requisition depends on which OU is selected when creating the requisition, and whether the **Record EEO** preference is checked for that OU [**Note: Compliance Enablement Preferences may be tied to Location, Division, or Position.**]. If a requisition is created from a template that has an **EEO Category** value, but the Location [or other OU] does not have the **Record EEO** preference checked, then **EEO Category** will not appear on the requisition and no **EEO Category** value will be saved to the requisition.

System Path/Enablement

Admin Path: Admin > Tools > Recruit > Compliance Enablement Preferences

Enablement: On by default. The **Record EEO** preference will be migrated as part of the release.

Succession

Employee Relationship in Succession Task Assignment

Employee Relationship in Succession Task Assignment

Prior to this enhancement, the Succession Management Planning (SMP) Manager task could only be assigned to managers, and the managers were responsible for assessing their subordinates. If an organization wanted to assign a task to an employee relationship other than manager, administrators would have to manually configure an assessor succession task by listing each assessor individually and assigning pre-configured groups of assessees.

With this enhancement, the SMP Manager Task is renamed to Employee Relationship Succession Task. In addition, the Employee Relationship Succession Task can be assigned to Manager, Indirect Manager, Dotted Line Manager, and other custom relationships that are defined in Employee Relationships Administration. This enables organizations to engage more employees in succession planning activities.

Use Cases

1. An administrator wants to assign a succession planning task to HR managers so that they can assess each user for whom they serve as HR manager.
2. The administrator creates an Employee Relationship Succession task. When setting the Availability, the administrator sets the Employee Relationship to HR Manager.
3. The administrator configures the rest of the task to include the appropriate assessees and saves the task. When the task is launched, all HR Managers for the selected assessees are assigned the task.

Considerations

Assessor, Talent Conference, and Job Pool tasks are not impacted by this enhancement.

Implementation

This functionality is automatically enabled for all organizations using the Succession functionality.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Employee Relationship Task - Create - Availability

With this enhancement, the Employee Relationship Succession Task can be assigned to Manager, Indirect Manager, Dotted Line Manager, and other custom relationships that are defined in Employee Relationships Administration. *See [Employee Relationships Administration](#).*

To create a Succession Management Planning (SMP) task, go to ADMIN > TOOLS > SUCCESSION MANAGEMENT > TASKS. Then, click the **Add SMP Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Page Instructions

When creating a succession task and the **Plan Type** field is set to Employee Relationship Succession Task on the General step, then the page instructions on the Availability step are updated.

Previously, the instructions were: "Determine the managers who will be assigned this task through Availability. Define criteria to filter which direct reports will appear before managers within the task. The total number of direct reports cannot exceed 250."

With this enhancement, the instructions are: "Define the relationships of the employee population being assessed and select the employees who will be assigned this task. The total number of employees being assessed cannot exceed 250."

Employee Relationship

When creating an Employee Relationship succession task, a new *Employee Relationship* section is now available on the Availability page. This section enables the administrator to determine which employee relationship will assess the employee population that is selected in the *Availability* section. For example, if Dotted Line Manager is selected in the **Employee Relationship** drop-down menu, then all users who are designated as Dotted Line Managers for a user within the selected Availability are assigned the task and will complete the succession task for all users in the Availability for whom they are designated as a Dotted Line Manager.

The drop-down contains Manager, Indirect Manager, Dotted Line Manager, and other custom relationships that are defined in Employee Relationships Administration. *See [Employee Relationships Administration](#).*

Custom employee relationships must be defined prior to creating the succession task. In addition, the employee relationship must be defined on a user's User Record in order for the task to be properly assigned for the user.

As previously implemented, if the task is configured to be dynamically assigned, then users are dynamically added to or removed from the task assignment if their organizational units (OUs) or relationships are changed.

Define Succession Task
Show Me

General

Availability

Co-Planners

Task Review

Confirm

Availability

Define the relationships of the employee population being assessed and select the employees who will be assigned this task. The total number of employees being assessed cannot exceed 250.

EMPLOYEE RELATIONSHIP

Determine the relationships of the employee population who will be assessed in this task.

AVAILABILITY

Define the employees who will be assigned this task though Availability.

Include Subordinates

All users in Corporation: Techwriter (Techwriter)

FILTER

Define criteria to filter which direct subordinates will appear for assessors within the task.

« Back
Cancel
Next »

Employee Relationship Task - Create - Confirm

On the SMP Task - Confirm page, a new **Employee relationship** value is now displayed when creating an Employee Relationship Succession Task. This value displays the employee relationship that was selected on the Availability step.

To create a Succession Management Planning (SMP) task, go to **ADMIN > TOOLS > SUCCESSION MANAGEMENT > TASKS**. Then, click the **Add SMP Task** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration

Define Succession Task

- General
- Availability
- Co-Planners
- Task Review
- Confirm

Confirm

Task Title:	2017 Talent Review
Description:	Please complete the 2017 Succession Planning Task. Reach out to talent@csod.com for any questions.
Task Owner Time Period:	6/21/2017 - 6/30/2017
Task Type:	Employee Relationship Succession Task
Template:	Annual Plan Template 2017
Employee relationship:	Manager
Availability:	Cornerstone Administration Division Client Admin Division

⏪ Back
Save
Cancel

"Manager" Task & Template Renamed "Employee Relationship"

With this enhancement, a Succession manager task can now be assigned to Manager, Indirect Manager, Dotted Line Manager, and other custom relationships that are defined in Employee Relationships Administration. As a result, the Manager task and template is renamed to Employee Relationship.

SMP Templates

On the SMP Templates page, the Manager Template type is renamed to Employee Relationship Template. This is reflected in the Type filter and display column.

SMP Templates

Templates

Configure succession management plan templates to be used in SMP tasks. All active templates can be pulled into SMP tasks. Once a templates is used in a SMP task, that template cannot be removed from the system, but the template may be set to inactive.

By Name: Type: Employee Relationship Template Display Inactive Templates Search

(15 Results)

[+ Add Template](#)

Title	Type	Active	Options
2010 Plan Template	Employee Relationship Template	<input checked="" type="checkbox"/>	
2014 SMP Assessor Template	Assessor Template	<input checked="" type="checkbox"/>	
2015 Talent Step	Employee Relationship Template	<input checked="" type="checkbox"/>	
Critical Positions Template	Job Pool Template	<input checked="" type="checkbox"/>	


SMP Template - Create

On the Define Template page, the SMP Manager Task type is renamed to Employee Relationship Succession Task. This is reflected in the Type setting.


Define Template















Template Properties

Specify which steps should be included in this succession management plan and what order these steps should appear in. You may configure each step by clicking on the Edit icon. Define the order of steps using drag and drop.

Name: 

Type:

STEPS 

Title	Type	Options
Overview	Freeform Step	 
Survey Step	Survey Step	 
Current Organization	Organization Chart Step	 
Profile	Profile Step	 
Metric Grid	Metric Grid Step	 
Succession Chart	Succession Chart Step	 
Batch Step	Batch Rating Step	 

SMP Task Administration

On the SMP Task Administration page, the SMP Manager Task type is renamed to Employee Relationship Succession Task. This is reflected in the Type filter.

Task Administration Show Me

SMP Task Administration

✦ Add SMP Task

Name: Type: Employee Relationship Succession Task Show completed/expired Search

(5 Results)

Name	Description	Created By	Task Period	Status	Active	Dynamically Assigned	Options
2016 Annual Talent Review	2016 Annual Talent Review - JC	Carter, Jessica	03/13/2017 - 07/14/2017	In Progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2017 Annual Talent Review	test	Carter, Jessica	06/15/2017 - 06/23/2017	In Progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2017 Talent Conference Task - Most...	2017 Talent Conference Task	Lolley, Jon	04/05/2017 - 12/31/2017	In Progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2017 Talent Review	Please complete the 2017 Succession Planning Task. Reach out to talent@csod.com for any questions.	Rack, Kathryn	04/19/2017 - 06/30/2017	In Progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2017 Talent Review	Please complete the 2017 Succession Planning Task. Reach out to talent@csod.com for any questions.	Lolley, Jon	04/02/2017 - 06/30/2017	In Progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Back Save

SMP Task - Create - General

On the SMP Task - General page, the SMP Manager Task type is renamed to Employee Relationship Succession Task. This is reflected in the Plan Type setting.

Define Succession Task Show Me

General

Task Name:

Description:

DETAILS

Task Period: From: To:

Note: If Task Reviews are configured for this task, the end time will be automatically extended to the Task Review due date.

Plan Type: Employee Relationship Succession Task

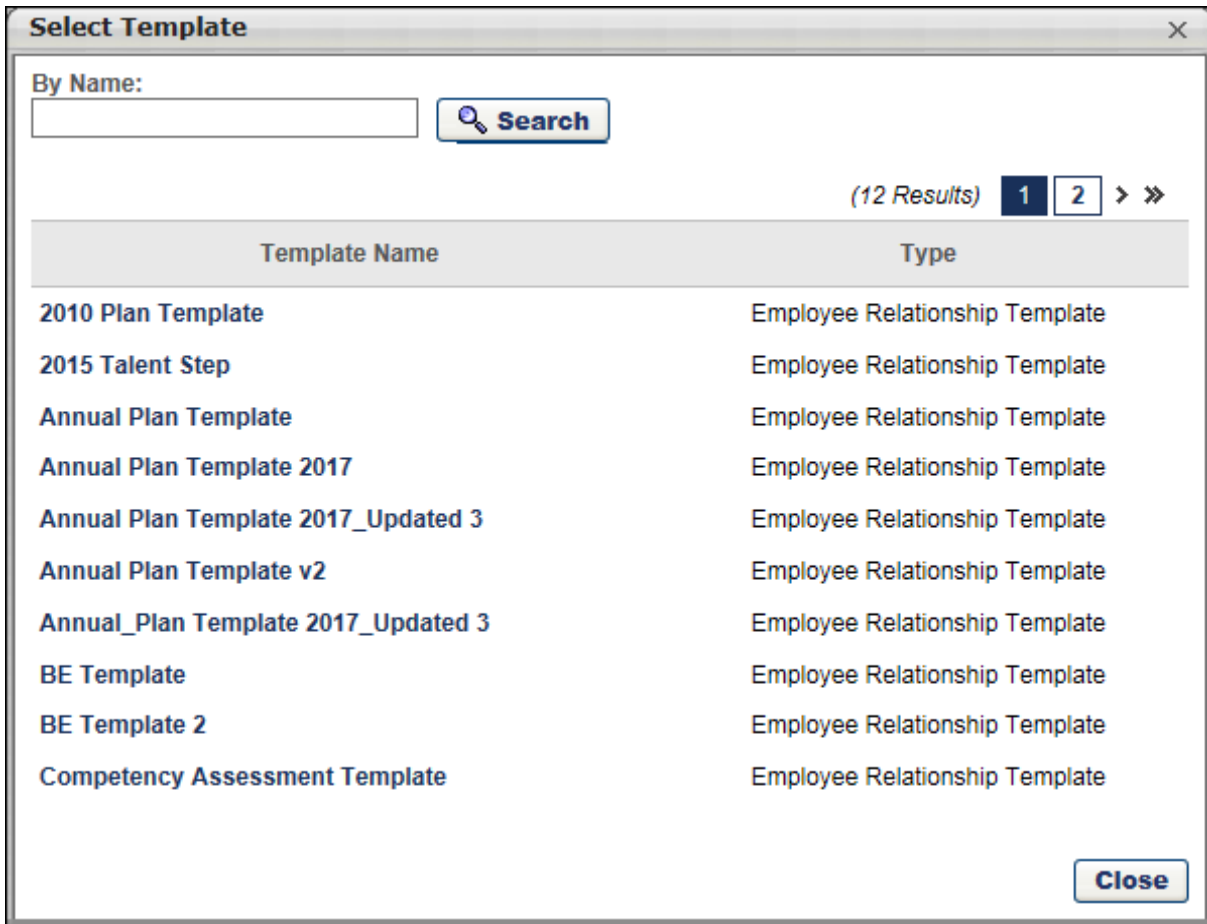
Template:

Pre-Populate Task with Most Recent Succession Data

Display Inactive Successors

Cancel Next >

When selecting a template within the Select Template pop-up, the Manager Template type is renamed to Employee Relationship Template. This is reflected in the Type column.



SMP Task - Create - Confirm

On the SMP Task - Confirm page, the SMP Manager Task type is renamed to Employee Relationship Succession Task. This is reflected in the Task Type value.

General

Availability

Co-Planners

Task Review

Confirm

Define Succession Task

Confirm

Task Title:	2017 Talent Review
Description:	Please complete the 2017 Succession Planning Task. Reach out to talent@csod.com for any questions.
Task Owner Time Period:	6/21/2017 - 6/30/2017
Task Type:	Employee Relationship Succession Task
Template:	Annual Plan Template 2017
Employee relationship:	Manager
Availability:	Cornerstone Administration Division Client Admin Division

⏪ Back
Save
Cancel

Scheduled Tasks

On the Scheduled Tasks page, the SMP Manager Task type is renamed to Employee Relationship Succession Task. This is reflected in the Type filter.

Scheduled Tasks

Tasks

Title: Type: All Types 🔍 Search

Show completed and expired tasks (3 Results)

Title	Description	Status	Start Date	Due Date
2015 Compensation Task	This is a pay for performance plan to reward ...	In Progress	7/2/2015	12/31/2015
2015 Talent Conference Task	2015 Talent Conference Task	In Progress	9/30/2015	12/31/2015
2015 Talent Conference Task - Most Recent Data	2015 Talent Conference Task	In Progress	9/30/2015	12/31/2015

Implementation

This functionality is automatically enabled for all organizations using the Succession functionality.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core

Org Chart & List View in Employee Relationship Task

Org Chart & List View in Employee Relationship Task

Prior to this enhancement, administrators could configure an Org Chart template for an Employee Relationship task to display the organizational structure as a chart or in a list. This view could not be changed when configuring or completing the succession task.

With this enhancement, users who are completing an employee relationship task can switch the Org Chart view between hierarchy and list. This enables the user to view the organizational structure in a way that is the most helpful to them. When an administrator configures an Org Chart template for an Employee Relationship task, they can configure which org chart display type (chart or list) is displayed by default.

Implementation

This functionality is automatically enabled for all organizations using the Succession functionality.

All existing Org Chart templates retain their display settings. However, this setting selection is now the default view, and users can switch between the Org Chart views within the task.

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration

Current Organization Template - Create - Default Display Type

Prior to this enhancement, administrators could configure an Org Chart template for an Employee Relationship task to display the organizational structure as a chart or in a list. This view could not be changed when configuring or completing the succession task.

With this enhancement, users who are completing an employee relationship task can switch the Org Chart view between hierarchy and list. This enables the user to view the organizational structure in a way that is the most helpful to them. When an administrator configures an Org Chart template for an Employee Relationship task, they can configure which org chart display type (chart or list) is displayed by default.

To create a succession planning template, go to **ADMIN > TOOLS > SUCCESSION MANAGEMENT > TEMPLATES**. Then, click the **Add Template** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration

Default Display Type


The Display Type option is renamed to Default Display Type. This option now determines the default display type for the Current Organization step. However, users can switch between view types within the succession task.

In addition, the following note is added below the **Default Display Type** option: "Note: Org Chart View is better viewed when there are no more than 50 employees in the task."


Define Current Organization Step



Step Properties

This step displays the direct subordinates of the manager. The manager can determine which direct subordinates to include in the succession plan. The manager will be prompted to complete the profile for every subordinate that is selected in this step.

Title: 

Directions:

B *I* U ☰ ☰ 





 Design  HTML

Default Display Type: Org Chart List

Note: Org Chart View is better viewed when there are no more than 50 employees in the task.

FIELDS

Up to 6 fields may be displayed for each user. Use drag and drop to order the fields.

Field	Display Name	Remove
Division	<input type="text" value="Division"/> 	
Position	<input type="text" value="Position"/> 	

Save

Cancel

Succession Task - Current Organization Step

With this enhancement, users can switch between org chart view and list view when completing the Current Organization step of an Employee Relationship task. A button is available in the upper-right corner of the step that allows the user to toggle between views. By default, the organization is displayed in the default display setting that is configured for the Current Organization template.

When switching between views, any user selections are preserved.

To open a succession planning task, go to **HOME > SCHEDULED TASKS**. Then, select the task name.

Permissions

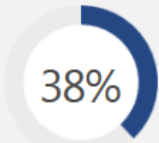
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task - View	Grants the ability to view succession tasks. This permission is dynamically assigned to a user when they are assigned any type of SMP task. However, this permission is not dynamically removed when the SMP task has ended. This permission cannot be constrained.	Talent/Succession

Org Chart View

Scheduled Tasks > 2017 Talent Review (Curtis Simms)
Options ▾

Current Organization

Please select the employees for which you would like to complete succession planning. If all employees are checked, they will all be included in the task.




OVERALL PROGRESS

7 users included | Include all | Include none

List View


2017 Talent Revi

- Overview
- Current Organ...
- Marissa And...>
- Timothy Bates>
- Tony Davis >
- Jacob Jackson>
- Richard Mart...>
- Carlos Santo >
- Ingrid Tomm >
- Batch Step
- Performance/...
- Succession Cl...




Curtis Simms
csimms
Vice President, Operations


7



Tony Davis
tdavis
Computer and Information Syst...



Jacob Jackson
jjackson
Manager

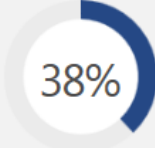


Richard Martin
rmartin
Production Manager

Previous
Save and Exit
Save and Continue

List View

Scheduled Tasks > 2017 Talent Review (Curtis Simms)
Options ▾



38%

OVERALL PROGRESS








2017 Talent Review

- Overview
- Current Organization
- Marissa Andrews >
- Timothy Bates >
- Tony Davis >
- Jacob Jackson >
- Richard Martin >
- Carlos Santo >
- Ingrid Tomm >
- Batch Step
- Performance/...
- Succession Plan

Current Organization

Please select the employees for which you would like to complete succession planning. If all employees are checked, they will all be included in the task.

7 users included Include all | Include none

Included	Name	Position	Division	Location
<input checked="" type="checkbox"/>	 Marissa Andrews mandrews	Director	Customer Service4	Chicago
<input checked="" type="checkbox"/>	 Timothy Bates tbates	Project Manager	Operations3	Los Angeles
<input checked="" type="checkbox"/>	 Tony Davis tdavis	Computer and Information Systems Manager	IT3	Los Angeles
<input checked="" type="checkbox"/>	 Jacob Jackson jjackson	Manager	Customer Service2	San Jose
<input checked="" type="checkbox"/>	 Richard Martin martin	Production Manager	Operations2	New York
<input checked="" type="checkbox"/>	 Carlos Santo csanto	Manager	Customer Service1	Los Angeles
<input checked="" type="checkbox"/>	 Ingrid Tomm itomm	Information Technology Director	IT1	San Jose

Succession Task Redesign New Task Auto-Upgrade

With the May 2017 release, the user experience of completing a succession task is enhanced with an improved look and feel and a streamlined task flow. This enables succession task assessors to follow clear and intuitive steps to review their talent and build a robust succession plan for key employees and positions. In addition, the redesigned succession task functionality is more responsive so that it can be completed on smaller devices, such as a tablet. This enhancement applies to all task types, including Succession Management Planning (SMP) Employee Relationship tasks, SMP Assessor tasks, Job Pool Succession tasks, and Talent Conference tasks.

With the August 2017 release, all succession tasks that are created following the release are automatically upgraded to the new design.

Considerations

Some organizations may have configured advanced HTML tags in the Free Form step and in the Step Description area of the SMP template. In this case, organizations should be sure to test HTML rendering during the User Acceptance Testing (UAT) period in order to verify the compatibility of the new design with existing succession task configurations.

After enabling the new design, Talent Profile Cards are not accessible. Organizations using My Team cannot access a user's Talent Profile Card by selecting their user photo in the Org Chart and Succession Chart steps of the succession task. Instead, organizations can configure the User Info flyout on the Org Chart Preferences page to display user record fields.

Implementation

This functionality is available to organizations using the Succession module.

This functionality is automatically enabled in Stage portals.

Administrators can enable this functionality via the Corporate Preferences page. Administrators can choose to enable the new design for only new succession tasks or for new and existing succession tasks. *See [Corporate Preferences](#).*

- With the August 2017 release, all new succession tasks automatically use the new design. All existing tasks may continue to use the legacy design.
- With the October 2017 release, all new and existing succession tasks will automatically use the new design.

Once the succession task redesign is enabled, this action cannot be reversed.

For portals that have Universal Profile enabled, these fields in the User Flyout will respect the configuration set up in Snapshot General Preferences: Goal Progress, Development Plan Progress, and Competency Assessment Score. All other portals will continue to use the MyTeam configuration for these fields.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	<p>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. Note: <i>For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.</i></p> <p>With the Aug '17 release, this permission also allows end users to view the Completions & Hours field, the training sidebar, and the Continue Learning carousel on the Learner Home page.</p>	Universal Profile
Candidate Search	<p>Grants ability to create, save and manage Candidate Searches, a search for users by various criteria such as performance and succession ratings, resume data, etc. The constraints that are applied to this permission determine the users that are available within a candidate search. This is an administrator permission.</p>	Talent/Succession - Administration
Corporate Preferences - Manage	<p>Grants ability to manage Corporate Preferences, which includes several portal-wide settings. This is an administrator permission.</p>	Core Administration
SMP Task - View	<p>Grants the ability to view succession tasks. This permission is dynamically assigned to a user when they are assigned any type of SMP task. However, this permission is not dynamically removed when the SMP task has ended. This permission cannot be constrained.</p>	Talent/Succession
Snapshot - Competencies	<p>Enables user to view the Competencies widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee</p>	Universal Profile

	Relationship. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i>	
Snapshot - Development Plans	Enables user to view the Development Plans widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i>	Universal Profile
Snapshot - Goals	Enables user to view the Goals widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission also enables the user to view the My Goals page for users within their permission constraints via the View All Goals option in various pages in Universal Profile. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. Best Practice: <i>For most users, this permission should be constrained by User Self and Subordinates.</i>	Universal Profile
Succession - Successor User Search	Grants ability to search for potential successors in a succession task. Users who do not have this permission cannot search for potential successors. The constraints that are applied to this permission limit the users who can be searched and added as potential successors. This permission can be constrained by OU, User's OU, Subordinates, Direct Reports, User, and User Self and Subordinates. This is an end user permission. Note: <i>This permission is <u>not</u> dynamically assigned to users who are designated as a co-planner. This permission must be added to the relevant security role in order for the co-planner to search for potential successors.</i>	Talent/Succession
Talent Profile -	Allow managers to view an employee's Talent Profile, which provides a quick view of the user's User Record, Resume,	Talent/Succession

View	Connect, and Career Center data, as well as comments made about the user. This permission can be constrained by User, User Self and Subordinates, Subordinates, OU, and User's OU.	
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Universal Profile: Succession Snapshot Responsive UI Redesign

Universal Profile: Succession Snapshot Responsive UI Redesign

With this enhancement, the Snapshot: Succession pages are now responsively designed so that the users can easily view and manage employee ratings and successors from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size. In addition, the following enhancements have been made to the Snapshot: Succession functionality:

- Administrators can now add Short Text Box and Scrolling Text Box succession custom fields to the Succession section via Snapshot Succession Preferences. These fields appear in the *Ratings* section on the Snapshot: Succession page.
- If the manager has permission to manage Snapshot Succession information, then the maximum number of allowed successors is displayed in the *Potential Successors* section of the Snapshot: Succession page.
- In the Add Successors drop-down menu in the *Potential Successors* section of the Snapshot: Succession page, the Talent Search option is renamed to Advanced Search.
- When a manager selects the Advanced Search or Recommended Successors option from the Add Successors drop-down menu, they are navigated to the Add Successor page, which enables the manager to view recommended successors and use the Advanced Search to search for successors.
- In the *Modification History* section of the Snapshot: Succession page, the "SMP Task" column header is renamed to "Task."
- Custom fields (ratings) that are displayed in the following sections of the Succession Snapshot now respect the availability that is set for the field in Custom Field Administration:
 - Ratings
 - Succession Information
 - Potential Successor for Incumbents and Positions

Use Cases

David is an operational manager at Acme. David is usually on the road visiting multiple company facilities across the United States. In addition to visiting facilities, David's responsibility is to lead the team of instructors and make sure that the team is up-to-date when it comes to succession planning activities. With this enhancement, David is able to use his tablet to provide succession planning ratings and nominate successors.

Implementation

This functionality is automatically enabled for all organizations using the Succession functionality.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot Succession - Manage	Enables user to view the Succession widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. On this page, users can view and manage successors and successor ratings. Users cannot view their own Succession widget and subpage, regardless of permissions. This permission can be constrained by User's Subordinates, User's Direct Subordinates, and Employee Relationship.	Universal Profile
Snapshot Succession - View	Enables user to view the Succession widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. On this page, users can view successors and successor ratings. Users cannot view their own Succession widget and subpage, regardless of permissions. This permission can be constrained by User's Subordinates, User's Direct Subordinates, and Employee Relationship.	Universal Profile
Succession Management Preferences	Enables administrators to view and edit the Snapshot Succession Preferences page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration

Snapshot Succession Preferences

With this enhancement, administrators can now add Short Text Box and Scrolling Text Box succession custom fields to the Succession section in Snapshot Succession Preferences. These fields can be configured to be editable or read-only using the **Editable** checkbox.

The fields that are added here appear in the *Ratings* section on the Snapshot: Succession page.

To access Snapshot Succession Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > UNIVERSAL PROFILE > SNAPSHOT SUCCESSION.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Succession Management Preferences	Enables administrators to view and edit the Snapshot Succession Preferences page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Talent/Succession - Administration

SUCCESSION

Add SMP Metric Field

Column 1	Column 2																								
Title	Title																								
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"> Performance</td> <td style="width: 20%; text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td> Potential</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td> Recommended Mentor</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td> Strengths</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> </table>	Performance	<input checked="" type="checkbox"/>	Potential	<input checked="" type="checkbox"/>	Recommended Mentor	<input checked="" type="checkbox"/>	Strengths	<input checked="" type="checkbox"/>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"> Impact of Loss</td> <td style="width: 20%; text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td> Probability of Loss</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td> Performance/Potential Grid</td> <td style="text-align: center;">N/A</td> </tr> <tr> <td style="padding-left: 20px;"><input checked="" type="radio"/> Use Original Criteria</td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input type="radio"/> Use Calibrated Criteria</td> <td></td> </tr> <tr> <td> Retention Risk Grid</td> <td style="text-align: center;">N/A</td> </tr> <tr> <td style="padding-left: 20px;"><input type="radio"/> Use Original Criteria</td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input checked="" type="radio"/> Use Calibrated Criteria</td> <td></td> </tr> </table>	Impact of Loss	<input checked="" type="checkbox"/>	Probability of Loss	<input checked="" type="checkbox"/>	Performance/Potential Grid	N/A	<input checked="" type="radio"/> Use Original Criteria		<input type="radio"/> Use Calibrated Criteria		Retention Risk Grid	N/A	<input type="radio"/> Use Original Criteria		<input checked="" type="radio"/> Use Calibrated Criteria	
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Snapshot: Succession

With this enhancement, the Snapshot: Succession pages are now responsively designed so that the users can easily view and use these pages from a mobile device. When these pages are viewed on a mobile device, the functionality on the page is automatically adjusted to fit the smaller screen size.

In addition, the following changes have been made to the Snapshot: Succession page:

- Administrators can now add Short Text Box and Scrolling Text Box succession custom fields to the Succession section via Snapshot Succession Preferences. These fields appear in the *Ratings* section on the Snapshot: Succession page.
- If the manager has permission to manage Snapshot Succession information, then the maximum number of allowed successors is displayed in the *Potential Successors* section of the Snapshot: Succession page.
- In the Add Successors drop-down menu in the *Potential Successors* section of the Snapshot: Succession page, the Talent Search option is renamed to Advanced Search.
- When a manager selects the Advanced Search or Recommended Successors option from the Add Successors drop-down menu, they are navigated to the Add Successor page, which enables the manager to view recommended successors and use the Advanced Search to search for successors.
- In the *Modification History* section of the Snapshot: Succession page, the "SMP Task" column header is renamed to "Task."
- Custom fields (ratings) that are displayed in the following sections of the Succession Snapshot now respect the availability that is set for the field in Custom Field Administration:
 - Ratings
 - Succession Information
 - Potential Successor for Incumbents and Positions

To access the Succession Snapshot page, go to **HOME > UNIVERSAL PROFILE**. Then, click the Snapshot tab. Then, click the Succession widget.

Permissions


PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot Succession - Manage	Enables user to view the Succession widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. On this page, users can view and manage successors and successor ratings. Users cannot view their own Succession widget and subpage, regardless of permissions. This permission can be constrained by User's Subordinates, User's Direct Subordinates, and Employee Relationship.	Universal Profile
Snapshot	Enables user to view the Succession widget and subpage within	Universal

<p>Succession - View</p>	<p>the Universal Profile - Snapshot page for users within their permission constraints. On this page, users can view successors and successor ratings. Users cannot view their own Succession widget and subpage, regardless of permissions. This permission can be constrained by User's Subordinates, User's Direct Subordinates, and Employee Relationship.</p>	<p>Profile</p>
<p>Succession - Successor User Search</p>	<p>Grants ability to search for potential successors in a succession task. Users who do not have this permission cannot search for potential successors. The constraints that are applied to this permission limit the users who can be searched and added as potential successors. This permission can be constrained by OU, User's OU, Subordinates, Direct Reports, User, and User Self and Subordinates. This is an end user permission.</p> <p>Note: <i>This permission is <u>not</u> dynamically assigned to users who are designated as a co-planner. This permission must be added to the relevant security role in order for the co-planner to search for potential successors.</i></p>	<p>Talent/Succession</p>


Home > Charles Cook > Snapshot

Succession My Team


Ratings




Performance
High



Impact of Loss
High



Potential
High




Probability of Loss
High

Recommended Mentor
Ryan Weston


Strengths
Patience, managing relationships

Potential Successors


Users
Position

 Add Successors

Maximum of 3 successor(s) is allowed



Curtis Simms
Vice President, Op...
csimms



Claire Smith
Vice President, Hu...
csmith

Charles is a potential successor for

Incumbents (0)
Position (0)

Charles is not a successor for any incumbents

Modification History

Action	Changed From	Changed To	User	Changed By	Task	Date
Successor (User) A...			Curtis Simms	Jon Lolley	2017 Talent Review	4/2/2017
Successor (User) A...			Claire Smith	Jon Lolley	2017 Talent Review	4/2/2017
Successor (User) R...			Curtis Simms	Jon Lolley	2017 Talent Review	4/2/2017
Successor (User) R...			Claire Smith	Jon Lolley	2017 Talent Review	4/2/2017
Successor (Positio...			Curtis Simms	Jon Lolley		6/30/2015
Successor (User) A...			Curtis Simms	Jon Lolley		6/30/2015
Successor (User) A...			Claire Smith	Jon Lolley		6/30/2015
Probability of Loss...	N/A	High				4/5/2011

Ratings

Administrators can now configure the Ratings section to include Short Text Box and Scrolling Text Box succession custom fields, and this is done via Snapshot Succession Preferences. [See Snapshot Succession Preferences](#) on page 571 *for additional information*.

As with other fields in this section, managers with the Snapshot Succession - View permission can view these fields and their values, and managers with the Snapshot Succession - Manage permission may be able to edit these fields depending on their configuration in Snapshot Succession Preferences. The fields are only available to the manager if the manager is within the field's availability settings. Modifications to these fields are tracked in the Modification History section. For Short Text Box fields, the character limit is 100. For Scrolling Text Box fields, the character limit is 3,000.

Potential Successors

Previously, the Potential Successors - User and Potential Successors - Position sections were separate. With this enhancement, these sections are combined into a single section, and managers can toggle between Users and Position using the corresponding tabs.

If the manager has permission to manage Snapshot Succession information, then the maximum number of allowed successors is displayed. When the maximum number of successors is reached for the user, then the **Options** drop-down menu is hidden.

The **Options** drop-down menu is only available when the Users tab is selected.

Potential Successors - Add Successors - Advanced Search

In the Add Successors drop-down menu in the Potential Successors section, the Talent Search option is renamed to Advanced Search.

The Advanced Search option previously opened the Advanced Search page in a pop-up. With this enhancement, this option opens the Add Successor page, which enables the manager to view recommended successors and use the Advanced Search to search for successors. This functionality is the same as what exists in the redesigned Employee Relationship or Assessor succession task. [See SMP Task - Succession Chart Step - Recommended Successors and Advanced Search \(Redesign\)](#).

Potential Successors - Add Successors - Recommended Successors

In the Add Successors drop-down menu in the Potential Successors section, the Recommended option is renamed to Recommended Successors.

The Recommended Successors option previously opened the Recommended Successors page in a pop-up. With this enhancement, this option opens the Add Successor page, which enables the manager to view recommended successors and use the Advanced Search to search for successors. This functionality is the same as what exists in the redesigned Employee Relationship or Assessor succession task. [See SMP Task - Succession Chart Step - Recommended Successors and Advanced Search \(Redesign\)](#).

Potential Successors - Add Successors - Add External

In the Add Successors drop-down menu in the Potential Successors section, the Name External option is renamed to Add External.

The Add External option previously opened an Add External Candidate pop-up. With this enhancement, this option opens the Add External Successor flyout. The fields are unchanged.

Note: *When an external successor is selected, "External Candidate" is displayed in their user card in the Potential Successors section.*

Potential Successors - Add Successors - Select User

In the Add Successors drop-down menu in the Potential Successors section, the Select User option previously opened the Select pop-up. With this enhancement, this option opens the Select User flyout. The search fields are combined to a single search field. This option is only available to managers who have permission to search for successors.

Potential Successor for Incumbents and Positions

Previously, the Succession Information - Incumbent and Succession Information - Position sections were separate. With this enhancement, these sections are combined into a single section, and managers can toggle between Incumbents and Position using the corresponding tabs. The number of incumbents or positions for which the user is a potential successor is displayed in parentheses within the tab.

Modification History

In the Modification History table, the following changes have been made:

- The appearance of the Modification History table is slightly changed.
- The SMP Task column is renamed to Task.