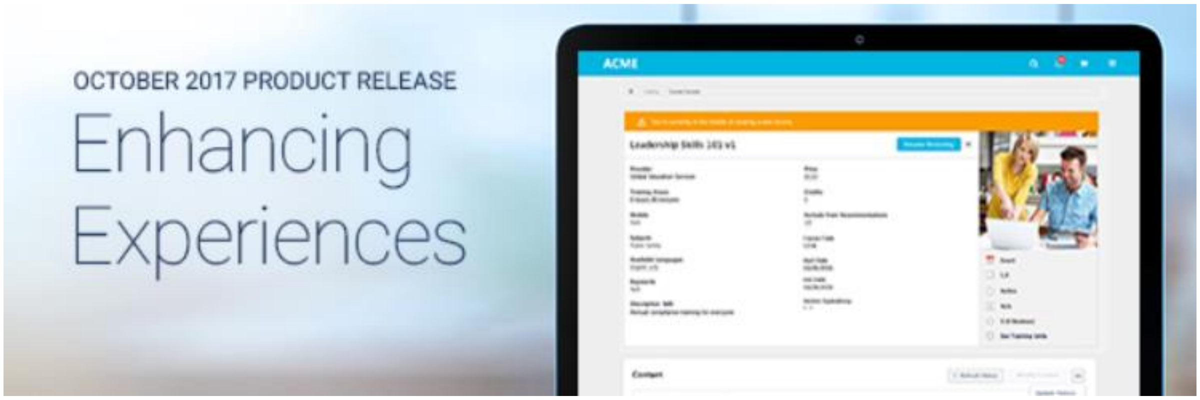

Cornerstone October 2017 Release Notes

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What's New for October 2017

What's New for October '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 October '17 Release** *on* page 18 *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 - October '17 Release** *on* page 22 *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 for October '17 Release** *on* page 23 *for additional information.*

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

The following new features and enhancements are available for the October '17 release as of 14 November 2017:

Core Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Akamai Video Player Upgrade	Akamai Video Player Upgrade	No	With this enhancement, the system's Akamai Video Player is updated to improve performance and better align with industry trends.
Custom Reports - User Record Fields	Custom Reports - User Record Fields	No	With this enhancement, the **Personal Email Address** field and the **Rehired Employee** field are available in custom reports. **Note:** *This enhancement is part of the* ***User Record - New Fields*** *enhancement for the October '17 release.*
Data Load Wizard	Data Load Wizard	No	In order to support the User Record - New Fields enhancement, two new

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Enhancements	Enhancements		fields are added for User data loads: Personal Email and Rehired Employee
End of IE9 Support	End of IE9 Support	No	In order to keep up with browser security requirements and the latest software enhancements, Cornerstone is discontinuing 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 the release.
KR Currency Symbol Update	KR Currency Symbol Update	No	The existing "KR" currency symbol is replaced with the local currency symbol for the following currencies: ○ Danish: KR is changed to DKK ○ Swedish: KR is changed to SEK ○ Norwegian: KR is changed to NOK ○ Estonian: KR is changed to EEK
Requisition Custom Field Optimization		No	Prior to this enhancement, the value for Requisition (Organizational Unit) custom fields that are configured as a Radio Button or Dropdown field type had to be entered manually on the Field Filters tab. With this enhancement, the option for entering a value has been removed. Now, the options that were configured for the custom field appear as a drop-down. The values must be selected from the drop-down.
Responsive Universal Profile Enhancements	Responsive Universal Profile Enhancements	No	With this enhancement, the My Team functionality, Options button, and the breadcrumbs within the Universal Profile are redesigned. These items

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			are now more responsive and easier to use on a mobile device. In addition, the navigation controls within the Universal Profile are improved to increase usability on smaller devices.
User Record - New Fields	User Record - New Fields Custom Reports - User Record Fields	No	New fields are added to the User Record page, including personal email, rehired employee, and new reasons for change. These fields allow for a standardized rehire process, which is part of a related enhancement for the October '17 release. *See* **Rehires Enhancement Overview** *on* page 292 *for additional information.* The **Personal Email Address** field and the **Rehired Employee** field are available in custom reports.

Cornerstone HR

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Data Load Wizard Enhancements	Data Load Wizard Enhancements	No	In order to support the User Record - New Fields enhancement, two new fields are added for User data loads: Personal Email and Rehired Employee
Forms - Auto-Fill Checked by Default	Forms - Auto-Fill Checked by Default	No	With this enhancement, the **Auto-Fill Response** setting is now selected by default when adding fields to a form, saving administrators time during the process of creating a new form or editing an unpublished form. This enhancement applies to all fields where **Auto-Fill Response** is an

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			option.
Org Chart - Inactive Cards	Org Chart - Inactive Cards	No	With this enhancement, the user card for managers who are inactive, on leave, or no longer with the organization can be changed to inactive to indicate the user's status. This helps executives and other managers know when a user is not actively managing their team. This can also act as a reminder that a team will need to be reassigned.
User Record - New Fields	Reason for Change - Additional Options	No	The Reason for Change section on the User Preferences page is updated with new reasons for change: Rehired and Termination.

Edge Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Recruiting Integration Connectors	Recruiting Integration Connectors	No	With this enhancement, integration specifications are exposed as "connectors" within API Explorer under Edge Develop. In addition, a code repository is available for developers, allowing them to quickly begin creating their portion of new integrations. These enhancements allow organizations to integrate with any background check or assessment vendor as long as they adhere to the workflow and specifications required by the Edge platform.
REST Services - Format Parameter	REST Services - Format Parameter	No	As of the August ’17 Release, to return results in JSON/XML, format types can be specified within the HTTP headers

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Deprecation	Deprecation (February '18 Release)		instead of within the path query string. In the February ‘18 Release, the ability to specify the format parameter in the query string will be deprecated. Please be sure to update web service requests to use the Content-Type parameter in the HTTP header before the February ‘18 Release to maintain uninterrupted service.

Engage Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Dashboard Usability Enhancements	Dashboard Usability Enhancements	No	With this enhancement, filter settings on the Engage Dashboard are also automatically saved so that any filter settings made by an administrator or manager are active the next time they access the page.
Delete Closed Campaigns	Delete Closed Campaign	No	With this enhancement, administrators can delete completed Engage campaigns from the Engage Admin Dashboard page, which helps reduce unnecessary page clutter.
Filter Enhancements	Filter Enhancements	No	With this enhancement, administrators can target groups and position organizational units (OUs) during campaign creation, allowing them to create more targeted campaigns with less effort. On the Engage Dashboard, administrators and managers can filter by position and campaign to view results that pertain directly to the data in which they are most interested.
Engage Emails	Engage Emails in	No	With this enhancement, email

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
in Email Administration	Email Administration		templates for Engage invitations and reminders are available alongside previously existing core email management templates, allowing administrators to create consistent, localized email templates for Engage system emails, while also supporting campaign customization.

Learning Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Child LO Upgraded During Curriculum Reversioning	Child Training Upgraded During Curriculum Versioning	No	With this enhancement, when a curriculum is reversioned, users with the original curriculum version on their transcripts are always upgraded to the newest version of the curriculum, as well as the latest version of child LOs within the curriculum.
Content Anytime	Content Anytime	Yes	Content Anytime is Cornerstone’s new collection of fresh, modern content, carefully curated from the world’s leading learning providers. Content Anytime is designed to empower organizations to fuel their employees’ curiosity, inspire them to grow, and help them drive their own career path. Seamlessly integrate Content Anytime with the new Cornerstone Learning Experience Platform to help employees be more productive, successful, and engaged.
Auto-Upgrade to	Auto-Upgrade to	No	Activating the new Content

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Content Publishing Redesign with Online Course Versioning in the August '18 Release	Content Publishing Redesign with Online Course Versioning in the August '18 Release		Publishing is optional until the August 2018 release. In August 2018, all portals still using old Course Publisher functionality will be automatically upgraded to the Content Publisher, and the old Course Publisher will no longer be accessible.
Content Publishing Redesign with Online Course Versioning	Content Publishing Redesign with Online Course Versioning	No	With this enhancement, administrators can upload, manage, and reversion online courses via new, streamlined processes using the Content Uploader and Course Console. The new Content Publishing functionality allows administrators to: ○ Initiate multiple course uploads at once and track upload progress ○ Manage courses from one location ○ Simplify and enhance version management with a flexible, intuitive set of new tools. ○ Easily make minor course content updates without creating new course versions
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 assignment criteria selected within learning assignments.
Launch xAPI Learning Records	Launch xAPI Learning Records	No	With this enhancement, users can launch completed xAPI

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			learning records directly from their learning transcripts.
Learner Home Enhancements	Learner Home Enhancements	No	With this release, administrators have more Learner Home preference options, and the Learner Home page has been updated to facilitate an improved user experience with subjects and training purposes.
Learning Search Enhancements	Learning Search Enhancements	No	With this enhancement, the Learning Search page is redesigned with the following features: ○ Four new filters, in addition to the three previously existing filters ○ New searching and filtering logic ○ New filter tags ○ Customized URLs with pre-filtered searches ○ Ability to add Learning Search as a navigation tab link ○ Updated user interface
Offline Player Enhancements	Offline Player Enhancements	No	With this enhancement, the following updates are available for the Offline Learning application and the Offline Network Player: ○ Online courses accessed through the offline player applications play in ALL browsers, as the Chromium mechanism which previously limited which browsers could be used is removed ○ HTML5-based courses can

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			now play in both offline player applications ○ Courses automatically launch using the learner's default browser for both offline player applications ○ Applications cannot be exited if a course is still running in either offline player application ○ Applications refresh to the Offline Transcript page after closing a course window ○ The Offline Learning application syncs with the transcript whenever an internet connection is available, not just according to the syncing schedule ○ The Offline Network Player application includes a Branding App, like the Offline Learning application ○ The Offline Network Player's offline transcript design is consistent with the online transcript design
Pending Post-Work Transcript Status for Sessions	Pending Post-Work Transcript Status for Sessions	No	With this enhancement, the Pending Post-Work status is now available for sessions. The status of Pending Post-Work/Past Due is also available when the session due date has passed, but the post-work has not yet been completed. This status is triggered when the roster is submitted for a session that includes required post-work. This allows administrators to track the progress and completion of

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			sessions with post-work.
Content Security - AICC and SCORM 1.2 ID Encryption	Content Security - AICC and SCORM 1.2 ID Encryption	No	With this enhancement, the session ID of SCORM 1.2 and AICC courses is automatically encrypted, and the Session ID value is visible in the URL when launching a course.
TTS Integration Through Edge	TTS Integration on Edge	No	Following this enhancement, administrators can add, configure, and activate the TTS integration using Edge, without intervention from GPS.

Mobile Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
SSO Authentication within Mobile Application	SSO Authentication within Mobile Application	No	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. **Note:** *This functionality was released with the September 8 patch release.*

Performance Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Custom	Custom Reports	No	When creating a custom performance

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Reports - Competency Fields	- Competency Fields		review report, the Performance Review Competency Section is renamed and enhanced to report on competency data from both Competency and Competency Assessment sections.

Planning

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Planning Tasks as Actions in Universal Profile	Planning Tasks as Actions in Universal Profile	No	With this enhancement, Planning tasks now appear in the Actions tab in Universal Profile. Emails are still sent to notify planners about tasks, but planners can now also find their Planning tasks in Universal Profile.

Recruiting and Onboarding Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Custom Reports - Recruiting Fields	Custom Reports - Recruiting Fields	No	With this enhancement, new fields are added and modified for Recruiting Custom Reports and Multi-Module Reports.
Forms - Auto-Fill Checked by Default	Forms - Auto-Fill Checked by Default	No	With this enhancement, the **Auto-Fill Response** setting is now selected by default when adding fields to a form, saving administrators time during the process of creating a new form or editing an unpublished form. This enhancement applies to all fields where **Auto-Fill Response** is an option.
Managed Hired	Managed Hired		With this enhancement, the user

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Applicants UI Redesign	Applicants UI Redesign		interface for the Manage Hired Applicants page is updated to match current styles.
My Profile - Application Progress Enhancement	My Profile - Application Progress Enhancement	No	The progress percentage that displays on an applicant's My Profile page in the career site has been removed with this enhancement. Applicants will no longer see a percentage of progress for their applications. Instead they will see "Complete" or "In Progress."
New User Record Fields	New User Record Fields	No	New fields are added to the User Record page, including personal email, rehired employee, and new reasons for change. These fields allow for a standardized rehire process, which is part of a related enhancement for the October '17 release. *See* **Rehires Enhancement Overview** *on* page 292 *for additional information.* **Note:** *This enhancement is cross-listed in Recruiting, as the new user record fields impact the Applicant Tracking System (ATS).*
Preboarding OU Configuration Auto-Upgrade	Preboarding OU Configuration Auto-Upgrade	No	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 was part of the August '17 release.
Rehires Enhancement	Rehires Enhancement	No	The Rehires enhancement enables you to recruit and rehire former employees who are eligible for rehire. This functionality is especially beneficial to organizations that have seasonal

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			positions and would like a more efficient hiring process for such jobs.

Succession Features

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Org Chart - Inactive Cards	Org Chart - Inactive Cards	No	With this enhancement, the user card for managers who are inactive, on leave, or no longer with the organization can be changed to inactive to indicate the user's status. This helps executives and other managers know when a user is not actively managing their team. This can also act as a reminder that a team will need to be reassigned.
Succession Task Redesign - All Tasks Auto-Upgrade	Succession Task Redesign - All Tasks Auto-Upgrade	No	With the October 2017 release, all new and existing succession tasks are automatically upgraded to the new design.

View

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
Org Chart - Inactive Cards	Org Chart - Inactive Cards	No	With this enhancement, the user card for managers who are inactive, on leave, or no longer with the organization can be changed to inactive to indicate the user's status. This helps executives and other managers know when a user is not actively managing their team. This can also act as a reminder that a team will need to be

FEATURE NAME FROM RELEASE NOTES	FEATURE NAME FROM RELEASE SUMMARY	CONTACT TO ENABLE?	DESCRIPTION
			reassigned.
View People - Increase Filter Max Capacity	View People - Increase Filter Max Capacity	No	With this enhancement, the number of filters that can be added to View People Preferences has increased as follows:

New and Enhanced Permissions for October '17 Release

New Permissions

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

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
Core	Users - Edit Personal Email Address	Enables administrator to edit the Personal Email Address for a user via the admin/users screen. This permission cannot be constrained. This is an administrator permission. By default, this permission is included in the System Administrator security role and parent roles of System Administrator.	Core Administration
Core	Users - View Personal Email Address	Enables administrator to view the Personal Email Address for a user via the admin/users screen. This permission cannot be constrained. This is an administrator permission. By default, this permission is included in the System Administrator security role and parent roles of System Administrator.	Core Administration
Learning	Online Class - Modify	Grants ability to modify an online class without creating a new version of the online class.	Learning Administration
Learning	Online Class - Publish	Grants access to three pieces of functionality: ○ Publish button on the Course Console, allowing administrator to publish a draft online class ○ Content Uploader page, where administrator can upload draft online classes ○ Upload section of the online class versioning workflow	Learning - Administration

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY
Learning	Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission.	Learning - Administration
Learning	Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission.	Learning - Administration
Learning	Content Uploader - Manage Uploads with Undefined Providers.	Allows administrators to view and manage uploads with undefined providers on the Uploads History page.	Learning - Administration
Learning	Upload History - View	Grants ability to view the Upload History page.	Learning - Administration
Learning	Online Class Versioning Preferences	Grants ability to set default options for the online class versioning process. This is an administrator permission.	Learning - Administration
Learning	Content Publishing - Self Activation	Grants access to the Content Activate Preferences page, where an administrator can activate new Learning Features associated with the Content Publishing Features and Online Course Versioning.	Learning - Administration

PRODUCT	PERMISSION NAME	PERMISSION DESCRIPTION	PERMISSION CATEGORY

Enhanced Permissions

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

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
Learning	Course Catalog - Update	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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration
Learning	Course Publisher	Grants access to LCMS Course Publisher, which enables upload and publishing of SCORM and AICC compliant online courses, created either in the LCMS Course Builder, or from a third party course building tool. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator	Learning - Administration

PRODUCT	PERMISSION NAME	PERMISSION UPDATE	PERMISSION CATEGORY
		permission. 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.	
Learning	Course Publisher Update	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. 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.	Learning - Administration

Master List of New Report Fields - October '17 Release

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

Learning

FIELD NAME	SECTION	CUSTOM REPORT NAME
Assignment User Criteria (OU Type)	Assignment Section	Assignment Report, Transcript Report
Assignment User Criteria (OU Description)	Assignment Section	Assignment Report, Transcript Report
Assignment User Criteria (OU Owner - Name)	Assignment Section	Assignment Report, Transcript Report
Assignment User Criteria (OU Owner - User ID)	Assignment Section	Assignment Report, Transcript Report
Assignment User Criteria (OU Parent)	Assignment Section	Assignment Report, Transcript Report

Recruiting

FIELD NAME	SECTION	CUSTOM REPORT NAME
External Applicant ID	Application	Recruiting
Requisition Creation Date	Requisition	Recruiting and Multi-Module
Requisition Primary Owner Email	Requisition	Recruiting and Multi-Module
Requisition Owner Email	Requisition	Recruiting and Multi-Module
Hiring Manager Email	Requisition	Recruiting and Multi-Module

Release Notes Updates for October '17 Release

Changes have been made on 14 November 2017, to the release notes for the October '17 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Akamai Video Player Upgrade	Akamai Video Player Upgrade	Added a *MP4 Video Additional Configuration* section to describe additional configuration requirements for organizations using mp4 videos.
Requisition Custom Field Optimization	Requisition Custom Field Optimization	This is a new enhancement that has been added with the October '17 release.

Changes have been made on 10 November 2017, to the release notes for the October '17 release:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Content Publishing Redesign	Content Publishing Redesign - Overview	Updated three Online Class permissions to indicate which permissions provide access to the Content Uploader page. *See* **Content Uploader Permissions** *on* page 30 *for additional information.*

Changes have been made on 27 October 2017, to the release notes for the October '17 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Responsive Universal	Responsive Universal	Removed references to the ability

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Profile Enhancements	Profile Enhancements Responsive Universal Profile - View Team Flyout	to change the name of the View Team button. Updated references of "My Team" button and flyout to "View Team."

Edge

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Recruiting Integration Connectors	Create Connection	Removed note that external development teams can contact Global Product Support (GPS) regarding Edge. External development teams with no named Care administrators cannot contact GPS. Instead, external development teams can contact the following support inbox: dledgeconnectorsupport@csod.com

Engage

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Core Email Template Integration	Core Email Template Integration	Added a best practice regarding availability to the Considerations section.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Connect Streams Free Version (Early Adopter)	Connect Streams Free Version (Early Adopter) Streams Preferences Connect Streams Page Connect Streams - Live Stream	Identified a limitation that hosting a screenshare is currently limited to Firefox browsers. There is a longer term effort to support screensharing on Chrome and Internet Explorer browsers. Please note that any browser can view a shared screen.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Page Connect Streams Frequently Asked Questions (FAQs)	
Connect Streams Free Version (Early Adopter)	Connect Streams Frequently Asked Questions (FAQs)	Add the following additional FAQs: What browsers allow me to share my screen? Currently, hosting a screenshare is limited to Firefox browsers. However, viewing the screenshare of another user is available in any browser. What browsers allow me to use Webinar Chat and Video Chat? Currently, this functionality is limited to Chrome and Firefox browsers. Why is Video Chat not working? This is likely because your computer is behind a firewall. To resolve this, ask your IT department to "allow outbound UDP traffic."
Content Publishing Redesign	Access Content Uploader from Learning Admin Console	Added additional topic with information about accessing the Content Uploader page from the Learning Admin Console.
Content Publishing Redesign	Add Content Uploader to Navigation Tabs	Added note stating that the Content Uploader link is not automatically added to navigation tabs. This must be done manually.
Learning Search Enhancements	Learning Search - Subject IDs	Added topic to highlight addition of the ID column to the Subjects Management page.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Custom Reports - Competency Fields	Master List of New Report Fields - October '17 Release	Removed the performance review competency fields. These fields are existing fields that were updated, so they should not be included in this topic.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Rehires Enhancement	Rehires Enhancement Overview	Indicated that the "Eligible for Rehire" field is not a new field. This is an existing field on the User Record page.

Changes have been made on 16 October 2017, to the release notes for the October '17 release:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Akamai Video Player Upgrade	Akamai Video Player Upgrade	Added the following browser types to the enhancement: ○ Edge ○ Safari
KR Currency Symbol Update	KR Currency Symbol Update	Updated all references of "currency code" to "currency symbol."

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Connect Streams Free Version (Early Adopter)	Connect Streams Free Version (Early Adopter)	Indicated that this functionality is not available to test in Stage portals during UAT.
Content Security - AICC and SCORM 1.2 ID Encryption	Content Security - AICC and SCORM 1.2 ID Encryption	Added note to clarify that all requests to opt out of ID Encryption in Production environments must be submitted to Global Product Support (GPS) by Tuesday, October 17th.
Content Publishing Redesign	Add Content Publisher to Navigation Tabs	Content Uploader can now be added as a link to a navigation tab. This new topic explains how.
Learner Home	Learner Home	Added a consideration stating: Machine

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Enhancements	Enhancements - Overview	Learning will be refreshed once during the first half of UAT.
Learning Search Enhancements	Learning Search Enhancements - Overview	Added a consideration stating: Machine Learning will be refreshed once during the first half of UAT.

10 November Patch Release Functionality

What's New for the 10 November 2017 Patch Release

The following is released along with the 10 November 2017 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	**Content Uploader Permissions**	With this enhancement, users can only access the Content Uploader page if they have the permission for uploading online classes. The permissions for uploading online classes and new versions of online classes no longer provide access to the Content Uploader page by themselves, but these permissions are otherwise unaffected.
Learning	**Provider IDs**	With this enhancement, an ID column has been added to the Training Providers page, to support the creation of custom Learning Search URL filters.
Recruiting	**Universal Background Screening Integration**	With this enhancement, Universal Background Screening integrations are now available through the Edge Marketplace. The Universal Background Screening integration allows you to place and track background checks for applicants. This integration allows organizations to choose a background vendor that fits their needs and budget, get the best satisfaction from the product, and minimize change management within their organization.

Content Uploader Permissions

With the November 10, 2017 patch, updates have been made to the permissions that provide access to the Content Uploader page. Previously, users could access the Content Uploader page with either the permission for uploading online classes, the permission for uploading online classes, or the permission for publishing new versions of online classes.

With this enhancement, users can only access the Content Uploader page if they have the permission for uploading online classes. The permissions for uploading online classes and new versions of online classes no longer provide access to the Content Uploader page by themselves, but these permissions are otherwise unaffected.

Considerations

In portals where Content Publishing functionality has already been activated, users who had the Course Publisher permission were automatically assigned the permissions for uploading and publishing online classes. If no further updates were made to users' permissions following the activation, this enhancement has no impact. However, if you only assigned users one of the three permissions which previously granted access to the Content Uploader page, you should ensure that users who should have access to the Content Uploader page have the Online Class - Upload permission.

Implementation

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

Permissions

The following permissions are affected by this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Online Class - Publish	Grants access to two pieces of functionality: ○ Publish button on the Course Console, allowing administrator to publish a draft online class ○ Upload section of the online class versioning workflow As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This	Learning - Administration

	permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	
Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission. As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration

Provider IDs

With this enhancement, an ID column has been added to the Training Providers page, to support the creation of custom Learning Search URL filters. Provider IDs can be used to create custom Learning Search URLs which can navigate users to the Learning Search page, pre-filtered for training associated with a specific subject.

To access the Training Providers page, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > PROVIDERS.

See **Learning Search - Custom URL Filters** *on* page 251 *for additional information.*

Universal Background Screening Integration

Universal Background Screening Integration Overview

With this enhancement, Universal Background Screening integrations are now available through the Edge Marketplace. The Universal Background Screening integration allows you to place and track background checks for applicants.

This integration allows organizations to choose a background vendor that fits their needs and budget, get the best satisfaction from the product, and minimize change management within their organization.

Use Cases

Use Case 1: Activate the Universal Background Screening integration through Edge

1. Barbara is Acme Company's administrator who has been tasked with enabling the integration with Universal Background. This will allow Acme to include Universal Background Screening requests within their application workflow.
2. Barbara goes to the Edge Marketplace to purchase and activate the Universal Background Screening background check integration.
3. From the Edge Integrate page, Barbara enters Acme's unique Client Account ID, which is provided by their Universal Background Screening project team.
4. Acme's Cornerstone portal now has an active integration between Cornerstone and Universal Background Screening.

Use Case 2: Recruiting Admin creates a custom applicant status

1. Katie is the recruiting administrator for Acme Company.
2. Ryan, a hiring manager at Acme, is looking to add a new member to his Marketing team.
3. With the integration enabled, Katie is tasked with adding the Universal Background Screening status in all of Acme's marketing job requisitions.
4. Katie creates a new custom applicant status that is set to a custom integration type under Universal Background Screening.
5. Katie creates a new job requisition that includes that new custom applicant status
6. Katie has now configured the Marketing job requisitions to include the Universal Background Screening custom applicant status.

Use Case 3: Recruiter assigns a candidate to a background check request

1. Dorothy, a recruiter at Acme, has identified James to be a stellar applicant.
2. To ensure a sound hiring decision is made and to protect Acme from potential risks, Dorothy assigns a background check screening on John by moving the status to Universal Background Screening.
3. Dorothy clicks on the **Assign to Applicant** link on the Statuses tab, and a pop-up window appears. Dorothy confirms that background check provider then clicks on the **SUBMIT** button.
4. Dorothy is redirected to the Universal Background Screening system where she can select the appropriate background check package to assign to James.

5. James receives an email from Universal Background Screening and clicks the link to complete the screening application request in Universal Background Screening

Use Case 4: Recruiter views background check screening updates/results and a detailed report in Universal Background Screening via a link

1. Dorothy is eager to find out the results of James's background check status.
2. Dorothy navigates to James's Applicant Profile Status page and sees the status on the request.
3. To view additional details of the background request, Dorothy clicks on the **View Progress** link, which will direct her to the Universal Background Screening site.

Implementation

The Universal Background Screening integration must be enabled and activated through the Edge Marketplace. Portals must have already purchased Universal Background Screening in order to enable it in Edge.

During enablement, you will need to provide your pre-existing Universal Background Screening identifiers.

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.	Recruiting

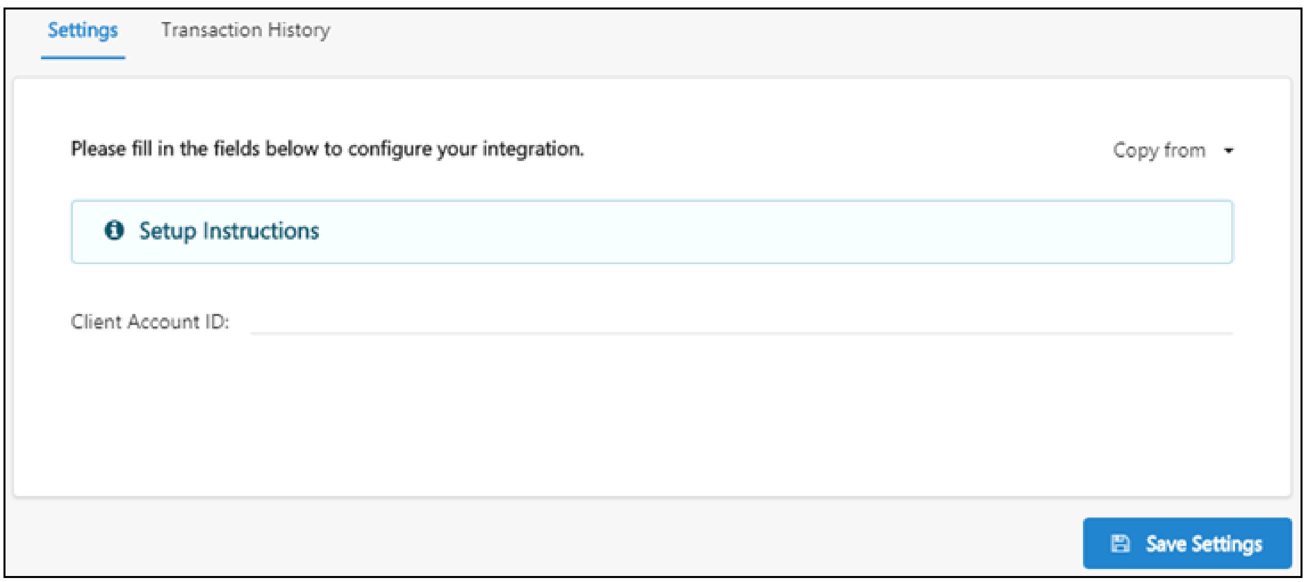
	This permission cannot be constrained.	
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more*	Recruiting

	information about duplicate reviewer instances.	

Enable Universal Background Screening in Edge

To enable the Universal Background Screening integration in Edge, perform the actions listed below.

1. Select and purchase the Universal Background Screening background check integration through the Edge Marketplace
    - Navigation: Admin > Tools > Edge > Marketplace
2. Activate the Universal Background Screening background check integration on Edge Integrate
    - Navigation: Admin > Tools > Edge > Integrate
3. Configure the integration on the Edge Settings page
    - **Client Account ID** - This is the client's unique identifier that enables Universal Background Screening to authorize background check submissions from Cornerstone. This code is provided by the client's Universal Background Screening project team.



Additional Information

- You must have an existing contract with Universal Background Screening.
- You must work with your Universal Background Screening 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.

Applicant Statuses - Create Custom Integration Status

In order for the Universal Background Screening status to be available to select for applicants, it is necessary to create a custom integration status in Manage Applicant Statuses.

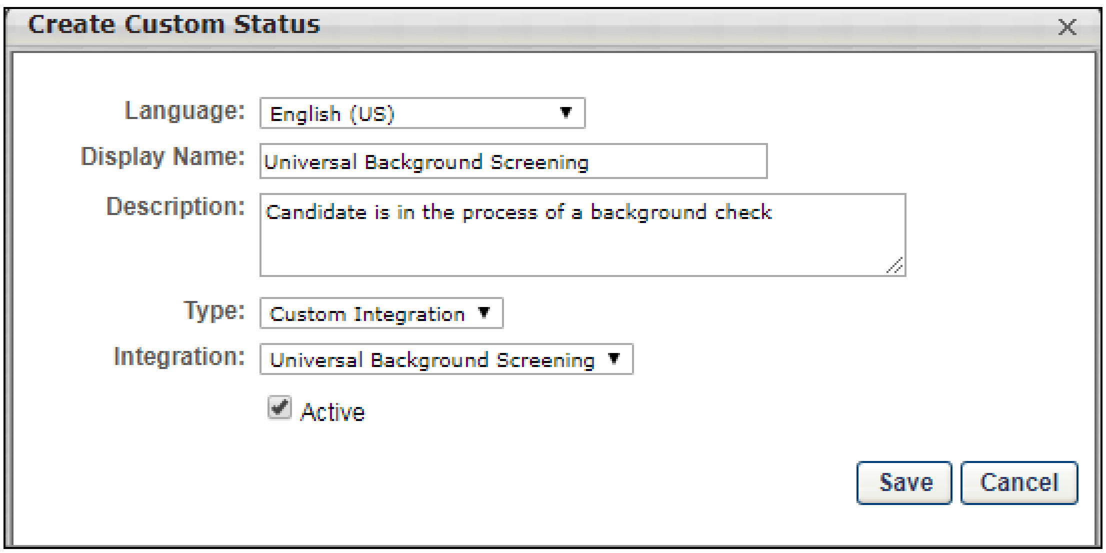
To create a custom applicant status, go to ADMIN > TOOLS > RECRUIT > APPLICANT STATUSES. Then click the **Create Custom Status** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration

To create a custom integration status for Universal Background Screening:

1. Navigate to ADMIN > TOOLS > RECRUIT > APPLICANT STATUSES.
2. Click the **Create Custom Status** link. This opens the Create Custom Status pop-up.



3. Complete the following fields in the Create Custom Status pop-up:
   A. **Language** - If multiple languages are enabled, from the drop-down list select the language in which you are entering the status name and description. To localize the status name and description into other available languages, select the appropriate language from the drop-down list and enter the localized name and description in the appropriate fields.
   B. **Display Name** - Enter "Universal Background Screening" to identify the status as being specifically for Universal Background Screening.
   C. **Description** - Enter a description, up to 500 characters. As a best practice, provide a description that helps recruiters understand the purpose of this status.
   D. **Type** - Select "Custom Integration." The Custom Integration status type mans that the applicant is in an integration step of the status workflow.

E. **Integration** - Select "Universal Background Screening" in this field, which will associate the custom status to Universal Background Screening.
F. **Active** - This option is selected by default and means the status will be available to include in status workflows.

4. Click **SAVE** to save the custom status. Your new custom integration status will be visible in the list of statuses on the Manage Applicant Statuses page.

Map Education and Experience Fields

In order for Universal Background Screening (UBS) to retrieve the applicant's data, specific resume fields will need to be mapped.

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 in the Education and Employment fields that are mapped for UBS when filling out the application.*

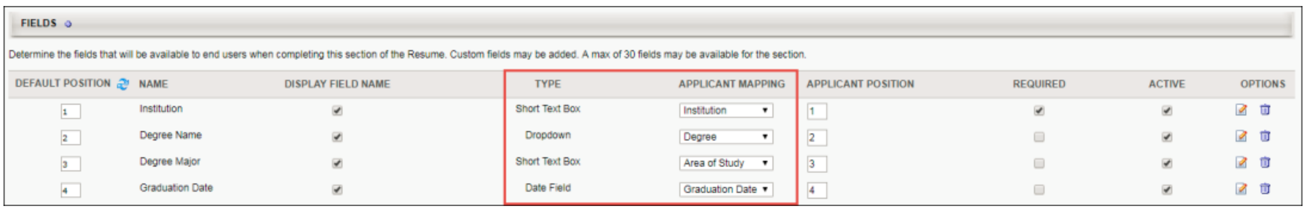
Education Fields

Education fields must be mapped in Succession > Resume in order for Cornerstone to pass the applicant's data to UBS. 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 UBS, but it must be mapped to the correctly corresponding Applicant Mapping field in your portal in order for the data to pass successfully to UBS.

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. Configure or create the following fields and select the appropriate mapping option in the Applicant Mapping column:

FIELD NAME IN UBS	SELECT THIS OPTION IN DROP-DOWN IN APPLICANT MAPPING COLUMN	FIELD TYPE
SchoolName (**Note:** *A field on the resume in Cornerstone must be mapped to this field in UBS in order for UBS to process the data.*)	Institution (**Note:** *Be sure to check the box in the Required column for this field.*)	Short Text Box
DegreeName	Degree	Dropdown
DegreeMajor	Area of Study	Short Text Box
Degree Date (**Note:** *This field is not required for the integration to run successfully. This field can be left out of the mapping if you do not wish to capture this data.*)	Graduation Date	Date Field



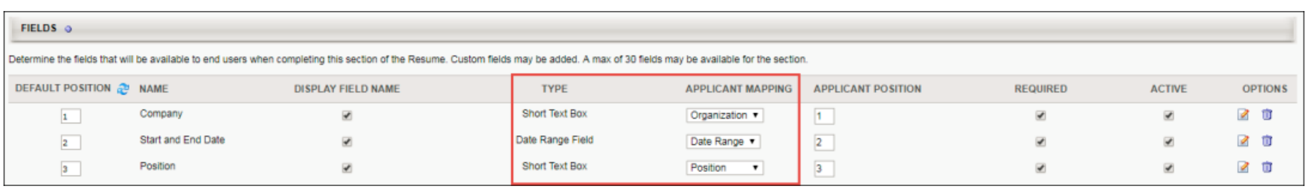
Employment Fields

Employment fields must be mapped in Succession > Resume in order for Cornerstone to pass the applicant's data to UBS. The name of the field in Cornerstone (as defined in the **Field Name** field on the Add Field pop-up on the Resume > Previous Positions page) does not need to match the name of the field in UBS, but it must be mapped to the correctly corresponding Applicant Mapping field in your portal in order for the data to pass successfully to UBS.

To map the fields:

1. Navigate to ADMIN > TOOLS > SUCCESSION MANAGEMENT > RESUME.
2. Select the Edit icon in the Previous Positions row.
3. Ensure that **Experience** is selected in the **Applicant Resume** drop-down.
4. Configure or create the following fields and select the appropriate mapping option in the Applicant Mapping column:

FIELD NAME IN UBS	SELECT THIS OPTION IN DROP-DOWN IN APPLICANT MAPPING COLUMN	FIELD TYPE
EmployerOrgName	Organization	Short Text Box
Title	Position	Short Text Box
Start and End Date (**Note:** *This field is not required for the integration to run successfully. This field can be left out of the mapping if you do not wish to capture this data.*)	Date Range	Date Range Field



Candidate Reference Data

In order for Universal Background Screening (UBS) 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 text of the question in Cornerstone does not need to match the name of the field in UBS, but it must be mapped to the correctly corresponding API label in your portal in order for the data to pass successfully to UBS.

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 UBS.

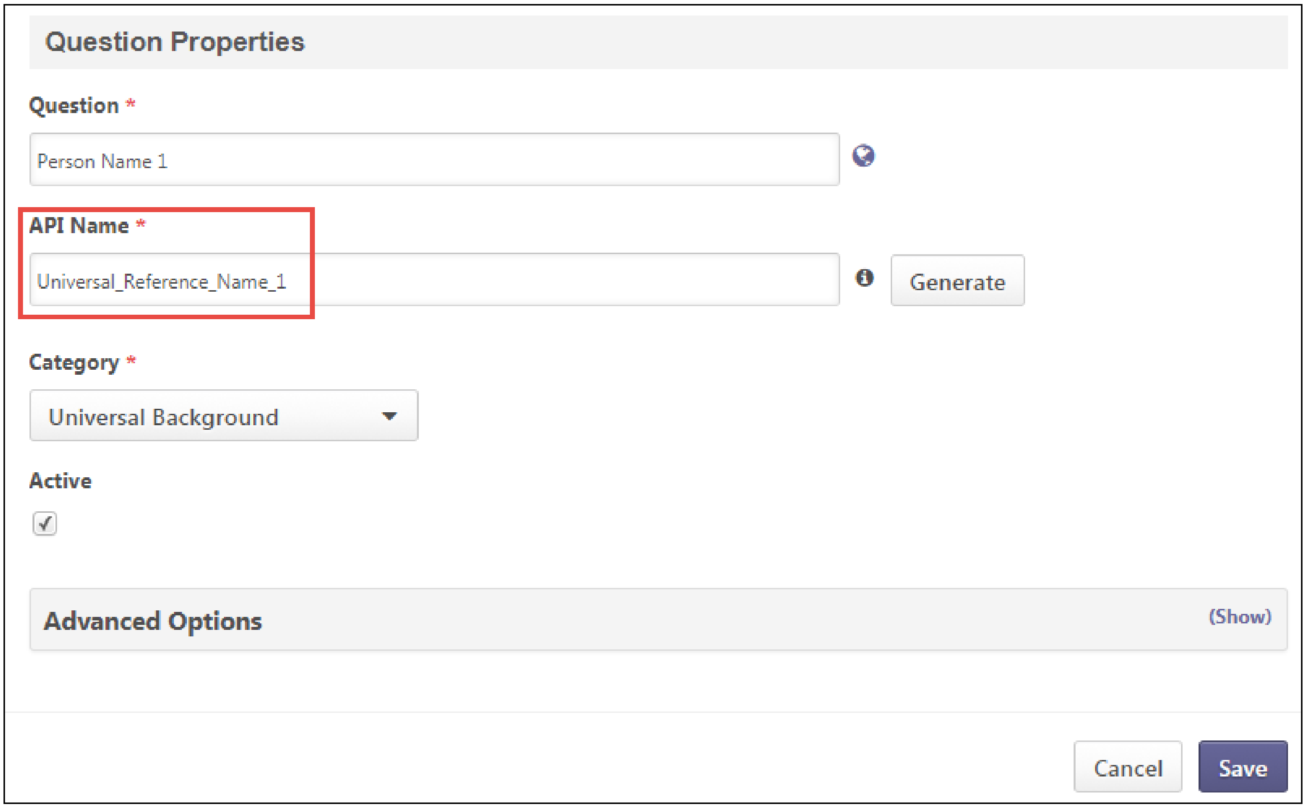
Create Questions

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 UBS" column indicates the exact name of the field in UBS. You can use the UBS 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 UBS	ENTER THIS API IN THE API NAME FIELD ON THE CREATE QUESTION PAGE	FIELD TYPE
SET 1		
Person Name	Universal_Reference_Name_1	Text
Formatted Number	Universal_Reference_Phone_1	Text
Relationship	Universal_Reference_Relationship_1	Text
SET 2		
Person Name	Universal_Reference_Name_2	Text
Formatted Number	Universal_Reference_Phone_2	Text
Relationship	Universal_Reference_Relationship_2	Text
SET 3		
Person Name	Universal_Reference_Name_3	Text

FIELD NAME IN UBS	ENTER THIS API IN THE API NAME FIELD ON THE CREATE QUESTION PAGE	FIELD TYPE
Formatted Number	Universal_Reference_Phone_3	Text
Relationship	Universal_Reference_Relationship_3	Text



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 Universal_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 UBS. *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.

Assign Universal Background Screening

The Universal Background Screening can be assigned from the Applicant Profile > Statuses tab. The applicant's status must be changed to the custom Universal Background Screening status in order for the background screening to be available to assign.

Permissions

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 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
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
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*	Recruiting

	requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Requisition: Reviewer	Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained. **Note:** *This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.* **Note:** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* ***Applicant Profile Page Overview*** *for more information about duplicate reviewer instances.*	Recruiting

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Assign Integration Assessment	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. **Note:** *The APPLICANT.INTEGRATION.ASSESSMENT.LINK tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.*	Recruiting

Assign from Applicant Profile

To assign from the Applicant Profile page:

Navigate to the APPLICANT PROFILE > STATUSES tab.

1. Click the applicant's status in the **Current Status** field on the Summary tab.

2. Change the status to the applicable background check status. This enables a background check to be assigned to a candidate on the Statuses tab.
3. Click the Statuses tab.
4. Click the **Assign to Applicant** link in the background check status section. This opens the Select Provider pop-up.
5. Select the Universal Background Screening provider from the **Select Provider** drop-down.
6. Click **SUBMIT**. This opens the log-in page for Universal Background Screening.
7. Log in to the Universal Background Screening site. The page will show the applicant's data passed to Universal Background Screening. The recruiter can enter additional required fields not passed as part of the integration, or the recruiter can select to assign this task to the candidate by selecting Background Check via e-Forms Invitation. If the latter, Universal Background Screening will send an email to the applicant.

If the screening request is successful and completed, the results display in the status panel on the Applicant Profile page. You can also view the results from the associated assessment column on the **Manage Applicants** page.

Custom Recruiting Reports

The Universal Background Screening can be reported on in Custom Recruiting Reports. The following fields provide data for the screenings:

- Assigned Date
- Completed Date
- External Vendor Name
- External Vendor Package Result
- External Vendor Package Title
- External Vendor Product

1 December Patch Release Functionality

What's New for the 1 December 2017 Patch Release

The following is released along with the 1 December 2017 patch release:

MODULE	FEATURE	DESCRIPTION
Core	**Requisition Custom Field Optimization**	Prior to this enhancement, the value for Requisition (Organizational Unit) custom fields that are configured as a Radio Button or Dropdown field type had to be entered manually on the Field Filters tab. With this enhancement, the option for entering a value has been removed. Now, the options that were configured for the custom field appear as a drop-down. The values must be selected from the drop-down. **Note:** *This feature is part of the October '17 release and was* ***initially announced on 14 October 2017 as an update to the release notes****.*
Edge	ADP Workforce Now (WFN) - Marketplace Subscriptions	This enhancement has been removed from the December 1 patch release. It is currently scheduled for the February 2018 release.
Recruiting/Edge/Onboarding	ADP Workforce Now (WFN) - New Hire Integration - Migration to Edge	This enhancement has been removed from the December 1 patch release. It is currently scheduled for the February 2018 release.

15 December Patch Release Functionality

What's New for the 15 December 2017 Patch Release

The following is released along with the 15 December 2017 patch release:

MODULE	FEATURE	DESCRIPTION
Cornerstone HR/Succession/View	**Org Chart - Export to PDF**	With this enhancement, data on the People tab of the Org Chart page can now be exported to PDF. An **Export Org Chart** option has been added to the **Options** drop-down on the Org Chart page to allow users to export the chart data, user images, and organizational layout.

Org Chart - Export to PDF

With this enhancement, data on the People tab of the Org Chart page can now be exported to PDF. An **Export Org Chart** option has been added to the **Options** drop-down on the Org Chart page to allow users to export the chart data, user images, and organizational layout.

Use Case

John is the Operations Manager at Acme Inc. He is meeting with the engineering team this morning to start work on a cross functional project. As part of the kick off meeting, John wants to give the engineering team an overview of his team's reporting structure. Using the export feature of the Org Chart, he is able to create a PDF that can be shared, printed, or embedded into a presentation.

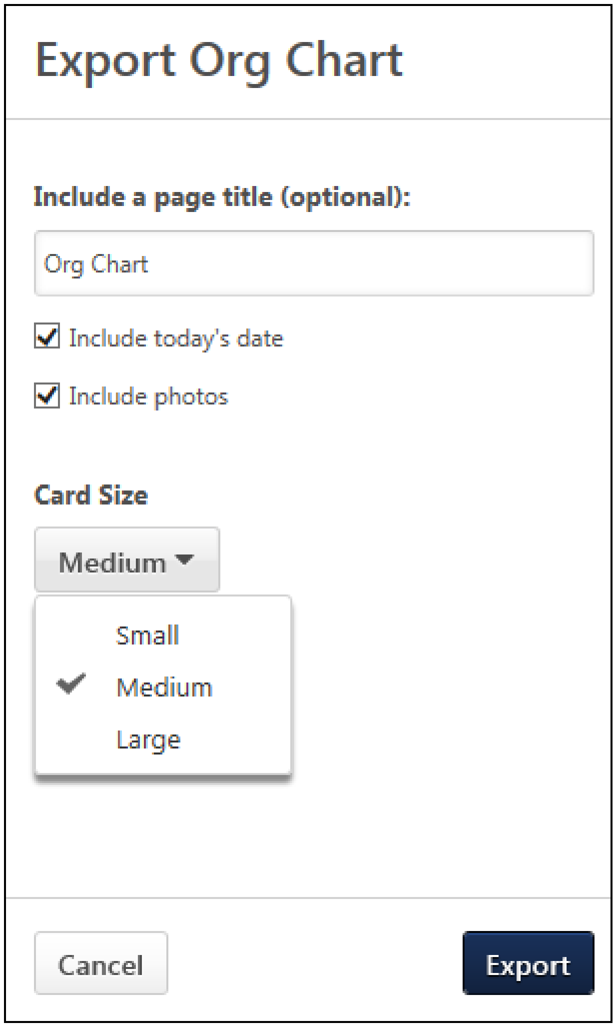
To access the Org Chart page, select the org chart option from the navigation tab. The navigation tab location of the Org Chart page will differ depending on where the administrator configured the page to appear in the portal.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Org Chart - View	Grants access to the new Org Chart page for organizations with Cornerstone HR, Succession, or View. This permission can be constrained by OU, User’s OU, Users, User’s Self, User Self and Subordinates, User’s Manager, User’s Superiors, Employee Relationship, User’s Direct Subordinates, User's Subordinates.	Core
Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

Export Org Chart

The **Export Org Chart** option appears in the **Options** drop-down. Clicking the option opens the Export Org Chart flyout, from which you can choose the following data that will appear on the PDF:



- **Page Title** - Enter a title that will appear on the PDF, up to 50 characters. The default title is the name of the portal from which the org chart is exported.
- **Include Today's Date** - This option is selected by default. When selected, the date appears below the title.
- **Include Photos** - This option is selected by default. When selected, the user's photo appears on the user card. If an image is not available for a user, then a blank image appears.
- **Card Size** - You can select the size of the user card that will appear on the PDF. The card size determines which information is in the card.
  - Small - This option displays the user's photo, name, and organizational units (OU) 1 and 2. However, the data does not wrap. If the user's information is longer than the space allows, the full data will not be visible in the card on the PDF.
  - Medium - This option displays the user's photo, name, and organizational units (OU) 1 and 2. The data in the card does wrap, making the information fully visible.
  - Large - This option shows up to five user details that are configured by the administrator in **Org Chart Preferences**. The details may include performance review rating and OU, Succession, and Compensation data.

Click **EXPORT** to export the org chart to Excel.

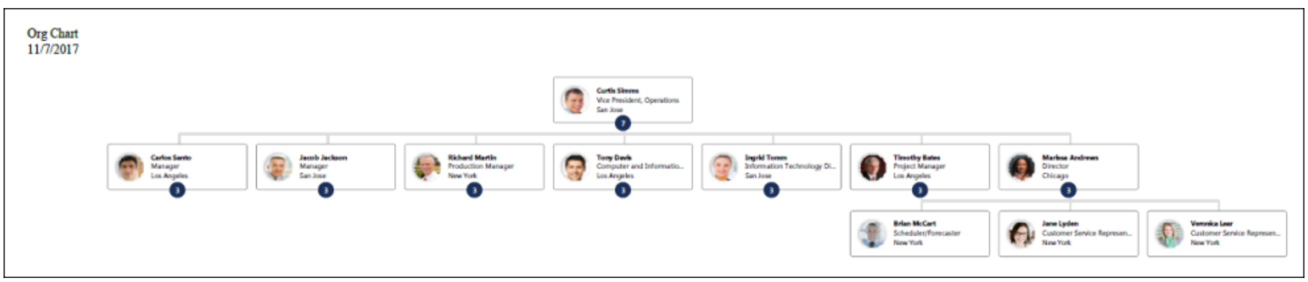
- A hierarchy of up to 150 cards can be exported. If the hierarchy is too large to export, then an error message displays, indicating that the hierarchy must be smaller.
- Only one org chart can be exported at a time.
- The Export Org Chart flyout remains open while the PDF is generated. If you refresh the page or navigate away, you must re-start the download.
- The name of the org chart PDF file will be: OrgChart_Date. If you download multiple copies, the copy number displays in parentheses after the name.
- When printing the PDF, you may have a feature that allows you to print across pages by creating a poster version of the org chart. This will create a single printed page by combining the pages in the chart. This can be helpful when printing large org charts.

PDF Output

The PDF output will appear the same as the user cards appear on the Org Chart page. If you included the date and photos, then the date appears below the title, and the photos appear in the user card for each user.

Inactivated user cards will appear on the PDF and will include the information icon that indicates a user is in an inactivated status (inactive, on leave, or no longer with the organization).

The following is the output for the small card size:



Core

Akamai Video Player Upgrade

Prior to this enhancement, the system utilized a version of Akamai Video Player that is no longer supported by Akamai.

With this enhancement, the system's Akamai Video Player is updated to improve performance and better align with industry trends.

The following functionality is updated with the new Akamai Video Player:

- The video player utilizes HTML5 by default, rather than Flash.
- The ability to download the video is removed when the video player utilizes HTML5.
- If a user is on a slow network, the video automatically buffers and the quality is improved.

Considerations

See the MP4 Video Additional Configuration *section below for additional configuration requirements for organizations using mp4 videos.*

The following Internet browser considerations determine the default format:

BROWSER	OPERATING SYSTEM	DEFAULT FORMAT
Firefox (version 42 and above)	Any	HTML5 (HLS version)
Chrome (versions from 2013 and newer)	Any	HTML5 (HLS version)
Internet Explorer (IE) 11	Windows 8 and above	HTML5 (HLS version)
IE 11	Windows 7	Flash; if Flash is disabled, then HTML5 (mp4).
IE 10	Any	Flash; if Flash is disabled, then the video player is not supported. This is existing behavior due to the limitations of the browser.
Edge	Windows 10	HTML5 (HLS version)
Safari	Mac	HTML5 (HLS version)

Implementation

This functionality is automatically enabled for all organizations. The Akamai Video Player is utilized within the Performance (observation checklists), Learning (video learning objects, video questions, cohorts, and curriculum player), and Connect (Live Feed and communities) functionalities.

MP4 Video Additional Configuration

As of November 14, 2017, organizations that have or will upload mp4 videos in their portals must perform additional configurations in order to ensure that mp4 videos play properly. Following the November 14 patch, low-bitrate, high-resolution mp4 videos are played in the mp4 player only with no streaming rather than in the default HLS player with streaming.

Regardless of operating system, the following four URLs should be added to the Trusted Sites for IE, Chrome, and Firefox for organizations using mp4 videos:

- https://csod-a.akamaihd.net
- https://csod-vh.akamaihd.net
- https://csoduk-vh.akamaihd.net
- https://csoduk-a.akamaihd.net

For Internet Explorer:

- Add the four URLs via Internet Options > Trusted Sites.

For Chrome browsers:

- If the **Block third-party cookies** setting is disabled, no additional action is needed.
- If the **Block third-party cookies** setting is enabled, add the four URLs in the *Allow* section.

For Firefox browsers:

1. Select the **Accept cookies from sites** checkbox.
2. Select the **EXCEPTIONS** button and add the four URLs.

Data Load Wizard Enhancements

In order to support the User Record - New Fields enhancement, two new fields are added for User data loads:

- Personal Email - This field stores the user's personal email address that is not a company-provided email address. This field is optional and is a text field. This value should be unique. This field is available for Cornerstone HR and non-Cornerstone HR User loads.
- Rehired Employee - This field indicates whether the user was previously with the company and rehired. This field should only be provided when the user's User Type is set to Employee, Contractor, Intern, or Temporary. This field is optional and accepts Yes, No, Y, or N. This field is only available for non-Cornerstone HR User loads.

In addition, when uploading the Reason for Change values, Termination and Rehire are now accepted values as long as they are active reasons for change within the system.

Implementation

This functionality is automatically enabled.

- Personal Email - This field is available for Cornerstone HR and non-Cornerstone HR User loads.
- Rehired Employee - This field is only available for non-Cornerstone HR User loads.

The ability to upload Reason for Change values is only available for Cornerstone HR User loads.

Security

The following existing permission applies to this functionality:

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

End of IE9 Support

In order to keep up with browser security requirements and the latest software enhancements, Cornerstone is discontinuing 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 the release.

KR Currency Symbol Update

The existing "KR" currency symbol is replaced with the local currency symbol for the following currencies:

- Danish: KR is changed to DKK
- Swedish: KR is changed to SEK
- Norwegian: KR is changed to NOK
- Estonian: KR is changed to EEK

Implementation

This functionality is automatically enabled for all organizations, and this update impacts organizations using Swedish, Danish, Norwegian, and Estonian language packs or when these currencies are in use.

User Record - New Fields

User Record - New Fields Overview

New fields are added to the User Record page, including personal email, rehired employee, and new reasons for change. These fields allow for a standardized rehire process, which is part of a related enhancement for the October '17 release. *See* **Rehires Enhancement Overview** *on* page 292 *for additional information.*

With more fields supporting a standardized rehire workflow, you can increase the traceability of changes to employee data, report accurately the number of rehired employees within the organization, and capture more contact information related to a user's personal data.

Implementation

The **Personal Email Address** field will automatically appear for all portals.

The **Rehired Employee** field is part of the User Type and Employment Status section of the user record. This field will automatically appear upon implementation of this enhancement only if this section is already enabled.

The ability to define new reasons for change is automatically enabled for all portals using Cornerstone HR.

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - Edit Personal Email Address	Enables administrator to edit the Personal Email Address for a user via the admin/users screen. This permission cannot be constrained. This is an administrator permission. By default, this permission is included in the System Administrator security role and parent roles of System Administrator.	Core Administration
Users - View Personal Email Address	Enables administrator to view the Personal Email Address for a user via the admin/users screen. This permission cannot be constrained. This is an administrator permission. By default, this permission is included in the System Administrator security role and parent roles of System Administrator.	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Preferences - Reasons for	Grants ability to define and configure Reasons for Change on the User Preferences administrator page,	Core Administration

Change: Manage	which may be used when modifying the user record. The administrator must also have the User Preferences - Core Information: View permission to access the User Preferences page. This permission cannot be constrained. This is an administrator permission.	
Users - Edit Users Type and Status	Enables administrator to view and modify the type and status information for a user via the User Record. This permission only works when used in conjunction with the Users - View permission.	Core Administration
Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

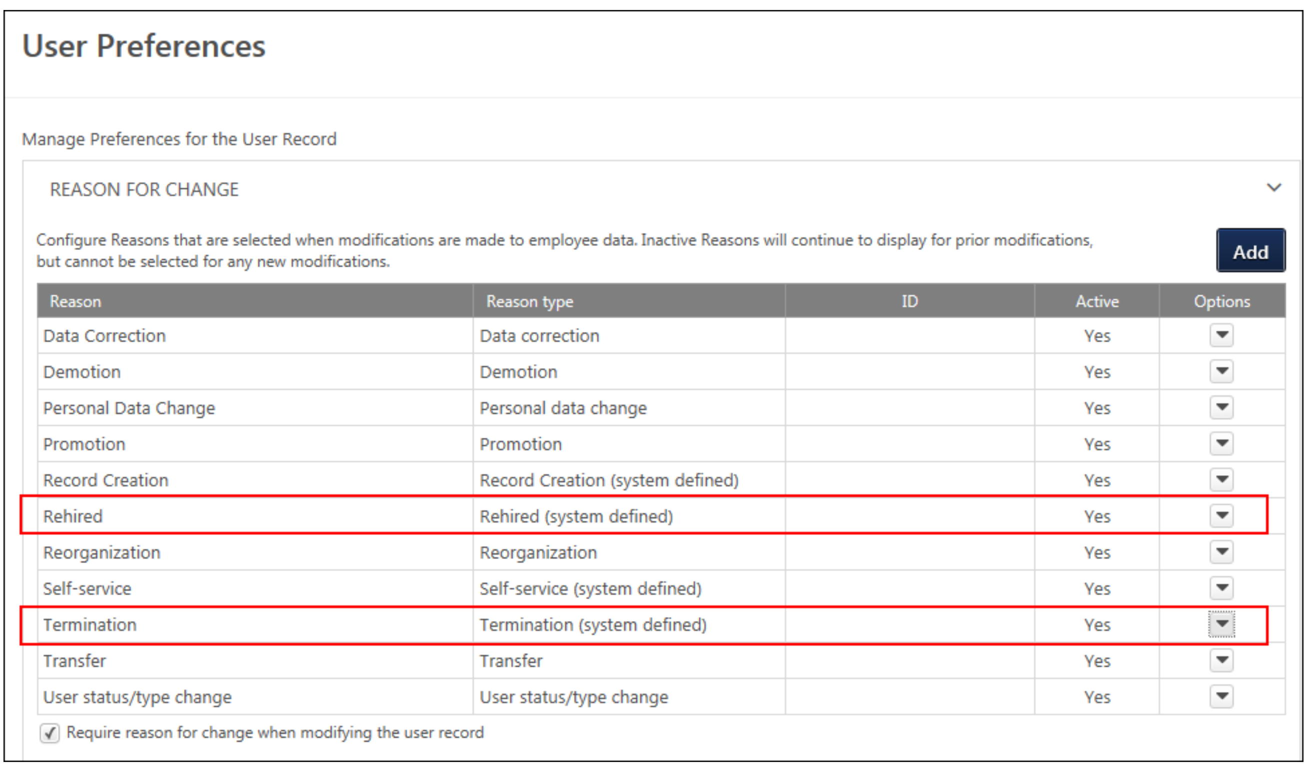
User Preferences

The Reason for Change section on the User Preferences page is updated with new reasons for change: Rehired and Termination.

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

Permissions

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



Reason for Change - Rehired

The Rehired reason for change indicates that the user was previously with the company and has been rehired. This is a default reason that is active by default and cannot be inactivated.

- The name can be modified in the Edit pop-up.
- An ID can be added in the Edit pop-up.
- The reason type is "Rehired" and cannot be modified.
- The "Rehired" reason type cannot be used for other reasons for change.
- The reason cannot be selected in the Edit Record drop-down on the User Record page. The system automatically assigns the reason when an applicant is converted back to an employee after having been terminated.

Reason for Change - Termination

The Termination reason for change indicates that a user is no longer with the company because their employment has been terminated. This is a default reason that is active by default and cannot be inactivated.

- The name can be modified in the Edit pop-up.
- An ID can be added in the Edit pop-up.
- The reason type is "Termination" and cannot be modified.
- The "Termination" reason type cannot be used for other reasons for change.

User Record

New fields are added to the User Record page, including personal email, rehired employee, and new reasons for change. These fields allow for a standardized rehire process.

*For more information about the Rehires Enhancement, see the **Rehires Enhancement Overview** topic in the What's New > Recruiting section of Online Help.*

A user's record can be viewed in the following manners:

- Go to ADMIN > TOOLS > CORE FUNCTIONS > USERS. Then, select the name of the user in the search results.
- Select the user's photograph from any page within Universal Profile or from Global Search. Then, select the User Record tab.

Permissions

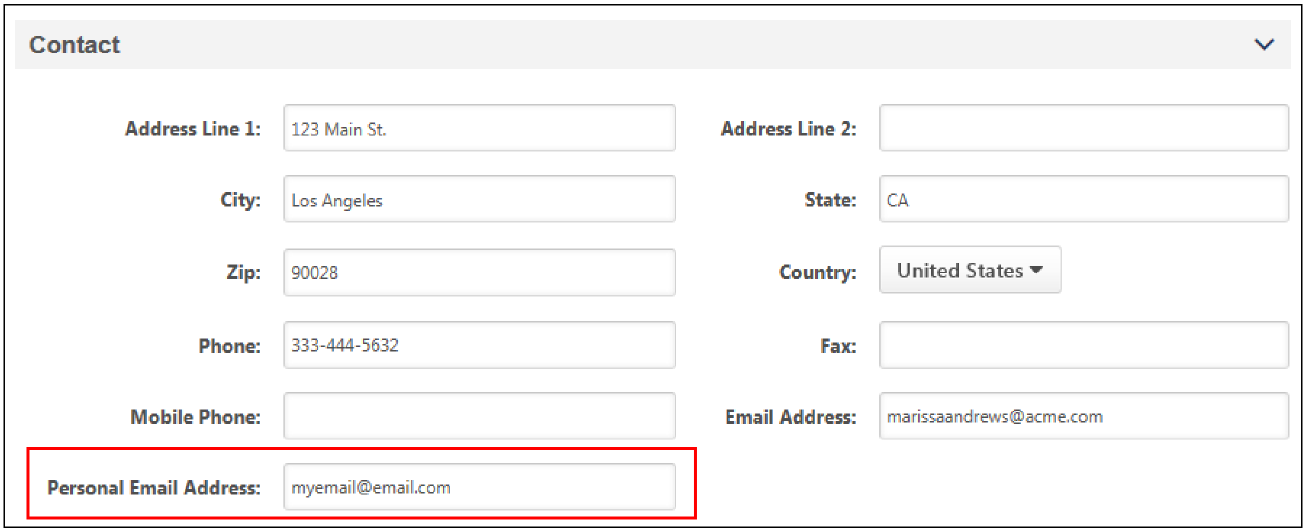
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - Edit Personal Email Address	Enables administrator to edit the Personal Email Address for a user via the admin/users screen. This permission cannot be constrained. This is an administrator permission. By default, this permission is included in the System Administrator security role and parent roles of System Administrator.	Core Administration
Users - Edit Users Type and Status	Enables administrator to view and modify the type and status information for a user via the User Record. This permission only works when used in conjunction with the Users - View permission.	Core Administration
Users - View Personal Email Address	Enables administrator to view the Personal Email Address for a user via the admin/users screen. This permission cannot be constrained. This is an administrator permission. By default, this permission is included in the System Administrator security role and parent roles of System Administrator.	Core Administration
Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

Personal Email Address

The **Personal Email Address** field is added to the Contact section. The field accepts up to 128 characters, and the value must be a unique email address in the system.

This field allows organizations to capture a secondary email address for employees, aside from their company email address. The field is also used to identify past employees reapplying to an organization as part of the standardized rehire workflow.

For more information about the rehire process, ***see the Rehires Enhancement as part of the October '17 release****.*



Rehired Employee

The **Rehired Employee** field is added to the User Type and Employment Status section. This field is an employment status that indicates whether or not the user was previously with the company and has been rehired. The field only displays when one of the following user types is selected:

- Contractor
- Employee
- Intern
- Temporary

The field is also available for all user subtypes and statuses.

The value in the drop-down is "No" by default. To change the value (i.e., when changing the employment status from Terminated to Working for a former employee who has been rehired), select "Yes" from the drop-down.

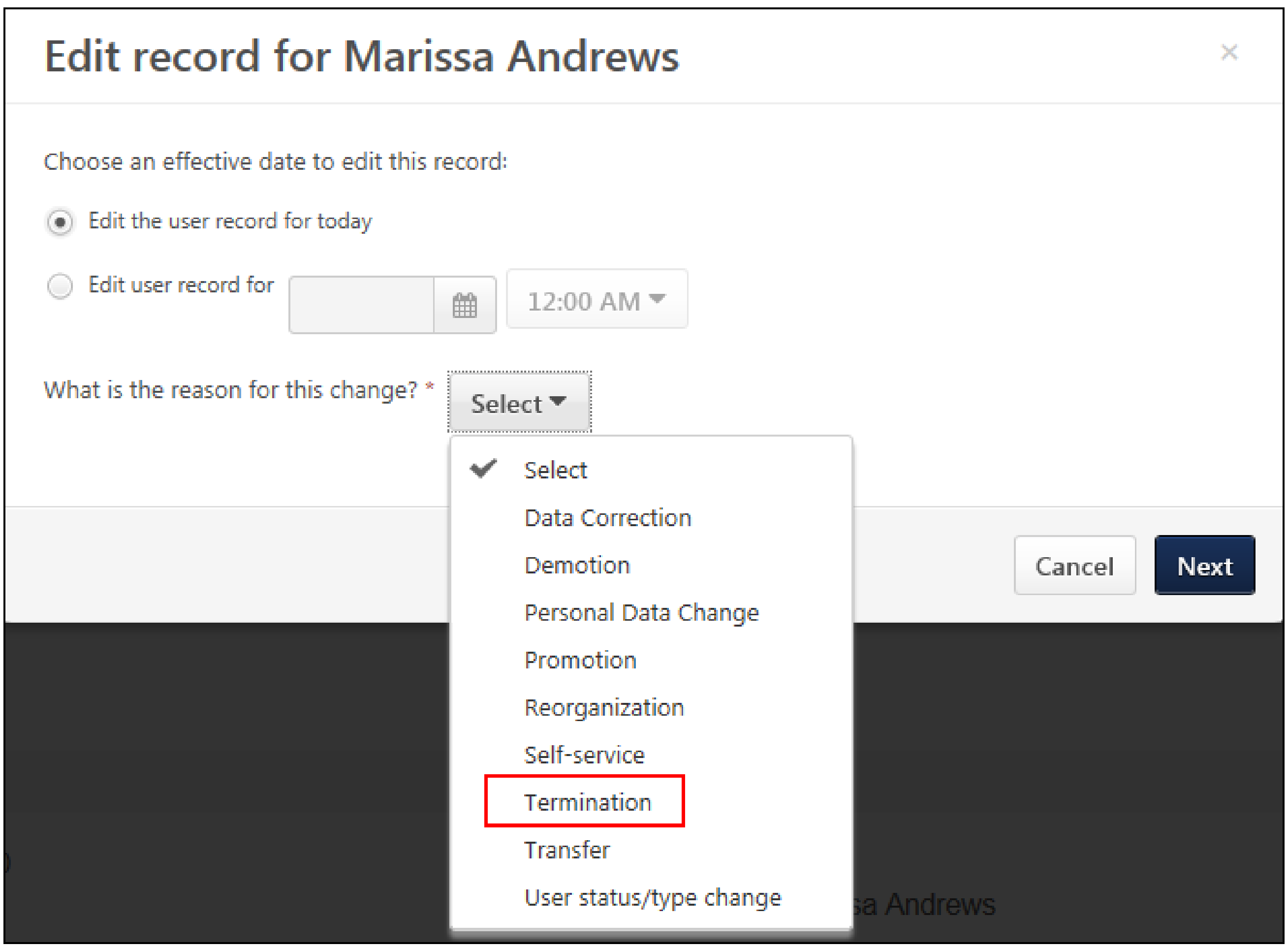
Note: *When first creating a user record, the Rehired Employee field cannot be configured.*

Use Case

Seasonal jobs and organizations with high turnover often see an influx of employees that were previously with the company and seek reemployment. In order to identify these users individually and via reporting, employees can be identified as a rehired employee on the user record.

New Reason for Change - Termination

For portals with Cornerstone HR, a new reason for change called "Termination" has been added as a default reason for change. This option can be selected in the reason for change drop-down to indicate that a user's record is being changed because their employment has been terminated.



Removal of OUs and Employee Relationships

When a terminated employee is rehired, their previous organizational units (OU) and employee relationships are removed. This is done so that their new OUs and relationships can be associated with their user record.

The new OUs and relationships are updated during the onboarding process. This process is outlined in more detail in a related enhancement for the October '17 release. *See* **System Actions for Rehired Employees** *on* page 296 *for additional information.*

Custom Reports - User Record Fields

With this enhancement, the **Personal Email Address** field and the **Rehired Employee** field are available in custom reports.

- **Personal Email Address** - This field is added to the User section. The report displays the user's personal email address, as found in the **Personal Email Address** field on the user record.
- **Rehired Employee** - This field is added to the User Status Information section. The report displays a Yes/No value indicating whether an employee was previously employed at the organization but has been rehired. The value for this report field is pulled from the **Rehired Employee** field on the user record.

The fields are available in the applicable sections of the following custom reports:

- Assignment Report
- Certification Report
- Compensation Report
- Competency Report
- Compliance Report
- Development Plan Report
- Evaluations Report
- Forms Report
- Goals Report
- Multi-Module Report
- Observation Checklist Report
- Onboarding Report
- Performance Report
- Performance Review Report
- Recruiting Report
- Resume Report
- Succession Report
- Test Report
- Training Form Management Report
- Training Forms - Curricula Report
- Training Plan Report
- Transaction Report
- Transcript Report
- User Report

Org Chart - Inactive Cards

Org Chart - Inactive Cards Overview

With this enhancement, the user card for managers who are inactive, on leave, or no longer with the organization can be changed to inactive to indicate the user's status. This helps executives and other managers know when a user is not actively managing their team. This can also act as a reminder that a team will need to be reassigned.

Use Cases

Inactive Manager with Active Subordinates

Alex is a regional sales manager overseeing a team of 5 sales reps. Today is his last day at Acme Inc, and his account will be made inactive before the end of the day. A decision about his replacement has not been made.

When his account is made inactive, his card will be grayed out but remain visible on the org chart. Once his team is reassigned, he will no longer be visible in the org chart. The special formatting of the card makes it easy for administrators and managers above him to keep visibility of his team and serves as a reminder that his team needs to be reassigned.

Active User on Leave

John is a senior manager in Operations and has taken a leave of absence from his job. Because his status remains active, users of the org chart could mistakenly believe he is actively leading his team.

The administrator enables the ghost card feature, which lets viewers of the org chart know that he is on leave and not actively leading his team. If the leave is of an extended nature, John maybe marked Inactive on the user record, and his team may need to be reassigned.

Active User Terminated

Jason is a senior developer at Acme Inc. and has submitted his resignation without giving advanced notice. For Payroll to process correctly, his active status must remain active, but his employment status is changed to Terminated. Because his status remains active, viewers of the org chart could be unable to tell that Jason has left the company.

The administrator enables the ghost card feature. This allows Jason to display on the org chart as a ghost card, which lets viewers of the org chart know that Jason is no longer part of the organization.

Implementation

This functionality is only available for organizations with Cornerstone HR, Succession, or View. The functionality will be automatically enabled in those portals.

Note: *To enable Cornerstone HR, Succession, or View, contact Global Product Support. For more information about these products, contact your Client Success Manager.*

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Org Chart - Preferences	Grants access to the Org Chart Preferences page. This permission cannot be constrained.	Core
Org Chart - View	Grants access to the new Org Chart page for organizations with Cornerstone HR, Succession, or View. This permission can be constrained by OU, User’s OU, Users, User’s Self, User Self and Subordinates, User’s Manager, User’s Superiors, Employee Relationship, User’s Direct Subordinates, User's Subordinates.	Core
Org Chart by Organization - View	Grants access to the Organization tab on the new Org Chart page. This permission cannot be constrained. This permission works in conjunction with the Org Chart - View permission. For users who do not have this permission, the Organization tab will not be available. **Note:** *This permission pertains to the new Org Chart functionality that is released with the February '17 release. The new Org Chart functionality is only available for organizations with Cornerstone HR, Succession, or View.*	Core
Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration

Org Chart Preferences

New fields are added to Org Chart Preferences to enable inactive cards to display for users who are inactive, on leave, or no longer with the organization. Administrators can enable one or more of these settings to manage how the image for these users appears on the Org Chart page. All settings are enabled by default.

To access Org Chart Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Org Chart - Preferences	Grants access to the Org Chart Preferences page. This permission cannot be constrained.	Core

The following new options are available in Org Chart Preferences and are enabled by default:

- **Display Inactive Cards** - This option enables the additional three options below it. When unchecked, the additional options are grayed out and not selectable.
    - **Inactive managers with active subordinates** - This option inactivates the user card for users who are set to "Inactive" on the user record but have direct reports who need to be reassigned.
    - **Active users who are on leave** - This option inactivates the user card for users who are set to "On Leave" on the user record.
    - **Active users whose employment status is "terminated"** - This option inactivates the user card for users who are set to "Terminated" on the user record.
- **Include metrics for inactive cards** - When checked, the large user card and flyout still display metrics (i.e., data for Performance, Succession, etc.) for users whose card is inactive on the org chart. When unchecked, the large user card and flyout do not display metrics for users whose card is inactive.

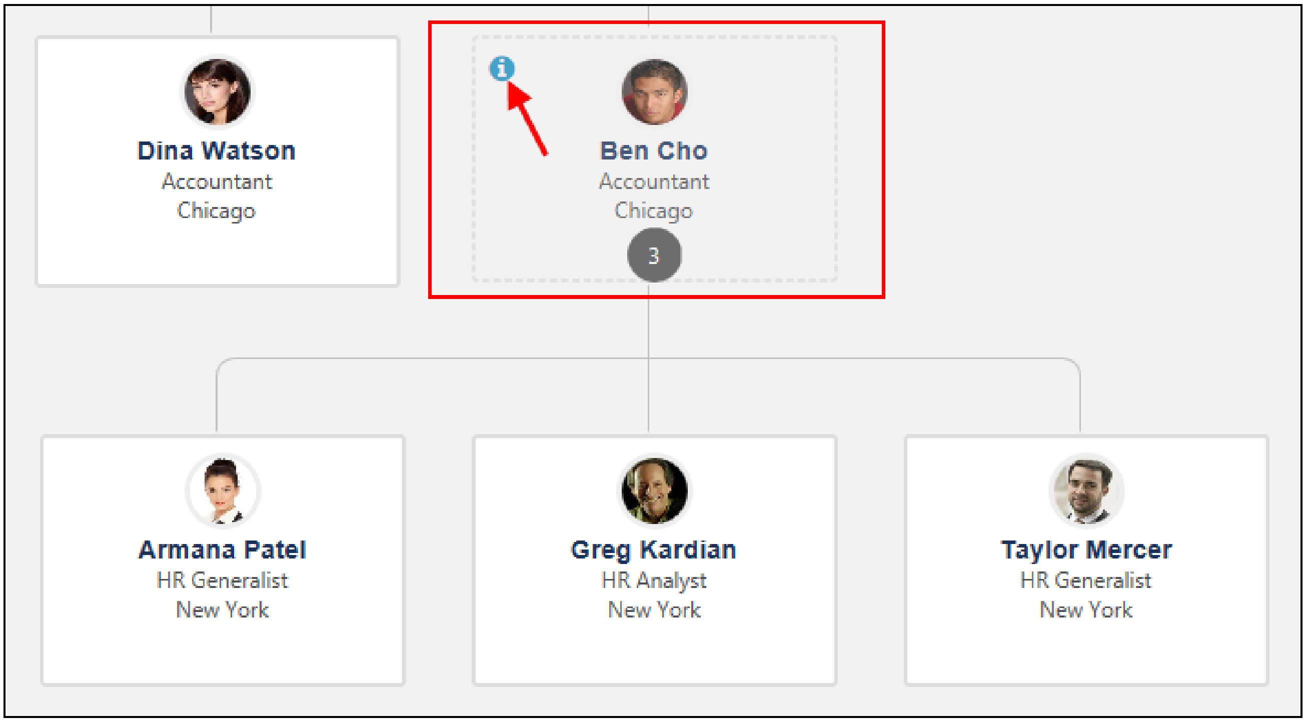
Org Chart Page

With this enhancement, administrators can inactivate user cards on the Org Chart page for users who are inactive, on leave, or no longer with the organization. When inactivated, the user card appears as grayed out. Metrics may still be visible, depending on the administrator's settings in **Org Chart Preferences**.

To access the Org Chart page, select the org chart option from the navigation tab. The navigation tab location of the Org Chart page will differ depending on where the administrator configured the page to appear in the portal.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Org Chart - View	Grants access to the new Org Chart page for organizations with Cornerstone HR, Succession, or View. This permission can be constrained by OU, User's OU, Users, User's Self, User Self and Subordinates, User's Manager, User's Superiors, Employee Relationship, User's Direct Subordinates, User's Subordinates.	Core
Org Chart by Organization - View	Grants access to the Organization tab on the new Org Chart page. This permission cannot be constrained. This permission works in conjunction with the Org Chart - View permission. For users who do not have this permission, the Organization tab will not be available. **Note:** *This permission pertains to the new Org Chart functionality that is released with the February '17 release. The new Org Chart functionality is only available for organizations with Cornerstone HR, Succession, or View.*	Core
Users - View Users Type and Status	Grants ability to view user type and status information on the User Record. This permission cannot be constrained. This permission only works when used in conjunction with the Users - View and Users - Edit permissions.	Core Administration



Inactive User Card

Inactive user cards appear as grayed out on the Org Chart page. The following information is still available in the card:

- Attributes, if configured in Org Chart Preferences.
- The clickable number of direct reports.
- The small/large card toggle still displays both cards.
- The user's name can be selected to open the flyout.

Once the user no longer has active direct reports, the user's card no longer displays.

User Status

An information icon displays in the upper-left corner of the card. For users with permission to view user type and status, clicking or hovering over the icon shows the user's status, such as "On Leave."

The icon also appears on the flyout in the **Employment Status** field.

Visibility of Metrics

The visibility of metrics for inactive user cards (i.e., Performance and Succession data), is controlled by a setting in **Org Chart Preferences**. If the setting is enabled, then metrics display in the large user card and on the flyout. If the setting is disabled, then the metrics do not display.

Batch Edit

Inactive cards are visible when batch editing. However, the cards cannot be selected.

Anonymized Users

For users who have been anonymized, the user card does not display any identifiable information.

Planning Tasks as Actions in Universal Profile

Planning Tasks as Actions in Universal Profile Overview

With this enhancement, Planning tasks now appear in the Actions tab in Universal Profile. Emails are still sent to notify planners about tasks, but planners can now also find their Planning tasks in Universal Profile.

Use Case

Jane is the manager of a medium-sized department in a growing business. She is taking part in the annual headcount plan and entering the headcount needs she forecast for the next two years. She has also assigned subplans to a few of the managers below her so that she can get more accurate forecasts for those specific teams.

Using Universal Profile, she is able to see when her plan is due, and she can keep track of when the subplans are returned to her for her review.

Implementation

For portals using Headcount Planning, this functionality is automatically enabled.

Note: *Headcount Planning is available by request at an additional cost. Contact your Client Executive for additional information.*

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by Employee Relationship, OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile
Work Force Planning - Administrator	Grants access to the Headcount Planning page. Users with this permission can also create new headcount plans for any part of the organization, as well as create subplans that have been assigned to them. Administrators can only view plans that they have created or to which they were assigned as a Co-Planner or Primary Planner. This is an administrator permission.	Core Administration
Work Force Planning - Owner	Grants owner-level access to plans. Users with this permission can view their assigned plans and can create plans. This permission cannot be constrained.	Core Administration
Work Force Planning -	Grants reporting analyst-level access to plans. Users with this permission cannot create plans or edit plan	Core Administration

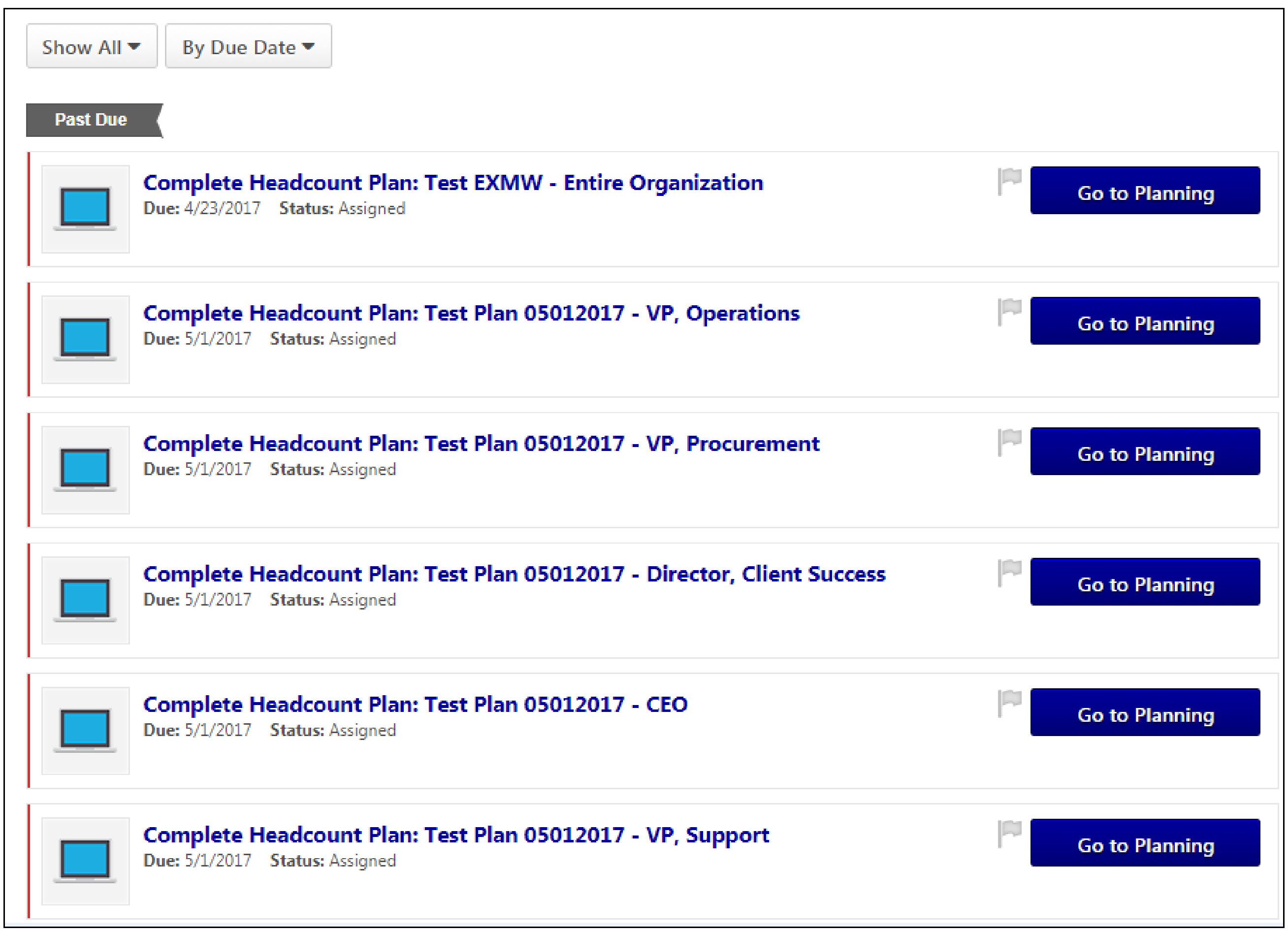
Reporting Analyst	metadata. This permission cannot be constrained.	
Work Force Planning - Subplanner	Grants the ability to complete subplans that have been assigned to the user as a Primary Planner or a Co-Planner. Users with this permission cannot create new headcount plans or view all plans. Within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

Universal Profile - Planning Tasks

With this enhancement, Planning tasks are now available in the Actions tab in Universal Profile. The following types of tasks are added:

- **Complete Headcount Plan [PlanName – AreaName]** - This task appears for any planner user who was assigned a headcount plan, whether as Co-Planner, Primary Planner, or Owner. The status of this task will be Assigned. To access the task, click the **GO TO PLANNING** button, which opens the Planning homepage, not the specific plan that requires action.
- **Review Headcount Plan [PlanName – AreaName]** - This task appears for senior planners that assigned subplans, once the subplanner submitted the subplan to the senior planner. The status of this task will be For Review. To access the task, click the **GO TO PLANNING** button, which opens the Planning homepage, not the specific plan that requires action.

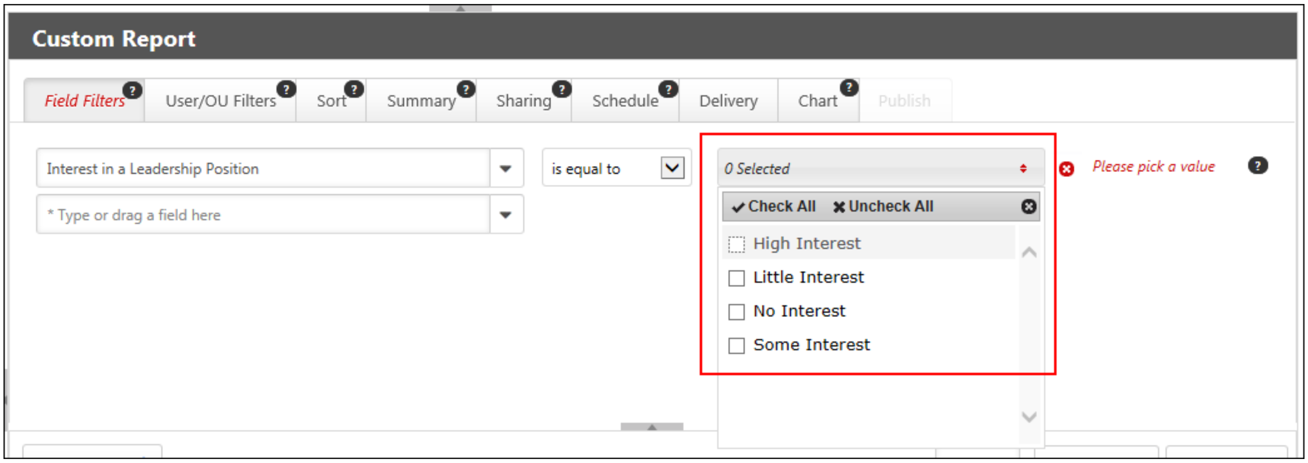
Users cannot change the status of the action in Universal Profile. The action must be completed in Planning, at which point the action is updated to completed.



Requisition Custom Field Optimization

Prior to this enhancement, the value for Requisition (Organizational Unit) custom fields that are configured as a Radio Button or Dropdown field type had to be entered manually on the Field Filters tab.

With this enhancement, the option for entering a value has been removed. Now, the options that were configured for the custom field appear as a drop-down. The values must be selected from the drop-down.



Impact to Existing Custom Reports

If you notice that a Recruiting or Multi Module Custom Report is no longer refreshing after implementation of this enhancement, you will need to update the values of the Radio Button or Dropdown type Requisition custom fields.

The inability for the report to automatically refresh happens because one of the following occurred in the report:

- The text box selection was not valid.
- The text box selection did not match a valid choice in the Radio Button or Dropdown custom field.

These issues can occur if the options in the custom field drop-down have changed over time.

Responsive Universal Profile Enhancements

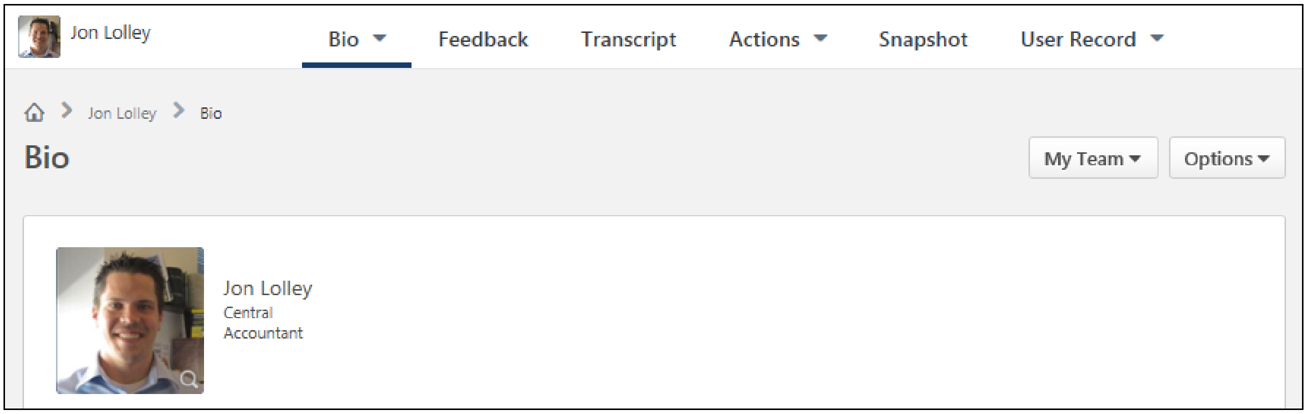
Responsive Universal Profile Enhancements

With this enhancement, the My Team functionality, Options button, and the breadcrumbs within the Universal Profile are redesigned. These items are now more responsive and easier to use on a mobile device. In addition, the navigation controls within the Universal Profile are improved to increase usability on smaller devices.

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
	Leaderboard
	Succession
Transcript	Transcript
User Record	User Record

Universal Profile - Previous Design



Universal Profile - New Design

View Team Menu

Prior to this enhancement, the **MY TEAM** drop-down menu on the Universal Profile was not responsive, and consumed a lot of space on the screen when viewed on a smaller device. With this enhancement, the **MY TEAM** drop-down menu is now a **VIEW TEAM** button on the Universal Profile and is responsive and becomes smaller when viewed on a smaller screen so that it consumes less screen space.

Prior to this enhancement, when the **MY TEAM** drop-down menu was selected, a drop-down appeared, which enabled managers, approvers, and custom relationships to quickly navigate between direct reports and dotted-line reports. With this enhancement, when the **VIEW TEAM** button is selected, a new View Team flyout opens on the left side of the screen. This enables the View Team functionality to be effectively utilized on devices with smaller screens.

See **Responsive Universal Profile - View Team Flyout** *on* page 88 *for additional information.*

Options Drop-down Menu

Prior to this enhancement, the **OPTIONS** button on the Universal Profile was not responsive, and consumed a lot of space on the screen when viewed on a smaller device.

With this enhancement, the **OPTIONS** button on the Universal Profile is now smaller and responsive when viewed on a smaller screen so that it consumes less screen space. Regardless of screen size, the button text is changed from "Options" to an ellipse.

When this button is selected, the drop-down menu functionality is unchanged.

Breadcrumbs

Prior to this enhancement, when the Universal Profile was viewed on a smaller device, the breadcrumb text would wrap to multiple lines. With this enhancement, when the Universal Profile is viewed on a smaller device, an ellipse is displayed in the breadcrumbs if the breadcrumb text extends beyond a single line of text.

A maximum of three items appear in the breadcrumbs. If there are more than three items in the breadcrumbs, then the first page in the breadcrumbs and the final two pages in the breadcrumbs are displayed. An ellipse is displayed where the extra items are hidden.

Navigation Controls

Prior to this enhancement, when the Universal Profile was viewed on a smaller device and some navigation options could not be viewed, the user could scroll the navigation options to the left or the right using two arrow buttons. With this enhancement, that functionality remains. However, if the browser window is smaller than 480 pixels wide, then the entire Universal Profile navigation is hidden and it is replaced by a drop-down arrow. Users can select this arrow to view the navigation options.

See **Responsive Universal Profile - Navigation Tabs** *on* page 93 *for additional information.*

Considerations

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

Next to the **VIEW TEAM** and **OPTIONS** buttons, some Universal Profile pages may include another primary action button. For example, there may be a **CREATE** button on the Snapshot > Goals page to allow users to create a goal. Such buttons are not impacted by this enhancement. As a result, these buttons are not responsive.

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.

Responsive Universal Profile - View Team Flyout

With this enhancement, the **MY TEAM** drop-down menu is now a **VIEW TEAM** button on the Universal Profile and is responsive and becomes smaller when viewed on a smaller screen so that it consumes less screen space. When the **VIEW TEAM** button is selected, a new View Team flyout opens on the left side of the screen. This enables the View Team functionality to be effectively utilized on devices with smaller screens.

To access the View Team flyout, select the **VIEW TEAM** button on any Universal Profile page.

View Team Button

The **VIEW TEAM** button may be available to managers, approvers, and custom relationships on all pages of their Universal Profile and the Universal Profile of their direct or dotted-line reports. The button appears to the left of the **OPTIONS** button and is only available if the user who is logged in to the system has direct or dotted-line reports and has permission to view the Universal Profile of their direct reports.

View Team Flyout

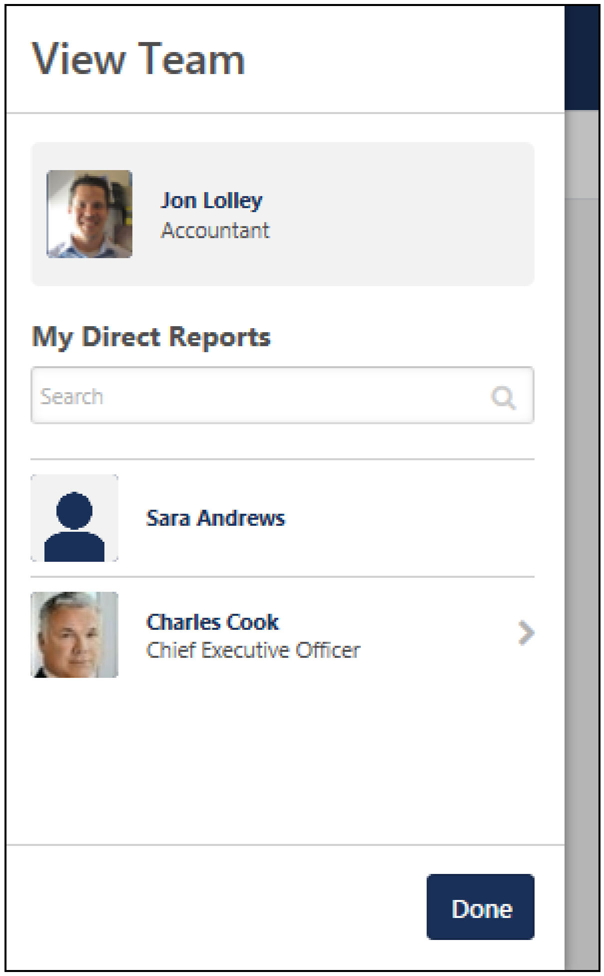
When a manager selects the **VIEW TEAM** button, the manager and the manager's reports are displayed within the flyout. The manager is displayed at the top of the flyout, and the manager's reports are displayed in alphabetical order by last name.

If the manager has more reports that cannot be displayed on the page, then pagination options are available at the bottom of the drop-down. *See the Search and the Pagination sections below for additional information.*

For each user in the flyout, their user photo, full name, and position are displayed. If a direct or indirect report also has direct reports, an arrow icon > is displayed to the right of the user's information. To view the user's direct reports, select the arrow icon. *See the View Indirect Reports section below for additional information.*

Managers can select the user's name or photo to view the corresponding user's Universal Profile as long as the manager has permission to view the direct report's Universal Profile. *See the Select Report section below for additional information.*

To close the View Team flyout, select the **DONE** button.

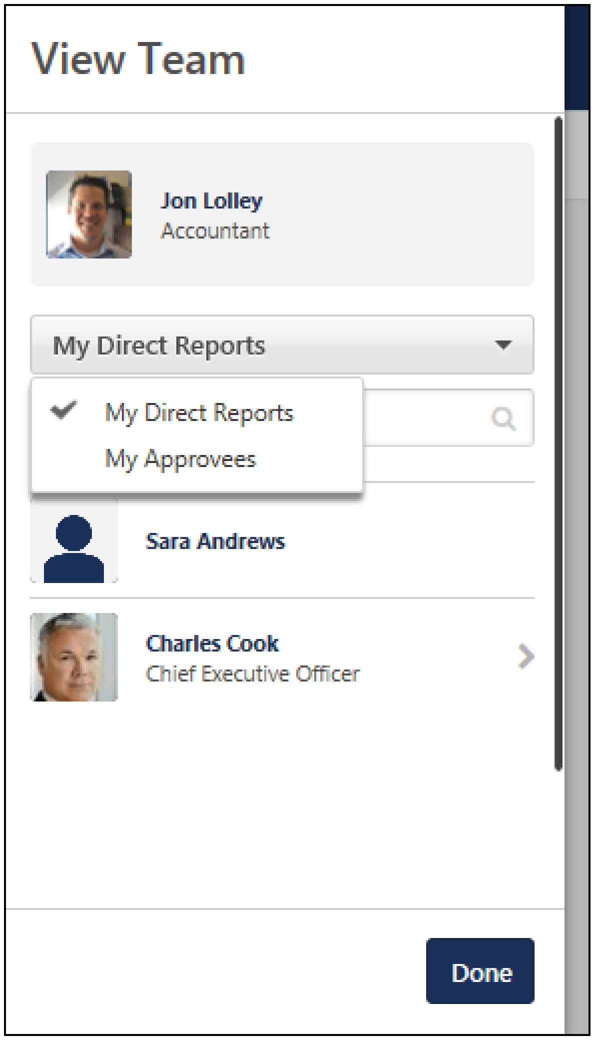


Change Role

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

To select a different set of direct reports, select the **My Direct Reports** drop-down menu within the flyout and select the appropriate role. The flyout displays only the reports that are associated with the selected role. If only one role is available, then the drop-down menu is not available.

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



View Indirect Reports

When a manager views the View Team flyout, the manager and the manager's direct reports are displayed within the flyout.

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

To return to the previous view, within the flyout, select the **Return to User** link at the top of the flyout. This link displays the name of the direct manager of the manager whose team is currently displayed in the flyout.

The selected view is maintained in the flyout as long as the manager remains on the current user's Universal Profile or navigates to another user's Universal Profile using the View Team flyout.

Select Report

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

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

1. If the manager was attempting to navigate to a sub-page (e.g., Snapshot - Goals, Bio - Resume), then the manager is navigated to the corresponding main page (e.g., Snapshot, Bio - About), provided that the manager has access to that page for the user.
2. If the manager was attempting to navigate to a main page (e.g., Snapshot, Actions), then the manager is navigated to the default Universal Profile page.
3. If the manager does not have permission to view a direct report's Universal Profile, then the user's photograph and name are not linked.

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

Search

A Search field is available at the top of the flyout. The search functionality enables the manager to quickly search and locate the appropriate user.

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

Managers can search for a report by first name, last name, first and last name, position, position and first or last name, Username, or User ID.

The search is performed when the manager presses the [Enter] key or clicks the Search icon within the **Search** field. The search results are sorted alphabetically by last name. If the search returns more reports than can be displayed on the page, then pagination options are available at the bottom of the flyout.

The search results are maintained in the drop-down as long as the manager remains on the current user's Universal Profile or navigates to another user's Universal Profile using the View Team flyout.

Pagination

If the manager has more reports than can be displayed on the page, then pagination options are available at the bottom of the flyout. The pagination options enable the manager to quickly browse for and locate the appropriate user.

Managers can select a page number to go directly to that page of reports. The manager appears at the top of the flyout menu on all pages. If there are more than five pages, then a Previous Page and a Next Page icon are displayed with the paging controls to allow the manager to navigate to the previous or next page.

The text below the paging controls displays the count of the reports being displayed and the total number of reports.

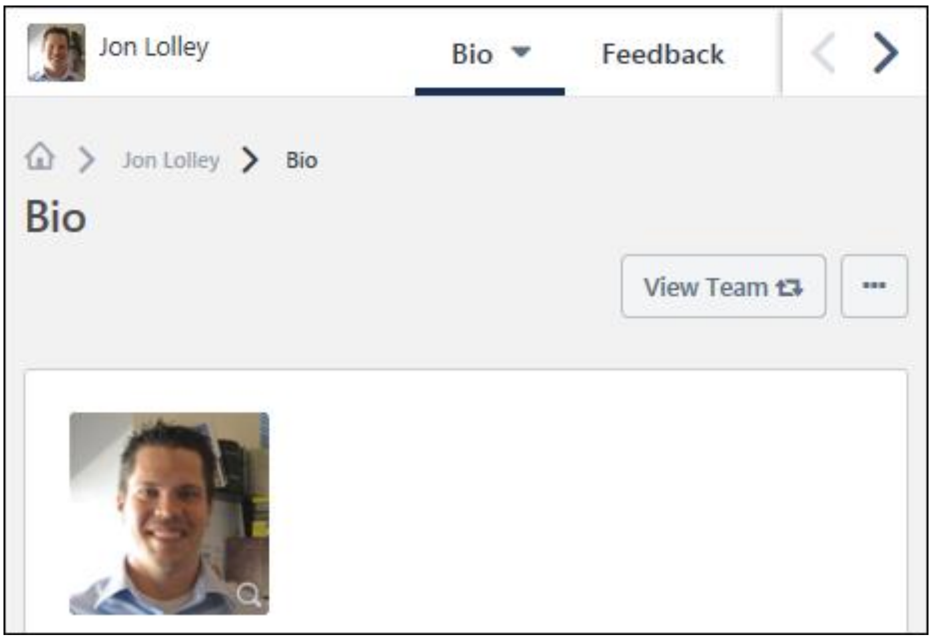
The selected page is maintained in the flyout as long as the manager remains on the current user's Universal Profile or navigates to another user's Universal Profile using the View Team flyout.

Responsive Universal Profile - Navigation Tabs

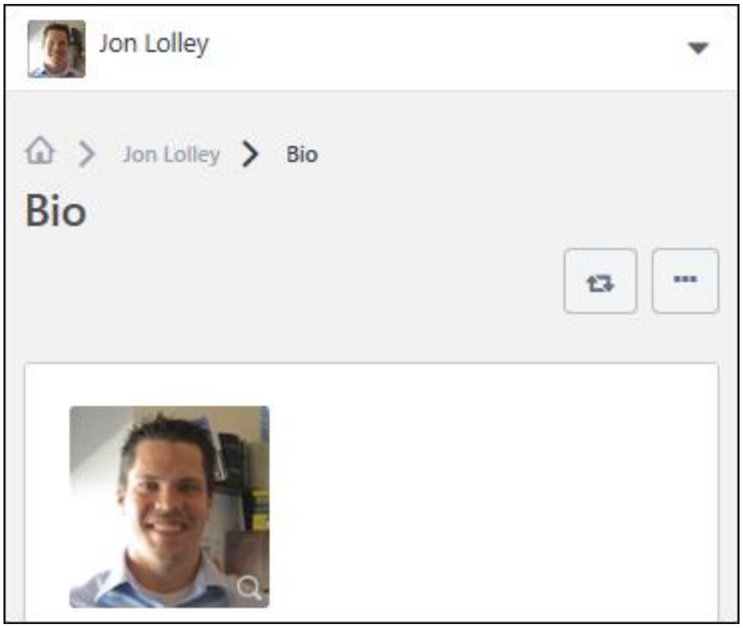
Prior to this enhancement, when the Universal Profile was viewed on a smaller device and some navigation options could not be viewed, the user scroll the navigation options to the left or the right using two arrow buttons.

With this enhancement, that functionality remains. However, if the browser window is smaller than 480 pixels wide, then the entire Universal Profile navigation is hidden and it is replaced by a drop-down arrow. Users can select this arrow to view the navigation options.

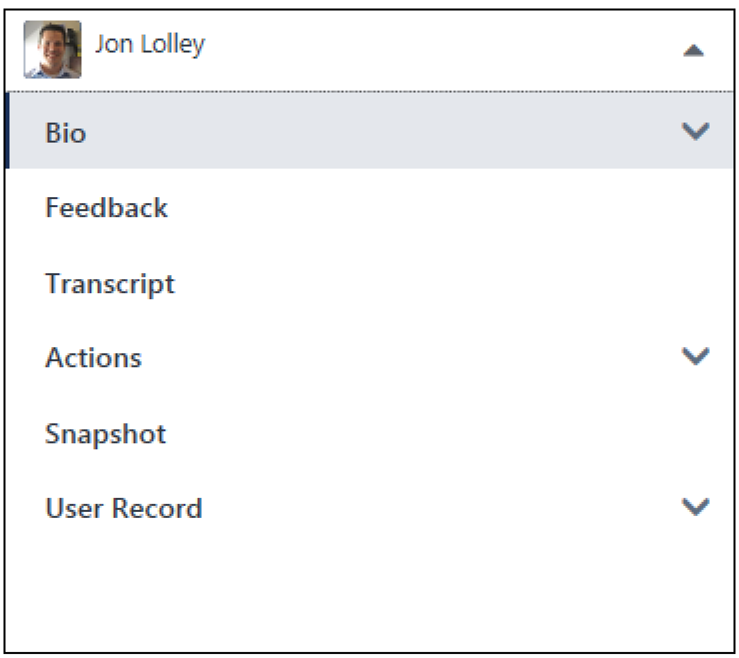
Universal Profile Navigation - Scrolling Arrows



Universal Profile Navigation - Drop-down Arrow



Universal Profile Navigation - Drop-down Arrow Expanded



View People - Increase Filter Max Capacity

With this enhancement, the number of filters that can be added to View People Preferences has increased as follows:

Organization Filters

- Organizational Unit Type Filters - Increased from 7 to 15.
- Organizational Unit Custom Field Filters - Increased from 5 to 10.

Performance Filters

Increased from 5 to 15.

Attribute Filters

- Resume Attribute Filters - Increased from 5 to 10.
- Career Preferences Attribute Filters - Increased from 5 to 10.
- User Record Custom Field Attribute Filters - Increased from 5 to 10.

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 Preferences Page	Grants access to the View People Preferences page, which allows administrators to configure the View People page according to their needs per organizational unit (OU). This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View
View People: View	Grants access to open View People to see results and share lists. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, and User's Subordinates.	View

Cornerstone HR

Forms - Auto-Fill Checked by Default

Forms - Auto-Fill Checked by Default

With this enhancement, the **Auto-Fill Response** setting is now selected by default when adding fields to a form, saving administrators time during the process of creating a new form or editing an unpublished form. This enhancement applies to all fields where **Auto-Fill Response** is an option.

Implementation

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

Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Forms - Manage	Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of Cornerstone HR functionality and the Onboarding module. This permission does not grant access to the Training Forms Management functionality.*	Forms Management Administration

Form - Create - Build Tab - Auto-Fill Response

When building a form, the **Auto-Fill Response** setting is now selected by default when adding fields to a form. This applies to all fields where **Auto-Fill Response** is an option. Administrators can modify the field settings to change the **Auto-Fill Response** setting.

An informative message is displayed to inform administrators of this behavior.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Forms - Manage	Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. **Note:** *This permission enables access to the Form Management functionality that is part of Cornerstone HR functionality and the Onboarding module. This permission does not grant access to the Training Forms Management functionality.*	Forms Management Administration

Edge

Recruiting Integration Connectors

Recruiting Integration Connectors - Overview

Prior to this enhancement, when an organization wanted to use a specific vendor for conducting pre-hire background checks or assessments, Cornerstone's internal application development or GTS teams built the necessary end-to-end integration.

With this enhancement, integration specifications are exposed as "connectors" within API Explorer under Edge Develop. In addition, a code repository is available for developers, allowing them to quickly begin creating their portion of new integrations. These enhancements allow organizations to integrate with any background check or assessment vendor as long as they adhere to the workflow and specifications required by the Edge platform.

Implementation

This functionality is automatically available for all portals using the Edge module. In order to use this functionality, the Recruiting module must also be enabled in the portal.

Permissions

The following existing permissions apply to this functionality:

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

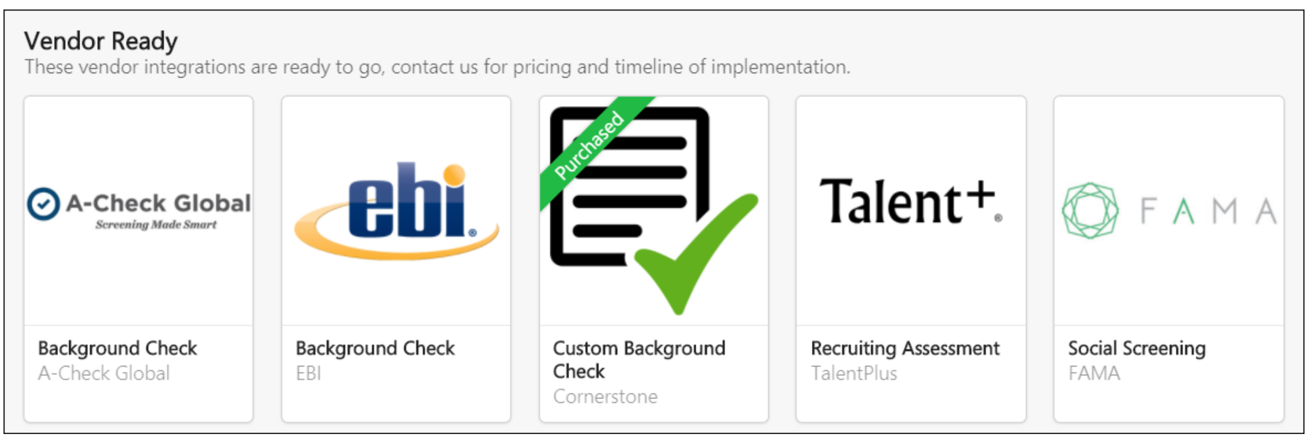
Create Connection

System administrators can work with third party developers to connect background check and assessment APIs to the Cornerstone system using Recruiting integration connectors.

To configure a connector, go to ADMIN > TOOLS > EDGE and click the **Marketplace** link.

Permissions

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



Integration Connection

After navigating to the Edge Marketplace, to easily connect with a third party integration that has been developed by your organization, a partner, or a vendor:

1. Select the relevant background check or assessment connector from the Vendor Ready section of the Edge Marketplace.
2. If desired, examine the connector's tabs and information to learn more.
3. Click the **CREATE CONNECTION** button. You will be navigated to the integration's setup page in Edge Integrations.

4. Populate the vendor details fields with information provided by the vendor.
5. Populate integration details with values provided by the development team responsible for creating the integration.

Development Team Responsibilities

The third party integration must be created before system administrators can connect to it through Edge. **Note:** *Integrations can be built by any development team. However, the integration code must be hosted and maintained by the team or organization building the integration. Cornerstone is not be responsible for the integration code developed by outside vendors or third party development teams.*

For complete documentation of Recruiting Integration Connectors, go to EDGE DEVELOP > API EXPLORER > INTEGRATION CONNECTORS

This documentation includes the following resources:

- Overview
- Deep Dive
- Functional Requirements
- Service Requirements
- Technical Specifications
- Testing and Verification
- Sample Code

External development teams can contact the following email address for support: dledgeconnectorsupport@csod.com

REST Services – Format Parameter Deprecation

REST Services – Format Parameter Deprecation

As of the August ’17 Release, to return results in JSON/XML, format types can be specified within the HTTP headers instead of within the path query string. In the February ‘18 Release, the ability to specify the format parameter in the query string will be deprecated. Please be sure to update web service requests to use the Content-Type parameter in the HTTP header before the February ‘18 Release to maintain uninterrupted service.

Code samples for this change are available in the API Explorer section of Edge.

To access these code samples, go to ADMIN > TOOLS > EDGE > API EXPLORER > CORNERSTONE REST SERVICES and select the Request and Response pages.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge - API Explorer	Grants access to the API Explorer, which provides access to help documentation for various API applications.	Edge

Engage

Engage Emails in Email Administration

Engage Emails in Email Administration - Overview

Prior to this enhancement, administrators could send invitation and reminder emails for Engage campaigns via the Engage email service, but options for customization, branding, and general email administration functionality were not available.

With this enhancement, email templates for Engage invitations and reminders are available alongside previously existing core email management templates, allowing administrators to create consistent, localized email templates for Engage system emails, while also supporting campaign customization.

Use Case

Julie, an Engage administrator, is responsible for creating Engage survey campaigns at her organization. When configuring a new campaign, she does not need to write a new invitation email body or copy an existing campaign in order to quickly create an invitation email for the campaign. Engage invitation and reminder emails are automatically based off the Core email templates Julie configured for Engage via the Email Administration page. If Julie wants to customize the email templates for the campaign, she can use the tag for additional instructions to include campaign-specific messaging.

Considerations

- Any Engage emails sent for new campaigns after the October release must be sent via the Core email templates. The Engage product will no longer send invitation or reminder emails if they are not configured from the Email Administration page. These emails must be configured by the administrator. **Note:** *Campaigns created prior to the Oct '17 release are exempted from this rule, and Engage emails are sent for existing campaigns according to the selections made during campaign creation.*
- Administrators cannot view the status or recipients of Engage emails sent prior to the October release.
- It is recommend that you only configure Engage availability via the Engage campaign configuration workflow, and not via Email Administration. Configuring availability from within Email Administration currently results in duplicate email invites and reminders being sent to users.

Implementation

This functionality is automatically enabled for all portals using the Engage module. It is necessary for administrators to configure the Engage email templates via Email Administration in order for Engage invitation or reminder emails to be sent to users. If your organization is not currently using the Engage module, contact Global Product Support for enablement information. For more information about the Engage product, *see Engage - Overview.*

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Manage Engage	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission.	Engage

Create Campaign - Invitation

Prior to this enhancement, Engage email invitations and reminders were exclusively configured from the Invitation page of the campaign creation process.

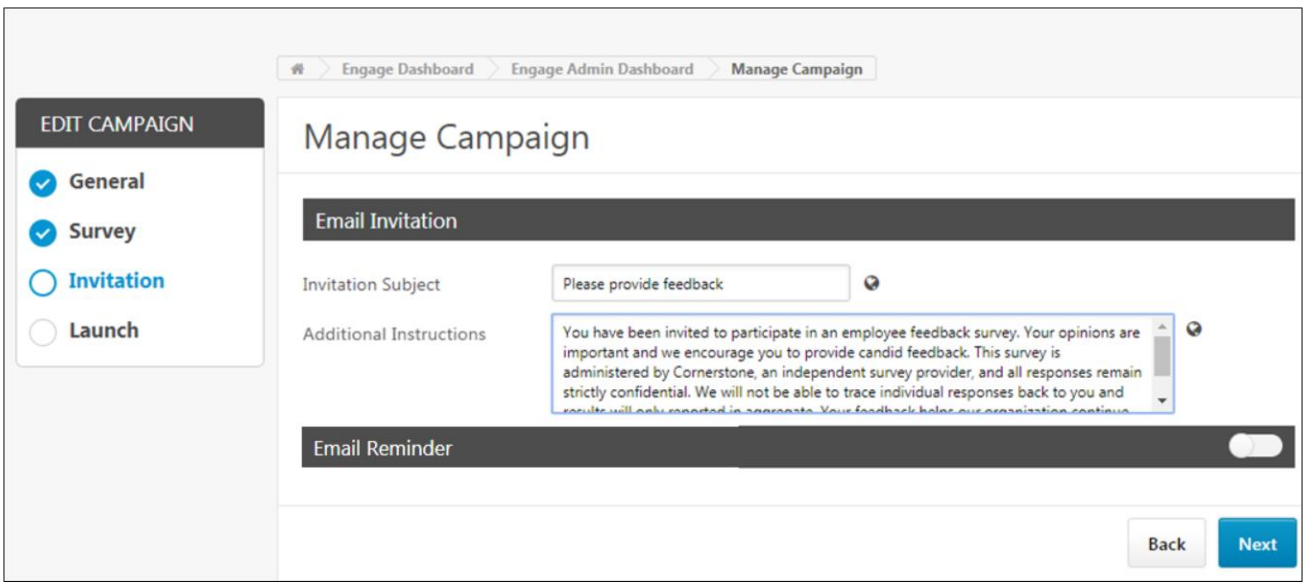
With this enhancement, only the email subject and additional instructions are configurable from the campaign creation process. Invitation and reminder emails are otherwise sent as configured in Core Email Administration. If the administrator wishes to customize the default Engage email templates, they must do so via Email Administration.

Note: *It is recommend that you only configure Engage availability via the Engage campaign configuration workflow, and not via Email Administration. Configuring availability from within Email Administration currently results in duplicate email invites and reminders being sent to users.*

To customize emails for a campaign, go to ANALYTICS > ENGAGE and click the **ADMIN DASHBOARD** button. Then, click the **CREATE CAMPAIGN** button and advance through the creation process to the Invitation step.

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



Invitation

Once the administrator navigates to the Invitation step, they can configure the Email Invitation and, if needed, the Email Reminder for the campaign. With the exception of the configurable fields on this page, Engage Invitation and Reminder emails are sent as configured in Email Administration as templates.

Email Invitation

In the Email Invitation section, configure the following fields:

- **Invitation Subject** - Enter the text that will display as the email subject when the Engage invitation email is sent to users. If a subject is entered here, this subject overrides the default subject configured in the Email Administration template.
- **Additional Instructions** - If the ENGAGE.ADDITIONAL.INSTRUCTIONS.TAG tag is being used in the Engage Invitation email template, administrators can use the Additional Instructions field to provide additional text which will then be substituted for the tag in the email body.

Email Reminder

To enable Engage reminder emails, toggle the Email Reminder switch to the On position. The section refreshes and allows the administrator to populate the following fields:

- **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 Subject** - Enter the text that will display as the email subject when the Engage reminder email is sent to users. If a subject is entered here, this subject overrides the default subject configured in the Email Administration template.
- **Additional Instructions** - If the ENGAGE.ADDITIONAL.INSTRUCTIONS.TAG tag is being used in the Engage Reminder email template, administrators can use the Additional Instructions field to provide additional text which will then be substituted for the tag in the email body.

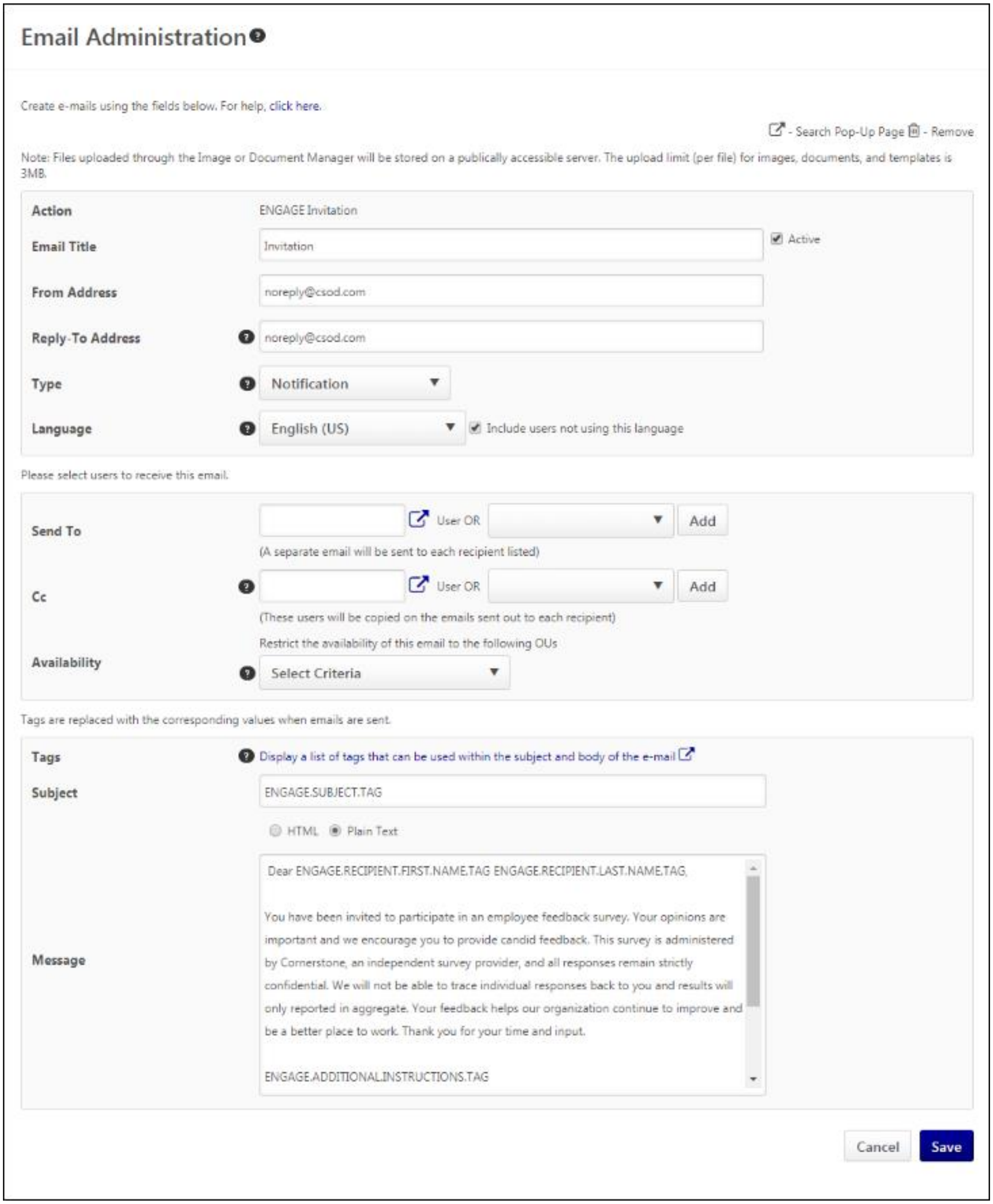
Engage Invitation Template

The Engage Invitation email template can be configured from the Email Administration page. Once configured, the template is automatically applied to Engage campaigns with **Email Link** selected as the distribution method.

To access Email Administration, go to ADMIN > TOOLS > CORE > EMAIL MANAGEMENT. Search for the Engage Invitation email trigger and then click the Add Email icon to the right of the trigger.

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



Create Engage Invitation Email

Configure the following email template settings for the initial email users will receive when they are invited to participate in a survey:

- **Email Title** - Enter the title for the email. This title is used to identify the email from the Email Administration page later.

- **From Address** - Enter the email address which will appear as the From address when users receive the email invitation.
- **Reply-To Address** - If a recipient of the email invitation replies to the email, this is the email address their reply is delivered to.
- **Type** - Select an email type from the drop-down menu. The Confirmation, Notification, and Promotional email types are used for organizational purposes so that administrators can categorize email triggers and more quickly locate certain email triggers when searching from the Email Management page.
- **Language** - Select a language from drop-down list. Emails only fire to recipients that are defined in the **Send To** field if the template matches the user's language preference when the action is performed.
- **Send To** - Select either a specific user to receive the email, or select from the drop-down a list of relevant job roles.
- **Cc** - Select either a specific user or select a recipient from the drop-down list. Once you have selected a user or a role, you must click the **ADD** button.
- **Availability** - Choose whether or not to restrict the availability of the email to a specific OU. **Note:** *Because Engage campaigns have availability filters configured on a per campaign basis, it is recommended that administrators do NOT change the default availability of the Engage email templates.*
- **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 information when the email is sent. *See* **Engage Invitation and Reminder Email Tags** *on* page 119 *for additional information.*
- **Subject** - Enter the subject of the email users will receive. By default, the subject, "Please provide feedback" is entered. This field can be localized into other languages.
- **Message** - 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. A default email body using tags is provided, which can be changed if needed. This field can be localized into other languages.

For more information about creating emails, *see Email - Create.*

Save

After configuring the Engage Reminder email template, click the **SAVE** button at the bottom of the page.

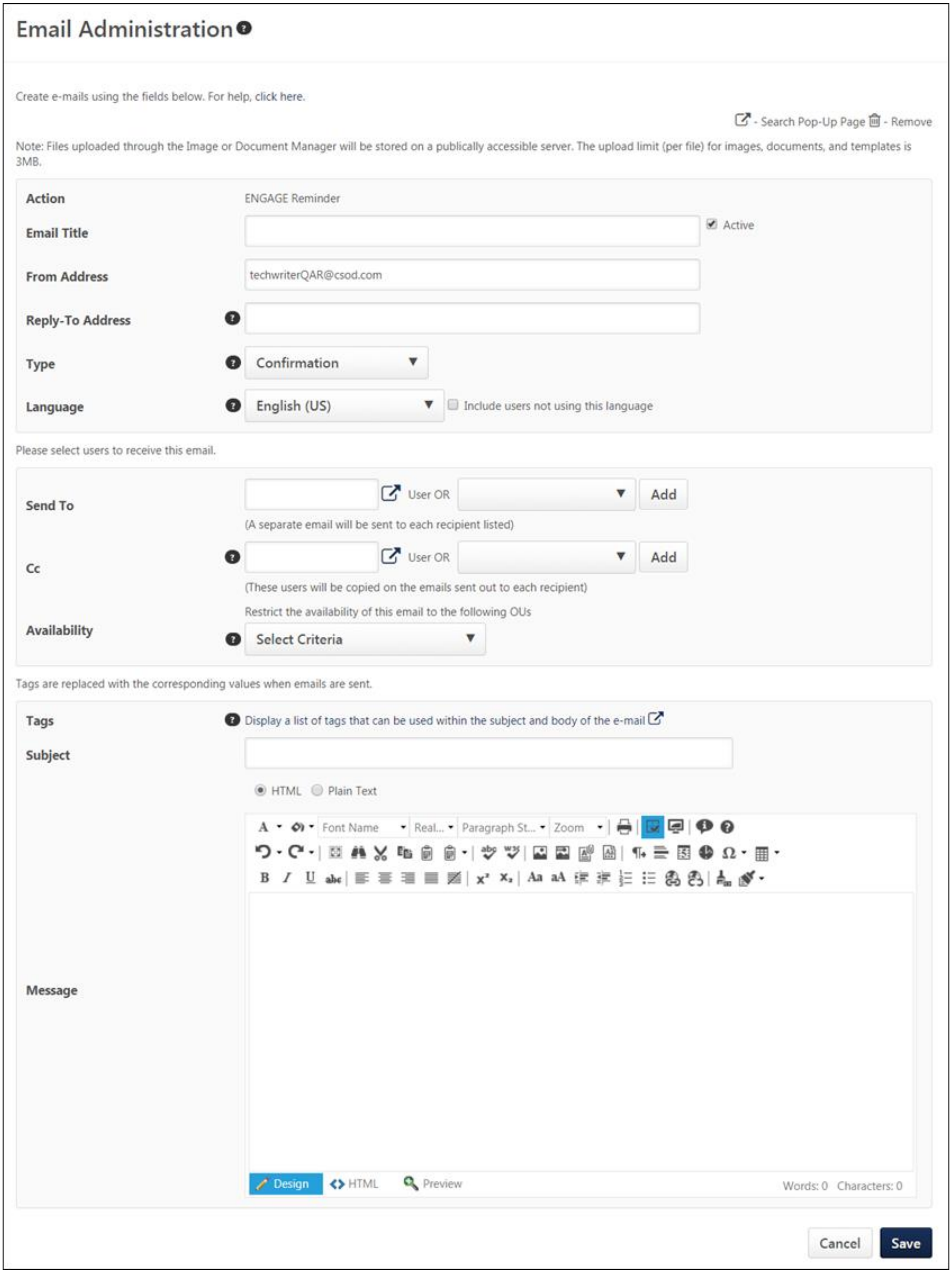
Engage Reminder Template

The Engage Reminder template email can be configured from the Email Administration page. Once configured, the template is automatically applied to Engage campaigns with **Email Link** selected as the distribution method.

To access Email Administration, go to ADMIN > TOOLS > CORE > EMAIL MANAGEMENT. Search for the Engage Reminder email trigger and then click the Add Email icon to the right of the trigger.

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


Email Administration
Create e-mails using the fields below. For help, click here.
- Search Pop-Up Page - Remove
Note: Files uploaded through the Image or Document Manager will be stored on a publically accessible server. The upload limit (per file) for images, documents, and templates is 3MB.
Action
ENGAGE Reminder
Email Title
Active
From Address
techwriterQAR@csod.com
Reply-To Address
Type
Confirmation
Language
English (US)
Include users not using this language
Please select users to receive this email.
Send To
User OR
Add
(A separate email will be sent to each recipient listed)
Cc
User OR
Add
(These users will be copied on the emails sent out to each recipient)
Restrict the availability of this email to the following OUs
Availability
Select Criteria
Tags are replaced with the corresponding values when emails are sent.
Tags
Display a list of tags that can be used within the subject and body of the e-mail
Subject
HTML
Plain Text
Font Name
Real...
Paragraph St...
Zoom
Message
Design
HTML
Preview
Words: 0 Characters: 0
Cancel
Save

Create Engage Reminder Email

Configure the following email template settings for the initial email users will receive when they are reminded to participate in a survey:

- **Email Title** - Enter the title for the email. This title is used to identify the email from the Email Administration page later.
- **From Address** - Enter the email address which will appear as the From address when users receive the email reminder.
- **Reply-To Address** - If a recipient of the email reminder replies to the email, this is the email address their reply is delivered to.
- **Type** - Select an email type from the drop-down menu. The Confirmation, Notification, and Promotional email types are used for organizational purposes so that administrators can categorize email triggers and more quickly locate certain email triggers when searching from the Email Management page.
- **Language** - Select a language from drop-down list. Emails only fire to recipients that are defined in the **Send To** field if the template matches the user's language preference when the action is performed.
- **Send To** - Select either a specific user to receive the email, or select from the drop-down a list of relevant job roles.
- **Cc** - Select either a specific user or select a recipient from the drop-down list. Once you have selected a user or a role, you must click the **ADD** button.
- **Availability** - Choose whether or not to restrict the availability of the email to a specific OU. **Note:** *Because Engage campaigns have availability filters configured on a per campaign basis, it is recommended that administrators do NOT change the default availability of the Engage email templates.*
- **Tags** - Click the tags search icon to see a list of tags which can be used in an Engage campaign reminder. Tags are replaced with specific information when the email is sent. *See* **Engage Invitation and Reminder Email Tags** *on* page 119 *for additional information.*
- **Subject** - Enter the subject of the email users will receive. This field can be localized into other languages.
- **Message** - 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. This field can be localized into other languages.

For more information about creating emails, *see Email - Create.*

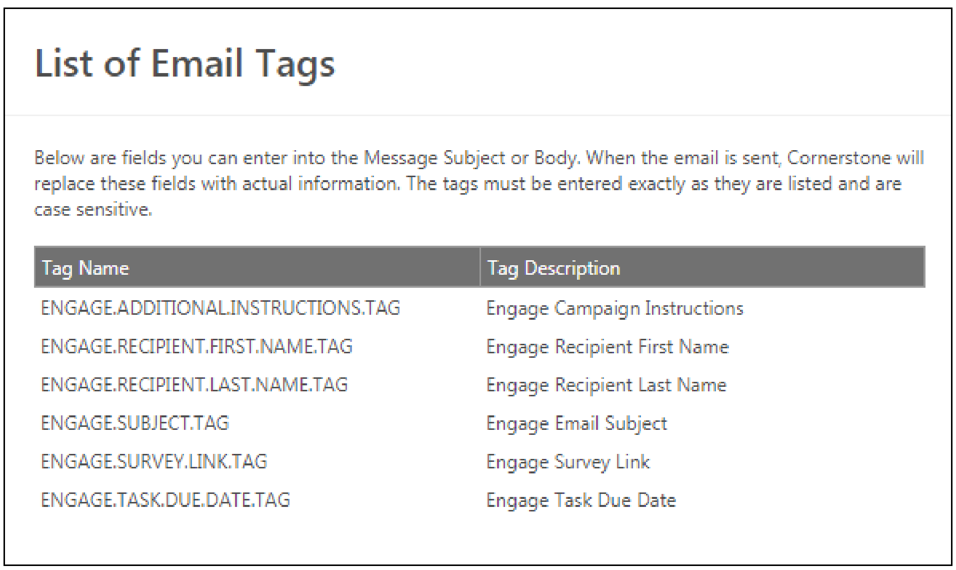
Save

After configuring the Engage Reminder email template, click the **SAVE** button at the bottom of the page.

Engage Invitation and Reminder Email Tags

The following new tags are available for use with the Engage Invitation and Engage Reminder core email templates:

- ENGAGE.ADDITIONAL.INSTRUCTIONS.TAG - Additional Instructions text provided by the administrator during campaign creation is substituted when this tag is used in an Engage email template.
- ENGAGE.RECIPIENT.FIRST.NAME.TAG - The email recipient's first name is substituted when this tag is used in an Engage email template.
- ENGAGE.RECIPIENT.LAST.NAME.TAG - The email recipient's last name is substituted when this tag is used in an Engage email template.
- ENGAGE.SUBJECT.TAG - The Engage email subject text provided by the administrator during campaign creation is substituted when this tag is used in an Engage email template.
- ENGAGE.SURVEY.LINK.TAG - A link to the Engage survey is substituted when this tag is used in an Engage email template.
- ENGAGE.TASK.DUE.DATE.TAG - The due date of the Engage task is substituted when this tag is used in an Engage email template.



List of Email Tags

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

Tag Name	Tag Description
ENGAGE.ADDITIONAL.INSTRUCTIONS.TAG	Engage Campaign Instructions
ENGAGE.RECIPIENT.FIRST.NAME.TAG	Engage Recipient First Name
ENGAGE.RECIPIENT.LAST.NAME.TAG	Engage Recipient Last Name
ENGAGE.SUBJECT.TAG	Engage Email Subject
ENGAGE.SURVEY.LINK.TAG	Engage Survey Link
ENGAGE.TASK.DUE.DATE.TAG	Engage Task Due Date

Dashboard Usability Enhancements

Dashboard Usability Enhancements - Overview

Prior to this enhancement, when administrators or managers configured a set of filters for the data on the Engage Dashboard, these filter settings were lost when the user navigated away from the page.

With this enhancement, filter settings on the Engage Dashboard are also automatically saved so that any filter settings made by an administrator or manager are active the next time they access the page.

Implementation

This functionality is automatically enabled for all portals using the Engage module. If your organization wishes to use the Engage module and has not yet purchased this product, please reach out to Global Product Support. *See Engage - Overview for more information.*

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

Engage Dashboard Save State

When an administrator or manager applies filters or makes tab selections on the Engage Dashboard, these selections are saved for the user when they access the page again in the future. The filter and tab selections are not refreshed when the user navigates away from the page. Any selections made to the following Engage Dashboard features are saved and presented to the user the next time they navigate to the page:

- Campaign type tabs (Satisfaction, Engagement, or Commitment) **Note:** *The filter selections made on each of the campaign type tabs are also saved. For example, if the Satisfaction tab was the last tab the user viewed, the next time they access the Engage Dashboard, the Satisfaction tab will be selected. However, if they then navigate to the Engagement tab, any filters they selected the last time they viewed the Engagement tab are also saved.*
- Organizational unit (OU) filters
- Time span filters

Exceptions

Filter selections are NOT saved in the following circumstances:

- The user was in the process of selecting filters when the page was closed. The next time the user accesses the page, the Engage Dashboard displays with any filters selected prior to the user's attempted change. If no previous filter selections were made, the Engage Dashboard is returned to its default state.
- The selected filters returned zero results. The next time the user accesses the page, the Engage Dashboard is returned to its default state.

Delete Closed Campaigns

Delete Closed Campaigns - Overview

Prior to this enhancement, it was not possible to delete completed Engage campaigns.

With this enhancement, administrators can delete completed Engage campaigns from the Engage Admin Dashboard page, which helps reduce unnecessary page clutter.

Use Case

Holly, an Engage administrator for ACME Co, is learning how to use the Engage product in a pilot portal and accidentally launches a survey with incorrectly mapped driver questions. Now her company's Engage reporting dashboard displays inappropriate drivers. Holly is able to fix this issue by deleting the campaign, which then removes the incorrect drivers from the Engage Admin Dashboard.

Implementation

This functionality is automatically enabled for all portals using the Engage module. If your organization wishes to use the Engage module and has not yet purchased this product, please reach out to Global Product Support. *See Engage - Overview for more information.*

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

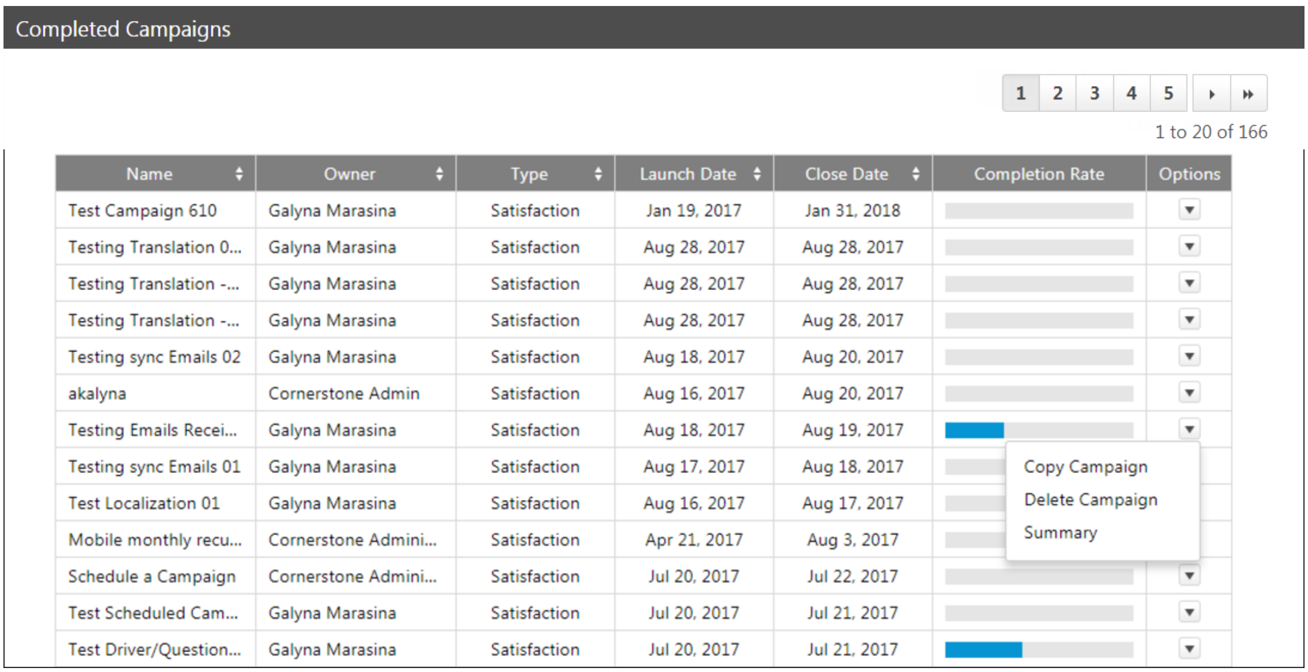
Engage - Delete Campaign

With this enhancement, completed Engage campaigns can be deleted via the Engage Admin Dashboard page.

To access the Engage Admin Dashboard, go to ANALYTICS > ENGAGE and click the **ADMIN DASHBOARD** button. Scroll down to view the Completed Campaigns section.

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


Completed Campaigns

1 2 3 4 5

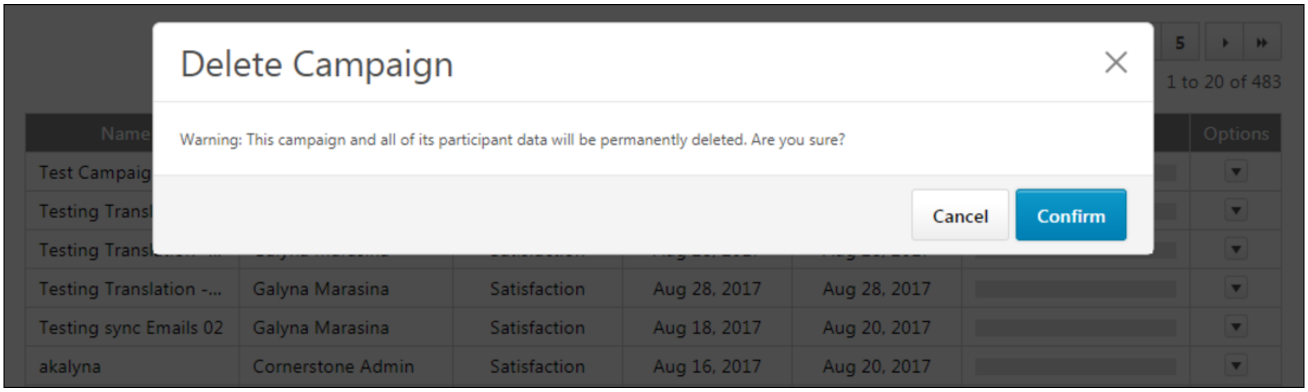
1 to 20 of 166

Name	Owner	Type	Launch Date	Close Date	Completion Rate	Options
Test Campaign 610	Galyna Marasina	Satisfaction	Jan 19, 2017	Jan 31, 2018		
Testing Translation 0...	Galyna Marasina	Satisfaction	Aug 28, 2017	Aug 28, 2017		
Testing Translation -...	Galyna Marasina	Satisfaction	Aug 28, 2017	Aug 28, 2017		
Testing Translation -...	Galyna Marasina	Satisfaction	Aug 28, 2017	Aug 28, 2017		
Testing sync Emails 02	Galyna Marasina	Satisfaction	Aug 18, 2017	Aug 20, 2017		
akalyna	Cornerstone Admin	Satisfaction	Aug 16, 2017	Aug 20, 2017		
Testing Emails Recei...	Galyna Marasina	Satisfaction	Aug 18, 2017	Aug 19, 2017		
Testing sync Emails 01	Galyna Marasina	Satisfaction	Aug 17, 2017	Aug 18, 2017		
Test Localization 01	Galyna Marasina	Satisfaction	Aug 16, 2017	Aug 17, 2017		
Mobile monthly recu...	Cornerstone Admini...	Satisfaction	Apr 21, 2017	Aug 3, 2017		
Schedule a Campaign	Cornerstone Admini...	Satisfaction	Jul 20, 2017	Jul 22, 2017		
Test Scheduled Cam...	Galyna Marasina	Satisfaction	Jul 20, 2017	Jul 21, 2017		
Test Driver/Question...	Galyna Marasina	Satisfaction	Jul 20, 2017	Jul 21, 2017		

Delete Campaign

To delete a completed Engage campaign:

1. Click the **Options** drop-down menu.
2. Click the **Delete Campaign** link. A warning message appears, asking if you are sure you want to permanently delete the campaign and all its data.
3. Click the **CONFIRM** button. The campaign will be deleted and cannot be recovered. The campaign and all its associated data are removed from the Engage dashboard.


Delete Campaign
Warning: This campaign and all of its participant data will be permanently deleted. Are you sure?
Cancel
Confirm
5
1 to 20 of 483
Name
Options
Test Campaig
Testing Transl
Testing Transl
Testing Translation -...
Galyna Marasina
Satisfaction
Aug 28, 2017
Aug 28, 2017
Testing sync Emails 02
Galyna Marasina
Satisfaction
Aug 18, 2017
Aug 20, 2017
akalyna
Cornerstone Admin
Satisfaction
Aug 16, 2017
Aug 20, 2017

Filter Enhancements

Filter Enhancements - Overview

Prior to this enhancement, administrators and managers could only filter Engage campaigns and results by division, location, and tenure. It was not always possible to target specific survey administrations or precise groups of participants.

With this enhancement, administrators can target groups and position organizational units (OUs) during campaign creation, allowing them to create more targeted campaigns with less effort. On the Engage Dashboard, administrators and managers can filter by position and campaign to view results that pertain directly to the data in which they are most interested.

Use Cases

Use Case 1

An Engage administrator wants to target specific groups of employees with the Employee Engagement survey. These groups include randomly sampled participants. Using group filters, she can configure an Engage campaign to precisely target one or more of these groups.

Use Case 2

An Engage administrator administers multiple Pulse survey campaigns at the same time, and wants to filter results so he can focus on a specific campaign's results. He visits the Engage Dashboard and applies campaign filters to view only the result data he wants.

Use Case 3

Managers at ACME Corp see a downward trend in satisfaction amongst sales teams. They ask the HR team to send a follow-up survey to Account Executives, to see if they can identify potential retention triggers in advance. The HR team creates a survey with a Position filter to accomplish this task.

Considerations

The Group filter CANNOT be used to filter search results on the Engage Dashboard with this release.

Implementation

This functionality is automatically enabled for all portals using the Engage module. If your organization is not currently using the Engage module, contact Global Product Support for enablement information. For more information about the Engage product, *see Engage - Overview.*

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

Engage Dashboard - Filters

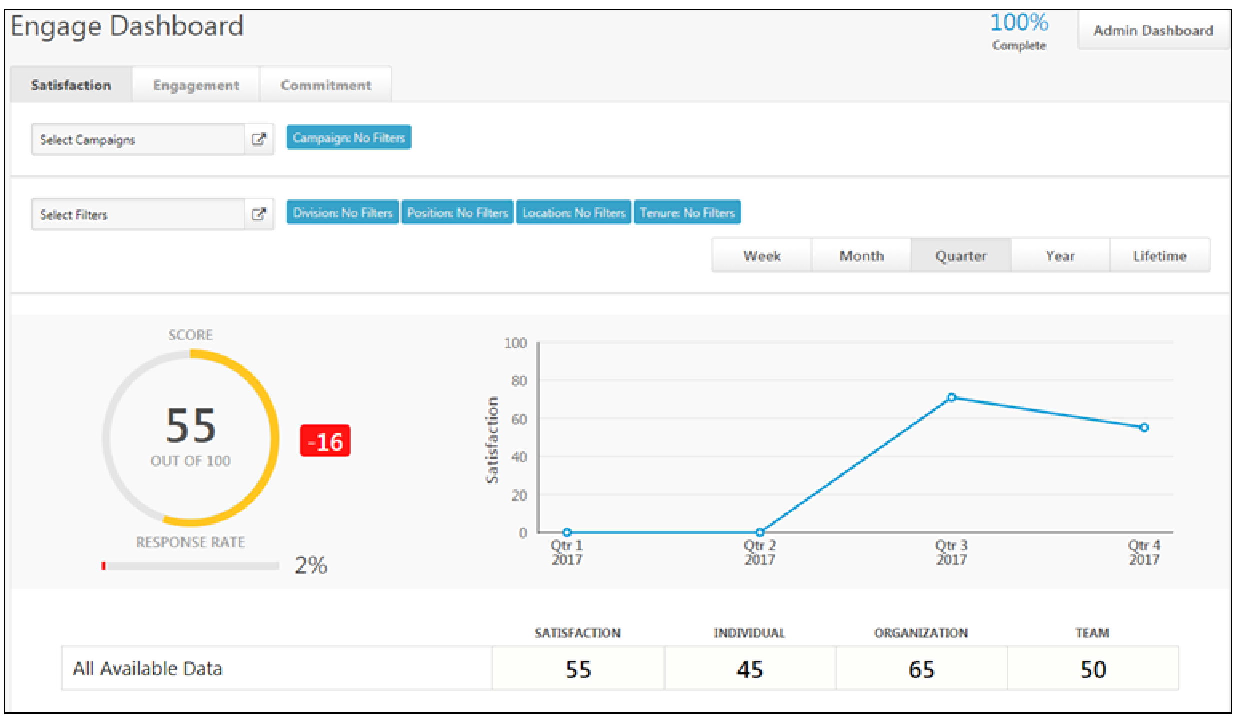
The Engage Dashboard displays a high-level view of the results of your Satisfaction, Engagement, and Commitment campaigns. Prior to this enhancement, these results could be filtered by division, location, and tenure.

With this enhancement, the Engage Dashboard charts and data can also be filtered by position organizational units (OUs) and campaigns. The Engage Dashboard defaults to a No Filters state on a user's first visit, which means all available data is included in the aggregation until the user selects a filter.

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



Select Filters

To filter Engage Dashboard data:

1. Click the **Select Campaigns** field. A flyout menu appears (Optional step).
2. Toggle the **Use Filters** switch to the On position and select one or more active or completed campaigns. Click the **SUBMIT** button after making your selections (Optional step).
3. Click the **Select Filters** field, which is located immediately under the Select Campaigns field. A flyout menu appears.
4. Choose an OU type or campaign from the flyout menu. You can select any of the following options:
    - Division
    - Location
    - Tenure
    - Position
5. Expand the parent OUs for the selected OU type by clicking the drop-down arrows to the left of the parent OUs, and then check the boxes next to the OUs to which you want to set campaign availability.
6. Click the **SUBMIT** button when done.

The Engage Dashboard refreshes to display data filtered by the selected OUs or by campaign.

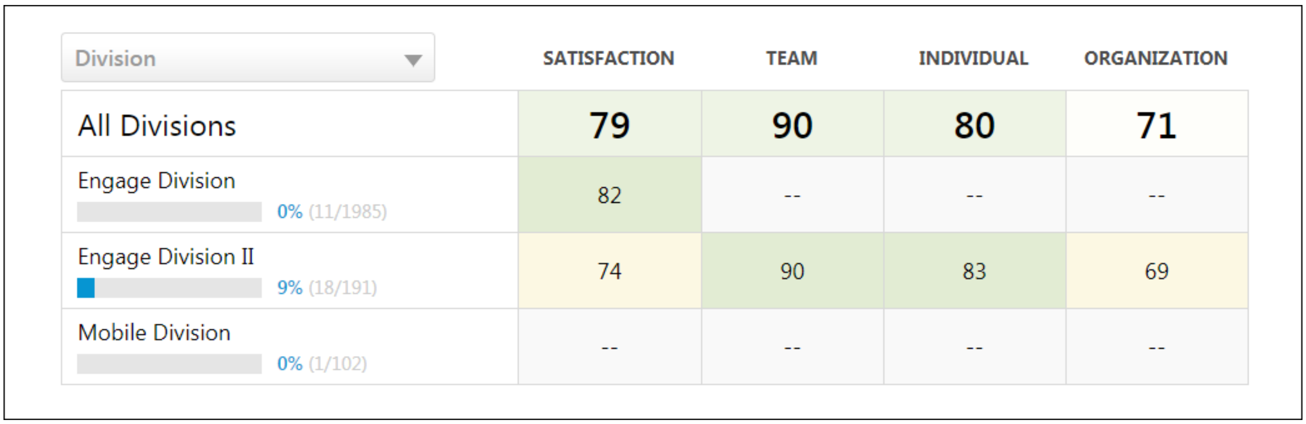
Engage Heat Map - Filters

Administrators and managers can compare data from campaigns or position organizational units (OUs) using the filters available for the Engage Dashboard heat map.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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



Heat Map Filters

The Engage Dashboard heat map allows users with the appropriate permission to view survey response data results by the following criteria:

- Division
- Location
- Position

To view heat map results by one of the above criteria, first select one or more Division, Location, or Position filters and click the **SUBMIT** button. Then click the heat map filter drop-down menu and select the desired filter from the list. For example, if you select the Position filter, heat map results will be displayed by the different positions from which survey results have been received.

Create Campaign - Select Filters

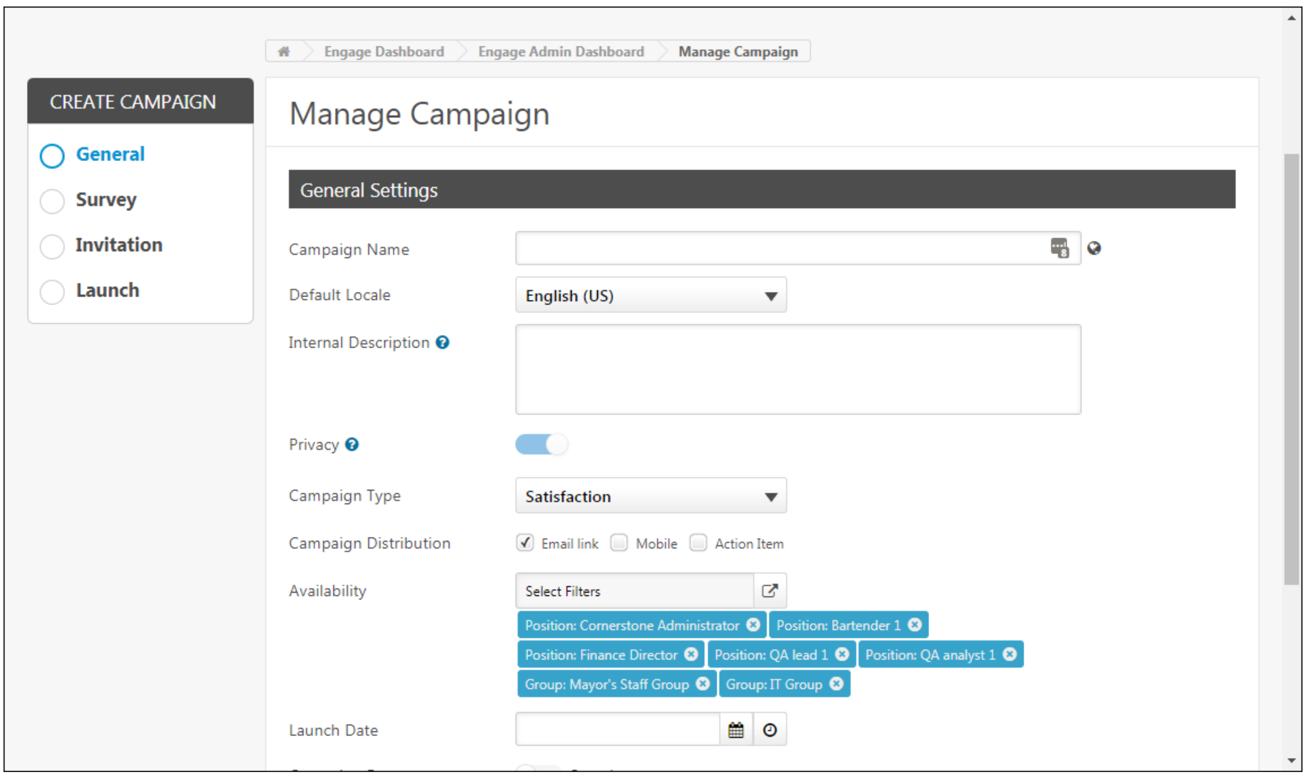
Prior to this enhancement, administrators could make Engage campaigns available to either division or location organizational units (OUs). For example, the survey could be made available to all users in the Sales division or to all users in California.

With this enhancement, administrators can also make Engage campaigns available to group and position OUs during the campaign creation process. **Note:** *Groups must be created from the Organization Units page prior to use with the Engage module.* *See Group - Create/Edit for more information.*

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



Availability

From the **Availability** field, choose which users will receive the survey:

1. Click the **Select Filters** icon. A flyout menu appears.
2. Choose an OU type. You can select any of the following OUs:
    - Division

- Location
- Tenure
- Position
- Group

3. Expand the parent OU(s) for the selected OU type by clicking the drop-down arrows to the left of the parent OUs, and then check the boxes next to the OUs to which you want to set campaign availability.
4. Click the **SUBMIT** button when done.

The campaign survey will only be distributed to users who meet the selected availability.

Learning

Child LO Upgraded During Curriculum Reversioning - Overview

Prior to this enhancement, when a curriculum was reversioned, users who had the previous version of the curriculum on their transcript automatically received the new version, but any new version of child learning objects (LOs) within the curriculum were NOT updated on users' transcripts.

With this enhancement, when a curriculum is reversioned, users with the original curriculum version on their transcripts are always upgraded to the newest version of the curriculum, as well as the latest version of child LOs within the curriculum. This behavior applies to the following processes:

- Curriculum versioning
- Online course versioning which results in the auto-upgrade of a curriculum
- Material versioning which results in the auto-upgrade of a curriculum
- Learning Assignment Tool Reassignment

Considerations

- Users receive the new child LO version in a Registered status.
- Users in a Completed status for the previous child LO version do NOT receive the new version.

Implementation

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

Connect Streams Free Version (Early Adopter)

Connect Streams Free Version (Early Adopter)

Connect Streams is a new functionality that enables users within the organization to collaborate and provide informal training in real time with text and voice chat around websites, documents, and their own computer screens. A stream is a webinar-like session that is entirely created and maintained by end users to allow experts to easily disseminate their knowledge. Within a stream, users can share their screen or a document. Users can incorporate conference calls, audio chat, text chat, video chat, and webinar chat. Users can pass control of their screen to other users.

Use Cases

Todd is a Sales Associate at ACME Corp. Todd is extremely knowledgeable about Salesforce reporting and has become known throughout the Sales department as the expert for reporting questions.

Every week, Todd receives questions about reporting from other sales people, and many times the questions are very similar. Todd could create documentation for these questions and share it with the department, but he has very limited time, and it would be difficult to explain the functionality without demonstration.

To address this problem, Todd starts a Live Stream in Connect and sends an invite link to the Sales department. He then guides his viewers through a demonstration and takes questions via voice and text chat to ensure that there is no confusion on what he is teaching.

The following week, Todd receives a much smaller volume of redundant reporting questions, freeing his time to focus more on sales.

Considerations

Connect Streams is currently not available to test in Stage portals.

Connect Streams Free Version is currently an Early Adopter feature. This means that the functionality is available to be self-enabled in Production, Pilot, and Stage environments, but the feature will continue to be improved, and is not yet considered generally available as it may not meet the needs of the entire client base. In the future, Cornerstone will also introduce Connect Streams Premium, which will include additional features.

Hosting a screenshare is currently limited to Firefox browsers. There is a longer term effort to support screensharing on Internet Explorer and Chrome browsers. Please note that any browser can view a shared screen.

This functionality does not integrate with Live Feed at this time.

This version of Connect Streams is free to all organizations using the Connect module. However, Cornerstone is delivering a premium version of Connect Streams in a future release. The premium version will include the ability to record a stream, schedule a stream, browse and search streams, and potentially more features.

Implementation

Connect Streams is currently not available to test in Stage portals.

This functionality is automatically available for all organizations using the Connect module. However, administrators with the Manage Streams permission must enable this functionality via the Streams Preferences page.

Organizations may choose to disable the Streams functionality entirely via a backend setting. This disables the Manage Streams permission and the Streams Preferences page, preventing administrators from enabling the Streams functionality. To disable the Streams functionality, contact Global Product Support.

Upon release, the Manage Streams permission is automatically added to the default System Administrator role and the View and Create Streams permission is automatically added to the default role for all users. This enables administrators to adjust which users have permission to view and create streams prior to enabling the functionality.

Glossary

- Samesurf - This is a third party vendor that provides the Streams functionality within Connect.
- Stream - A stream is a webinar-like session that is entirely created and maintained by end users to allow experts to easily disseminate their knowledge. Within a stream, users can share their screen or a document. Users can incorporate conference calls, audio chat, text chat, video chat, and webinar chat. Users can pass control of their screen to other users.

Frequently Asked Questions (FAQs)

See **Connect Streams Frequently Asked Questions (FAQs)** *on* page 152 *for additional information.*

Security

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Streams	Grants ability to view the Streams Preferences page within Connect Administration. This permission cannot be constrained.	New Connect
View and Create Streams	When the Streams functionality is enabled via Streams Preferences, this permission enables users to access the Streams page and the Live Stream page in Connect. This permission cannot be constrained.	New Connect

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Navigation Tabs and Links -	Grants ability to manage Navigation Tabs and Links for the portal. This permission can be constrained by OU,	Core Administration

Manage	User's OU, and User's Corporation. This is an administrator permission.	

New Connect Administration

With this enhancement, a Streams Preferences link is now available on the New Connect Administration page. In addition, the page description for the New Connect Administration page is updated from "Manage dynamic teams" to "Manage preferences, teams, and streams."

To access the New Connect Administration page, go to ADMIN > TOOLS > CONNECT > NEW CONNECT ADMINISTRATION.

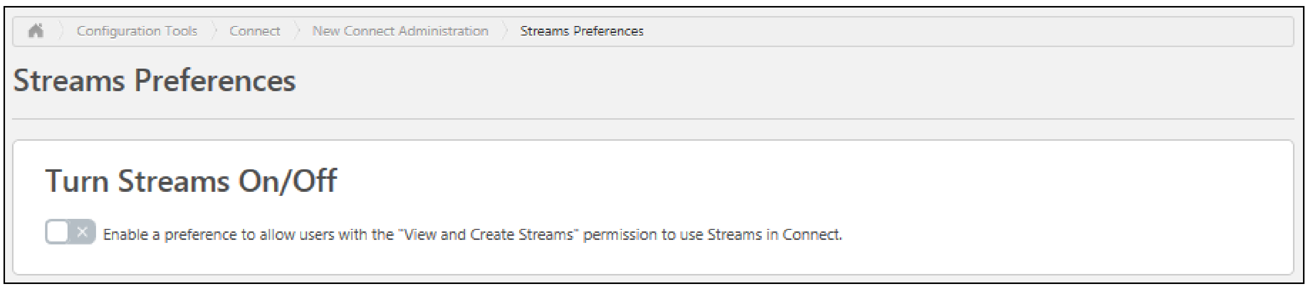
Streams Preferences

The Streams Preferences page enables administrators to enable or disable the Connect Streams functionality.

To access the Streams Preferences page, go to ADMIN > TOOLS > CONNECT > NEW CONNECT ADMINISTRATION > STREAMS PREFERENCES.

Permissions

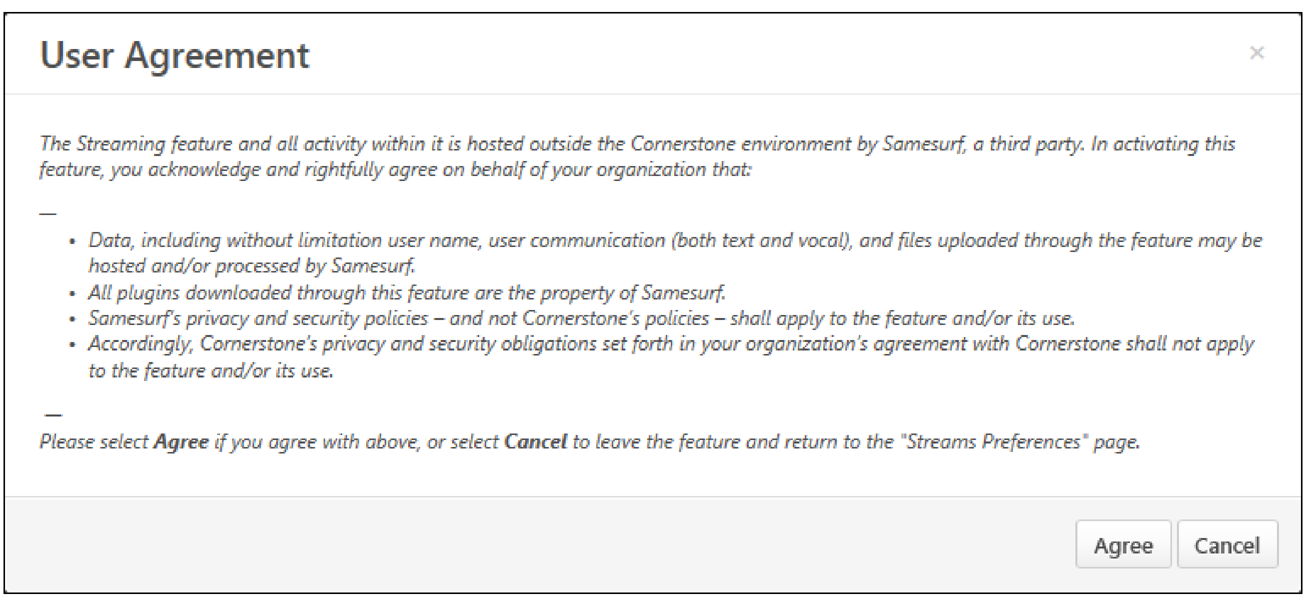
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Streams	Grants ability to view the Streams Preferences page within Connect Administration. This permission cannot be constrained.	New Connect



Turn Streams On/Off

This option enables administrators to enable or disable the Connect Streams functionality within their portal.

To turn the Streams functionality on within the portal, toggle the switch to the **ON** position. A User Agreement opens to explain that the Streaming feature and all activity within it is hosted outside of the Cornerstone environment by Samesurf, a third party. The details of the feature are displayed as well.



The administrator can select the **AGREE** button to accept the user agreement and enable the Streams functionality, or the administrator can select the **CANCEL** button to return to the Streams Preferences page without enabling the Streams functionality.

Once the functionality is enabled, any user who has permission to view and create streams is be able to use the Streams functionality within Connect.

Browser Limitation: *Hosting a screenshare is currently limited to Firefox browsers. There is a longer term effort to support screensharing on Chrome and Internet Explorer browsers. Please note that any browser can view a shared screen.*

Connect Streams - Add Streams Link to Navigation Tabs

The new Connect Streams page can be added as a link under a navigation tab.

To manage Navigation Tabs and Links preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > NAVIGATION TABS AND LINKS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.	Core Administration

Navigation Tabs and Links

To add the Streams page to a navigation tab in Navigation Tabs and Links:

1. Click the Add Page icon in the Options column of the navigation tab row. This opens the Select Page pop-up.
2. Click the plus icon to the left of the page name in the Add column. This adds the selected page to the bottom of the navigation tab to which the page was added. The page can then be reordered, if necessary, by dragging and dropping it into the appropriate position.
3. Once the Streams link has been added to the page, you can click the Edit icon next to the link to edit the link's title.
4. Click the **SAVE** button at the bottom of the page to save and apply the changes you have made to the navigation tabs and links.

Connect Streams Page

The Streams page within Connect enables users to view and create streams. A stream is a webinar-like session that is entirely created and maintained by end users to allow experts to easily disseminate their knowledge. Within a stream, users can share their screen or a document. Users can incorporate conference calls, audio chat, text chat, video chat, and webinar chat. Users can pass control of their screen to other users.

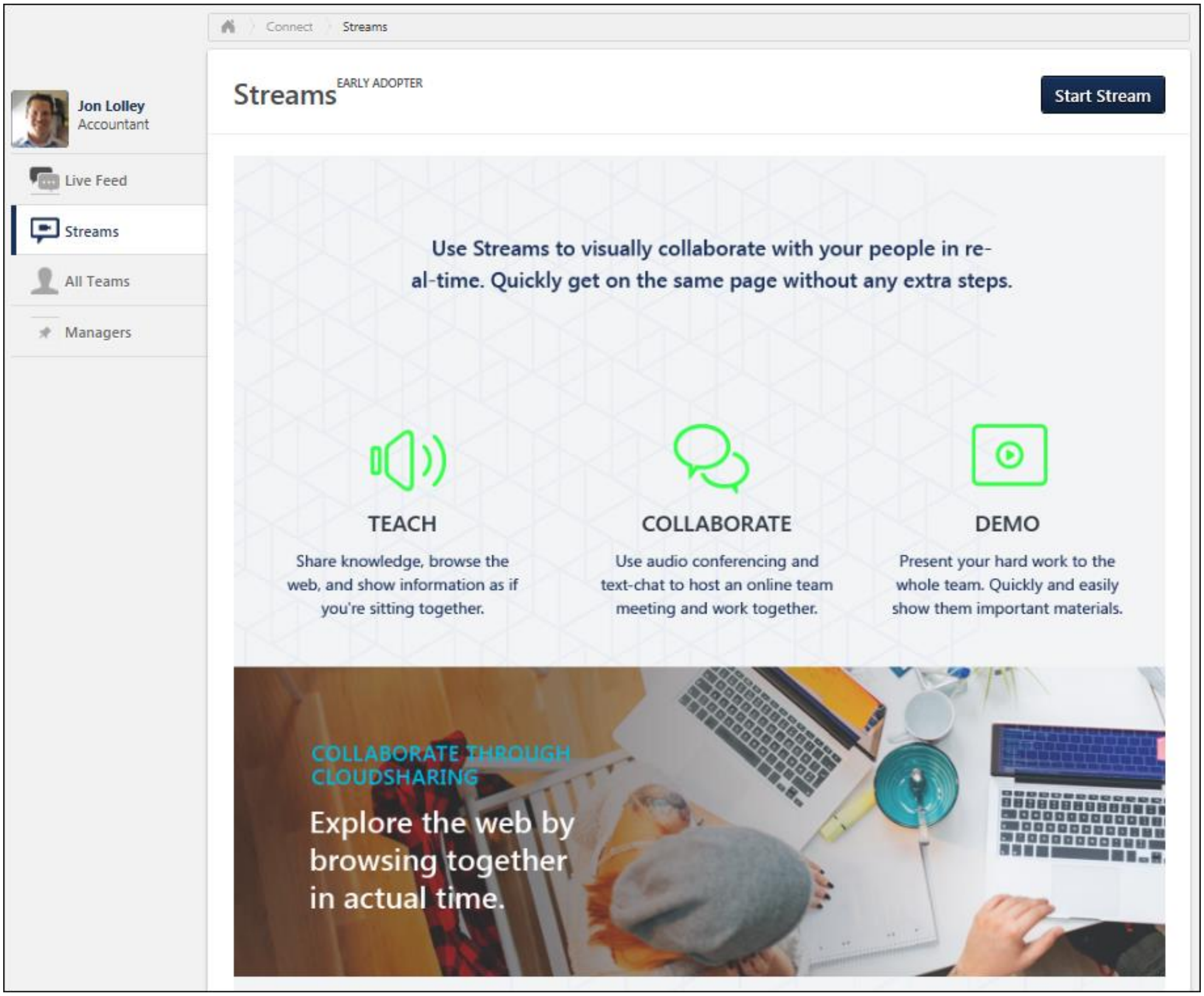
The Streams homepage displays a number of graphics that detail the Streams functionality and how it can benefit your organization. **Note:** *The text on these images is only available in English (US) and cannot be translated.*

The Connect Streams page is only available if Streams is enabled in the portal and if the user has permission to view and create streams.

To access the Streams page, select the Streams tab within Connect, or go to CONNECT > STREAMS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View and Create Streams	When the Streams functionality is enabled via Streams Preferences, this permission enables users to access the Streams page and the Live Stream page in Connect. This permission cannot be constrained.	New Connect



Start Stream

Select the **START STREAM** button to open a stream in a new tab. The new tab is still within the Cornerstone portal.

Browser Limitation: *Hosting a screenshare is currently limited to Firefox browsers. There is a longer term effort to support screensharing on Chrome and Internet Explorer browsers. Please note that any browser can view a shared screen.*

Connect Streams - Live Stream Page

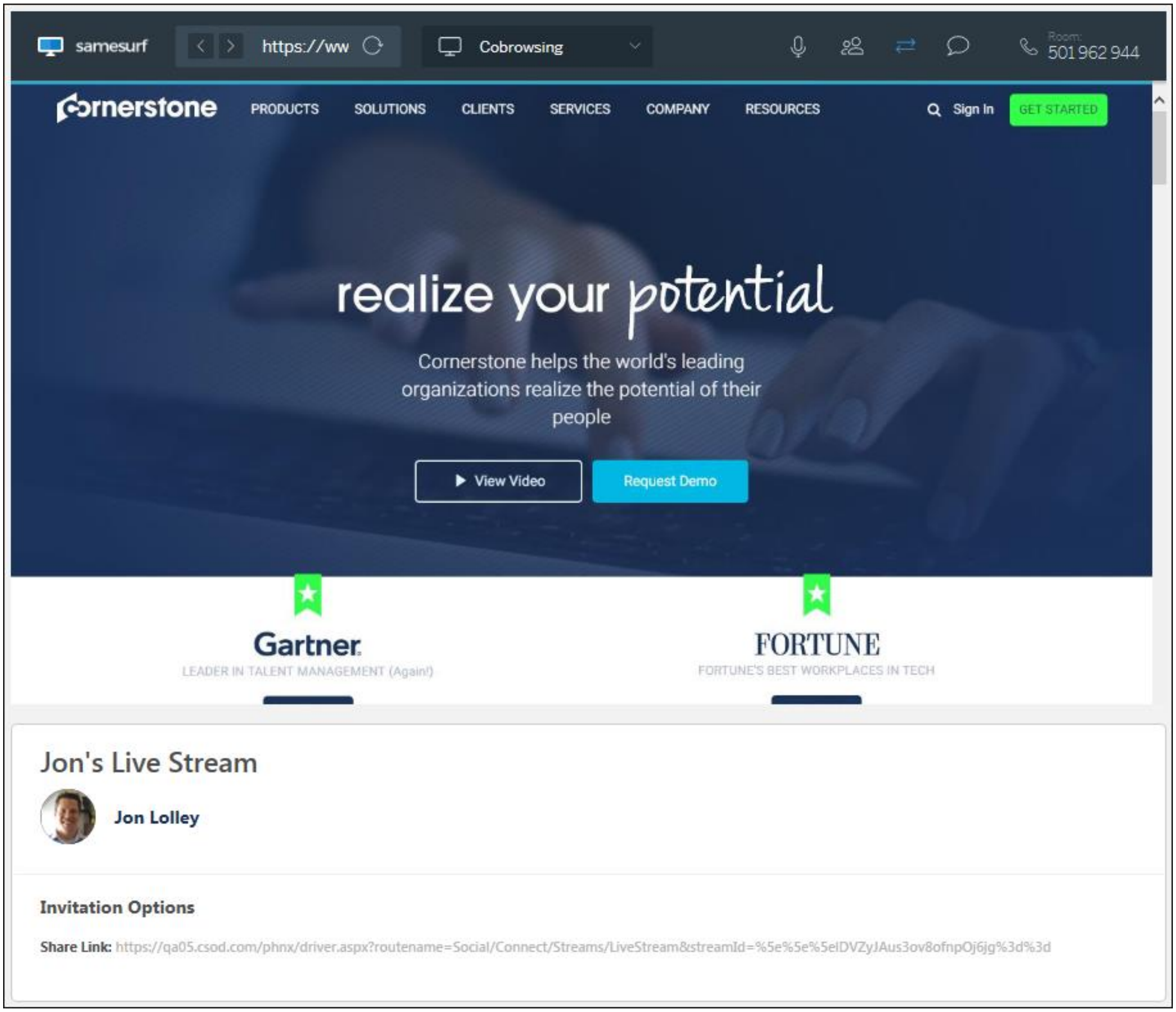
The Live Stream page within Connect enables users to view and create streams. A stream is a webinar-like session that is entirely created and maintained by end users to allow experts to easily disseminate their knowledge. Within a stream, users can share their screen or a document. Users can incorporate conference calls, audio chat, text chat, video chat, and webinar chat. Users can pass control of their screen to other users.

To start a new stream, select the Streams tab within Connect, or go to CONNECT > STREAMS. From the Streams page, select the **START STREAM** button to open a stream in a new tab. The new tab is still within the Cornerstone portal.

Browser Limitation: *Hosting a screenshare is currently limited to Firefox browsers. There is a longer term effort to support screensharing on Chrome and Internet Explorer browsers. Please note that any browser can view a shared screen.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View and Create Streams	When the Streams functionality is enabled via Streams Preferences, this permission enables users to access the Streams page and the Live Stream page in Connect. This permission cannot be constrained.	New Connect



Invite Others to Join Live Stream

Once a live stream is started, the host can invite others to join the live stream. At the bottom of the live stream, an Invitation Options section is available. This section includes a Share Link.

To invite other employees to join your live stream, copy the Share Link url and share it with them. Employees must have a valid login for the portal in order to join the live stream.

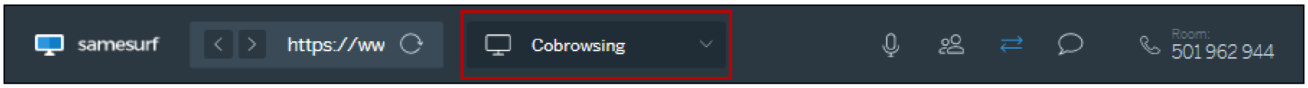
Collaboration Options

There are three collaboration options that are available within a stream. Each option enables different functionality within the stream.

- Cobrowsing - This option enables you to browse the Internet within the stream. You can input a webpage URL and view the webpage with other attendees. *See the Cobrowsing Collaboration section below for additional information.*

- Upload and Share - This option enables you to upload and share a file to view with other attendees. The accepted file types are pdf, png, jpg, gif, or mp4. *See the Upload and Share Collaboration section below for additional information.*
- Screen Sharing - This option enables you to share your computer or device screen with other attendees. Users must download a plug-in to use this method. *See the Screen Sharing Collaboration section below for additional information.*

To change the collaboration method, select the appropriate option from the Collaboration drop-down menu.

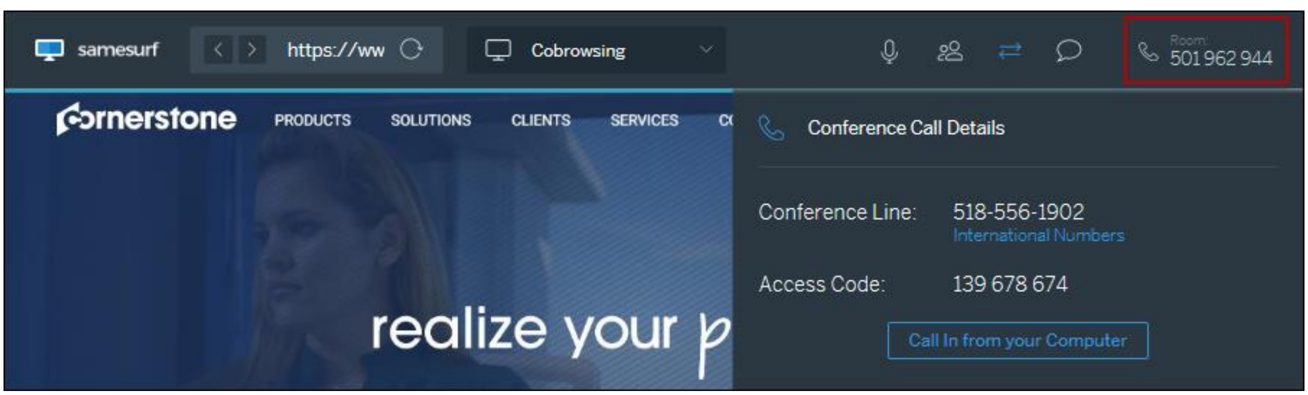


Conference Call

The Conference Call options enable the stream users to There are two options for joining the stream's conference call.

- Conference Line - This method enables users to call the conference line and enter the access code to join the conference call. International numbers are available by selecting the **International Numbers** link.
- Call in from your Computer - This method enables users to join the conference call using their computer's microphone and speakers.

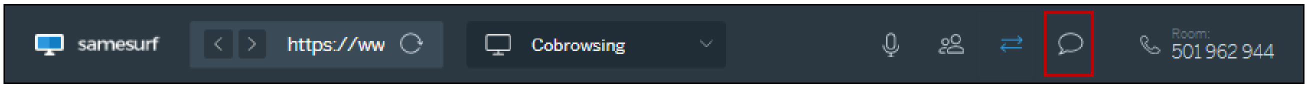
To view the conference call options, select the telephone icon or the room number in the Samesurf menu. Select **YES** to join, and then the conference call details are displayed. Utilize the conference line and access code to join the conference line, or select the **CALL IN FROM YOUR COMPUTER** button to join the call using your computer.

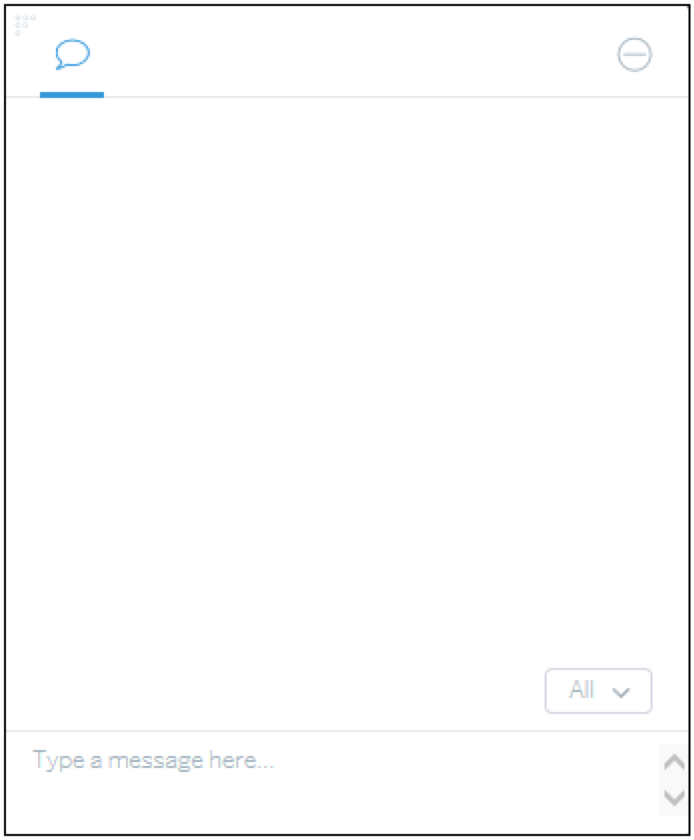


Chat

Users within the stream can send messages to all users within the stream or to a specific user within the stream.

To chat with other users in the stream, select the Chat icon in the Samesurf menu. The Chat window opens on the right side of the screen. You can choose who can view your message by selecting the appropriate option from the **All** drop-down menu.

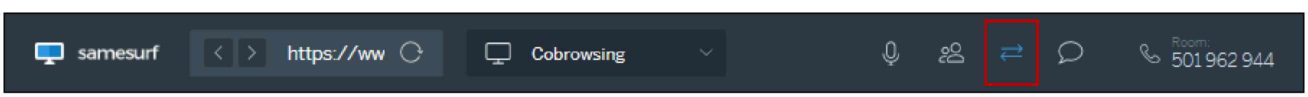




Pass Control to another User

The user who started the stream can pass presenter rights to another user within the stream. When control is passed to another user, the individual with the control rights has full access to any of the Collaboration options.

To pass control to another user in the stream, select the Pass Control icon in the Samesurf menu. Then, select the user to whom you are passing control.

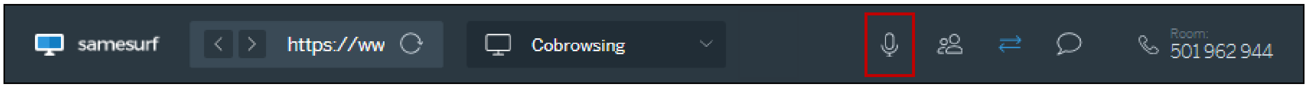


Communications

The following communications options are available by selecting the Communications option in the Samesurf browser.

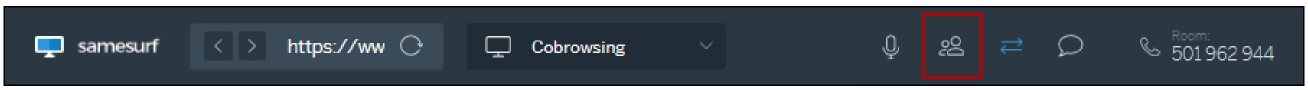
- Video Chat - This option opens a video screen and uses your device's camera or webcam to display your video to other participants. This option is only supported with Chrome and Firefox browsers.
- Audio Call - This option opens the Conference Call Details. *See the Conference Call section above for additional information.*

- Webinar Chat - This option enables the presenter to broadcast their device's camera or webcam to other participants. Only the presenter's video is shared. This option is only supported with Chrome and Firefox browsers.



People

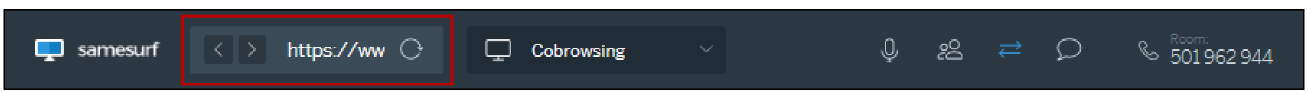
The presenter has the option to view all of the people who are within the stream, enable or disable the cursor from displaying in the stream, and disconnect users from the stream by selecting the People option in the Samesurf browser.



Cobrowsing Collaboration

The Cobrowsing collaboration option enables you to browse the Internet within the stream and view the webpage with other attendees. As the presenter navigates within the browser, all users within the stream can view the presenter's actions.

To browse to a webpage, enter the webpage in the URL field in the Samesurf menu.



Upload and Share Collaboration

The Upload and Share collaboration option enables you to upload and share a file to view with other attendees. When a file is uploaded, all users in the stream can view the file as the presenter interacts with it.

When this option is selected, you are prompted to select a file from your device to upload and share. The accepted file types are pdf, png, jpg, gif, or mp4.

Screen Sharing Collaboration

The Screen Sharing collaboration option enables you to share your computer or device screen with other attendees. All users in the stream are able to view the presenter's screen as the presenter navigates their device, opens files, and performs actions.

This option is only supported with Chrome and Firefox browsers. Also, the user who is sharing their screen must download a plug-in to use this method.

Connect Streams Frequently Asked Questions (FAQs)

Can I blacklist certain sites for cobrowsing?

Not at this time, but this will be consider for a future release based on client demand.

Do all my users get a Samesurf account?

No. For privacy reasons we create a single Samesurf account per client portal. This account can create multiple, simultaneous streams.

Where are my files going when using the "Upload and Share" feature?

All files from the "Upload and Share" feature are stored by Samesurf. However, Samesurf deletes all files from Cornerstone clients every two hours.

Is Cornerstone sending my users' names to Samesurf?

No, but users have the option to enter a name when starting or joining a session.

Is my IP address being sent to Samesurf?

Yes. However, Samesurf has passed rigorous security tests from Cornerstone-approved security auditors.

Is the Streams homepage localized?

No, but this enhancement is being explored for a future release.

What browsers allow me to join a Stream?

Internet Explorer (IE) 11 or later, Firefox, Chrome, Safari, and Opera.

Browser Limitation: *Hosting a screenshare is currently limited to Firefox browsers. There is a longer term effort to support screensharing on Chrome and Internet Explorer browsers. Please note that any browser can view a shared screen.*

What browsers allow me to share my screen?

Currently, hosting a screenshare is limited to Firefox browsers. However, viewing the screenshare of another user is available in any browser.

What browsers allow me to use Webinar Chat and Video Chat?

Currently, this functionality is limited to Chrome and Firefox browsers.

Why is Video Chat not working?

This is likely because your computer is behind a firewall. To resolve this, ask your IT department to "allow outbound UDP traffic."

Can I configure the default cobrowsing URL?

No, but this enhancement is being explored for a future release.

What reporting capabilities are supported?

None at this time, but this enhancement is being explored for a future release.

Where are Samesurf's servers located?

The United States and the United Kingdom. Samesurf knows what server should host a stream session based on the client location.

Where can I find Samesurf's privacy and security policy?

https://www.samesurf.com/policies.html

Is SSO or deep linking supported?

No, but this enhancement is being explored for a future release.

Is this optimized for mobile devices?

No, but this enhancement is being explored for a future release.

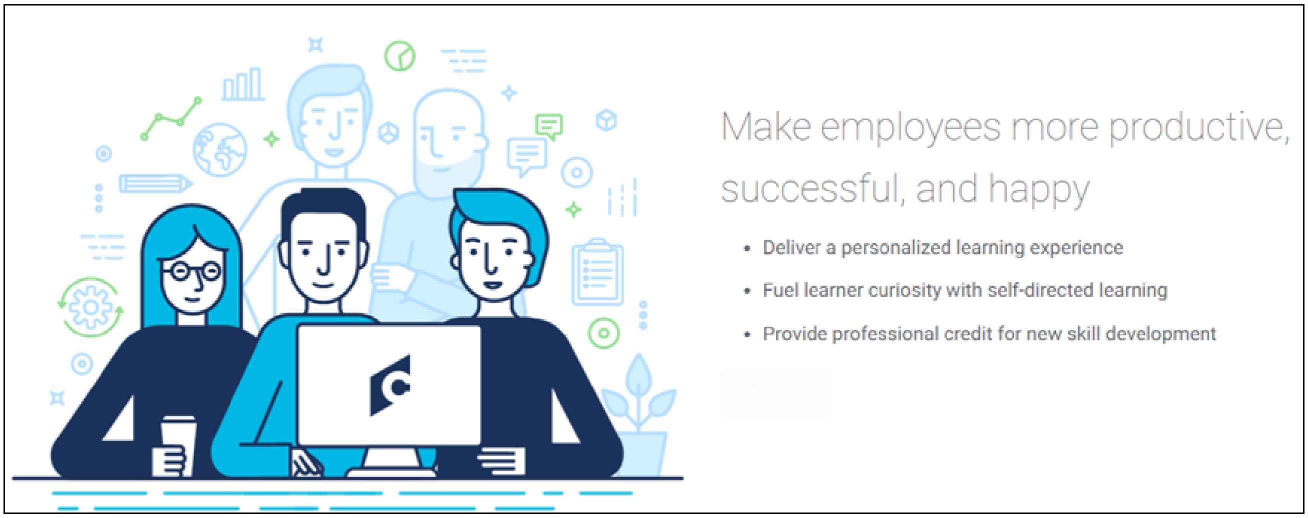
How many participants can join a stream?

This depends on the current demand across all clients. As Connect Streams is currently an Early Adopter program, the recommendation is 4-5 participants per stream while Cornerstone and Samesurf scale up capacity.

Content Anytime

Content Anytime is Cornerstone's new collection of fresh, modern content, carefully curated from the world's leading learning providers. Content Anytime is designed to empower organizations to fuel their employees' curiosity, inspire them to grow, and help them drive their own career path. Seamlessly integrate Content Anytime with the new Cornerstone Learning Experience Platform to help employees be more productive, successful, and engaged.

- For more information about Content Anytime, visit: **http://hr.cornerstoneondemand.com/Content-Anytime**
- To discuss enablement, please contact your Client Sales Executive.



Auto-Upgrade to Content Publishing Redesign with Online Course Versioning in the August '18 Release

Activating the new Content Publishing is optional until the August 2018 release. In August 2018, all portals still using old Course Publisher functionality will be automatically upgraded to the Content Publisher, and the old Course Publisher will no longer be accessible.

For more information about the Content Publishing Redesign, *See* **Content Publishing Redesign with Online Course Versioning - Overview** *on* page 156 *for additional information.*

Content Publishing Redesign with Online Course Versioning

Content Publishing Redesign with Online Course Versioning - Overview

Prior to this enhancement, the Course Publisher was used for creating, editing, and reversioning online courses in the system. Each process involved several steps which administrators did not always find intuitive.

With this enhancement, administrators can upload, manage, and reversion online courses via new, streamlined processes using the Content Uploader and Course Console. The new Content Publishing functionality allows administrators to:

- Initiate multiple course uploads at once and track upload progress
- Manage courses from one location
- Simplify and enhance version management with a flexible, intuitive set of new tools.
- Easily make minor course content updates without creating new course versions

Click here to access the Content Uploader Starter Guide.

Click here to access the Online Course Versioning Starter Guide.

Use Cases

Use Case 1: Upload Online Courses

William is a content developer at ABC Corporation. He completed the development of ten different IT Security Policy courses and wants to upload them to the system. William opens the Content Uploader, then drags and drops the files he wants to upload into the upload box. He can track the upload progress and see if the courses were uploaded successfully. Once the files have been uploaded successfully, drafts are automatically created for each course in the Course Catalog.

Use Case 2: Edit and Publish Draft Courses

William sees that one of his courses was uploaded successfully to the system, and now he wants to edit and publish the course. He accesses the Course Catalog and opens the draft course. He previews the course and finds that it works as expected, so he edits the course metadata and publishes it. If needed, he can continue to edit other fields directly from the Course Catalog.

Use Case 3: Upgraded Version of a Published Course

Tom is an administrator at Vital Pharmaceutical Corporation. Many times per month, Tom works with the compliance department to ensure all training complies with current and upcoming changes to laws and regulations. These legal changes often warrant modest changes to current courses, and have varying effective dates.

Tom and his managers feel that creating multiple courses on the same topic and manually managing effective dates and versioning is difficult and also creates a high risk of human error, contributing to non-compliance. As a learning administrator, Tom needs the ability to version online courses, manage their effective dates, and reassign them to organizational units that have the previous version.

Whenever Tom needs to create a new version of an online course, he can work through the Online Course Versioning tool to ensure all changes are captured and ensure all that users with the previous version receive the upgraded version.

Use Case 4: Modify the Content of a Published Course

Mary is an administrator at ABC Corporation, responsible for managing the training in the portal. Mary wants to make a small text change to one screen in an online course she manages. Mary can go to the Course Console and click the **MODIFY CONTENT** button to be taken through a workflow that allows her to upload an image file to make the change. She does not need to go through the more advanced versioning process for such a small change. After she uploads the new file, the course is updated on all users' transcripts and no new version is created.

Use Case 5: View Uploads History

Susan is a learning administrator at ABC Corporation, responsible for managing the training on the portal. Susan wants to track all course uploads on the portal. She accesses the Upload History page from the Content Uploader and is able to view all available uploads and their statuses. This page provides Susan with a comprehensive view of all uploads in her portal. This is useful to her because the Content Uploader page only displays her own uploads.

Considerations

With the October '17 release, after the Content Publishing features have been activated in the portal, administrators with the previously existing Course Publisher permission are automatically granted the following new permissions:

- Upload History - View
- Online Class - Upload
- Online Class - Publish

After the Content Publishing features have been activated in the portal, administrators with the previously existing Course Publisher - Update permission are automatically granted the following new permission:

- Online Class - Modify

All other new permissions related to online classes and the Upload History page must be distributed manually as needed.

Exclusions

- The ability to view version and assignment history is not included in this release. This functionality will be added in a future release or patch. In the meantime, custom and standard reports can be used to track prior completed training. The following custom report types can be used to report on new, reversioned, and modified online courses:
    - Assignment
    - Transcript

    - Evaluations
    - Training
    - Training Plan
    - Transaction
    - Multi-Module
- The following standard reports have a Version field for reporting on online course versions:
    - System > User Transcript Audit Report
    - Track Employees > Past Due
    - Training > Enterprise Training
    - Training > Enterprise Past Due Training
- Cohort versioning is out of scope . If an online course is included within the structure of a cohort, when the online course is reversioned, the cohort structure is not impacted by the new version.
- When an online course is reversioned, certifications and development plans containing the previous version of the online course are NOT impacted.
- The Learning Assignment Summary page is not impacted by this enhancement. Only the latest active version of an online course may display on the Learning Assignment Summary page.

Implementation

This functionality is automatically available in all portals using the Learning module. Following the October release, to use Content Publishing functionality, administrators must enable the Content Publisher via self-service activation in Learning Preferences. After the Content Publishing features have been activated in the portal, the old Course Publisher is deactivated and no longer available for use. *See* **Content Activation Preferences** *on* page 163 *for additional information.*

Activating Content Publisher is optional until the August 2018 release. In August 2018, all portals still using old Course Publisher functionality will be automatically upgraded to the Content Publisher, and the old Course Publisher will no longer be accessible.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Online Class - Modify	Grants ability to modify an online class without creating a new version of the online class.	Learning - Administration
Online Class - Publish	Grants access to two pieces of functionality: ○ Publish button on the Course Console, allowing administrator to publish a draft online class ○ Upload section of the online class versioning	Learning - Administration

	workflow As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration
Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission. As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration
Content Uploader - Manage Uploads with Undefined Providers.	Allows administrators to view and manage uploads with undefined providers on the Uploads History page.	Learning - Administration
Upload History - View	Grants ability to view the Upload History page.	Learning - Administration
Online Class Versioning Preferences	Grants ability to set default options for the online class versioning process. This is an administrator permission.	Learning - Administration
Content Publishing - Self Activation	Grants access to the Content Activate Preferences page, where an administrator can activate new Learning Features associated with the Content Publishing Features and Online Course Versioning.	Learning - Administration

The following updated permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog 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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration
Course Publisher	Grants access to LCMS Course Publisher, which enables upload and publishing of SCORM and AICC compliant online courses, created either in the LCMS Course Builder, or from a third party course building tool. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator permission. 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.	Learning - Administration
Course Publisher Update	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. 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.	Learning - Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment	Grants ability to create Standard (one-time) and Dynamic	Learning -

Tool - Standard and Dynamic	(continuous) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Administration
Assignment Tool - Standard and Dynamic - Recurrence	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. Also grants ability to enable/disable Recurrence when creating a Dynamic Learning Assignment. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Course Catalog - View	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.	Learning - Administration
Edit Online Course Providers	Grants ability to edit the Provider field for an online course via the Course Catalog and Course Console. User must also have permission to view the Course Catalog. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Content Activation Preferences

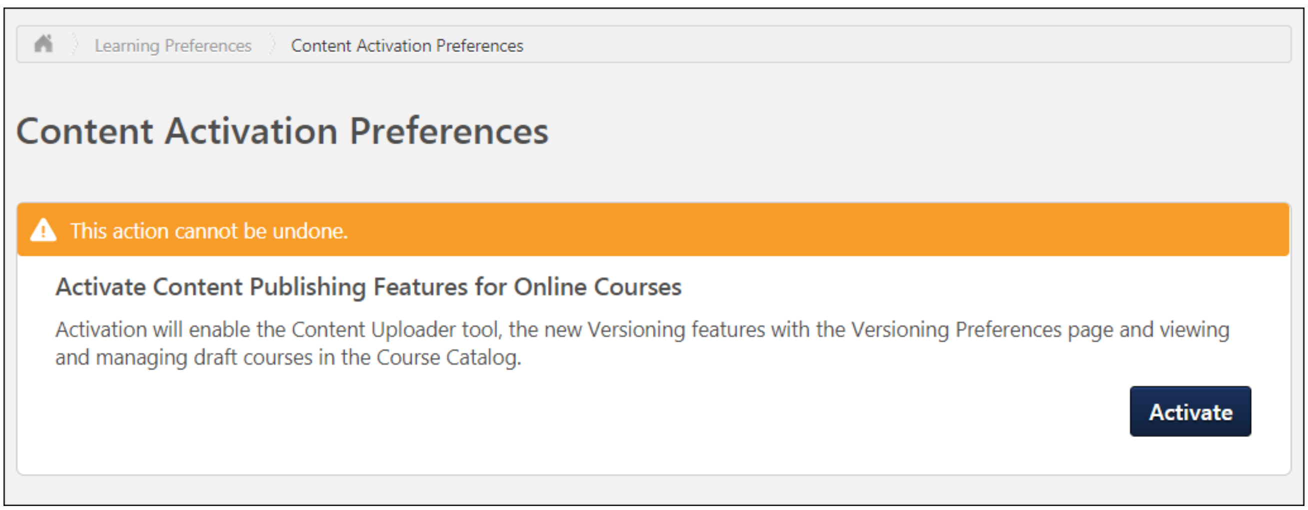
In order for Content Publishing functionality to be accessible in the portal, an administrator must activate it via Content Activation Preferences. Once Content Publishing is activated, the old Course Publisher is deactivated and can no longer be accessed. This action cannot be undone.

Note: *Upgrading to Content Publishing functionality is optional until the August 2018 release. With the August 2018 release, all portals will be automatically upgraded to the Content Publishing features, and the old Course Publishing functionality will be retired.*

To access Content Activation Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES and click the **Content Activation Preferences** link.

Permissions

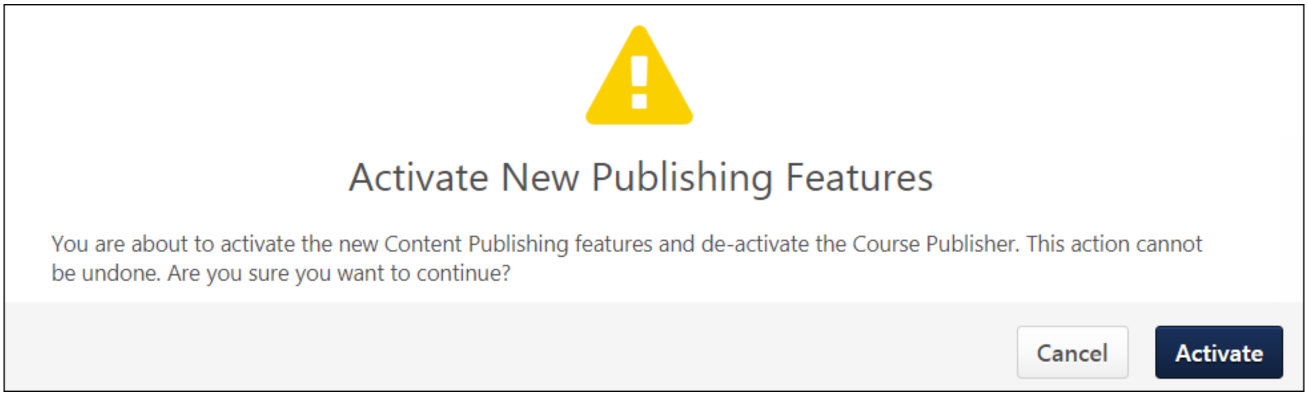
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Content Publishing - Self Activation	Grants access to the Content Activate Preferences page, where an administrator can activate new Learning Features associated with the Content Publishing Features and Online Course Versioning.	Learning - Administration



Activate Content Publishing Features

To activate Content Publishing functionality for online courses in your portal:

1. Click the **ACTIVATE** button on the Content Activation Preferences page. A warning message appears, asking if you are certain you want to activate Content Publishing functionality in the portal.
2. Click the **ACTIVATE** button to complete the activation of Content Publishing features in the portal. Once activated, this functionality cannot be deactivated, and the old Course Publisher is no longer active or accessible. To exit without activating Content Publishing functionality, click the **CANCEL** button.


Activate New Publishing Features
You are about to activate the new Content Publishing features and de-activate the Course Publisher. This action cannot be undone. Are you sure you want to continue?
Cancel
Activate

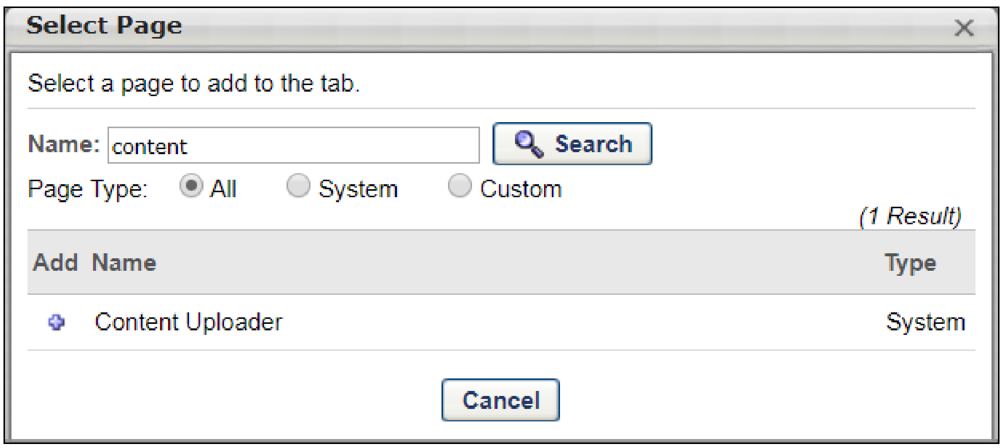
Add Content Uploader to Navigation Tabs

With this enhancement, the Content Uploader can be added as a link under a navigation tab. **Note:** *The Content Uploader link is NOT added automatically to navigation tabs. This must be done manually.*

To manage Navigation Tabs and Links preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > NAVIGATION TABS AND LINKS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.	Core Administration



Navigation Tabs and Links

To add the Content Uploader page to a navigation tab in Navigation Tabs and Links:

1. Click the Add Page icon in the Options column of the navigation tab row. This opens the Select Page pop-up.
2. To add the Content Uploader page as a link under the tab, click the plus icon to the left of the page name in the Add column. This adds the selected page to the bottom of the navigation tab to which the page was added. The page can then be reordered, if necessary, by dragging and dropping it into the appropriate position.
3. Once the Content Uploader link has been added to the page, you can click the Edit icon next to the link to edit the link's title.
4. Click the **SAVE** button at the bottom of the page to save and apply the changes you have made to the navigation tabs and links.

Content Uploader - Upload Files

The Content Uploader page allows administrators to easily upload and track online course files. The Content Uploader page allows administrators to upload multiple course files at one time, view upload statuses, and access the Upload History page. The following Content Uploader sections indicate the current status of the uploaded course files and allow the administrator to take action on the files:

- Upload Files
- Processing
- Needs Provider
- Draft Ready

Note: *If no files meet the criteria for the Processing, Needs Provider, or Draft Ready sections, the section does not display on the page.*

To access the Content Uploader, go to ADMIN > TOOLS > LEARNING and click the **Content Uploader** link.

Permissions

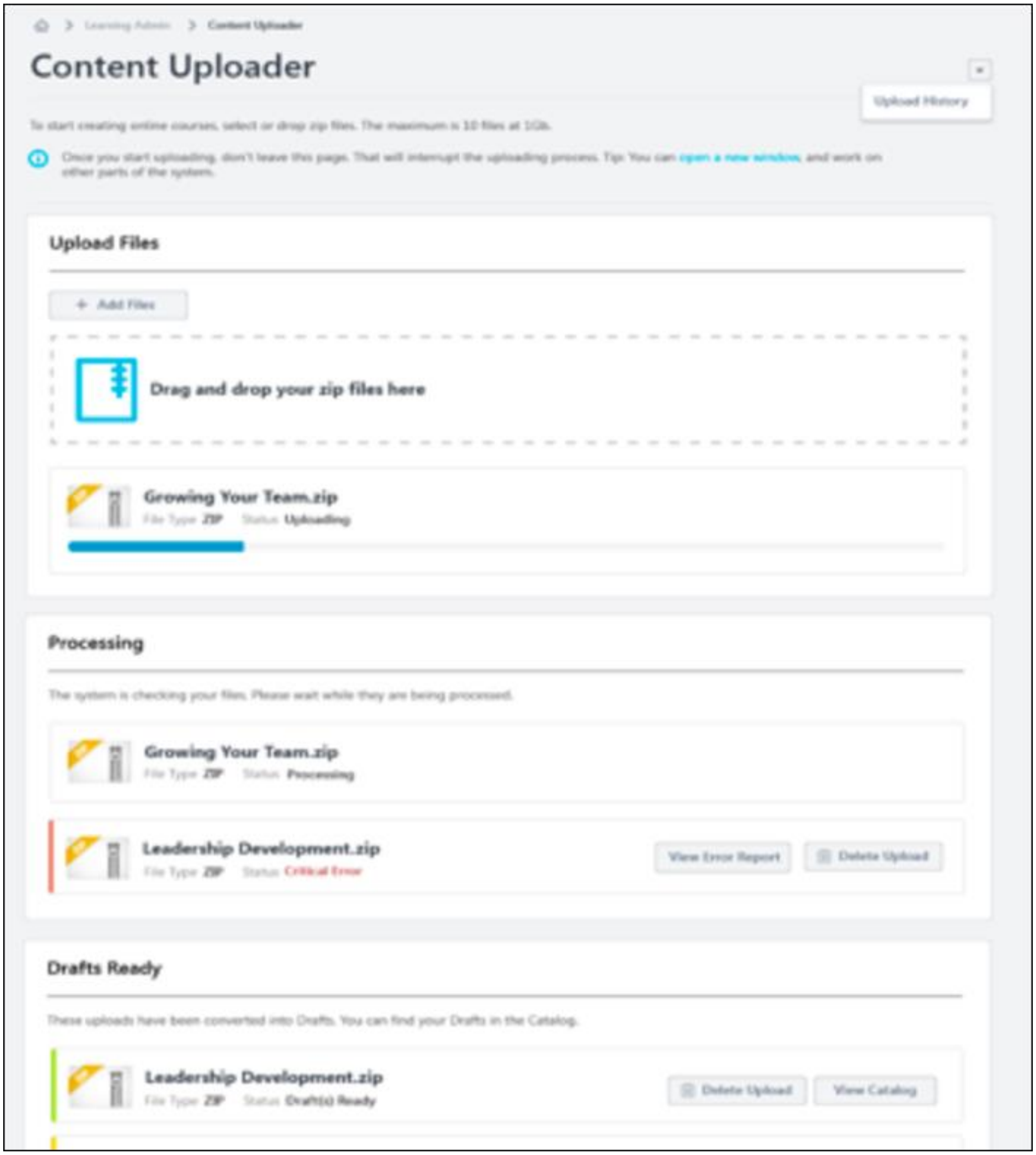
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage/edit learning objects listed in the Course Catalog and also grants access to the Course Console, where LOs can also be managed/edited. This permission also grants access to the Popular Requests and Highest 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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration
Course Catalog - View	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.	Learning - Administration

Online Class - Publish	Grants access to two pieces of functionality: ○ Publish button on the Course Console, allowing administrator to publish a draft online class ○ Upload section of the online class versioning workflow As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration

Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration

Content Uploader - Manage Uploads with Undefined Providers.	Allows administrators to view and manage uploads with undefined providers on the Uploads History page.	Learning - Administration

Upload History - View	Grants ability to view the Upload History page.	Learning - Administration



Options

The **Options** drop-down menu in the upper-right corner of the Content Uploader page allows you to both refresh the page and view the Content Uploader's upload history:

- **Upload History** - Click this link to navigate to the Upload History page. For more information about Upload History, *See* **Upload History** *on* page 172 *for additional information.*
- **Refresh**- Click this link to refresh the page and view updated upload statuses.

Upload Files

To upload a new set of course files:

1. Drag and drop your zipped SCORM or AICC course files into the Upload Files box, or click the **ADD FILES** button and select the zipped course files from your computer. **Note:** *Courses must be zipped into a single zip file. You can upload up to 750 MB per file.*
2. After the course files have been added, they will begin uploading. A progress bar below the files displays the ongoing upload progress for the files. Each set of files displays the following information:
   - File Name
   - File Type
   - Status (i.e. Uploading, Critical Error)
3. If there are problems with the upload, the status changes to Critical Error, and you can click the **VIEW ERROR REPORT** button to view the reasons for the upload errors and address any issues. Once the files successfully finish uploading, they are transferred to the Processing section. Continue managing the upload from the Processing section.

If needed, you can delete a set of course files from the Upload Files section by clicking the **DELETE UPLOAD** button.

Processing

Uploaded files move to the Processing section while the system checks the files for errors.

When a set of course files is transferred to the Processing section, click the Provider drop-down menu and select the provider for the course. After a Provider has been selected, the set of course files moves to the Draft Ready section once processing is completed.

If needed, you can delete a set of course files from the Processing section by clicking the **DELETE UPLOAD** button.

Needs Provider

If the course provider still needs to be selected for the course files after they finish processing, the files appear in the Needs Provider section. Select a course provider from the **Select Provider** drop-down menu. Once a provider is selected, the course files automatically move to the Draft Ready section, and a draft is created automatically in the Course Catalog.

Draft Ready

Once a set of course files moves to the Draft Ready section, its status changes to Uploaded Successfully, and it is available in the Course Catalog as a draft.

Using the Course Catalog, you can configure the metadata for the new online course. Click the **VIEW CATALOG** button to be redirected to the Course Catalog search page, where you can configure the metadata for the course, such as the title, keywords, approval workflows, pricing, and more. When you access the Course Catalog from the Content Uploader page, the Course Catalog is pre-filtered to display only online courses in a Draft status. *See* **Content Publishing Redesign - Course Catalog** *on* page 174 *for additional information.*

If needed, you can archive items in the Draft Ready section by clicking the **ARCHIVE COMPLETED ITEMS** button. Archived courses are then only accessible either via the Upload History page or as draft courses in Course Catalog. You can also delete uploaded files from the Content Uploader by clicking the **DELETE UPLOAD** button.

View Error Report

If a set of course files uploads with errors, you can click the **VIEW ERROR REPORT** button to open a flyout which displays error details. The View Error Report flyout displays for files in upload statuses of both Failed and Completed with Comments.

The View Errors flyout displays the following information:

- Title - The title of the course files.
- Critical Errors section - Displays the severe errors, each on a separate row. Each error displays the following information:
  - Error description
  - File name in which the error occurred
- Warning section - Displays the non-severe errors, each on a separate row.

When finished viewing the error report, click the **DONE** button to close the flyout.

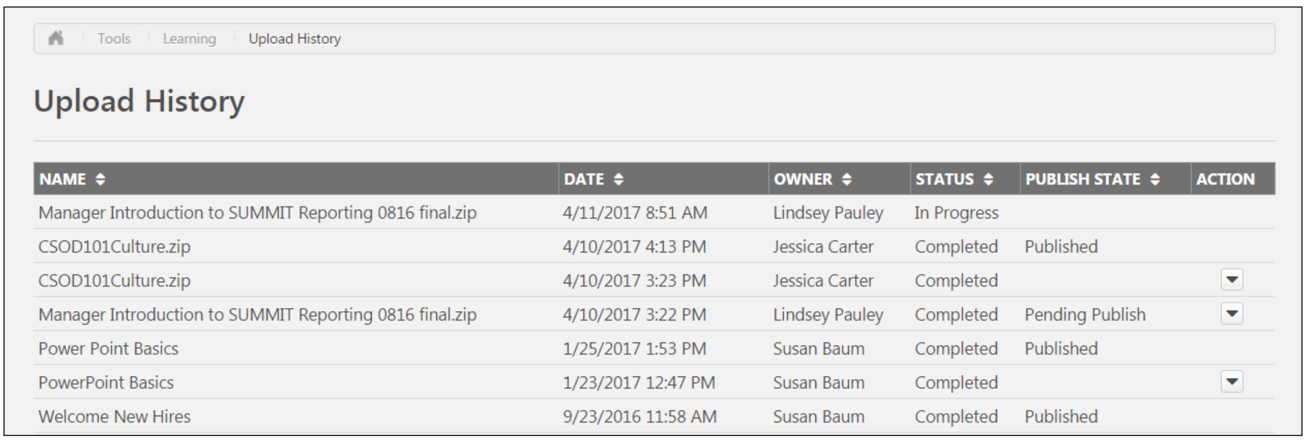
Upload History

The Upload History page provides information about sets of course files which were uploaded to the Content Uploader by the administrators in your system, such as the owner of the files and what status the files are in.

To access the Upload History page, go to ADMIN > TOOLS > LEARNING and click the **Upload History** link. Alternatively, you can access the Upload History page via the **Upload History** link in the **Options** drop-down menu on the Content Uploader page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Content Uploader - Manage Uploads with Undefined Providers.	Allows administrators to view and manage uploads with undefined providers on the Uploads History page.	Learning - Administration
Upload History - View	Grants ability to view the Upload History page.	Learning - Administration


Tools Learning Upload History

Upload History

NAME	DATE	OWNER	STATUS	PUBLISH STATE	ACTION
Manager Introduction to SUMMIT Reporting 0816 final.zip	4/11/2017 8:51 AM	Lindsey Pauley	In Progress		
CSOD101Culture.zip	4/10/2017 4:13 PM	Jessica Carter	Completed	Published	
CSOD101Culture.zip	4/10/2017 3:23 PM	Jessica Carter	Completed		
Manager Introduction to SUMMIT Reporting 0816 final.zip	4/10/2017 3:22 PM	Lindsey Pauley	Completed	Pending Publish	
Power Point Basics	1/25/2017 1:53 PM	Susan Baum	Completed	Published	
PowerPoint Basics	1/23/2017 12:47 PM	Susan Baum	Completed		
Welcome New Hires	9/23/2016 11:58 AM	Susan Baum	Completed	Published	

Upload History

The Upload History page displays the following information for each previously uploaded set of course files:

- **Name** - The title of the uploaded course files
- **Date** - The date the course files were uploaded to the Course Uploader
- **Owner** - The name of the administrator who uploaded the course files
- **Status** - The status of the upload. Available statuses include:
  - In Progress
  - Completed
  - Partially Completed
  - Completed with Comments
  - Failed

- **Publish State** - Displays what stage of the publishing process the course files are currently in. Available publish states include:
  - Pending Publish
  - Published
  - Partially Published
- **Actions** - The Actions drop-down menu next to course files that are Published or Pending Publish allows administrators to take the following actions, if available:
  - Delete
  - View Errors

Note: *You can sort uploads by* **Name**, **Date**, **Owner**, **Status**, *and* **Publish State** *by clicking the column header for the desired sort criteria.*

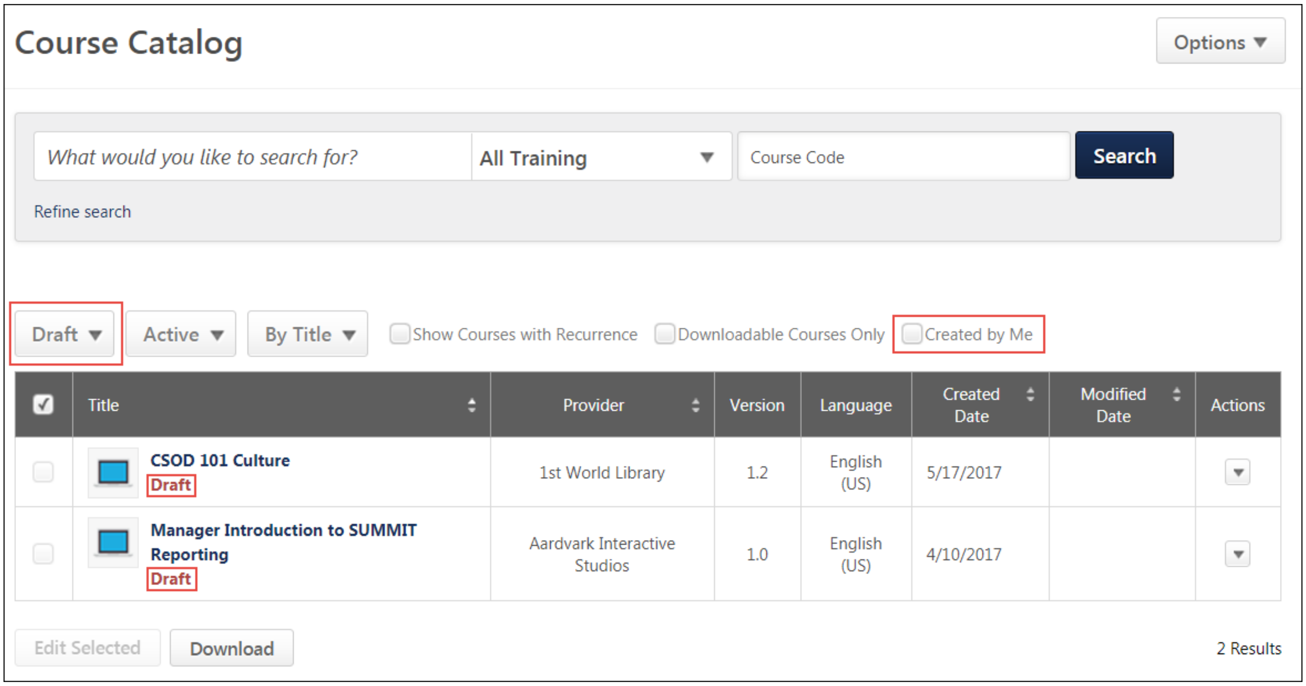
Content Publishing Redesign - Course Catalog

On the Course Catalog page, administrators can filter by online courses in a Draft status and by online courses they created.

To access the Course Catalog, go to ADMIN > TOOLS > LEARNING > CATALOG and click the **Course Catalog** link. Alternatively, you can access the Course Catalog from multiple locations on the Content Uploader page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration
Course Catalog - View	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.	Learning - Administration



Draft

To view only unpublished online courses which are in a Draft status, click the **Status** drop-down filter on the Course Catalog page and select the **Draft** option. The search results will display only unpublished courses, designated as drafts with red **Draft** text below the course title. To publish a draft online course, click the title of the course to navigate to the Course Console page and click the **PUBLISH** button located in the upper right of the Course Console.

Created by Me

To view only training items which were created by you, check the **Created by Me** checkbox which displays above the table of results. The search results will refresh to display only training for which you are the creator.

When you click the **VIEW CATALOG** button from Content Uploader page, the **Created by Me** filter is automatically applied to the Course Catalog page.

Content Publishing Redesign - Course Console

With this enhancement, several new features related to Content Publishing have been added to the Course Console. Using the Course Console, administrators can do the following:

- Reversion an online course
- Modify an online course
- Resume an in-progress file upload during the versioning and modification workflows
- View modification history
- Select the **Allow Download** option

To access the Course Console, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link. Find the online course in the Course Catalog and then click on the course title.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration
Course Catalog - View	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.	Learning - Administration
Online Class - Modify	Grants ability to modify an online class without creating a new version of the online class.	Learning - Administration

Online Class - Publish	Grants access to two pieces of functionality: ○ Publish button on the Course Console, allowing administrator to publish a draft online class ○ Upload section of the online class versioning workflow As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration

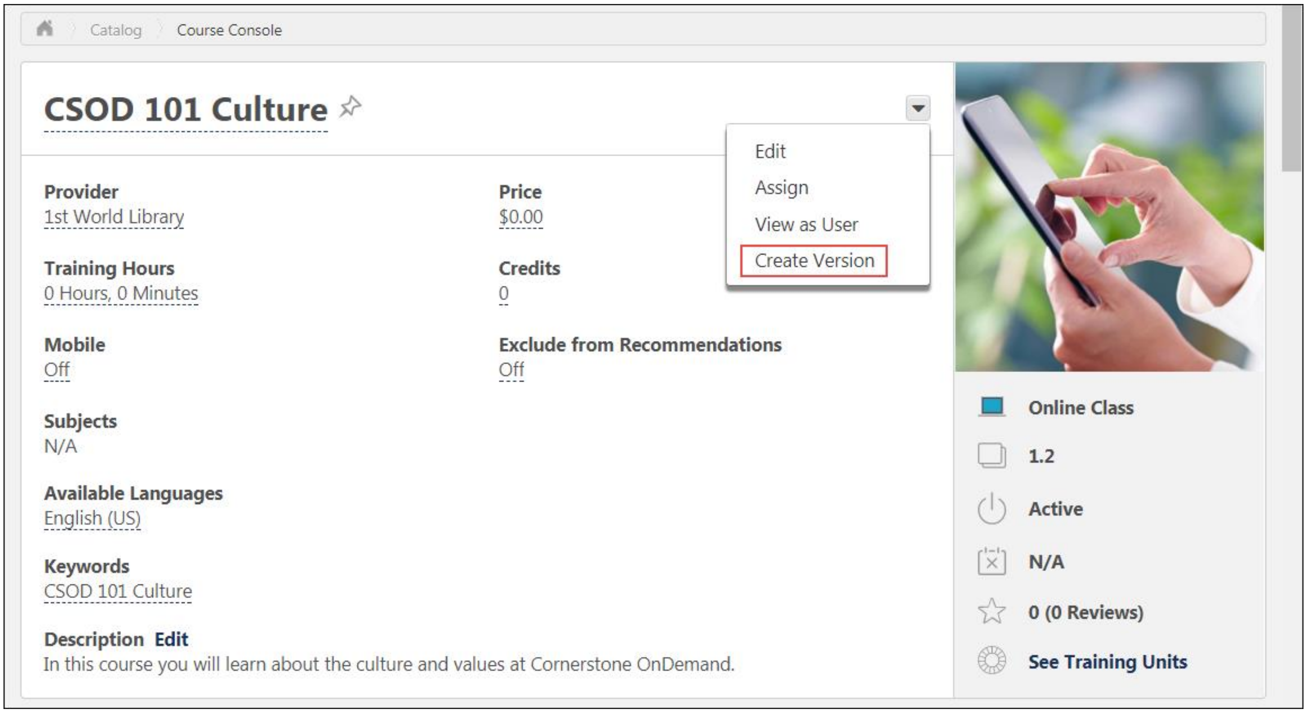
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration

Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission. As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration

Reversion an Online Class

If the administrator needs to make a major change to an online class, they can begin reversioning the class via the Course Console page. To begin the process, click the **Options** drop-down menu to the right of the online class title and click the **Create Version** link.

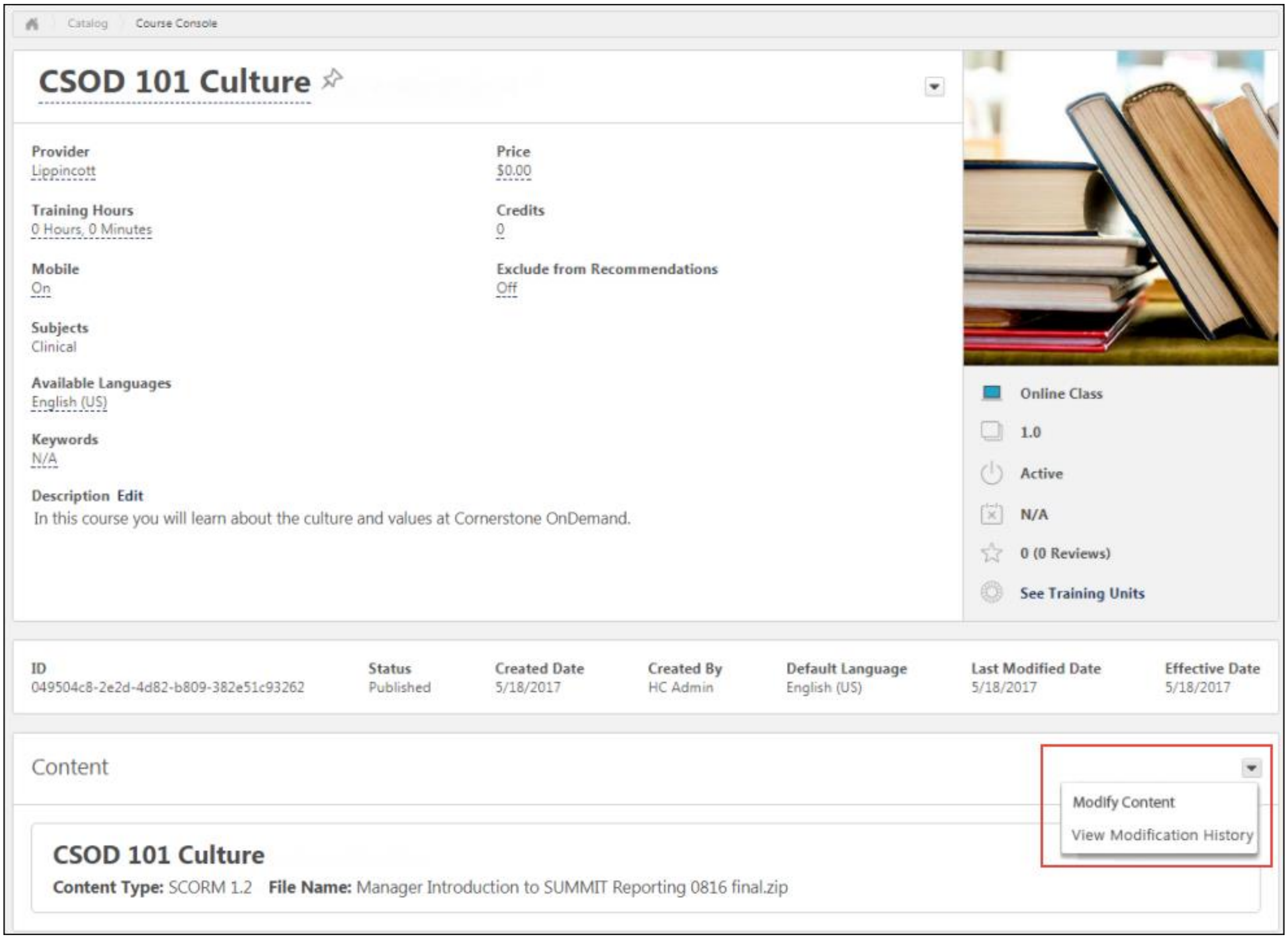
See **Upload New Version of Online Course** *on* page 190 *for additional information.*



Modify an Online Course

If an administrator needs to make small changes to the course files of an online class, and the replacement files are in the same file structure as the original course files, the administrator can begin modifying the online course from the Course Console page. In the **Options** drop-down menu in the upper-right corner of the Content section, there is a **Modify Content** link, which begins the modification process.

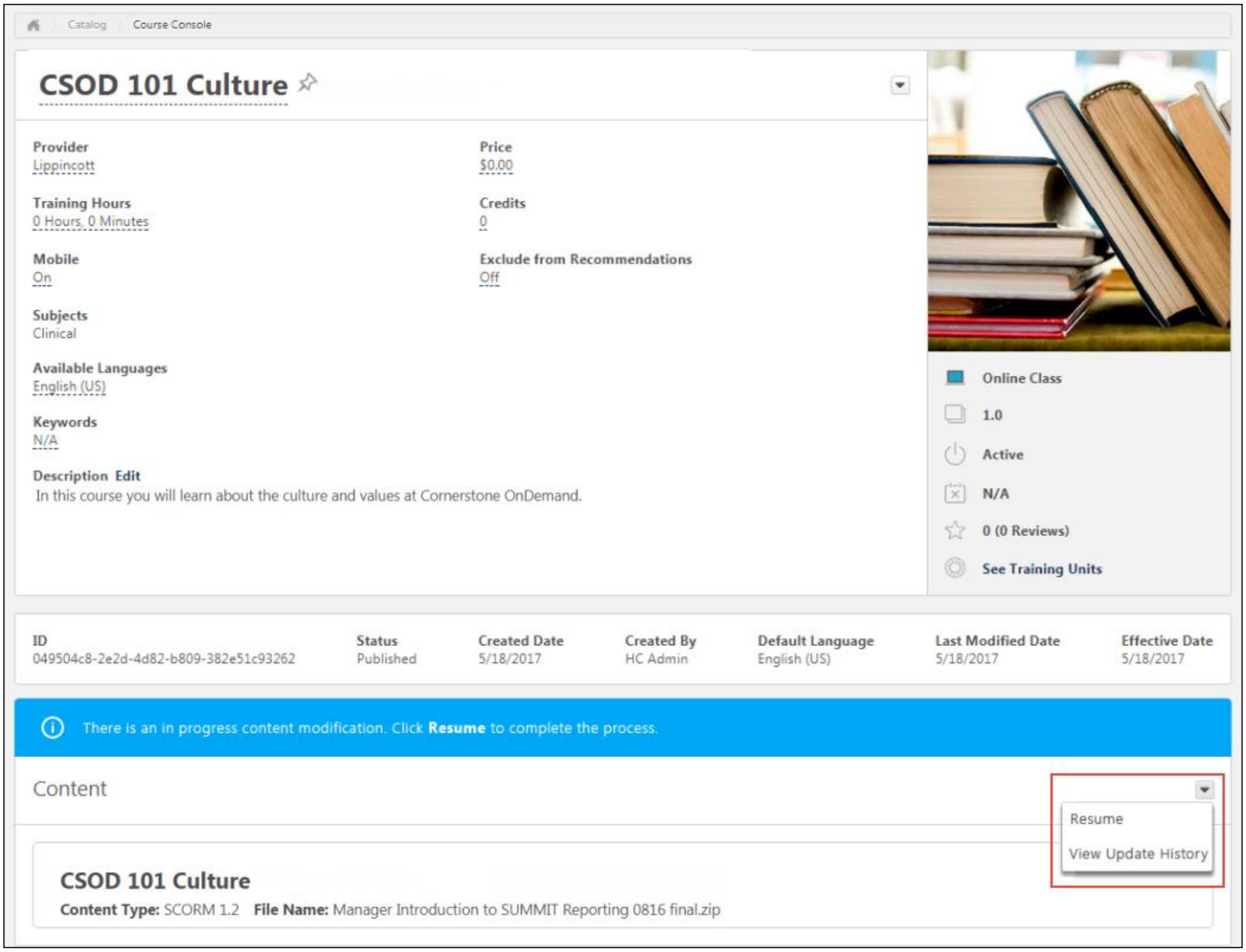
See **Modify an Online Course** *on* page 212 *for additional information.*



Resume Upload

If an administrator began modifying an online class but the uploaded replacement files are still present on the Modify Content page for the online class, when an administrator accesses the Course Console page for the class, a notification displays in the Content section alerting the administrator to the in-progress content modification. The administrator can click the **Options** drop-down menu in the upper-right corner of the Content section and click the **Resume** link to resume the modification process.

See **Modify an Online Course** *on* page 212 *for additional information.*



Modification History

In the Content section of the Course Console page for an online course, the **Options** drop-down provides access to the Modification History page. When the View Modification History link is clicked, the Modification History flyout appears. *See* **Modification History** *on* page 181 *for additional information.*

Allow Download

If the online course should be available for users to download, the administrator can click the **Allow Download** link from the **Options** drop-down menu.

Modification History

In the Content section of the Course Console page for an online course, the **Options** drop-down provides access to the Modification History page. When the **View Modification History** link is clicked, the Modification History flyout appears. The Modification History flyout displays separate tile for each instance of course modification. Each tile displays the following information:

- **Title**
- **Date of Modification**
- **Username** of the user who modified the online course
- **Options** drop-down menu - Clicking the **Options** drop-down opens the File List flyout. The File List flyout displays the following information:
    - Title - The title of the course
    - Back - Clicking this link returns the user to the Modification History flyout
    - Date of Modification
    - Username of the user who modified the online course
    - File Name - The name of the uploaded course files
    - Action - Whether the course files were updated or deleted
    - File Size

Reversion vs. Modify an Online Course

There are two ways to make updates to an online course. When an online course requires updates, the administrator can either reversion the course or modify the course:

- Reversion - Reversioning a course creates a new version of the online course, with a new version number.
- Modify - Modifying a course allows administrators to make minor modifications to an online course WITHOUT creating a new version.

When should you reversion a class vs. modify a course?

ONLINE CLASS UPDATE METHOD	TYPE OF UPDATE
Reversion	The reversioning process is the appropriate choice for major changes to an online class, and administrators can control who receives the new version of the online class.
Modify	The online class modification process allows administrators to make minor updates to an online class without creating a new version. Within the old Course Publisher functionality, the process similar to modifying a class is referred to as "Replace Files."

Online Course Update Scenarios

EXAMPLES OF NEEDED CHANGES	MAJOR OR MINOR?	APPROPRIATE UPDATE METHOD	USE CASES
The following changes are examples of major online course changes which require you to reversion the course: ○ Replacing a segment of the course ○ Making substantive updates to the course content ○ Modifying the course structure, such as by adding or removing a SCO (Sharable Content	Major Changes	Reversion the online course	Holly, an instructional designer and learning administrator at Ventonix, is responsible for creating online coursesand uploading them to her organization's portal. Following a quarterly release, Holly needs to update a collection of online courses about Ventonix's product in order to keep the courses up-to-date. She needs to replace the quizzes in two classes, add

EXAMPLES OF NEEDED CHANGES	MAJOR OR MINOR?	APPROPRIATE UPDATE METHOD	USE CASES
Object) ○ Adding or removing a quiz ○ Removing or adding resources such as audio, video, animations, pdfs, etc. **Note:** *This list of examples is not an exhaustive list of changes which necessitate a new online course version. Any update which causes a change to the course file size, type, or file structure forces you to reversion the online course.*			a few lines of audio to one course, and add sections to two more courses. Once Holly makes all these changes to her online courses, each class' files structure is changed from its original structure and she is required to reversion each of the five courses. She uses the Create Version option on the Course Console pages for the courses, uploads her new course files, configures versioning options, and decides who will receive the new course versions on their transcripts, ensuring that people continue to receive accurate information from the online course collection.
The following changes are examples of minor online course changes which can be accomplished using the option to modify the course: ○ Fixing typos in the online course closed captioning ○ Removing background noise from an audio clip ○ Making minor edits to a slide's graphics or text **Note:** *This list of examples is not an exhaustive list of changes which allow you to use the Modify Content*	Minor Changes	Modify the online course	Andy, an instructional designer and learning administrator at ACME Corp, is responsible for creating online courses and uploading them to the portal. He has just noticed a typo in the closed captioning text for one of the slides in his Employee Benefits online course. He wants to quickly fix this minor typo without having to create a whole new version of the online course.

EXAMPLES OF NEEDED CHANGES	MAJOR OR MINOR?	APPROPRIATE UPDATE METHOD	USE CASES
process instead of reversioning the online course. A modification is qualified as a minor change if the course files are the same size and type as the original set, and the file structure is the same (i.e. contains the same number of SCOs) **Note:** *Any changes made to the metadata of the online course via the Course Catalog or Course Console, such as description, keywords, and subjects, DO NOT trigger a new version of the class.*			Andy incorporates the fix into his course files and then navigates to the Course Console for the course and clicks the **Modify Content** option in the Content section. He is then able to upload his zipped files and seamlessly fix the course typo without generating a new version.

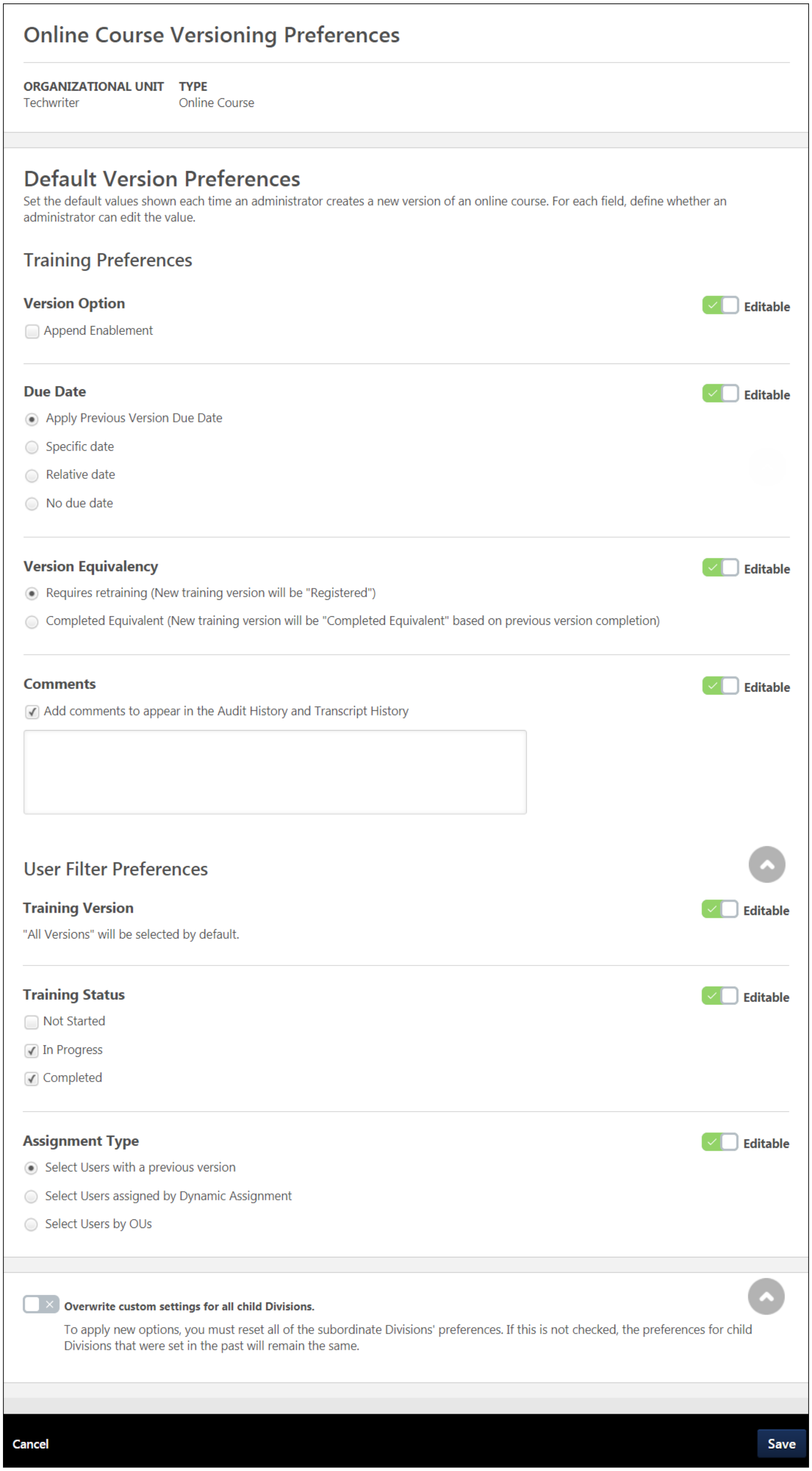
Online Course Versioning Preferences

Administrators can set default options for the online course versioning process and specify whether these options are editable via the Online Course Versioning Preferences page.

To set online course versioning preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES and click the **Online Course Versioning Preferences** link. Online course versioning preferences are set by division, so choose the division for which you want to set preferences.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Online Class Versioning Preferences	Grants ability to set default options for the online class versioning process. This is an administrator permission.	Learning - Administration


Online Course Versioning Preferences
ORGANIZATIONAL UNIT
Techwriter
TYPE
Online Course
Default Version Preferences
Set the default values shown each time an administrator creates a new version of an online course. For each field, define whether an administrator can edit the value.
Training Preferences
Version Option
Editable
Append Enablement
Due Date
Editable
Apply Previous Version Due Date
Specific date
Relative date
No due date
Version Equivalency
Editable
Requires retraining (New training version will be "Registered")
Completed Equivalent (New training version will be "Completed Equivalent" based on previous version completion)
Comments
Editable
Add comments to appear in the Audit History and Transcript History
User Filter Preferences
Training Version
Editable
"All Versions" will be selected by default.
Training Status
Editable
Not Started
In Progress
Completed
Assignment Type
Editable
Select Users with a previous version
Select Users assigned by Dynamic Assignment
Select Users by OUs
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.
Cancel
Save

Online Course Versioning Preferences

The Online Course Versioning Preferences page allows you to set default training and user filter preferences for online classes that are reversioned in the portal. At the top of the Online Course Versioning Preferences page, the organizational unit (OU) for which you are setting preferences displays, along with the training type you are setting preferences for.

Training Preferences

In the Training Preferences section, set default values for the following training reversioning fields:

- **Version Option** - In this section, set default versioning options:
  - Append Enablement - Checking this option allows two versions of the online course to exist in the portal at the same time. Both versions can be assigned to users. For more information about append versioning behavior, *See* **Append Versioning Behavior** *on* page 203 *for additional information.*
- **Due Date** - In this section, select a default due date option for reversioned courses. Available options include:
  - Apply Previous Version Due Date
  - Specific Date
  - Relative Date
  - No Due Date
- **Version Equivalence** - In this section, choose a default equivalence option for reversioned training. Available options include:
  - Requires retraining (New training version will be "Registered")
  - Completed Equivalent (New training version will be "Completed Equivalent" based on previous version completion)
- **Comments** - In the Comments text box, enter any text that should appear by default in the Audit History and Transcript History for the reversioned course.

If any of the above fields should NOT be editable by administrators who are reversioning online courses, toggle the Editable switch to the Off position. The default options you have selected on this page will be selected when other users reversion online courses, and these options will be read only. By default, all fields in this section are configured as editable.

User Filter Preferences

- **Training Version** - By default, the All Versions option is selected when an administrator reversions an online course. Administrators are allowed to change these selections unless this default is configured to be non editable.
- **Training Status** - In this section, select which training statuses will be replaced or appended by the new version of an online course. *See* **Online Course Versioning - Training Status Equivalents** *on* page 189 *for additional information.*. Available statuses include:
  - Not Started
  - In Progress
  - Completed

- **Assignment Type** - In this section, select which assignment option will be selected by default. Available options include:
  - Select Users with a previous version - All users will be selected by default
  - Select Users assigned by Dynamic Assignment - All users who were assigned the course via dynamic learning assignment or via dynamic recurring reassignment are selected
  - Select Users by OUs - No users are selected by default, and the administrator must select specific organizational units (OUs) which will receive the new online course version

Overwrite Settings

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

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

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

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

Save

Click the **SAVE** button at the bottom of the page to save and apply your preference settings.

Online Course Versioning - Training Status Equivalents

Depending on the administrator's training status selections when reversioning an online class, users with the previous version of the class in statuses of Not Started, In Progress, and Completed, and statuses equivalent to these statuses, can automatically receive the new version.

The following statuses are treated as equivalent to Not Started when an online course is reversioned:

- Registered,
- Registered/Past Due
- Registered/Not Available
- Registered/Not Available/Past Due
- Approved
- Approved/Past Due
- Pending Prerequisite
- Pending Prerequisite/Past Due

The following statuses are treated as equivalent to In Progress when an online course is reversioned:

- In Progress
- In Progress/Past Due
- Pending Observer Completion
- Pending Observer Completion/Past Due
- Pending Completion Approval
- Pending Completion Approval/Past Due
- Pending Evaluation
- Pending Evaluation/Past Due
- Pending Acknowledgment
- Pending Acknowledgment/Past Due
- Pending Pre-work
- Pending Pre-work/Past Due
- Pending Post-work
- Pending Post-work/Past Due
- Pending Completion Signature
- Pending Completion Signature/Past due

The following statuses are treated as equivalent to Completed when an online course is reversioned:

- Completed
- Completed Equivalent
- Exempt

Upload New Version of Online Course

In Stage portals with the Content Publishing features enabled, a new version of an online course can be initiated from the Course Console page. This simple online course versioning process allows administrators to quickly and easily create new class versions and define the behavior of new and previous versions. With the new Create Version functionality available from the Course Console, the following are possible:

- Two online class versions can be appended
- Users searching for training in the system can search for both active versions of the online course. *See* **Content Publishing Redesign - Search for Online Courses** *on* page 219 *for additional information.*
- Curricula containing the reversioned online course are automatically updated. *See* **Content Publishing - Curricula Auto Reversioning** *on* page 206 *for additional information.*
- Users who receive the new online course version can be precisely selected
- Version Completion equivalency between can be defined and deleted via the Course Console

Once a new online course version is initiated, the online class versioning process consists of two steps:

- Training Content
- Versioning Options

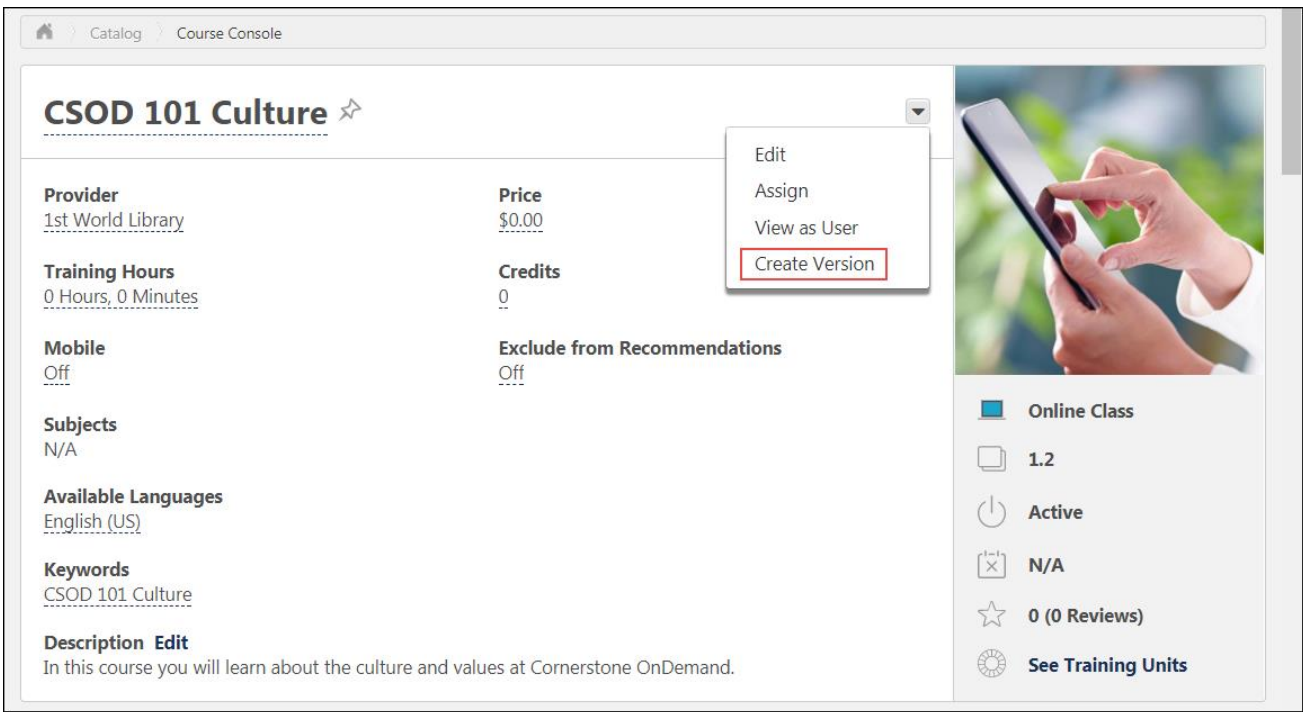
To create a new version of an online course, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link. Find the online course in the Course Catalog and then click on the course title.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration

Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration

Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission. As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration



Create Version

To begin creating a new version of an online course:

1. Click the **Options** drop-down menu to the right of the online course title on the Course Console page for the course.
2. Click the **Create Version** link. This initiates the two step process for versioning an online course. For detailed information about each step, click the help links below:
3. Training Content - *See* **Create Version - Training Content** *on* page 193 *for additional information.*
4. Versioning Options - *See* **Create Version - Versioning Options** *on* page 196 *for additional information.*

Create Version - Training Content

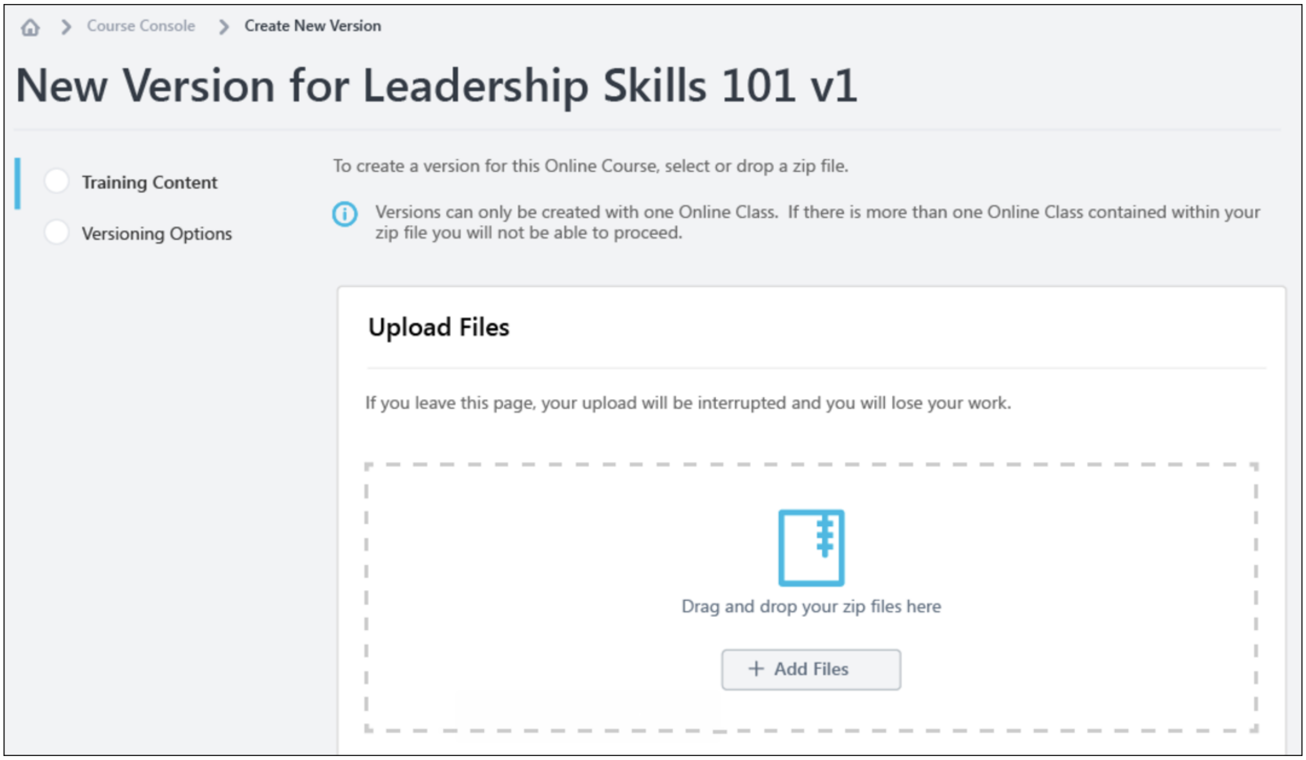
During the first step of creating a new version of an online course, upload the new course files.

To create a new version of an online course, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link. Find the online coursein the Course Catalog and then click the course title. From the Course Console page, click the **Options** drop-down menu and click the **Create Version** option.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration
Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission.	Learning - Administration

	As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	



Training Content

Upload Files

To upload a new set of course files:

1. Drag and drop your zipped SCORM or AICC course files into the Upload Files box, or click the **ADD FILES** button and select the zipped course files from your computer. **Note:** *Courses must be zipped into a single zip file. You can upload up to 750 MB per file.*
2. After the course files have been added, they will begin uploading. Click the **REFRESH STATUS** button to view the most current status of the upload. A progress bar below the files displays the ongoing upload progress for the files. Each set of files displays the following information:
   - File name
   - File Type
   - Status (i.e. Uploading, Critical Error)
3. If there are problems with the upload, the status changes to Critical Error, and you can click the **VIEW ERROR REPORT** button to view the reasons for the upload errors and address any issues. *See* **View Error Report** *on* page 171 *for additional information.*. Note: You cannot use content that is uploaded with a critical error, but you can use content that is uploaded with errors. Once the files successfully finish uploading, they

are transferred to the Processing section. Continue managing the upload from the Processing section.

Note: *It is recommended that you always preview your uploaded files to ensure the new version will play as expected once published.*

Training Information

Once the files have finished uploading, you can preview the course by clicking the **PREVIEW** button next to the files. If needed, you can delete the files and upload a new set of course files by clicking the Delete icon. If the course previews as expected, populate the following fields for the new version of the course:

- **Training Title** - Enter the title for the new online course version. By default, the title for the previous course version is populated. This field is required.
- **Training Description** - Enter the description for the new online class version. Formatting options are available for the training description. By default, the description for the previous course version is populated. This field is limited to 5000 characters.
- **Training Hours** - Enter the number of training hours received for completion of the online course. The training hours from the manifest of the new version populate in this field automatically.
- **Provider** - This field displays the provider of the online course. This field is read-only and is automatically populated from the original course version.
- **Enable for Mobile App** - Choose the **Yes** option to enable this online class version for the mobile app. Choose the **No** option if the online course should not be available through the mobile app.

Note: *Clicking the* **Preview** *option will erase any edits made to the Training Information section. Always preview the uploaded BEFORE editing the Training Information.*

Save and Cancel

Once ready to proceed to the next step in the online course versioning process, click the **SAVE** button and continue to the Versioning Options page. *See* **Create Version - Versioning Options** *on* page 196 *for additional information.*

To leave this page without saving any uploads or selections you have made, click the **CANCEL** button.

Considerations

- If an upload is currently in progress for the online course when an administrator navigates to the Course Console page, a notification displays at the top of the Content section, alerting them to the in progress upload. If the administrator wishes to view the in progress upload, they can click the **RESUME** button which displays in the notification. This directs the administrator to the versioning workflow. To resume the upload, click the **RESUME UPLOAD** button.

Create Version - Versioning Options

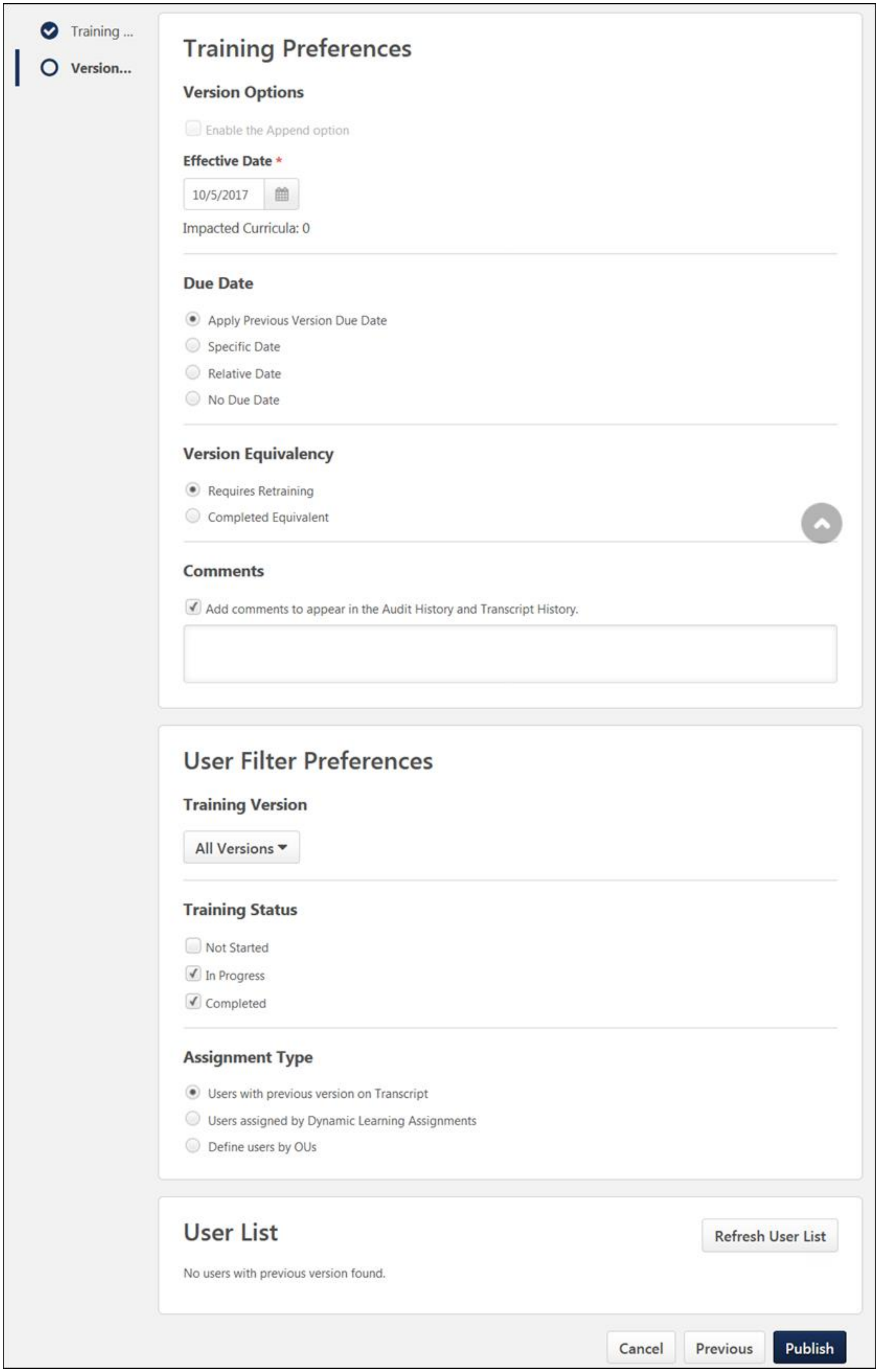
On the second step of reversioning an online course, select versioning options. Default options for this page are configured via Online Course Versioning Preferences, and may be configured as read-only by the administrator. *See* **Online Course Versioning Preferences** *on* page 185 *for additional information.*

To create a new version of an online course, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link. Find the online course in the Course Catalog and then click the course title. From the Course Console page, click the **Options** drop-down menu and click the **Create Version** option.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Standard and Dynamic	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Assignment Tool - Standard and Dynamic - Recurrence	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. Also grants ability to enable/disable Recurrence when creating a Dynamic Learning Assignment. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Course Catalog -	Grants ability to manage/edit learning objects listed in the Course Catalog and also grants access to the Course	Learning - Administration

Update	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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration
Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission. As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	Learning - Administration


Training ...
Version...
Training Preferences
Version Options
Enable the Append option
Effective Date *
10/5/2017
Impacted Curricula: 0
Due Date
Apply Previous Version Due Date
Specific Date
Relative Date
No Due Date
Version Equivalency
Requires Retraining
Completed Equivalent
Comments
Add comments to appear in the Audit History and Transcript History.
User Filter Preferences
Training Version
All Versions
Training Status
Not Started
In Progress
Completed
Assignment Type
Users with previous version on Transcript
Users assigned by Dynamic Learning Assignments
Define users by OUs
User List
Refresh User List
No users with previous version found.
Cancel
Previous
Publish

Versioning Options

Select Training Preferences and User Filter Preferences options for the online course version, if editable.

Training Preferences

In the Training Preferences section, configure the following versioning options:

Version Option - In this section, define the criteria for upgrading users and decide who should be upgraded:

- **Append Enablement** - Checking this option allows two versions of the online course to exist in the portal at the same time. Both versions can be assigned to users. If this option is enabled, the version uses the Append option, meaning it will require a start date and allow two versions of the same online course to be available at the same time on users' transcripts. If not selected, the new course version replaces the previous version on the effective date. The previous version becomes the old version or expires. For more information about append versioning behavior, *See* **Append Versioning Behavior** *on* page 203 *for additional information.*

- **Effective Date** - Select the date that the new online course version will be effective in the system.
- **Start Date** - Select the date that the new online course version can be started by users. This option is only available if **Append Enablement** has been selected.
- **Impacted Curricula** - This field displays the number of curricula that are impacted by the online course reversioning. This number is clickable and opens a flyout which displays each impacted curriculum title, description, and versions.
- **Due Date** - In this section, select a due date option for reversioned courses. Available options include:
  - **Apply Previous Version Due Date** - The following behaviors result from this selection:
    - If the online course is standalone, the previous version's due date is applied
    - If the online course is within a curriculum, the new class version does not display a due date in its structure.
  - **Specific Date** - The following behaviors result from this selection:
    - If the online course is standalone, the new version receives a fixed due date.
    - If the online course is within a curriculum, the new class version displays a fixed date in its structure.
  - **Relative Date** - The following behaviors result from this selection:
    - If the online course is standalone, the new version receives a relative due date.
    - If the online course is within a curriculum, the new class version displays a relative due date in its structure.
  - **No Due Date** - The following behaviors result from this selection:

    - If the online course is standalone, the new version receives the previous version's due date.
    - If the online course is within a curriculum, the curriculum due date for the original version is also applied to the new version within the curriculum structure.
- **Version Equivalency** - In this section, choose an equivalence option for reversioned training. Available options include:
    - Requires retraining (New training version will be Registered)
    - Completed Equivalent (New training version will be Completed Equivalent based on previous version completion)
- **Comments** - In the Comments text box, enter any text that should appear in the Audit History and Transcript History for the reversioned course.

All of the options listed above will have default selections, as configured by an administrator via the Online Course Versioning Preferences page. Some options may be read-only if the administrator chose not to allow modification of any or all versioning options.

User Filter Preferences

In the User Filter Preferences section, configure the following user filter options, to determine which users receive the new version:

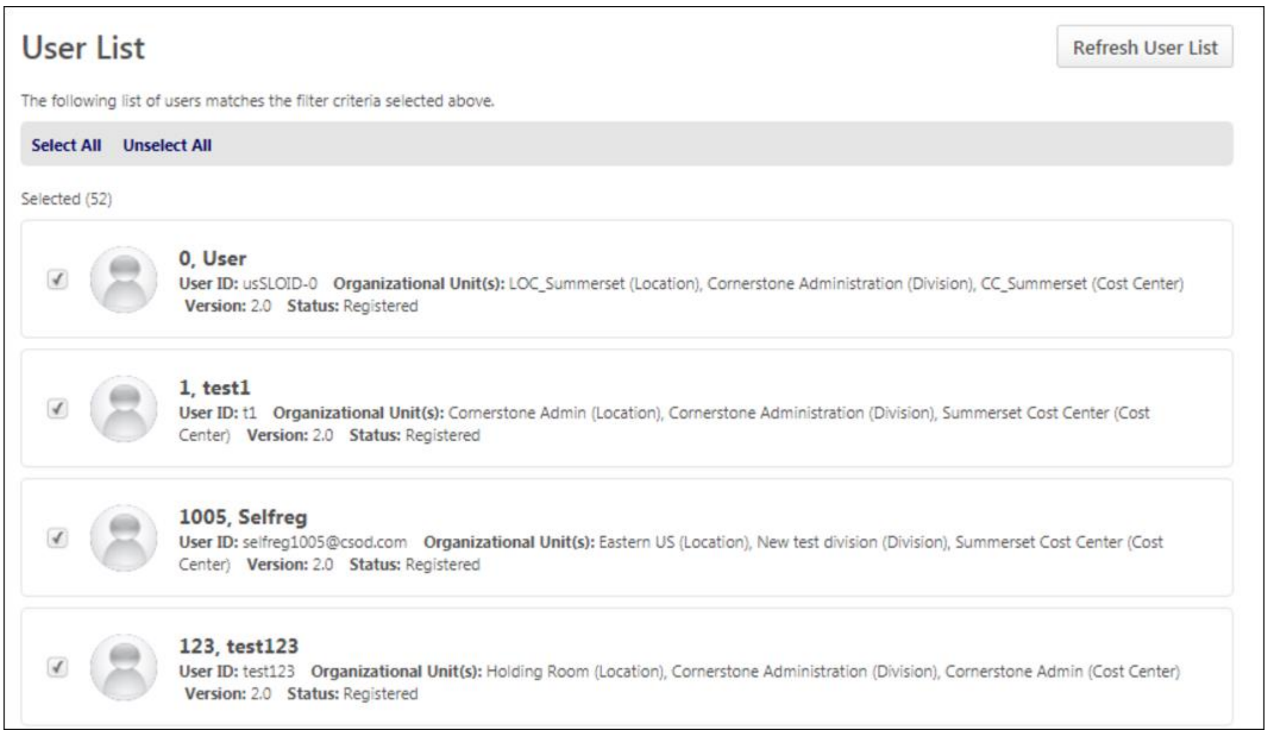
- **Training Version** - This drop-down filters the users according to the version of the course in which they are currently enrolled. The list of versions displays the current versions available on the users' transcripts. This enables administrators to easily assign the new online course version to users who are currently enrolled in a specific version of the course. Administrators can select one of the existing versions of the course or all versions. For example, if All Versions is selected, then users who have any version of the course on their transcript are displayed in the User List section.
- **Training Status** - In this section, select which training statuses will be replaced or appended by the new version of an online course. *See* **Online Course Versioning - Training Status Equivalents** *on* page 189 *for additional information.* Available statuses include:
    - Not Started
    - In Progress
    - Completed
- **Assignment Type** - In this section, select which users receive new versions of an online course. Available options include:
    - **Select Users with a previous version** - Selecting this option includes all users, regardless of the assignment method (Requested, assigned, or via learning assignment)
    - **Select Users assigned by Dynamic Assignment** - Selecting this option only includes users who were dynamically assigned the course. Permissions for dynamic and dynamic recurring learning assignments and their associated constraints apply to this option.

- **Select Users by OUs** - This option allows the administrator assign the new version to specific organizational units (OUs), such as divisions, locations, groups, etc. If no OUs are selected, then no users receive the new version.

User List

The User List section displays users who have a version of the online course on their transcript. The users that display in the user list are controlled by the constraints applied to the permission for publishing online course versions.

If you make any changes to the User Filter Preference selections in the section above, click the **REFRESH USER LIST** button to view an updated user list. To remove any user from the user list and prevent them from receiving the new version of the online course, uncheck the box next to the user's name. **Note:** *This option is not available if the Effective Date is in the future. The system automatically recalculates the users impacted from the filter selection when the version becomes effective.*

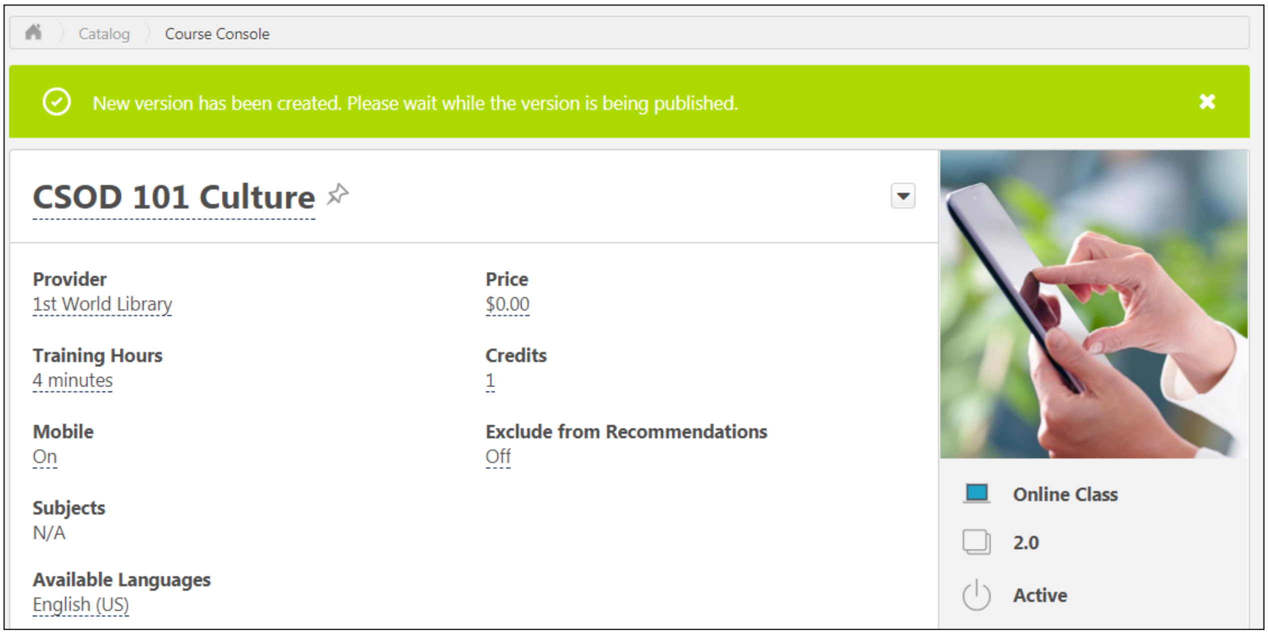


Publish

After configuring all versioning options and verifying that the user list applies to the number of users expected, click the **PUBLISH** button to publish the new online course version, which will be applied to users as specified in the User Filter Preferences section. After clicking the **PUBLISH** button, you are redirected to the Course Console page for the online course, and a notification displays at the top of the page, stating, "New version has been created. Please wait while the version is being published."

When the new version is successfully published, the version number and the Last Modified Date are updated on the Course Console page, and the new online course version is active in the portal. Further modifications to the online course can be made on the Course Console page and via Course Catalog. **Note:** *When the online course is reversioned, all metadata from the original course is copied to the new version EXCEPT for the following:*

- *Pricing - Prices must be configured for the new version.*
- *Approval Workflows - Any applicable approval workflows must be configured for the new version.*
- *Training Equivalencies - Any applicable training equivalencies must be configured for the new version.*



To return to the previous page in the online course versioning process, you can click the **PREVIOUS** button. To exit the process without saving the uploaded files or any options, click the **CANCEL** button.

Append Versioning Behavior

Using the **Append** option when reversioning an online course, two versions of an online course can be active at a time. **Note:** *No more than two versions can be in a Published status at once.*

When an online course is reversioned with the Append option enabled, the new version exhibits the following behaviors:

- Users can have two active versions of the online course on their transcripts, depending on the options selected by the administrator during the reversioning process.
- Two versions of the online course may be included in curricula containing the online course. *See* **Content Publishing - Curricula Auto Reversioning** *on* page 206 *for additional information.*
- The Effective Date is either immediate or in the future, depending on the options selected by the administrator who reversioned the course. Users only receive the new version when the effective date is reached.
- The Start Date for the online course can be left blank when reversioning an online course, but needs to be populated in order to deactivate the previous version.
- The new version of the online course is active in the portal either until its end date.

Use Case - Two Versions on User's Transcript

Sylvia is an administrator, and she is responsible for all compliance training at ACME Inc. On August 15, 2017, Sylvia receives an email from the Chief Compliance Officer informing her that a new factory procedure for 2018 is available. All employees working in the factory should be able to start being trained on September 1, 2017, as the new procedure will be effective on January 1, 2018. The same factory procedure for 2017 should also be available until December 31, 2017.

Sylvia creates a new version of the Factory Procedure for 2017 using the online class Create Version functionality. She uses the Append option because she wants two versions of the class to be available on users' transcripts at the same time. Sylvia alsoadds an Effective Date of January 1, 2018 for the new procedure. She then assigns the new version to all employees at ACME Inc. who have the previous version of the course on their transcript. The Factory Procedure for 2017 will be automatically deactivated when the Factory Procedure for 2018 starts.

John is working in the factory at ACME Inc. He sees the 2017 and the 2018 version of the Factory Procedure on his transcript. John can access both versions of the procedure from September 1, 2017 until January 1, 2018. On January 1, 2018, only the 2018 version is available.

Append Versioning Behavior with the Learning Assignment Tool

When an online course assigned via the Learning Assignment Tool has been reversioned and appended, the following learning assignment behaviors apply:

- If there are two active versions of an online course in a learning assignment, both are assigned to users.

- If a user has two active versions of an online course assigned via a learning assignment, and the user leaves the criteria for the assignment, both course versions are removed when Dynamic Removal is enabled for the assignment. If the user later meets the assignment criteria again, both versions are reassigned to the user.

SCENARIO	ASSIGNMENT BEHAVIOR
Version 1 is active, and the administrator is assigning Version 1 via the Learning Assignment Tool (LAT).	Version 1 is assigned to users.
Version 1 and Version 2 of the online course are active, and the administrator is assigning Version 1 via the LAT.	Version 1 AND Version 2 are assigned.
Version 1 and Version 2 of the online course are active, and the administrator is assigning Version 2 via the LAT.	Version 1 AND Version 2 are assigned.
Version 2 and Version 3 of the online course are active, and the administrator is assigning Version 1.	Version 2 and Version 3 are assigned.
The administrator creates an assignment with two active versions (Version 2 and Version 3), and assigns both versions with the Assign New Occurrence option.	Both Version 2 and Version 3 are assigned as new occurrences on users' transcripts.
Version 1 and Version 2 are active, and Version 1 is already on users' transcripts. The administrator assigns Version 1 with the Assign New Occurrence option.	Version 1 is assigned as a new occurrence, and users are also assigned Version 2.
Version 1 and Version 2 are active, and Version 1 is already on users' transcripts. The administrator assigns Version 1, but does NOT user the Assign New Occurrence option.	Users only receive Version 2.
Version 1 and Version 2 are active, and Version 1 has been removed from users' transcripts. The administrator assigns Version 1 using a learning assignment.	Version 2 is assigned to users, and Version 1 is also restored to users' transcripts.
Version 1 and Version 2 are active, and both versions are on users' transcripts. The administrator removes the online course from users' transcripts.	Version 1 and Version 2 are both removed from users' transcripts.

Considerations

The Learning Assignment Tool only assigns more than one version if an appended version of the online course exists.

Replace Versioning Behavior

When the Append option is NOT enabled for a reversioned online course, only one version of the online course can be in a Published status in the portal, and the new version replaces the previous version on selected users' transcripts when the effective date is reached.

When an online course is reversioned WITHOUT the Append option enabled, the new version exhibits the following behaviors:

- Only one version of the online course can be on a user's transcript.
- The Effective Date is either immediate or in the future.
- The Start Date and End Date only apply when the online course is appended. They do not apply when the course is replaced.

Note: *After choosing to either append or replace a version of an online course, any subsequent reversionings default to the same versioning option originally chosen (Append or Replace).*

Use Case - One Version on User's Transcript

David is an administrator responsible for all management training at ACME Inc. On August 15, 2017, David receives a call from the Legal Manager informing him that a new anti-harassment policy is available for the State of California, and it is immediately applicable. All managers working in California should be assigned the new online course version of the policy, and the previous version is obsolete.

David creates a new version of the Anti-Harassment Policy using the online course versioning functionality. He does not enable the Append option because he wants only the new version of the course to be available on users' transcripts. David adds an Effective Date of August 15, 2017 for the new policy. He assigns the new version to all managers in California at ACME Inc. The previous version of the Anti-Harassment Policy class is deactivated when the new version is created.

Sam is working in California as a manager at ACME Inc. Before August 15, 2017, Sam can access the previous version of the Anti-Harassment Policy. On August 15, 2017, Sam can only access the new version of the Anti-Harassment Policy. The previous version is automatically made inactive on his transcript.

Content Publishing - Curricula Auto Reversioning

With the October '17 release, when an online course is reversioned via Content Publisher, any curricula which contain the online course are automatically reversioned as well. In addition, when a previous version of an online course expires, the previous version is automatically removed from any curricula it is contained within. If an online course contained within a curriculum is reversioned, the new version of the online course is automatically updated within the newest version of the curriculum that contains the course. When this occurs, the curriculum is reversioned. The effective date of the new curriculum version is set to the effective date of the new online course version. The comments for the new curriculum version are the same as the new online course version. This occurs even if there are no users enrolled in the curriculum. **Note:** *Administrators can view the dynamic or dynamic recurring learning assignments for curricula containing any version of the online course.*

- If the new online course version replaces the previous version, the new version maintains the same settings within the curriculum as the previous version (i.e., item sequence, number of required items, pay upfront, pre-approved, auto-register).
- If the new online course version appends the previous version, then the behavior depends on whether there are already two versions of the course within the curriculum.
  - If there is currently only one version of the online course in the curriculum, then the new version is added with the same sequence number as the previous version. If all items in the section are required, then the new version is also required. If not all items in the section are required, then the number of required items for the section is unchanged. The new version has the same pay upfront, pre-approved, and auto-register settings.
  - If there are currently two versions of the online course in the curriculum, then the new version replaces the expired version in the curriculum. The new version is added with the same sequence number as the expired version. The number of required items for the section is unchanged. The new version has the same pay upfront, pre-approved, and auto-register settings.
- Because two versions of an online course may exist in a curriculum, one of the versions within the curriculum may expire, leaving only one active version. When this occurs, the sequence is unaffected, because both versions had the same sequence number. The number of required items in the section returns to its value prior to adding the appended version.

See the table below for curriculum behaviors resulting from various online course reversioning selections:

REPLACE OR APPEND?	REVERSION BEHAVIOR	SETUP	SEQUENCE	REQUIRED	PRE-APPROVED/PAY UPFRONT/REGISTER
Replace		Yes	Same sequence as	The same number of	The pre-approved/pay upfront/register

REPLACE OR APPEND ?	REVERSION BEHAVIOR	SETUP	SEQUENCE	REQUIRED	PRE-APPROVED/PAY UPFRONT/REGISTER
			Version 1 of online course	items are required for curriculum section completion after the online course and curriculum are reversioned.	selections are copied from the previous version to the new version.
Replace		No	Same sequence as Version 1 of online course	The same number of items are required for curriculum section completion after the online course and curriculum are reversioned.	The pre-approved/pay upfront/register selections are copied from the previous version to the new version.
Append	When two versions are appended	Yes	Same sequence as Version 1 of online course	-When zero items in the section are required, zero items are required after the reversion. For example, if 0/3 items were required prior to reversioning, 0/4 items are	The pre-approved/pay upfront/register selections are copied from the previous version to the new version.

REPLACE OR APPEND ?	REVERSION BEHAVIOR	SETUP	SEQUENCE	REQUIRED	PRE-APPROVED/PAY UPFRONT/REGISTER
				required after the reversioning. -When all items in the section are required, all items are required after the reversion. For example, if 3/3 items were required prior to the reversioning, 4/4 items are required after the reversioning. -When not all items in the section are required, the reversioned course becomes optional within the section. For example, if 2/4 items in the section were required prior to the reversioning,	

REPLACE OR APPEND?	REVERSION BEHAVIOR	SETUP	SEQUENCE	REQUIRED	PRE-APPROVED/PAY UPFRONT/REGISTER
				2/5 items in the section will be required after reversioning.	
Append	When two versions are appended	No	Same sequence as Version 1 of online course	The same number of training items are required for curriculum completion after the online course and curriculum are reversioned.	The pre-approved/pay upfront/register selections are copied from the previous version to the new version.
Append	When the new version replaces the old version	Yes	Same sequence as Version 1 of online course	-When zero items in the section are required, zero items are required after the reversion. For example, if 0/3 items were required prior to the course reversioning, 0/4 items will be required after reversioning.	The pre-approved/pay upfront/register selections are copied from the previous version to the new version.

REPLACE OR APPEND?	REVERSION BEHAVIOR	SETUP	SEQUENCE	REQUIRED	PRE-APPROVED/PAY UPFRONT/REGISTER
				-When all items in the section are required, all items are required after the reversion. For example, if 3/3 items were required prior to the course reversioning, 4/4 items are required after reversioning. -When not all items in the section are required, the reversioned course becomes optional in the section. For example, if 2/4 items in the section were required prior to the course reversioning, 2/5 items in the section	

REPLACE OR APPEND?	REVERSION BEHAVIOR	SETUP	SEQUENCE	REQUIRED	PRE-APPROVED/PAY UPFRONT/REGISTER
				are required after reversioning.	
Append	When the new version replaces the old version	No	Same sequence as Version 1 of online course	The same number of items are required for curriculum section completion after the online course and curriculum are reversioned.	The pre-approved/pay upfront/register selections are copied from the previous version to the new version.

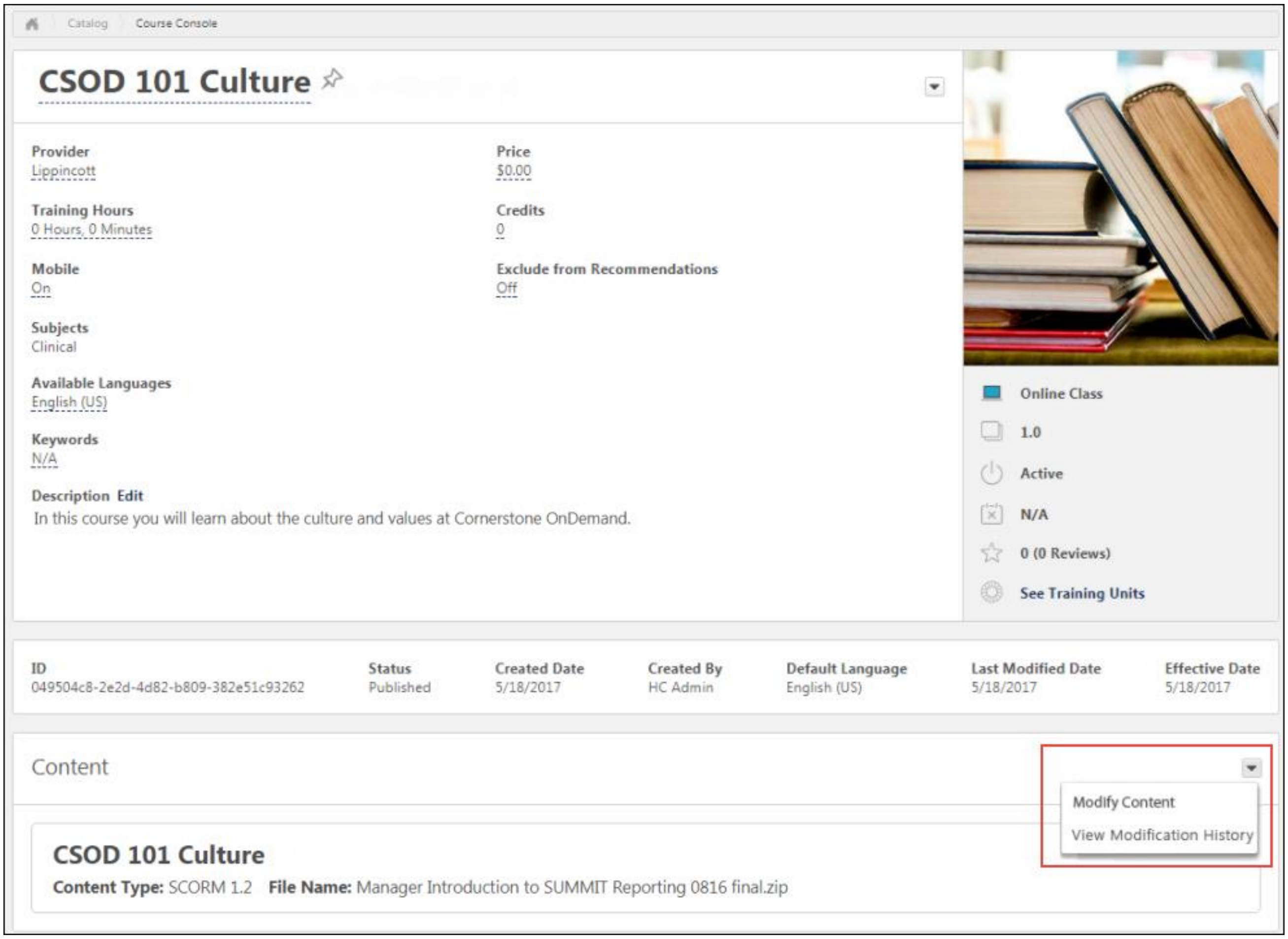
Modify an Online Course

When an online course only requires minor updates, you can replace the files without creating a new version of the online course, using the Modify Content option available on the Course Console page for the class. The course files uploaded during the modification process must be the same file structure as the original files in order for the online course modification to process.

To create modify the course files for an online course, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link. Find the online class in the Course Catalog and then click the course title. From the Course Console page, click the **Options** drop-down menu in the Content section and click the **Modify Content** option.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	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. With the Oct '17 release, this permission allows administrators to reversion online classes via the Course Console page.	Learning - Administration
Online Class - Modify	Grants ability to modify an online class without creating a new version of the online class.	Learning - Administration
Upload History - View	Grants ability to view the Upload History page.	Learning - Administration



Modify Content

To modify the course files of an existing course, click the Modify Content option in the Content section. This directs you to the Modify Content page, where you can upload the modified course files.

To upload a modified set of course files or publications:

1. Drag and drop your zipped SCORM or AICC course files into the Upload Files box, or click the **ADD FILES** button and select the zipped course files from your computer. In order to successfully replace course files, the course files must be zipped to reflect the same structure as the original files. If the course files are not the same structure, or the file location is not the same, you will need to reversion the course instead. **Note:** *Courses must be zipped into a single zip file. You can upload up to 750 MB per file.*
2. After the course files have been added, they will begin uploading. A progress bar below the files displays the ongoing upload progress for the files. Each set of files displays the following information:
    - File name
    - File Type
    - Status (i.e. Uploading, Critical Error)

3. If there are problems with the upload, the status changes to Critical Error, and you can click the **VIEW ERROR REPORT** button to view the reasons for the upload errors and address any issues. If the new files are not the same structure as the original files, the upload results in an error. Once the files successfully finish uploading, they are transferred to the Processing section. Continue managing the upload from the Processing section.

If needed, you can delete a set of course files from the Upload Files section by clicking the **DELETE UPLOAD** button.

Processing

Uploaded files move to the Processing section while the system checks the files for errors.

When a set of course files is transferred to the Processing section, click the **Provider** drop-down menu and select the provider for the course. After a Provider has been selected, the set of course files moves to the Draft Ready section once processing is completed.

If needed, you can delete a set of course files from the Processing section by clicking the **DELETE UPLOAD** button.

Needs Provider

If the course provider still needs to be selected for the course files after they finish processing, the files appear in the Needs Provider section. Select a course provider from the **Select Provider** drop-down menu. Once a provider is selected, the course files automatically move to the Draft Ready section.

Draft Ready

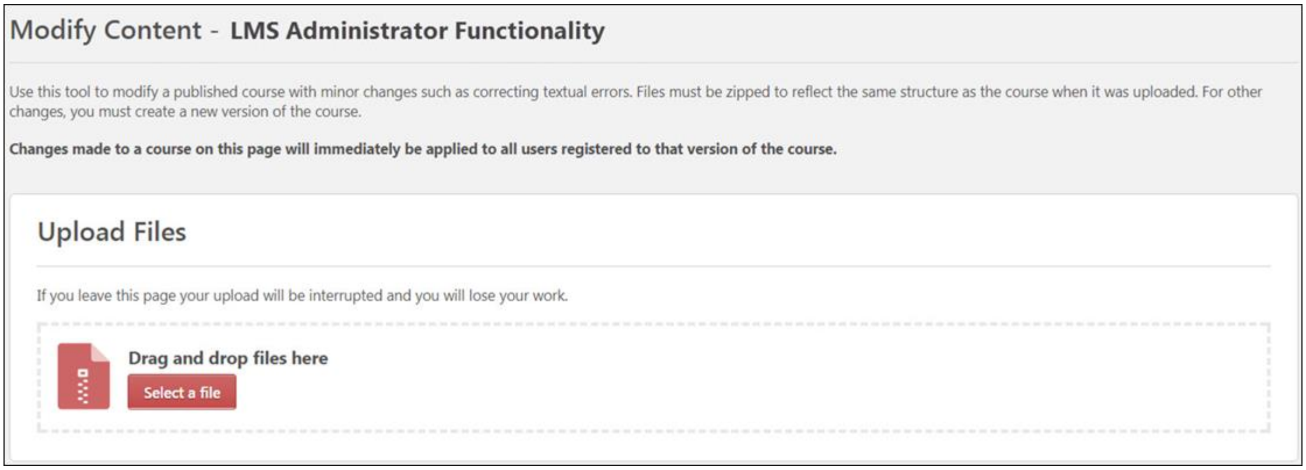
Once a set of course files moves to the Draft Ready section, its status changes to Uploaded Successfully, and it is available in the Course Catalog as a draft. Select a provider for the online course using the drop-down menu next to the uploaded course files.

Using the Course Catalog, you can configure the metadata for the new online course. Click the **MODIFY CONTENT** button to replace the original online course files with the new files. After clicking the **MODIFY CONTENT** button, a pop-up window appears, saying, "Modifying the content will overwrite the current files. You will not be able to undo this action. Are you sure you want to proceed?" If you wish to proceed, click the **MODIFY CONTENT** button in the pop-up window. You will be redirected to the Course Console page.

To view information about the online course's modification history, click the **REVIEW CONTENT MODIFICATION** button. This opens a flyout which displays the following information for the course files in the Draft Ready section:

- Title
- File Name
- Current Size
- New Size

If you do not want to modify the content, click the **CANCEL** button to close the pop-up without publishing the new files.

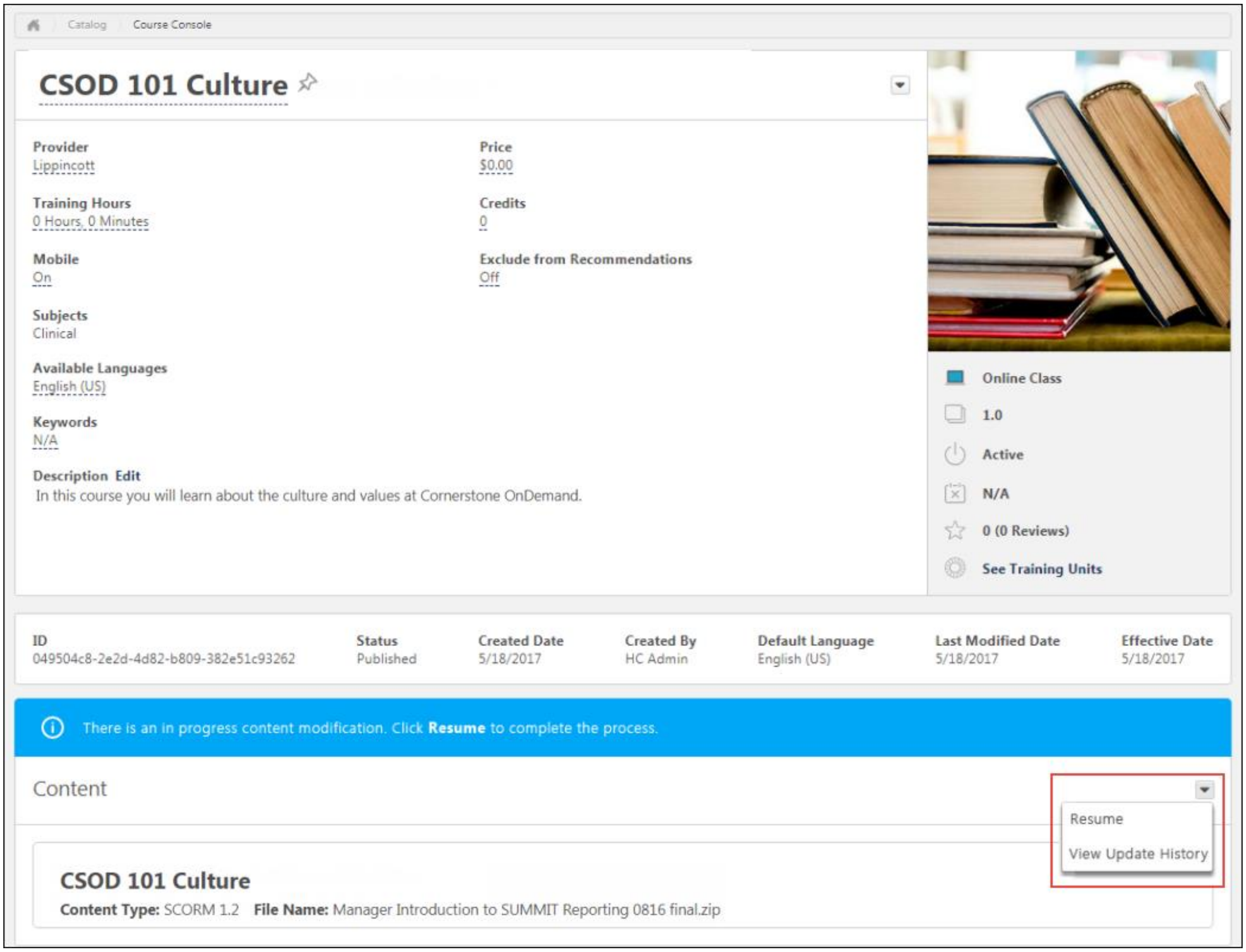


View Modification History

Clicking the **View Modification History** option from the Content section of the Course Console opens a flyout window with information about the online course's modification history. *See* **Modification History** *on* page 181 *for additional information.*

Considerations

- If an upload is currently in progress for the online course when an administrator navigates to the Course Console page, a notification displays at the top of the Content section, alerting them to the in progress upload. If the administrator wishes to view the in progress upload, they can click the **RESUME** button which displays in the notification. This directs the administrator to the Modify Content page. To resume the upload, click the **RESUME UPLOAD** button.
- There are validation messages that will disable the content modification if the structure of the course files is modified from the original version. Changes which modify the course files structure require you to reversion the online course.



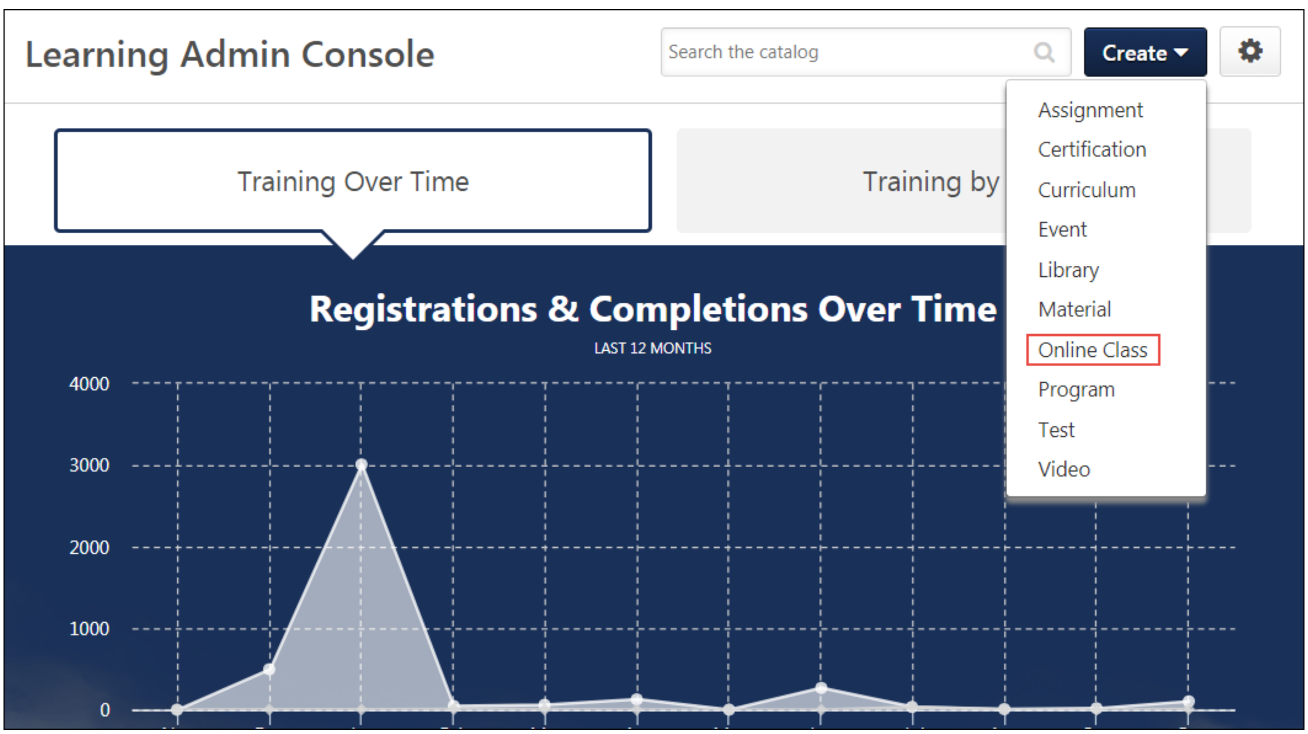
- When an administrator accesses the Modify Content page for a course that is part of a multi-package publication, a notification appears, warning the user that modifying the content for the course will impact other courses within the publication.

Access Content Uploader from Learning Admin Console

Administrators with permissions to access the Learning Admin Console and create new online courses can access the Content Uploader from the Learning Admin Console.

To access, the Learning Admin Console, go to ADMIN > TOOLS > LEARNING and click the **Learning Admin Console** link.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Publisher	Grants access to LCMS Course Publisher, which enables upload and publishing of SCORM and AICC compliant online courses, created either in the LCMS Course Builder, or from a third party course building tool. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator permission. 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.	Learning - Administration
Learning Admin Console - View	Allows users to view the Learning Admin Console. This permission cannot be constrained. This is an administrator permission.	Learning - Administration



Create Online Course

To begin creating an online course from the Learning Admin Console, click the **CREATE** button and then click the **Online Class** link. You will be navigated to the Content Uploader page, where you can begin creating a new course.

Content Publishing Redesign - Search for Online Courses

If an online course has been appended, meaning more than one version of the course is currently published in the system, when users search for training in any of the following locations, they can select from the two available versions of the online course:

- Global Search
- Browse for Training
- Learning Search (accessed via the Learner Home page)

Custom Reporting - Learning Fields

Custom Reporting - Learning Fields - Overview

Prior to this enhancement, several learning assignment fields could not be reported on via custom reporting functionality. For example, it was not possible to report on the organizational unit (OU) type, OU description, or OU owner of OUs selected as assignment criteria in learning assignments.

With this enhancement, custom reporting has been enhanced to include the addition and improvement of several fields related to assignment criteria selected within learning assignments.

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 Assignment Report - Create	Grants ability to create and edit custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics
Custom Assignment Report - View	Grants ability to view custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics

New Learning Fields

Fields which allow administrators to report on additional learning assignment criteria, such as organizational unit (OU) type, OU description, or the OU owner of selected assignment criteria are available for use with custom reporting.

The following new fields are included in the Assignment section, available for use with Assignment reports and Transcript reports:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Assignment User Criteria (OU Type)	Assignment Section	This is the organizational unit (OU) type of the user criteria that was included in the assignment. Users are displayed individually on separate rows.	Text	Assignment Report, Transcript Report
Assignment User Criteria (OU Description)	Assignment Section	This is the OU description of the users included in the user criteria for the assignment. Users are displayed individually on separate rows.	Text	Assignment Report, Transcript Report
Assignment User Criteria (OU Owner - Name)	Assignment Section	This is the OU owner name of the users included in the user criteria for the assignment. Users are displayed individually on separate rows.	Text	Assignment Report, Transcript Report
Assignment User Criteria (OU Owner - User ID)	Assignment Section	This is the OU owner user ID of the users included in the user criteria for the assignment. Users are displayed individually on separate rows.	Text	Assignment Report, Transcript Report
Assignment User Criteria (OU Parent)	Assignment Section	This is the OU Parent of users included in the user criteria for the assignment. Users are displayed individually on separate rows.	Text	Assignment Report, Transcript Report

Launch xAPI Learning Records

Launch xAPI Learning Records - Overview

Prior to this enhancement, learners using the xAPI Learning Reporter were required to launch xAPI learning experiences outside the portal even after using the Learning Reporter widget to record those experiences to the completed section of the transcript.

With this enhancement, users can launch completed xAPI learning records directly from their learning transcripts.

Click here to access the xAPI Learning Reporter Starter Guide.

Use Case

Lynda is a marketing manager at ACME Corporation, who frequently needs to articulate research about HR Strategy in Life-Science organizations. Lynda often searches for relevant data from different sources. After watching a TED video, she wants to add it as a learning record to her transcript.

Lynda clicks the Learning Reporter widget in her bookmarks toolbar within her Internet browser and views the Learning Reporter options. The new learning activity is now available on her transcript's completed section.

After a few days, Lynda wants to watch the video again. She accesses the completed section of her transcript and launches the video straight from the transcript page.

Implementation

This functionality is automatically enabled for all portals using the Learning module and the xAPI Learning Reporter. If your organization is not yet using the xAPI Learning Reporter, contact Global Product Support for enablement information. For general information about the xAPI Learning Reporter, *see xAPI Learning Reporter.*

Permissions

The following existing permission applies 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

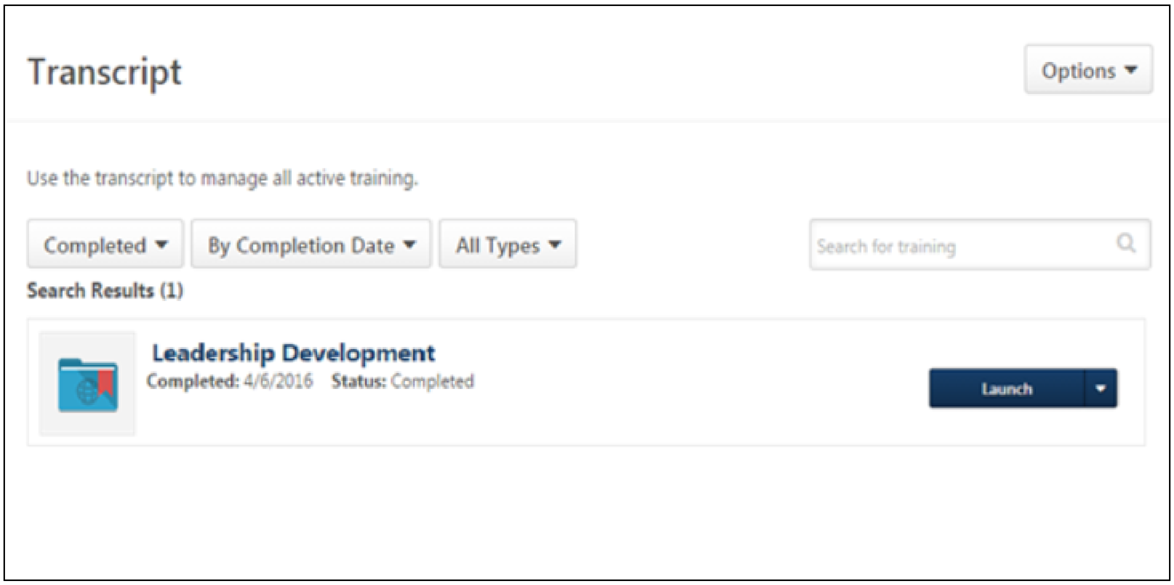
Launch Learning Record

Learners using the xAPI Learning Reporter can access and launch learning records from the completed section of their learning transcript.

To access the completed section of the transcript, go to LEARNING > VIEW MY TRANSCRIPT and click the **ACTIVE** button above the transcript. Click the **Completed** option from the drop-down menu to access the completed section of the transcript.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
xAPI - View Learning Records on Transcript	Allows users to view xAPI Learning Records on the Transcript.	Learning



Launch Learning Record

When the user accesses the completed section of the learning transcript, previously recorded xAPI learning records display with a **LAUNCH** button. Clicking the **LAUNCH** button opens the xAPI learning record in a pop-up window, allowing the user to view the resource again. The user can also launch the learning record by clicking the **Launch** option in the **Options** drop-down menu for the learning record.

For more information about the xAPI Learning Reporter, *see xAPI Learning Reporter.*

Learner Home Enhancements

Learner Home Enhancements - Overview

In August 2017, the Learning Experience Platform, which includes the Learner Home and Learning Search pages, was released to enhance users' training experiences. 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. However, administrators were not able to hide carousels, customize the cover image at the top of the Learner Home, localize the text in the Custom Banner, or hide the training sidebar if needed. The sidebar could not display the training purpose, and the predictive search function on the Subjects flyout was limited.

With this release, administrators have more Learner Home preference options, and the Learner Home page has been updated to facilitate an improved user experience with subjects and training purposes.

Administrators have the following abilities via the Learner Home Preferences page:

- Ability to hide content carousels
- Configure the cover image of Learner Home
- Localize the text in custom banners
- Hide the training sidebar

The following enhancements have been made to the Learner Home page:

- Training purposes display in the training sidebar
- The Subjects flyout provides predictive search capabilities and the ability to browse the subject hierarchy

Click here to access the Learner Home and Learning Search Starter Guide.

Click here to access the Learner Experience Platform Checklist.

Use Cases

Use Case 1: Learner Perspective

Sarah has been with Acme Corporation for two years. She often logs into her company's training portal to take training that is assigned to her and also browse through the portal to learn on her own. She logs into her personalized Learner Home page to take her assigned training. Her company uses the **Training Purpose** field to help identify training that is required for compliance. She notices a training purpose called **Compliance** for some of her training in the Due Soon section. She knows that these training items are required for compliance and completes them.

Sarah then decides to indicate interest in a subject related to Photoshop classes. She clicks the **Add Subjects** link and types "Photo" into the search box. The subject called "Adobe Photoshop" appears as a predictive result, and she clicks it to indicate interest in the subject. She then clicks the Browse tab to view the hierarchy of subjects that are configured for the portal.

Use Case 2: Administrator Perspective

Steve has been with Acme Corporation for two years. He is a part of the Learning and Development department and is the administrator for the learning portal. He is working to roll out the Learning Experience Platform to some of the company's learners.

Steve logs into the learning portal and navigates to the Learner Home Preferences page. From there, he configures the cover image at the top of the page to display a custom image that fits his company's colors and branding. He can also choose to disable certain carousels. He also realizes that many of his learners are in different countries, so he needs to localize the text in the custom banner to match the language for those learners. Steve can do this from the Learner Home Preferences page.

Considerations

Machine Learning will be refreshed once during the first half of UAT.

Implementation

This functionality is automatically enabled for all portals using the Learning module. For more information about the Learning Experience Platform released in August 2017, *see Learner Home Configuration - Overview.*

Permissions

The following existing permissions apply to this functionality:

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	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 - Enable and Disable Carousels

With this enhancement, administrators can control whether or not several content carousels display on the Learner Home page.

The following Learner Home carousels can be activated or deactivated:

- Continue Learning
- Custom Banner (via the Custom Banner Configuration section)
- Top Picks for User
- Trending for User
- Inspired by Your Subjects
- Most Popular

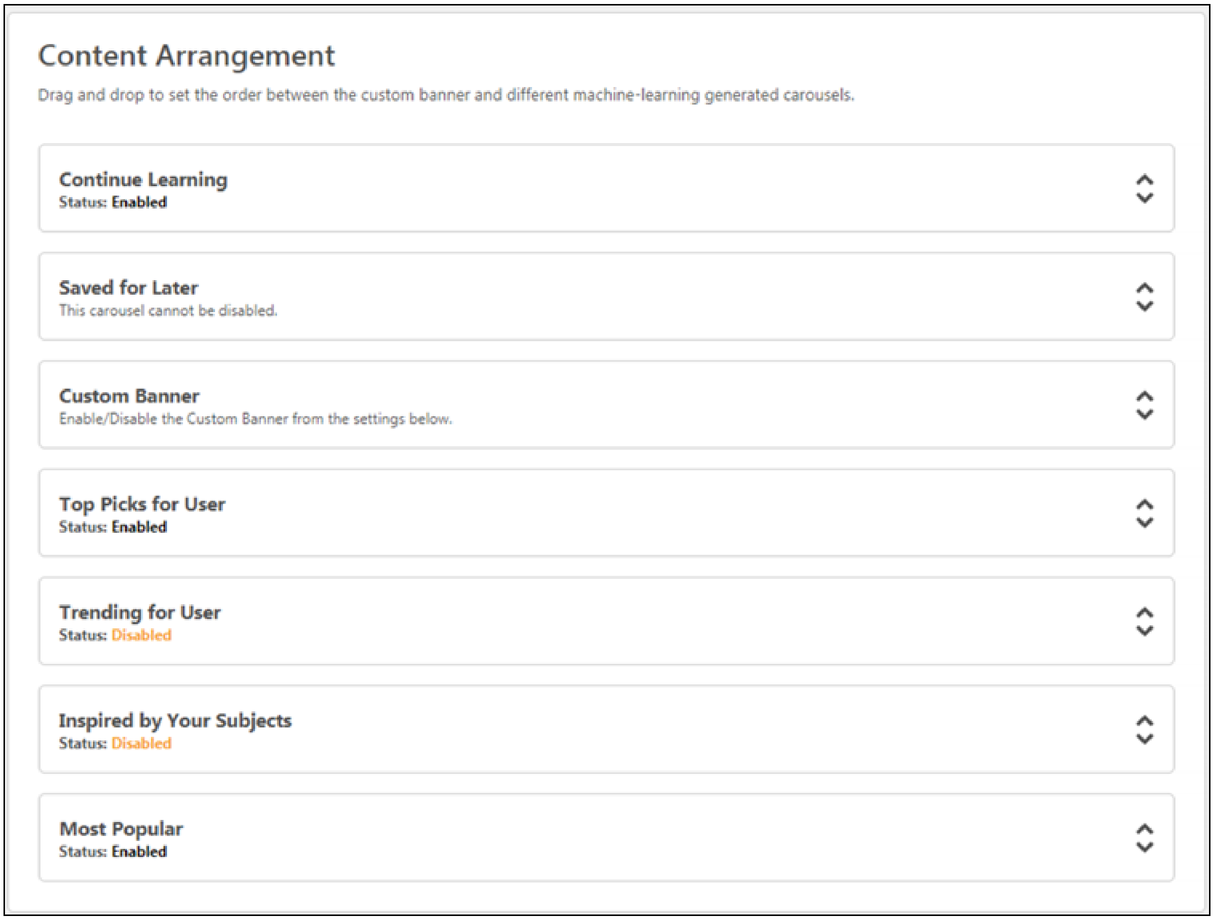
Note: *The Saved for Later section cannot be disabled.*

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 a different OU.*

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



Enable/Disable Carousels

Below each carousel title, a Status field displays, alerting the administrator to whether the carousel is enabled or disabled.

- If the **Enabled** link displays as a carousel's status, the carousel is active on the Learner Home, and if needed you can click the **Enabled** link to disable the carousel. The link then changes to **Disabled**.
- If the **Disabled** link displays as a carousel's status, the carousel is NOT active on the Learner Home, and if needed you can click the **Disabled** link to enable the carousel. The link then changes to **Enabled**.

After making changes to the Learner Home carousels, click the **SAVE** button at the bottom of the Learner Home Preferences page.

Learner Home- Custom Banner Text Localization

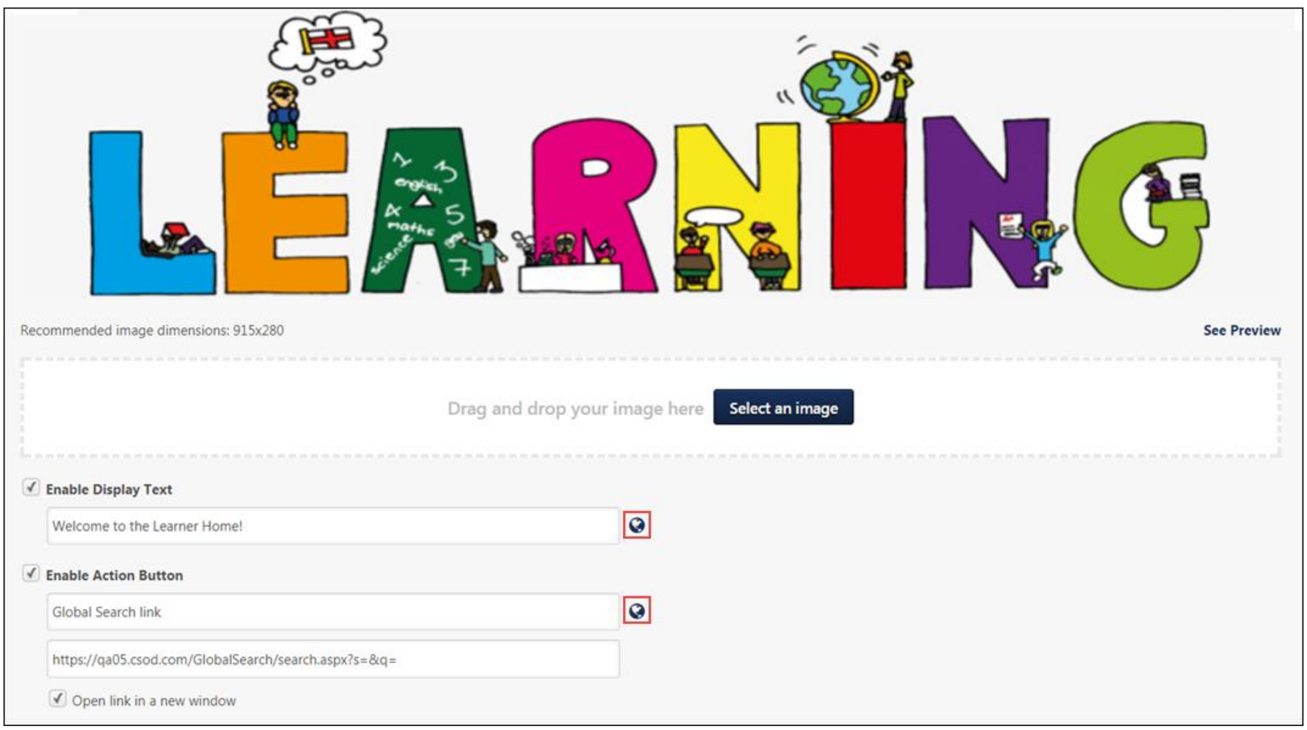
With this enhancement, administrators are able to localize the display text and the action button text for Learner Home banners into other languages.

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 a different OU.*

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



Localize Text

After scrolling to the Custom Banner Configuration section and clicking one of the custom banner image tiles, you can localize the following fields:

- **Display Text**

- **Action Button**

To localize the text for either field into other languages:

1. Click the Globalization icon to the right of the field. A pop-up window appears with all available system languages.
2. Enter translated text into the text boxes below languages which should have translations in your portal.
3. Click the **Save** link at the bottom of the pop-up to save your input translations.
4. Click the **SAVE** button at the bottom of the Learner Home Preferences page to save and apply your text localizations.

Note: *If there is no localized text for the language of the user accessing Learner Home, then they will see the text in the default language of the portal.*

Note: *The text field outside of the pop-up window displays the text based on the language of the user accessing the portal. If there is no localized text for the user's language, then the field displays the text in the default language of the portal.*

Learner Home - Configure Cover Image

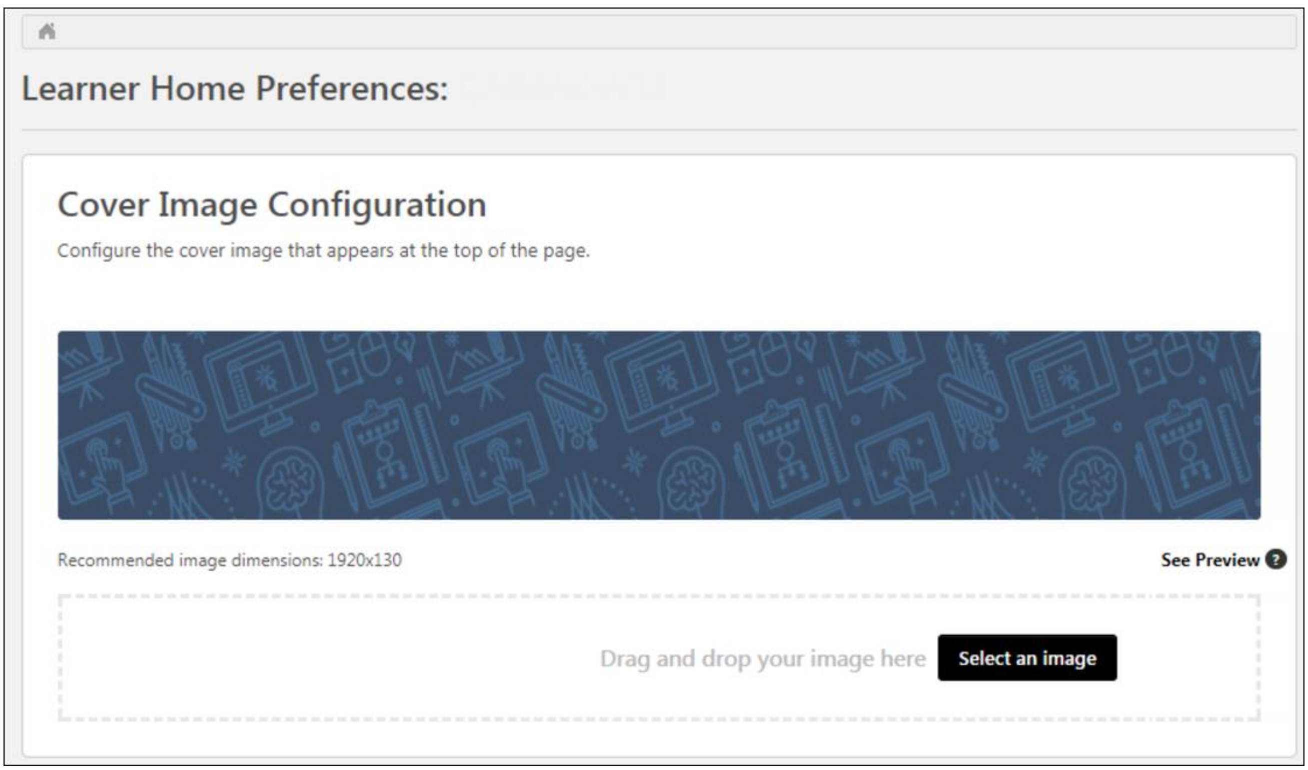
With this enhancement, administrators can configure a custom cover image which displays at the top of the Learner Home page, allowing them to integrate company colors and branding into the Learner Home experience.

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 a different OU.*

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



Cover Image Configuration

To upload a cover image for the Learner Home page:

1. Drag and drop your prepared image file into the image upload zone in the Cover Image Configuration section, or click the **SELECT AN IMAGE** button and search for and select the image file from your computer.
2. When the image finishes uploading, the file name displays in the Cover Image Configuration section with a thumbnail version of the image. To preview the image as it will appear on the Learner Home page, click the **See Preview** link. **Note:** *The image preview only displays the image based on the recommended dimensions of 1920 x 130. The uploaded image is NOT cropped to fit Learner Home. To ensure proper fit, it is necessary to upload a custom cover image that meets the system's recommended dimensions.*
3. The Content Image Configuration section refreshes to display a full size version of the uploaded image. Review the image to ensure it displays as expected. If the image does not appear as desired, you can click the **Reset** link above the image preview, which restores the Cover Image Configuration section to default settings.
4. Once the cover image displays as expected, click the **SAVE** button at the bottom of the Learner Home Preferences page.

Image Specifications

The following image specifications apply to cover images:

- Supported file types: bmp, gif, jpg, jpeg, png
- Maximum file size: 5 MB
- Recommended Dimensions: 1920x130

Learner Home - Side Bar Enhancements

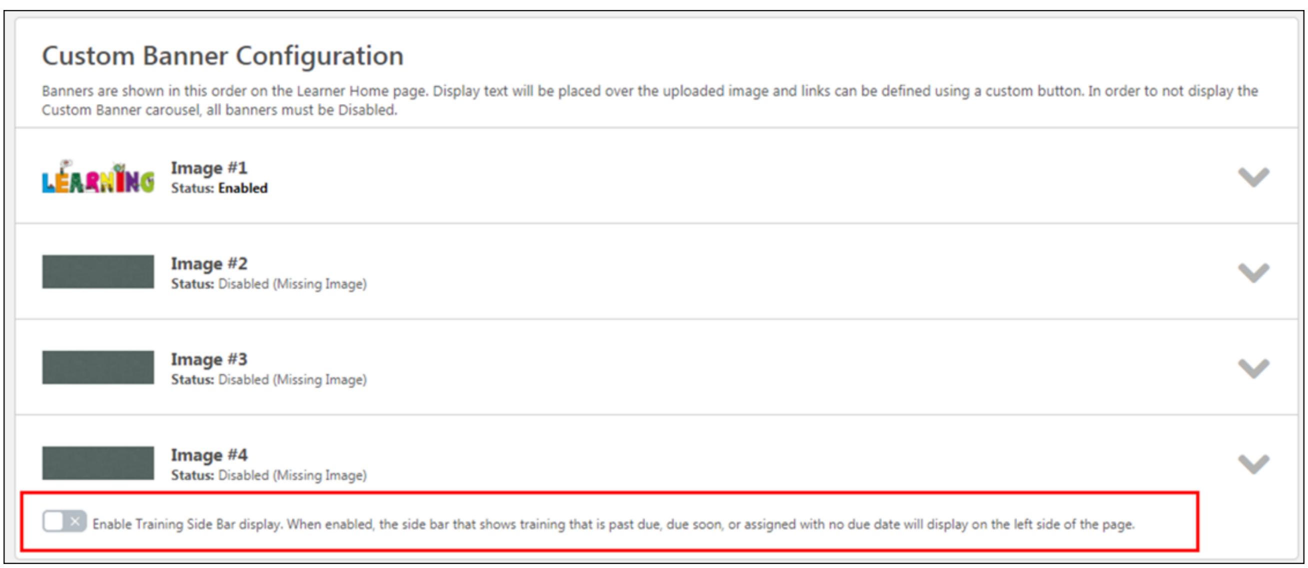
Administrators can control whether or not the training sidebar displays on the Learner Home page using the Enable Training Side Bar option at the bottom of the Learner Home Preferences page. When the training sidebar is disabled, it does not appear on Learner Home. For more information about the training sidebar and the information it contains, *see Learner Home - Training Side Bar.*

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 a different OU.*

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



Enable Training Side Bar

To disable the training sidebar, toggle the **Enable Training Side Bar** switch to the Off position. To enable the training sidebar, toggle the **Enable Training Side** Bar option to the On position. After changing settings on the Learner Home Preferences page, click the **SAVE** button at the bottom of the page to save and apply your changes to the Learner Home.

Learner Home - Your Subjects Flyout Enhancements

With this enhancement, when a user searches for subjects using the Your Subjects flyout on the Learner Home page, the system predictively displays any subjects with words that start with the entered search term. Users can also browse the complete hierarchy of subjects, including parent and child subjects.

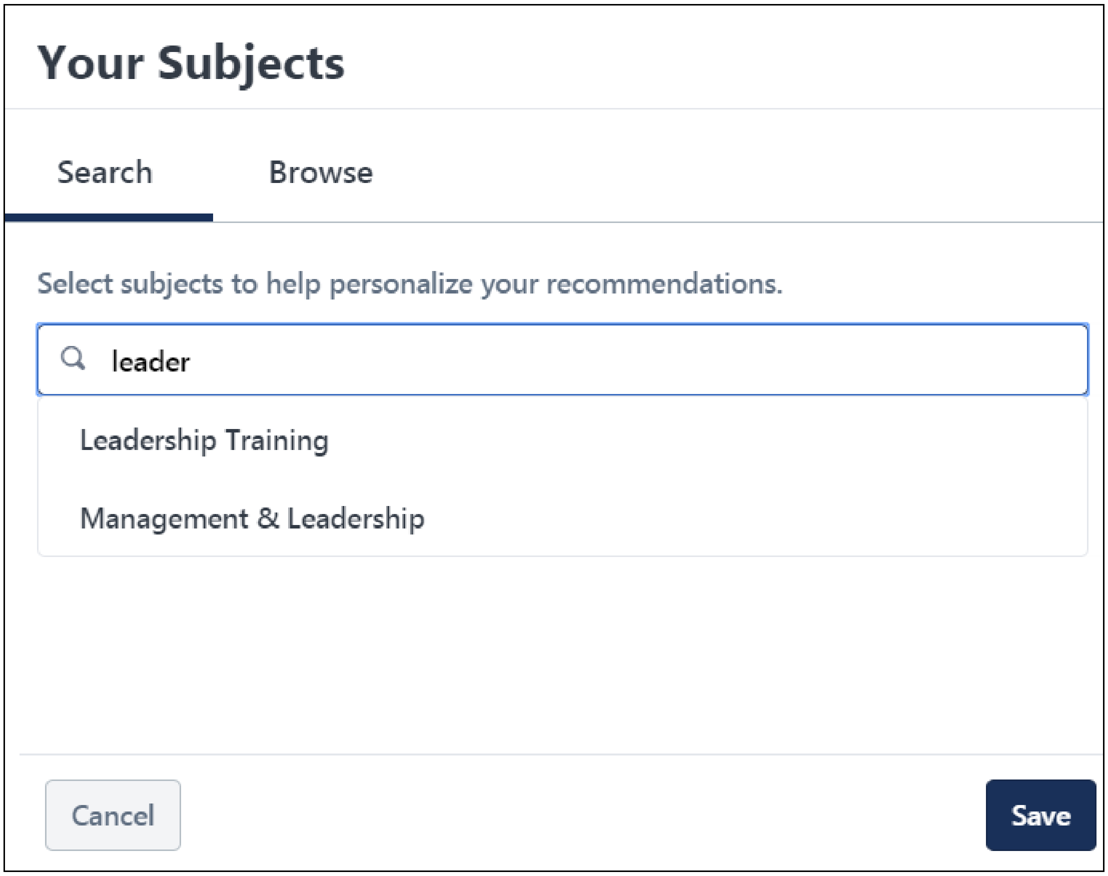
To access the Learner Home, go to LEARNING > LEARNER HOME. In the Your Subjects section of the user profile section of Learner Home, click the **Add** link or the **Edit** link. This action opens the Your Subjects flyout.

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 - Search

To search for a specific subject or for subjects containing a keyword, enter a word or phrase into the Your Subjects search bar. As you type, the predictive search functionality displays subjects with words that start with the entered text. When the desired subject displays, click the subject to add it to your Selected subjects. After selecting all your subjects, click the **SAVE** button at the bottom of the flyout to add the subject(s) to Your Subjects section of the Learner Home user profile.



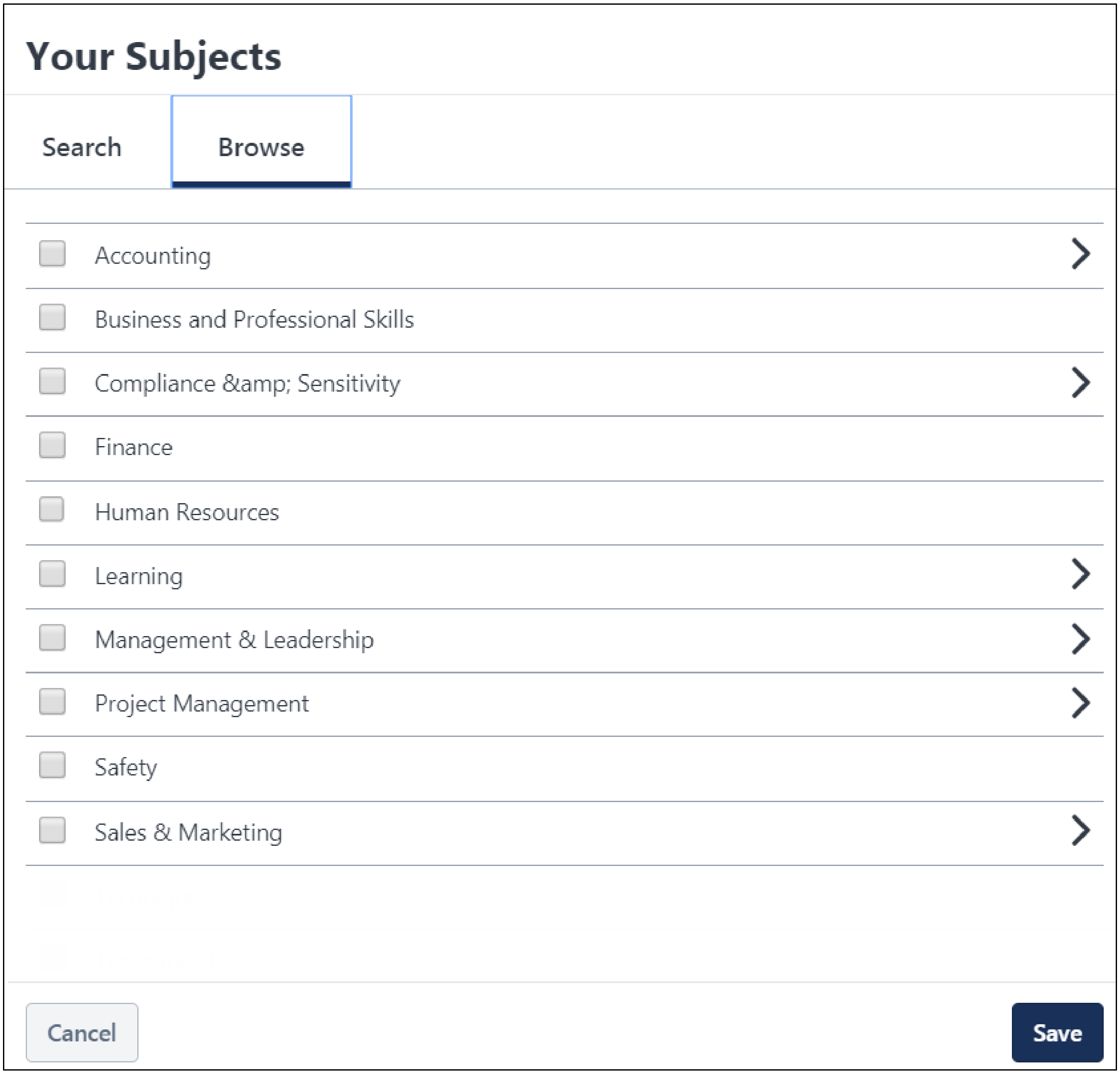
Your Subjects - Browse

To browse the entire hierarchy of subjects in the system, click the Browse tab in the Your Subjects flyout. On the Browse tab, the parent level subjects in the system display. If a subject has child subjects organized beneath it in the hierarchy, an arrow icon displays to the right of the subject. To expand the hierarchy and view the children of a subject, click the drop-down arrow next to the subject. Subjects you have already selected appear as checked in the Browse tab.

To select a subject from the hierarchy, check the box next to the subject. After selecting all your subjects, click the **SAVE** button at the bottom of the flyout to add the subject(s) to Your Subjects section of the Learner Home user profile.

Note: *When a learner can view training items within a child subject, they are always able to see the subject's parents subject, even if they are unable to view training items associated with the parent subject.*

Note: *When a learner can view training items in a parent subject, but cannot view training items in a child subject of the parent, the child subject does not display to the learner.*



Considerations

Changes to a training item's availability, active status, training status, and the subjects associated with a training may take up to one hour to be reflected in the Your Subjects flyout.

Learner Home - Training Purpose

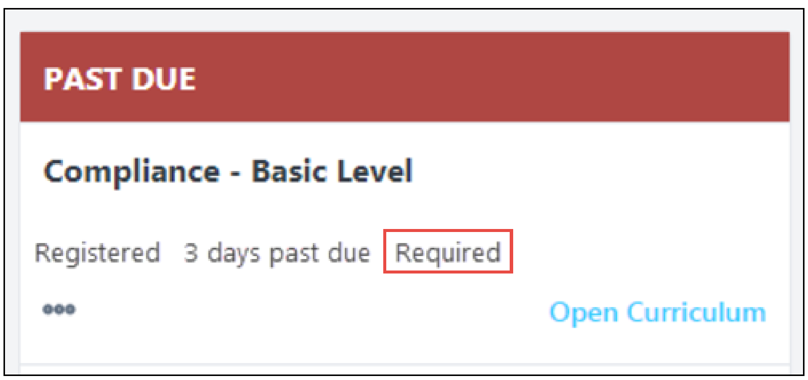
With this enhancement, training items that appear in the training sidebar on the Learner Home page display the training purpose for the training, if applicable. The training purpose may display for training items in the following training sidebar sections:

- Past Due
- Due Soon
- Assigned / No Due Date

To access the 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



Training Purpose

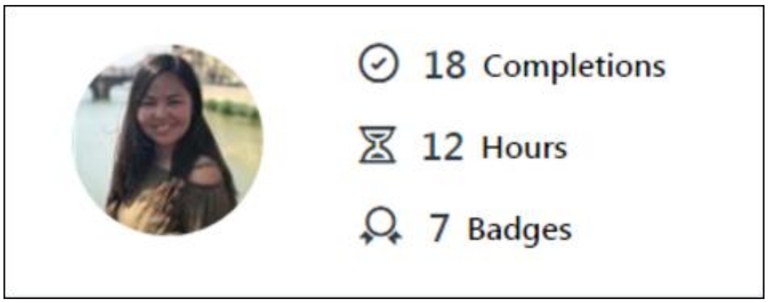
When specified for a training item, the training purpose displays to the right of the training status and due date. For example, if the training purpose, "Required," is associated with a training item, "Required" displays in the tile for the training item in the training sidebar.

Note: *If no training purpose was selected for the training item, no training purpose displays for the training in the training sidebar.*

Learner Home - User Interface Modifications

With this enhancement, the following minor changes have been made to the user profile section of the Learner Home page:

- The profile photo is oriented to the left side of the user profile tile.
- The user's number of completions, hours, and badges displays to the right of the profile photo.



Learning Search Enhancements

Learning Search Enhancements - Overview

Prior to this enhancement, the Learning Search page offered three filters for helping users find training. The URL for accessing the Learning Search page could be configured for a specific text query, but filter options could not be customized for the URL. In addition, the Learning Search page could not be accessed separately from Learner Home, and it could not be added as a link under a navigation tab.

With this enhancement, the Learning Search page is redesigned with the following features:

- Four new filters, in addition to the three previously existing filters
- New searching and filtering logic
- New filter tags
- Customized URLs with pre-filtered searches
- Ability to add Learning Search as a navigation tab link
- Updated user interface

Click here to access the Learner Home and Learning Search Starter Guide.

Use Case

Sarah works at Acme Corporation. She navigates to her personalized Learner Home page to find and take her assigned training. Her company has configured one of her custom banners to feature training for a specific provider and subject. She clicks on the button in the banner and is redirected to the Learning Search page, which is pre-filtered by the specific provider and subjects described by the banner, and a filter for training with a duration of less than fifteen minutes is also applied. She browses through the results on the page.

She decides to search for a course on Adobe Photoshop. She enters the search term and notices that the filters are cleared to present all results relevant to her search query. She expands the filters and notices they all have numbers next to them to represent the number of training results related to each one. Later, Sarah accesses the Learning Search page from her mobile device and uses the mobile filter to search for courses that she can take on her mobile device.

Considerations

Machine Learning will be refreshed once during the first half of UAT.

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

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
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.	Core Administration

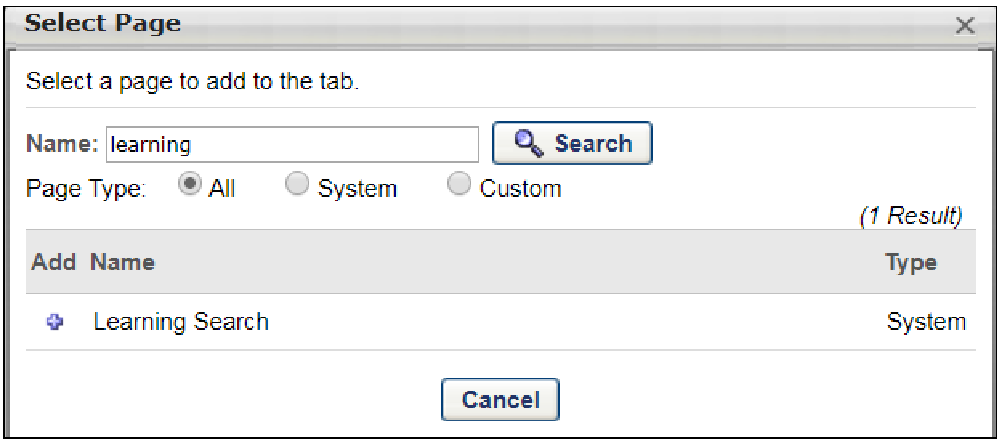
Learning Search - Add Learning Search Link to Navigation Tabs

With this enhancement, the Learning Search page can be accessed independently from the Learner Home page, and Learning Search can be added as a link under a navigation tab.

To manage Navigation Tabs and Links preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > NAVIGATION TABS AND LINKS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.	Core Administration



Navigation Tabs and Links

To add the Learning Search page to a navigation tab in Navigation Tabs and Links:

1. Click the Add Page icon in the Options column of the navigation tab row. This opens the Select Page pop-up.
2. To add the Learning Search page as a link under the tab, click the plus icon to the left of the page name in the Add column. This adds the selected page to the bottom of the navigation tab to which the page was added. The page can then be reordered, if necessary, by dragging and dropping it into the appropriate position.
3. Once the Learning Search link has been added to the page, you can click the Edit icon next to the link to edit the link's title. **Note:** *The page header and description are NOT editable for the Learning Search page.*
4. Click the **SAVE** button at the bottom of the page to save and apply the changes you have made to the navigation tabs and links.

Learning Search - Filter Sidebar

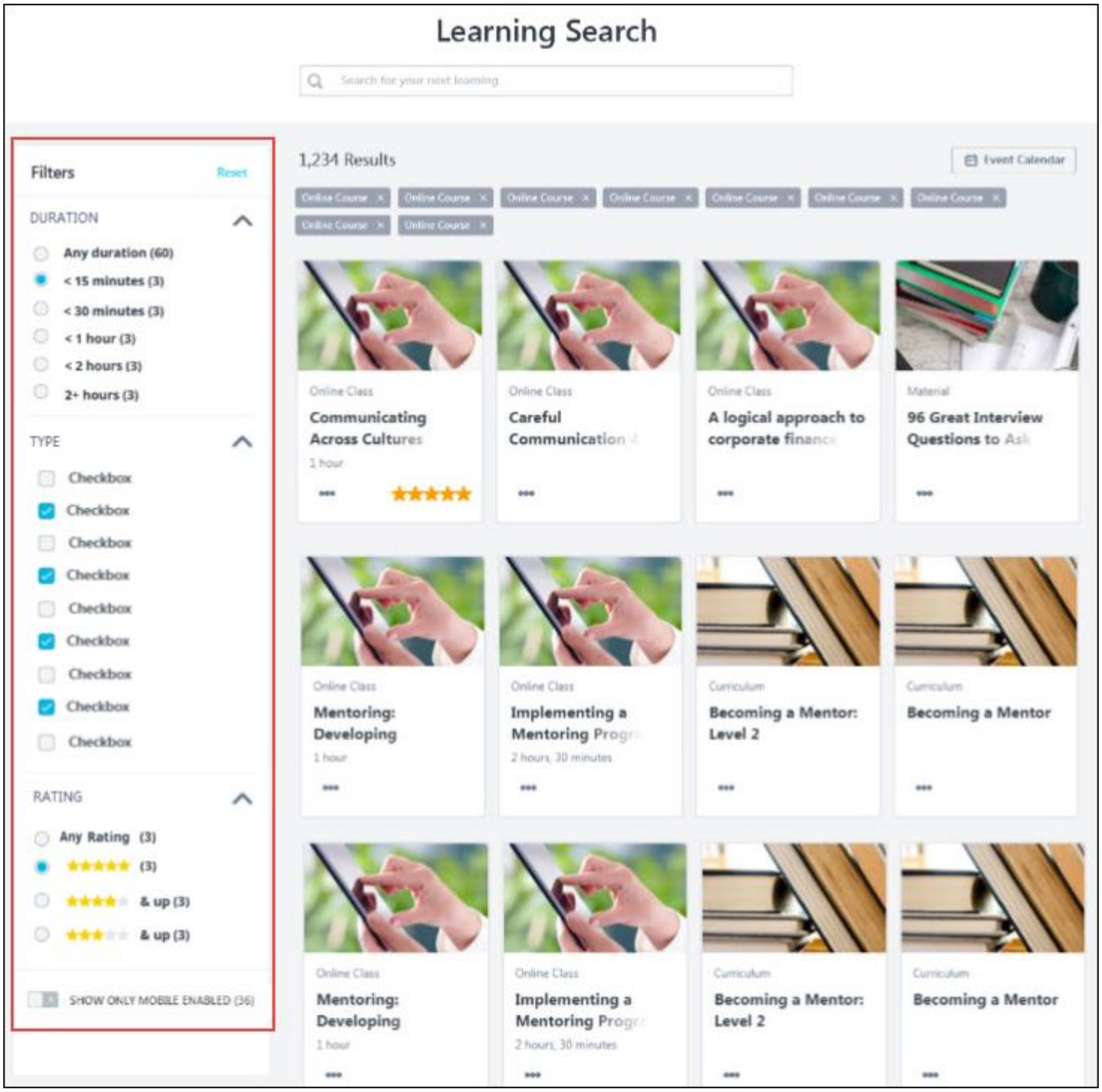
With this enhancement, training filters are available in a sidebar on the left side of the Learning Search page, and the number of training results which meet each filter selection displays next to each filter option in parentheses. The following filters are available:

- Duration
- Type
- Subject
- Rating
- Provider
- Language
- Show Only Mobile Enabled

To access the Learning Search page, go to LEARNING > LEARNER HOME and enter search terms into the search bar at the top of the page and press Enter.

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



Filter Sidebar

To apply a filter to your training search results, expand the appropriate section and select one or multiple filter field options, depending on the selection type of the filter. The filter sidebar is collapsed by default. View the table below for more information about the available filters:

FILTER	SELECTION TYPE	OPTIONS	ADDITIONAL NOTES
Duration	Single-select radio buttons	○ Any Duration (default) ○ < 15 minutes ○ < 30 minutes	Duration options display based on the entered search terms, meaning that if no training that meets a user's search criteria has a duration of

FILTER	SELECTION TYPE	OPTIONS	ADDITIONAL NOTES
		○ < 1 hour ○ < 2 hours ○ 2 + hours	greater than two hours, then the **2+ hours** filter option doesn't display.
Type	Multi-select check boxes	○ Curriculum ○ Event ○ Library ○ Material ○ Online Class ○ Program ○ Quick Course ○ Test ○ Video	Type options display based on the entered search terms, meaning that if, for example, no curricula meet the user's search criteria, the **Curriculum** filter option does not display.
Subject	Multi-select check boxes	The top ten subjects related to the search result display, all unselected by default	If no training that meets the user's search criteria has an associated subject, the subject filter does not display.
Rating	Single-select radio buttons	○ Any Rating (default) **Note:** *This includes training with no ratings* ○ ★★★★★ ○ ★★★★ & up ○ ★★★ & up ○ ★★ & up ○ ★ & up	Duration options display based on the entered search terms, meaning that if no training that meets a user's search criteria has a rating of two stars, the ★★ & up filter does not display. The rating filter does not display if Course Ratings functionality is disabled for the user or if the related security object is disabled in the portal.
Provider	Multi-select check boxes	Providers related to the search results display alphabetically, all unselected by default	Provider options display based on the entered search terms, meaning that if, for example, no training items that meet the user's search criteria are associated with the provider Skillsoft, the **Skillsoft** filter option does not display. Inactive Providers may display if associated with the search results. When a large number of providers are displayed, a scroll-bar will appear within the section.

FILTER	SELECTION TYPE	OPTIONS	ADDITIONAL NOTES
Language	Multi-select check boxes	Languages related to the search results display alphabetically, all unselected by default	Language options display based off the text query (e.g. if no training returned in the results has an Available Language of 'Spanish', then 'Spanish' wouldn't display as a language option). The language filter will not display if only 1 language matches the training returned in the results (e.g. all training returned in the results has a language of 'English (US)', then the language filter won't display) When many, many languages are displayed, a scroll-bar will appear within the section.
Show Only Mobile Enabled	Enable/Disable toggle	All Training (toggle switch to Off position) - Default selection Mobile Enabled Training (toggle switch to On position)	The Mobile Enabled filter displays based on the entered search terms, meaning that if no training that meets a user's search criteria is mobile enabled, the entire **Show Only Mobile Enabled** toggle is hidden from the sidebar.

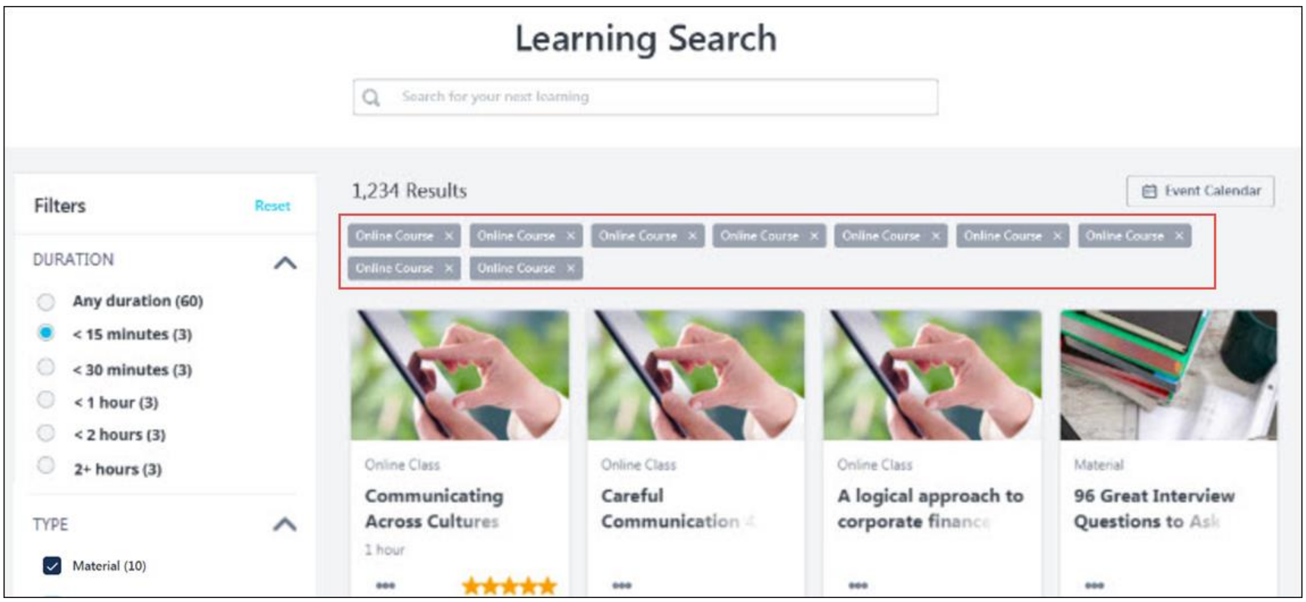
Learning Search - Filter Tags

To ensure users know when filters have been applied to the results on the Learning Search page, filter tags appear at the top of the page to indicate which filters have been applied. Tags display for each unique filter selection.

To access the Learning Search page, go to LEARNING > LEARNER HOME and enter search terms into the search bar at the top of the page and press Enter.

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



Tag Display Logic

The text in each tag matches the selected filter value in the filters based on the following logic:

- When the filter allows users to make a single selection, the filter tag displays the selected radio button (e.g. < 15 Minutes, 4 stars & up, etc.)
- When the filter allows users to make multiple selections, the filter tag displays all selected options. For example, if Material, Event, and Online Class were selected for the Type filter, all three training types appear as tags.
- When the **Show Only Mobile Enabled** filter is toggled to the On position, the filter tag displays the text, "Show Only Mobile Enabled." If the toggle is in the Off position, no tag displays.

Options

- Click the X icon to the right of a tag to remove the filter from the search.
- Click the Reset link to remove all filters and tags from the search at once.

Considerations

- Tags do not display for the default value that is automatically selected for a filter.
- Tags are ordered according to the order of filters in the filter sidebar, then by the order of the filter options within each section (e.g. Duration tags, then Type tags, then Subject tags, etc.)

Learning Search - Custom URL Filters

URLs can be configured to direct users to a pre-filtered Learning Search page. For example, an organization can configure a custom banner on the Learner Home page which, when clicked, directs users to the Learning Search page with results automatically filtered to a specific training provider. An organization can also send an email with a link that directs users to the Learning Search page with results filtered for only mobile enabled training. The following filters can be automatically applied to the Learning Search page via a custom URL:

- Text Search
- Duration Filter
- Type Filter
- Rating Filter
- Subject Filter
- Provider Filter
- Language Filter
- Mobile Filter

Note: *URLs are NOT be auto-populated when you apply filters to the page. This means that Custom URLs can only be constructed from manually, using the formulas below.*

Custom URL Filter Formulas

Depending on the filter type, the value(s) you add to the URL may include ID numbers, numeric values, true/false values, and more. See each filter type for information about how to construct the related custom URL:

Text Search Filter

To create a custom URL which directs users to the Learning Search page with training results filtered by a specific search text entry, construct a URL using the following formula:

Portal URL for Learning Search page **+** /ui/lms-learner-search/search?query=& **+** search term

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=leadership
  - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically filtered by the search term, "leadership."

Duration Filter

To create a custom URL which directs users to the Learning Search page with training results filtered by a specific search training duration selection or range, construct a URL using the following formula:

Portal URL **+** /ui/lms-learner-search/search?query= **+** &minDurationSeconds=X AND &maxDurationSeconds=Y

Note: *In this formula, X and Y refer to the minimum and maximum number of seconds, respectively.*

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&minDurationSeconds=1&maxDurationSeconds=3600
    - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically filtered for training items with a duration of < 1 Hour.
- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&minDurationSeconds=1&maxDurationSeconds=900
    - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically filtered for training items with a duration of < 15 Minutes.

DURATION	INPUT
< 15 Minutes	&minDurationSeconds=1&maxDurationSeconds=900
< 30 Minutes	&minDurationSeconds=1&maxDurationSeconds=1800
< 1 Hour	&minDurationSeconds=1&maxDurationSeconds=3600
< 2 Hours	&minDurationSeconds=1&maxDurationSeconds=7200
2+ Hours	&minDurationSeconds=7200

Type Filter

To create a custom URL which directs users to the Learning Search page with training results filtered by a specific training type, construct a URL using the following formula:

Portal URL **+** /ui/lms-learner-search/search?query= **+** &typeIds= **+** training type ID number (see table below for ID numbers)

Note: *To automatically filter the page for more than one training type, add additional type IDs to the URL, separated by commas.*

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=typeIds=8,64
    - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically to only include training results which are curricula or tests.

TYPE	ID
Curriculum	8
Event	2
Library	16384
Material	524288
Online Class	1

TYPE	ID
Program	134217728
Quick Course	4
Test	64
Video	67108864

Rating Filter

To create a custom URL which directs users to the Learning Search page with training results filtered by a specific minimum star rating, construct a URL using the following formula:

Portal URL + /ui/lms-learner-search/search?query= + &minRating=X

Note: *In this formula, X refers to the minimum number of stars. X must be 1 or higher and must be a whole number.*

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&minRating=3
  - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically filtered to only include training that has a Rating of 3 stars & up.
- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&minRating=5
  - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically filtered to only include training that has a Rating of 5 stars.

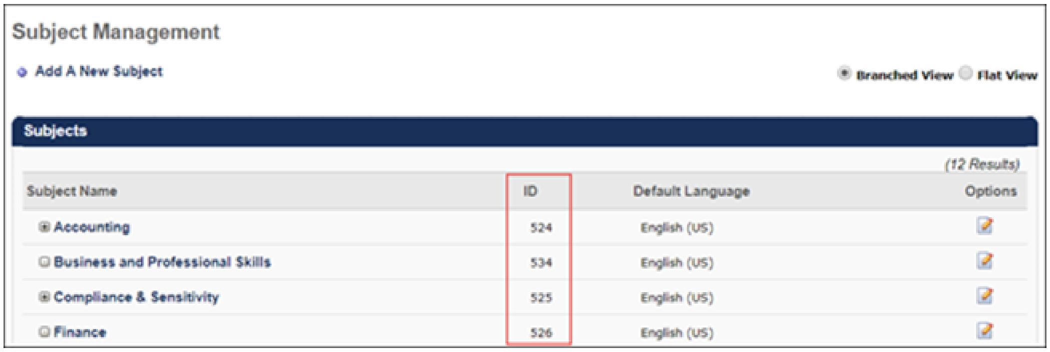
RATING	INPUT
5 stars	&minRating=5
4 stars & up	&minRating=4
3 stars & up	&minRating=3
2 stars & up	&minRating=2
1 stars & up	&minRating=1

Subject Filter

To create a custom URL which directs users to the Learning Search page with training results filtered by a specific subject, construct a URL using the following formula:

Portal URL + /ui/lms-learner-search/search?query= + &subjectIds= + Subject ID number (see Subject Management page in your portal for subject ID numbers)

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&subjectIds=617
  - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically to only include training results which are associated with the subject affiliated with the subject ID 617, which in the eds-talent.csod portal is "Orientation." Subject IDs are portal-specific.



To access the Subject Management page and retrieve a subject's ID, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > SUBJECTS.

Provider Filter

To create a custom URL which directs users to the Learning Search page with training results filtered by a specific training provider, construct a URL using the following formula:

Portal URL **+** /ui/lms-learner-search/search?query= **+** &providerIds= **+** Provider ID number (see Manage Online Vendors page in your portal for provider ID numbers)

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&providerIds=B7D65951-6EE6-4F9A-9E15-08CC95512675
  - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically to only include training results which are associated with the provider affiliated with the provider ID B7D65951-6EE6-4F9A-9E15-08CC95512675, which in the eds-talent.csod portal is "Skillsoft." Provider IDs are portal-specific.

To access the Manage Online Providers page and retrieve a provider's ID, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > PROVIDERS.

Language Filter

To create a custom URL which directs users to the Learning Search page with training results filtered by a language, construct a URL using the following formula:

Portal URL **+** /ui/lms-learner-search/search?query= **+** &languageIds= **+** Language ID number (see table below for ID numbers)

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&languageIds=34

- In this example, when the user navigates to the Learning Search page using the above link, training will be automatically filtered to only include training results in Chinese (Traditional).

LANGUAGE	ID
Arabic	28
Bahasa (Malaysia)	38
Bulgarian (Bulgaria)	31
Chinese (Simplified)	7
Chinese (Hong Kong SAR)	9
Chinese (Singapore)	8
Chinese (Traditional)	34
Croatian (Croatia)	40
Czech (Czech Republic)	21
Danish (Denmark)	26
Dutch (Netherlands)	18
English (Australia)	35
English (UK)	2
English (US)	1
Estonian (Estonia)	47
Finnish (Finland)	36
French (Canada)	3
French (France)	13
German (Germany)	4
Greek (Greece)	29
Hebrew (Israel)	27
Hungarian (Hungary)	39
Indonesian (Indonesia)	33
Italian (Italy)	10
Japanese (Japan)	6
Korean (Korea)	30

LANGUAGE	ID
Latvian (Latvia)	22
Lithuanian (Lithuania)	23
Norwegian (Bokmal)	24
Polish (Poland)	11
Portuguese (Brazil)	12
Portuguese (Portugal)	16
Romanian (Romania)	20
Russian (Russia)	5
Serbian (Latin)	48
Slovak (Slovakia)	41
Slovenian (Slovenia)	42
Spanish (Mexico)	14
Spanish (Spain)	15
Swedish (Sweden)	25
Thai (Thailand)	17
Turkish (Turkey)	19
Ukrainian (Ukraine)	32
Vietnamese (Vietnam)	37

Mobile Filter

To create a custom URL which directs users to the Learning Search page filtered to only display mobile enabled training or only training that is not mobile enabled, construct a URL using the following formula:

Portal URL + /ui/lms-learner-search/search?query= + &mobileOnly= + true OR false

- Example: https://eds-talent.csod.com/ui/lms-learner-search/search?query=&mobileOnly=true
    - In this example, when the user navigates to the Learning Search page using the above link, training will be automatically filtered to only include mobile enabled training results.

Multiple Criteria Considerations

Multiple types of filter criteria can be incorporated into a single custom URL. Multiple criteria types must be separated in the URL by an ampersand (&).

For example:

Example 1:

To filter the eds-train.csod.com Learning Search page for training associated with the search term, "leadership," and is also available in Spanish with a rating of at least three stars, the custom URL would be:

eds-train.csod.com/ui/lms-learner-search/search?query=leadership&languageIds=15,14&minRating=3

Example 2:

To filter the eds-train.csod.com Learning Search page for training that is less than fifteen minutes long and mobile enabled, the custom URL would be:

eds-train.csod.com/ui/lms-learner-search/search?query=&minDurationSeconds=1&maxDurationSeconds=900&typeIds=1&mobileOnly=true

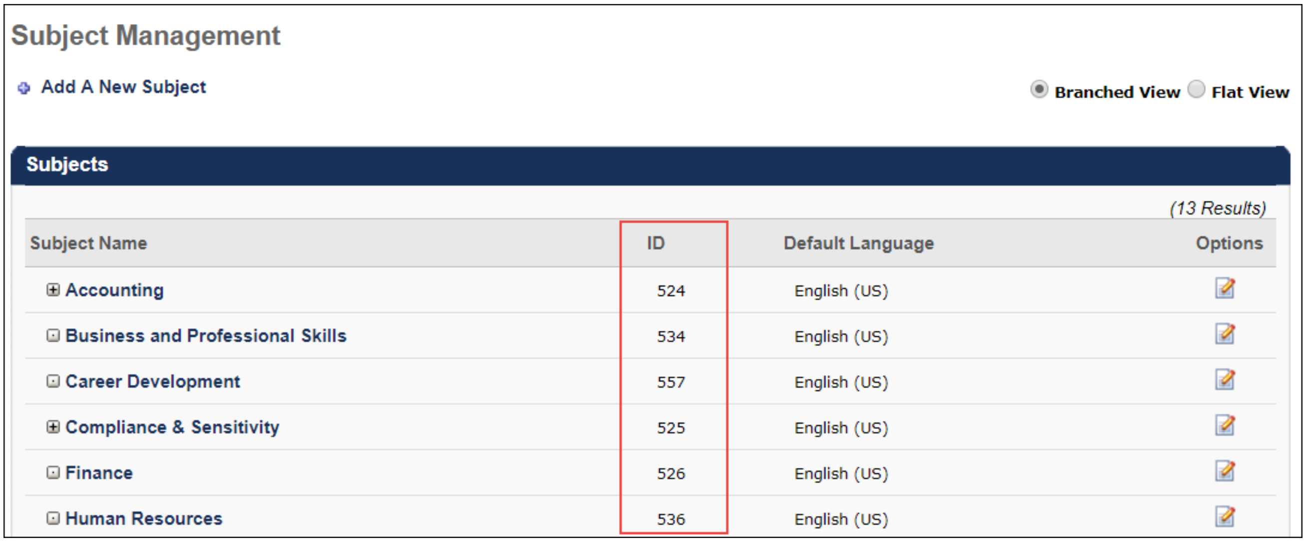
Considerations

All filters are case-sensitive and do not work if they do not EXACTLY match the criteria listed above (e.g. MaxDurationSeconds=900, LANGUAGEIDS=4, MobileOnly=true does NOT apply filters). The URLs must match the criteria exactly as written above.

Learning Search - Subject IDs

With this enhancement, an ID column has been added to the Subject Management page, to support the creation of custom Learning Search URL filters. Subject IDs can be used to create custom Learning Search URLs which can navigate users to the Learning Search page, pre-filtered for training associated with a specific subject.

See **Learning Search - Custom URL Filters** *on* page 251 *for additional information.*



Learning Search - Search and Filter Logic

The Learning Search logic for searching and filtering training is updated to provide a more intuitive user experience.

Search Logic

Each new text search resets the Learning Search filters to their default state, and each new text search resets the initial filter values. The initial filter values are based on the results returned for the text query. This is not limited just to what is on the page or what is in the user's availability.

Search Logic Example:

A user enters a search for the term, "product." Fifty training results are associated with the term and display on the page. When the user expands the Type filter, they see the following:

- Curriculum (20)
- Material (20)
- Online Class (10)

In this example, no other Type filter options display, because none of the training in the search results is any other training type. If no training meets the criteria for a filter option, the entire filter option does not display.

Filter Logic

- Filters are hidden if no values are associated with them. For example, if no subjects are associated with the training that appears in search results, then the Subject filter does not display.
- Numbers display in parentheses next to each filter value. These represent the number of results that will be returned on the page if the filter is selected. The numbers in the parentheses for each filter option always display the number of results that will be returned on the page if that option is selected. This number considers any other search criteria that has been entered or selected.

Offline Player Enhancements

Offline Player Enhancements - Overview

With this enhancement, the following updates are available for the Offline Learning application and the Offline Network Player:

- Online courses accessed through the offline player applications play in ALL browsers, as the Chromium mechanism which previously limited which browsers could be used is removed
- HTML5-based courses can now play in both offline player applications
- Courses automatically launch using the learner's default browser for both offline player applications
- Applications cannot be exited if a course is still running in either offline player application
- Applications refresh to the Offline Transcript page after closing a course window
- The Offline Learning application syncs with the transcript whenever an internet connection is available, not just according to the syncing schedule
- The Offline Network Player application includes a Branding App, like the Offline Learning application
- The Offline Network Player's offline transcript design is consistent with the online transcript design

Use Cases

Use Case 1: Viewing a Course on the Offline Network Player

Michael, an accountant at ABC Corporation, wants to view a course on the Offline Network Player application. Michael can launch the course using his default browser, and notices the new design of the Offline Transcript and course window. When Michael is done viewing the course, he tries to exit the application, but receives a warning message stating that the course is still running. Michael closes the course window and is redirected to the Offline Transcript page of the application, after which he is able to exit the application.

Use Case 2: Off-Schedule Auto Sync Using the Offline Network Player

Because Michael's device connected to the internet while Michael took the course, his progress data was automatically synced to the learning management system (LMS) immediately after he closed the course window.

Use Case 3: Playing an HTML5-based Course using Offline Applications

Tanya, a learning and development manager at an online training company, used to receive complaints from Michael about having trouble playing HTML5-based courses. Now that both offline applications have been reinstalled on employees' devices, with new enhancements in place, Tanya receives confirmation from Michael that his courses play smoothly.

Use Case 4: Branding the Offline Network Player

Tanya realizes that she didn't reinstall the Offline Network Player on her own device, so she is missing the new application branding functionality. She reinstalls the application and uses the application branding functionality to redesign the look of the Offline Network Player for all employees.

Considerations

- These enhancements do NOT apply to the Local Network Player application.
- AICC course types are excluded from these enhancements, as AICC courses are not supported by the offline applications.
- Browsers not included in the Cornerstone-defined browser list cannot be used to access offline courses.

Implementation

This functionality is NOT automatically enabled. To enable these enhancements, it is necessary to uninstall the current version and install the updated Offline Player applications. Once installed, the new application versions reflect all October '17 enhancements.

Permissions

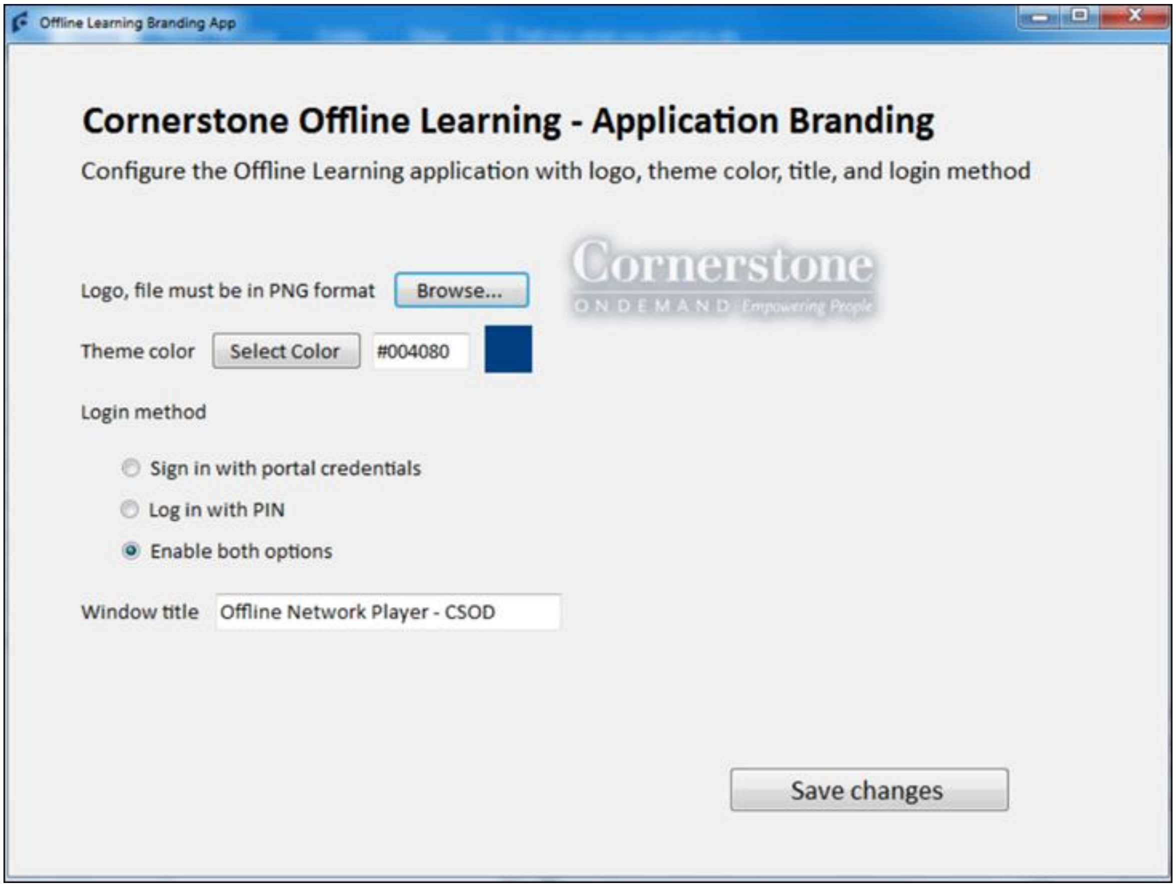
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offline Content	Grants ability to download and complete training items offline via a mobile device or the new Offline Player. This permission cannot be constrained. This is an end user permission.	Mobile
Offline Player Network Learning - Launch courses from a network location	Grants end users the ability to access and utilize the Offline Network Player. This permission is only available if the Offline Network Player is enabled. This permission cannot be constrained.	Learning

Application Branding

The Offline Learning Branding application previously enabled organizations to brand the Offline Player to match their organization's branding. The Branding application allowed administrators to configure the application logo, theme color, login method, and window title. With this enhancement, the Branding application is also available for Offline Network Player in addition to the Offline Player.

The Branding application is included in the Offline Network Player installation folder and in the Offline Player installation folder.



Branding Options

The following options are available within the Branding application:

- **Logo** - This option determines the logo image that is displayed within the Offline Network Player and Offline Network Player. Only .png files can be used for the logo image. The Cornerstone logo is used by default.
- **Theme Color** - This option determines the main color for the Offline Player. The theme color is used as the main color on the Login page, the button color, and the titles on the Transcript page. To select a theme color, click the **SELECT COLOR** button. Then, select one of the basic colors, or click the **DEFINE CUSTOM COLORS** button to specify

the hex color code for a specific color. Once a color is selected, it is displayed in the field to the right of this field.

- **Login Method** - Using the radio buttons, select which login methods are available to users. The following options are available:
  - Sign in with portal credentials - When this option is selected, only the Sign In option is available to users on the Login page.
  - Log in with PIN - When this option is selected, only the Log In with Pin option is available to users on the Login page.
  - Enable both options - When this option is selected, both login options are available to users on the Login page.
- **Window Title** - Enter the text that should appear at the top of the Offline Player window. The default value is Offline Learning.

Save Changes

Click the **SAVE** button to save any changes to the branding settings. The changes will be reflected in the Offline Network Player the next time the application is launched.

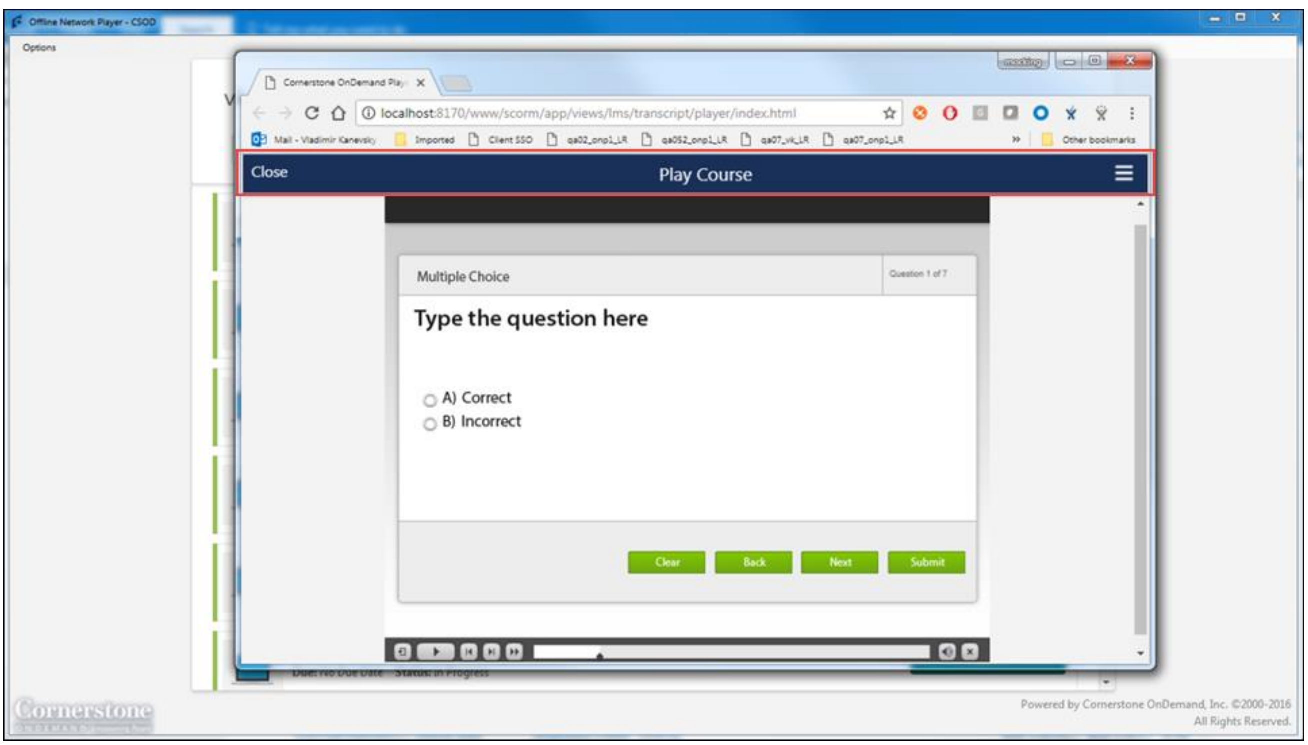
Course Window

With this enhancement, the **Close** and **Play Course** links at the top of the online course window no longer display when learners view an online course via the Offline Network Player or the Offline Learning application.

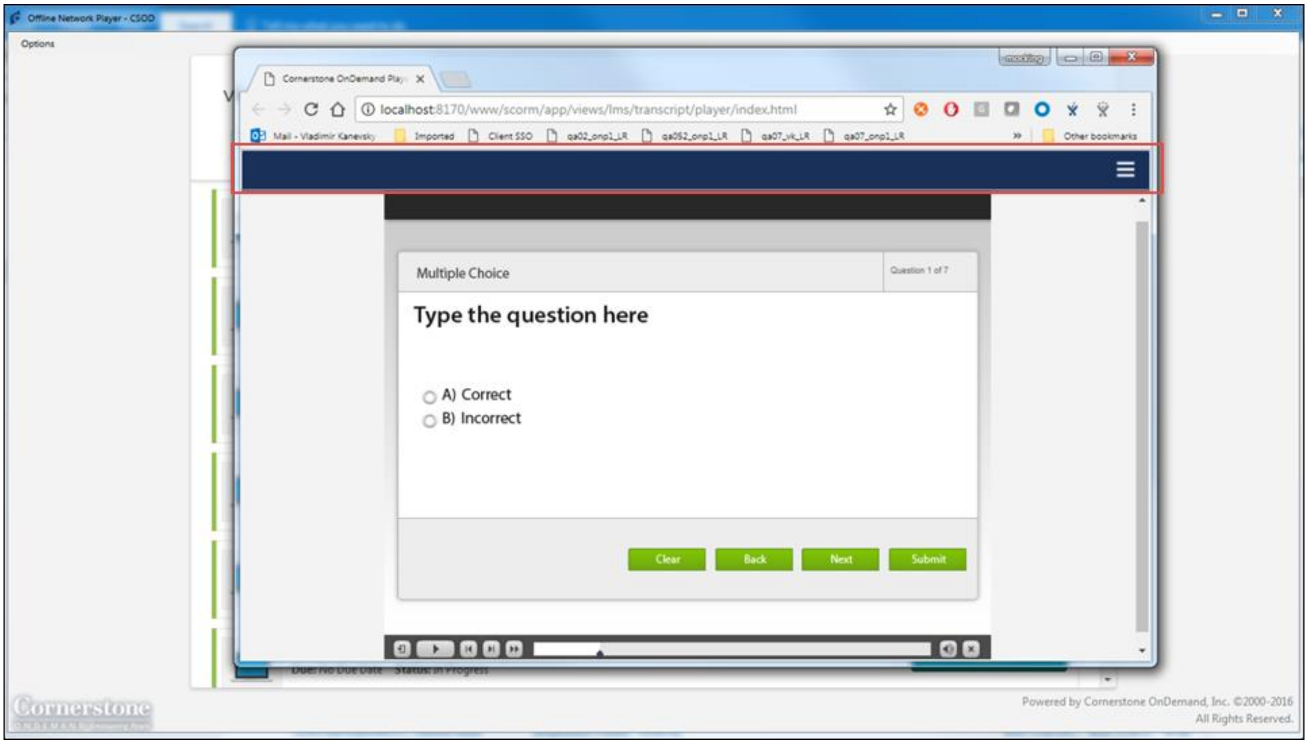
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offline Content	Grants ability to download and complete training items offline via a mobile device or the new Offline Player. This permission cannot be constrained. This is an end user permission.	Mobile
Offline Player Network Learning - Launch courses from a network location	Grants end users the ability to access and utilize the Offline Network Player. This permission is only available if the Offline Network Player is enabled. This permission cannot be constrained.	Learning

Previous Course Window Display



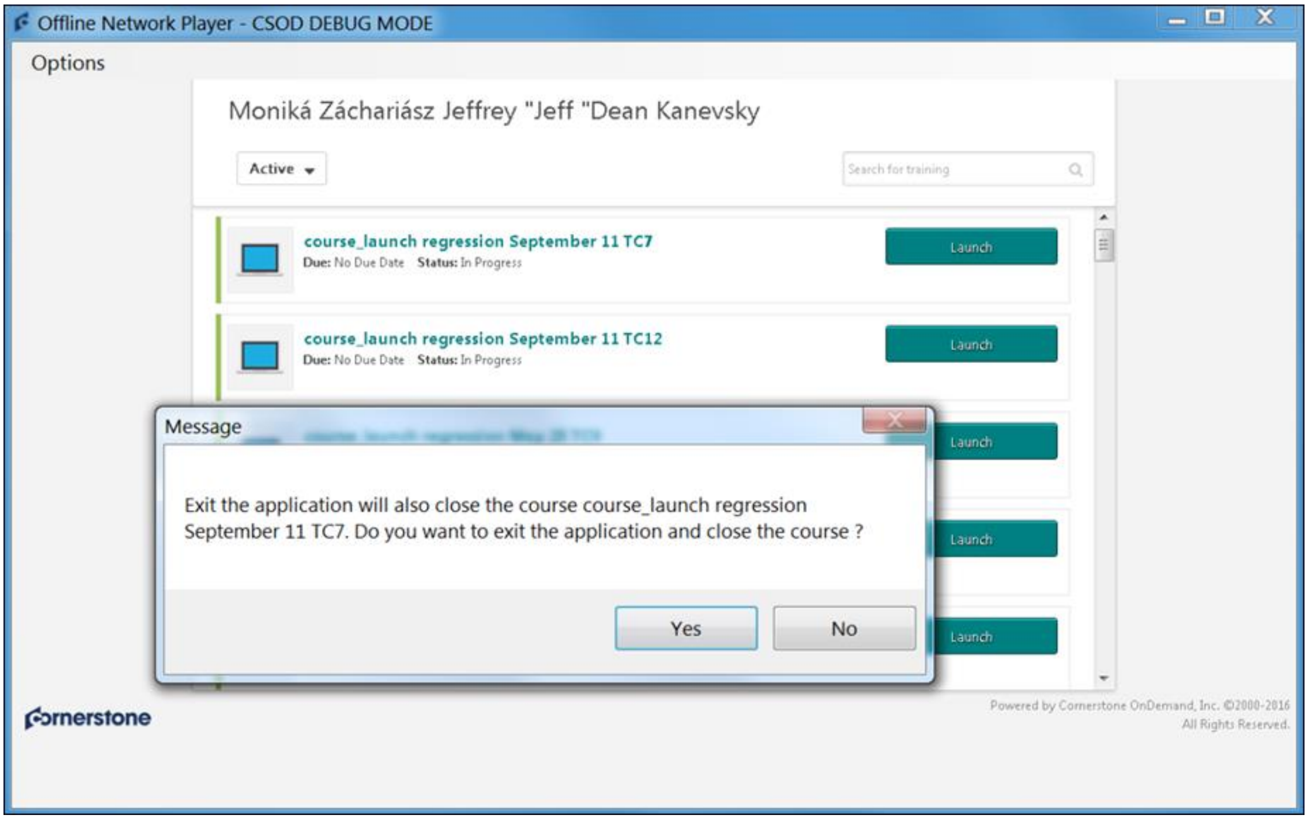
New Course Window Display



Exit Application

With this enhancement, if a learner attempts to exit an online course while an Offline Player application is still open, a pop-up window with a warning message appears, notifying the user that in order to close the course they must also close the application. If the learner clicks the **YES** button, both the application and the online course are closed. When the online course closes, the learner is redirected to the Offline Transcript page.

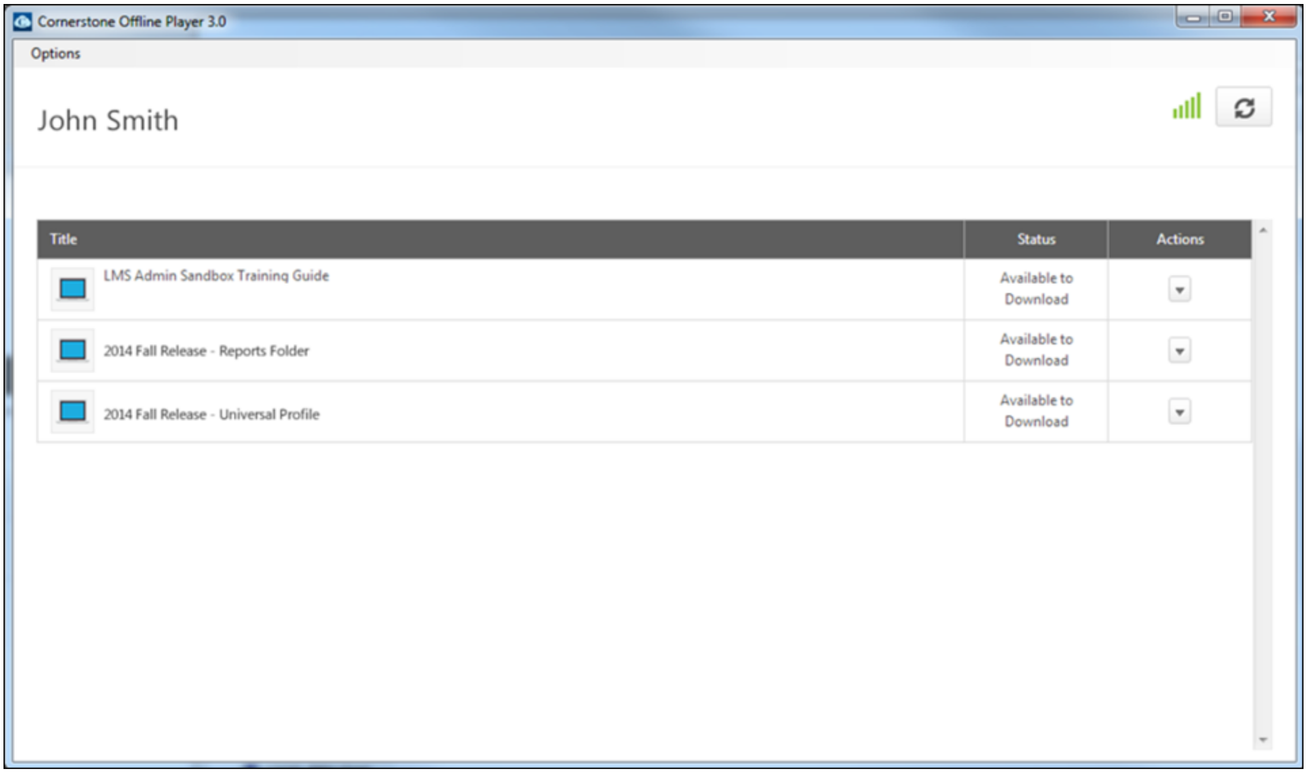
If the user clicks the **NO** button in the warning pop-up window, the course and application remain open.



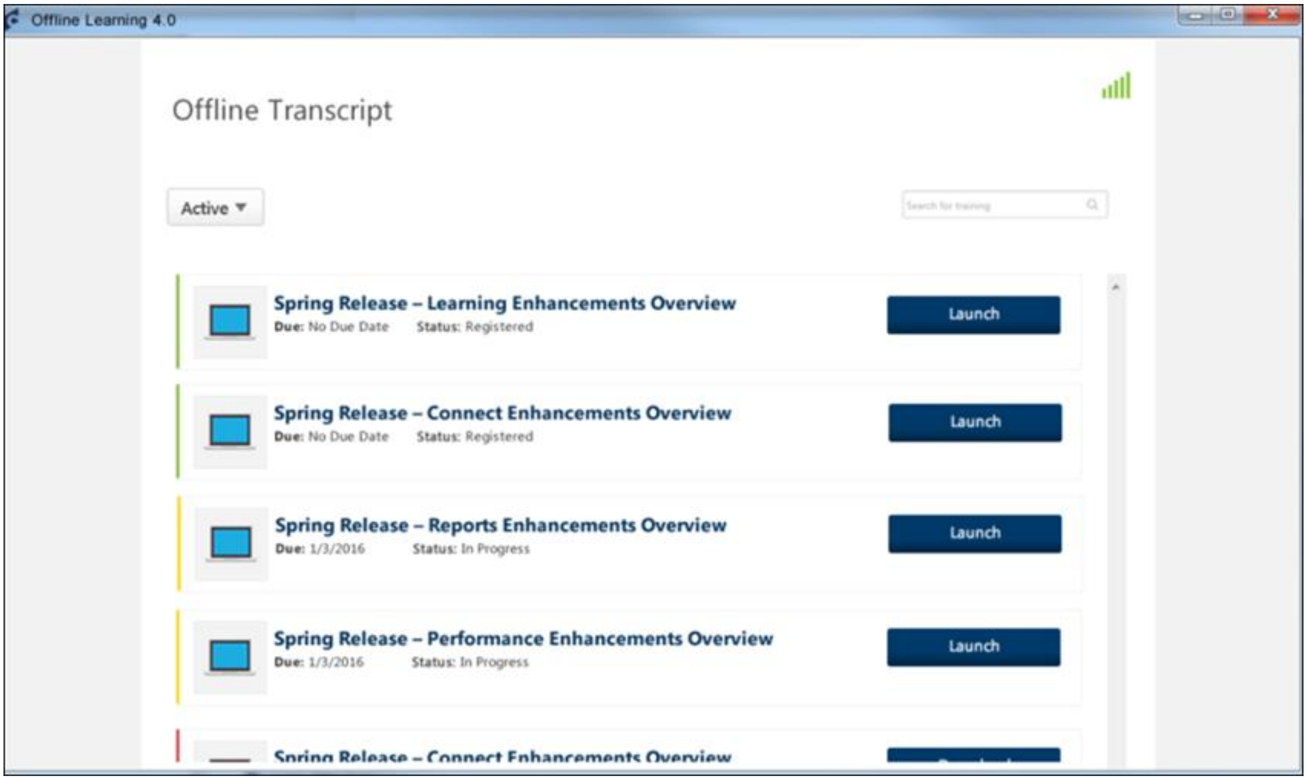
Offline Transcript

With this enhancement, the user interface (UI) of the Offline Transcript has been updated for the Offline Network Player to match the Offline Transcript for Offline Learning Application.

Offline Learning Application - Old UI



Offline Transcript - Updated UI



For more information about the updated Offline Transcript UI, *see Offline Player - Transcript.*

Pending Post-Work Transcript Status for Sessions

Pending Post-Work Transcript Status for Sessions - Overview

Prior to this enhancement, if a session had required post-work, the session would go into a status of In Progress after roster submission and then move to a Completed status once the post-work was completed. There was no status for Pending Post-Work for session, though this status was available for other types of training. Because the Pending Post-Work status wasn't available for sessions, it was not possible to report specifically on learners who had pending post-work training for a session they had attended.

With this enhancement, the Pending Post-Work status is now available for sessions. The status of Pending Post-Work/Past Due is also available when the session due date has passed, but the post-work has not yet been completed. This status is triggered when the roster is submitted for a session that includes required post-work. This allows administrators to track the progress and completion of sessions with post-work.

Use Case

Steve is an instructor at Acme Corporation. He recently held an instructor-led training session for ten people. The session included a post-work training item which learners were required to complete in order to receive a Completed status for the session. The post-work is a material that learners need to read and mark as complete.

Steve navigates to the session roster in the system. He confirms the users who attended the session and submits the roster. At the time of submission, five of the users had completed the post-work material. These users are moved to a Completed status for the session. The other five users have not yet completed their post-work material, so these users move to a Pending Post-Work status for the session. Steve is able to track users with a Pending Post-Work status and let them know they must complete the material post-work to receive credit for the session.

Considerations

- This enhancement does NOT include pre-work training or the Pending Pre-Work status. This status is not available for sessions with the Oct '17 release.

Implementation

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

Pending Post-Work Status on Transcript

With this enhancement, the following two statuses are applicable to instructor-led training (ILT) sessions:

- Pending Post-Work
- Pending Post-Work/Past Due

An ILT session moves to a Pending Post-Work status when all the following conditions are true:

- The session has associated post-work AND the post-work is required
- The user is marked as having attended the session
- The post-work associated with the session has not yet been completed

An ILT session moves to a Pending Post-Work/Past due status when all the following conditions are true:

- The session has associated post-work AND the post-work is required
- The user is marked as having attended the session
- The post-work associated with the session has not yet been completed
- The due date for the session has passed

After the user completes the required post-work for a session in a Pending Post-Work or in a Pending Post-Work/Past Due status, the status for the training moves to Completed.

Considerations

- A session does not go into a Pending Post-Work status when the post-work associated with the session is NOT required.
- A session does not go into a Pending Post-Work status if all required post-work is already completed prior to the user's attendance for the session being confirmed.
- If there is more than one required post-work item, the status remains in a Pending Post-Work status until all required post-work is completed.
- If the session has both required pre-work AND required post-work, and the pre-work is completed prior to roster submission, the session status moves to Pending Post-Work.
- If the session has both required pre-work AND required post-work, and neither are completed at the time of roster submission, the session status moves to In Progress. If the user completes the pre-work prior to completing the post-work, then the session status moves to Pending Post-Work, only if the roster is submitted again. If the user completes the post-work prior to completing the pre-work, the session status remains at In Progress.

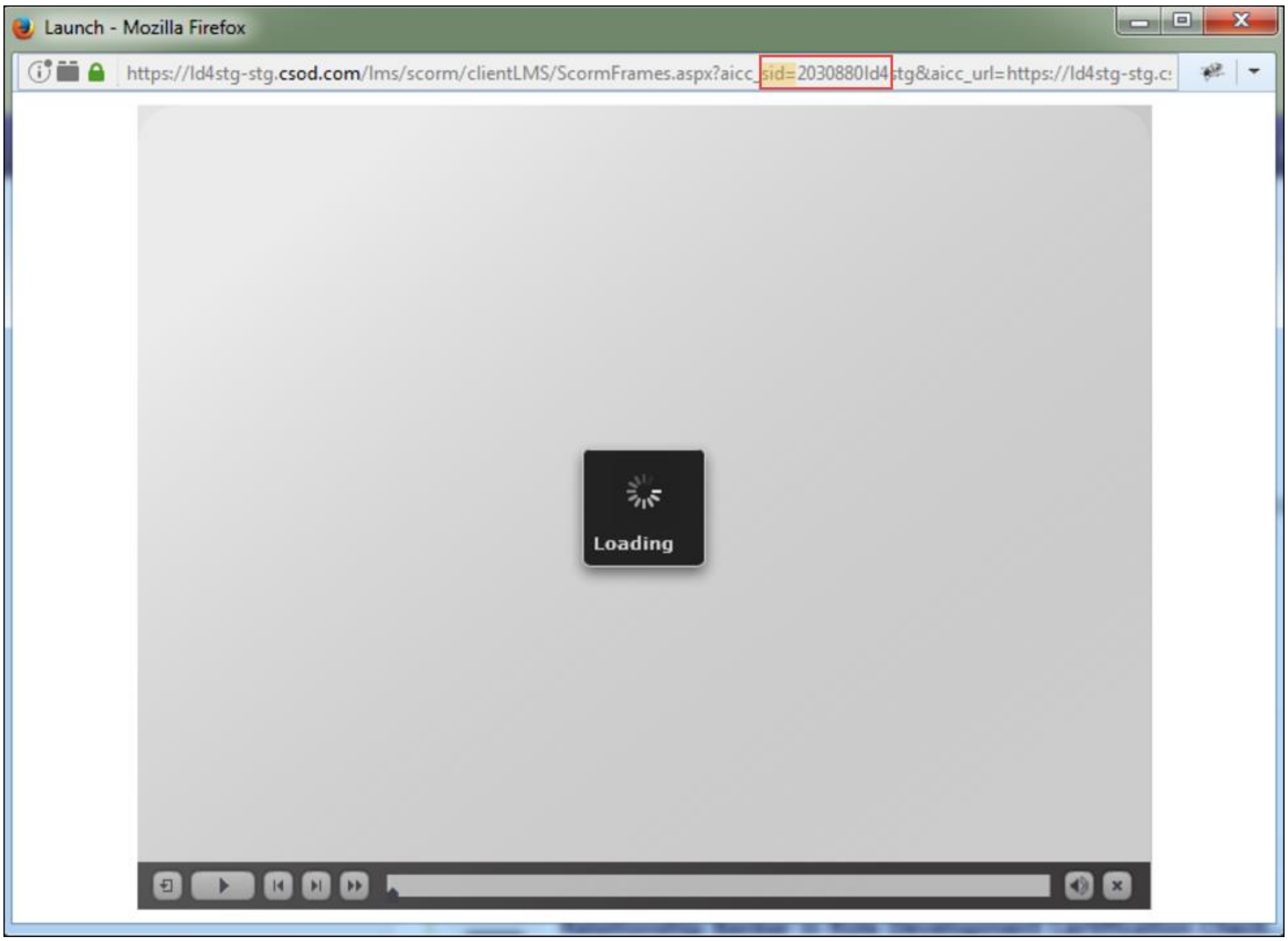
Content Security - AICC and SCORM 1.2 ID Encryption

With this enhancement, the session ID of SCORM 1.2 and AICC courses is automatically encrypted, and the Session ID value is visible in the URL when launching a course.

Implementation

With the October '17 release, SCORM 1.2 session ID encryption and AICC ID encryption are automatically enabled for all portals. If necessary, administrators can contact Global Product Support (GPS) to disable this functionality. There is no additional cost associated with this enhancement.

All requests to opt out of ID Encryption in Production environments must be submitted to Global Product Support (GPS) by Tuesday, October 17th.



TTS Integration Through Edge

TTS Integration Through Edge - Overview

Prior to this enhancement, it was necessary to configure the TTS integration via a request to Global Product Support (GPS). Without the integration in place, it was necessary for learning administrators to export courses and upload them to the Cornerstone Learning Management System (LMS) when they wanted to upload online classes from an LCMS system.

Following this enhancement, administrators can add, configure, and activate the TTS integration using Edge, without intervention from GPS.

Use Cases

Use Case 1: Configure TTS Integration

Jane is the learning administrator at ABC Inc. ABC Inc uses TTS as their LCMS provider, where they create and store AICC online classes. Jane wants the courses that are ready for publication to automatically appear in the Cornerstone LMS without manually exporting them from TTS and uploading them to the LMS.

Jane navigates to the Edge Marketplace, where she adds the TTS integration for no additional cost. On the configuration page, Jane populates the fields provided by TTS for the integration. Then, she clicks the **SAVE SETTINGS** button and activates the integration. Now the classes are updated from TTS on a daily basis. Once synchronized, Jane can manage the classes in the Course Catalog.

Use Case 2: Update Secret Key

After a few months of usage, TTS notifies Jane that she needs to update the secret key for the TTS integration. Jane navigates to Edge Integrations, where she clicks on the TTS integration, updates the new key in the dedicated field, and clicks the **SAVE SETTINGS** button. The next scheduled synchronization will use the updated key.

Use Case 3: Deactivate TTS Integration

ABC Inc decides to stop working with TTS as their LCMS provider. In order to stop the daily synchronization with TTS, Jane goes to Edge Integrations and switches the TTS integration off. No more synchronization calls will be made.

Considerations

If the TTS integration was previously enabled for your portal by GPS, you can continue using the existing integration. If desired, the existing integration can be deactivated by GPS, and you can reconfigure the integration via self-service using Edge.

Implementation

The TTS integration is automatically available, for no additional cost, in portals using the Edge module and the Learning module.

Permissions

The following existing permissions apply to this functionality:

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

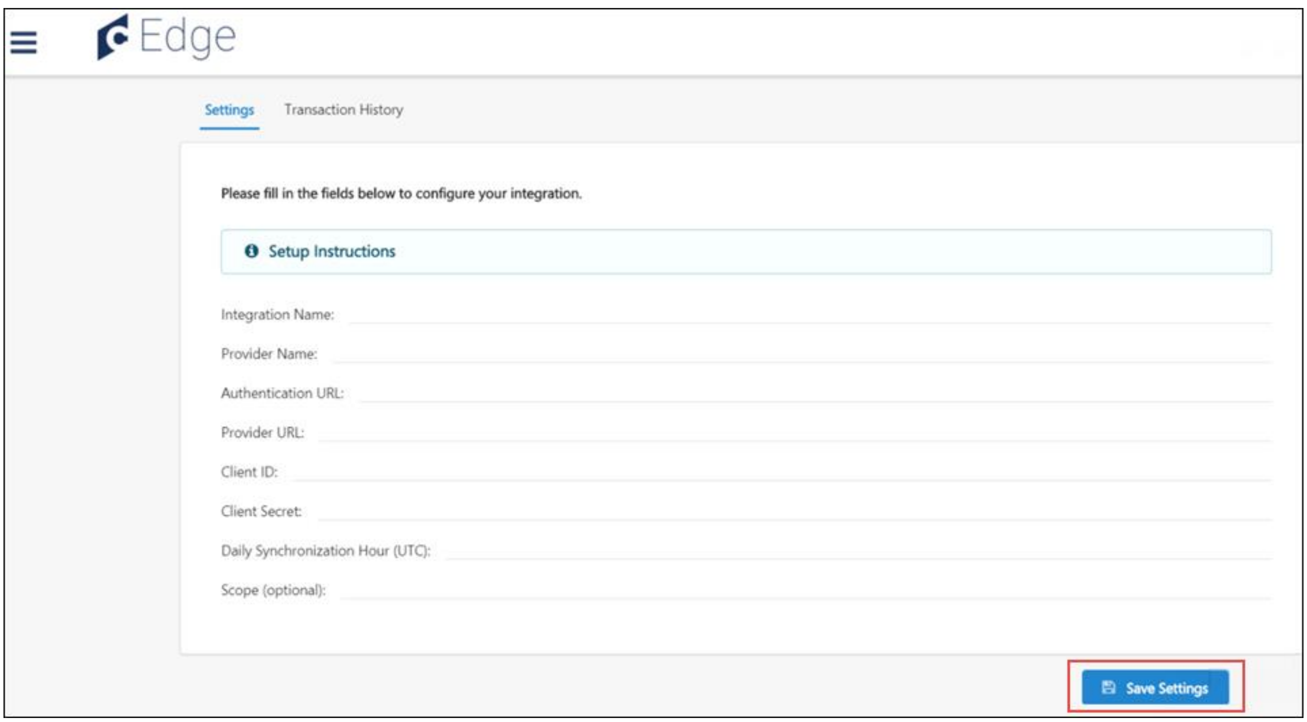
Configure TTS Integration

Administrators can self-configure the TTS integration via the Edge Marketplace and Edge Integrations.

To access the Edge Marketplace, go to ADMIN > TOOLS > EDGE and click the **Marketplace** link.

Permissions

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



Configure TTS Integration

To configure the TTS integration:

1. Use the Edge Marketplace search bar to search for the TTS integration. Click the TTS integration once it appears in the search results.
2. Click the **INSTALL** button. After the integration has been installed, you must configure its settings.
3. Click the **CONFIGURE NOW** button in the pop-up window that appears. You will be navigated to the Settings page for the integration.
4. Populate the settings fields. Some fields must be provided by TTS. More detailed information about the fields listed below is provided on the Setup Instructions page of the integration.
    - Integration Name
    - Provider Name
    - Authentication URL
    - Provider URL
    - Client ID
    - Client Secret
    - Daily Synchronization Hour
    - Scope (optional)
5. After populating all the required fields, click the **SAVE SETTINGS** button to finish the TTS integration configuration.

Synchronized AICC online classes are accessible from the following system areas:

- Course Publisher
- Upload History page (only available in portals with Content Publisher functionality enabled)
- Course Catalog

Course metadata is available from the following system areas:

- Course Catalog
- Course Console

Considerations

- Only AICC online classes can be synchronized.
- Courses are automatically published.
- The following fields must be provided by TTS prior to configuring the integration:
    - Authentication URL
    - Provider URL
    - Client ID
    - Client Secret
    - Scope (optional)
- Online Providers must be created before configuring the integration. New Online Providers can be added by Global Product Support (GPS).

Update TTS Integration Settings

To update the TTS integration after it has initially been configured, go to ADMIN > TOOLS > EDGE and click the **Integrations** link.

1. Click the TTS integration title.
2. Modify any available settings on the integration's Settings page.
3. Click the **SAVE SETTINGS** button at the bottom of the page. The changes are applied immediately.

Deactivate TTS Integration

To deactivate the TTS integration after it has initially been configured and activated, go to ADMIN > TOOLS > EDGE and click the **Integrations** link. Then, locate the TTS integration and toggle the switch next to the integration to the Off position. The integration is immediately deactivated.

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.

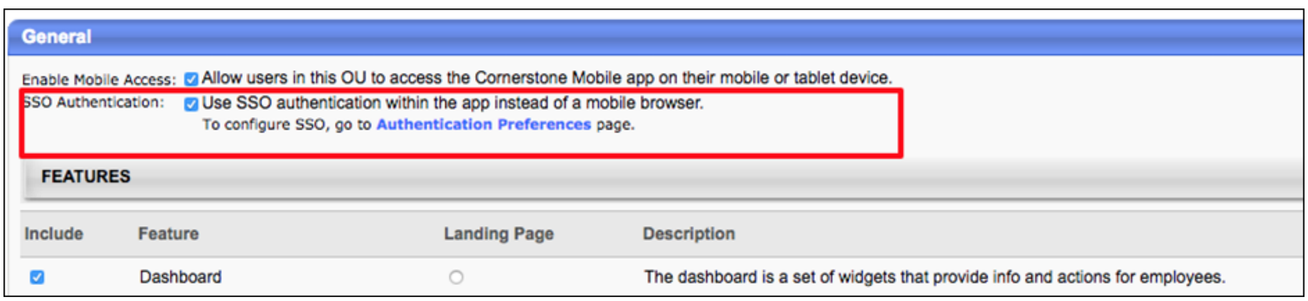
With this enhancement, administrators can configure the mobile application so that SSO authentication occurs within the mobile browser, as previously implemented, or to have the SSO authentication occur within the mobile application. This configuration is done within Mobile Preferences.

Note: *This functionality was released with the September 8 patch release.*

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

Performance

Custom Reports - Competency Fields

When creating a custom performance review report, the Performance Review Competency Section is renamed and enhanced to report on competency data from both Competency and Competency Assessment sections.

Performance Review Competency and Assessment Sections

The *Performance Review Competency* section in the Custom Performance Review Report is renamed to *Performance Review Competency and Assessment Sections*.

The following fields in the *Performance Review Competency and Assessment Sections* section are now displayed for Competency Assessment performance review sections:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Competency Description	This displays the description of the competency. The description does not include HTML or other formatting; it is displayed as plain text. This value is pulled from the competency within the performance review section.	Text
Competency Name	This displays the name of the competency. This value is pulled from the competency within the performance review section.	Text
Competency Rating Comment	This displays the comment that is associated with the competency rating within the performance review section.	Text
Competency Rating Commented By (Name)	This displays the full name of the user who added the comment to the competency rating within the performance review section.	Text
Competency Rating Commented By (ID)	This displays the user ID of the user who added the comment to the competency rating within the performance review section.	Text
Competency Rating Review Weight	This displays the weight associated with the competency. For Competency Assessment sections, no value is displayed.	Numeric
Competency Rating Score	This displays the score associated with the competency's rating. If no score is available, then N/A is displayed.	Text
Competency Rating Title	This displays the title associated with the competency's rating. For Competency Assessment sections, no value is displayed.	Text
Competency Version	This displays the version number of the competency. This value is pulled from the competency within the performance	Numeric

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
	review section.	

Use Case

A manager wants to run a custom Performance Review report to see how all of his subordinates scored on the previous year's review, by section. The sections he is particularly interested in are the Competency Section and Competency Assessment Section. Now, when he adds fields from the newly renamed "Performance Review Competency and Assessment Sections" section of the report, he will get data for each subordinate from both section types. Adding the Section Type field into the report tells the manager which competency data is derived from which section.

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

	User's Subordinates.	

Recruiting

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

Applications Fields

The following fields are added to the Applications section:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
External Applicant ID	This is the applicant ID for an applicant when going from an individual domain to one big one. This field allows you to pull a report with an external requisition ID and any other field that identifies to payroll so you can format a FTP delivery. This field is mainly used by portals that have an active WOTC TCC integration.	Numeric

Requisition Fields

The following fields are added to the Requisition section for Recruiting Custom Reports and Multi-Module Reports:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Requisition Creation Date	This field shows the date the recruiter created the requisition. The value is stored in the system in Coordinated Universal Time (UTC), but when viewing the value in the report, the value displays in the user's local time.	Date

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
	Related fields: ○ **Requisition Date Opened:** This is the date the requisition went into the Open status. This field could differ from the creation date if there was an approval required. For example, the requisition could have been created on 21 July but not approved until 24 July. In this case the date opened would be 24 July. ○ **Requisition Approval - Date:** The requisition approval date may match the requisition date opened, but it could also differ if there are multiple sequential approvers and they are approving on different dates. ○ **Requisition Date Posted:** A requisition may not be set to post until a few days after it is created. Therefore, if a requisition is created on 21 July, the recruiter may not set it to post until 27 July.	
Requisition Primary Owner - Email	This field displays the email address of the requisition primary owner.	Text
Requisition Owner - Email	This field displays the email address of the requisition owner.	Text
Hiring Manager - Email	This field displays the email address of the hiring manager.	Text

Data Load Wizard Enhancements

In order to support the User Record - New Fields enhancement, two new fields are added for User data loads:

- Personal Email - This field stores the user's personal email address that is not a company-provided email address. This field is optional and is a text field. This value should be unique. This field is available for Cornerstone HR and non-Cornerstone HR User loads.
- Rehired Employee - This field indicates whether the user was previously with the company and rehired. This field should only be provided when the user's User Type is set to Employee, Contractor, Intern, or Temporary. This field is optional and accepts Yes, No, Y, or N. This field is only available for non-Cornerstone HR User loads.

In addition, when uploading the Reason for Change values, Termination and Rehire are now accepted values as long as they are active reasons for change within the system.

Implementation

This functionality is automatically enabled.

- Personal Email - This field is available for Cornerstone HR and non-Cornerstone HR User loads.
- Rehired Employee - This field is only available for non-Cornerstone HR User loads.

The ability to upload Reason for Change values is only available for Cornerstone HR User loads.

Security

The following existing permission applies to this functionality:

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

Manage Hired Applicants UI Redesign

With this enhancement, the user interface for the Manage Hired Applicants page is updated to match current styles.

As part of a separate enhancement for the October '17 release, a Rehire column is added to the page to identify former employees who have been rehired. *See* **System Actions for Rehired Employees** *on* page 296 *for additional information.*

There are no other functionality changes to the Manage Hired Applicants page.

To access the Manage Hired Applicants page, go to ADMIN > TOOLS > RECRUIT > HIRED APPLICANTS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Manage Hired Applicants	Grants ability to access and manage Manage Hired Applicants and also access the Users page and the Add/Edit User page via the Manage Hired Applicants page. This permission can be constrained by OU. This is an administrator permission.	Recruiting

Preboarding OU Configuration Auto-Upgrade

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 was part of the August '17 release.

Rehires Enhancement

Rehires Enhancement Overview

The Rehires enhancement enables you to recruit and rehire former employees who are eligible for rehire. This functionality is especially beneficial to organizations that have seasonal positions and would like a more efficient hiring process for such jobs.

Prior to this enhancement, multiple candidate profiles were created for users who were rehired. In addition, former employees who were inactivated when terminated encounter an error when applying to a job. There was no ability to search and look for former employees to recruit them. Further, the user's personal email address was lost because it was overwritten by their company email address upon hire.

Eligible for Rehire Step

When an employee leaves the organization, it will be necessary to identify them on their user record as eligible for rehire in order for the system to recognize them in the future if they apply to the company again. To identify an employee as eligible, the **Eligible for Rehire** field on the User Record page must be selected.

If the **Eligible for Rehire** field is set to "Ineligible" for the terminated employee who applies to the company using their previous email address, they automatically will be dispositioned because **the system will identify them as not eligible for rehire**.

For more information about the **Eligible for Rehire** *field on the user record,* ***see the User Record - User Type and Employment Status topic in Online Help****.*

Note: *Current employees should not be marked as eligible for rehire. This should only be done for employees who leave the company.*

Implementation

This functionality is automatically enabled for all portals using the Recruiting module. Effective dating functionality is only available for portals with Cornerstone HR enabled.

Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Manage Hired Applicants	Grants ability to access and manage Manage Hired Applicants and also access the Users page and the Add/Edit User page via the Manage Hired Applicants page. This permission can be constrained by OU. This is an administrator permission.	Recruiting
Recruiting: Search Candidates	Grants ability to access Candidate Search page for recruiting, which enables searching for internal candidates and external candidates who have applied for open positions. This permission also enables the Invite to Apply action item to appear in the Actions drop-down on the	Recruiting Administration

	Search Candidates - Search Results page. This permission can be constrained by OU and User's OU.	
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting
Requisition Preferences - Manage	Grants ability to access and manage Requisition Preferences. This permission cannot be constrained.	Recruiting Administration
Users - Effective Dating: Manage	Enables administrator to make effective dated changes to the user record. This permission only works when used in conjunction with the Users - Edit General Information permission. This permission cannot be constrained. This is an administrator permission.	Core Administration

Requisition and Applicant Preferences

A "Not Eligible for Rehire" disposition is added to Requisition and Applicant Preferences. Applicants who are previous employees but who are not eligible to be rehired are automatically removed as applicants by this disposition.

- **Disposition Type** - This is a default disposition.
- **Active** - Active by default. The **Active** box cannot be modified.
- **Emails** - No emails are configured by default. Select **None** in the Default Email column to configure the **Default** or **Default with Custom Message** email. *See Requisition and Applicant Preferences - Dispositions* for detailed information about configuring disposition emails.

Note: *A former employee is not eligible for rehire if the* **Eligible for Rehire** *field on their user record is set to "Ineligible." When ineligible for rehire, and the former employee applies for a job, their application is automatically dispositioned by the "Not Eligible for Rehire" disposition because the system deems them ineligible for rehire.*

System Actions for Rehired Employees

When employees are rehired, the following occurs in the system, based on the stage of the rehiring process.

Onboarding

When onboarding rehired employees through the Start Onboarding process on the Applicant Profile page, the following occurs in the system:

1. The user record is marked as Rehired Employee.
2. The **Eligible for Rehire** field on the user record is no longer checked once the user changes from Terminated to Onboarding.
3. The user's organizational units and employee relationships are reset based on the values defined during onboarding.

If onboarding is canceled, the above are reverted.

Manage Hired Applicants

Since rehired applicants will have a user record in the system, you can update their user record via Manage Hired Applicants by clicking **UPDATE** from the Employee Info column. The following occurs in the system:

- The user is identified as a rehired applicant in the new Rehire column on the Manage Applicants page. The column displays "Yes" for rehired applicants and displays "No" for non-rehired applicants.
- The user's organizational units and employee relationships are reset based on the values defined in the user record.
- The user's security roles are reset. **Note:** *For former employees who are rehired, their previous security roles will be removed, and they will once again be placed into security roles like any other new user.*
- The user record will be populated with the values from the job requisition for which the user was hired.
- Effective dating records are maintained for portals with Cornerstone HR enabled.
- The **Rehired Employee** field is preset on the user record.
- The user's personal email address that was used on the career site is populated in the **Email** field.

Frequently Asked Questions (FAQs)

How is a former employee eligible for rehire?

A former employee is eligible for rehire if the **Eligible for Rehire** field is selected in the User Type and Employment Status section on the User Record page. The **Eligible for Rehire** field only displays if **Terminated** is selected in the **Employment Status** field on the user record. The personal email address also allows recruiters to reach out to former employees who are eligible for rehire.

How does the *Personal Email Address* field impact the rehire process?

The **personal email address** on the user record is necessary so that when a former employee applies for a job using the same personal email address, the former employee is associated with that user record and the system recognizes that they are eligible for rehire (provided that the **Eligible for Rehire** field was selected for the user on their user record).

How is a former employee, who applies for a job with the company, converted to an external applicant?

When the Applicant Tracking System (ATS) detects that there is activity in the career site for a terminated user, ATS uses a backend setting to convert the terminated inactive user back to an external applicant user.

Note: *If the user is ineligible for rehire, they are automatically dispositioned by the **Not Eligible for Rehire disposition**.*

Personal Email Address

Having a personal email address on the user record helps recruiters when trying to contact former employees regarding open jobs.

The personal email address also helps former employees log in to the career site as a candidate and apply to a job without having to create a new account. The career site account will be associated with the candidate's user record via their personal email address that remained on file with the organization.

This personal email address is also used in the following other areas of the Applicant Tracking System (ATS) for former employees:

- **Add to Requisition** - When a former employee is manually added to a requisition (via **Manage Applicants** or **Candidate Search Query**), the email address that the applicant provides when submitting their application via the career site will be populated on their user record.
- **Recruiting Agency Submission** - When a former employee is submitted via a recruiting agency, the email address that is entered in the **Email Address** field on the **Submission Details pop-up** when submitting the applicant will be populated on their user record.
- **Career Site** - The personal email address that the former employee uses on the career site will also populate the **Email** field and the **Personal Email Address** field on the user record. If a former employee is hired, then when the **Email** field on the user record is populated with the hired employee's company email address, their personal email address will still be available on the user record.

Note: *The* **Personal Email Address** *field is part of a separate enhancement for the October '17 release. For more information,* ***see the New User Record Fields enhancement in Online Help.***

User Record - Effective Dating for Rehires

Effective dating records for rehired employees are maintained through multiple cycles of employment. This enables you to maintain a full record for the employee over time.

The employee's record is maintained when onboarding is started. If onboarding is canceled for a rehired employee, records of effective dated changes that have already taken place will ***not*** be removed.

Note: *Effective Dating features are only available for portals with* ***Cornerstone HR*** *enabled.*

Candidate Search Query

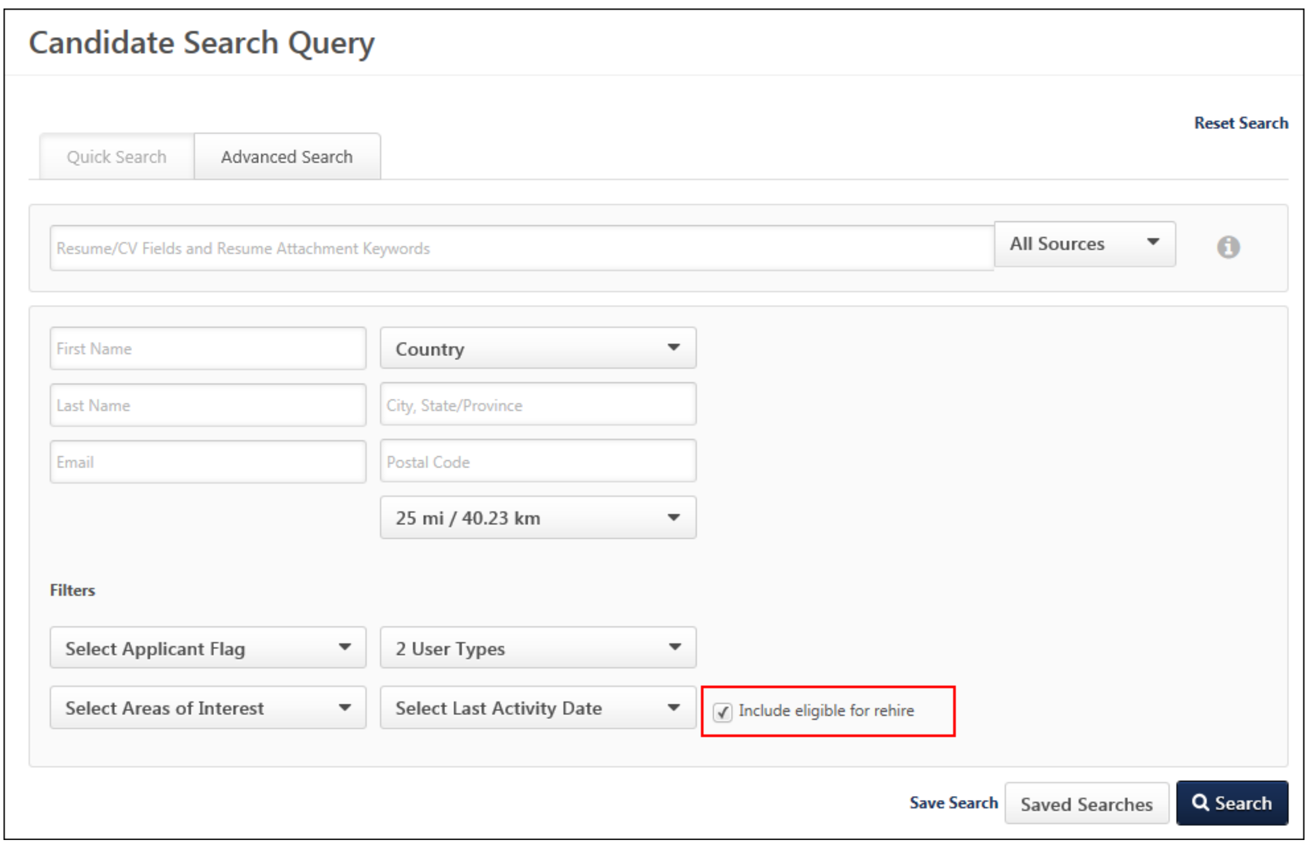
With this enhancement, when past employees apply for a job, they can be searched for on Candidate Search Query. A new field, **Include eligible for rehire**, has been added to the Quick Search and Advanced Search tabs, as well as the search results page. The field is selected by default and enables past employees to appear in the search results.

Having former employees in the search results helps recruiters when they want to reach out to these former employees to apply to open jobs.

To access Candidate Search Query, go to RECRUIT > CANDIDATE SEARCH QUERY.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Recruiting: Search Candidates	Grants ability to access Candidate Search page for recruiting, which enables searching for internal candidates and external candidates who have applied for open positions. This permission also enables the Invite to Apply action item to appear in the Actions drop-down on the Search Candidates - Search Results page. This permission can be constrained by OU and User's OU.	Recruiting Administration



Search Results

If users in the search results are eligible for rehire, they are identified by an **Eligible for Rehire** field in their user card.

Note: *Users who are not eligible for rehire do not appear in the search results.*

Email/Invite to Apply/Add to Requisition/Add to Talent Pool

When taking actions on candidates who are former employees and are identified as eligible for rehire, the candidate is converted to an external candidate. This means that the candidate will be treated in the system like any other external candidate.

Their personal email address will be copied to their profile page in the career site.

Saved Searches

When saving searches that include the eligible for rehire criteria, the criteria displays in the criteria list for the saved search.

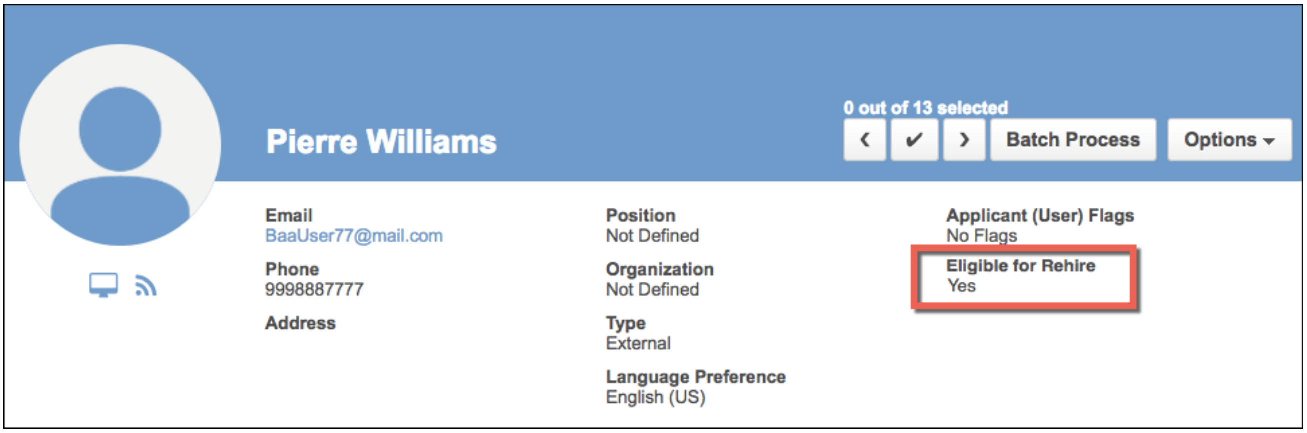
Consideration for Compliance Enablement Preferences

If the **Hide internal users that have not completed an application in Candidate Search** option is enabled in Compliance Enablement Preferences, then employees who are eligible for rehire are not included in the search results.

Applicant Profile Page

With this enhancement, when past employees apply for a job, the Applicant Profile page displays an **Eligible for Rehire** field if the user has been marked as eligible to rehire. This helps identify when an applicant is a past employee.

The field will indicate "Yes" when eligible for rehire.



Applicant Experience

When a former employee applies for a requisition, they will experience the following:

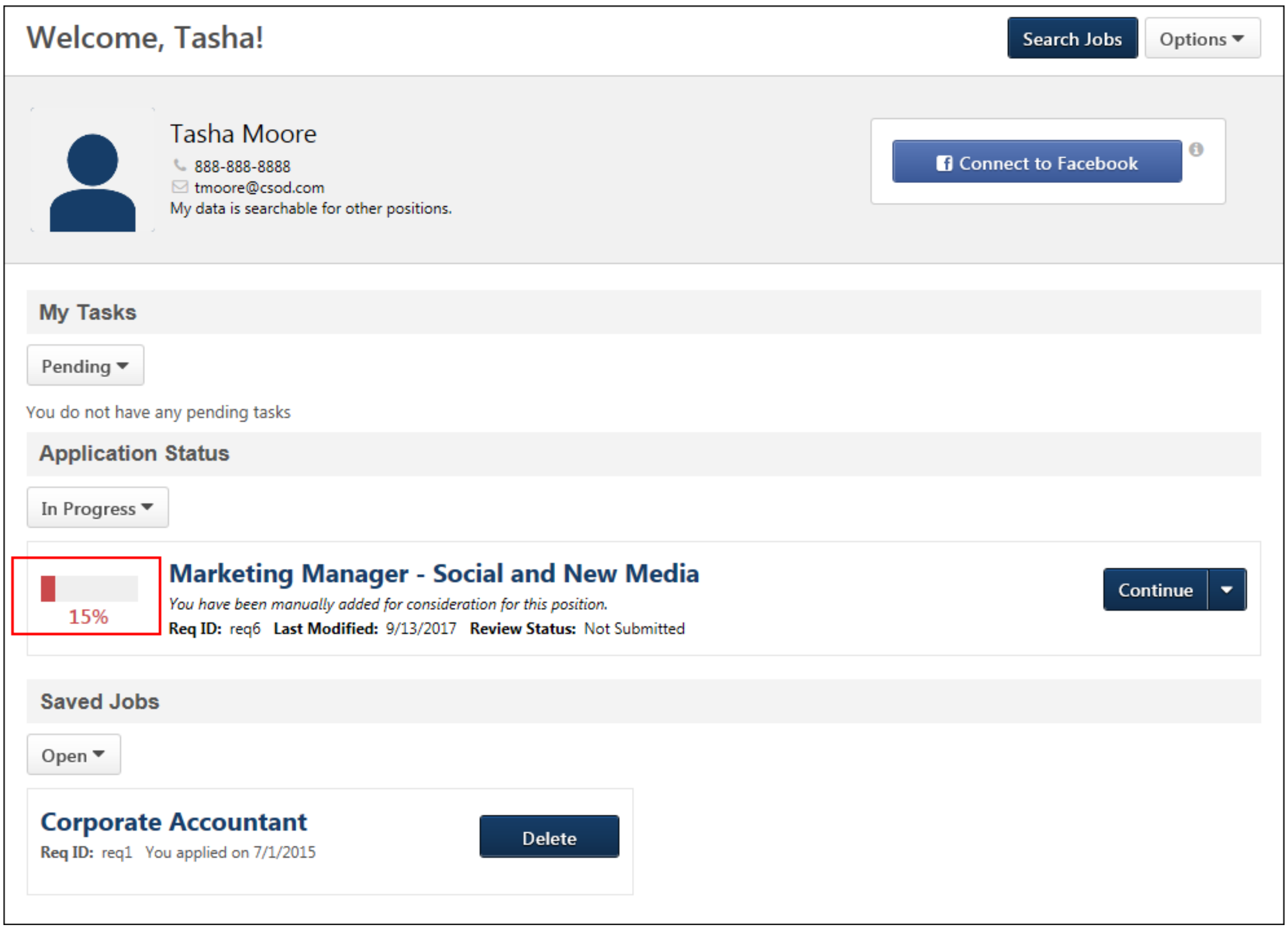
- **Related Requisitions and Dispositions** - If a former employee applies to related requisitions and is dispositioned from one of them, they are also dispositioned from the other requisitions to which they applied.
- **Reset Password** - When former employees attempt to access the career site, they will be sent an email to reset their password. This allows them to access the career site and apply for jobs using their previous applicant information.
- **Personal Email Address** - The personal email address that the former employee uses on the career site will also populate the **Email** field and the **Personal Email Address** field on the user record. If a former employee is hired, then when the **Email** field on the user record is populated with the hired employee's company email address, their personal email address will still be available on the user record.
- **Apply with Seek/LinkedIn** - Former employees who apply via Seek or LinkedIn using the same email address that matches a previous email address in the system will be informed that they already have an existing account in the career site. This prevents the creation of duplicate applicants.

My Profile - Application Progress Enhancement

The progress percentage that displays on an applicant's My Profile page in the career site and the Applications tab in Career Center has been removed with this enhancement. Applicants will no longer see a percentage of progress for their applications.

On the career site, applicants will Instead see "Complete" or "In Progress" rather than a percentage. On the Applications tab in Career Center, the Application Status column has been removed.

Note: *Administrators will continue to add percentages to the application workflow, but the values will no longer be visible to applicants. This change is occurring in preparation for a future enhancement that will change the application workflow tracking process from percentages to page-by-page.*



Succession

Succession Task Redesign- All Tasks 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 were created following the release were automatically upgraded to the new design.

With the October 2017 release, all new and existing succession tasks 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 succession tasks that were created following the release were automatically upgraded to the new design.
- With the October 2017 release, all new and existing succession tasks 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	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. On the Learner Home page, this permission also allows end users to view the **Completions & Hours** field, the training sidebar, and the Continue Learning carousel. This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. **Note:** *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.*	Universal Profile
Candidate Search	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.	Talent/Succession - Administration
Corporate Preferences - Manage	Grants ability to manage Corporate Preferences, which includes several portal-wide settings. This is an administrator permission.	Core Administration
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
Snapshot - Competencies	Enables user to view the Competencies widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. **Best Practice:** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile

Snapshot - Development Plans	Enables user to view the Development Plans widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. **Best Practice:** *For most users, this permission should be constrained by User Self and Subordinates.*	Universal Profile
Snapshot - 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:** *For most users, this permission should be constrained by User Self and Subordinates.*	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:** *This permission* is not *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.*	Talent/Succession
Talent Profile - View	Allow managers to view an employee's Talent Profile, which provides a quick view of the user's User Record, Resume, 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	Talent/Succession

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