



## Cornerstone November 2022 Release Notes

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# Release Notes for November 2022

# What's New for November '22

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 November '22 Release](#) on page 18 *for additional information.*
- **New Reporting Fields** - This topic provides a list of all reporting fields that are newly added with this release. [See List of New Report Fields for November '22 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 November '22 Release](#) on page 26 *for additional information.*
- **Past Releases** - This topic contains links to past release overviews. [See Past Release Notes.](#)

*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 November '22 release:

## Careers Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Check-Ins Usability Enhancements</b>	Yes	With this release, Check-Ins improves usability and consistency across many different screens.
<b>Reporting Fields - Check-Ins</b>	Yes	With the November '22 Release, the following updates have been made to Reporting 2.0: <ul style="list-style-type: none"><li>○ New Check-Ins &gt; Check-In Notes fields have been added</li><li>○ New Check-Ins &gt; Check-In Follow Ups fields have been added</li></ul>
<b>Skills in Check-Ins</b>	Yes	With this release, within Check-Ins, users can select the skills icon to access their Skills Profile, add and remove skills, and search for new skills.

## Content Anytime Features

FEATURE NAME	DESCRIPTION
<b>Content Anytime - Q4 Updates</b>	<p>Refreshes to Content Anytime and À La Carte subscriptions occur every month! New titles are added to libraries monthly and removals occur quarterly. Content Anytime subscribers automatically receive their subscription refreshes.</p> <p>Target dates for Q4 refreshes are listed below. Please refer to the 2022 Content Refresh Calendar for the timing of refreshes for all of 2022.</p> <ul style="list-style-type: none"><li>○ October 7 – October 14: Additions Only</li><li>○ November 11 – November 18 : Additions Only</li><li>○ December 9 – December 16 : Removals &amp; Additions</li></ul>

## Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Accessibility Enhancements</b>	Yes	<p>The following improvements to accessibility have been made with this release:</p> <ul style="list-style-type: none"><li>○ <b>Learning Accessibility Enhancements</b></li><li>○ <b>Reporting 2.0 Accessibility Enhancements</b></li></ul>
<b>Capability Models</b>	Yes	<p>With the November '22 Release, administrators can create Capability Models to set skill requirements for specific groups in the organization. With Capability Models, administrators define key skills for an audience by selecting one or more organizational units to align to the model and selecting critical skills those users should either have or be developing. Critical skills are suggested based on the Capability Model details or can be searched for by keyword.</p>
<b>Deprecation of Custom Reports - Phase 2</b>		<p>The deprecation of Custom Reports that began with the August '22 release will continue with Phase 2 of the deprecation occurring with the November '22 Release. The deprecation is implemented in phases to give customers time to prepare and to complete their migration to Reporting 2.0. With Phase 2, some Custom Reports features are removed. Please</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		review the Deprecation phases and their milestones at the end of this deprecation announcement.
<b>Deprecation of User and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) - November '22 Update</b>		<p>Ability to perform Users and OU data loads and feeds using DLW was deprecated with an end-of-life in the May '22 Release for most customers. Some customers were excluded from the May '22 deprecation schedule due to missing feature parity in Edge Import.</p> <p>Most of the missing parity features those customers were dependent on became available in Edge Import with the August '22 Release:</p> <ul style="list-style-type: none"> <li>○ Group and Group Membership loads</li> <li>○ Employee load enhancements: <ul style="list-style-type: none"> <li>○ GUID based create employee method and employee relationship fields support</li> <li>○ Applicant to Employee conversion feature (Recruit)</li> </ul> </li> </ul>
<b>Developer Portal Replaces API Explorer and Edge Answers</b>	Yes	Cornerstone is excited to share that the Developer Portal has replaced API Explorer and Edge Answers. The Developer Portal is one-stop shop for API and connector documentations and examples.
<b>Edge Import - Delete Feeds</b>	Yes	With this enhancement, a new <b>DELETE THIS FEED</b> button is available on the Overview tab of the feed settings. Clicking this button deletes the feed.
<b>Edge Import - Display "No Records Found" for Post Process of a Load</b>	Yes	With this enhancement, when a load is not successful due to having no eligible records, a "No records found for post-processing" message is now provided in the <i>Post Processing</i> section of the Load Details page.
<b>Edge Import - Learning Load Enhancement (ILT Sessions Load)</b>	Yes	With this enhancement, the ILT Session load in Edge Import now supports the loading of values in all translatable fields, including text type custom fields.
<b>Edge Import - Learning Load Enhancement (ILT Transcript Load)</b>	Yes	With this enhancement, Transcript Status is optional for ILT Transcript loads. This makes it easier to update certain metadata fields. Transcript Status

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		continues to be required for new ILT Transcript record creation.
<b>Edge Import - Learning Load Enhancement (Training Loads)</b>	Yes	With this enhancement, when using Edge Import to update existing curricula, materials, online course metadata, tests, and videos, if "Learning Object ID" is selected as the unique identifier during import, then only the Learning Object ID is required. All other fields become optional. This allows for easier bulk updates because only the unique identifier and the updated fields need to be populated in the import file.
<b>Edge Import - Learning Load Enhancements (Transcript Loads)</b>	Yes	<p>With this enhancement, the Curriculum Transcript, External Training, ILT Transcript, Material Transcript, Online Course Transcript, OLCO Transcript, Test Transcript, and Video Transcript loads now include the following features:</p> <ul style="list-style-type: none"> <li>○ Show user performing the load as the actor in Transcript History</li> <li>○ Due Date edited time in Transcript History is the time when data was loaded</li> <li>○ Due Date acceptable format and default value</li> </ul>
<b>Edge Import - Performance Load Enhancements (User Goals Load)</b>	Yes	<p>The following enhancements to User Goals loads are included with the November '22 Release:</p> <ul style="list-style-type: none"> <li>○ Goal Status and Progress updates reflect current status and progress instead of default portal values.</li> <li>○ Goals can be imported in Locked status. <b>Note:</b> <i>Edge Import displays a warning if locked goals are present in the load when goal locking is not configured in the portal.</i></li> <li>○ Perspective and Category are ID-based instead of text-based, reducing typos.</li> <li>○ Goal Weight is display per precision value set in the portal instead of being rounded to the nearest whole digit.</li> </ul> <p><b>This functionality is not available at the start of UAT.</b></p>



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Email Management - Default Email Address Settings</b>	Yes	With this enhancement, administrators can use new settings in Corporate Preferences to set and update default From and default Reply-To email addresses for the portal. Once set, these default email addresses can be used in Email Administration as well as in Marketing Communications.
<b>November '22 Language Pack Updates</b>	Yes	New updates to Cornerstone Language Packs and additional languages are available with the November '22 Release. Please visit the <b>November '22 Language Pack Updates</b> posting to review the full list of changes and their targeted availability in stage and production environments.
<b>Reporting 2.0 - Additional Fields</b>	Yes	The following additions and updates have been made to Reporting 2.0 fields with this release: <ul style="list-style-type: none"> <li>○ <b>Reporting Fields - Capabilities</b></li> <li>○ <b>Reporting Fields - Check-Ins</b></li> <li>○ <b>Reporting Fields - Goals</b></li> <li>○ <b>Reporting Fields - Learning</b></li> <li>○ <b>Reporting Fields - Performance Review</b></li> <li>○ <b>Reporting Fields - Recruiting</b></li> </ul>
<b>Reporting 2.0 - Accessibility Enhancement</b>	Yes	With this enhancement, the Reporting 2.0 Builder page content will be resized correctly when zoomed to 400% and viewed at 1280px wide so it can be viewed in one column when magnified.
<b>Reporting 2.0 - Audit PDF Format Changes</b>	Yes	With this enhancement, Audit PDF is updated with the following improvements: <ul style="list-style-type: none"> <li>○ "Generated by" now shows User Full Name and the unique identifier of User ID</li> <li>○ "Date Generated" is displayed as MONTH, DD, YYYY i.e. MAR 25, 2022</li> </ul>
<b>Reporting 2.0 - Calculated Fields Enhancements</b>	Yes	With this release, the following enhancements are made to the Calculated Fields functionality: <ul style="list-style-type: none"> <li>○ Include multiple check-box custom fields in calculated fields</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>○ Ability to select 0 as an option for Decimal Points in numeric Calculated Fields</li> </ul>
<b>Reporting 2.0 - Connect Share User and Email Delivery Setting</b>	Yes	With this enhancement, in Share Report, when choosing the recipients, the user has the option in the selected users tab with a checkbox to include in e-mail delivery.
<b>Reporting 2.0 - Constrain Capabilities "View" Permissions</b>	Yes	<p>With this enhancement, the <i>Reporting - Core - Capabilities Report – View permission</i> (in Report level permissions) and the <i>Reporting - Core - User Capabilities - View permission</i> (in Granular permissions) will be constrained on following user and OU constraints:</p> <ul style="list-style-type: none"> <li>○ Restrict to OU</li> <li>○ Restrict to User's OU</li> <li>○ Restrict to User Self And Subordinates</li> <li>○ Restrict to User</li> <li>○ Restrict to User's Self</li> <li>○ Restrict to User's Manager</li> <li>○ Restrict to User's Subordinates</li> </ul>
<b>Reporting 2.0 - Email Delivery Permission Enhancement</b>	Yes	<p>Following this enhancement the Reporting - Email Delivery permission is only required to setup reports to be delivered through email and no permission is required to receive reports.</p> <p>Additionally, in the Report Builder, the Email Recipients “Add Users” button, which is visible in the “Schedule Delivery Options” flyout when “Deliver to Email” is toggled ON, is only visible to users that have both the “Reporting - Email Delivery permission and the “Reporting - Share permission.”</p>
<b>Reporting 2.0 - Enhancement to Numeric Filter</b>	Yes	With this enhancement, Reporting 2.0 now allows users to paste comma separated values into a numeric filter with the “is one of” operator. The system automatically separates each numeric value into a unique filter value. This aligns with the functionality available in Custom Reports.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Reporting 2.0 - Excel Icon Added to Report Viewer</b>	Yes	<p>With this enhancement the following features are now available:</p> <ul style="list-style-type: none"> <li>○ A Microsoft Excel icon is added to the Viewer page after the clock icon.</li> <li>○ The Microsoft Excel icon is always available irrespective of whether the snapshot is available or not. It follows the behavior like that of the Reporting 2.0 Home Page.</li> <li>○ Using the icon, all users with the view or manage permissions can generate and download a new report snapshot with fresh data (as per the user's saved preferences for the report).</li> <li>○ If a user navigates away from or closes the window while the process is still in progress, the snapshot will still be completed and available in the snapshot pop-up behind the cloud icon. The excel output however will not be delivered as the session has been closed. In that case the user can still download the snapshot to MS Excel through the cloud snapshot pop-up.</li> </ul>
<b>Reporting 2.0 - Identify All Users a Report is Shared With</b>	Yes	<p>Following this enhancement:</p> <ul style="list-style-type: none"> <li>○ Users can identify all shared users of a selected report on the report directly, regardless of the method used to share the report.</li> <li>○ A “Shared via Folder [Folder Name]” note appears in the Share flyout for the reports that are shared via folder.</li> <li>○ For users who received the report through folder sharing, no actions can be taken from this screen.</li> <li>○ This change will not have any impact on how reports are shown and the options available for users who receive the report through Share Report.</li> </ul>
<b>Reporting 2.0 - Merge Summary Rows</b>	Yes	Following this enhancement:

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>○ A new toggle Merge Summary Rows is added to the table properties in report builder</li> <li>○ When the toggle is ON, the output file will merging the matching rows in summarized columns. This is the default setting.</li> <li>○ When the toggle is OFF, summarized columns are populated in each row separately.</li> <li>○ The toggle is only be accessible if at least one column summary has been added.</li> </ul>
<b>Reporting 2.0 - New Summarization Toggle When Using View as Hierarchy</b>	Yes	<p>With this enhancement, a toggle in table properties is introduced that allows customers to change the hierarchy in an Microsoft Excel output file to be shown in different columns.</p> <ul style="list-style-type: none"> <li>○ When ON, hierarchy summary shows all the levels of hierarchy in one column. This is the default setting.</li> <li>○ When OFF, hierarchy summary shows the levels of hierarchy in individual columns.</li> </ul>
<b>Reporting 2.0 - Relative Date Filters</b>	Yes	<p>With this enhancement, a user can now select TODAY, YESTERDAY and TOMORROW for the relative date filters.</p>
<b>Reporting 2.0 - View All Reports and Transfer Ownership</b>	Yes	<p>Following this enhancement:</p> <ul style="list-style-type: none"> <li>○ A new tool Reporting 2.0 View and Manage All Reports is created for administrators.</li> <li>○ By default, the tool shows all reports in the portal owned by all users (Active or Inactive). It can be filtered by User ID.</li> <li>○ Administrators can select one or multiple reports to transfer report ownership to another user, the user whose ownership is transferred (if still active in the system) will be notified on successful transfer of ownership.</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>RTDW Updates to OData v4.0 Delta Objects</b>	Yes	Impacting only customers using Data Exporter API. New objects will be added that support the OData v4.0 Delta/Change Tracking capabilities for Data Exporter API, initially released in August '22. A consolidated <b>list of Data Exporter API objects that currently support OData Delta/Change Tracking</b> is maintained in the RTDW Documentation Community. Join and follow the community to be notified of new objects with Delta support.
<b>RTDW Updates to Reporting API, RDW, and Data Exporter</b>	Yes	Documentation that describes RTDW views and fields used in Custom Reports will be updated for the November '22 Release and available in the <b>RTDW Documentation for Reporting API, RDW, and Data Exporter Community</b> . Join and follow the community to be notified of new posts.
<b>Security Health Check Enhancements</b>	Yes	With the November '22 Release enhancements to Security Health Check, customers can do the following: <ul style="list-style-type: none"> <li>○ Edit security issues to the Cornerstone recommended value</li> <li>○ View and export the Modification History in Microsoft Excel file format</li> </ul>
<b>Security Role Administration Enhancements</b>	Yes	With this enhancement, when creating or updating a security role in Security Role Administration, the security role name is displayed. Upon saving a new or edited role, administrators are directed to the security role table with the role displayed in the search result.
<b>Skill Feedback Assignment Enhancements</b>	Yes	With this enhancement, the following updates are made to the Skill Feedback Assignment functionality: <ul style="list-style-type: none"> <li>○ A user avatar is added to the Skill Details flyout to make it clear whose profile you are viewing.</li> <li>○ Administrators with the appropriate permission can view the My Feedback Requests page for another user via the user's Universal Profile Skills page.</li> </ul>

FEATURE NAME	AUTOMATIC ALLY ENABLED?	DESCRIPTION
<b>Soap API Deprecation in 2023 Q4</b>		All Cornerstone SOAP APIs will be deprecated in Q4 of 2023. This will impact only a subset of API customers. If you are impacted by this upcoming change, you will receive an email from Cornerstone in November 2022 with information detailing the actions you will need to take prior to this deprecation.
<b>Updated Email Notification for All Email Delivery Reports</b>	Yes	With this enhancement, the email notification now includes the following information: <ul style="list-style-type: none"> <li>○ Report generation details (who generated report and when)</li> <li>○ Details about report source</li> <li>○ Report ID</li> <li>○ Instructions on how to use the link mentioned in email</li> </ul>

## Cornerstone HR Features

FEATURE NAME	AUTOMATIC ALLY ENABLED?	DESCRIPTION
<b>"Compensation Type" Added to "User Audit Report - Detailed" Standard Report</b>	Yes	With this release, the Compensation Type field is added to the "User Audit Report - Detailed" standard report as a column in the report output.
<b>Deprecation of the "User Record as of a Date" Standard Report in 2023 Q1</b>	N/A	The "User Record as of a Date" Standard Report will be deprecated in the first quarter of 2023.

## Learning Features

FEATURE NAME	AUTOMATIC ALLY ENABLED?	DESCRIPTION
<b>Curriculum Player 2.0 (Open Beta)</b>	No	Cornerstone is excited to announce an Open Beta in Stage environments for Curriculum Player 2.0. With the Curriculum Player 2.0 experience, learners can view the curriculum contents in a side panel while viewing content through an inline player.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		This updated approach allows learners to keep track of their curriculum progress while simultaneously completing content.
<b>End of Support of the "Library" Training Type with the November '22 Release</b>	N/A	The Library training type is being deprecated with End-of-Support occurring with the November '22 Release.
<b>Enhanced Search on Course Catalog – Filter Parity and Migration</b>	Yes	With this release, administrators can now enable Enhanced Search capabilities when searching the course catalog.
<b>Enhanced Search on Global Search– Filter Parity and Migration</b>	Yes	With this release, administrators can now enable Enhanced Search capabilities or traditional search when using Global Search.
<b>Learning - Accessibility Enhancements</b>	Yes	<p>The following accessibility enhancements are included with the November '22 Release:</p> <ul style="list-style-type: none"> <li>○ Learner Home: Carousels are updated so that the controls do not cover content on the screen and carousel content is more easily viewed when zoomed. <b>This functionality is not available at the start of UAT.</b></li> <li>○ Transcripts: A label for "Type" is added to each object on the transcript so that images are not relied upon, and screen readers can more accurately convey the training type to users.</li> <li>○ Connect Topics: Alt text can be added to attachments and links so they will be more descriptive for screen readers. <b>This functionality is not available at the start of UAT.</b></li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Learn App - Notification Center</b>	Yes	<p>With this release, Cornerstone introduces the Notification Center for the Learn App. By selecting the bell icon on a device's home screen, the Notification List screen opens to display all received and unattended notifications. Selecting any notification in the list opens its details.</p> <p><b>This functionality is not available during UAT.</b></p>
<b>Learning Assignment Tool Guardrail Override Process</b>	Yes	<p>This enhancement provides the ability for organizations to enable a guardrail that can prevent the over-assignment of training when new standard, dynamic, or dynamic recurring learning assignments are created, or existing draft learning assignments are edited. This enhancement also provides the ability for administrators with elevated permissions to review and submit learning assignments on behalf of other administrators and delete saved drafts created by themselves or others.</p>
<b>Learning Search Framework - Now Enhanced Search</b>	Yes	<p>With this release, Cornerstone is now using the name "Enhanced Search" instead of "Learning Search" when referring to our new search framework.</p>
<b>Learning Object Checklist Enhancement</b>	Yes	<p>With this enhancement, a new setting is now available to control whether or not a Completed status will be recorded in a curriculum or certification for an LO (Learning Object)-based Observation Checklist.</p>
<b>New User Interface on the Manage Events and Sessions Pages</b>	Yes	<p>The Manage Events and Sessions pages, "View All Events" and "View All Sessions," were updated in Stage environments during the August '22 Release with a fresh new look to enhance the daily experience for administrators and instructors who often need to visit these pages to maintain classroom and virtual training events and sessions for their organization.</p> <p>With the November '22 Release, this new user interface is now available for Production and Pilot environments.</p>
<b>Reporting Fields - Learning</b>	Yes	<p>With the November '22 Release, new fields have been introduced to the Certifications area of Reporting 2.0:</p>



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>○ Certifications &gt; Certification Removal History fields have been added</li> <li>○ Certification Removal History &gt; Assigned by fields have been added</li> <li>○ Certification Removal History &gt; Removed by fields have been added</li> <li>○ Certification Removal History &gt; User have been added</li> <li>○ Transcript</li> </ul>
<b>UI Modifications and Enhancements - November 2022</b>	Yes	<p>With this release, user interfaces are upgraded for:</p> <ul style="list-style-type: none"> <li>○ Course Catalog</li> <li>○ Curricula - Edit and Create</li> <li>○ Deep Links Administration</li> <li>○ ILT Create and Edit New Sessions and Events</li> <li>○ Materials Administration</li> <li>○ Training Request Approval</li> </ul> <p>With these interface changes, no functionality changes are included. No functionality is added or removed.</p>
<b>Versioning Dashboards for Curricula, Online Classes, and Materials</b>	Yes	<p>With this release, versioning dashboards for Material and Online Classes are accessible from the Course Catalog and Course Console. These dashboards are similar to the curriculum versioning dashboard which has also been enhanced with this release.</p>

## Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Check-Ins Usability Enhancements</b>	Yes	<p>With this release, Check-Ins improves usability and consistency across many different screens.</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Consolidated Management of Goals</b>	Yes	<p>With this enhancement, before task completion:</p> <ul style="list-style-type: none"> <li>○ Goals created in the Goal Planning section are visible in read only status on the My Goals page, Snapshot Goals, and in Reporting 2.0.</li> <li>○ A new "In Review" status is added to identify goals currently being worked on in a goal planning section.</li> <li>○ The View History tab now shows the modification history for goals created in a goal planning task.</li> </ul>
<b>Deprecation of Compensation Loads for Data Load Wizard (DLW) with the November 2022 Release</b>	N/A	The ability to perform Compensation loads and feeds using Data Load Wizard (DLW) will be deprecated with the November '22 Release. DLW Compensation loads and feeds include Employee Salary, Salary Structure, and Individual Targets. The modern self-service Edge Import framework for all Compensation loads and feeds is available.
<b>Learning Object Checklist Enhancement</b>	Yes	With this enhancement, a new setting is now available to control whether or not a Completed status will be recorded in a curriculum or certification for an LO (Learning Object)-based Observation Checklist.
<b>Reporting Fields - Check-Ins</b>	Yes	<p>With the November '22 Release, the following updates have been made to Reporting 2.0:</p> <ul style="list-style-type: none"> <li>○ New Check-Ins fields have been added</li> <li>○ New Check-Ins &gt; Check-In Follow-Up Assignee fields have been added</li> <li>○ New Check-Ins &gt; Check-In Note Owner fields have been added</li> </ul>
<b>Reporting Fields - Goals</b>	Yes	Following this enhancement, Goal reports in Reporting 2.0 will have configuration options that allow for creating exception reports (i.e. users who do not have Goals set up). This is achieved using the existing exception reporting options within Reporting 2.0.
<b>Reporting Fields - Performance Reviews</b>	Yes	With this enhancement, Task ID is added to the Performance Review section of Reporting 2.0.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Skills in Check-Ins</b>	Yes	With this release, within Check-Ins, users can select the skills icon to access their Skills Profile, add and remove skills, and search for new skills.
<b>Update Custom Emails In Review Tasks</b>	Yes	With this enhancement, after a review task is launched, administrators can edit all fields in custom a custom email template.
<b>View Only Access for Goals</b>	Yes	With this enhancement, on the Universal Profile Snapshot page, view and edit rights to others' public goals is controlled independently. Public goals are goals that have the "Allow other users to see and align" option selected.

## Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Candidate API – Support Jobs Posted Only in Internal Career Site</b>	Yes	With this release, candidates can apply for positions through CAPI that are only on internal career sites (ICS).
<b>Email on Manage Candidates – Support Rich Text Editor</b>	Yes	With this release, a Rich Text Editor tool is provided when composing email to candidates. The rich-text editor provides additional formatting and alignment options, such as font size, bold and italicized text, bullets and numbering, and where text is aligned on the page.
<b>Job Alerts on Mobile-Friendly Career Sites</b>	Yes	<ul style="list-style-type: none"> <li>With this release, administrators can enable job alerts to allow candidates to create job alerts on a mobile-friendly site job search page. Administrators must enable Job Alerts for each mobile-friendly career site that requires it.</li> <li>Candidates can now go to their Career Site Home page to create job alerts that send an email when relevant jobs are posted to mobile-friendly career sites.</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Manage Candidates – Configure and Send Email Templates</b>	Yes	With this release, administrators can now create and activate email templates that recruiters can select and send from the Managed Candidates page.
<b>New Tags for Onboarding Email Templates</b>	Yes	<p>With this release, the following new email tags are added to the Onboarding Form Assigned and Completed Email templates:</p> <ul style="list-style-type: none"> <li>○ ONBOARDING.USER.FIRST.NAME</li> <li>○ ONBOARDING.USER.LAST.NAME</li> <li>○ ONBOARDING.USER.PHONE</li> <li>○ ONBOARDING.USER.EMAIL</li> <li>○ ONBOARDING.USER.USERNAME</li> <li>○ ONBOARDING.USER.HIRE.DATE</li> <li>○ ONBOARDING.USER.FUTURE.POSITION</li> <li>○ ONBOARDING.USER.FUTURE.DIVISION</li> <li>○ ONBOARDING.USER.FUTURE.LOCATION</li> </ul>
<b>Reporting Fields - Recruiting</b>	Yes	<p>With the November '22 Release, the following updates have been made to Reporting 2.0:</p> <ul style="list-style-type: none"> <li>○ Requisition Template &gt; Details fields have been added</li> <li>○ Ability to report on custom fields of the Requisition Template has been added</li> </ul>
<b>Referoo Integration</b>	No, available in Edge Marketplace	Referoo has integrated with Cornerstone to allow Cornerstone users to select candidates and request they complete the Referoo reference check process. Clients can create unlimited packages within the Referoo Application and access them within Cornerstone. Status updates are displayed in Cornerstone and final results and report URL returned to Cornerstone.
<b>Reset Password Workflow Enhancement – Eligible for Rehire</b>	Yes	With this release, instead of answering security questions, inactive and eligible for rehire candidates who want to log in to the system, receive an email with a link to reset their password.

# New and Enhanced Permissions for November '22 Release

The following permissions have been added or updated with this release:

## New Permissions

The following permissions are new for the November '22 release:

### Core/General

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Capability Models Library - Edit	Grants ability to access the Capability Models Library and create, edit, and copy Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Capability Models Library - Manage	Grants ability to access the Capability Models Library and create, edit, copy, and deactivate Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Delete Feeds	Grants ability to delete disabled Edge Import feeds. Users with this permission can delete disabled feeds created by anyone for all types of data feeds. This permission cannot be constrained. This is an administrator permission.	Edge Import
Reporting - Admin - All Reports	Grants ability to access the Reporting 2.0 View and Manage All Reports tool. This tool enables administrators to view all reports that have been created in Reporting 2.0. Administrators can also transfer ownership of these reports. This permission can be constrained by OU and User. The constraints on this permission refer to the Report Owner.	Reporting
Security Health Check - Edit Security Issues	Grants ability to edit security issue settings in the Security Health Check tool and set them to Cornerstone's recommended value. This permission cannot be constrained. This is an administrator permission.	Core Administration

### Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Delete Draft	<p>Grants ability to delete any draft learning assignment. This includes drafts that were submitted for override, drafts created by self, or any other unneeded drafts created by other administrators. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only delete drafts that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration
Assignment Tool - Submit Draft	<p>Grants ability to create and submit a learning assignment that exceeds the High User Count threshold even if the Restrict Submission toggle is enabled in Assignment Tool Preferences. Administrators with this permission can also resume and submit a draft learning assignment that was created by another administrator that exceeded the High User Count threshold. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only submit learning assignments that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration
Assignment Tool - View all Drafts	<p>Grants ability to view any learning assignment draft. This includes both drafts that need an override and drafts created by other administrators. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only view drafts that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration

#### Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Recruiting Configure Email Templates- Manage	Grants ability to configure email communication templates. This permission cannot be constrained. This is an administrator permission.	Recruiting
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#### Universal Profile

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot Goals - Manage	<p>Enables user to manage their own goals, and others public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile
Snapshot Goals - View	<p>Enables user to view their own goals, and others' public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile

## Enhanced Permissions

The following existing permissions are enhanced for the November '22 release:

#### Core/General

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Ratings - View Ratings and	Grants ability to view ratings history and rating details about other people regardless of the visibility settings on the ratings. Grants ability to view the My Feedback	Core Administration

Feedback about  
Other User

Requests page. Administrators with this permission can view all ratings and feedback about all other users, regardless of the visibility settings of the ratings. This permission cannot be constrained.

This permission does not bypass visibility ratings about yourself, which means users cannot use this permission to view ratings provided about themselves that are otherwise not visible to them.

This permission is intended for an administrator or talent partner who needs broad access to all ratings occurring within the portal.



# List of New Report Fields for November '22 Release

This page provides the master list of new report fields for the November '22 release.

## Core/General

FIELD NAME	SECTION
Linked Skill ID	Capabilities
Linked Skill Type	Capabilities

## Learning

FIELD NAME	SECTION
Certification ID*	Certification Removal History
Certification Title*	Certification Removal History
Certification User Status*	Certification Removal History
Certification Status*	Certification Removal History
Certification Period*	Certification Removal History
Certification Period Expiration Date*	Certification Removal History
Certification Period Due Date*	Certification Removal History
Certification Version*	Certification Removal History
Assignment Date*	Certification Removal History
Assignment Method*	Certification Removal History
User Status*	Certification Removal History
Removal method*	Certification Removal History
Removal comments*	Certification Removal History
Removal date*	Certification Removal History
User ID*	Certification Removal History > Assigned by
User Full Name*	Certification Removal History > Assigned by
User First Name*	Certification Removal History > Assigned by
User Last Name*	Certification Removal History > Assigned by
User ID*	Certification Removal History > Removed by
User Full Name*	Certification Removal History > Removed by
User First Name*	Certification Removal History > Removed by
User Last Name*	Certification Removal History > Removed by
User ID*	Certification Removal History > User

FIELD NAME	SECTION
User Full Name*	Certification Removal History > User
User First Name*	Certification Removal History > User
User Last Name*	Certification Removal History > User
Transcript Start Date	Transcript

\*As of the November 4, 2022 release, these fields are available in Reporting 2.0 in the Certification Removal History Report Type. Capturing of certification removal history was introduced on August 5, 2022, so some data will not be populated prior to August 5 2022, and you will see these fields with empty values.

### Performance

FIELD NAME	SECTION
Check-In Note Type	Check-Ins
Check-In Note Content	Check-Ins
Check-In Follow-Up Sequence Number	Check-Ins
Check-In Follow-Up Content	Check-Ins
Check-In Follow-Up Completed	Check-Ins
Check-In Follow-Up Due Date	Check-Ins
User Full Name	Check-Ins > Check-In Follow-Up Assignee
User ID	Check-Ins > Check-In Follow-Up Assignee
User Full Name	Check-Ins > Check-In Note Owner
User ID	Check-Ins > Check-In Note Owner
Task ID	Performance Review

### Recruiting

FIELD NAME	SECTION
Requisition Template Reference Id	Requisition Template > Details
Requisition Template ID	Requisition Template > Details
Template Title	Requisition Template > Details
Template Description	Requisition Template > Details
Active	Requisition Template > Details

FIELD NAME	SECTION
Position OU ID	Requisition Template > Details
Position OU Name	Requisition Template > Details
Division OU ID	Requisition Template > Details
Requisition Template Date Created	Requisition Template > Details
Location OU Name	Requisition Template > Details
Location OU ID	Requisition Template > Details
Grade OU ID	Requisition Template > Details
Grade OU Name	Requisition Template > Details
Cost Center OU ID	Requisition Template > Details
Cost Center OU Name	Requisition Template > Details
External Applicant Workflow Template ID	Requisition Template > Details
External Applicant Workflow Template Title	Requisition Template > Details
EEO Category	Requisition Template > Details
Internal Applicant Workflow Template ID	Requisition Template > Details
Internal Applicant Workflow Template Title	Requisition Template > Details
Agency Workflow Template ID	Requisition Template > Details
Agency Workflow Template Title	Requisition Template > Details
Employment Type	Requisition Template > Details

FIELD NAME	SECTION
Employment Status	Requisition Template > Details
Currency	Requisition Template > Details
Compensation Type	Requisition Template > Details
[Custom Fields]	Requisition Template

# Release Notes Updates for November '22 Release

The following changes have been made to the release notes since they were initially published:

Changes made on 3 January 2023:

## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learning Object Checklist Enhancement	Learning Object Checklist Enhancement	Added a Considerations section with additional information.

Changes made on 4 November 2022:

## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
View Only Access for Goals	View Only Access for Goals	Added the following: <b>Note:</b> <i>If a user or manager unchecks the "Allow other users to see and align" option, the user will see the goals in snapshot goals but the manager will not.</i>

Changes made on 4 November 2022:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting 2.0 - Relative Date Filters	Reporting 2.0 - Relative Date Filters	Added information regarding the "Limit Date Select To" option in the Restrict Options section.
Reporting 2.0 - View All Reports and Transfer Ownership	Reporting 2.0 - View All Reports and Transfer Ownership Reporting 2.0 - View and Manage All Reports Overview Reporting 2.0 - Transfer Report Ownership	Added the new "Reporting - Admin - All Reports" permission.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Security Health Check Enhancements	Security Health Check Enhancements	Partners maintain View Only access but they can be granted the ability to view and export the Modification History.
Soap API Deprecation in 2023 Q4	Soap API Deprecation in 2023 Q4	This does not include Transcript APIs.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
New User Interface on the Manage Events and Sessions Pages	New User Interface on the Manage Events and Sessions Pages	Updated the Benefit section.  This functionality is currently in an Early Adopter mode.
UI Modifications and Enhancements - November 2022	UI Modifications and Enhancements - November 2022	Updated the Benefit section.  This functionality is currently in an Early Adopter mode.
Versioning Dashboards for Curricula, Online Classes, and Materials	Material and Online Class Versioning Dashboards	Updated the <i>Impacted Users - Scenarios</i> section.

## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Consolidated Management of Goals	Consolidated Management of Goals	This enhancement impacts current and future performance review tasks.
Reporting Fields - Check-Ins	Reporting Fields - Check-Ins	The Check-In Follow-Up Is Completed field name is updated to Check-In Follow-Up Completed.  A Check-In Follow-Up Assignee section and a Check-In Note Owner section are added.  The section names and groupings are updated.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
View Only Access for Goals	View Only Access for Goals	Added the "Snapshot Goals - View" new permission.

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Candidates – Configure and Send Email Templates Enhancements - November 2022	Manage Candidates – Configure and Send Email Templates	Changed new permission name from "Recruiting Email Templates- Manage" to "Recruiting Configure Email Templates- Manage".

Changes made on 25 October 2022:

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Curriculum Player 2.0 (Open Beta)	Curriculum Player 2.0 (Open Beta)	This functionality is available in Stage environments as of October 13.
Learning - Accessibility Enhancements	Learning - Accessibility Enhancements	The Connect Topics functionality is targeted for 2023 Q1.

## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Check-Ins	Reporting Fields - Check-Ins	<p>The Check-In Follow-Up Is Completed field name is updated to Check-In Follow-Up Completed.</p> <p>A Check-In Follow-Up Assignee section and a Check-In Note Owner section are added.</p> <p>The section names and groupings are updated.</p>

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Candidates – Configure and Send Email Templates Enhancements - November 2022	Manage Candidates – Configure and Send Email Templates	Changed new permission name from "Recruiting Email Templates- Manage" to "Recruiting Configure Email Templates- Manage".

Changes made on 21 October 2022:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Developer Portal Replaces API Explorer and Edge Answers	Developer Portal Replaces API Explorer and Edge Answers	Removed "API Explorer" from items not available after November release as it is still available at this time.
Security Role Administration Enhancements	Security Role Administration Enhancements	Added the following Consideration: Role name is not visible in portals where breadcrumbs are disabled via the "Hide Breadcrumbs" setting in Display Preferences.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
UI Modifications and Enhancements - November 2022	UI Modifications and Enhancements - November 2022	In FAQ section, replaced Suggestion City link with Validation Station link.

Changes made on 20 October 2022:

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Job Alerts on Mobile-Friendly Career Sites	Job Alerts on Mobile-Friendly Career Sites	Added the following: <b>Note:</b> <i>At this time, customers on SL4 environment cannot receive emails sent from Job Alerts on Mobile-Friendly Career Site.</i>



## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learn App - Notification Center	Learn App - Notification Center	

Changes made on 19 October 2022:

## Core/General

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Learning Load Enhancements (Transcript Loads)	Edge Import - Learning Load Enhancements (Transcript Loads)	Updated all due dates to 01-01-2023.
Email Management - Default Email Address Settings	Email Management - Default Email Address Settings	Added the following note to the information about Default From Address: <b>Note:</b> <i>It may take a few minutes for this value to update.</i>
Reporting 2.0 - Reporting Fields - Capabilities	Reporting Fields - Capabilities	The field type column for Linked Skill ID and Linked Skill Type has been updated.
Reporting 2.0 - Reporting Fields - Learning	Reporting Fields - Learning	The field type column for the User ID field in Certification Removal History > Removed by has been updated
Reporting 2.0 - Reporting Fields - Learning	Reporting Fields - Learning	The description for all fields listed in Certification Removal History > Assigned by have been updated.
Reporting 2.0 - Reporting Fields - Recruiting	Reporting Fields - Recruiting	Division OU Name field has been added.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learn App - Notification Center	Learn App - Notification Center	The following corporate settings must be enabled to use the Notification Center: <ul style="list-style-type: none"><li>○ AllowMobileRemoteNotifications</li></ul>

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		<ul style="list-style-type: none"> <li>○ LMSNotificationCenter</li> </ul>

Changes made on 14 October 2022:

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learn App - Notification Center	Learn App - Notification Center	<p>The following corporate settings must be enabled to use the Notification Center:</p> <ul style="list-style-type: none"> <li>○ AllowMobileRemoteNotifications</li> <li>○ LMSNotificationCenter</li> </ul>

Changes made on 13 October 2022:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Performance Load Enhancements (User Goals Load)	Edge Import - Performance Load Enhancements (User Goals Load)	This functionality is not available at the start of UAT.

## **18 November Patch Release Functionality**

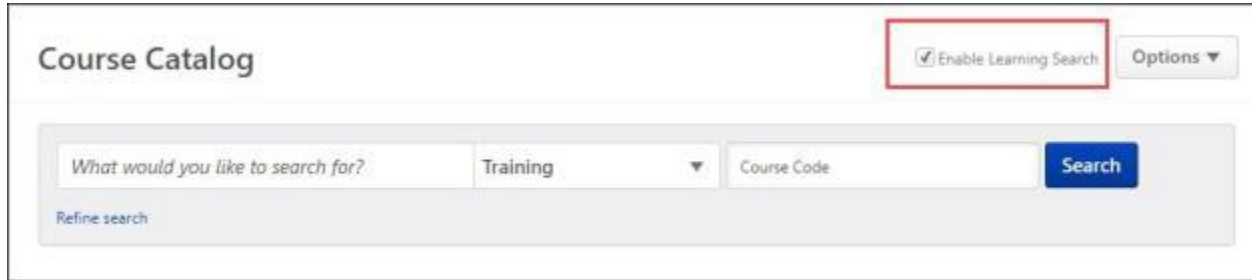
## What's New for the 18 November 2022 Patch Release

The following is released along with the 18 November 2022 patch release:

MODULE	FEATURE	DESCRIPTION
Performance Goals	View Only Access for Goals	Updated topic to match functionality.
Learning	Enhanced Search on Global Search–Filter Parity and Migration	Available in LAX swim lanes. It may take up to 14 days for the update in functionality to be present in your portal.
Learning	Enhanced Search on Course Catalog – Filter Parity and Migration	Available in the following swim lanes: FRA SL1, CDG SL1, CDG SL4, AU SL1 (AWS), JP SL1 (AWS), UK-SL1 (AWS), UK-SL2 (AWS), FRA SL1 (AWS), CDG SL1 (AWS), CDG SL4 (AWS) It may take up to 14 days for the update in functionality to be present in your portal.

## Enhanced Search on Course Catalog – Filter Parity and Migration

With this enhancement, administrators can now enable Enhanced Search capabilities when searching the course catalog.

The screenshot shows the 'Course Catalog' header. In the top right corner, there is a checkbox labeled 'Enable Learning Search' which is checked, and an 'Options' dropdown menu. Below this is a search bar with the placeholder text 'What would you like to search for?'. To the right of the search bar is a dropdown menu currently set to 'Training', and further right is a text input field labeled 'Course Code'. A blue 'Search' button is located to the right of the 'Course Code' field. Below the search bar, there is a link that says 'Refine search'.

When the "Enable Learning Search" option is enabled, the following enhanced search filters are now available:

- Availability
- Active/Inactive
- Competency
- Course Rating
- Course Code
- Created By Me
- Credits
- Date Added to Catalog
- Downloadable Courses
- Instructor
- Location
- LO Status
- Session Date
- Show Courses with Recurrence
- Skills
- Subscription

To return to traditional search functionality, uncheck the "Enable Learning Search" box.

When Enhanced Search is enabled, a maximum of 10,000 results will be available for any single search performed. If more results are required, use traditional search.

### Rollout Schedule by Swim Lane

All stage swim lanes	October 18 (UAT 2) – It may take up to 7 days for the update in functionality to be present in your portal.
<ul style="list-style-type: none"><li>○ FRA SL1</li><li>○ CDG SL1</li></ul>	November 18 patch – It may take up to 14 days for the update in functionality to be present in your portal.

<ul style="list-style-type: none"> <li>○ CDG SL4</li> <li>○ AU SL1 (AWS)</li> <li>○ JP SL1 (AWS)</li> <li>○ UK-SL1 (AWS)</li> <li>○ UK-SL2 (AWS)</li> <li>○ FRA SL1 (AWS)</li> <li>○ CDG SL1 (AWS)</li> <li>○ CDG SL4 (AWS)</li> </ul>	
All LAX swim lanes	December 2 patch – It may take up to 14 days for the update in functionality to be present in your portal.
All LHR swim lanes	December 16 patch – It may take up to 14 days for the update in functionality to be present in your portal.

For more information, see [Where can we find our swimlane status?](#)

## Considerations

Administrators may also deactivate enhanced search for the Course Catalog in Search Preferences.

## Implementation

This functionality is automatically enabled for all organizations using the Course Catalog.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the	Learning - Administration

	<p>Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration

## Enhanced Search on Global Search– Filter Parity and Migration

With this enhancement, administrators can now enable Enhanced Search capabilities or traditional search when using Global Search.

The following filters are available when searching for training in Global Search when Enhanced Search is enabled:

- Location
- Competency
- Skills
- Instructor
- Credits
- Session Date

The following custom field data type filters are available to use when searching for training in Global Search when Enhanced Search is enabled:

- Check Box
- Hierarchy
- Radio Button
- Date
- Multi-Selection Check Box
- Dropdown
- Numeric

Title, Keyword, and Description filters are combined into one text filter. Filters use an 'AND' operation, including custom fields, which currently uses an 'OR' operation with traditional search.

### Rollout Schedule by Swim Lane

All stage swim lanes	October 12 (UAT 1) – It may take up to 7 days for the update in functionality to be present in your portal
<ul style="list-style-type: none"><li>○ FRA SL1</li><li>○ CDG SL1</li><li>○ CDG SL4</li><li>○ AU SL1 (AWS)</li><li>○ JP SL1 (AWS)</li><li>○ UK-SL1 (AWS)</li><li>○ UK-SL2 (AWS)</li><li>○ FRA SL1 (AWS)</li></ul>	November 4 patch – It may take up to 14 days for the update in functionality to be present in your portal



<ul style="list-style-type: none"> <li>○ CDG SL1 (AWS)</li> <li>○ CDG SL4 (AWS)</li> </ul>	
All LAX swim lanes	November 18 patch – It may take up to 14 days for the update in functionality to be present in your portal.
All LHR swim lanes	December 2 patch – It may take up to 14 days for the update in functionality to be present in your portal.

For more information, see [Where can we find our swimlane status?](#)

## Considerations

- The default setting will be set to Enhanced Search. Administrators can change this preference by going to [PREFERENCES > SEARCH PREFERENCES > TRAINING](#). Scroll to Search Engine and update the setting.
- Enhanced search and traditional search use different frameworks to produce search results. Search results may vary based on the type of search.

## Implementation

This functionality is automatically enabled for all organizations using the Global Search.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Admin Search Preferences - Manage	Grants ability to configure preferences for Global Search and Course Catalog within Search Preferences. The constraints of this permission are inherited from the Global Search Preferences - Manage permission. This is an administrator permission.	Learning - Administration

## View Only Access for Goals

Prior to this enhancement, users with access to another person's public goals had view and edit rights.

With this enhancement, on the Universal Profile Snapshot page, view and edit rights to others' public goals is controlled independently using permissions.

### Implementation

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

### Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot Goals - Manage	<p>Enables user to manage their own goals, and others public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile
Snapshot Goals - View	<p>Enables user to view their own goals, and others' public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile

**Note:** "Snapshot Goals - Manage" was previously named "Snapshot - Goals."

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Company Goals - Create	Grants access to create goals that appear to all users as "company goals." This permission cannot be constrained. This is an administrator permission.	Performance - Administration
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

## **02 December Patch Release Functionality**

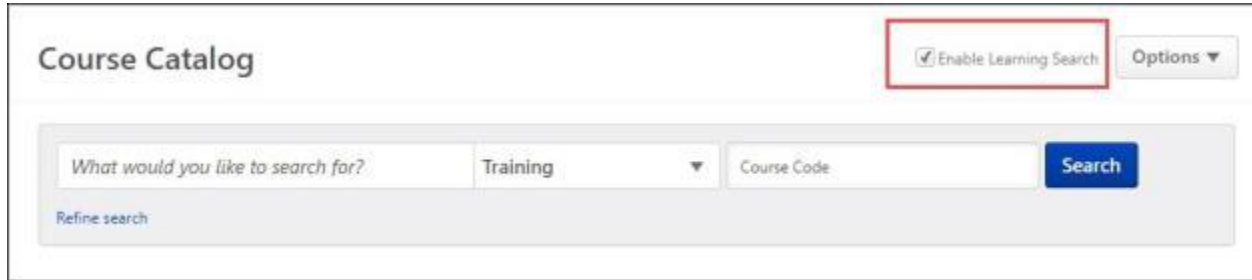
## What's New for the 02 December 2022 Patch Release

The following is released along with the 02 December 2022 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	Enhanced Search on Global Search– Filter Parity and Migration	Available in LHR swim lanes. It may take up to 14 days for the update in functionality to be present in your portal.
Learning	Enhanced Search on Course Catalog – Filter Parity and Migration	Available LAX swim lanes. It may take up to 14 days for the update in functionality to be present in your portal.

## Enhanced Search on Course Catalog – Filter Parity and Migration

With this enhancement, administrators can now enable Enhanced Search capabilities when searching the course catalog.

The screenshot shows the 'Course Catalog' header. In the top right corner, there is a checkbox labeled 'Enable Learning Search' which is checked, and an 'Options' dropdown menu. Below this is a search bar with the placeholder text 'What would you like to search for?'. To the right of the search bar is a dropdown menu currently set to 'Training'. Further right is a text input field labeled 'Course Code' and a blue 'Search' button. A 'Refine search' link is located below the search bar.

When the "Enable Learning Search" option is enabled, the following enhanced search filters are now available:

- Availability
- Active/Inactive
- Competency
- Course Rating
- Course Code
- Created By Me
- Credits
- Date Added to Catalog
- Downloadable Courses
- Instructor
- Location
- LO Status
- Session Date
- Show Courses with Recurrence
- Skills
- Subscription

To return to traditional search functionality, uncheck the "Enable Learning Search" box.

When Enhanced Search is enabled, a maximum of 10,000 results will be available for any single search performed. If more results are required, use traditional search.

### Rollout Schedule by Swim Lane

All stage swim lanes	October 18 (UAT 2) – It may take up to 7 days for the update in functionality to be present in your portal.
<ul style="list-style-type: none"><li>○ FRA SL1</li><li>○ CDG SL1</li></ul>	November 18 patch – It may take up to 14 days for the update in functionality to be present in your portal.

<ul style="list-style-type: none"> <li>○ CDG SL4</li> <li>○ AU SL1 (AWS)</li> <li>○ JP SL1 (AWS)</li> <li>○ UK-SL1 (AWS)</li> <li>○ UK-SL2 (AWS)</li> <li>○ FRA SL1 (AWS)</li> <li>○ CDG SL1 (AWS)</li> <li>○ CDG SL4 (AWS)</li> </ul>	
All LAX swim lanes	December 2 patch – It may take up to 14 days for the update in functionality to be present in your portal.
All LHR swim lanes	December 16 patch – It may take up to 14 days for the update in functionality to be present in your portal.

For more information, see [Where can we find our swimlane status?](#)

## Considerations

Administrators may also deactivate enhanced search for the Course Catalog in Search Preferences.

## Implementation

This functionality is automatically enabled for all organizations using the Course Catalog.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the	Learning - Administration

	<p>Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration



## Enhanced Search on Global Search– Filter Parity and Migration

With this enhancement, administrators can now enable Enhanced Search capabilities or traditional search when using Global Search.

The following filters are available when searching for training in Global Search when Enhanced Search is enabled:

- Location
- Competency
- Skills
- Instructor
- Credits
- Session Date

The following custom field data type filters are available to use when searching for training in Global Search when Enhanced Search is enabled:

- Check Box
- Hierarchy
- Radio Button
- Date
- Multi-Selection Check Box
- Dropdown
- Numeric

Title, Keyword, and Description filters are combined into one text filter. Filters use an 'AND' operation, including custom fields, which currently uses an 'OR' operation with traditional search.

### Rollout Schedule by Swim Lane

All stage swim lanes	October 12 (UAT 1) – It may take up to 7 days for the update in functionality to be present in your portal
<ul style="list-style-type: none"><li>○ FRA SL1</li><li>○ CDG SL1</li><li>○ CDG SL4</li><li>○ AU SL1 (AWS)</li><li>○ JP SL1 (AWS)</li><li>○ UK-SL1 (AWS)</li><li>○ UK-SL2 (AWS)</li><li>○ FRA SL1 (AWS)</li></ul>	November 4 patch – It may take up to 14 days for the update in functionality to be present in your portal

<ul style="list-style-type: none"> <li>○ CDG SL1 (AWS)</li> <li>○ CDG SL4 (AWS)</li> </ul>	
All LAX swim lanes	November 18 patch – It may take up to 14 days for the update in functionality to be present in your portal.
All LHR swim lanes	December 2 patch – It may take up to 14 days for the update in functionality to be present in your portal.

For more information, see [Where can we find our swimlane status?](#)

## Considerations

- The default setting will be set to Enhanced Search. Administrators can change this preference by going to [PREFERENCES > SEARCH PREFERENCES > TRAINING](#). Scroll to Search Engine and update the setting.
- Enhanced search and traditional search use different frameworks to produce search results. Search results may vary based on the type of search.

## Implementation

This functionality is automatically enabled for all organizations using the Global Search.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Admin Search Preferences - Manage	Grants ability to configure preferences for Global Search and Course Catalog within Search Preferences. The constraints of this permission are inherited from the Global Search Preferences - Manage permission. This is an administrator permission.	Learning - Administration

# Content Anytime

## **Content Anytime - Q4 Updates**

Refreshes to Content Anytime and À La Carte subscriptions occur every month! New titles are added to libraries monthly and removals occur quarterly. Content Anytime subscribers automatically receive their subscription refreshes.

Target dates for Q4 refreshes are listed below. Please refer to the 2022 Content Refresh Calendar for the timing of refreshes for all of 2022.

- October 7 – October 14: Additions Only
- November 11 – November 18 : Additions Only
- December 9 – December 16 : Removals & Additions

Visit and follow the Content Refresh Topic in the Success Center to stay up to date with the latest subscription refresh information for both Content Anytime subscriptions and À La Carte libraries.

## Core/General

# Capabilities Enhancements

## Capability Models

## Capability Models - Overview

With the November '22 Release, administrators can create Capability Models to set skill requirements for specific groups in the organization. With Capability Models, administrators define key skills for an audience by selecting one or more organizational units to align to the model and selecting critical skills those users should either have or be developing. Critical skills are suggested based on the Capability Model details or can be searched for by keyword.

Capability Models are managed in the new Capability Model library where administrators can create, edit, or deactivate models.

Suggested skills on the Skills Profile are now updated to prioritize critical skills from aligned models, if undeclared, even if undetected in their profile.

## How Does this Enhancement Benefit My Organization?

This enhancement enables organizations to accurately define critical skills for specific audiences within the organization, such as those that share a common position, division, or location.

## Implementation

This functionality is automatically enabled for all organizations.

Access to the Capability Models Library is controlled by the new *Capabilities - Capability Models Library - Edit* and *Capabilities - Capability Models Library - Manage* permissions.

## Glossary

- Capability Model - A Capability Model is a defined group of critical capabilities that a particular audience or group should either have or be developing. Capability Models can influence a user's suggested skills if the selected organizational unit audience aligns with the user's profile.

## Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Capability Models Library - Edit	Grants ability to access the Capability Models Library and create, edit, and copy Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Capability Models Library - Manage	Grants ability to access the Capability Models Library and create, edit, copy, and deactivate Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration

The following existing permissions apply to this functionality:



PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

### Security Roles

Upon release, the new *Capabilities - Capability Models Library - Edit* and *Capabilities - Capability Models Library - Manage* permissions are automatically granted to the default System Administrator role. Administrators must grant these permissions to other roles, if necessary.

## Capability Models Library

A Capability Model is a defined group of critical capabilities that a particular audience or group should either have or be developing. Capability Models can influence a user's suggested skills if the selected organizational unit audience aligns with the user's profile.

The Capability Models Library enables administrators to create, edit, copy, and deactivate Capability Models.

To access the Capability Models Library, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > CAPABILITY MODELS LIBRARY](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Capability Models Library - Edit	Grants ability to access the Capability Models Library and create, edit, and copy Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Capability Models Library - Manage	Grants ability to access the Capability Models Library and create, edit, copy, and deactivate Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration

Manage Capability Models

Filters

Last Modified - Newest

 Search models...

Create

Status	ID	Name	Source	Created	Modified		
Active	MOD-102	Marketing Manager	Cornerstone Application	9/20/2022 by Jon Lolley	9/20/2022 by Jon Lolley	<a href="#">Edit</a>	...
Active	MOD-101	Customer Service Representative	Cornerstone Application	9/20/2022 by Jon Lolley	9/20/2022 by Jon Lolley	<a href="#">Edit</a>	...
Active	MOD-100	Software Engineer	Cornerstone Application	9/20/2022 by Jon Lolley	9/20/2022 by Jon Lolley	<a href="#">Edit</a>	...

1-3 of 3

## Search, Filter, and Sort Capability Models

To search for a Capability Model by name, enter the keyword in the **Search models** field. Then, select the Magnifying Glass icon or press the Enter key on your keyboard.

To filter the Capability Models, select the **Filters** link. The models can be filtered by status (e.g., Draft, Active, Inactive) and source (e.g., Cornerstone Application, Cornerstone Skills Graph, Edge Import).

To change the sort order of the Capability Models, select the appropriate sort order from the drop-down menu. By default, models are sorted by modification date with the most recently modified model displayed first.

### Create a Capability Model

To create a Capability Model, select the **CREATE** button. [See Capability Model - Create/Edit](#) on page 57 *for additional information*.

### Edit a Capability Model

To edit a Capability Model, select the **Edit** link for the appropriate Capability Model. [See Capability Model - Create/Edit](#) on page 57 *for additional information*.

### Deactivate a Capability Model

To deactivate a Capability Model, select menu icon for the appropriate Capability Model. Then, select **Deactivate**. When a model is inactive, the model will no longer impact the Skills Profile for users within the model's defined audience. Any skills that were suggested to users because of the model will be removed from the *Skills You Might Have* section of their Skills Profile.

### Publish a Capability Model

To publish an inactive Capability Model, select menu icon for the appropriate Capability Model. Then, select **Publish**. When a Capability Model is published, any user who is within the model's defined audience is provided the model's critical skills as suggested skills in the *Skills You Might Have* section of their Skills Profile. Users are not suggested any critical skills that they have already declared.

### Capability Model List

The following information is displayed for each existing Capability Model:

- Status - This displays the status of the model, such as Draft, Active, and Inactive.
- ID - This displays the unique identifier for the model. This is automatically assigned when the model is created within the Cornerstone CSX application.
- Name - This displays the name of the model.
- Source - This displays how the model was added to the library.
- Created - This displays the date on which the model was created and the name of the user who created the model.
- Modified - This displays the date on which the model was most recently modified and the name of the user who modified the model.

## Capability Model - Create/Edit

A Capability Model is a defined group of critical capabilities that a particular audience or group should either have or be developing. Capability Models can influence a user's suggested skills if the selected organizational unit audience aligns with the user's profile.

To create a Capability Model, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > CAPABILITY MODELS LIBRARY](#). Then, select the **CREATE** button.

To edit a Capability Model, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > CAPABILITY MODELS LIBRARY](#). Then, select the **Edit** link for the appropriate Capability Model.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Capability Models Library - Edit	Grants ability to access the Capability Models Library and create, edit, and copy Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Capability Models Library - Manage	Grants ability to access the Capability Models Library and create, edit, copy, and deactivate Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration

Create Capability Model


Back To Library

General Settings

## General Settings


Capability models define a grouping of critical capabilities for an audience. Models can influence a user's suggested skills if the selected OU aligns with their profile.

**\* Name**



0 / 250

**Description**



0 / 2000

**Select Your Audience**

Users aligned with any of the selected criteria will be suggested critical skills from this model.

Select OUs

**Critical Skills**

Critical skills are suggested to anyone aligned with the model and are used to measure skill readiness. Select any of the suggested skills below, or search for additional skills

0 / 250

Cancel

Save Draft

Publish

## Enter Capability Model Details

Enter the following information for the Capability Model:

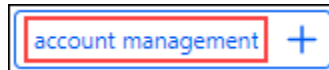
- **Capability Model ID** - When editing a capability, the model ID is displayed, but this value cannot be edited.
- **Name** - Enter a descriptive name for the Capability Model. The character limit is 250. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.
- **Description** - Enter a clear description for the Capability Model. The character limit is 2000. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.
- **Select Your Audience** - Select the **SELECT OUS** button to select one or more organizational units to define the audience for the Capability Model. Administrators can

select any type of organizational unit, including custom organizational units. Once an organizational unit is selected, administrators may select the **Include Subordinates** option to also include subordinate organizational units in the audience.

- **Critical Skills** - Select which skills are critical for the Capability Model by selecting the Plus icon next to the skill name. In this section, a list of suggested capabilities is displayed based on the Capability Model name and description. Suggestions are only displayed after entering a name, description, or audience. Administrators may also search for a skill by name. At least one skill must be selected.

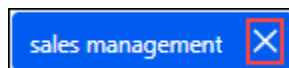
### View Skill Details

To view the details of a suggested or selected skill, select the skill name.



### Remove a Selected Skill

To remove a selected skill, select the Remove icon to the right of the skill name.



### Save Draft

Select the **SAVE DRAFT** button to save the current model as a draft. The model does not impact any users' suggested skills until it is published.

### Publish

Select the **PUBLISH** button to save and publish the Capability Model. When a Capability Model is published, any user who is within the model's defined audience is provided the model's critical skills as suggested skills in the *Skills You Might Have* section of their Skills Profile. Users are not suggested any critical skills that they have already declared.

## Capability Models - Impact on Skills Profile

When a Capability Model is published, any user who is within the model's defined audience is provided the model's critical skills as suggested skills in the *Skills You Might Have* section of their Skills Profile. Users are not suggested any critical skills that they have already declared.

To access the Skills Profile page, go to [HOME > UNIVERSAL PROFILE](#). Then, click the Skills tab.

To access another user's Universal Profile - Bio page, select the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Skills Profile page by clicking the Skills tab.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

[Back to Profile](#)

## Skills You Want to Develop

[...](#) [+](#)

We'll help you stay on track with your progress and prioritize suggested learning and development paths based on your preferences.

[🔖 finance](#) [...](#)

## Your Skills

[...](#) [+](#)

These are your confirmed skills. We'll help you track progress and identify relevant opportunities for development.

[finance](#) [...](#)[project management](#) [...](#)[accounting](#) [...](#)

## Skills You Might Have

Based on your profile information and feedback from your team

[financial reporting](#) [...](#)[leadership development](#) [...](#)[income statement](#) [...](#)[financial accounting](#) [...](#)[financial analysis](#) [...](#)[internal controls](#) [...](#)[See more](#) [v](#)

## Skills You Don't Want to Develop

[+](#)

We'll reduce recommendations for training & development for this skill, so you can focus on your development priorities.

[👁 tax](#) [...](#)



## Reporting Fields - Capabilities

With this enhancement, the following new Capabilities fields are added to the Capabilities section Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Linked Skill ID	This field displays the unique ID of the Cornerstone Skills Graph skill linked to the custom skill	Text
Linked Skill Type	This field displays the type of link, of the Cornerstone Skills Graph skill and the custom skill either equivalent or similar.	Text

### Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

### Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

## Skill Feedback Assignment Enhancements

## Skill Feedback Assignment Enhancements - Overview

With this enhancement, the following updates are made to the Skill Feedback Assignment functionality:

- A user avatar is added to the Skill Details flyout to make it clear whose profile you are viewing.
- Administrators with the appropriate permission can view the My Feedback Requests page for another user via the user's Universal Profile Skills page.

## How Does this Enhancement Benefit My Organization?

These enhancements provide an improved experience when using the Skills Feedback Assignment feature.

## Considerations

Administrators with the User Ratings - View Ratings and Feedback about Other User permission can only view the user's My Feedback Requests page for another user. Administrators are unable to edit or create requests while viewing a user's Feedback Request page.

## Implementation

This functionality is automatically enabled for all organizations.

## Permissions

The following existing permission is renamed:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Ratings - View Ratings and Feedback about Other User	<p>Grants ability to view ratings history and rating details about other people regardless of the visibility settings on the ratings. Grants ability to view the My Feedback Requests page. Administrators with this permission can view all ratings and feedback about all other users, regardless of the visibility settings of the ratings. This permission cannot be constrained.</p> <p>This permission does not bypass visibility ratings about yourself, which means users cannot use this permission to view ratings provided about themselves that are otherwise not visible to them.</p> <p>This permission is intended for an administrator or talent partner who needs broad access to all ratings occurring within the portal.</p>	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

### Security Roles

Upon release, the *User Ratings - View Ratings About Other Users* permission is renamed to *User Ratings - View Ratings and Feedback about Other User*.

## Skill Details Flyout - Added User Avatar

Prior to this enhancement, when reviewing the Skill Details flyout, it was not easy to identify whose profile was being viewed.

With this enhancement, the Skill Details flyout now displays the avatar of the user whose skill details are being viewed. This makes it clear whose skills profile and skill details are being viewed.

The user avatar is displayed below the skill description.

To view the Skill Details for a skill, navigate to the Skills Profile page. Then, select the skill name of a skill in your profile. [See Skills Profile](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

SKL-654

## general management

A general manager is an executive who has overall responsibility for managing both the revenue and cost elements of a company's income statement, known as profit & loss (P&L) responsibility. A general manager usually oversees most

[Show More](#)

Charles Cook

### Ratings



Beginner

Expert

Manager

[Rate Proficiency \(shared publicly\)](#)

## View Feedback Requests for Another User

Prior to this enhancement, administrators were not able to view the My Feedback Requests page for another user.

With this enhancement, administrators with the appropriate permission are able to view the My Feedback Requests page for other users.

When viewing the My Feedback Requests page of another user, the administrator can only view the page. They cannot create or edit any feedback requests. The Create Request button is not available, and the menu icon for each request is not available.

To view the My Feedback Requests page, go to [HOME > UNIVERSAL PROFILE](#). Then, from the Skills menu, select **My Feedback Requests**.

From the Skills Profile page, users may be able to view their request in the following areas:

- Skills Profile: Skills You Want to Develop - In the *Skills You Want to Develop* section of the Skills Profile, select the menu icon in the upper-right corner of the section. Then, select **My Requests**.
- Skills Profile: Your Skills - In the *Your Skills* section of the Skills Profile, select the menu icon in the upper-right corner of the section. Then, select **My Requests**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration
User Ratings - View Ratings and Feedback about Other User	Grants ability to view ratings history and rating details about other people regardless of the visibility settings on the ratings. Grants ability to view the My Feedback Requests page. Administrators with this permission can view all ratings and feedback about all other	Core Administration

users, regardless of the visibility settings of the ratings. This permission cannot be constrained.

This permission does not bypass visibility ratings about yourself, which means users cannot use this permission to view ratings provided about themselves that are otherwise not visible to them.

This permission is intended for an administrator or talent partner who needs broad access to all ratings occurring within the portal.

## My Feedback Requests

View, manage, and distribute requests so that you can collect ongoing feedback.

Title	Target Users	Format	Skills	Responses	Last Modified	Last Response
General Management Feedback Request	Myself	Proficiency Ratings shared with your Manager	1	0	Sep 19, 2022	<a href="#">View</a>



## Core/General Enhancements

## **Accessibility Enhancements**

The following improvements to accessibility have been made with this release:

- **Learning Accessibility Enhancements**
- **Reporting 2.0 Accessibility Enhancements**

## **Deprecation of Compensation Loads for Data Load Wizard (DLW) with the November 2022 Release**

The ability to perform Compensation loads and feeds using Data Load Wizard (DLW) is deprecated with the November '22 Release. DLW Compensation loads and feeds include Employee Salary, Salary Structure, and Individual Targets. The modern self-service Edge Import framework for all Compensation loads and feeds is available.

Since the deprecation was first announced, Cornerstone has reached out proactively to all impacted customers to help customers migrate loads and feeds to Edge. In addition, Employee Compensation has been enabled for Compensation customers. Both End-of-Support and EndOf-Life for Data Load Wizard Compensation loads and feeds will occur with the November '22 release on November 4.

## Deprecation of User and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) - November '22 Update

Data Load Wizard (DLW) is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

Edge Import addresses these issues with a modern UI and an intuitive workflow that can support a greater number of concurrent loads, while providing administrators with a delightful user experience. Edge Import offers manual loads and automated scheduled feed abilities.

Ability to perform Users and OU data loads and feeds using DLW was deprecated with an end-of-life in the May '22 Release for most customers. Some customers were excluded from the May '22 deprecation schedule due to missing feature parity in Edge Import.

Most of the missing parity features those customers were dependent on became available in Edge Import with the August '22 Release:

- Group and Group Membership loads
- Employee load enhancements:
  - GUID based create employee method and employee relationship fields support
  - Applicant to Employee conversion feature (Recruit)

### Remaining Milestones

All Data Load Wizard User and OU loads and feeds will be deprecated with the 2023 Q1 Release.

### Exception

The only exception is customers using Sensitive Personally Identifiable Information (SPII) fields in Data Load Wizard. These customers must meet the following criteria to be excluded:

- Have the Sensitive Information option enabled in CHR Enablement > Features with Restrictions
- The following fields appear in their Data Load Wizard User Load Template:
  - Date of Birth (SPII)
  - Social Security Number (SPII)

For the excluded customers, the following applies:

- Feature parity is planned for the 2023 Q1 Release
- Data Load Wizard loads and feeds will be deprecated with the 2023 Q2 Release.

**Important Note:** This exception does not apply to customers using custom fields to manage their SPII fields. For this use case, Data Load Wizard loads and feeds will be deprecated with the 2023 Q1 Release.

## Email Management - Default Email Address Settings

With this enhancement, administrators can use new settings in Corporate Preferences to set and update default From and default Reply-To email addresses for the portal. Once set, these default email addresses can be used in Email Administration as well as in Marketing Communications.

Portals with default email addresses configured via the legacy backend settings will have these email address automatically transferred to the new settings in Corporate Preferences.

To manage Corporate Preferences, go to [ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > CORPORATE PREFERENCES](#).

The following new settings are available in the new *Default Email Address Settings* section:

- **Default From Address** - Enter the default From Address for the portal. This value will automatically be populated in the **From Address** field when creating a new email in Email Management or Marketing Communications. The From Address is the email address that appears as the sender's email address when the email is sent. **Note:** *It may take a few minutes for this value to update.*
- **Default Reply-To Address** - Enter the default Reply-To Address for the portal. This value will automatically be populated in the **Reply-To Address** field when creating a new email in Email Management or Marketing Communications. The Reply-To Address is the email address that any reply messages are sent to if someone replies to the email.

Updating or removing email addresses from these setting only impact newly created emails and templates. Existing emails and templates are unaffected. In order to update an existing email or template, they must be updated manually within the email or template.

**Default Email Address Settings**  
Default email address(es) which can be used for emails and marketing communication templates:  
  
Default From Address:   
Default Reply-To Address:   
  
Please note : Updating or removing the email address(es) has only an impact on newly created emails and templates. Existing emails and templates remain unaffected.

### How Does this Enhancement Benefit My Organization?

This enhancement provides self-service ability to update default email address settings without contacting customer support for assistance.

### Frequently Asked Questions (FAQs)

Will my currently defined Default From Address and Default Reply-To Address be transferred automatically to the new Default Email Address Settings?

Yes, in case you have a previously defined Default From or Default Reply-To Address, it will be transferred to the new Default Email Address Settings.

How can I update the default email address in existing emails and templates?

Currently, the default email address in existing emails and templates can be only adjusted manually by updating each email and template.

Can I run a report to see which emails and templates are using the default email address?

Currently, there is no option to run a report with the required detail.

Implementation

This functionality is automatically enabled for all organizations. Access is controlled by the existing *Corporate Preferences - Manage* permission.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Corporate Preferences - Manage	Grants ability to manage Corporate Preferences, which includes several portal-wide settings. This is an administrator permission.	Core Administration

## November '22 Language Pack Updates

New updates to Cornerstone Language Packs and additional languages are available with the November '22 Release. Please visit the [November '22 Language Pack Updates](#) posting to review the full list of changes and their targeted availability in stage and production environments.

Languages with updates for the November '22 Release include:

- Bulgarian
- Czech
- German
- Greek
- Hebrew
- Malaysian
- Spanish (Spain)
- Turkish
- Vietnamese

**This functionality is not available at the start of UAT.**

### Implementation

This functionality is automatically enabled for all organizations.

## Security Health Check Enhancements



## Security Health Check Enhancements

Security Health Check is an existing administrator tool that enables customers to view their portal's security settings.

With the November '22 Release enhancements to Security Health Check, customers can do the following:

- Edit security issues to the Cornerstone recommended value
- View and export the Modification History in Microsoft Excel file format

## Best Practices

- Organizations should consult with their IT Security team and test in Pilot and Stage environments before making any updates to security settings in the Production environment.
- Cornerstone maintains recommended values for portal security. Depending upon an organization's portal configuration (ie: custom coding, scripts, etc), updating a setting to the Cornerstone recommended value may impact portal functionality (ie: custom HTML links, etc).

## How Does this Enhancement Benefit My Organization?

This Security Health Check enhancement strengthens the joint responsibility model between Cornerstone and its customers, allowing customers to manage and review updates to their portal's security settings.

## Considerations

Administrators can only change the value for security issues, which are security settings that are in a critical or warning status. Further, administrators can only change security settings to the Cornerstone recommended value. To change a value for a non-security issue or to change a setting to a non-recommended value, administrators must contact customer support, which is the previously existing process.

Partners maintain View Only access but they can be granted the ability to view and export the Modification History.

The Security Health Check Modification History is environment specific. Also, updates to security settings that were made prior to the November release are not displayed.

## Frequently Asked Questions (FAQs)

### What if I have no security issues?

Your security settings are set to Cornerstone's recommended values. No action for you at this time.

### What is a security issue?

For your security, Cornerstone maintains recommended values for all security settings and encourages customers to review and update their portal's settings to align with Cornerstone's recommended values. A security issue is present when your portal's current security setting value does not align with Cornerstone's recommended value.

### How do I resolve a security issue?

If a security issue is present, you can now edit the security setting to the Cornerstone recommended value from the Security Health Check page instead of reaching out to Global Customer Support.

We highly recommend that you review these security settings with your IT Security team and test in Pilot and Stage before applying any updates to Production.

#### Do I need to resolve my security issue?

You may not need to resolve a security issue. For some organizations, a security setting has been intentionally set to a less secure value to support specific needs. Please consult your IT Security team before making any changes to your security settings.

#### How do I change the value on non-security issues?

To request the value be changed for a non-security issue, please contact Global Customer Support.

#### What if I have no items in my Modification History?

The Modification History reflects updates to your security settings following the release of this functionality.

Please note that historical updates via Global Customer Support cases are not reflected in the Security Health Check Modification History at this time. Should you require historical detail, please reach out to Global Customer Support.

#### Why are some security issues labeled as critical (red) and others are labeled as warning (yellow)?

Cornerstone has designated security issues as critical (red) or warning (yellow) levels based on a number of security criteria, including but not limited to the security vulnerability the setting may expose your portal to when not set to Cornerstone recommended value. We recommend you review all security issues with your IT Security team to evaluate the risk and criticality for your portal.

#### Why are these settings included in my Security Health Check?

The full list of settings that are displayed in your Security Health Check are commonly requested by customers or used during Penetration Tests.

### Implementation

This functionality is automatically enabled for all organizations.

The ability to edit a security issue value is controlled by the *Security Health Check - Edit Security Issues* permission.

### Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Security Health Check - Edit Security Issues	Grants ability to edit security issue settings in the Security Health Check tool and set them to Cornerstone's recommended value. This permission cannot be constrained. This is an administrator permission.	Core Administration
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The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Health Check - View	Grants ability to view the Security Health Check tool. This permission cannot be constrained. This is an administrator permission.	Core Administration

### Security Roles

Upon release, the new *Security Health Check - Edit Security Issues* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

## Security Health Check Page - Edit Settings and View History

With the November '22 Release enhancements to Security Health Check, customers can do the following:

- Edit security issues to the Cornerstone recommended value
- View and export the Modification History in Microsoft Excel file format

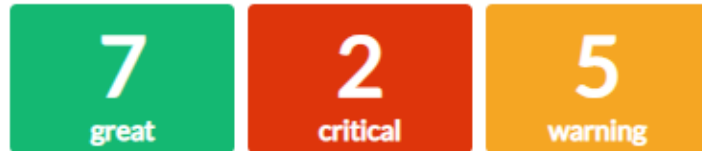
To access the Security Health Check tool, go to [ADMIN > TOOLS > CORE FUNCTIONS > SECURITY HEALTH CHECK](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Health Check - Edit Security Issues	Grants ability to edit security issue settings in the Security Health Check tool and set them to Cornerstone's recommended value. This permission cannot be constrained. This is an administrator permission.	Core Administration
Security Health Check - View	Grants ability to view the Security Health Check tool. This permission cannot be constrained. This is an administrator permission.	Core Administration

# Security Health Check

## Current Security Health Status



### Recommended Actions

	<b>Encode Training Text</b> This setting only applies to LO Details, Transcript Details and Course Console p...	<a href="#">Resolve</a>
	<b>Secure HTML</b> When True, this setting enables a system wide HTML security processor that strip...	<a href="#">Resolve</a>
	<b>Auto-close Browser on Logout</b> This setting only applies to Internet Explorer and Chrome. When True, this settin...	<a href="#">Resolve</a>
	<b>Enable reCAPTCHA</b> This setting only applies to Self Registration, Forgot Password and Job Referral...	<a href="#">Resolve</a>

### View and Edit Modification History

A new menu icon is available in the upper-right corner of the Security Health Check page. This menu contains the following options:

- View Modification History - Select this option to view the modification history in a flyout.
- Export Modification History - Select this option to export the modification history to a Microsoft Excel file.

The Modification History contains the following information:

- Name of the security setting that was modified
- Original and updated value for the setting
- Name of the user who modified the setting

- Date and time of the update

### **Resolve a Security Setting**

Prior to this release, administrators could select the **Resolve** link for any security setting that is in a critical or warning status. This opened a Resolve Security Issue flyout that displayed additional details about the setting. Administrators could select the **CREATE SUPPORT TICKET** button that would open Support Central where named administrators could open a support ticket to change the setting.

With this release, for administrators who have permission to edit security settings, the Resolve Security Issue flyout contains an **EDIT** button.

Administrators can only change the value for security issues, which are security settings that are in a critical or warning status. Further, administrators can only change security settings to the Cornerstone recommended value. To change a value for a non-security issue or to change a setting to a non-recommended value, administrators must contact customer support, which is the previously existing process.

## Security Role Administration Enhancements

With this enhancement, when creating or updating a security role in Security Role Administration, the security role name is displayed. Upon saving a new or edited role, administrators are directed to the security role table with the role displayed in the search result.

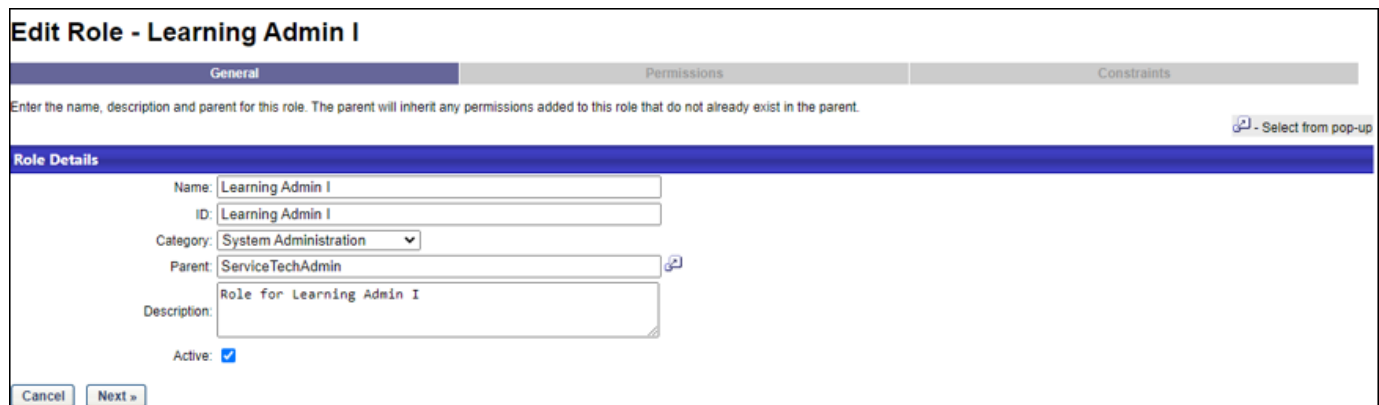
To access Security Role Administration, go to [ADMIN > TOOLS > CORE FUNCTIONS > SECURITY ROLE ADMINISTRATION](#).

When creating a security role, the name of the security role is displayed in the page header on the Permissions and Constraints steps. When creating a security role, the name of the security role is not displayed on the General step because the security role name has not yet been defined.



The screenshot shows the 'Create Role - Learning Admin I' form with the 'Permissions' tab selected. The form has three tabs: 'General', 'Permissions', and 'Constraints'. Below the tabs, there is a message: 'Add the appropriate permissions for this role. If a permission exists in one or more child role, it cannot be removed from the parent role directly.' Below this message, there are two links: 'Add Permissions' and 'Copy Permissions from Another Role'. A blue bar with the text 'Role Permissions' is visible. At the bottom, there are four buttons: 'Back', 'Cancel', 'Save', and 'Next »'.

When editing a security role, the name of the security role is displayed in the page header on the General, Permissions, and Constraints steps.



The screenshot shows the 'Edit Role - Learning Admin I' form with the 'General' tab selected. The form has three tabs: 'General', 'Permissions', and 'Constraints'. Below the tabs, there is a message: 'Enter the name, description and parent for this role. The parent will inherit any permissions added to this role that do not already exist in the parent.' Below this message, there is a link: 'Select from pop-up'. A blue bar with the text 'Role Details' is visible. Below this bar, there are several input fields: 'Name' (Learning Admin I), 'ID' (Learning Admin I), 'Category' (System Administration), 'Parent' (ServiceTechAdmin), and 'Description' (Role for Learning Admin I). There is also a checkbox for 'Active' which is checked. At the bottom, there are two buttons: 'Cancel' and 'Next »'.

Upon saving a new or edited role, the administrator is directed to the Security Role Administration page with the new or edited role displayed in the search results. This enables the administrator to conveniently perform additional operations on the role, such as adding or removing users.

## Security Role Administration

Use this tool to create and edit security roles. Click on the Users icon to view which users have this role and to apply individual constraints to the users.

Search:

☒ Include Inactive Roles

[Create New Role](#)
[Manage Categories](#)

[View Hierarchy](#)

[< Previous](#)
1-1 of 1
[Next >](#)

ROLE	ID	DESCRIPTION	CATEGORY	USERS	OPTIONS
Learning Admin I	Learning Admin I	Role for Learning Admin I	System Administration		

## How Does this Enhancement Benefit My Organization?

This enhancement helps to prevent inadvertent errors when creating or updating security roles.

## Considerations

Role name is not visible in portals where breadcrumbs are disabled via the "Hide Breadcrumbs" setting in Display Preferences. To access the Hide Breadcrumbs setting, go to: [ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > THEME AND LOGO](#). Select a Division to access the Display Preferences.

## Implementation

This functionality is automatically enabled for all organizations.

## Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Administration - Manage	Grants ability to create, modify and constrain security roles within the portal, and assign users to those security roles. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration



## Edge Import

## Edge Import - Delete Feeds

Prior to this enhancement, customers needed to submit a work order to delete a feed.

With this enhancement, a new **DELETE THIS FEED** button is available on the Overview tab of the feed settings. Clicking this button deletes the feed.

When a feed is deleted, all scheduled runs for the feed are cancelled permanently. This button only appears on the Overview tab of the feed settings, and it is only available to administrators who have the *Delete Feeds* permission. In addition, only disabled feeds can be deleted.

A deleted data feed cannot be restored.

To access the Feed Settings page, go to [ADMIN > TOOLS > EDGE > IMPORTS AND FEEDS](#). Then, select the **FEED SETTINGS** button. Then, select the appropriate feed.

[Feed Settings](#) > qa01-eip Feed 2976

## qa01-eip Feed 2976

No active files No schedule

[What is this?](#)

[Overview](#) [File Setup](#) [Scheduling](#) [Notifications](#) [Encryption](#) [Change Log](#)

### FTP Location

Account Name	Path
qa01-EIP	\\LAX-QA-FS111\FTP\clients\qa01-eip\EdgeImport\Feed2976

[Change FTP Path](#)

### Files

No active files  
At least one file must be added and included in the feed prior to enabling the feed.

[+ Add File](#)

### Schedule

No schedule  
A schedule must be set prior to enabling the feed

[⌚ Set Schedule](#)

### Encryption

No Encryption Key  
The feed is not configured to use any encryption keys.

[+ Select Key](#)

### Notifications

No Notifications  
The feed is not configured to send notifications

[+ Add Notification](#)

### Last Run

This feed has never run.

### Next Run

Not Applicable. Schedule not saved.

### Status

Disabled. The feed cannot be enabled at this time. Please check warning messages.

### Delete this Feed

[Delete this Feed](#)

## How Does this Enhancement Benefit My Organization?

This enhancement provides self-service ability for customers to delete feeds without needing to engage customer support.

## Implementation

This functionality is automatically enabled for all organizations using Edge Import.

The ability to delete feeds is controlled by the new *Delete Feeds* permission.

## Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Delete Feeds	Grants ability to delete disabled Edge Import feeds. Users with this permission can delete disabled feeds created by anyone for all types of data feeds. This permission cannot be constrained. This is an administrator permission.	Edge Import

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Set up Feed	Enables administrator to access the Feed Settings page where the administrator can create and update feeds and schedule feeds. This permission does not grant the ability to activate feeds or manually run feeds. This permission cannot be constrained. This is an administrator permission.	Edge Import

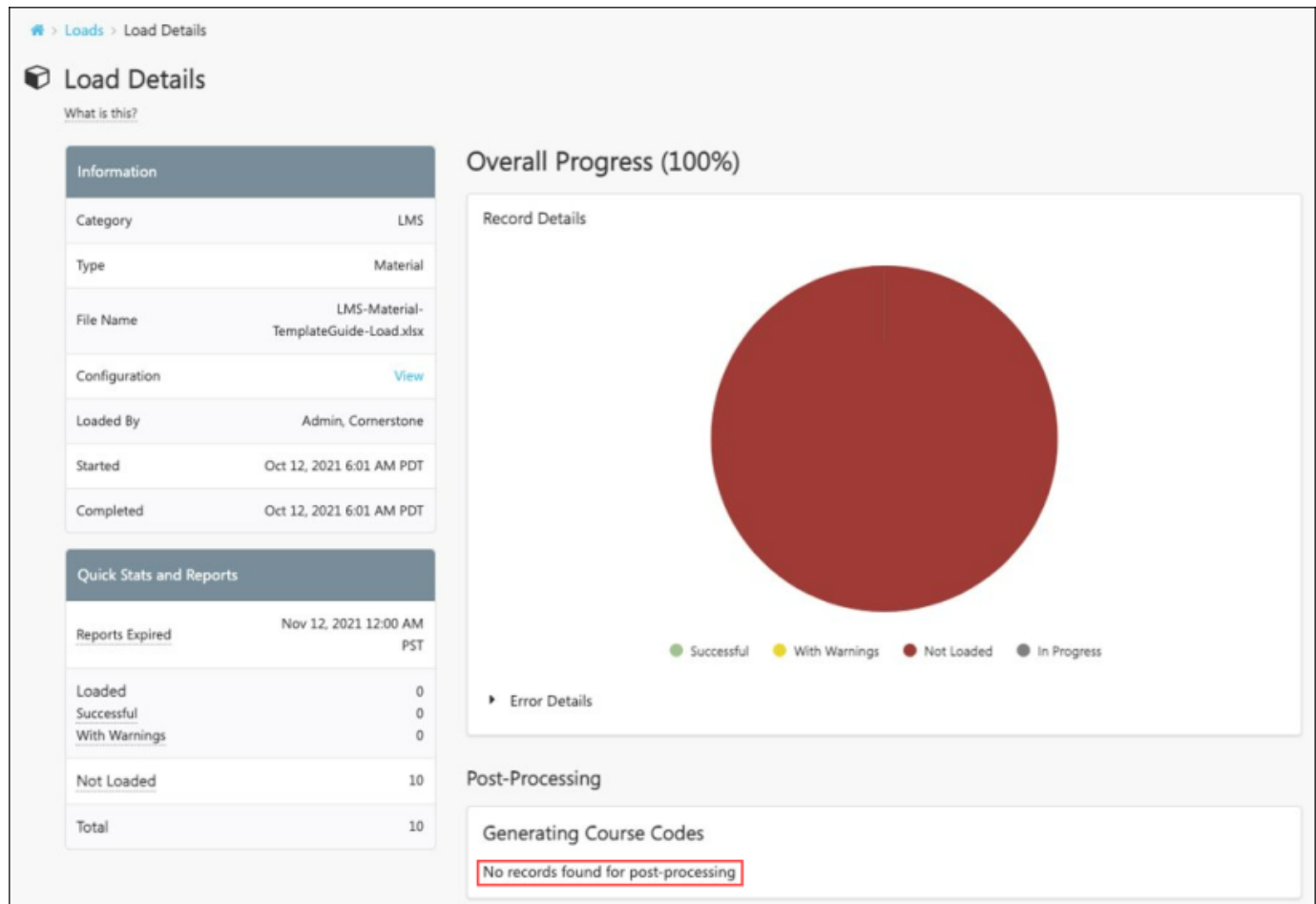
## Security Roles

Upon release, the new *Delete Feeds* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

## Edge Import - Display "No Records Found" for Post Process of a Load

Prior to this enhancement, customers were not notified if an Edge Import load was not successful due to having no eligible records. This is because for post processing, reports only show errors, so if there are no records sent to post processing, there would not be any notification in the report.

With this enhancement, when a load is not successful due to having no eligible records, a "No records found for post-processing" message is now provided in the *Post Processing* section of the Load Details page.



### How Does this Enhancement Benefit My Organization?

With a new descriptive message available in the post process step when no eligible records are found, customers can resolve the issue themselves or provide better information when requesting support.

### Implementation

This functionality is automatically enabled for all organizations using Edge Import.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Create/Update Configurations	Grants ability to create and update Edge Import configurations. This permission cannot be constrained. This is an administrator permission.	Edge Import

## Edge Import - Learning Load Enhancement (ILT Sessions Load)

Prior to this enhancement, the ILT Session load in Edge Import did not support translation loads while all other learning object types did support translation loads.

With this enhancement, the ILT Session load in Edge Import now supports the loading of values in all translatable fields, including text type custom fields.

A new **Is this a translation load?** question is now available when downloading the template guide and when creating or editing the configuration for ILT Session loads. Selecting “Yes” supports this new translation load capability. Selecting “No” allows for the regular load to create and update data. This translation load is similar to what currently exists for other training load types.

Bulk API is also supported with this enhancement.

### How Does this Enhancement Benefit My Organization?

This enhancement provides support for translation loads.

### Implementation

This functionality is automatically enabled for all organizations using Edge Import. The template guide in Edge Import will be updated to reflect this enhancement.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Sessions Load	Grants access to the Sessions data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

## Edge Import - Learning Load Enhancement (ILT Transcript Load)

Prior to this enhancement, Transcript Status was always required for ILT Transcript loads. This made it difficult to update certain metadata fields.

With this enhancement, Transcript Status is optional for ILT Transcript loads. This makes it easier to update certain metadata fields. Transcript Status continues to be required for new ILT Transcript record creation.

The following related fields can be updated irrespective of the current transcript status and are supported with this enhancement:

- Archived
- Comments
- Completed Date
- Due Date

Bulk API is also supported with this enhancement.

### How Does this Enhancement Benefit My Organization?

This enhancement makes it easier to update transcript metadata fields.

### Implementation

This functionality is automatically enabled for all organizations using Edge Import. The template guide in Edge Import will be updated to reflect this enhancement.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - ILT Transcripts Load	Grants access to the ILT Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import



## Edge Import - Learning Load Enhancement (Training Loads)

Prior to this enhancement, when using Edge Import to update existing training, the unique identifier was required and all fields for data creation were also required, plus the fields that needed updating. This often meant that several fields had to be provided in the load even when a single field needed updating.

With this enhancement, when using Edge Import to update existing curricula, materials, online course metadata, tests, and videos, if “Learning Object ID” is selected as the unique identifier during import, then only the Learning Object ID is required. All other fields become optional. This allows for easier bulk updates because only the unique identifier and the updated fields need to be populated in the import file.

The following load types support this functionality:

- Curriculum
- Material
- Online Course Metadata
- Test
- Video

ILT Events, ILT Sessions, and ILT Session Parts loads already support this functionality.

Bulk API is also supported with this enhancement.

### How Does this Enhancement Benefit My Organization?

This enhancement enables easy bulk updates for existing training.

### Implementation

This functionality is automatically enabled for all organizations using Edge Import. The template guide in Edge Import will be updated to reflect this enhancement.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Curriculum Load	Grants ability to access load reports and perform Curriculum load and Curriculum Structure loads via	Edge Import

	Edge Import. This permission cannot be constrained. This is an administrator permission.	
Access LMS - Materials Load	Grants access to the Material data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Online Course Metadata Load	Grants access to the Online Course Metadata data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Videos Load	Grants access to the Videos data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Tests Load	Grants access to the Tests data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

## Edge Import - Learning Load Enhancements (Transcript Loads)

With this enhancement, the Curriculum Transcript, External Training, ILT Transcript, Material Transcript, Online Course Transcript, OLCO Transcript, Test Transcript, and Video Transcript loads now include the following features:

- Show user performing the load as the actor in Transcript History
- Due Date edited time in Transcript History is the time when data was loaded
- Due Date acceptable format and default value

This enhancement only impacts the following load types:

- Curriculum Transcript
- External Training
- ILT Transcript
- Material Transcript
- OLCO Transcript
- Online Transcript
- Test Transcript
- Video Transcript

Bulk API is also supported with these enhancements.

### Show user performing the load as the actor in Transcript History

Prior to this enhancement, when the transcript due date was updated via Edge Import, Transcript History indicated that the learner had updated the due date.

With this enhancement, when the transcript due date is updated via Edge Import, Transcript History now indicates that the person who performed the load is the person who edited the due date.

This enhancement only applies to due date modification in the Transcript History.

### Due Date edited time in Transcript History is the time when data was loaded

Prior to this enhancement, when the due date for a training item was updated via Edge Import, Transcript History listed the due date as the time at which the due date was updated.

With this enhancement, when the due date for a training item is updated via Edge Import, Transcript History now indicates the load time as the time at which the due date was updated.

This enhancement only applies to due date modification in the Transcript History.

### How Does this Enhancement Benefit My Organization?

This enhancement provides improved due date audit and format.

### Implementation

This functionality is automatically enabled for all organizations using Edge Import. The template guide in Edge Import will be updated to reflect this enhancement.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Curriculum Transcripts Load	Grants access to the Curriculum Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - External Training Load	Grants access to the External Training data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - ILT Transcripts Load	Grants access to the ILT Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Material Transcripts Load	Grants access to the Material Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Load	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Online Transcripts Load	Grants access to the Online Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Video Transcripts Load	Grants access to the Video Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Access LMS - Test Transcripts Load	Grants access to the Test Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
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## Edge Import - Performance Load Enhancements (User Goals Load)

The following enhancements to User Goals loads are included with the November '22 Release:

- Goal Status and Progress updates reflect current status and progress instead of default portal values.
- Goals can be imported in Locked status. **Note:** *Edge Import displays a warning if locked goals are present in the load when goal locking is not configured in the portal.*
- Perspective and Category are ID-based instead of text-based, reducing typos.
- Goal Weight is display per precision value set in the portal instead of being rounded to the nearest whole digit.

### Goal Status and Progress

Prior to this enhancement, goals loaded via Edge Import would not contribute to a user's overall goal progress and status.

With this enhancement, goals loaded via Edge Import accurately impact a user's status and progress. The Goal Status is dependent on the portal configuration.

### Goal Lock

Prior to this enhancement, goals loaded via Edge Import could not be loaded in Locked status.

With this enhancement, goals can be loaded in a Locked or Unlocked status via a new **Lock Goals** setting in the template guide. However, a warning is displayed if goals are loaded in a Locked status and goal locking is not enabled for the portal.

Following the November '22 Release, customers must create a new configuration so that the newly added field header is included. Please refer to the template guide for acceptable values for this field.

**Note:** *When a goal is loaded in the Locked status, users cannot edit this goal.*

**Note:** *Edge Import does not currently support unlocking, editing, or deleting goals.*

**Note:** *The ability to lock goals and load goals in the Locked status is controlled by a backend setting. To enable this functionality, contact Global Customer Support.*

### Perspective and Category

Prior to this enhancement, administrators could only load a text value for the Perspective and Category fields. This created issues when an incorrect text value was entered accidentally.

With this enhancement, administrators must load an ID value for the Perspective and Category fields. By entering ID values for these fields, this reduces the possibility of text-based errors. Organizations must now provide Perspectives and Categories using their ID values when creating goals via Edge Import. Organizations can no longer provide text values for these fields.

Following the November '22 Release, customers must create a new configuration so that the newly added field headers are included. Please refer to the template guide for acceptable values for these fields.

**Note:** *Perspective and Category values must be configured in the portal prior to loading goal data.*

### Goal Weight Precision

Prior to this enhancement, goals loaded via Edge Import would round the goal weight to the nearest whole digit.

With this enhancement, goal weight for goals loaded via Edge Import uses the precision value configured for the portal.

### Considerations

Edge Import does not currently support unlocking, modifying, or deleting goals.

Edge Import does not currently support loading Task and Target values for goals.

### Implementation

This functionality is automatically enabled for all organizations using Edge Import. The template guide in Edge Import will be updated to reflect this enhancement.

**This functionality is not available at the start of UAT.**

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Import - User Goal Load	Grants access to the User Goal Load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

# Integrations and APIs



## Developer Portal Replaces API Explorer and Edge Answers

Cornerstone is excited to share that the Developer Portal has replaced Edge Answers. The Developer Portal is one-stop shop for API and connector documentations and examples.

The Developer Portal can be accessed via <https://csod.dev> and from within Cornerstone portals by navigating to [ADMIN > TOOLS > EDGE > DEVELOP > DEVELOPER PORTAL](#). Once inside, click Learn more to get started.

Developer Portal FAQ, which is replacing Edge Answers, will include frequently asked questions about Cornerstone's APIs and connectors. Integration-specific FAQs are available in [Knowledge Central](#).

What to expect with the November '22 Release:

- Edge Answers is not accessible as of the November '22 Release.
- Edge Answers is replaced by Developer Portal FAQ (<https://csod.dev/faq/>)
  - Impacted pages where Edge Answers is replaced
    - Edge Home Page ([ADMIN > TOOLS > EDGE](#))
    - Edge Integration Center
    - Edge Marketplace
    - API Management
    - Bulk API History
    - Imports and Feeds

API Explorer is still accessible via a footer link on the Developer Portal.

### Implementation

This functionality is automatically enabled for all organizations.

## **Soap API Deprecation in 2023 Q4**

All Cornerstone SOAP APIs, except Transcript APIs (/webservices/LMS/LOWS.asmx), will be deprecated in Q4 of 2023. This will impact only a subset of API customers. If you are impacted by this upcoming change, you will receive an email from Cornerstone in November 2022 with information detailing the actions you will need to take prior to this deprecation.

## Reporting 2.0

## Deprecation of Custom Reports - Phase 2

The deprecation of Custom Reports that began with the August '22 release will continue with Phase 2 of the deprecation occurring with the November '22 Release. The deprecation is implemented in phases to give customers time to prepare and to complete their migration to Reporting 2.0. With Phase 2, some Custom Reports features are removed. Please review the Deprecation phases and their milestones at the end of this deprecation announcement.

Customers who wish to migrate their custom reports to Reporting 2.0 ahead of the 2022 deprecation can do so by using the Custom Reports Migration Tool available in Reporting 2.0.

Customers must migrate any custom reports they wish to keep. There is no auto-migration of reports to Reporting 2.0.

### Deprecation Phases

Phase 1 - August '22 Release (5 August - Q3):

1. Remove "create" permission, customers can no longer create new Custom Reports.
2. Remove "edit" permission, customers can no longer edit existing Custom Reports.
3. Remove options for customers to add new deliveries (scheduled, FTP, email, etc.)
4. Continue support for running existing Custom Reports, including existing scheduled reports.
5. Continue to support migration.

Phase 2 - November '22 Release (4 November - Q4):

1. Stop all Custom Report deliveries (scheduled, FTP, email, etc.)
2. Ad-hoc run of Custom Reports remains possible.
3. Continue to support migration.

Phase 3 - February '23 Release (February - Q1 2023):

1. Remove all remaining access for Custom Reports.
2. Customers can no longer use or migrate Custom Reports at all.

### Permissions

Permissions in Reporting 2.0 are different than the permissions for Custom Reports. Custom Reports had a "Manage" permission for creating and editing reports and a "View" permission for viewing reports, whereas Reporting 2.0 permissions are more granular and users need to be given multiple permissions in order to create or view reports.

It is important to be aware of the differences between permissions in Reporting 2.0 and those in Custom Reports so that users have all necessary permissions to begin using Reporting 2.0.

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

## Deprecation of the "User Record as of a Date" Standard Report in 2023 Q1

The "User Record as of a Date" Standard Report will be deprecated in the first quarter of 2023.

As an alternative, customers with Cornerstone HR enabled in their portal and using the effective dating feature or the aggregate audit feature, can use the "Point-in-time Headcount Details" report. This report provides a list of user records for a specific date at any point in time.

Customers who do not have Cornerstone HR enabled can use Reporting 2.0 instead.

**Note:** *For customers who do not use Cornerstone HR, this report did not respect any past/future point in time relations/data values. Generated results were based on an "as of now" dataset which is why Reporting 2.0 is a viable alternative.*

## **Reporting 2.0 - Additional Fields**

The following additions and updates have been made to Reporting 2.0 fields with this release:

- **Reporting Fields - Capabilities**
- **Reporting Fields - Check-Ins**
- **Reporting Fields - Goals**
- **Reporting Fields - Learning**
- **Reporting Fields - Performance Review**
- **Reporting Fields - Recruiting**

## **Reporting 2.0 - Accessibility Enhancement**

Prior to this enhancement, the content of the Reporting 2.0 builder page did not resize correctly when zoomed to 400% and viewed at 1280px wide. This may have an impact on users with limited vision who need to read content in one column.

With this enhancement, the Reporting 2.0 Builder page content will be resized correctly when zoomed to 400% and viewed at 1280px wide so it can be viewed in one column when magnified.

### **How Does This Enhancement Benefit My Organization?**

Users will have an improved user experience. This will be of particular benefit to users with limited vision.

### **Implementation**

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

## Reporting 2.0 - Audit PDF Format Changes

Audit PDFs are available for some highly regulated customers, and they are available for download on the Reporting 2.0 homepage.

Prior to this enhancement, the Audit PDF displayed the "**Date Generated**" in a digit-only format (e.g., 01.01.2022), and this led to confusion for global organizations as there are cultural differences towards date formats. In addition, the "**Generated by**" field displayed the user's full name, but this proved ambiguous as names are not always unique.

With this enhancement, Audit PDF is updated with the following improvements:

- "**Generated by**" now shows User Full Name and the unique identifier of User ID
- "**Date Generated**" is displayed as MONTH, DD, YYYY i.e. MAR 25, 2022

### How Does this Enhancement Benefit My Organization?

Improvements to metadata make it easier to know who generated the report and when.

### Implementation

This functionality is on by default for customers that have the Audit PDF export option enabled via a backend setting. This PDF is used by some highly regulated customers; most customers will not be impacted by this enhancement.



## Reporting 2.0 - Calculated Fields Enhancements

With this release, the following enhancements are made to the Calculated Fields functionality:

- Include multiple check-box custom fields in calculated fields
- Ability to select 0 as an option for Decimal Points in numeric Calculated Fields

## Include multiple check-box custom fields in calculated fields

Prior to this enhancement, Reporting 2.0 did not provide users the ability to include multiple check-box custom fields. With this enhancement, users can build calculated fields that include values from multiple checkbox custom fields.

### Calculated Field Editor

Name\*

Description

Output Format  
Boolean ▾

Formula\* Show Operators

☒ Publish Field Globally

**Fields** Functions

Q Search

Training Request Forms (26)

Custom Fields (21)

- Departure
- Dinner
- Dinner - day 1
- Dinner - day 1
- Dinner for the day before the training
- Dinner for the day before the training
- food intolerances
- Hotel after the first day
- Hotel for the day before the training
- Hotel for the day before the training
- Hotel room
- If yes, dinner from

## Ability to select 0 as option for Decimal Points in numerici Calculated Fields

Prior to this enhancement Reporting 2.0 did not provide users the ability to select 0 as an option for Decimal Points in Calculated Fields, and users get confused the option “None” for 0.

With this enhancement, an option to select 0 the Decimal Point drop-down is available, so that "None" is not confused with 0. When a user selects 0 as a decimal point, it will removes all decimal points for the number and rounds it off to the nearest value e.g., 10.3 will be rounded off as 10 and 10.6 will be rounded off as 11.

#### **Example 1 - no rounding required**

When a user requires no rounding then the following approach should be taken: user should select "None" as an option in the Decimal Point drop-down field.

#### **How Does this Enhancement Benefit My Organization?**

This enhancement expands capability and provides flexibility when using calculated fields containing multiple checkbox custom fields.

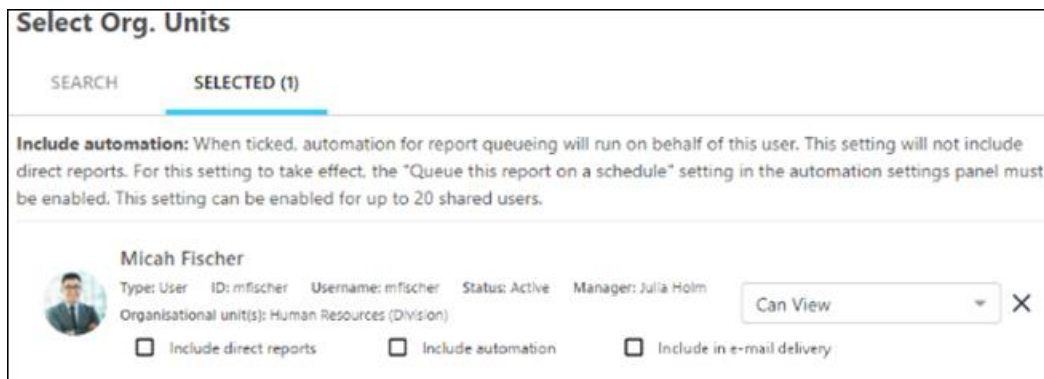
#### **Implementation**

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

## Reporting 2.0 - Connect Share User and Email Delivery Setting

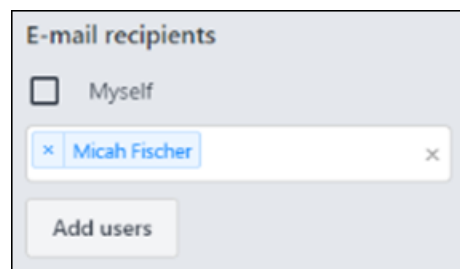
Prior to this enhancement, users had to carry out double effort to share a report to a set of users and to then email the report to the same set of users.

With this enhancement, in **Share Report**, when choosing the recipients, the user has the option in the selected users tab with a checkbox to **include in e-mail delivery**.



The screenshot shows a 'Select Org. Units' window with a 'SEARCH' tab and a 'SELECTED (1)' tab. Below the tabs is a text box explaining the 'Include automation' setting. Below that is a user card for 'Micah Fischer' with details: Type: User, ID: mfisher, Username: mfisher, Status: Active, Manager: Julia Holm, and Organisational unit(s): Human Resources (Division). There is a 'Can View' dropdown menu and a close button. At the bottom are three checkboxes: 'Include direct reports', 'Include automation', and 'Include in e-mail delivery'.

Selecting the box **Include in e-mail delivery** will also add the user as an e-mail delivery recipient for a report upon save, and the checkbox will be automatically selected if the recipient is added via report builder schedule properties .i.e., it will be synced in both the ways.



The screenshot shows an 'E-mail recipients' list. It has a checkbox for 'Myself' and a search bar containing 'Micah Fischer' with a close button. Below the search bar is an 'Add users' button.

Unselecting the **Include in e-mail delivery** box through the Share Report fly-out would upon save also remove the user from the list of e-mail recipients, and editing the email list in schedule properties with addition or removal of recipients should select or unselect the **Include in e-mail delivery** checkbox respectively.

**Note:** The "Include in e-mail delivery box" is disabled if "Deliver to email" toggle is OFF in report builder or user does not have the relevant permissions to share reports via email.

### How Does this Enhancement Benefit My Organization?

Users can save time and effort as they can now easily share a report with users and have the report delivered through email to the same set of users from the report share fly-out.

### Implementation

This functionality is automatically enabled in all portals using the Reporting 2.0 module.

## Reporting 2.0 - Constrain Capabilities "View" Permissions

Prior to this enhancement, Reporting 2.0 Capabilities permissions could not be constrained. As a result managers were not able to view capabilities related to just their team.

With this enhancement, the *Reporting - Core - Capabilities Report – View permission* (in Report level permissions) and the *Reporting - Core - User Capabilities - View permission* (in Granular permissions) will be constrained on following user and OU constraints:

- Restrict to OU
- Restrict to User's OU
- Restrict to User Self And Subordinates
- Restrict to User
- Restrict to User's Self
- Restrict to User's Manager
- Restrict to User's Subordinates

### How Does this Enhancement Benefit My Organization?

Skills reporting can now be constrained to enable capability data relating to just a manager's team to be displayed and shared.

### Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

## Reporting 2.0 - Email Delivery Permission Enhancement

Prior to this enhancement, the behavior of the *Reporting - Email Delivery* permission was confusing as the permission is required both to set up reports to be delivered through email and to receive reports through email.

Following this enhancement the Reporting - Email Delivery permission is only required to setup reports to be delivered through email and no permission is required to receive reports.

Additionally, in the Report Builder, the Email Recipients **Add Users** button, which is visible in the **Schedule Delivery Options** flyout when **Deliver to Email** is toggled ON, is only visible to users that have both the *Reporting - Email Delivery* permission and the *Reporting - Share* permission.

### How Does this Enhancement Benefit My Organization?

The changes to the *Reporting - Email Delivery* and the *Reporting - Share* permission will simplify steps for setting up report delivery via email.

### Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Email Delivery	<p>Grants ability to deliver reports via email in Reporting 2.0. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Subordinates, and Employee Relationship.</p> <p>This permission is used in conjunction with the view permission for Reporting 2.0 and can also be used in conjunction with the various product, section, and field level permissions.</p> <p><b>Note about Constraints:</b> <i>The constraints for this permission determine to whom you can deliver the report. The constraints do not pertain to the data you can see in the report.</i></p>	Reporting
Reporting - Share	<p>Grants access to share reports in Reporting 2.0. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Self, User's</p>	Reporting

Manager, User's Superiors, User's Subordinates, User's Direct Subordinates, and Relationship.

This permission is used in conjunction with the view permission for Reporting 2.0 and can also be used in conjunction with the various product, section, and field level permissions. Users must have permission to view Reporting 2.0 in order to have access to a report that is shared with them. If they do not have view access, then the Reporting 2.0 navigation sublink will not display for them.

Users who have permission to manage Reporting 2.0 can edit a report that is shared with them. They can also copy the shared report.

***Note about Constraints:*** *The constraints for this permission determine who you can share the report with. The constraints do not pertain to the data you can see in the report.*

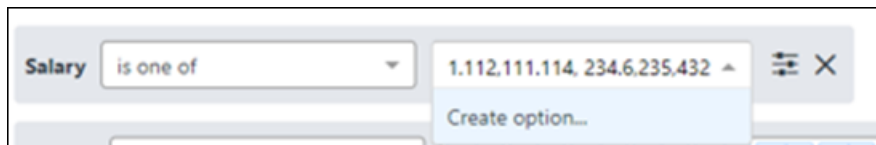
## Reporting 2.0 - Enhancement to Numeric Filter

Prior to this enhancement, the system did not allow users to paste comma separated values into a string filter with the "is one of" operator resulting in a lot of manual work by pasting individual values in the filter. This also prevents customers from migrating to Reporting 2.0 from custom reports.

With this enhancement, Reporting 2.0 now allows users to paste comma separated values into a numeric filter with the "is one of" operator. The system automatically separates each numeric value into a unique filter value. This aligns with the functionality available in Custom Reports.

This functionality is only available for numeric values.

Initially when pasting a string of comma separated values the user will see a list as in the image below



Upon pressing the enter key the system will separate each value. Any value can then be removed if required, and new entries can easily be manually added.



### How Does this Enhancement Benefit My Organization?

As pasting values opposed to manual entry is now possible users will save time and effort when working with comma separated values in numeric filters with the "is one of" operator. This is also likely to improve accuracy and therefore customers can have confidence in moving to Reporting 2.0.

### Considerations

Reporting 2.0 will ONLY allow dot(.) as a decimal separator in filter values irrespective of user culture, but it will display values based on user's culture separator. ex: for a French user, the filter will allow only "21.45" as filter value , but the result will display as "21,45". Please note that decimal values will only be accepted in the filter for the fields that allow decimal values like Salary and not for integer fields like Assignment ID.

### Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

## Reporting 2.0 - Excel Icon Added to Report Viewer

Prior to this enhancement, users wishing to export report data to Microsoft Excel after reviewing or editing filters and generating previews had to navigate from page to page to do so, making for a clunky user experience.

With this enhancement the following features are now available:

- A Microsoft Excel icon is added to the **Viewer** page after the clock icon.
- The Microsoft Excel icon is always available irrespective of whether the snapshot is available or not. It follows the behavior like that of the Reporting 2.0 Home Page.
- Using the icon, all users with the view or manage permissions can generate and download a new report snapshot with fresh data (as per the user's saved preferences for the report).
- If a user navigates away from or closes the window while the process is still in progress, the snapshot will still be completed and available in the snapshot pop-up behind the cloud icon. The excel output however will not be delivered as the session has been closed. In that case the user can still download the snapshot to MS Excel through the cloud snapshot pop-up.

### How Does this Enhancement Benefit My Organization?

Users can now execute a download to Microsoft Excel from the **Viewer** page. This enables them to carry out filter adjustments, refresh the data, and create the download all from the **Viewer** page.

### Implementation

Upon release, this enhancement is available for all portals with Reporting 2.0.



## Reporting 2.0 - Identify All Users a Report is Shared With

Prior to this enhancement, in Reporting 2.0 if a user wanted to see with whom a report is shared, they only see users who were selected via the **Share** flyout on the Reporting 2.0 home page or when editing the report in Report Builder. If users were able to access the report through folder sharing, they do not appear in the report share flyout.


Following this enhancement:

- Users can identify all shared users of a selected report on the report directly, regardless of the method used to share the report.
- A “Shared via Folder [Folder Name]” note appears in the Share flyout for the reports that are shared via folder.
- For users who received the report through folder sharing, no actions can be taken from this screen.
- This change will not have any impact on how reports are shown and the options available for users who receive the report through **Share Report**.


### Select Org Units

SEARCHSELECTED (1)

**Include Automation:** When checked, automation for report queueing will run on behalf of this user. This setting will not include subordinates. For this setting to take effect, the "Queue this report on a schedule" setting in the Automation Settings panel must be enabled. This setting can be enabled for up to 20 shared users.

**aguinaldo mayorga**  
Type: User ID: EMP000068 Username: aguim Status: Active Manager: Alicia Richman  
Organizational Unit(s): US Division (Division)  
☐ Include Subordinates ☐ Include Automation

Can View X

**Jeffrey Uang**  
Type: User ID: EMP000121 Username: juang Status: Active Manager: N/A  
Organizational Unit(s): Global Headquarters (Division)  
(Shared via folder "New Folder")

### How Does this Enhancement Benefit My Organization?

Users can easily identify all shared users of a specific report in one place, regardless of the method used to share the report

### Implementation

Upon implementation, this functionality is available in all portals with Reporting 2.0.

## Reporting 2.0 - Merge Summary Rows

Prior to this enhancement, in Reporting 2.0 customers did not have an option to merge their summarized data in a report and they had to manually adjust the output file as per their preference.

Following this enhancement:

- A new toggle *Merge Summary Rows* is added to the table properties in report builder
- When the toggle is ON, the output file will merge the matching rows in summarized columns. This is the default setting.
- When the toggle is OFF, summarized columns are populated in each row separately.
- The toggle is only be accessible if at least one column summary has been added.

### How Does This Enhancement Benefit My Organization?

Users now have an option to merge their summarized data in a report output

### Implementation

Upon implementation, this functionality is available in all portals with Reporting 2.0.

## Reporting 2.0 - New Summarization Toggle When Using "View as Hierarchy"

Prior to this enhancement, when summarizing by hierarchy and exporting a report to Microsoft Excel, Reporting 2.0 created a drill down summarized by the hierarchy in one column. Although this is the correct way to show hierarchy, it does not allow customers to leverage pivot tables and VLOOKUP to filter and share data with the appropriate teams.

With this enhancement, a toggle in table properties is introduced that allows customers to change the hierarchy in an Microsoft Excel output file to be shown in different columns.

- When this toggle is enabled, hierarchy summary shows all the levels of hierarchy in one column. This is the default setting.
- When this toggle is disabled, hierarchy summary shows the levels of hierarchy in individual columns.

**Note:** *The toggle impacts only the Microsoft Excel output format, all the other formats and the user interface will remain unaffected.*

### How Does this Enhancement Benefit My Organization?

Users can choose an approach to suit their reporting needs. This will be of particular interest to those who are required to pivot tables and use VLOOK for hierarchy data.

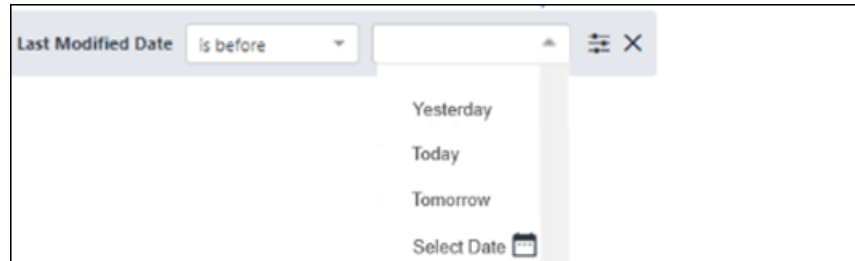
### Implementation

Upon release, this enhancement is available for all portals with Reporting 2.0.

## Reporting 2.0 - Relative Date Filters

Prior to this enhancement, there were no relative date filter values that could be used with a relative date as they always must be used with a specific calendar date. This applied to all date fields in Reporting 2.0. Due to this, reporting was not fully automated, and the user had to keep manually changing the date. For example, a user could not choose the option "[USER HIRE DATE] is before today" but must select "[USER HIRE DATE] is before 02/14/2022".

With this enhancement, a user can now select TODAY, YESTERDAY and TOMORROW for the relative date filters.



In the *Restrict Options* section, a new **Limit Date Select To** option is available. This option enables report builders to limit the date filter values. The available options are Yesterday, Today, Tomorrow, and Select Date.

Existing reports continue to work as-is with the following considerations:

- The existing operators "Yesterday", "Today" and "Tomorrow" are removed from the date filter list. Going forward users can now use "is on" "Yesterday", "is on" "Today" and "is on" "Tomorrow" respectively.
- In the *Restrict Options* section, the "Yesterday", "Today" and "Tomorrow" options are moved from the **Limit Operators To** filter to the **Limit Date Select To** filter.

Note the following:

- When selecting the "Is Between" operator range values can be either both specific calendar dates or both relative date values (Yesterday/Today/Tomorrow).
- If "Limit Date Select To" is set to "Select Date," the filter value opens the calendar.
- Relative date values can be selected in designer and viewer filter (but not filter properties) and will be saved to user preferences

### How Does this Enhancement Benefit My Organization?

Users can use relative date filters along with calendar date filters. This means that they do not have to adjust reports by manually adding the specific date in order to get the criteria they desire.

### Implementation

Upon release, this enhancement is available for all portals with Reporting 2.0.

## Updated Email Notification for All Email Delivery Reports

Prior to this enhancement, users with email delivery permissions received an automated email notification if they had scheduled the report snapshot and flagged the checkbox for **Notify me through email when the report is ready for download** or when the report was scheduled from Report builder. However, the notification content was lacking some helpful information.

With this enhancement, the email notification now includes the following information:

- Report generation details (who generated the report and when)
- Details about report source
- Report ID
- Instructions on how to use the link mentioned in email

**Note:** *The email notification content remains hard-coded and cannot be configured by users.*

### How Does This Enhancement Benefit My Organization?

Users have more clarity and an improved user experience as the email notification now has key information about the report.

### Implementation

The email notification is received when:

- A report is scheduled from the report snapshot and the box is checked to **Notify me through email when the report is ready for download**
- A report is scheduled from the Report builder

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

## Reporting 2.0 - View All Reports and Transfer Ownership

## Reporting 2.0 - View All Reports and Transfer Ownership

Reports are currently only visible to the report owner and those users with whom the report is shared. There was no way for anyone to view all reports that have been created within the portal. Administrators regularly request to be able to view all reports to support with troubleshooting and to help review and transfer report ownership when a user leaves the organization.

Following this enhancement:

- A new tool **Reporting 2.0 View and Manage All Reports** is created for administrators. Go to [ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > REPORTING 2.0 VIEW AND MANAGE ALL REPORTS](#).
- By default, the tool shows all reports in the portal owned by all users (Active or Inactive). It can be filtered by User ID.
- Administrators can select one or multiple reports to transfer report ownership to another user, the user whose ownership is transferred (if still active in the system) will be notified on successful transfer of ownership.

**Note:** *Delivery schedule will remain as-is even after the ownership is transferred*

**Note:** *Date and Time fields will be displayed in the time zone of the user accessing the feature*

**Note:** *Admin will see the success / failure message for report ownership transfer with a valid reason*

### How Does this Enhancement Benefit My Organization?

Administrators will have a new tool to view all reporting 2.0 report information and transfer report ownership

### Implementation

Upon implementation, this functionality is available in all portals with Reporting 2.0.

### Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Admin - All Reports	Grants ability to access the Reporting 2.0 View and Manage All Reports tool. This tool enables administrators to view all reports that have been created in Reporting 2.0. Administrators can also transfer ownership of these reports. This permission can be constrained by OU and User. The constraints on this permission refer to the Report Owner.	Reporting

## Reporting 2.0 - View and Manage All Reports Overview

The transfer ownership tool enables an administrator to view all current reports and to transfer the ownership of a report created in Reporting 2.0 to another user. This can be useful in the following circumstances:

- The report owner leaves the organization
- The report owner changes responsibilities

The Transfer ownership page can be accessed via [ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > REPORTING 2.0 VIEW AND MANAGE ALL REPORTS](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Admin - All Reports	Grants ability to access the Reporting 2.0 View and Manage All Reports tool. This tool enables administrators to view all reports that have been created in Reporting 2.0. Administrators can also transfer ownership of these reports. This permission can be constrained by OU and User. The constraints on this permission refer to the Report Owner.	Reporting

**Reporting 2.0 View and Manage All Reports**

This tool allows you to view all reports, to support with troubleshooting and to help review and transfer report ownership when a user leaves the organization. Please enter the User Ref (User ID) to view all reports owned by the user. In case the user is inactive, the reports will still be visible when searched for. By default the output of the page should show all reports in the portal owned by all the users. Please select the specific report or all reports if you want to transfer the report ownership to another user who has the relevant permissions and then click **Transfer Ownership** button.

UserRef

<input type="checkbox"/>	Report Title	ReportID	Create Date	Last Modified Date	Last Run Date	Shared	Scheduled	Owner	Owner Status	Owner Email
<input type="checkbox"/>	--Report Test	6159	04/04/2018 4:37:12 PM	10/07/2022 4:09:29 AM		Yes	Yes	ca	Active	sravanvadlamani@csod.com
<input type="checkbox"/>	--Test Report	6161	04/06/2018 5:24:25 PM	10/07/2022 4:11:58 AM		Yes	No	ca	Active	sravanvadlamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupid-1	6165	04/10/2018 5:46:29 PM	04/10/2018 5:46:29 PM	05/13/2019 5:46:28 PM	No	No	ca	Active	sravanvadlamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupid-2	6166	04/10/2018 5:47:08 PM	04/10/2018 5:47:08 PM	04/10/2018 5:47:23 PM	No	No	ca	Active	sravanvadlamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupid-3	6167	04/10/2018 5:47:32 PM	04/10/2018 5:47:32 PM	03/18/2019 4:12:11 PM	No	No	ca	Active	sravanvadlamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupid-4	6168	04/10/2018 5:47:50 PM	04/10/2018 5:47:50 PM	11/08/2021 10:15:58 PM	No	No	ca	Active	sravanvadlamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupid-5	6169	04/10/2018 5:48:00 PM	04/10/2018 5:48:00 PM	11/08/2021 10:21:27 PM	No	No	ca	Active	sravanvadlamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupid-6	6170	04/10/2018 5:48:00 PM	04/10/2018 5:48:00 PM	11/08/2021 10:21:27 PM	No	No	ca	Active	sravanvadlamani@csod.com

### View All Reports

The page is defaulted to show all reports in alphabetical order. The column view includes the following data about each report:

- Report Title



- Report ID
- Create Date
- Last Modified Date
- Last Run Date
- Shared
- Scheduled
- Owner
- Owner Status
- Owner Email

The columns are not sortable or filterable.

### **Search by User**

The search bar enables you to search by User Ref (Owner) to filter the list. The field is not case sensitive, however a full user id is required.

## Reporting 2.0 - Transfer Report Ownership

Reporting 2.0 allows for the transfer of ownership of reports from the existing owner to a new owner. This can be useful in the following circumstances:

- The report owner leaves the organization
- The report owner changes responsibilities

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Admin - All Reports	Grants ability to access the Reporting 2.0 View and Manage All Reports tool. This tool enables administrators to view all reports that have been created in Reporting 2.0. Administrators can also transfer ownership of these reports. This permission can be constrained by OU and User. The constraints on this permission refer to the Report Owner.	Reporting

To transfer ownership of a report, follow these instructions:

1. Navigate to [ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > REPORTING 2.0 VIEW AND MANAGE ALL REPORTS](#).
2. The table of reports is defaulted to show all reports. Enter the User Id of the current owner into the **User Ref** field, click **SEARCH**. The field is not case sensitive, however a full user id is required.
3. The list of reports is now filtered by the owner you searched by. Select the reports to transfer to a new owner by clicking the checkbox next to the report title. If you wish to select all the reports in the list you can use the check box in the title bar of the list. When reports are selected the **TRANSFER REPORT OWNERSHIP** button will light up.

## Reporting 2.0 View and Manage All Reports

This tool allows you to view all reports, to support with troubleshooting and to help review and transfer report ownership when a user leaves the organization.

Please enter the User Ref (User ID) to view all reports owned by the user. In case the user is inactive, the reports will still be visible when searched for. By default the output of the page should show all reports in the portal owned by all the users.

Please select the specific report or all reports if you want to transfer the report ownership to another user who has the relevant permissions and then click **Transfer Ownership** button.

UserRef

ca

SEARCH

<input type="checkbox"/>	Report Title	ReportID	Create Date	Last Modified Date	Last Run Date	Shared	Scheduled	Owner	Owner Status	Owner Email
<input checked="" type="checkbox"/>	--Report Test	6159	04/04/2018 4:37:12 PM	10/07/2022 4:09:29 AM		Yes	Yes	ca	Active	sravanvadiamani@csod.com
<input checked="" type="checkbox"/>	--Test Report	6161	04/06/2018 5:24:25 PM	10/07/2022 4:11:58 AM		Yes	No	ca	Active	sravanvadiamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupId-1	6165	04/10/2018 5:46:29 PM	04/10/2018 5:46:29 PM	05/13/2019 5:46:28 PM	No	No	ca	Active	sravanvadiamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupId-2	6166	04/10/2018 5:47:08 PM	04/10/2018 5:47:08 PM	04/10/2018 5:47:23 PM	No	No	ca	Active	sravanvadiamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupId-3	6167	04/10/2018 5:47:32 PM	04/10/2018 5:47:32 PM	03/18/2019 4:12:11 PM	No	No	ca	Active	sravanvadiamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupId-4	6168	04/10/2018 5:47:50 PM	04/10/2018 5:47:50 PM	11/08/2021 10:15:58 PM	No	No	ca	Active	sravanvadiamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupId-5	6169	04/10/2018 5:48:00 PM	04/10/2018 5:48:00 PM	11/08/2021 10:21:27 PM	No	No	ca	Active	sravanvadiamani@csod.com
<input type="checkbox"/>	VerifyColumnMetaData-UiGroupId-6	6170	04/10/2018 5:48:00 PM	04/10/2018 5:48:00 PM	11/08/2021 10:21:27 PM	No	No	ca	Active	sravanvadiamani@csod.com

CANCEL

TRANSFER REPORT OWNERSHIP

- Click the **TRANSFER REPORT OWNERSHIP** button. An overlay page will be displayed with a summary of the reports selected for transfer.

If you are not happy with the selection **CANCEL** out of the process to return to the previous page. If you wish to start your selection again, clear your search criteria.

- When you are happy with selection shown in the summary overlay page enter the User Ref of the new owner into the **Transfer Report(s) Ownership** to field. The field is not case sensitive, however a full user id is required.
- Click the **SUBMIT** button. A confirmation message is displayed. From the confirmation message you can either cancel out of the process or proceed.

Canceling will return you to the summary page. The proceed option will carry out the transfer ownership action. You will receive a success message on the screen if the action was completed. If it was not possible to transfer ownership you will be shown the summary screen with an error message and you will be able to enter a new user id to attempt the process again.

**Note:** Delivery schedule will remain as-is even after the ownership is transferred

**Note:** Date and Time fields will be displayed in the time zone of the user accessing the feature

## RTDW Updates to OData v4.0 Delta Objects

Impacting only customers using Data Exporter API. New objects will be added that support the OData v4.0 Delta/Change Tracking capabilities for Data Exporter API, initially released in August '22. A consolidated [list of Data Exporter API objects that currently support OData Delta/Change Tracking](#) is maintained in the RTDW Documentation Community. Join and follow the community to be notified of new objects with Delta support.

## **OData 4.0 Change Tracking Objects for the November '22 Release**

- transcript\_core
- user\_ou\_core
- user\_ou\_multi\_core
- users\_core

## **RTDW Updates to Reporting API, RDW, and Data Exporter**

Impacting only customers using Reporting API, Replicated Data Warehouse (RDW), Data Exporter API, and Data Exporter, the Real-Time Data Warehouse (RTDW) categories may be impacted, deprecated, or break applications, scripts, or functionalities that are based on earlier versions of RTDW objects.

Documentation that describes RTDW views and fields used in Custom Reports will be updated for the November '22 Release and available in the [RTDW Documentation for Reporting API, RDW, and Data Exporter Community](#). Join and follow the community to be notified of new posts.

For customers using Reporting API, Replicated Data Warehouse (RDW), Data Exporter API, or Data Exporter, the changes and deprecated objects will be reflected in stage as of October 18 and in production with the release on November 4.

For customers using Data Exporter, new objects and replacements for deprecated objects are not automatically added to your export, they must be requested via a case to Global Customer Support. Replacement objects are made available to customers six months prior to their deletion.

### **Data Exporter - Deprecated Objects Scheduled for November '22 Release**

There are no new or deprecated objects for the November '22 Release.

### **RTDW - Deprecated Objects Scheduled for November '22 Release**

There are no new or deprecated objects for the November '22 Release.

# Cornerstone HR

## "Compensation Type" Added to "User Audit Report - Detailed" Standard Report

Prior to this enhancement, customers using Employee Compensation were unable to report on the history of compensation modifications, including relevant contexts, such as Compensation Type.

With this enhancement, the Compensation Type field is added to the "User Audit Report - Detailed" standard report as a column in the report output.

### Implementation

Enabled by default for customers using Compensation and have compensation auditing enabled in their portal.

### Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.



## Deprecation of the "User Record as of a Date" Standard Report in 2023 Q1

The "User Record as of a Date" Standard Report will be deprecated in the first quarter of 2023.

As an alternative, customers with Cornerstone HR enabled in their portal and using the effective dating feature or the aggregate audit feature, can use the "Point-in-time Headcount Details" report. This report provides a list of user records for a specific date at any point in time.

Customers who do not have Cornerstone HR enabled can use Reporting 2.0 instead.

**Note:** *For customers who do not use Cornerstone HR, this report did not respect any past/future point in time relations/data values. Generated results were based on an "as of now" dataset which is why Reporting 2.0 is a viable alternative.*

# Learning

## Curriculum Player 2.0 (Open Beta)

Cornerstone is excited to announce an Open Beta in Stage environments for Curriculum Player 2.0. With the Curriculum Player 2.0 experience, learners can view the curriculum contents in a side panel while viewing content through an inline player. This updated approach allows learners to keep track of their curriculum progress while simultaneously completing content.

The November '22 Release is the first milestone for Curriculum Player 2.0. Cornerstone will continue building out the full feature set in future releases.

The following features are included with the November '22 Open Beta:

- Curriculum Header
  - Curriculum title & description
  - Curriculum progress percentage
  - Curriculum due date
  - Total duration
  - Version
  - Options menu to View Training Details
- Inline Content Player
  - Ability to view content inline for online courses, videos, material PDFs
  - Child training title
  - Child training description
  - Child training transcript status
  - Child training type
  - Due date
  - Training hours
  - Version
  - Call to actions relevant to training type and transcript status
- Other
  - Child training table of contents panel
  - Icons, buttons, and highlighted areas will respect the theme colors set in Display Preferences

For this Open Beta, the Curriculum Player 2.0 launches the new player when the following conditions are met. Otherwise, the legacy curriculum player launches when these conditions are not met:

- The curriculum does not use sections.
- The curriculum only contains online courses, videos, or materials. Other training types will be supported in a future release.
- There is a maximum of 10 training items within the curriculum.

Curriculum Player Redesign

Options

Curriculum description goes here. Curriculum description goes here. Curriculum description goes here.

=%	Due date	Total duration	Price	Version
<div></div>	25/12/2022	8h 33m	\$ 00.00	1.45.9

Curriculum associated Skills

Skill 1
Skill 2

### Trainings

Better Time Management 1

Status: To be started

Due: No due Date

Better Time Management 1

Mark Complete

Video description

Status: In Progress

Training type: Video

Due: 7/31/2022

Duration: 7 hours

Price: -

Version: 1

## How Does this Enhancement Benefit My Organization?

This enhancement provides an enhanced user interface and user experience that allows for a seamless way to track and complete curriculum trainings.

## Implementation

This functionality is disabled for all organizations. The Curriculum Player 2.0 can be self-enabled by going to [ADMIN TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#).

This functionality is only available in Stage environments.

## **End of Support of the "Library" Training Type with the November '22 Release**

The Library training type is being deprecated with End-of-Support occurring with the November '22 Release.

The Library training type is a legacy training type which is seldom used today, having largely been replaced in popularity and usage by the more flexible Curriculum and Playlist training types.

### **Deprecation Milestones:**

- Milestone 1 (August 2022): August '22 Release initial deprecation announcement
- Milestone 2 (August-November 2022): Transition Libraries to Curricula or Playlists
- Milestone 3 (November 2022): End-of Support
- Milestone 4 (2023): Library training type full deprecation

### **Starter Guide**

**[Click here to access the Library Training Type Deprecation Guide!](#)**

## Learning - Accessibility Enhancements

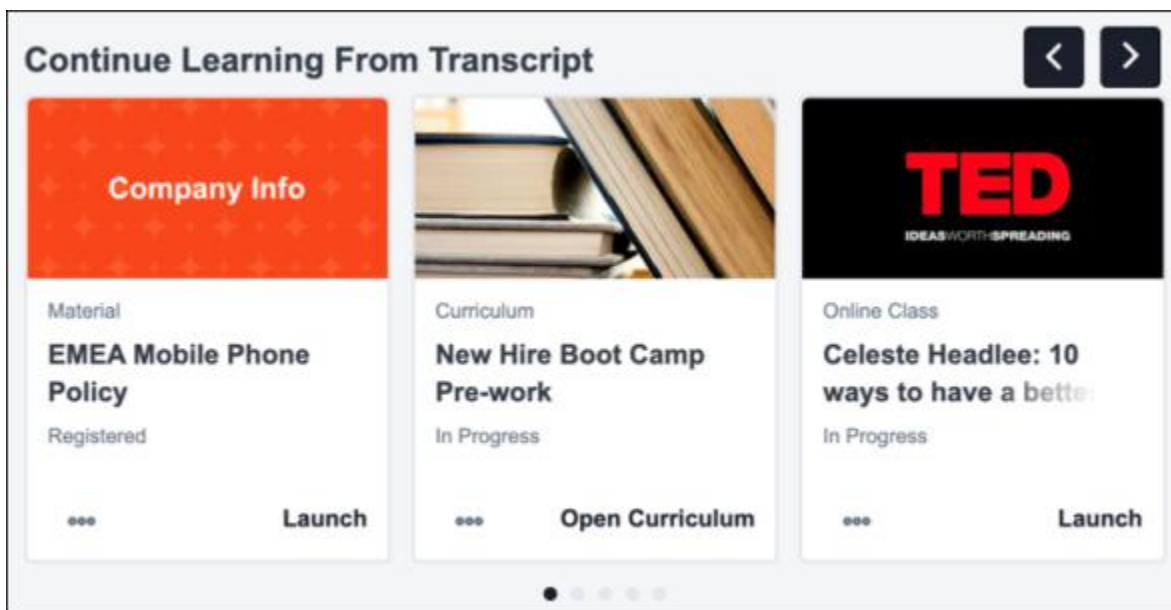
The following accessibility enhancements are included with the November '22 Release:

- Learner Home: Carousels are updated so that the controls do not cover content on the screen and carousel content is more easily viewed when zoomed.
- Transcripts: A label for "Type" is added to each object on the transcript so that images are not relied upon, and screen readers can more accurately convey the training type to users.
- Connect Topics: Alt text can be added to attachments and links so they will be more descriptive for screen readers. **This functionality is targeted for 2023 Q1.**

### Learner Home

Previously, to navigate forward and backward within a carousel, the forward and back arrows appeared within the training tile. This would sometimes cover content and the screen.

With this enhancement, the forward and back arrows are moved to the upper-right corner of the carousel. This ensures the arrows do not cover content on the training tiles. In addition, the pagination indicator is moved from the upper-right corner of the carousel to centered below the carousel. Lastly, the carousel content is now more easily viewed when zoomed, ensuring content is not inappropriately cropped or truncated.



### Transcript

Prior to this enhancement, learning objects had an icon to indicate the training type, but there was no text or key to specify the training type. A tooltip was displayed when hovering over the image, but this was not displayed or indicated on keyboard focus.

With this enhancement, a new Training Type label is added to each training item on the transcript so that images are not relied upon, and screen readers can more accurately convey the training type to users.

Filter by Training Status

Sort by

Filter by Training Type

Search by Keyword

Active


Date Added

All Types

Search

Search Results (135)

☐ Hide Certified Certifications



LMS-102301

Due : No Due Date   Status : In Progress   Training Type : Online Course

Launch

## Connect Topics

With this enhancement, users can now provide additional information for links or attachments within Connect posts and post replies. This provides content for screen readers to convey descriptive information about the link or attachment.

This functionality is targeted for 2023 Q1.

## How Does this Enhancement Benefit My Organization?

Supporting all users is important to Cornerstone. Improving accessibility allows all users to access and use the platform.

## Implementation

This functionality is automatically enabled for all organizations. The Learner Home and Connect Topics enhancements are not available at the start of UAT.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	<p>Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open.</p> <p>On the Learner Home page, this permission also allows end users to view the <b>Completions &amp; Hours</b> field, the training sidebar, and the Continue Learning carousel.</p> <p>This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports,</p>	Universal Profile

	User Self and Subordinates, and User. <b>Note:</b> <i>For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.</i>	
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
View Transcript Item	Grants ability to view details of learning objects that appear on the transcript (training record), by clicking on the name of the learning object. Users must also have the Bio About - View permission in order to access the transcript within Universal Profile. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, or User's Self. This is an end user permission.	Learning - Administration



## Learning Assignment Tool Guardrail Override Process

## Learning Assignment Tool Guardrail Override Process

This enhancement provides the ability for organizations to enable a guardrail that can prevent the over-assignment of training when new standard, dynamic, or dynamic recurring learning assignments are created, or existing draft learning assignments are edited. This enhancement also provides the ability for administrators with elevated permissions to review and submit learning assignments on behalf of other administrators and delete saved drafts created by themselves or others.

With this enhancement, if the **High User Count** threshold is set and the **Restrict Submission** toggle is enabled in Learning Assignment Preferences, the following rules are enforced:

- Administrators with the *Assignment Tool - Submit Draft* permission can create and submit their own learning assignments that exceed the High User Count setting.
- Administrators who do not have the *Assignment Tool - Submit Draft* permission can only save the learning assignment as a draft or cancel the assignment if it exceeds the threshold.
- Administrators with the *Assignment Tool - Submit Draft* permission and the *Assignment Tool - View all Drafts* permission can review, edit, and submit any assignments that are exceeding the High User Count threshold.

### How Does this Enhancement Benefit My Organization?

This enhancement puts checks in place to lower the likelihood of erroneously assigning training to the wrong audience which can have a significant impact in terms of time and cost to fix if this involves a large number of incorrect assignees.

### Considerations

- Existing dynamic learning assignments that were previously submitted are not supported by this enhancement.
- Administrators without the *Assignment Tool - Delete Draft* permission cannot delete their own drafts.
- The Low User Count warning is not impacted by these new settings or permissions.

### Implementation

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

To setup the override process, both the existing High User Count threshold and new Restrict Submission preference must be enabled in Assignment Tool Preferences. These are global settings. [See \*\*Assignment Tool Preferences - High User Count Warning\*\* on page 147 for additional information.](#)

Access to view drafts created by others is controlled by the new *Assignment Tool - View All Drafts* permission.

Access to edit and submit drafts created by others, or any draft that exceeds the high user count threshold, is controlled by the *Assignment Tool - Submit Draft* permission.

Ability to delete any draft is controlled by the new *Assignment Tool - Delete Draft* permission.

Enable the new LAT Draft Review email in Email Administration and select “Draft Reviewers” as recipients to notify override administrators that a learning assignment needs reviewing.

### Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Delete Draft	<p>Grants ability to delete any draft learning assignment. This includes drafts that were submitted for override, drafts created by self, or any other unneeded drafts created by other administrators. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only delete drafts that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration
Assignment Tool - Submit Draft	<p>Grants ability to create and submit a learning assignment that exceeds the High User Count threshold even if the Restrict Submission toggle is enabled in Assignment Tool Preferences. Administrators with this permission can also resume and submit a draft learning assignment that was created by another administrator that exceeded the High User Count threshold. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only submit learning assignments that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration
Assignment Tool - View all Drafts	<p>Grants ability to view any learning assignment draft. This includes both drafts that need an override and drafts created by other administrators. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only view drafts that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
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	Grants ability to create Standard (one-time) 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	Learning - Administration

	they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	
Assignment Tool Preferences	Grants access to Assignment Tool Preferences where an administrator can activate the new Assignment Tool and configure the processing options and settings to create Learning Assignments. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Proxy Enrollment for Certification - Create Dynamic	Grants administrator ability to create dynamic proxy enrollments for certifications. This is an administrator permission.	Learning - Administration
Proxy Enrollment for Certification - Create Standard	Grants administrator ability to create standard proxy enrollments for certifications. This is an administrator permission.	Learning - Administration

## Security Roles

Upon release, the new *Assignment Tool - Delete Draft*, *Assignment Tool - Submit Draft*, and *Assignment Tool - View All Drafts* permissions are automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

## Assignment Tool Preferences - High User Count Warning

With this enhancement, a new **Restrict Submission** setting is available in the *High User Count Warning* section of Assignment Tool Preferences.

To access the Assignment Preferences page, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > ASSIGNMENT TOOL PREFERENCES](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool Preferences	Grants access to Assignment Tool Preferences where an administrator can activate the new Assignment Tool and configure the processing options and settings to create Learning Assignments. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

### Assignment Tool Preferences

Use these preferences to configure default settings for newly created Assignments.

#### Dynamic Re-assignment Options

Set the default Dynamic Re-assignment processing settings for all newly created Assignments. These settings can be modified from the Assignment Summary page.

☐ Enable Dynamic Re-assignment

#### High User Count Warning

Set the threshold that will trigger the High User Count warning to appear when submitting a new Learning Assignment.

Display warning when  **Users** or more of the active users in the portal have been selected for an Assignment.

☒ **Restrict Submission**

The High User Count restriction will appear when selecting user criteria and when submitting a new Learning Assignment. Only the users who have the relevant permission and constraints will be able to submit the Learning Assignment that meets or exceeds the high user count specified.

#### Prerequisite Options

Set the default prerequisite preferences for all Learning Assignments. This setting will only impact new assignments.

☒ Enforce prerequisites. When enabled, users not satisfying training prerequisites will not receive the associated training.

## **Restrict Submission**

When this option is enabled, only administrators who have the *Assignment Tool - Submit Draft* permission can submit a learning assignment if it exceeds the High User Count threshold. If an administrator who does not have one of these permissions creates an assignment that exceeds the High User Count threshold, the administrator can save their assignment as a draft, but they cannot submit the assignment for processing. A draft assignment must be reviewed and approved by an administrator who has permission to submit draft assignments.

When this option is not enabled, then any learning assignment that exceeds the High User Count threshold will trigger a warning, but the assignment can still be submitted.

## Create Learning Assignment - High User Count

When creating a learning assignment that exceeds the High User Count threshold set in Assignment Tool Preferences, the warning behavior depends on the administrator's permissions and whether the Restrict Submission toggle is enabled in Assignment Tool Preferences.

The *Assignment Tool - Submit Draft* permission gives administrators permission to submit a learning assignment that exceeds the High User Count threshold regardless of whether the Restrict Submission toggle is enabled.

To begin creating a new learning assignment, go to [ADMIN > TOOLS > LEARNING](#) and click the **Assignment Tool** link. From the Manage Learning Assignments page, click the **CREATE ASSIGNMENT** button.

### Permissions

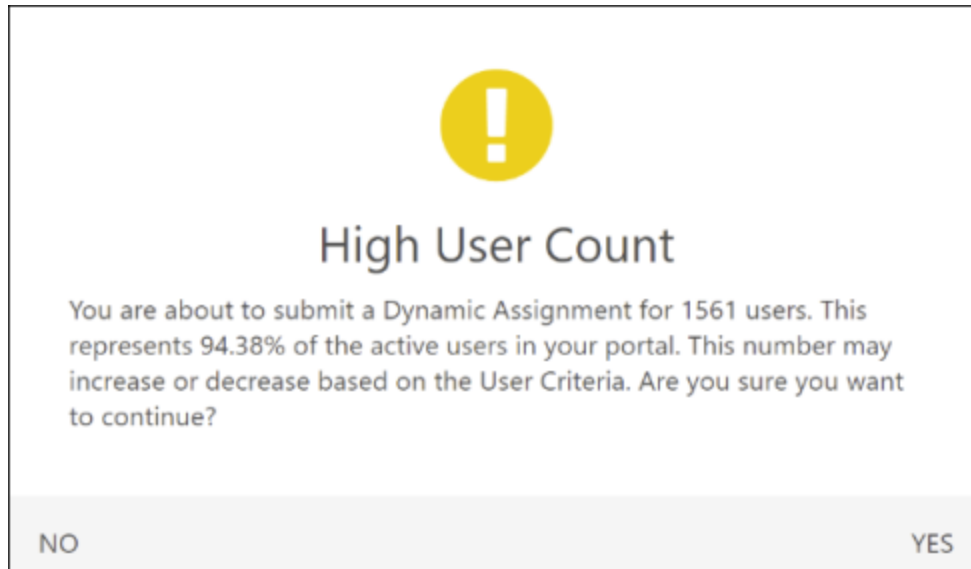
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Standard and Dynamic - Recurrence	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. Also grants ability to enable/disable Recurrence when creating a Dynamic 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
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	Learning - Administration



	by users within the constraints. This is an administrator permission.	
Assignment Tool - Standard	Grants ability to create Standard (one-time) 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 - Submit Draft	Grants ability to create and submit a learning assignment that exceeds the High User Count threshold even if the Restrict Submission toggle is enabled in Assignment Tool Preferences. Administrators with this permission can also resume and submit a draft learning assignment that was created by another administrator that exceeded the High User Count threshold. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.  Administrators can only submit learning assignments that were created by administrators who are within the constraints on this permission.	Learning - Administration

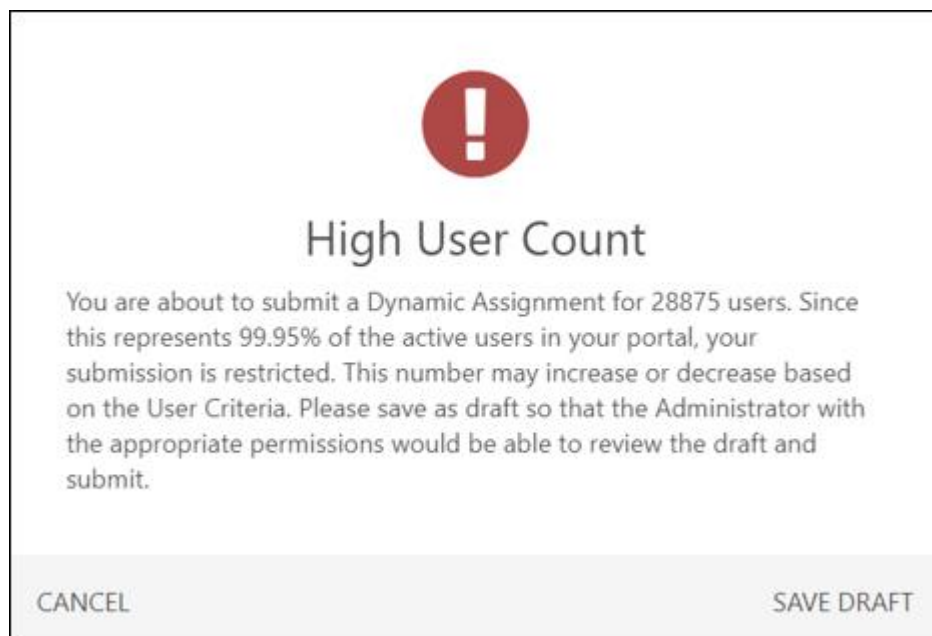
### **Administrator Has Submit Draft Permission**

Administrators who have the *Assignment Tool - Submit Draft* permission can submit a learning assignment that exceeds the High User Count threshold regardless of whether the Restrict Submission toggle is enabled. These administrators will receive the High User Count warning, and they will be given the option to submit the learning assignment with the high user count.



### Administrator Does Not Have Submit Draft Permission

If the Restrict Submission toggle is enabled, administrators who do not have the *Assignment Tool - Submit Draft* permission cannot submit a learning assignment that exceeds the High User Count threshold. These administrators will receive the High User Count warning, and they will be given the option to save the learning assignment as a draft.



If the Restrict Submission toggle is not enabled, administrators can submit a learning assignment that exceeds the High User Count threshold regardless of whether they have the *Assignment Tool - Submit Draft* permission. These administrators will receive the High User Count warning, and they will be given the option to submit the learning assignment with the high user count.



## High User Count

You are about to submit a Dynamic Assignment for 1561 users. This represents 94.38% of the active users in your portal. This number may increase or decrease based on the User Criteria. Are you sure you want to continue?

NO

YES

## Learning Assignment Summary - Modification History

With the introduction of draft learning assignments, the Modification History on the Learning Assignment Summary page is updated to display and track when the learning assignment is created as a draft and submitted for processing.

When a draft assignment is created, this is tracked as a Created Draft.

When a draft assignment is submitted for processing, this is tracked as a Submitted Draft.

Modification History	7 Modifications
Modified by Debbie Tatu (dtatu) on 8/30/2022 12:32:10 PM. Re-assign Latest Version Disabled. Modified by Debbie Tatu (dtatu) on 8/30/2022 12:32:10 PM. Dynamic Re-Assignment Disabled. Modified by Debbie Tatu (dtatu) on 8/30/2022 12:32:10 PM. Remove Child Trainings Disabled. Modified by Debbie Tatu (dtatu) on 8/30/2022 12:32:10 PM. Remove In Progress Training Disabled. Modified by Debbie Tatu (dtatu) on 8/30/2022 12:32:10 PM. Dynamic Removal Disabled. Submitted by Debbie Tatu (dtatu) on 8/30/2022 12:32:10 PM. Submitted Draft. Created by Calista Wayfer (calwayfer) on 8/29/2022 3:59:00 PM. Created Draft.	

To access the Assignment Summary page for a learning assignment, go to [ADMIN > TOOLS > LEARNING > LEARNING ASSIGNMENT TOOL](#) and click on the title of the learning assignment for which you want to view the Assignment Summary page.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
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	Learning - Administration

	<p>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.</p>	
Assignment Tool - Standard	<p>Grants ability to create Standard (one-time) 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.</p>	Learning - Administration

## Manage Learning Assignments - Draft Creator

With the introduction of draft learning assignments, administrators can now view and search by draft creator on the Manage Learning Assignments page.

The following enhancements have been made to the Manage Learning Assignments page:

- The Created By search filter now allows administrators to search for learning assignments by the draft creator.
- Draft Created By is now displayed as an informational item in the learning assignment details.

**Material Test1**  
Assignment ID : 2962   Type : Standard   Status : Processed   Created Date : 9/6/2022 7:33 AM   Created By : aishwarya mantri   **Draft Created By : Cornerstone**   User Criteria   5 Training

To access the Manage Learning Assignments page, go to [ADMIN > TOOLS > LEARNING](#) and click the **Assignment Tool** link.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
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,	Learning - Administration

	<p>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.</p>	
Assignment Tool - Standard	<p>Grants ability to create Standard (one-time) 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.</p>	Learning - Administration

## Manage Learning Assignments - New Status Filters

With the introduction of draft learning assignments and draft reviews, there are new Status filter options on the Manage Learning Assignments page.

The new Status filter options are available to help administrators more easily identify their own drafts and drafts needing review:

To access the Manage Learning Assignments page, go to [ADMIN > TOOLS > LEARNING](#) and click the **Assignment Tool** link.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
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

Grants ability to create Standard (one-time) 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

### Manage Learning Assignments

Create AssignmentOptions

Search by Assignment Title or Assignment ID

FilterSort by Created Date (Newest-Oldest)

Training Title

Enter Training Title

Created By

Enter First Name and/or Last Name

Course Code

Enter Course Code

Created Date

Last 120 Days

From 6/8/2022

To 10/6/2022

Type \*

2 Selected

Status \*

8 Selected

All Statuses

Processed

Queued

Cancelled

Active

Inactive

My Drafts

Drafts in Review

All Drafts

Recurrence \*

2 Selected

User Criteria

Select Users

All Users

Created with

Source \*

ol

Reset Filters

Apply Filters

LAT123 (Copy)

Assignment ID : 3087

Type : Standard

Status : Q

2022 10:22 AM

Created By : Mugdha Deuskar

User Criteria



1

Training

## Manage Learning Assignments - New Indicators

With the introduction of draft learning assignments and draft reviews, there are new visual indicators on the Manage Learning Assignments page for assignments that are in Draft status.

The following new indicators are available to help administrators more easily identify their own drafts and drafts needing review:

- Review Required  - This icon indicates that the draft learning assignment must be reviewed before submission.
- My Draft  - This icon indicates that the draft learning assignment was created by the administrator who is viewing the page.

To access the Manage Learning Assignments page, go to [ADMIN > TOOLS > LEARNING](#) and click the **Assignment Tool** link.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
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	Learning - Administration

	they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	
Assignment Tool - Standard	Grants ability to create Standard (one-time) 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

## Manage Learning Assignments - Resume Draft

With the introduction of draft learning assignments, administrators with the *Assignment Tool - View all Drafts* permission can view all draft assignments that were created by administrators who are within their permission constraints. The administrator can only resume an assignment that they created.

If the administrator also has the *Assignment Tool - Submit Draft* permission, then the administrator can resume and submit any draft assignment that was created by administrators who are within their permission constraints, even if it exceeds the High User Count threshold.

To access the Manage Learning Assignments page, go to [ADMIN > TOOLS > LEARNING](#) and click the **Assignment Tool** link.

To resume a draft assignment, select the menu icon to the right of the assignment. Then, select the **Resume Draft** option.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
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,	Learning - Administration

	<p>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.</p>	
Assignment Tool - Standard	<p>Grants ability to create Standard (one-time) 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.</p>	Learning - Administration
Assignment Tool - Submit Draft	<p>Grants ability to create and submit a learning assignment that exceeds the High User Count threshold even if the Restrict Submission toggle is enabled in Assignment Tool Preferences. Administrators with this permission can also resume and submit a draft learning assignment that was created by another administrator that exceeded the High User Count threshold. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only submit learning assignments that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration
Assignment Tool - View all Drafts	<p>Grants ability to view any learning assignment draft. This includes both drafts that need an override and drafts created by other administrators. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only view drafts that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration

## Manage Learning Assignments - Delete Draft

With the introduction of draft learning assignments, administrators with the *Assignment Tool - Delete Draft* permission can delete a draft assignment. Administrators with this permission can only delete drafts that were created by administrators who are within their permission constraints. Administrators must also have this permission to delete their own draft assignments.

To access the Manage Learning Assignments page, go to [ADMIN > TOOLS > LEARNING](#) and click the **Assignment Tool** link.

To delete a draft assignment, select the menu icon to the right of the assignment. Then, select the **Delete Draft** option.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Delete Draft	<p>Grants ability to delete any draft learning assignment. This includes drafts that were submitted for override, drafts created by self, or any other unneeded drafts created by other administrators. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.</p> <p>Administrators can only delete drafts that were created by administrators who are within the constraints on this permission.</p>	Learning - Administration
Assignment Tool - Standard and Dynamic - Recurrence	<p>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.</p>	Learning - Administration

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	Grants ability to create Standard (one-time) 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

## New Email Trigger - LAT Draft Review

A new email trigger, LAT Draft Review, is now available. This email is triggered when a learning assignment draft is created, and the following are true:

- The High User Count threshold is exceeded
- The Restrict Submission setting is enabled
- The administrator who created the draft does not have permission to submit the draft

This email is triggered an additional time if an administrator edits and saves the same draft if all of the criteria are still true.

Example 1: Administrator A creates a draft assignment with a user count that is above the High User Count threshold, but the Restrict Submission setting is disabled. The email is not triggered.

Example 2: Administrator A attempts to create a learning assignment that exceeds the High User Count threshold, and the Restrict Submission setting is enabled. Administrator A does not have permission to submit draft assignments. Administrator A receives the High User Count restriction and the can only save the assignment as a draft, and this triggers the LAT Draft Review email.

This email can be configured to be sent to Draft Reviewers or specific users. When this email is sent to Draft Reviewers, this includes all administrators who have the *Assignment Tool - Submit Draft* permission regardless of permission constraints. Administrators may further restrict the recipient list by adding specific users or by restricting with availability.

To access Email Administration, go to [ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT](#).

### Permissions

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

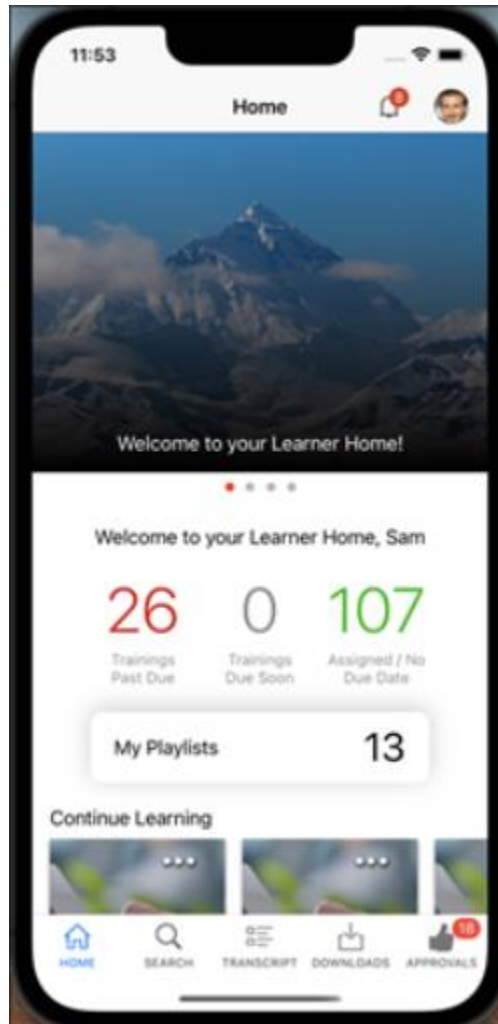


## Learn App - Notification Center

This functionality is not available during UAT.

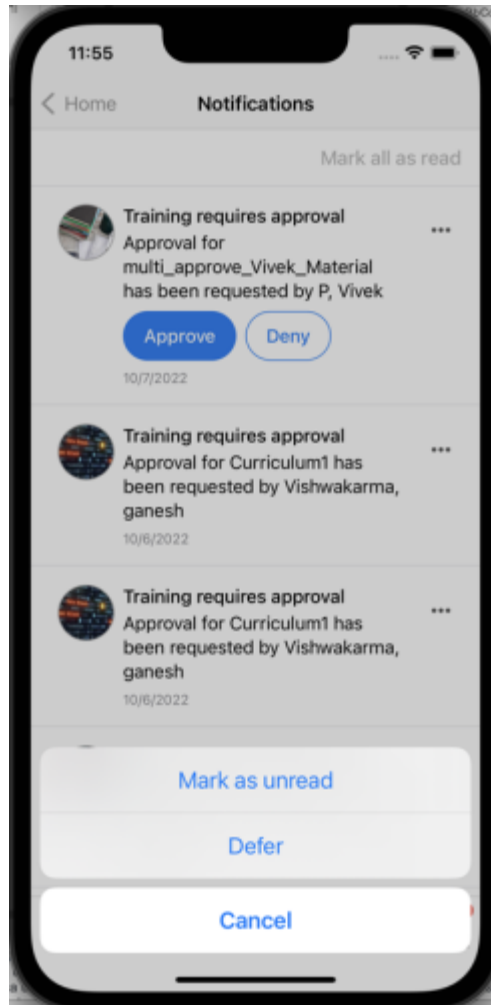
Prior to this enhancement, users were unable to easily access and manage current and previous notifications from a single location.

With this enhancement, Cornerstone introduces the Notification Center for the Learn App. By selecting the bell icon on a device's home screen, the Notification List screen opens to display all received and unattended notifications. Selecting any notification in the list opens its details.



The Notification Center also provides the following:

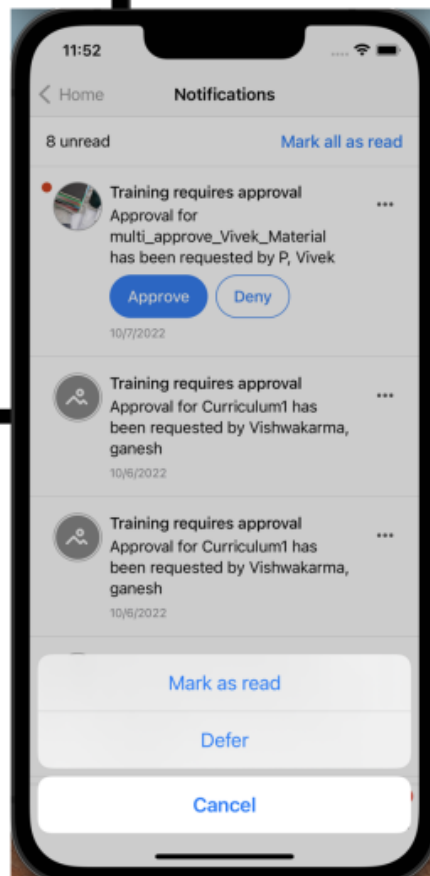
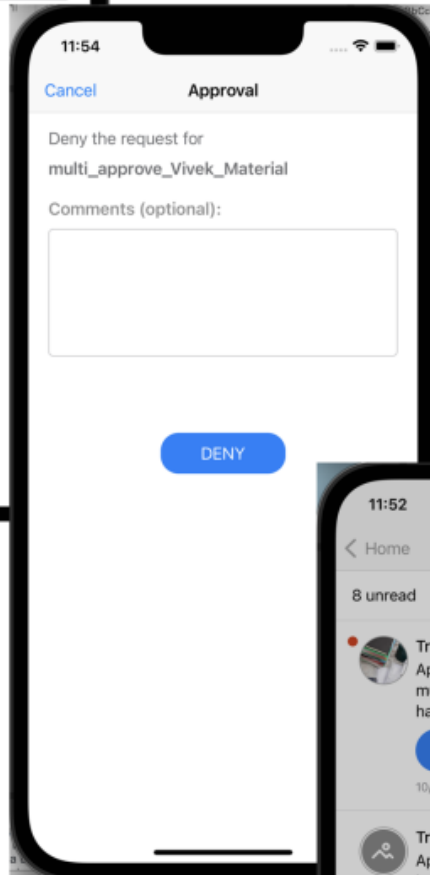
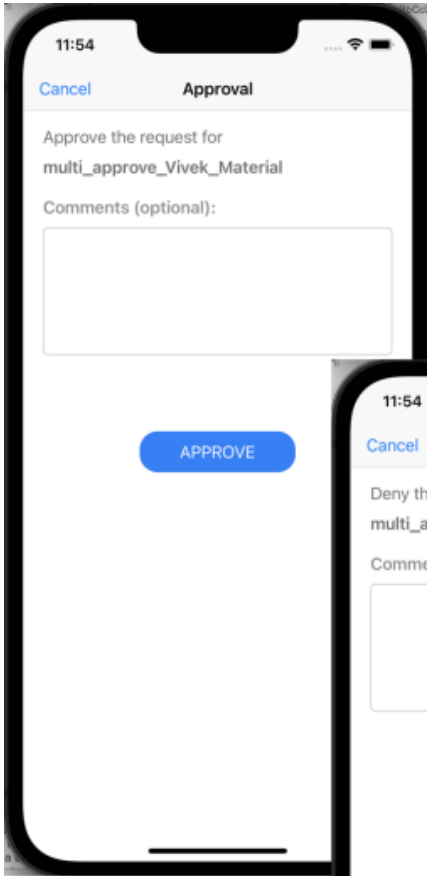
- An unread notification count in the top bar
- A red dot that indicates unread notifications
- A "Mark all as read" option
- For each notification, an option to mark the specific message read or unread



The learner can enable and disable the DND setting for push notifications in the Learn App settings.

Additionally, managers can use the Notification Center to:

- Approve, reject, and defer training
- Add approval comments



## How Does this Enhancement Benefit My Organization?

The Notification Center helps manage all push notifications and categories them according to type and event.

### Considerations

- Push notification support is limited to the five currently supported notifications:
  - Training is Approved
  - Training is Assigned
  - Training is Denied
  - Training Has Due Date
  - Training is Requested
- If more than one user is logged into the app, notifications are not be received and the count is not updated.

### Implementation

- On by default in versions of the app available after the November '22 Release. If the apps on a user's device are configured to auto-update, no action is required from the user to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from either the Apple store or the Google Play store.

## **New User Interface on the Manage Events and Sessions Pages**

## New User Interface on the Manage Events and Sessions Pages

The Manage Events and Sessions pages, “View All Events” and “View All Sessions,” were updated in Stage environments during the August '22 Release with a fresh new look to enhance the daily experience for administrators and instructors who often need to visit these pages to maintain classroom and virtual training events and sessions for their organization.

With the November '22 Release, this new user interface is now available for Production and Pilot environments. This enhancement is available to test now in the Stage environment with additional fixes available to test during User Acceptance Testing (UAT).

Most subsequent screens, such as the Waitlists page are not yet updated. Please see UI Modifications and Enhancements for other pages newly updated with the November '22 Release. [See UI Modifications and Enhancements - November 2022](#) on page 189 *for additional information*.

### How Does this Enhancement Benefit My Organization?

This enhancement provides a modernized look and feel for the Manage Events and Sessions pages.

While we are confident that most of our customers will see tremendous value in the new enhancements, we also understand that accelerating the pace of innovation means trying new things. And that means changes we make to our products won't always work for everyone.

To that end, we are releasing our new UI/UX enhancements in Early Adopter mode, and have built guardrails into this release that enable you to maximize value and minimize risk:

**We encourage you to take a test drive first:** While we're confident that most of you will find great value in the new UI/UX features, you can make sure they're right for your team by taking a test drive in STAGE before implementing them in production. The enhancements are automatically enabled in Stage environments for all organizations and can be disabled via the Learning Feature Activation Preferences page (Admin Tools > Learning > Learning Preferences > Feature Activation > User Interface Modifications).

**It is your choice to turn on (or off) these new features:** You can choose to introduce these new features in production via the Learning Feature Activation Preferences. If there ever comes a time that you want to turn off these features and revert to your prior experience in Production or Stage, you can do so by disabling.

**Your feedback is key:** We have been receiving customer and have incorporated much of it into this release. As you test and introduce new enhancements to your teams, we want to hear from you! Your input and feedback will help us continue to deliver what you need for your teams and organizations. [Please share your feedback with us in Validation Station](#).

### Frequently Asked Questions (FAQs)

[Does one preference govern all areas that have received an update?](#)

Yes. The Feature Enablement preference is used to access the updated user interfaces across the application.

[Can I enable or disable the preference at any time?](#)

Yes. The preference is a toggle that can be used to change whether the portal uses the updated interface or the legacy interface. However, the user must log out, then log in for the change to take effect.

#### Will Cornerstone be updating other features in the future?

Yes. Based on usage analytics and updated priorities, Cornerstone will continue to update other areas of the application in future releases.

#### How does customization and branding work with the updated designs?

Any customer with a custom theme and logo set in Display Preferences should expect their portal to work normally with this update. However, certain customers utilizing custom code or branding, such as Google Tag Manager, cannot utilize the new designs at this time.

#### Consideration

- These updates to the user interface of the Manage Events and Sessions pages are purely cosmetic. There is no change to the behavior of events, sessions, or the options to manage these training types.
- Both Enhanced Search and Traditional Search can be used on the Manage Events and Sessions page.
- The new pages are not mobile-responsive.

#### Implementation

This functionality is automatically enabled in Stage environments for all organizations. However, this functionality can be disabled in Stage environments.

Self-activation is available in Pilot and Production environments with the November '22 Release by going to [ADMIN TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES > USER INTERFACE MODIFICATIONS](#).

#### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Learning Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new	Learning - Administration

	features associated with Learning, Connect and Extended Enterprise.	
Sessions - View	<p>Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration



## View Events and View Sessions - New UI

The new user interface for the View Events and View Sessions pages is available for self-activation in Stage environments by going to [ADMIN TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES > USER INTERFACE MODIFICATIONS](#).

Self-activation will be available in Pilot and Production environments with the November '22 Release.

### Manage Events & Session Page

#### Manage Events & Sessions

Event are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule new sessions. Note that the search will return a maximum of 10,000 entries.

[Waitlists](#) [Exception Requests](#) [Interest Tracking](#)

☒ Search for all Events ☐ Search for all Sessions

☒ View Active Events Only ☒ Enable Learning Search

(11 Results)

Event Name	Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Options
Achieving Your Highest Priorities	Business and Professional Skills	Career Education	English (US) ...	1	23	3	<a href="#">View Sessions</a>   <a href="#">Edit Event</a>   ...
Orientation Class	Learning	Internal	English (US) ...	0	25	0	<a href="#">View Sessions</a>   <a href="#">Edit Event</a>   ...

### Options (Primary and Secondary)

In the new user interface, the options for managing events and sessions no longer display as icons, but as links. The two primary actions for an event or session display as links directly in the Events or Sessions table, and the remaining secondary actions for an event or session are located in a drop-down menu. To expand the drop-down menu of secondary options, click the "... " icon next to an event or session.

### Manage Events & Sessions

Event are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule new sessions. Note that the search will return a maximum of 10,000 entries.

Waitlists

Exception Requests

Interest Tracking

☒ Search for all Events
 ☐ Search for all Sessions

☒ View Active Events Only
 ☒ Enable Learning Search

(11 Results)

Event Name	Subjects	Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Options
Achieving Your Highest Priorities	Business and Professional Skills	Career Education	English (US) ...	1	23	3	<a href="#">View Sessions</a> <a href="#">Edit Event</a> <div> <a href="#">Edit Evaluation</a> <a href="#">View Evaluation Report</a> <a href="#">Copy Event</a> </div>
Orientation Class	Learning	Internal	English (US) ...	0	25	0	
Creative Problem Solving	Learning Business and Professional Skills	External Training	English (US) ...	0	24	3	

## Pop-Up Windows

### Find Subject

#### Subject Name

Accounting

Business and Professional Skills

Compliance and Sensitivity

Finance

Learning

Management & Leadership

Safety

> Sales & Marketing

Technical

# Search All Sessions

Manage Events & Sessions

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

Waitlists

Exception Requests

Interest Tracking

☐ Search for all Events

☒ Search for all Sessions

☒ Tentative

☒ Approved

☐ Completed

☐ Cancelled

Session ID

Location

Event Name

Course Code

Instructor

Subject

Locator Number

Vendor

Start Date (From)

Start Date (To)

End Date (From)

End Date (To)

Q Search

Create New Event

Export to Excel

(389 Results)

12345>>

Day	Start Date	End Date	Session ID	Event Name	Locator Number	Location	Instructor	Enrollment	Status	Event Options	Session Options
Wednesday	12/4/2030	12/4/2030		4 Roles of Leadership	433	London	Admin Ben ...	0 of 200	Approved	...	<a href="#">View Roster</a>   <a href="#">Edit Session</a>   ...
Wednesday	11/6/2030	11/6/2030		4 Roles of Leadership	432	London		0 of 200	Approved	...	<a href="#">View Roster</a>   <a href="#">Edit Session</a>   ...

## Reporting Fields - Learning

With the November '22 Release, new fields have been introduced to the Certifications area of Reporting 2.0:

- Certifications > Certification Removal History fields have been added
- Certification Removal History > Assigned by fields have been added
- Certification Removal History > Removed by fields have been added
- Certification Removal History > User have been added
- Transcript

### Certification Removal History

The following new fields have been added to the **Certification Removal History** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Certification ID	This field displays the unique identifier of the certification at the time of removal.	Numeric
Certification Title	This field displays the title of the certification at the time of removal.	Text
Certification User Status	This field displays the user's certification status at the time of removal. Example statuses include New, In Progress, Certified, Expired, Certified (Renewal in Progress).	Text
Certification Status	This field displays the certification status at the time of removal. Example statuses include Active, Inactive.	Text
Certification Period	This field displays the Certification period the user was in at the time of removal.	Text
Certification Period Expiration Date	This field displays the certification period expiration date at the time of removal.	Date
Certification Period Due Date	This field displays the certification period due date at the time of removal.	Date
Certification Version	This field displays the certification version for the user at the time of removal.	Numeric
Assignment Date	This field displays the most recent certification assignment date of the user in the certification that was removed.	Date
Assignment Method	This field displays how the user was previously enrolled in the certification that was removed. "Requested" indicates the user searched for and requested the certification, "Assigned"	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
	indicates the user was enrolled in the certification by a manager or proxy enrollment and "Enroll as certified" indicates certified was selected during the proxy enrollment process.	
User Status	This field displays the user status at the time of removal. This may be inactive, active, pending approval or N/A.	Text
Removal method	This field displays how the user was removed from the certification. Individual indicates the delete from the certification management page was used. Dynamic indicates the user was dynamically removed and bulk indicates the CSV bulk removal process was used.	Text
Removal comments	This field displays the comments entered when the user was removed from the certification.	Text
Removal date	This field displays the date the user was removed from the certification.	Date

#### **Certification Removal History > Assigned by**

The following new fields have been added to the **Certification Removal History > Assigned by** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
User ID	This field displays the User ID of the user who had previously assigned the certification that was removed.	Text
User Full Name	This field displays the User Full Name of the user who had previously assigned the certification that was removed.	Text
User First Name	This field displays the User First Name of the user who had previously assigned the certification that was removed.	Text
User Last Name	This field displays the User Last Name of the user who had previously assigned the certification that was removed.	Text

#### **Certification Removal History > Removed by**

The following new fields have been added to the **Certification Removal History > Removed by** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
User ID	This field displays the user id of the user who removed the user from the certification.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
User Full Name	This field displays the Full Name of the user who removed the user from the certification.	Text
User First Name	This field displays the First Name of the user who removed the user from the certification.	Text
User Last Name	This field displays the Last Name of the user who removed the user from the certification.	Text

### Certification Removal History > User

The following new fields have been added to the **Certification Removal History > User** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
User ID	This field displays the user ID of the user who was removed from the certification.	Text
User Full Name	This field displays the Full Name of the user who was removed from the certification.	Text
User First Name	This field displays the First Name of the user who was removed from the certification	Text
User Last Name	This field displays the User Last Name of the user who had previously assigned the certification that was removed.	Text

### Transcript

The following new field has been added to the **Transcript** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Transcript Start Date	This field displays the date on which Transcript is started.	Date

### Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

### Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

**Search**

## Learning Search Framework – Now Enhanced Search

With this release, Cornerstone is now using the name "Enhanced Search" instead of "Learning Search" when referring to our new search framework.

This name change will occur in the following areas:

- Course Catalog
- [SEARCH PREFERENCES > TRAINING](#) (Search Engine and Course Catalog - Search Engine)
- ILT – Manage Events and Sessions
- ILT Preferences

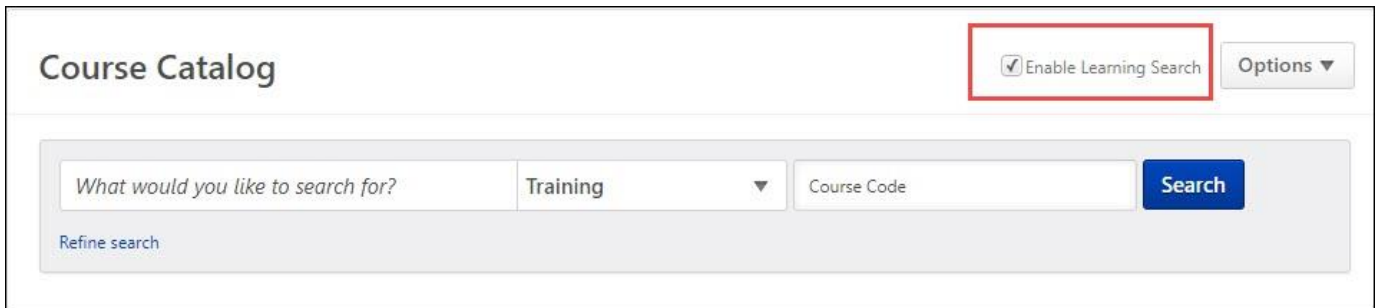
No functional changes result as part of this name change.



## Enhanced Search on Course Catalog – Filter Parity and Migration

This functionality is not available at the start of UAT.

With this enhancement, administrators can now enable Enhanced Search capabilities when searching the course catalog.



The screenshot shows the 'Course Catalog' header. In the top right corner, there is a checkbox labeled 'Enable Learning Search' which is checked, and an 'Options' dropdown menu. Below this is a search bar with the placeholder text 'What would you like to search for?'. To the right of the search bar is a dropdown menu currently set to 'Training'. Further right is a text input field labeled 'Course Code' and a blue 'Search' button. A 'Refine search' link is located below the search bar.

When the "Enable Learning Search" option is enabled, the following enhanced search filters are now available:

- Availability
- Active/Inactive
- Competency
- Course Rating
- Course Code
- Created By Me
- Credits
- Date Added to Catalog
- Downloadable Courses
- Instructor
- Location
- LO Status
- Session Date
- Show Courses with Recurrence
- Skills
- Subscription

To return to traditional search functionality, uncheck the "Enable Learning Search" box.

When Enhanced Search is enabled, a maximum of 10,000 results will be available for any single search performed. If more results are required, use traditional search.

### Rollout Schedule by Swim Lane

All stage swim lanes	October 18 (UAT 2) – It may take up to 7 days for the update in functionality to be present in your portal.
----------------------	---

<ul style="list-style-type: none"> <li>○ FRA SL1</li> <li>○ CDG SL1</li> <li>○ CDG SL4</li> <li>○ AU SL1 (AWS)</li> <li>○ JP SL1 (AWS)</li> <li>○ UK-SL1 (AWS)</li> <li>○ UK-SL2 (AWS)</li> <li>○ FRA SL1 (AWS)</li> <li>○ CDG SL1 (AWS)</li> <li>○ CDG SL4 (AWS)</li> </ul>	November 18 patch – It may take up to 14 days for the update in functionality to be present in your portal.
All LAX swim lanes	December 2 patch – It may take up to 14 days for the update in functionality to be present in your portal.
All LHR swim lanes	December 16 patch – It may take up to 14 days for the update in functionality to be present in your portal.

For more information, see [Where can we find our swimlane status?](#)

### Considerations

Administrators may also deactivate enhanced search for the Course Catalog in Search Preferences.

### Implementation

This functionality is automatically enabled for all organizations using the Course Catalog.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the	Learning - Administration

	<p>Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration

## Enhanced Search on Course Catalog – Filter Parity and Migration FAQs

This functionality is not available at the start of UAT.

Is the new Enhanced Search enabled by default?

Yes. Enhanced Search will be enabled by default for both Stage and Production portals. The preference located directly on the Course Catalog page will also be enabled by default.

Can we change the search framework?

Yes. Existing preferences both on the Course Catalog page and in Search Preferences > Training will continue to be available after this update. No changes will be made to these preferences aside from the change in default status for each portal.

How can I process a Bulk Edit?

Administrators can process a Bulk Edit by disabling Enhanced Search using the checkbox directly on the Course Catalog page, then performing a search and bulk edit as normal.

Does Cornerstone plan to allow for Bulk Editing when Enhanced Search is enabled?

Yes. We plan to allow for Bulk Editing when Enhanced Search is enabled in a future release.

My search results are not the same when Enhanced Search is enabled or disabled. Is that expected?

Yes. Enhanced Search and Traditional Search use different frameworks to produce search results. Therefore, search results may vary when using one framework versus another.

## Enhanced Search on Global Search– Filter Parity and Migration

With this enhancement, administrators can now enable Enhanced Search capabilities or traditional search when using Global Search.

The following filters are available when searching for training in Global Search when Enhanced Search is enabled:

- Location
- Competency
- Skills
- Instructor
- Credits
- Session Date

The following custom field data type filters are available to use when searching for training in Global Search when Enhanced Search is enabled:

- Check Box
- Hierarchy
- Radio Button
- Date
- Multi-Selection Check Box
- Dropdown
- Numeric

Title, Keyword, and Description filters are combined into one text filter. Filters use an 'AND' operation, including custom fields, which currently uses an 'OR' operation with traditional search.

### Rollout Schedule by Swim Lane

All stage swim lanes	October 12 (UAT 1) – It may take up to 7 days for the update in functionality to be present in your portal
<ul style="list-style-type: none"><li>○ FRA SL1</li><li>○ CDG SL1</li><li>○ CDG SL4</li><li>○ AU SL1 (AWS)</li><li>○ JP SL1 (AWS)</li><li>○ UK-SL1 (AWS)</li><li>○ UK-SL2 (AWS)</li><li>○ FRA SL1 (AWS)</li></ul>	November 4 patch – It may take up to 14 days for the update in functionality to be present in your portal

<ul style="list-style-type: none"> <li>○ CDG SL1 (AWS)</li> <li>○ CDG SL4 (AWS)</li> </ul>	
All LAX swim lanes	November 18 patch – It may take up to 14 days for the update in functionality to be present in your portal.
All LHR swim lanes	December 2 patch – It may take up to 14 days for the update in functionality to be present in your portal.

For more information, see [Where can we find our swimlane status?](#)

### Considerations

- The default setting will be set to Enhanced Search. Administrators can change this preference by going to [PREFERENCES > SEARCH PREFERENCES > TRAINING](#). Scroll to Search Engine and update the setting.
- Enhanced search and traditional search use different frameworks to produce search results. Search results may vary based on the type of search.

### Implementation

This functionality is automatically enabled for all organizations using the Global Search.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Admin Search Preferences - Manage	Grants ability to configure preferences for Global Search and Course Catalog within Search Preferences. The constraints of this permission are inherited from the Global Search Preferences - Manage permission. This is an administrator permission.	Learning - Administration

## Enhanced Search on Global Search– Filter Parity and Migration FAQs

[Is the new Enhanced Search enabled by default?](#)

Yes. Enhanced Search will be the framework of choice by default when your region has been migrated.

[Is it possible to change the search framework?](#)

Yes. Administrators will be able to change the global search framework from Enhanced Search to Traditional Search if you choose or if better for your portal. This can be done by using the re-instated search preference. However, we anticipate removing this preference and making Enhanced Search the sole framework provider in the future. We strongly suggest utilizing the new framework and providing feedback via Suggestion City.

[The date for my swim lane's update has passed, but I do not see the updated functionality in my portal yet. Is that expected?](#)

Yes. We expect that it could take as much as 7 days in stage and 14 days in production for the updates to take effect for all portals in each migration phase. If that time frame has passed and you still do not see an update, please contact GCS.

[How can I tell if my portal is updated?](#)

The best way to confirm if your portal has been updated will be to check the Search Preference for your portal.

[My search results are not the same when Enhanced Search is enabled or disabled. Is that expected?](#)

Yes. Enhanced Search and Traditional Search use different frameworks to produce search results. Therefore, search results may vary when using one framework versus another.

## **UI Modifications and Enhancements - November 2022**



## UI Modifications and Enhancements - November 2022

With this enhancement, user interfaces are upgraded:

- Course Catalog
- Curricula - Edit and Create
- Deep Links Administration
- ILT Create and Edit New Sessions and Events
- Materials Administration
- Training Request Approval

With these interface changes, no functionality changes are included. No functionality is added or removed.

### How Does this Enhancement Benefit My Organization?

This collection of enhancements for the November '22 Release is part of the larger initiative to provide a modern, consistent, improved administrator user experience to our customers. While we are confident that most of our customers will see tremendous value in the new enhancements, we also understand that accelerating the pace of innovation means trying new things. And that means changes we make to our products won't always work for everyone.

To that end, we are releasing our new UI/UX enhancements in Early Adopter mode, and have built guardrails into this release that enable you to maximize value and minimize risk:

**We encourage you to take a test drive first:** While we're confident that most of you will find great value in the new UI/UX features, you can make sure they're right for your team by taking a test drive in STAGE before implementing them in production. The enhancements are automatically enabled in Stage environments for all organizations and can be disabled via the Learning Feature Activation Preferences page (Admin Tools > Learning > Learning Preferences > Feature Activation > User Interface Modifications).

**It is your choice to turn on (or off) these new features:** You can choose to introduce these new features in production via the Learning Feature Activation Preferences. If there ever comes a time that you want to turn off these features and revert to your prior experience in Production or Stage, you can do so by disabling.

**Your feedback is key:** We have been receiving customer and have incorporated much of it into this release. As you test and introduce new enhancements to your teams, we want to hear from you! Your input and feedback will help us continue to deliver what you need for your teams and organizations. **Please share your feedback with us in Validation Station.**

### Frequently Asked Questions (FAQs)

[Does one preference govern all areas that have received an update?](#)

Yes. The Feature Enablement preference is used to access the updated user interfaces across the application.

[Can I enable or disable the preference at any time?](#)

Yes. The preference is a toggle that can be used to change whether the portal uses the updated interface or the legacy interface. However, the user must log out, then log in for the change to take effect.

#### Will Cornerstone be updating other features in the future?

Yes. Based on usage analytics and updated priorities, Cornerstone will continue to update other areas of the application in future releases.

#### How does customization and branding work with the updated designs?

Any customer with a custom theme and logo set in Display Preferences should expect their portal to work normally with this update. However, certain customers utilizing custom code or branding, such as Google Tag Manager, cannot utilize the new designs at this time.

#### After using the new designs, I noticed that some pages link to legacy pages or use legacy modal windows. Is that intentional?

Yes. Cornerstone plans to continue updating the application over the next several releases. However, there are currently many features and separate pages that still utilize legacy designs or modal windows that have not been updated yet.

#### How can I provide feedback on the new designs? Will Cornerstone be incorporating feedback into future designs and updates?

Feedback can be provided via **Validation Station**. Cornerstone is monitoring all feedback very closely and plan to improve all new designs within future releases. Be sure to include that you are working with the updated designs anytime feedback is posted.

### Considerations

Certain customers utilizing custom code or branding, such as Google Tag Manager, cannot utilize the new designs at this time.

### Implementation

This functionality is automatically enabled in Stage environments for all organizations. However, this functionality can be disabled in Stage environments.

Self-activation is available in Pilot and Production environments with the November '22 Release by going to **ADMIN TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES > USER INTERFACE MODIFICATIONS**.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Learning, Connect and Extended Enterprise.	Learning - Administration

## Feature Activation Preferences - User Interface Modifications


By default, the UI Modifications and Enhancements functionality is disabled for all organizations. These changes can be self-enabled by going to [ADMIN TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#).

A new *User Interface Modifications* section is now available. In this section, select the **ACTIVATE** button.

The preference can be deactivated, if necessary, to change whether the portal uses the updated interface or the legacy interface. However, the user must log out, then log in for the change to take effect.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Learning, Connect and Extended Enterprise.	Learning - Administration

 Success! User Interface Modifications activated.[All logged-in users must log out and log back in to receive the changes.]

**User Interface Modifications**  
Activation will update the user interface for Materials, Deep Links, Training Request Approvals, ILT Events and Sessions, Course Catalog and Curriculum. Deactivation will use the Legacy User Interface.

Deactivate

## New UI - Course Catalog

With this enhancement, the Course Catalog pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

To access the Course Catalog, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG](#). The Course Catalog can also be accessed by searching for training via the Learning Admin Console.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	<p>Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and 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 also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p>	Learning - Administration

Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.

## Course Catalog - Search

**Course Catalog**



☒ Enable Learning SearchOptions ▾

Training ▾

[Refine search](#)

To perform a Bulk Edit, please disable Learning Search at the top of the page.

Published ▾Active ▾By Rele... ▾☐ Show Courses with Recurrence☐ Downloadable Courses Only☐ Created by Me

<input checked="" type="checkbox"/>	Title	Provider	Version	Language	Created Date	Modified Date	Actions
<input checked="" type="checkbox"/>	 Curriculum Version Test	123 Trainers	1.0	English (US)	10/4/2017	10/4/2017	...
<input checked="" type="checkbox"/>	 Manufacturing Curriculum	123 Trainers	1.0	English (US)	10/4/2017	10/4/2017	...

## Course Catalog - Edit

**Edit 01. Problem Solving: Introduction to Problem Solving**

Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.

<GENERALPREREQUISITESSUBJECTSSKILLSCOMPETENCIESACKNOWLEDGEMENTAPPROVAL WORKFLOWAVAILABILITYEMAILSRECO >

\* Course Title

Keywords

Description

Although a "problem solving" series is for those with broken systems, flawed processes or team failures, it is also for you. Unless your team is doing 10% of their job, 10% right, 10% of the time, then you have a problem to solve.


Subscriptions

**Content Anytime Professional Skills**

Content Source

**Cornerstone Library**

Thumbnail Image



Original Title

**I am the Original Title**

Provider

**ej4**

Version

**Online Class**

## New UI - Curricula - Edit and Create

With this enhancement, the Curricula - Edit and Create pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

To access Curricula Administration, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CURRICULA](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Admin - Manage	<p>Grants ability to create new and edit/update existing curricula. This permission can be constrained by OU, User's OU, Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p> <p><b>Tip:</b> Do not constrain this permission to your entire corporation; it can cause long page load times and timeout errors. Applying this constraint is functionally the same as leaving the permission unconstrained, but omitting this constraint does not cause the system to do the unnecessary constraint checks as in the former scenario.</p>	Learning - Administration
Curriculum Admin - View	<p>Grants view only access to curriculum details via Curriculum Administration screen. Does not include ability to view details of users enrolled in curricula. This permission can be constrained by Provider, OU, User's OU, and User's LO Availability.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p> <p><b>Tip:</b> Do not constrain this permission to your entire corporation; it can cause long page load times and timeout errors. Applying this constraint is functionally the same as leaving the permission unconstrained, but omitting this constraint does not cause the system to do the unnecessary constraint checks as in the former scenario.</p>	Learning - Administration

# Curricula Administration

## Curricula Administration

Training Title

English (US)

☐ Include Inactive

Search

Manage Curricula

View Pending Requests

Create New Curriculum

Title	Description	Version	Language	Effective Date	Created By	Owners	Active
4 Roles of Leadership	Lorem ipsum dolor sit amet	1.0	English	04/01/2021	Marco Alives	Marco Alives	<div><input type="checkbox"/></div> <div>Edit</div> <div>...</div> <div></div>

## Create New Curricula

# Create New Curricula



## General

\* Title



Keywords



Description

**B** /  U  

0 / 500

Available Languages

English (US)



Default Language English (US)

\* Vendor

Select a Vendor








# Manage Enrolled Users

## Enrolled Employees for Annual In-Service Training for Fire Personnel

View the worksheets of users enrolled in this curriculum. If the structure of the curriculum has been modified, then users with different versions of the curriculum will have different requirements.

 Search Users by Last Name

All Versions 

 Search

Employees

Modify Version of Selected Users

Version	Name	Organizational Unit	Status
1.0	James Roe	Lorem Ipsum	Not Started
1.0	Jane Doe	Lorem Ipsum	Not Started

Back

## New UI - Deep Links Administration

With this enhancement, the Deep Links Administration pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

To access the Deep Link page, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > DEEP LINKS](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Deep Link: Manage	Allows administrator to define the Base URL for all SSO module links. This permission cannot be constrained. This is an administrator permission.	Core Administration
Deep Link: View Modules	Allows administrator to view the deep links URLs. This is an administrator permission.	Core Administration

### Deep Link Administration

#### Deep Link ⓘ

Base URLPage URLDeep Link Generator

Add New Base URL

Title	Availability	Link
⋮ Sales	Division Sales	<a href="https://demogts-access.cloudapp.net/app/course/ae4c44e0-947b-4de9-b4f8">https://demogts-access.cloudapp.net/app/course/ae4c44e0-947b-4de9-b4f8</a> <a href="#">Edit</a>   <a href="#">Delete</a>

Back

### Deep Link Generator

#### Deep Link ⓘ

Base URLPage URLDeep Link Generator

Page URL

Image

Alternate Text

Link Expiration Date

Select

No Image

Insert Text

☐

MM/DD/YYYY

Generate Links

Back

## New UI - ILT Create and Edit New Sessions and Events

With this enhancement, the ILT Create and Edit New Sessions and Events pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

To access the Manage Events and Sessions page, go to [ILT > MANAGE EVENTS AND SESSIONS](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT	Learning - Administration

	<p>Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.</p> <p><b>Note:</b> The "Restrict to User as Instructor" constraint is available, but it does not actually constrain the permission.</p>	
Sessions - Edit	<p>Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.</p>	Learning - Administration
Sessions - View	<p>Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration

## Create Event - Properties

### Add New Event

#### Properties

• Event Name



Event Number



• Primary Vendor



Secondary Vendor



Training Hours

 hour(s)  minute(s)

Object ID

e5ca20a7-d28e-4134-936a-d2edeeb6f871

Description

**B** *I* U

Design HTML



## Create Session - Schedule Wizard

### Achieving Your Highest Priorities

Created by Jon Lolley on 10/7/2022



#### Schedule Wizard

Use the schedule wizard to create multiple sessions at once. The summary section will display the summary for one or more sessions.

##### Occurs

- ☒ Once
- ☐ Daily
- ☐ Weekly
- ☐ Monthly

##### Duration

##### Start Date

 10/8/2022

Cancel

Next

## Create Session - Parts Schedule

# Achieving Your Highest Priorities


Created by Jon Lolley on 10/7/2022




## Parts Schedule

### Edit Part


Name


Description




Subject

✓ Business and Professional Skills 

Location

Select Room Layout 

Add Resource 

## New UI - Materials Administration


With this enhancement, the Materials Administration pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

To manage materials, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > MATERIALS](#).

### Permissions

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

### Material Administration

 > Catalog Management

## Material Administration

☐ Include inactive

### Materials

Title	Type	Provider	Description	Version	Language	Effective Date	Created By	Active	Options
401K Enrollment	Publications	1st World Library	401K Enrollment form.	2.0	English (US)	1/25/2017	Herzog, Jessica	<input checked="" type="checkbox"/>	<a href="#">Edit</a> ...
Accounting Basics	Communities	1st World Library	Basic training for our accounting team	1.0	English (US)	N/A	Herzog, Jessica	<input checked="" type="checkbox"/>	<a href="#">Edit</a> ...



# Manage Material Types

## Manage Material Types

Create custom material types. These will then be available for association with all materials you create as learning objects.

### Material Types

☐

Include inactive

Add New Type

Title	Active	Options
Communities		<a href="#">Edit</a>
Multimedia		<a href="#">Edit</a>
On The Job Training		<a href="#">Edit</a>
Publications		<a href="#">Edit</a>

Back

## Create New Materials

### Create New Materials



#### General

• Title



• Material Type

• Provider

#### Training Hours

hours

minutes

#### Description



#### Resources

No attachments have been uploaded for this Material

## New UI - Training Request Approval

With this enhancement, the Training Request Approval pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

The View Pending Requests page can be accessed in the following ways:

- Go to [LEARNING > MANAGE EMPLOYEE LEARNING](#). From the Manage Employee Learning page, select the *Manage Pending Requests* link.
- Go to [REPORTS > STANDARD REPORTS > TRACK EMPLOYEES > PENDING REQUESTS](#). See *Pending Requests Report*.
- Go to the Welcome page and click the *Approve Training* link in the Your Inbox widget. **Note:** *The Your Inbox widget must be enabled for the portal by the administrator.*

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Approve Training by Approver	Grants ability to approve training requests of those for whom the user is the designated approver.	Learning
Approve Training by Cost Center Approver	Grants ability to approve training requests of those for whom the user is the designated cost center approver.	Learning
Approve Training by Manager	Grants ability to approve training requests of those for whom the user is the designated manager.	Learning
Employee Transcripts - Manager/Approver Access	<p>Grants access to transcript (training record) screen of those for whom user is designated manager, approver or cost center approver. System administrators can access all user transcripts from this page. Link to this screen appears under Standard Reports/Track Employees. This is a manager/approver permission. This permission can be constrained by Employee Relationship and User's Direct Subordinates.</p> <p><b>Note:</b> <i>The Employee Relationship constraint allows administrators to constrain the permission to a user's custom employee relationship. For example, an administrator can select to restrict the Matrix Manager relationship to viewing user data for users who have that Matrix Manager indicated on their user record.</i></p> <p><b>Note:</b> <i>The User's Direct Subordinates constraint allows administrators to constrain the data that a user can view</i></p>	Reports - Track Employee

to only the data for their direct reports. The user will not be able to view their own data with this constraint.

**Note:** By design, for any Track Employees report permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.

## View Pending Requests

### View Pending Request

View outstanding training requests you must approve, defer, or deny. Deferring a request will send the request to the next person in the approval chain for that employee. Click on the employee's name to view their transcript. If you would like others to make approvals on your behalf, you may share your approving permissions for users for whom you are the following:

#### Approver

Cost Center Approver

### Training Pending Approval

[Printable Version](#)[Export to Excel](#)

Request By	Transcript	Training	Training Type	Type	Date	Purpose	
Lina Ferguson Cornerstone Administration Division (Division) Administrator (Position)	<a href="#">View Transcript</a>	<a href="#">100 Things Every Decision framework</a>	External Training	Completion	3/22/2021 8:00 AM	QA Knowledge <a href="#">Select Category</a>	<a href="#">Approve</a>   <a href="#">Defer</a>   <a href="#">Deny</a>
Nora Beck Cornerstone Administration Division (Division) Administrator (Position)	<a href="#">View Transcript</a>	<a href="#">Setting Priorities: Decision framework</a>	Event	Initial	10/23/2018 10:14 AM	QA Knowledge <a href="#">Select Category</a>	<a href="#">Approve</a>   <a href="#">Defer</a>   <a href="#">Deny</a>

# Versioning Dashboards for Curricula, Online Classes, and Materials

## Versioning Dashboards for Curricula, Online Classes, and Materials

With the November '22 Release, versioning dashboards for Material and Online Classes are accessible from the Course Catalog and Course Console. These dashboards are similar to the curriculum versioning dashboard which has also been enhanced with this release.

### How Does this Enhancement Benefit My Organization?

This enhancement provides administrators with insight into the versioning options selected as well as the users impacted during the versioning of curricula, online classes, and materials.

### Considerations

- For curricula, the Versioning Dashboard supports the following types of reversioning:
  - Curricula that are versioned due to a material or online class child learning object being versioned
  - Curricula that are versioned due to edits to the structure page of the curriculum in Curricula Administration
- For curricula, the Versioning Dashboard does not support the following:
  - Users with curricula that are versioned directly using the Modify Version of Selected Users on the Manage Enrolled Users page; These users are not displayed in the Affected Users panel.
  - Users with curricula that are versioned during learning assignment processing; These users are not displayed in the Affected Users panel.
- For online classes and materials, the Versioning Dashboard supports the following types of reversioning:
  - Materials that are versioned from the Material Administration page
  - Materials that are versioned through a Document Management System (DMS) integration
  - Online classes that are versioned from the Course Console
- For online classes and materials, the Versioning Dashboard does not support the following types of reversioning:
  - Users with online classes or materials that are versioned during learning assignment processing; These users are not displayed in the Affected Users panel.
  - Online classes and materials that have the version set higher than 1.0 through another process such as online publishing or loading through Edge
- For Document Management System (DMS) materials, the Versioning Dashboard only supports materials that are versioned using the Assign To: Users Assigned by Learning Assignment option.
- The flyout that displays the details of the constraints is not available for curricula for this release. This will be delivered in a future release.

### Implementation

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

The link to access the dashboard is available in the Course Console for curricula, materials, and online courses by clicking the Version Details link in the Course Console “More Options” drop-

down. It can also be accessed via the “Actions” menu for these training types in Course Catalog search results. The Version Details link is only available for curricula, materials, or online classes that have a version of 2.0 or greater.

The versioning dashboard for Online Classes is supported for customers using Content Uploader. It is not supported for customers using the legacy Course Publisher Tool.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	<p>Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and 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 also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p>	Learning - Administration

Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.



## Curriculum Versioning Dashboard Enhancements

The curriculum versioning dashboard is expanded to include additional versioning details in three new panels.

- **Assignment Details** - This panel displays the assignment selections made during versioning: Users Assigned by Learning Assignment or Define by OU. Users with Previous Version(s) on Transcript details are not included in this panel. Instead, this version selection is captured in the Version Details panel and users in the Impacted Users panel.
- **Permissions** - This panel displays permissions related to versioning and a total count of constraints set at the time of versioning.
- **Versioning Originated From** - This panel displays if the curriculum version originated from a material or online class version, with a clickable link to the material/online class versioning details if applicable.

The Versioning Dashboard page can be accessed from either the Course Console or the Course Catalog:

- Go to: [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG](#). Search for the curriculum and click the curriculum's title. This navigates you to the Course Console page for the curriculum. Open the **Options** drop-down. Click the **Version Details** link.

OR

- Go to: [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG](#). Search for the curriculum and click the **Actions** drop-down next to the curriculum. Click the **Version Details** link.

The **Version Details** link is only available for curricula, materials, or online classes that have a version of 2.0 or greater. Dashboards for past versions can be viewed by searching the Course Catalog for the older version.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and 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 also allows administrators to reversion online courses via the Course Console page. This	Learning - Administration

	<p>permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	
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Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration
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### Curriculum Versioning Dashboard Page Title

With this enhancement, the page title is updated to "Curriculum Versioning Dashboard" to clearly indicate that this page relates to a curriculum.

### Impacted Users Search

Prior to this enhancement, administrators could not search for users in the Impacted Users section by full name. Administrators could only search by first or last name. If first and last name were included, no results would return even if there was a matching user.

With this enhancement, administrators can now search for users in the Impacted Users section by full name.

### Assignment Details

The *Assignment Details* panel displays the assignment selections made during versioning: Users Assigned by Dynamic Assignment or Define by OU.

Details regarding Users with Previous Version(s) on Transcript are not included in this panel. Instead, the version selection is captured in the *Version Details* panel and users in the *Impacted Users* panel.

**Note:** This section is not displayed if the curriculum version was initiated due to the versioning of a child LO such as an online class or material.

For assignments defined by organizational unit, the following information is displayed:

- OU Type - This displays the type of organizational unit that was included in the assignment.
- Name - This displays the name of the organizational unit that was included in the assignment.
- Include Subordinates - This displays whether the Include Subordinates option was selected for the organizational unit.

If more than five assignments are available, a Search feature is available. Administrators can search by OU Type or Name.

Assignment Details		
Define By OU		
OU Type	Name	Include Subordinates
Group	OverassignmentOU1	No
Group	OverassignmentOU2	No
(2 Results)		

For assignments defined by dynamic learning assignment, the following information is displayed:

- LAT ID - This displays the unique identifier for the learning assignment.
- Training Title - This displays the title of the training included in the learning assignment.
- Assignment Type - This displays the type of learning assignment (e.g., Dynamic, Dynamic Recurring).
- Create Date - This displays the date on which the learning assignment was created.
- Created By - This displays the name of the user who created the learning assignment.

If more than five assignments are available, a Search feature is available. Administrators can search by LAT ID or Training Title.

## Assignment Details

### Dynamic Assignment Details

Q Search By LAT ID or Training Title

LAT ID	Training Title	Assignment Type	Create Date	Created By
2997	Annual Compliance	Dynamic	09/16/2022, 10:46 AM	Debbie Tatu
2996	Annual Compliance	Dynamic	09/16/2022, 10:46 AM	Debbie Tatu
2995	Annual Compliance	Dynamic	09/16/2022, 10:45 AM	Debbie Tatu
2994	Annual Compliance	Dynamic	09/16/2022, 10:44 AM	Debbie Tatu
2993	Annual Compliance	Dynamic	09/16/2022, 10:43 AM	Debbie Tatu

1 2 > (8 Results)

## Permissions

The *Permissions* panel displays permissions related to versioning and a total count of constraints set at the time of versioning.

The following information is displayed:

- Has curricula version permission - This displays whether the user who created the version had the *Curricula Version - Manage* permission.
- Has curricula manage permission - This displays whether the user who created the version had the *Curricula Admin - Manage* permission.
- Total Constraints - This displays the total number of constraints that were applied to both of the user's permissions at the time the user created the version. The constraints on these permissions determine for which users the administrator can assign a new version of a curriculum when reverting the curriculum.

The flyout that displays the details of the constraints is not available for curricula for this release. This will be delivered in a future release.

Permissions	
Permission	Enabled
Has curricula version permission	True
Has curricula manage permission	True
Total Constraints	0

### Versioning Originated From

The *Versioning Originated From* panel displays details about the material or online class from which the curriculum version was initiated.

The following information is displayed:

- Training Title - This displays the title of the training that initiated the curriculum versioning.
- Object Id - This displays the unique identifier for the training that initiated the curriculum versioning. If the curriculum version originated from a material or online class within the curriculum, administrators may select the Object ID link to view the Versioning Dashboard for the corresponding training item.
- Training Type - This displays the type of training that initiated the curriculum versioning.
- Version - This displays the version number for the training that initiated the curriculum versioning.
- Created On - This displays the date on which the version was created.

Versioning Originated From				
Training Title	Object Id	Training Type	Version	Created On
Continuing Crucial Conversations	<a href="#">0d471742-8389-4f52-a632-39e99ff2b052</a>	Material	4.0	8/26/2022 5:57 PM

## Material and Online Class Versioning Dashboards

With this enhancement, a new Versioning Dashboard is now available for material and online class training items. These new dashboards contain the following panels:

- **Version Details** - This panel provides details on metadata such as title, creation date, created by, plus options selected during versioning of the online class
- **Impacted Users** - This panel gives details on the users impacted due to the versioning of the online class. A User Search is available with Version Status and Transcript Status filters to refine search results
- **Impacted Curricula** - This panel displays curricula impacted by the online class versioning with a link to the curriculum
- **Assignment Details** - This panel displays assignment selections made during versioning: Users Assigned by Learning Assignment or Define by OU. Users with Previous Version(s) on Transcript details are not included in this panel. Instead, this version selection is captured in the Version Details panel and users in the Impacted Users panel
- **Permissions** - This panel displays permissions related to versioning and a total count of constraints set at the time of versioning including a flyout with constraint details

The Versioning Dashboard page can be accessed from either the Course Console or the Course Catalog:

- Go to: [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG](#). Search for the training and click the training's title. This navigates you to the Course Console page for the training. Open the **Options** drop-down. Click the **Version Details** link.

OR

- Go to: [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG](#). Search for the training and click the **Actions** drop-down next to the training. Click the **Version Details** link.

The **Version Details** link is only available for curricula, materials, or online classes that have a version of 2.0 or greater. Dashboards for past versions can be viewed by searching the Course Catalog for the older version.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the	Learning - Administration

	<p>Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	
Course Catalog - View	<p>Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration

## Version Details

The *Version Details* panel displays the following information:

- **Training Title** - This field displays the training title.
- **Created On** - This field displays the date and time the training version was created.
- **Created By** - This field displays the name of the user who versioned the training.
- **Training Type** - This field displays the learning object (LO) type.
- **Effective Date** - This field displays the date and time the new version of the training became effective in the system.
- **Start Date** - This displays for Append training only. This field displays the date on which the new version officially replaces the previous version.
- **Version Type** - This field shows whether the training was versioned with Replace versioning or Append versioning.
- **Versions Selected** - This field shows which versions of the training were selected for reversioning.

- **Statuses Selected** - This field shows which transcript statuses were affected by the versioning.
- **Version** - This field shows the current version number of the training.
- **Assigned To** - This field shows the users selected to receive the new version. Available options for this field during the versioning process include:
  - Users with Previous Version(s) on Transcript
  - Users Assigned by Learning Assignment
  - Define by OU
- **Comments** - This field displays any comments added by the user who versioned the training.
- **Version Equivalency** - This field displays the version equivalency settings for the version (e.g., Requires Retraining, Versions Equivalent, Completed Equivalent).
- **Due Date** - This field displays the due date settings for the version.

**Note:** When a curriculum is versioned due to its child training being versioned, this is designated on the Version Details panel. The following fields on the Version Details panel are hidden in this scenario because they are not applicable:

- *Effective Date*
- *Versions Selected*
- *Statuses Selected*
- *Maintain Progress*
- *Assign New Occurrence*
- *Assigned To*
- *Comments*

Version Details					
<b>Training Title</b> Leadership Conversations	<b>Created On</b> 8/25/2022 7:32 PM	<b>Created By</b> Debbie Tatu	<b>Training Type</b> Online Class	<b>Effective Date</b> 8/25/2022 7:33 PM	<b>Version Type</b> Replace
<b>Versions Selected</b> All versions	<b>Statuses Selected</b> Not Started, In Progress, Completed	<b>Version</b> 5.0	<b>Assigned To</b> Users assigned by dynamic assignment	<b>Comments</b> Example scenarios added	<b>Version Equivalency</b> Requires Retraining
<b>Due Date</b> No Due Date					

### Version Details (Pending Version)

If Version with Append is used or a future date is set for the training item version, the training has a status of Pending Version. Because the final impacts of the version are not yet known, only the Version Details are displayed and "(Pending Version)" is appended to the section heading.



### Version Details (Pending Version)


<b>Training Title</b> Fire Marshal/Warden	<b>Created On</b> 10/04/2022, 06:13 AM	<b>Created By</b> Debbie Tatu	<b>Training Type</b> Material	<b>Effective Date</b> 10/04/2022, 06:13 AM	<b>Version Type</b> Replace
<b>Versions Selected</b> All Versions	<b>Statuses Selected</b> Not Started, In Progress	<b>Version</b> 4.0	<b>Assigned To</b> Users with previous version(s) on transcript	<b>Comments</b>	<b>Version Equivalency</b> Required Retraining
<b>Due Date</b> Apply Previous Version Due Date Criteria					

## Impacted Users

The *Impacted Users* panel includes information about the users who are impacted by the versioning. The *Impacted Users* panel may not display users in some scenarios. See the *Impacted Users - Scenarios* section for additional information.

**Note:** If Version with Append is used or a future date is set for the training item version, the training has a status of Pending Version. Because the final impacts of the version are not yet known, this section is not displayed.

The following information:

- **User Search** - Administrators can search for users by typing the user's first name, last name, full name, username, or User ID into the search bar. To run the search, the administrator must click the Search icon  after entering search criteria. Filters are available to further filter the search:
  - **Version Status** - Use this filter to filter users by version status.
  - **Transcript Status** - Use this filter to filter users by transcript status.
- **Version Status Breakdown** - This area shows how many users are in each version status:
  - **Processed** - These are users who were processed due to the versioning of the training. These users have the latest version of the training.
  - **Errored Out** - These are users who were not processed due to system errors.
  - **In Process** - These are users who are currently in the versioning queue.
  - **Original** - This is the original list of users who were included in the versioning.
- **Table of Users** - This table displays the users who have a version of the training on their transcript. The users in this table are sorted by name. The table displays the following information about each user who has a version of the training on their transcript:
  - Version
  - Name
  - Username
  - User ID
  - Process Date
  - Version Status
  - Transcript Status
  - LO Type

If more than 20 users display in the table, the table is paginated, with 20 users per page.

### Impacted Users

Version Status

Transcript Status

Hide

24  
Processed

0  
Errored Out

0  
In Process

24  
Original

Version	Name	User Name	User ID	Process Date	Version Status	Transcript Status	LO Type
5.0	Agent Smith	asmith	asmith	8/25/2022 7:34 PM	Processed	Registered	Online Class
5.0	AI Canary	ACanary	ACanary	8/25/2022 7:34 PM	Processed	Registered	Online Class

### Impacted Curricula

The *Impacted Curricula* panel displays details about any curricula that are impacted by the versioning of this training. This section is not displayed if there are no impacted curricula.

**Note:** *If Version with Append is used or a future date is set for the training item version, the training has a status of Pending Version. Because the final impacts of the version are not yet known, this section is not displayed.*

The following information is displayed for each impacted curriculum:

- Title - This displays the title of the impacted curriculum.
- Object Id - This displays the unique identifier for the curriculum that is impacted by the versioning. Administrators may select the Object ID link to view the Versioning Dashboard for the corresponding curriculum.
- Version - This displays the version number for the curriculum that is impacted by the versioning.
- Last Updated Date - This displays the date on which the curriculum was last updated.

### Impacted Curricula

Title	Object ID	Version	Last Updated Date
Curriculum_CVR_OC_Regression_20220831194956_49	<a href="#">91dee361-a4e4-4770-b215-7d917d8ed4ef</a>	4.0	9/1/2022 12:00 AM

If more than five curricula are impacted, a Search feature is available. Administrators can search by Title.

### Assignment Details

The *Assignment Details* panel displays the assignment selections made during versioning: Users Assigned by Dynamic Assignment or Define by OU.

Details regarding Users with Previous Version(s) on Transcript are not included in this panel. Instead, the version selection is captured in the *Version Details* panel and users in the *Impacted Users* panel.

**Note:** If Version with Append is used or a future date is set for the training item version, the training has a status of Pending Version. Because the final impacts of the version are not yet known, this section is not displayed.

For assignments defined by organizational unit, the following information is displayed:

- OU Type - This displays the type of organizational unit that was included in the assignment.
- Name - This displays the name of the organizational unit that was included in the assignment.
- Include Subordinates - This displays whether the Include Subordinates option was selected for the organizational unit.

If more than five assignments are available, a Search feature is available. Administrators can search by OU Type or Name.

Assignment Details		
Define By OU		
OU Type	Name	Include Subordinates
Group	11/22 LMS group	Yes
Group	1500UserOU	Yes
Group	600UserOU	Yes
Group	AR Group	Yes
(4 Results)		

For assignments defined by dynamic learning assignment, the following information is displayed:

- LAT ID - This displays the unique identifier for the learning assignment.
- Training Title - This displays the title of the training included in the learning assignment.
- Assignment Type - This displays the type of learning assignment (e.g., Dynamic, Dynamic Recurring).
- Create Date - This displays the date on which the learning assignment was created.
- Created By - This displays the name of the user who created the learning assignment.

If more than five assignments are available, a Search feature is available. Administrators can search by LAT ID or Training Title.

### Assignment Details

#### Dynamic Assignment Details

Q

Search By LAT ID or Training Title

\*

LAT ID	Training Title	Assignment Type	📅 Create Date	👤 Created By
2997	Annual Compliance	Dynamic	09/16/2022, 10:46 AM	Debbie Tatu
2996	Annual Compliance	Dynamic	09/16/2022, 10:46 AM	Debbie Tatu
2995	Annual Compliance	Dynamic	09/16/2022, 10:45 AM	Debbie Tatu
2994	Annual Compliance	Dynamic	09/16/2022, 10:44 AM	Debbie Tatu
2993	Annual Compliance	Dynamic	09/16/2022, 10:43 AM	Debbie Tatu

1

2

>

(8 Results)

## Permissions

The *Permissions* panel displays permissions related to versioning, whether the administrator had the permission enabled at the time of versioning, and a total count of constraints set for the administrator at the time of versioning. The type of training that is being versioned determines which permissions are listed.

Administrators can select the Constraints value to open a flyout that displays the details of the constraints. Constraints are categorized by the type of constraint, and each constraint displays whether the Include Subordinates option is selected for the constraint.

**Note:** If Version with Append is used or a future date is set for the training item version, the training has a status of Pending Version. Because the final impacts of the version are not yet known, this section is not displayed.

For materials, the following permissions are displayed:

Permissions	
Permission	Constraints
Material Version with Append - Manage	<a href="#">17</a>

For online classes, the following permissions are displayed:

Permissions	
Permission	Constraints
Online Class Version - Publish	0

### Impacted Users - Scenarios

The *Impacted Users* panel may not display users on the material or online class versioning dashboard but instead on the curricula versioning dashboard in some situations. If a user has been assigned a course or material as a standalone item and also within a curriculum and the material or online class is versioned impacting the curriculum, all impacted users who are assigned BOTH the standalone training item and the curriculum will appear only on the curriculum versioning dashboard.

#### Scenario 1

1. User A is assigned ABC Curriculum.
2. ABC Curriculum contains Course A and Course B.
3. User A was never assigned Course A outside of the curriculum.
4. Course A is reversioned which causes ABC Curriculum to re-version.

If the administrator navigates to the Course Catalog and accesses the Versioning Dashboard for Course A, the Impacted Users panel will not include User A. Clicking the Impacted Curricula link from Course A's versioning dashboard will display the Versioning Dashboard for ABC Curriculum and User A will display in the Impacted Users panel.

#### Scenario 2

1. User B is assigned Course A.

2. User C is assigned Course A.
3. User B is assigned ABC Curriculum.
4. User C is not assigned ABC Curriculum.
5. Course A is reversioned which causes ABC Curriculum to reversion.

If the administrator navigates to the Course Catalog and accesses the Versioning Dashboard for Course A, the Impacted Users panel will show User C but will not show User B. All of the other versioning selections that were made for Course A will appear on the Versioning Dashboard for Course A.

Clicking the Impacted Curricula link from Course A's Versioning Dashboard will display the Versioning Dashboard for ABC Curriculum and User B will display but User C will not display in the Impacted Users panel as the user is already included in the Course A Impacted Users list and does not have the curriculum assigned.

# Performance

Careers



**Check-Ins**

## Check-Ins Usability Enhancements

With this release, Check-Ins improves usability and consistency across many different screens.

### Hyperlinks in Check-Ins Comments

The updated inline text box editor lets users add hyperlinks to Check-Ins Comments.

### Improved Templates Page

The following improvements are now available on the Templates page:

- Padding and page elements are now consistent with other administration screens.
- A loading screen is now available on the manage templates page.

### Updated Check-Ins Wizard

Users can now select the First Meeting Date at the beginning of the process instead of the end of the process. This allows users to review and confirm all Check-Ins details on the same page.

GENERAL SETTINGS

LW

You • Accounting Manager

Allen Lee • Marketer

\* Check-in Name

Q1 2021 Development Check-In

28 / 200

Check-in Description

Please enter in a description for your check-in

0 / 1000

\* Meeting Frequency

Quarterly (Suggested)

▼

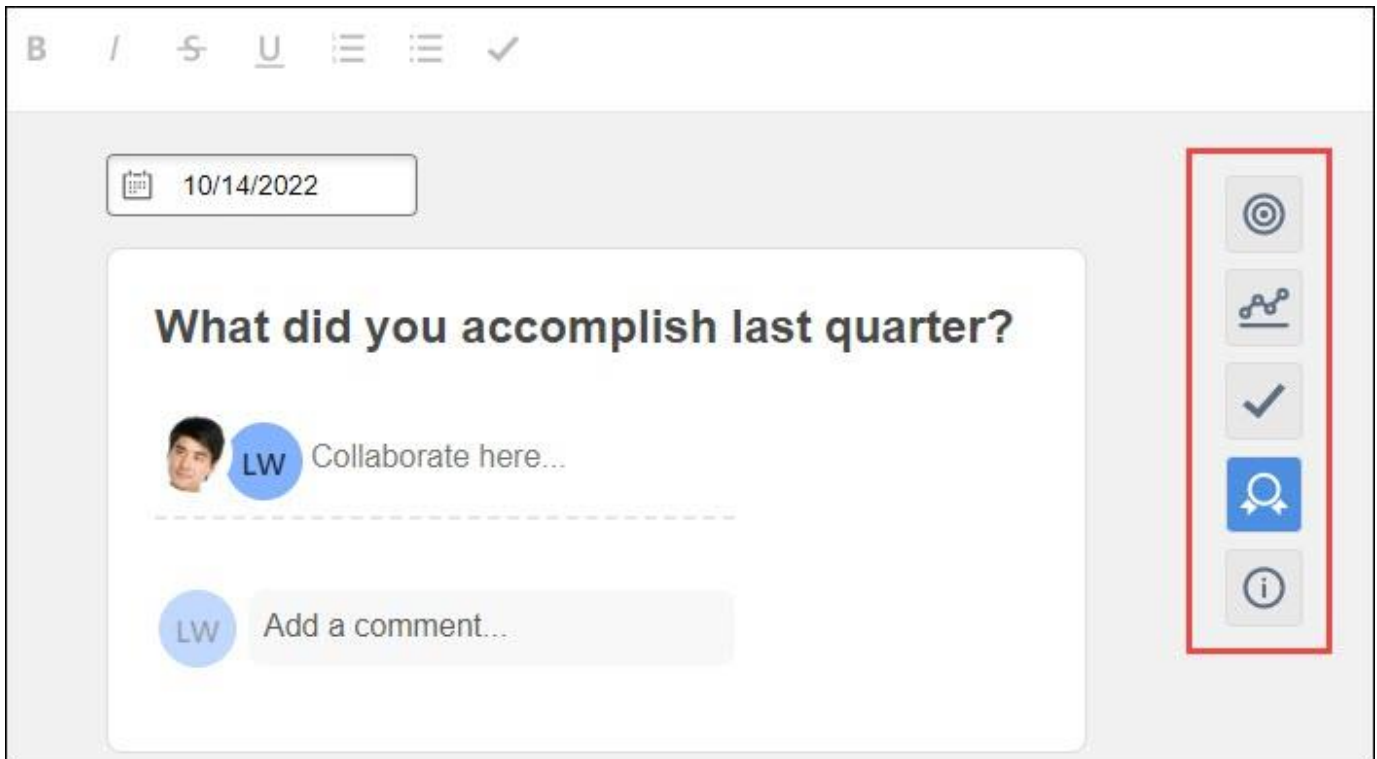
\* First Meeting Date

M/D/Y

Select a date for your meeting. this can be changed later

## Improved Sidebar Icon Functionality

All sidebar icons load and appear at the same time instead of displaying blank spaces while the icons load.



## Implementation

This functionality is automatically enabled for all organizations using the Check-Ins module.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users with constraints in the "Check-Ins - Create" permission cannot create a new Check-In with anyone who is not	Performance

	<p>part of the constraints, but can still view and update any Check-In in which they are a participant.</p> <p>This is an end user permission.</p> <p><b>Note:</b> <i>Permission constraint to Employee Relationship grants permission to dotted line or secondary managers to create Check-Ins with users that report to them in the matrix structure. A constraint "Restricted to Employee Relationship: Detail Supervisor" means that the Detail Supervisor can create a Check-In with their indirect subordinate but the indirect subordinate cannot create a Check-In with their Detail Supervisor.</i></p>	
Check-In Templates - Manage	Grants ability to manage Check-Ins Templates. This permission cannot be constrained. This is an administrator permission.	Performance

## **Skills in Check-Ins**

Prior to this enhancement, users were unable to access their skills profile if they wanted to have a skills discussion with their manager during a Check-In meeting.

With this enhancement, within Check-Ins, users can select the skills icon to access their Skills Profile, add and remove skills, and search for new skills.

Skills

LW Leigh Waller • Accounting Manager

Skills You Want To Develop

Choose the skills you wish to develop

We'll help you stay on track with your progress and prioritize suggested learning and development paths based on your preferences.

Develop Skills

Your Skills

Add skills you already have

Defining your skills will help us identify relevant opportunities for learning and career development.

Add Skills

Skills You Might Have

account reconciliation ...

accounting ...

accounting assistant ...

accounts payable ...

accruals ...

audit ...

balance sheet ...

Show more

Selecting a skill opens a capability details flyout to view skill details, endorsements, rating history, and related learning, if enabled.

### How Does this Enhancement Benefit My Organization?

Organizations can create better skill coaching experiences for employees during Check-In meetings.

### Implementation

This functionality is automatically enabled for all organizations using the Check-Ins module.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

## Reporting Fields - Check-Ins

With the November '22 Release, the following updates have been made to Reporting 2.0:

- New Check-Ins fields have been added
- New Check-Ins > Check-In Follow-Up Assignee fields have been added
- New Check-Ins > Check-In Note Owner fields have been added

With this enhancement, the following new fields are added to the **Check-Ins** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	VALUE (IF APPLICABLE)
Check-In Follow-Up Completed	True if a user has marked the follow-up as completed.	Text	Incomplete follow-up: "No" Completed follow-up: "Yes"
Check-In Follow-Up Content	This field displays the text description of the follow-up action to be taken.	Text	N/A
Check-In Follow-Up Due Date	The target date for completing the follow-up.	Date	N/A
Check-In Follow-Up Sequence Number	This field displays the index of the follow-up in the list of follow-ups extracted from the note.	Numeric	N/A
Check-In Note Content	The text content of the note.	Text	N/A
Check-In Note Type	This field displays whether the note is Collaborative (editable by all participants) or Individual (editable only by the participant who owns it).	Numeric	0 = Collaborative: the note is conceptually owned by all participants.  1 = Individual: the note is owned by a participant, but visible to all.

With this enhancement, the following new fields are added to the **Check-Ins > Check-In Follow-Up Assignee** section of Reporting 2.0:



FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	VALUE (IF APPLICABLE)
User Full Name	This displays the full name of the participant responsible for completing the follow-up.	Text	N/A
User ID	This displays the User ID of the participant responsible for completing the follow-up.	Text	N/A

With this enhancement, the following new fields are added to the **Check-Ins > Check-In Note Owner** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	VALUE (IF APPLICABLE)
User Full Name	For an individual note, this field displays the full name of the participant who can edit it. All participants can edit collaborative notes.	Text	For individual notes (type = 1): the Cornerstone full user name of the participant that owns the note.  For collaborative notes (type = 0): always 0, indicating "owned by all participants".
User ID	For an individual note, this field displays the User ID of the participant who can edit it. All participants can edit collaborative notes.	Text	For individual notes (type = 1): the Cornerstone User ID of the participant that owns the note.  For collaborative notes (type = 0): always 0, indicating "owned by all participants".

## Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

## Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

# Compensation

## **Deprecation of Compensation Loads for Data Load Wizard (DLW) with the November 2022 Release**

The ability to perform Compensation loads and feeds using Data Load Wizard (DLW) is deprecated with the November '22 Release. DLW Compensation loads and feeds include Employee Salary, Salary Structure, and Individual Targets. The modern self-service Edge Import framework for all Compensation loads and feeds is available.

Since the deprecation was first announced, Cornerstone has reached out proactively to all impacted customers to help customers migrate loads and feeds to Edge. In addition, Employee Compensation has been enabled for Compensation customers. Both End-of-Support and EndOf-Life for Data Load Wizard Compensation loads and feeds will occur with the November '22 release on November 4.

# Competencies

## Learning Object Checklist Enhancement

Prior to this enhancement, if the checklist failed, the checklist still shows as completed inside a certification/curriculum.

With this enhancement, a new setting is now available to control whether or not a Completed status will be recorded in a curriculum or certification for an LO (Learning Object) based Observation Checklist.

The new checkbox named **Mark checklist within a certification or curriculum Completed even if the user checklist is Completed with a Failed score** is visible under the following circumstances:

- A Score type rating scale is enabled
- A Failure Threshold is configured
- The Checklist Type is Learning Object

**Note:** This option only is visible if the observation checklist is a learning object type and configured to use a score.

+To access this new functionality, go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > OBSERVATION CHECKLISTS](#).

The screenshot shows the 'Preferences' form for Learning Object Checklists. The 'Checklist Type' is set to 'Learning Object'. A red box highlights the checkbox 'Mark checklist within a certification or curriculum Completed even if the user checklist is Completed with a Failed score', which is checked. Below this are sections for 'DATE CRITERIA', 'VALIDATION', 'SIGNATURE', and 'APPROVAL'.

**Preferences**

Checklist Type: **Learning Object** Note: The Competency Model will automatically be locked for a Learning Object checklist.

☒ Mark checklist within a certification or curriculum Completed even if the user checklist is Completed with a Failed score.

**DATE CRITERIA**

When are previously validated competencies valid in this checklist?

☒ Always Valid

☐ When validated on or after

☐ When validated up to  Day(s) before  Date Assigned

Note: Due dates for Learning Object checklists must be set within the curriculum or certification or at the time of assignment of the checklist.

**VALIDATION**

☐ Allow User's Manager to validate

☐ Allow User's Manager to define additional users to validate

Select OJ Criteria

**SIGNATURE**

Electronic Signature: ☐ Require electronic signature for observation checklist completion.

**APPROVAL**

☐ Require User's Manager approval

- If this option is enabled, a completed status is recorded regardless of the score.
- If this option is not enabled, the Checklist remains In Progress until it passes.

## How Does this Enhancement Benefit My Organization?

Administrators can now specify whether or not a completed status is sent to the Learning Management System (LMS) if the checklist is an LO included in a curriculum or certification and the threshold is not met.

### Considerations

- If this option is checked, even if a checklist is failed, the curriculum/certification is completion/credit and the checklist status shows Completed in the transcript and on the observation checklist pages.
- If this option is not checked and the checklist is failed and is required in a curriculum/certification, the curriculum is never complete/certification will never get credited as long as the checklist is failed. The checklist shows as In Progress when viewing in the curriculum/certification through the transcript but shows Completed Failed on any observation checklist pages.
- If the checklist is failed:
  - If the checklist needs to be re-validated, the administrator can reset the checklist so that the checklist can be validated again by the validator. If the checklist is then validated and is no longer failed, the curriculum/certification is updated with a completed checklist.
  - For a curriculum, an administrator could also re-assign the curriculum with Assign New Occurrence so that the user gets a reset checklist (this would also reset other LOs if they were present) and validate the checklist
  - If the checklist is not being re-validated then leave it as is and the curriculum will never be completed/certification will never get credit as it has a failed checklist. Some situations require that the curriculum/certification checklist remain completed and this will show up in reporting so that remediation can occur.
- To reset a checklist, go to [ADMIN - TOOLS - PERFORMANCE - OBSERVATION CHECKLISTS](#). Click the View Details icon under options, click the competency, and delete at least one item.

### Implementation

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

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Observation Checklist Admin - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

**Goals**

## Consolidated Management of Goals

Prior to this enhancement, before task completion, goals created in the goal planning section of a Performance Review Task were not visible on the My Goals page, Snapshot Goals, or in Reporting 2.0. Additionally if a user created a goal and the manager did not complete their review step, once the task expired, the goal did not appear on the My Goals page. Goals in Pending approval status were not visible in the goal planning section.

With this enhancement, before task completion:

- Goals created in the Goal Planning section are visible in read only status on the My Goals page, Snapshot Goals, and in Reporting 2.0.
- A new "In Review" status is added to identify goals currently being worked on in a goal planning section.
- The View History tab now shows the modification history for goals created in a goal planning task.

If a Performance Review Task contains a goal planning steps that expires, the goals created in the review task are now moved to Draft status and the Performance Review Task Expiration-Goal Moved to Draft Status email is triggered if configured in Email Administration. These goals are now available on the My Goals page.

Goals in Pending Approval status are now visible in the goal planning section of a Performance Review Task. Approvers can now approve a goal from this page.

### Considerations

The Performance Review Task Expiration-Goals Move to Draft Status email must be activated in Email Administration to trigger an email when goals created in the review task move to Draft status.

### Implementation

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

**Note:** *This enhancement impacts current and future performance review tasks.*



## View Only Access for Goals

Prior to this enhancement, users with access to another person's public goals had view and edit rights.

With this enhancement, on the Universal Profile Snapshot page, view and edit rights to others' public goals is controlled independently. Public goals are goals that have the "Allow other users to see and align" option selected.

**Note:** If a user or manager unchecks the "Allow other users to see and align" option, the user will see the goals in snapshot goals but the manager will not.

### Implementation

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

### Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot Goals - Manage	<p>Enables user to manage their own goals, and others public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile
Snapshot Goals - View	<p>Enables user to view their own goals, and others' public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile

**Note:** "Snapshot Goals - Manage" was previously named "Snapshot - Goals."

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Company Goals - Create	Grants access to create goals that appear to all users as "company goals." This permission cannot be constrained. This is an administrator permission.	Performance - Administration
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

## Reporting Fields - Goals

Prior to this enhancement, exception reporting was not available for Goal reporting in Reporting 2.0.

Following this enhancement, Goal reports in Reporting 2.0 will have configuration options that allow for creating exception reports (i.e. users who do not have Goals set up). This is achieved using the existing exception reporting options within Reporting 2.0.

### How Does this Enhancement Benefit My Organization?

Users can create reports to determine who has not created any goals and then choose the appropriate action for those individuals identified.

**Note:** Please select User fields from “Goals assignee” section and NOT from “User section” to get list of all the goals in exception report.

### Implementation

Upon release, this enhancement is available for all portals with Reporting 2.0.

# Performance Reviews

## Update Custom Emails In Review Tasks

Prior to this enhancement, after a review task is launched, administrators had to create work orders to edit or update custom emails.

With this enhancement, after a review task is launched, administrators can edit all fields in custom a custom email template.

Action	Action Type	Description	Add Email
☐ Performance Review Step Assigned	Performance Management	Performance review of a specific user assigned	

Email	Category	Recipients	Availability	Custom/Default	Language	Active	Options
DJ - A Performance Review Step has been assigned (for Reviewee)	Notification	Reviewee	All users in Division: DJ Enterprise (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
DJ - A Performance Review Step has been assigned (for Reviewee's Manager)	Notification	Reviewer	All users in Division: DJ Enterprise (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
GS test copy - IC_Step Assigned Email	Notification	Reviewer	All users in Division: YG Entertainment (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
IC_Step Assigned Email	Notification	Reviewer	All users in Division: YG Entertainment (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned	Notification	Reviewee	All users in Division: Sims 3 (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned	Notification	Reviewee	All users in Division: Abacus worldwide (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned - Reviewee	Confirmation	Reviewee		D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned - Reviewer	Confirmation	Reviewer		D	English (US)	<input checked="" type="checkbox"/>	

### Considerations

- Customers cannot delete a custom email after the task is launched.
- Customers can edit current emails, but not add new emails.

### Implementation

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

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who	Performance - Administration

	have this permission and are within the Admin Visibility settings can view the task, edit the task, add users, and view the task details. However, the admin cannot edit the Admin Visibility settings for the task. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The constraints on this permission control which users can be added to the task.	
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission also gives the ability to enable and view co-planners for a task from the administration pages. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration
Email - Edit From Address	Grants ability to edit the "from" address when creating or modifying an email trigger. In addition, the <b>Allow user to change email address</b> option must be selected in Email Preferences. This permission works in conjunction with the Global Email Administration - Manage permission. This is an administrator permission.	Core Administration
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

## Reporting Fields - Performance Reviews

With this enhancement, the following new field is added to the **Performance Review** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Task ID	This field displays the unique identifier for the performance review task.	Numeric

### Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

### Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

# Recruiting



## Candidate API – Support Jobs Posted Only in Internal Career Site

Prior to this enhancement, jobs must be posted in at least one external career site to be available in Candidate API (CAPI).

With this release, candidates can apply for positions through CAPI that are only on internal career sites (ICS).

### API Resources

See the following resources in the Cornerstone Success Center (CSC) for more information about APIs and the API Explorer:

- [Introduction to APIs](#)
- [API Explorer Overview](#)

Additional documentation is available in the API Explorer. [See Edge - API Explorer.](#)

### Considerations

Organizational Units (OUs) availability must match the candidate's OU.

### Implementation

This functionality is automatically enabled for all organizations using the Recruiting 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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Email on Manage Candidates – Support Rich Text Editor

Prior to this release, recruiters were only able to send email in plain text format.

With this release, a Rich Text Editor tool is provided when composing email to candidates. The rich-text editor provides additional formatting and alignment options, such as font size, bold and italicized text, bullets and numbering, and where text is aligned on the page. A **PREVIEW** button is also provided to review the content of the email before sending it.

Users can view emails created using the Rich Text Editor under Candidate Messages on the Manage Candidates page

### Starter Guide

Select this link to download the Manage Candidates Starter Guide.

### Implementation

- This functionality is automatically enabled for all organizations with Email from Managed Candidates enabled.
- Administrators must activate the Email on Manage Candidates feature to use this functionality. Go to [ADMIN > TOOLS > RECRUIT > FEATURE ACTIVATION PREFERENCES](#) to activate this setting.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Comments - Manage	Grants ability to view and manage comments for applicants.  This permission also defines whether comments posted when an interviewer submits an interview recommendation are posted to the Comments section on the Applicant Profile tab. <b>Note:</b> <i>Interview recommendation comments for interviewers who have this permission display on the Applicant Profile tab. For interviewers who do not have this permission, the comments do not display on the Applicant Profile tab.</i>	Recruiting
Applicants: Comments - View	Grants ability to view comments for applicants.	Recruiting

Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	<p>Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained.</p> <p><b>Note:</b> 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 <b>Requisition: Manage</b> permission overrule those of the <b>Requisition: Owner</b> permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting

## Job Alerts on Mobile-Friendly Career Sites

Prior to this enhancement, candidates on mobile sites were unable to set job alerts for relevant jobs.

**Note:** At this time, customers on SL4 environment cannot receive emails sent from Job Alerts on Mobile-Friendly Career Site.

### Administrators

With this enhancement, administrators can enable job alerts to allow candidates to create job alerts on a mobile-friendly site job search page. Administrators must enable Job Alerts for each mobile-friendly career site that requires it.

Administrators can enable job alerts in the following location: [ADMIN > TOOLS > RECRUIT > CAREER SITE > MOBILE-FRIENDLY CAREER SITES - SETTINGS](#).

### Candidates

Candidates can now go to their Career Site Home page to create job alerts that send an email when relevant jobs are posted to mobile-friendly career sites.

When creating job alerts, candidates can define the frequency of the alert and the search criteria for the alert according to the search query and filters available on the career site.

When jobs are posted that match the job alert request, an email is sent to the candidate that contains the a **View job** link and a **See all jobs** link if there are more than 10 matching jobs.

The email contains an **Unsubscribe** link that accesses the candidate's My Profile page to delete the job alert.

### Considerations

- Job alerts are sent at 8:00 am GMT.
- Customers on SLane4 environment cannot receive emails sent from Job Alerts on Mobile-Friendly Career Site

### Implementation

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

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by	Recruiting Administration

	OU and User's OU. This is an administrator permission.	
--	--	--

## Manage Candidates – Configure and Send Email Templates

With this enhancement, administrators can now create and activate email templates that recruiters can select and send from the Managed Candidates page.

### Administrators

To configure email templates, administrators can go to [ADMIN > RECRUIT > EMAIL TEMPLATES](#).

- Administrators can create, edit, activate, and inactivate templates. Only active templates appear on the Manage Candidates page.
- Only templates created by selecting the Candidate Email category display on the Manage Candidates page.
- Templates must be created in a default language first, followed by other languages, if necessary.

### Recruiters

To access email templates, Recruiters can go to the Manage Candidates page.

- Recruiters can select active, configured templates from the Choose a Template drop-down.
- Selecting a template automatically populates the associated Subject and Message information. These fields are editable, if necessary.
- By default, language is selected based on the logged-in user's language. To see the template in a different language, select an option from the Language drop-down.
- Tags can be used in email templates. The tags are replaced with relevant data when the email is sent.

### Considerations

Activating or inactivating a template applies to the template for all languages. It is not possible to mark a specific language in a template as active or inactive.

### Implementation

This functionality is automatically enabled for all organizations who have the Email from Manage Candidates functionality enabled.

### Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Recruiting Configure Email Templates- Manage	Grants ability to configure email communication templates. This permission cannot be constrained. This is an administrator permission.	Recruiting

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	<p>Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained.</p> <p><b>Note:</b> 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 <b>Requisition: Manage</b> permission overrule those of the <b>Requisition: Owner</b> permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting

## New Tags for Onboarding Email Templates

In this release, the following new email tags are added to the Onboarding Form Assigned and Completed Email templates:

TAG NAME	TAG DESCRIPTION
ONBOARDING.USER.EMAIL	Onboarding user's email address
ONBOARDING.USER.FIRST.NAME	Onboarding user's first name
ONBOARDING.USER.FUTURE.DIVISION	Pending new Division OU for onboarding user
ONBOARDING.USER.FUTURE.LOCATION	Pending new Location OU for onboarding user
ONBOARDING.USER.FUTURE.POSITION	Pending new Position organizational unit (OU) for onboarding user
ONBOARDING.USER.LAST.NAME	Onboarding user's last name
ONBOARDING.USER.HIRE.DATE	Onboarding user's hire date
ONBOARDING.USER.PHONE	Onboarding user's phone
ONBOARDING.USER.USERNAME	Onboarding user's user name

### Implementation

This functionality is automatically enabled for all organizations who have the Email from Manage Candidates functionality enabled.



## Referoo Integration

Referoo has integrated with Cornerstone to allow Cornerstone users to select candidates and request they complete the Referoo reference check process. Clients can create unlimited packages within the Referoo Application and access them within Cornerstone. Status updates are displayed in Cornerstone and final results and report URL returned to Cornerstone.

## Implementation

The integration is available to self-enable as of 23 September 2022 via [Edge Marketplace](#) for all organizations using Recruiting and also have an account with the integration vendor.

Additional instructions for enabling and configuring the integration are available in Edge. [See \*Edge Integration - Configure\*](#).

## 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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Reporting Fields - Recruiting

With the November '22 Release, the following updates have been made to Reporting 2.0:

- Requisition Template > Details fields have been added
- Ability to report on custom fields of the Requisition Template has been added

### Requisition Template > Details Fields

The following new field has been added to the **Requisition Template > Details** section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Requisition Template Reference Id	This field displays the Reference ID which is the unique identifier generated by a user when creating a requisition template from the Data Load Wizard or Edge Import Requisition Template Load.	Text
Requisition Template ID	This field displays the Requisition Template ID which is the system generated unique identifier for requisition templates created from the Data Load Wizard or Edge Import or from the user interface.	Text
Template Title	This field displays the title of the requisition template.	Text
Template Description	This field displays the description of the requisition template.	Text
Active	This field indicates whether the template is active or not.	Text
Position OU ID	This field displays the ID of the Position OU associated with the requisition template.	Text
Position OU Name	This field displays the name of the Position OU associated with the requisition template.	Text
Division OU ID	This field displays the ID of the Division OU associated with the requisition template.	Text
Division OU Name	This field displays the Name of the Division OU associated with the requisition template.	Text
Requisition Template Date Created	This field displays the date on which requisition template is created.	Date
Location OU Name	This field displays the ID of the Location OU associated with the requisition template.	Text
Location OU ID	This field displays the name of the Location OU associated with the requisition template.	Text

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Grade OU ID	This fields displays the ID of the Grade OU associated with the requisition template.	Text
Grade OU Name	This fields displays the name of the Grade OU associated with the requisition template.	Text
Cost Center OU ID	This fields displays ID of the Cost Center OU associated with the requisition template.	Text
Cost Center OU Name	This fields displays the name of the Cost Center OU associated with the requisition template.	Text
External Applicant Workflow Template ID	This field displays the ID of the Applicant Workflow Template configured for External candidates in the requisition template.	Numeric
External Applicant Workflow Template Title	This field displays the Title of the Applicant Workflow Template configured for external candidates in the requisition template.	Text
EEO Category	This fields displays the EEO (Equal Employment Opportunity) category.	Text
Internal Applicant Workflow Template ID	This field displays the ID of the Applicant Workflow Template configured for internal candidates in the requisition template.	Numeric
Internal Applicant Workflow Template Title	This field displays the Title of the Applicant Workflow Template configured for internal candidates in the requisition template.	Text
Agency Workflow Template ID	This field displays the ID of the Applicant Workflow Template configured for candidates sourced through agency workflow in the requisition template.	Text
Agency Workflow Template Title	This field displays the title of the Applicant Workflow Template configured for candidates sourced through agency workflow in the requisition template.	Text
Employment Type	This field displays the employment type for example permanent or temporary.	Text
Employment Status	This field displays the employment status it indicates whether the job is full time or part time.	Text
Currency	This fields displays the currency of compensation for the requisition.	Text
Compensation Type	This fields displays the compensation type for the requisition.	Text

## Requisition Template > Custom Fields

The possibility to report on custom fields has been added to the Requisition Template section for Reporting 2.0.

## Implementation

Upon implementation, this enhancement is available for all portals with Reporting 2.0.

## Permissions

For more information about Reporting 2.0 permissions, see the following:

- **Permissions in Reporting 2.0** - This provides detailed information about Reporting 2.0 permissions.
- **Permissions List** - This provides the list of permissions and their relationships so that you know which permissions users need to have to create and view reports.

## **Reset Password Workflow Enhancement – Eligible for Rehire**

Prior to this enhancement, if inactive and eligible for rehire candidates wanted to use their old system credentials to log in to the system to apply for a position with a previous employer, they had to answer security questions for which they may no longer have answers.

With this enhancement, instead of answering security questions, inactive and eligible for rehire candidates who want to log in to the system, receive an email with a link to reset their password.

### **Considerations**

The reset password email is sent to the user's registered email ID.

### **Implementation**

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