



## Cornerstone July 2023 What's New

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# What's New for July 2023

# What's New for July '23

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 July '23](#) on page 16 *for additional information.*
- **New Reporting Fields** - This topic provides a list of all reporting fields that are newly added with this release. [See New Report Fields for July '23](#) on page 18 *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 July '23](#) on page 19 *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 release:

## Content Anytime Features

FEATURE NAME	DESCRIPTION
<b>Content Anytime - Q3</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 Q3 refreshes are listed below. Please refer to the <b>2023 Content Refresh Calendar</b> for the timing of refreshes for all of 2023.</p> <ul style="list-style-type: none"><li>• July 14 - July 21: Additions Only</li><li>• August 18 - August 25: Additions Only</li><li>• September 15 - September 22: Additions and Removals</li></ul> <p>New Content Anytime Subscriptions:</p> <ul style="list-style-type: none"><li>• CCA Sustainability</li><li>• CCA Public Sector (Technology)</li></ul>

## Content Studio

FEATURE NAME	DESCRIPTION
<b>Content Studio</b>	Content Studio is Cornerstone's platform for content discovery, curation, and insights.

FEATURE NAME	DESCRIPTION
	<p>Visit the <a href="#">Content Studio playlist</a> to get to know Content Studio and discover how it helps in curating highly effective and engaging content.</p> <p>Visit and follow the <a href="#">Content Studio Updates topic</a> and <a href="#">playlist</a> in the Success Center for the most up to date resources about Content Studio's newly released features and enhancements.</p>

## Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Accessibility Enhancements</b>	Yes	<p>Accessibility enhancements included with the July '23 Release:</p> <ul style="list-style-type: none"> <li>• <b>Learning Accessibility Enhancements</b></li> </ul>
<b>ADP Workforce Now Integration Enhancements</b>	Yes	<p>ADP Single Sign-on and Workforce Now Core Data Inbound Integrations are being renamed.</p> <p>As a result of this change, the corresponding email notifications, validation messages, and starter guides are updated to reflect the changes.</p>
<b>BambooHR User &amp; OU Inbound Integration</b>	Available in Edge Marketplace	<p>The integration between Cornerstone CSX and BambooHR provides a seamless process of creating and updating users and organizational units in CSX. This is achieved through an automated data sync which simplifies data management and eliminates redundant work. BambooHR will remain the system of record for user and OU data.</p> <p><b>This functionality will be released in a post-release patch.</b></p>
<b>Capability Categories</b>	Yes	<p>With this release, organizations can categorize their capabilities using a new Manage Categories page. Organizations can manage a hierarchy of categories, up to five levels deep. A skill can be tagged with up to three categories. Organizations can automatically import categories from the Skills Graph and tag existing Skills Graph skills with a relevant category. Organizations can also create custom categories to meet their organization's specific filtering needs, such as relevant business unit, domain area, relevant geography, etc.</p>
<b>Create &amp; Edit Goals from Cornerstone CSX App</b>	Yes, when using the latest version of the app	<p>With this enhancement, users can now use the Cornerstone CSX app on their mobile devices to perform the following Goal tasks:</p> <ul style="list-style-type: none"> <li>• Create and edit goals</li> <li>• Update goal progress</li> <li>• Add and edit tasks and targets to goals</li> <li>• Update success descriptors</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>• Add and edit goal comments</li> </ul>
<b>Default Email Address Settings - Deactivation Option</b>	Yes	With this release, administrators now have the option to deactivate a default email address. When a default email address is inactive, it cannot be used for newly created emails, but they can remain associated with existing emails and templates. In addition, default email addresses can no longer be deleted unless they are not used in any email template.
<b>Edge Import Framework - Cancel Loads</b>	Yes	With this release, administrators now have the ability to cancel a load from the Load Details page.
<b>Edge Import Learning Load Enhancements</b>	Yes	Edge Import was originally designed to support historical data load use cases. This enhancement provides support for day-to-day bulk data management use cases.
<b>Edge Import Requisition Template Load - Feeds</b>	No, contact Global Customer Support	With this release, data feeds are now available for the Edge Import Requisition Template load. Data feeds allow recruiters to make changes to requisition templates in bulk automatically on an ongoing basis. Recruiters can simply update the templates in a shared location, and the data feed can update the templates in the system, and recruiters do not have to run the data load each time for any changes.
<b>EVO PDF Upgrade</b>	Yes	With this release, CSX has upgraded to EVO PDF version 9.x.
<b>Group Guardrails</b>	Yes	The Group Guardrails enhancement features are designed to make it easier for administrators to edit Group Criteria and avoid costly errors.
<b>Language Pack Updates</b>	Yes	Cornerstone has increased the cadence of CSX Language Pack updates from each release to monthly. Customers can find a list of Language Pack updates posted each month in the <b>Language Pack Updates community in the Success Center</b> .
<b>New Standard Report - Dashboards Details Report</b>	Yes	With this release, a new Dashboards Details standard report is available for administrators to report on metadata related to the dashboards in the portal.
<b>People Matrix - Usability Enhancements</b>	Yes	The People Matrix interface is enhanced to consolidate and optimize space and to make it easier to view data in the matrix.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Permissions Constraints Details</b>	Yes	With this release, administrators have access to a new Permissions Constraints Details page to review a user's current security profile (roles, permissions, constraints) along with a historical audit of permissions, including when roles, permissions, and constraints were added and removed. These new tools aid administrators in ensuring that a user has appropriate access to the system.
<b>Re-naming Cornerstone Learn App in July 2023</b>	Yes, when using the latest version of the app	A unified talent experience for desk and deskless workers is a requirement for many customers looking to manage continuous learning and performance, in the moment. Nearly half of Cornerstone Learning users are also using Cornerstone Performance and would benefit from being able to access goals and other Performance capabilities while in the mobile app. Cornerstone will rename the existing "Learn" App to simply "Cornerstone CSX" App in July 2023. Users of the app will be able to access select Cornerstone Performance features beginning with Goals in the March 2023 release. Additional features will be introduced in 2023 and beyond.
<b>Reporting 2.0 - Calculated Field Enhancement</b>	Yes	With this release, global calculated fields now have visibility restrictions for when the formula references an unpublished (non-global) calculated field. This restriction ensures that when a report is copied by a shared user, the global calculated field remains as a private calculated field when non-global calculated fields are referenced in the formula.
<b>Reporting 2.0 - Display Total Number of "Selected" Units in Shared Flyout</b>	Yes	With this release, when a report owner shares a report by sharing the folder containing a report, the Shared flyout now accurately reflects the number of selected organizational units and users with whom the report is shared, including direct report sharing and folder sharing.
<b>Reporting 2.0 - Report Output Header Update</b>	Yes	With this release, in the header section of the report output, "Generated By" is renamed to "Report Created By." This field populates the report owner's name. This update also includes report headers for reports delivered via email.
<b>Reporting 2.0 - Reporting Fields List UI Improvement</b>	Yes	With this release, if a field is available in Reporting 2.0 but no underlying data tables have been created for the data, the fields appear gray and disabled, identifying that the functionality that corresponds with the field is available in the portal, but no data has been created. Once the newly enabled functionality is used and underlying data tables are created, the fields automatically become selectable in Reporting 2.0.
<b>Reporting 2.0 Delivery Log Standard</b>	Yes	With this release, the Reporting 2.0 Delivery Log standard report now includes all Reporting 2.0 delivery statuses.



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Report - New Status Values</b>		
<b>Reporting 2.0 New Fields - July 2023</b>	Yes	<p>The following additions and updates have been made to Reporting 2.0 fields with this release:</p> <ul style="list-style-type: none"> <li>• <b>Reporting Fields - Capabilities</b></li> <li>• <b>Reporting Fields - Learning</b></li> </ul>
<b>Reporting Fields - Capability Models</b>	Yes	With this enhancement, new Capability Models fields are added to Reporting 2.0.
<b>RTDW Updates to OData v4.0 Delta Objects</b>	Yes	<p>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 <b>RTDW Documentation for Reporting API, RDW, and Data Exporter Community</b>. Join and follow the community to be notified of new objects with Delta support.</p>
<b>RTDW Updates to Reporting API, RDW, Data Exporter and Data Exporter API</b>	Yes	<p>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.</p>
<b>Skills - Top Rated Individuals</b>	Yes	With this release, when viewing the Skill Details flyout for a skill, the flyout now displays the top rated individuals within the organization for the skill.
<b>SOAP API Deprecation in 2023 Q4</b>	Yes	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.
<b>Standard Report - View All Security Roles Enhancement</b>	Yes	With this release, users are now able to run the Security Role - User Permissions Report and Security Role - Audit Report without having the <i>Security Administration - Manage</i> permission. Users must still have the respective report permission to run these reports.
<b>Support "Currency" in Individual Target</b>	Yes	With this release, the Individual Target Edge Import now includes a Currency field. With this field, customers can associate each individual employee with their geographical currency to receive Individual target

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Compensation Edge Import Template</b>		types like bonus or equity. Multiple employees with different currencies can be added in a single template to load Individual target types.
<b>Webhooks (Early Adopter)</b>	No	Webhooks is a new HTTP-enabled feature that enables customers to create a deeper integration into the Cornerstone ecosystem by enabling near real-time access to critical business event data.

## Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Forms Question Bank Field Title – Character Limit Increase</b>	Yes	With this enhancement, the character limit for the Question field is now 500. Now, this field can contain very long questions, questions that may need an explanatory description, and appropriate translation.
<b>e-days Absence Management Integration Enhancement</b>	Yes	With this enhancement, a new toggle, <b>Skip Auto Setup Authorizers</b> , is provided to allow users to bypass the step that automatically sets the employee's manager as their default authorizer.  <b>This feature is not available during UAT and will be available in a future patch release.</b>

## Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Accessibility Enhancements - July 2023</b>	Yes	With this release, Cornerstone is delivering accessibility enhancements that improve the user's ability to access and use the platform.
<b>Admin Compliance Dashboard – Curriculum</b>	Yes	With this enhancement, the Admin Compliance Dashboard gives a quick overview of the versioning process and enables administrators to review the number of compliant and non-compliant learners and the number of learners who received the right version of the training.
<b>Assignment Logic Fix for Versioning with Multiple Dynamic Assignments</b>	Yes	There are scenarios where a user matches the criteria for two dynamic learning assignments that are created one after the other for the same training. In this example scenario, the second assignment does not assign the training because

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<p>Assign New Occurrence is off. Later, the first dynamic assignment becomes inactive.</p> <p>When the training in this scenario is versioned using the dynamic assignment option, the user is now calculated in the Impacted User list and the new version is assigned to the user. Previously, the user was not calculated in the Impacted User list and was not assigned the new version.</p>
<b>Auto-Completion of Videos (Early Adopter)</b>	Yes, in Stage. Self-activation for Production.	This enhancement allows videos to auto-complete without any user involvement after the user has watched the full video. The enhancement supports auto-completion for standalone videos and videos within curricula. When enabled, the auto-completion logic applies to all existing and new videos.
<b>Catalog Search API Enhancements</b>	Yes	With this enhancement, learning objects of training type "Online Content," "Playlist," and "External Content" are now included in the response. This enables organizations to better support integrations with content providers.
<b>Certification Bulk Approval</b>	Yes	The Bulk Approval feature allows for the selection of multiple pending requests so that administrators, certification owners, and approvers can approve certification user approval requests in bulk.
<b>Certification Bypass Approval for Expired Completion Requests</b>	Yes	The administrators and certification owners can disable the requirement for an approval request for the completion of an expired certification. If disabled, the expired certifications do not require completion approvals if the user completes all certification renewal requirements, thus bypassing the approval workflow.
<b>Certification Enrollment and Removal History Enhancements</b>	Yes	<p>The following new functionalities and user interface are added to the Proxy Enrollment for Certification page:</p> <ul style="list-style-type: none"> <li>• Dynamic Re-enrollment and Dynamic Removal Toggles</li> <li>• Include Subordinate</li> <li>• Proxy Enrollment page with new Certification UI</li> <li>• Export Removal History</li> </ul>
<b>Configuration Added to Content Skills Tagging Enablement Page</b>	Yes	With this enhancement, the Content Skills Tagging page now includes a configuration setting that enables administrators to choose whether skills detected from machine learning are automatically tagged to a Learning Object (LO) or only marked as 'Suggested'.
<b>Create Tool Enhancements - Embed Videos</b>	Not available in Stage.	With this enhancement, embed externally hosted videos from the web to quickly create engaging content by leveraging already existing materials.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
	Automatically available in Production upon release.	
<b>Create Tool Enhancements - Personalized Branding</b>	Not available in Stage. Automatically available in Production upon release.	With this enhancement, administrators can change default logos and set primary colors at the portal level to apply to all content. Making changes here automatically applies the logo change to all courses, new and previously published.
<b>Create Tool Enhancements - Quizzes</b>	Not available in Stage. Automatically available in Production upon release.	With this enhancement, users can create interactive quizzing options to allow for more learner engagement throughout the course and knowledge checks which contribute to more effective and efficient learning outcomes.
<b>Curriculum Player 2.0 - Milestone 3 (Open Beta)</b>	Available for self-activation in Stage. Not available in Production.	Curriculum Player 2.0 provides users with a straightforward path to complete their curriculum. The Curriculum Player 2.0 is fine-tuned to provide a modern UI while addressing complex workflows.
<b>Custom Email Localization</b>	Yes	the administrators can localize custom emails without having to set up and maintain custom email templates for every language active in a portal. The system leverages the default language logic and enables a single custom email template for multiple languages. It also allows administrators to change the default language for a custom email.
<b>Deprecation of Course Builder, Module Builder, Asset Importer with the November '23 Release</b>	N/A	Cornerstone has decided to deprecate these products with the November '23 Release. When this occurs, customers will no longer have access to Course Builder, Module Builder, or Asset Importer.
<b>Global Search (Training) - Enhanced Search Default Preference</b>	Yes Upon release, it may take up to 7 days for the update to be	With this enhancement, the default preference for Global Search (Training) is set to Enhanced Search rather than Traditional Search across all portals. Apart from using the Enhanced Search by default, the administrators can change the search engine preference to Traditional Search.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
	present in Stage and Production portals.	<b>This functionality was released in Stage environments June 29. It may take up to seven days from June 29 for this change to take effect.</b>
<b>Hide Legacy Skills Tab on Edit Training Page UI with the November '23 Release</b>	N/A	With this November 2023 release, the Legacy Skills tab will be hidden from the Edit Training section in Course Catalog by default. Administrators can still change this setting to retain the Skills tab on the UI. When the deprecation occurs with the November 2023 release, the legacy “Skills” tab will be hidden from the UI by default.
<b>Learning Administration New UIs Auto Enabled and Legacy UIs Deprecated with the Q3 2024 Release</b>	N/A	The new user interface (UI) learning administration pages will be automatically enabled in production, stage, and pilot portals with the Q3 2024 Release and the legacy user interface pages will no longer be available.
<b>Learning Assignment API - OU Support</b>	Yes	With this enhancement, a new "orgUnits" parameter is available for the Learning Assignment API. This enables organizations to assign training to specific organizational units (OUs).
<b>Learning Assignment API - Remaining Count</b>	Yes	With this enhancement, a new Get Remaining Count API returns the count of remaining user assignments per day for the date provided. This helps manage throttling limits.
<b>Learning Assignment Tool - Relative Recurrence Enhancement (Early Adopter)</b>	Yes, in Stage. Self-activation for Production.	With this enhancement, if dynamically recurring Learning Assignments have the recurrence date set as “Relative” or “Annually”, the Learning Assignment Tool (LAT) assigns the training to users who have surpassed the recurrence date criteria of dynamic assignments but still satisfy the training assignment criteria. The enhancement also enables Learning Assignments to search for all users who have missed the recurrence date of trainings in the past.
<b>Learning Search - Filter Configuration (Early Adopter)</b>	Yes	With this enhancement, administrators can enable the filters which are used in their portals or divisions and disable those filters which are rarely used.
<b>Learning Search – Skills (Capabilities) Filter (Early Adopter)</b>	No, must be enabled in Learning Search Preferences	With this enhancement, the customers who have enabled content tagging or manually updated trainings with Skills (Capabilities) can filter Learning Search results with those skills. The Skills (Capabilities) filter allows learners to find trainings for the Skills (Capabilities) upon which they want to improve.
<b>Reporting Fields - Learning</b>	Yes	With this enhancement, new Learning fields are added to Reporting 2.0.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Stripe Payment Processor - Refunds</b>	Yes, for organizations using the integration	With this enhancement, administrators can now initiate refunds directly using the CSX Extended Enterprise module for payment transactions that were executed via the Stripe Payment gateway. This process does not require manual login to the Stripe account by the administrator. Refunds can be initiated by the user from the CSX user's Transcript page itself if allowed by the Learning Object (LO) settings. For more information, refer to <b>Stripe – Payment Gateway</b> .
<b>Transcript API (Open Beta)</b>	Only available in Stage	<p>With this release, the Transcript API supports the following features:</p> <ul style="list-style-type: none"> <li>• Data APIs (GET): Overview API; Detailed APIs; filters, multi-language support</li> <li>• Request API: Request training; Employee perspective</li> <li>• Assign API: Assign training; Manager and Learning Administrator perspective</li> <li>• Remove API: Remove training; bi-directional</li> </ul>
<b>User Interface Modifications for Learning Administration Pages (Early Adopter)</b>	<p>Yes, in Stage.</p> <p>Self-activation for Production.</p> <p>Automatically enabled for organizations that previously self-activated.</p>	<p>With this enhancement, the following previously delivered user interfaces (UI) are upgraded:</p> <ul style="list-style-type: none"> <li>• ILT Events and Session Administration</li> <li>• ILT Roster</li> <li>• Materials Administration</li> <li>• Course Catalog Administration</li> <li>• Curricula Administration</li> <li>• Deep Link Administration</li> <li>• Training Request Approval</li> </ul> <p>The enhancement also introduces new pages for the following system areas:</p> <ul style="list-style-type: none"> <li>• Certification Administration</li> <li>• Test Engine Administration</li> </ul>
<b>Versioning Redesign Enhancements - General Availability</b>	Yes, in phases.	This enhancement provides new Curriculum versioning workflows for consistent and reliable behavior whenever a Curriculum Child Learning Object (LO) is versioned or whenever a Curriculum structure is modified simultaneously, so that the right users get the right training at the right time while maintaining compliance with respect to tracking training completions.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Webex Meeting Center vILT Integration Upgrade</b>	Available in Edge Marketplace. For customers already using Webex Meeting Center integration, contact Global Customer Support to enable the Edge Tile in Production.	The new Webex Meetings REST API enables seamless integration of Webex Meetings into your websites, apps, and services. Use Webex to schedule meetings, invite meeting attendees, update preferences, and more. The APIs used in the integration is replaced in the existing integration so that the transition for the customer is as smooth as possible.

## Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Bulk Reopen of Performance Review Task Steps by Admin</b>	Enabled by administrator	With this enhancement, a reviewer can reopen a review step for one or more reviewees at the same time, provide a reason for reopening the step, and view the updated due date for the reopened step.
<b>Check-Ins Insights</b>	Yes	With this enhancement, a new Check-Ins Insights page is provided that contains an Upcoming Meetings section, a Notifications section, and a Follow-Ups section that provides notifications to managers and employees about meetings and follow-ups.
<b>Check-Ins Mobile Enhancements</b>	Yes	The new Check-Ins new mobile enhancements allow users to easily access all meeting features and resources
<b>Display Goal Assignment Details</b>	Yes	With this enhancement, goal assignment details now appear in the goals Modification History.
<b>Review Task Central – General Availability</b>	Activated by administrator	Review Task Central provides reviewers an easy way to view and work on all their assigned performance review steps in one location. This functionality is now General Availability (GA).
<b>Skills in Performance Reviews – General Availability</b>	Enabled by administrator	With this enhancement, a new Skills Review section is added to Performance Reviews. In the Skills Review section, users can: <ul style="list-style-type: none"> <li>• Update the employee's skills profile</li> <li>• View and launch content that is tied to a skill</li> </ul>



FEATURE NAME	AUTOMATIC ALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>Rate skill proficiency</li> <li>Add custom questions to the new Skill Assessment section</li> </ul> <p>This functionality is now General Availability (GA).</p>

## Recruiting Features

FEATURE NAME	AUTOMATIC ALLY ENABLED?	DESCRIPTION
<b>Application Custom Fields in Recruiting Emails</b>	Yes	With this enhancement, recruiters can now add a tag to application custom fields and insert application custom field tag into email templates. Application custom field tags automate the process of sharing application information to reduce the recruiter's workload and ensures that the shared data is standardized and reliable.
<b>Candidate Skills Match (Open Beta)</b>	No	With this release, on the Manage Candidates page, a new "Candidate Score" field is provided. The candidate skills match score is calculated by matching a candidate's profile against the requisition's job description. Additionally, recruiters can also check for missing and matching skills.
<b>Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '23 Release</b>	N/A	The ability to perform Requisition Template data loads using DLW will be deprecated with the November '23 Release.
<b>Display Candidate Documents on Universal Profile</b>	Yes	With this enhancement, once a candidate is hired, documents uploaded to a candidate's profile by a recruiter, or documents uploaded to the application by the candidate, are automatically transferred the new hire's Universal Profile Snapshot Document tab.
<b>Display Org Units to Approvers of Requisition Requests</b>	Yes	With this enhancement, requisition request Division and Location information is now visible on the Hiring Dashboard and the Universal Profile Actions/Requests page. This allows approvers to immediately see if they need to take action on a requisition request.
<b>Extend Bulk Selection on Manage Candidates Page – General Availability</b>	Yes	With this enhancement, recruiters can select and perform actions for 20 or 50 candidates per page.  This functionality is now General Availability (GA).



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Google is Deprecating Standard Universal Analytics on July 1, 2023</b>	N/A	Google is deprecating standard Universal Analytics on July 1, 2023. A Knowledge Article has been created with guidelines to understand how to migrate from Google Universal Analytics to Googly Analytics 4 using the Google Tag Manager.
<b>Interview Scheduling – Usability Enhancements</b>	Yes	With this release, a new selectable "Virtual" option is available to indicate the interview type, the formatting for comments added by a recruiter is respected for readability, and it is now possible to share a candidate's phone number in an additional email.
<b>Manage Applicants Deprecation with the Q1 2024 Release</b>	N/A	<p>The Manage Applicants deprecation ensures all users benefit by using Manage Candidates enhanced, mobile-friendly user experience to quickly and effectively assess and manage all their candidates through the hiring process.</p> <p>Prior to deprecating the Manage Applicants user interface (UI) in Q1 2024, Cornerstone will bring the most commonly used workflows to Manage Candidates to reduce complexity, making the Manage Candidates page simpler to use.</p>
<b>Manage Candidates Add/Move to Requisition Email Trigger Update</b>	Yes	With this enhancement, when adding or moving a candidate to a new requisition from the Manage Candidates page, the Application Confirmation email is no longer triggered.
<b>Send Email from Manage Candidates and Templates Enhancements</b>	Yes	<p>With this enhancement, candidate communication is enhanced by:</p> <ul style="list-style-type: none"> <li>• Allowing administrators to add Reply-To Address and Reply-To Display Name fields to a candidate email template.</li> <li>• Allowing recruiters to provide an appropriate Reply-to address when contacting a candidate and attach documents to the email when necessary.</li> <li>• Allowing candidates to reply to a generic or dedicated Reply-to address provided, instead of the recruiter's personal email address.</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>• Allowing a recruiter to and view and respond to a candidates messages even if another recruiter started the conversation.</li> </ul>
<b>Update Compliance Question “Voluntary Self-Identification of Disability Form”</b>	Yes	<p>Customers operating in the US and following Office of Federal Contract Compliance Programs (OFCCP) compliance requirements must ensure that the set of compliance questions is reflecting the latest directives of the US Government.</p> <p>This enhancement updates the text of the “Voluntary Self-Identification of Disability Form” so that the deadline of July 25, 2023 is met.</p>

# New and Enhanced Permissions for July '23

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

## New Permissions

The following permissions are new for the July '23 release:

### Core/General

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Categories	Grants access to the Capability Categories functionality, where administrators can create and manage capability categories. This permission cannot be constrained. This is an administrator permission.	Core Administration
Dashboards Details Report	Grants access to view the Dashboards Details Report, which displays details related to the dashboards in their portal, such as the dashboard creator and with whom the dashboard is shared. This permission cannot be constrained. This is an administrator permission.	Reports - System
Edge Endpoints - Create Secret	Grants access to create the secret key for Edge Endpoints used with Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Endpoints - Manage	Grants access to view, create, edit, and verify Edge Endpoints used with Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Webhooks - Manage	Grants access to view, create, and edit Edge Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Webhooks - Start/Stop	Grants access to start and stop Edge Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Webhooks - View	Grants access to view Edge Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge

User Permission and Constraint Details - View	Grants ability to access the Permissions Constraints Details page for a user. This permission also grants ability to see the Permissions Constraints Details link on the Permissions page. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration
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### Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Admin Compliance Dashboard - View	Grants ability to view the new Admin Compliance Dashboard. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
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Certification - Bulk Approval - Manage	Grants the ability to bulk approve certification approval requests. If the administrator or certification owner does not have this permission, the Approve button for bulk approval will not display on the Manage Pending Requests page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
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### Performance

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Performance Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance. This is an administrator permission.	Performance - Administration
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### Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Applicants - View Candidate Matching Score	Grants ability to view a candidate's Matching Score on the Manage Candidates page. This permission is not constrained.	Recruiting
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# New Report Fields for July '23

This page provides the master list of new report fields for this release.

## Core/General

FIELD NAME	SECTION
Capability Model ID	Capability Model
Capability Model Name	Capability Model
Capability Model Description	Capability Model
Capability Model OUs	Capability Model
Capability Model OU Include Subordinates	Capability Model
Capability Target	Capability Model
Capability Target OUs	Capability Model

## Learning

FIELD NAME	SECTION
Session Cancellation Reason (training)	Training > Training Details
Session Cancellation Comment (training)	Training > Training Details
Cancellation Reason (transcript) (renamed from Cancellation Reason)	Transcript
Cancellation Reason Comment (transcript) (renamed from Cancellation Reason Comment)	Transcript

# Release Notes Updates for July '23

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

Changes made on 22 September 2023:

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Versioning Redesign Enhancements - General Availability	Versioning Redesign Enhancements - General Availability	Added a 5th use case under Use Cases section.

Changes made on 8 September 2023:

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '23 Release	Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '23 Release	Added the following update: <b>The Data Load Wizard (DLW) Requisition Template load will not be deprecated with November '23 release. The Requisition Template Status load will be available in Edge Import before deprecating the DLW Requisition Template load.</b>

Changes made on 28 July 2023:

## Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
e-days Absence Management Integration Enhancement	e-days Absence Management Integration Enhancement	Updated Implementation section as follows: This is a backend setting and cannot be enabled on the UI. Please open a GCS case to enable the setting.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Auto-Completion of Videos (Early Adopter)	Auto-Completion of Videos (Early Adopter)	Considerations: The percentage viewed to achieve a completion cannot be configured. Once the video's progress time in the progress bar reaches the video duration, the video is automatically marked as complete.
Certification Bulk Approval	Certification Bulk Approval	Updated the whole release note. The administrators are usually certification owners unless they grant relevant

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		permission to another user, then they become certification owner. Corrected the usage of term "Certification Owner".
Certification Enrollment and Removal History Enhancements	Certification Enrollment and Removal History Enhancements	Updated Export Removal History section.

Changes made on 21 July 2023:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import Requisition Template Load - Feeds	Edge Import Requisition Template Load - Feeds	Updated the implementation information.
Reporting 2.0 - Reporting Fields List UI Improvement	Reporting 2.0 - Reporting Fields List UI Improvement	Added a note about when sections will appear gray, including possible example sections for testing.
Skills - Top Rated Individuals	Skills - Top Rated Individuals	Added information for administrators to disable this feature if necessary.
Standard Report - View All Security Roles Enhancement	Standard Report - View All Security Roles Enhancement	Updated introductory paragraphs.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Assignment Logic Fix for Versioning with Multiple Dynamic Assignments	Assignment Logic Fix for Versioning with Multiple Dynamic Assignments	This is a new item.
Versioning Redesign Enhancements - General Availability	Versioning Redesign Enhancements - General Availability	Updated the implementation information. This is now a phased rollout.

Changes made on 14 July 2023:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import Learning Load Enhancements	Edge Import Learning Load Enhancements	Removed "Library" from the list of supported load types in the LO Availability Load - Additional LO Types section because the Library load type has been deprecated.
Skills - Top Rated Individuals	Skills - Top Rated Individuals	Updated the Implementation section to reflect the new preference.
Skills - Top Rated Individuals	Skills Profile Preferences - Enable or Disable Top Rated Individuals	This is a new topic.
Permissions Constraints Details	Permissions Constraints Details Page	<p>Noted that for the Permission History, no historical data is available to system defined roles, such as Manager, Approver, and Default Role for Every User in the System, unless permissions were manually added to these roles.</p> <p>For the User Constraint History Details section, user constraints auditing data are currently not captured in Production and Pilot environments. This will be enabled in Q3. User constraint historical data will only be available from the point auditing is enabled. That is, no user constraint actions (add or remove) that occurred prior to auditing being enabled will be captured in this table.</p>

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Admin Compliance Dashboard - Curriculum	Admin Compliance Dashboard - Curriculum	<ol style="list-style-type: none"> <li>Added a new point under Consideration: If a Curriculum is not assigned to an intended user, then the overall Curriculum assignment is displayed as a failure in the Assignment Failure Widget.</li> <li>Edited the first FAQ.</li> </ol>
Learning Assignment Tool - Relative Recurrence Enhancement (Early Adopter)	Learning Assignment Tool - Relative Recurrence Enhancement (Early Adopter)	New points added under consideration: scenarios within the scope of recurrence and scenario out of scope of the recurrence.



## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Bulk Reopen of Performance Review Task Steps by Admin	Bulk Reopen of Performance Review Task Steps by Admin	Updated the Implementation: This functionality is available by default if Review Task Central is enabled.

Changes made on 7 July 2023:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting 2.0 - Calculated Field Enhancement	Reporting 2.0 - Calculated Field Enhancement	Updated the description of the previous behavior and the description of what happens when a user tries to publish a calculated field globally that references a non-global calculated field.

## Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
e-days Absence Management Integration Enhancement	e-days Absence Management Integration Enhancement	Updated the implementation information and added that this functionality is available for UAT 3.

Changes made on 30 June 2023:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Webhooks (Early Adopter)	Webhooks (Early Adopter)	Updated the enablement information.
Reporting 2.0 - Reporting Fields List UI Improvement	Reporting 2.0 - Reporting Fields List UI Improvement	<p>Noted that this enhancement does not apply to custom fields because data tables are automatically created even though data may not be available for the field.</p> <p>Noted that fields become selectable when underlying data tables are created, regardless of whether data is populated in the table.</p>

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Global Search (Training) - Enhanced Search Default Preference	Global Search (Training) - Enhanced Search Default Preference	This functionality was released in Stage environments June 29. It may take up to seven days from June 29 for this change to take effect.

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Update Compliance Question "Voluntary Self-Identification of Disability Form"	Update Compliance Question "Voluntary Self-Identification of Disability Form"	Updated the Notes section to provide specific information related to Reporting 2.0.
<ul style="list-style-type: none"> <li>Manage Candidates Add/Move to Requisition Email Trigger Update</li> <li>Extend Bulk Selection on Manage Candidates Page - General Availability</li> <li>Send Email from Manage Candidates and Templates Enhancements</li> <li>Candidate Skills Match (Open Beta)</li> </ul>	<ul style="list-style-type: none"> <li>Manage Candidates Add/Move to Requisition Email Trigger Update</li> <li>Extend Bulk Selection on Manage Candidates Page - General Availability</li> <li>Send Email from Manage Candidates and Templates Enhancements</li> <li>Candidate Skills Match (Open Beta)</li> </ul>	Added link to updated Managed Candidates Starter Guide.

Changes made on 23 June 2023:

## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Candidate Skills Match (Open Beta)	Candidate Skills Match (Open Beta)	Updated the feedback link to: Feedback goes to Beta Community <a href="#">Thread for Feedback and Questions</a> page.
Bulk Reopen of Performance Review Task Steps by Admin	Bulk Reopen of Performance Review Task Steps by Admin	Updated the Implementation: To enable this functionality, contact Global Customer Support after Task Central is enabled.

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Candidates Add/Move to Requisition Email Trigger Update	Manage Candidates Add/Move to Requisition Email Trigger Update	New enhancement

# 28 July Patch Release Functionality

## What's New for the 28 July 2023 Patch Release

The following is released along with the 14 April 2023 patch release:

MODULE	FEATURE	DESCRIPTION
Cornerstone HR	Forms Question Bank Field Title – Character Limit Increase	For Question Bank questions, the character limit for the Question field is now 500.
Learning	Versioning Redesign Enhancements - General Availability	Available in the following swim lanes: FRA SL1 (AWS), CDG SL1 (AWS), UK SL4 (AWS)

## Forms Question Bank Field Title – Character Limit Increase

Prior to this enhancement, for Question Bank questions, the character limit for the Question field was 250 characters.

With this enhancement, the character limit for the Question field is now 500. Now, this field can contain very long questions, questions that may need an explanatory description, and appropriate translation. This character limit increase includes spaces.

**Note:** *This enhancement applies to Form Management only.*

This character limit increase applies to all of the following question types:

- Checkbox
- Date Picker
- Dropdown
- Numeric
- Radio Buttons
- Text

### How Does this Enhancement Benefit My Organization?

Customers can easily use the Question Bank fields without shortening the questions or trying to divide them into separate fields.

### Considerations

Existing questions can be adjusted to the higher character limit only if they are not already used in forms.

### Implementation

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

### Permissions

The following existing permissions apply to this functionality:

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

## Versioning Redesign Enhancements - General Availability - July 28 Patch

Prior to this enhancement, preventing erroneous versioning and assignment of training to end users was costly for organizations which resulted in extra administrative time for troubleshooting, leading to compliance and training completion tracking issues.

This enhancement provides new Curriculum versioning workflows for consistent and reliable behavior whenever a Curriculum Child Learning Object (LO) is versioned or whenever a Curriculum structure is modified simultaneously, so that the right users get the right training at the right time while maintaining compliance with respect to tracking training completions.

The enhancement enables enhanced performance optimizations for back-to-back versioning including administrator and Child LO versioning for Curriculum.

The new versioning workflows are now available in the General Availability for all customers in the July 2023 Release.

With the July 28 patch, this functionality is enabled for the following swimlanes:

- FRA SL1 (AWS)
- CDG SL1 (AWS)
- UK SL4 (AWS)

See [Versioning Redesign Enhancements - General Availability](#) on page 222 *for additional information.*

# 25 August Patch Release Functionality



# What's New for the 25 August 2023 Patch Release

The following is released along with the 25 August 2023 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	Versioning Redesign Enhancements - General Availability	Available in the following swim lanes: UK SL2 (AWS), US SL1 (AWS), UK SL3 (AWS)

## Versioning Redesign Enhancements - General Availability

Prior to this enhancement, preventing erroneous versioning and assignment of training to end users was costly for organizations which resulted in extra administrative time for troubleshooting, leading to compliance and training completion tracking issues.

This enhancement provides new Curriculum versioning workflows for consistent and reliable behavior whenever a Curriculum Child Learning Object (LO) is versioned or whenever a Curriculum structure is modified simultaneously, so that the right users get the right training at the right time while maintaining compliance with respect to tracking training completions.

The enhancement enables enhanced performance optimizations for back-to-back versioning including administrator and Child LO versioning for Curriculum.

The new versioning workflows are now available in the General Availability for all customers in the July 2023 Release.

### How Does this Enhancement Benefit My Organization?

- Administrators who can version Curricula can see if the versioning is still in progress via an icon if versioning happened through administrator structure changes.
- Administrator overhead to troubleshoot is significantly reduced as this avoids and prevents erroneous versioning and assignment of training to end users for back-to-back scenarios.
- Robust and reliable workflows make sure that the users are always assigned the right version of the Curriculum or Curriculum Child LOs to remain compliant.
- Provides improved reliability, scalability, and quality with system versioning flows.

### Use Cases

**Use Case 1:** Materials or online course LOs belonging to the same Curriculum are versioned back-to-back. It creates the latest version of all Materials or Online Course LOs in the latest version of the Curriculum (Child LO Versioning).

**Use Case 2:** Material M1v1 is part of Curriculum C1v1 and M1v1 is versioned to M1v2. However, if Material M3v1 is added to Curriculum C1v1 via administrator structure changes causing the Curriculum to version, then the Curriculum will have M1v2 and M3v1 in the latest Curriculum version, thus maintaining consistency.

**Use Case 3:** Material M1v1 is part of Curriculum C1v1 and M1v1 is versioned to M1v2. However, if M1v1 is removed from C1v1 via administrator structure changes, then the Curriculum will not get versioned, as Child LO Material M1v1 will be removed from the Curriculum structure.

**Use Case 4:** Curriculum C1v1 is a child LO under the Parent Curriculum C2v1. If we version Material M1v1 to M1v2 under C1v1, triggering the child LO versioning flow, C1v1 will be versioned to C1v2, and C2v1 gets versioned to C2v2. But if we version C1v2 to C1v3 via an administrator structure change, then C2v2 remains C2v2 and no parent Curriculum versioning happens.

### Considerations

- This enhancement supports only versioning that occurs due to administrator structure changes or Child LO versioning.
- This enhancement is specific to the back-to-back versioning scenarios that lead to versioning inconsistencies for curricula.

## Frequently Asked Questions (FAQs)

What happens when a child LO is removed from the Curriculum structure by an administrator and at the same time child LO versioning requests occur for the same LO?

In this case, the Curriculum versioning will not happen as the Child LO no longer exists in the Curriculum Structure.

## Implementation

Enhanced Versioning will be enabled in phases based on the customer's swimlane.

SWIMLANE	DEPLOYMENT DATE
AU SL1 (AWS)	21 July 2023
CDG SL4 (AWS)	21 July 2023
JP SL1 (AWS)	21 July 2023
FRA SL1 (AWS)	28 July 2023
CDG SL1 (AWS)	28 July 2023
UK SL4 (AWS)	28 July 2023
LAX-SL1	11 August 2023
LAX-SL2	11 August 2023
LAX-SL4	18 August 2023
LAX-SL5	18 August 2023
UK SL1 (AWS)	18 August 2023
UK SL2 (AWS)	25 August 2023
US SL1 (AWS)	25 August 2023
UK SL3 (AWS)	1 September 2023
US SL2 (AWS)	8 September 2023
LAX-SL3	15 September 2023

# 08 September Patch Release Functionality

# What's New for the 08 September 2023 Patch Release

The following is released along with the 08 September 2023 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	Versioning Redesign Enhancements - General Availability	Available in the following swim lanes: September 8-US SL2 (AWS), September 15-LAXSL3.

## Versioning Redesign Enhancements - General Availability

Prior to this enhancement, preventing erroneous versioning and assignment of training to end users was costly for organizations which resulted in extra administrative time for troubleshooting, leading to compliance and training completion tracking issues.

This enhancement provides new Curriculum versioning workflows for consistent and reliable behavior whenever a Curriculum Child Learning Object (LO) is versioned or whenever a Curriculum structure is modified simultaneously, so that the right users get the right training at the right time while maintaining compliance with respect to tracking training completions.

The enhancement enables enhanced performance optimizations for back-to-back versioning including administrator and Child LO versioning for Curriculum.

The new versioning workflows are now available in the General Availability for all customers in the July 2023 Release.

### How Does this Enhancement Benefit My Organization?

- Administrators who can version Curricula can see if the versioning is still in progress via an icon if versioning happened through administrator structure changes.
- Administrator overhead to troubleshoot is significantly reduced as this avoids and prevents erroneous versioning and assignment of training to end users for back-to-back scenarios.
- Robust and reliable workflows make sure that the users are always assigned the right version of the Curriculum or Curriculum Child LOs to remain compliant.
- Provides improved reliability, scalability, and quality with system versioning flows.

### Use Cases

**Use Case 1:** Materials or online course LOs belonging to the same Curriculum are versioned back-to-back. It creates the latest version of all Materials or Online Course LOs in the latest version of the Curriculum (Child LO Versioning).

**Use Case 2:** Material M1v1 is part of Curriculum C1v1 and M1v1 is versioned to M1v2. However, if Material M3v1 is added to Curriculum C1v1 via administrator structure changes causing the Curriculum to version, then the Curriculum will have M1v2 and M3v1 in the latest Curriculum version, thus maintaining consistency.

**Use Case 3:** Material M1v1 is part of Curriculum C1v1 and M1v1 is versioned to M1v2. However, if M1v1 is removed from C1v1 via administrator structure changes, then the Curriculum will not get versioned, as Child LO Material M1v1 will be removed from the Curriculum structure.

**Use Case 4:** Curriculum C1v1 is a child LO under the Parent Curriculum C2v1. If we version Material M1v1 to M1v2 under C1v1, triggering the child LO versioning flow, C1v1 will be versioned to C1v2, and C2v1 gets versioned to C2v2. But if we version C1v2 to C1v3 via an administrator structure change, then C2v2 remains C2v2 and no parent Curriculum versioning happens.

### Considerations

- This enhancement supports only versioning that occurs due to administrator structure changes or Child LO versioning.
- This enhancement is specific to the back-to-back versioning scenarios that lead to versioning inconsistencies for curricula.

## Frequently Asked Questions (FAQs)

What happens when a child LO is removed from the Curriculum structure by an administrator and at the same time child LO versioning requests occur for the same LO?

In this case, the Curriculum versioning will not happen as the Child LO no longer exists in the Curriculum Structure.

## Implementation

Enhanced Versioning will be enabled in phases based on the customer's swimlane.

SWIMLANE	DEPLOYMENT DATE
AU SL1 (AWS)	21 July 2023
CDG SL4 (AWS)	21 July 2023
JP SL1 (AWS)	21 July 2023
FRA SL1 (AWS)	28 July 2023
CDG SL1 (AWS)	28 July 2023
UK SL4 (AWS)	28 July 2023
LAX-SL1	11 August 2023
LAX-SL2	11 August 2023
LAX-SL4	18 August 2023
LAX-SL5	18 August 2023
UK SL1 (AWS)	18 August 2023
UK SL2 (AWS)	25 August 2023
US SL1 (AWS)	25 August 2023
UK SL3 (AWS)	1 September 2023
US SL2 (AWS)	8 September 2023
LAX-SL3	15 September 2023

# 22 September Patch Release Functionality



# What's New for the 22 September 2023 Patch Release

The following is released along with the 22 September 2023 patch release:

MODULE	FEATURE	DESCRIPTION
Core	BambooHR User & OU Inbound Integration	The integration is now available.

## BambooHR User & OU Inbound Integration

The integration between Cornerstone CSX and BambooHR provides a seamless process of creating and updating users and organizational units in CSX. This is achieved through an automated data sync which simplifies data management and eliminates redundant work. BambooHR will remain the system of record for user and OU data.

This is a one-way integration from BambooHR to CSX. The integration runs nightly at a pre-defined schedule for both OU and user syncs and can also be triggered ad hoc.

### Implementation

Upon release, a new tile will be available in Edge Marketplace that allows customers to install, configure, and enable the integration.

Configuration details will be provided in the starter guide.

### 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 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

## Content Anytime - Q3

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 Q3 refreshes are listed below. Please refer to the [2023 Content Refresh Calendar](#) for the timing of refreshes for all of 2023.

- July 14 - July 21: Additions Only
- August 18 - August 25: Additions Only
- September 15 - September 22: Additions and Removals

New Content Anytime Subscriptions:

- CCA Sustainability
- CCA Public Sector (Technology)

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.

Monthly "Content Refresh: What's New?" webinars are hosted by the Customer Success team. You can register [here](#) and access past webinar recordings in the [Content Refresh: What's New](#) folder in the CSC Content Community.

# Content Studio

Content Studio is Cornerstone's platform for content discovery, curation, and insights.

Visit the [Content Studio playlist](#) to get to know Content Studio and discover how it helps in curating highly effective and engaging content.

Visit and follow the [Content Studio Updates topic](#) and [playlist](#) in the Success Center for the most up to date resources about Content Studio's newly released features and enhancements.

*See [Content Studio - Overview](#).*

**Core/General**

## Capabilities Enhancements

# Capability Categories

## Capability Categories - Overview

With this release, organizations can categorize their capabilities using a new Manage Categories page. Organizations can manage a hierarchy of categories, up to five levels deep. A skill can be tagged with up to three categories. Organizations can automatically import categories from the Skills Graph and tag existing Skills Graph skills with a relevant category. Organizations can also create custom categories to meet their organization's specific filtering needs, such as relevant business unit, domain area, relevant geography, etc.

## How Does this Enhancement Benefit My Organization?

Capability Categories allow administrators to categorize their capabilities into a hierarchical list of categories. This can facilitate skill management by filtering skills by business unit, functional area, vertical, or any other relevant categorization in the Capability Library.

## Implementation

This functionality is automatically enabled for all organizations.

Upon release, the new *Capability Categories* permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

## Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Categories	Grants access to the Capability Categories functionality, where administrators can create and manage capability categories. 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
Capability Library - Edit	Grants the ability to create, edit, and copy capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Library - Manage	Grants the ability to create, edit, copy, delete, import, and approve capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration



## Manage Categories

The Manage Categories page enables administrators to create and manage capability categories. Capability categories allow administrators to categorize their capabilities into a hierarchical list of categories. This can facilitate skill management by filtering skills by business unit, functional area, vertical, or any other relevant categorization in the Capability Library.

To access the Manage Categories page, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > CAPABILITY CATEGORIES](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Categories	Grants access to the Capability Categories functionality, where administrators can create and manage capability categories. This permission cannot be constrained. This is an administrator permission.	Core Administration

The screenshot shows the 'Manage Categories' page. At the top left is the title 'Manage Categories'. To its right is a search box labeled 'Search Category' with a magnifying glass icon. Further right is a blue 'Create' button. Below these elements is a list of categories. The first category is 'Business Management', which is expanded to show a sub-list: 'Business Analytics', 'Funding', 'Investment Portfolio', and 'Risk Assessment'. Below this sub-list are 'Cultural Studies', 'Cyber Security', 'Finance Analytics and Management', and 'Health Technology'. Each category and sub-category has a three-dot menu icon to its right.

## Search Categories

To search for a category, enter the keywords in the search field and press the Enter key or select the magnifying glass icon. The page displays all categories that match the search terms.

## Create a Category

To create a capability category, select the **CREATE** button. [See Create a Capability Category](#) on page 48 *for additional information*.

## Edit a Category

To edit a capability category, select the three-dot menu for the category and select **Edit**. [See Create a Capability Category](#) on page 48 *for additional information*.

## Deactivate or Activate a Category

To deactivate an active capability category, select the three-dot menu for the category and select **Deactivate**. Deactivated categories can still be used by administrators, but they be hidden from end users when they are made visible on the Skills Profile in a future release.

To activate a deactivated capability category, select the three-dot menu for the category and select **Activate**.

If a parent category is activated or deactivated, all subcategories are also activated or deactivated. If a parent category is inactive, the Activate option is not available for subcategories.

## Delete a Category

To delete a capability category, select the three-dot menu for the category and select **Delete**. This option is only available if the category does not have any subcategories. [See Delete a Capability Category](#) on page 50 *for additional information*.

## Expand a Hierarchy

If a category contains subcategories, an arrow appears next to the category name. Select the arrow to expand the hierarchy and view the subcategories. Subcategories appear indented.

## Create a Capability Category

Capability categories allow administrators to categorize their capabilities into a hierarchical list of categories. This can facilitate skill management by filtering skills by business unit, functional area, vertical, or any other relevant categorization in the Capability Library.

To create a capability category, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > CAPABILITY CATEGORIES](#). Then, select the **CREATE** button.

To edit a capability category from the Manage Categories page, select the three-dot menu for the category and select **Edit**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Categories	Grants access to the Capability Categories functionality, where administrators can create and manage capability categories. This permission cannot be constrained. This is an administrator permission.	Core Administration

### Create Category ✕

**\* Name**

0 / 250

**Parent Category**  
This category can be tagged to a parent category with similar properties

### Name

Enter a name for the category. The category name will be visible to administrators when creating capabilities. This field is mandatory.

## **Parent Category**

When creating categories in a hierarchy, you can select the parent category for the category you are creating. This is optional. If no parent category is selected, then the category is created at the top level of the category hierarchy.

Up to five category levels can exist within the category hierarchy.

## **Save or Cancel**

Select **SAVE** to create the category. Select **CANCEL** to discard the changes.

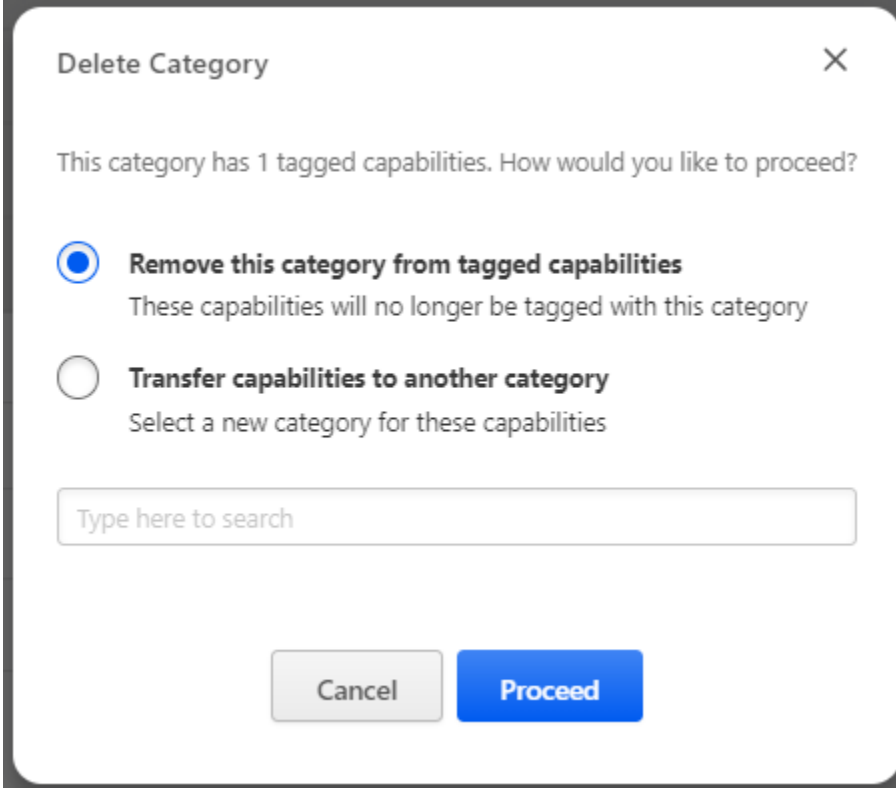
## Delete a Capability Category

Administrators can delete a capability category if the category does not have any subcategories. When a category is deleted, it cannot be restored.

To delete a capability category, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > CAPABILITY CATEGORIES](#). Then, select the three-dot menu for the category and select **Delete**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Categories	Grants access to the Capability Categories functionality, where administrators can create and manage capability categories. This permission cannot be constrained. This is an administrator permission.	Core Administration



The image shows a 'Delete Category' dialog box with a close button (X) in the top right corner. The main text asks, 'This category has 1 tagged capabilities. How would you like to proceed?'. There are two radio button options: 'Remove this category from tagged capabilities' (which is selected) and 'Transfer capabilities to another category'. Below the second option is a search input field with the placeholder text 'Type here to search'. At the bottom, there are two buttons: 'Cancel' and 'Proceed'.

If the category that is being deleted is associated with one or more capabilities, administrators must determine how to update the associated capabilities. The following options are available:

- Remove this category from tagged capabilities - Select this option to disassociate the category from the skills without selecting a replacement category.
- Transfer capabilities to another category - Select this option to replace the deleted category with another category. When this option is selected, you must then specify the replacement category.

Select **PROCEED** to delete the category and update the associated capabilities according to the selected option.

## Create Capability - Capability Categories

When creating or editing a capability, administrators can associate the capability with categories.

A new Categories field is now available. In this field, enter the name of a category. Each capability can be associated with up to three categories.

When a category is selected, it is displayed below the Categories field.

To create a capability from the Capabilities Library, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > LIBRARY](#). Then, select the **CREATE** button.

To edit a capability from the Capabilities Library, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > LIBRARY](#). Then, select the **Edit** link to the right of the appropriate capability.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants the ability to create, edit, and copy capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Library - Manage	Grants the ability to create, edit, copy, delete, import, and approve capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration

## Create Capability



Capabilities describe what a person can do or what they know. Capabilities in your library can be used across your portal in various places like Learning, Careers, and Performance.

Name

0 / 250

Description

0 / 2000

Categories

A capability can be assigned up to 3 categories.

0/3 Categories

Save Draft

Publish

General Settings

## General Settings

Capabilities describe what someone can do or what they know. Competencies, skills, knowledge, strengths and abilities are all types of capabilities.

Capability ID	Created	Modified
SKL-1284	3/30/2022 by Cornerstone Admin	6/21/2022 by Cornerstone Admin

\* Name

marketing analytics

19 / 250

Description

The field of market analysis and research and its particular research methods.

78 / 2000

Categories

A capability can be assigned up to 3 categories.

Type here to search

0/3 Categories

Cancel

Save



## Capability Library - Capability Categories

The Capability Library is enhanced to support capability categories.

- A Category column is now available. This column displays any categories associated with the capability.
- The Created column is removed.
- When filtering capabilities, the Filters flyout now includes a Category search field. Administrators can type a category to view capabilities associated with the selected categories. Administrators can select the **Include child categories** option to view capabilities associated with the selected category and any of the category's subcategories.

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

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants the ability to create, edit, and copy capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Library - Manage	Grants the ability to create, edit, copy, delete, import, and approve capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration

Status	ID	Name	Categories	Source	Modified	
Active	SKL-1169	statistical analysis software	Data science	Cornerstone Skills Graph	6/22/2023 by Cornerstone Admin	<a href="#">Edit</a>   ...
Active	SKL-1168	industrial products	Business	Cornerstone Skills Graph	6/22/2023 by Cornerstone Admin	<a href="#">Edit</a>   ...
Active	SKL-1167	branding	Marketing	Cornerstone Skills Graph	6/22/2023 by Cornerstone Admin	<a href="#">Edit</a>   ...

## Filters



Clear All

Select All

### Category

Include child categories

### Status

Draft

Active

Inactive

### Source

Cornerstone Application

Cornerstone Skills Graph

Edge Import

Legacy Universal Profile Skills

### Linked Skills

Linked

Not Linked

Show Results

## People Matrix - Usability Enhancements

The People Matrix interface is enhanced to consolidate and optimize space and to make it easier to view data in the matrix.

### Pagination

Previously, the People Matrix would display up to 1,000 users in a single page view.

With this release, the People Matrix displays up to 50 users in a single page view. Pagination is added to navigate between pages of users. If the viewer sorts the list of users, the entire list is resorted based on the criteria, and the viewer is returned to the first page.

### Filter Enhancements

Previously, all filters on the People Matrix were displayed on the page.

With this release, all filters on the People Matrix except for the employee search are moved to a Filters flyout. A new Filters toggle is available on the People Matrix page which opens the Filters flyout. The Filters flyout displays filters based on which content is being viewed in the People Matrix.

The Rating Source drop-down filter is moved to the upper-right corner of the matrix. The Filter toggle appears to the right of the Rating Source drop-down filter.

Which filter criteria are available in the flyout is determined by which data is being viewed in the People Matrix.

- When the rating source is Declarations Only, Skill Name and Declaration Status filters are available.
- When the rating source is not Declarations Only, Skill Name and Proficiency Level filters are available.

The image shows a 'Filters' dialog box with a close button (X) in the top right corner. It contains two main sections: 'Skills' and 'Proficiency Levels'. The 'Skills' section has a dropdown menu currently displaying 'data analysis'. The 'Proficiency Levels' section has five radio button options: '1 - Novice', '2 - Advanced Beginner', '3 - Competent', '4 - Proficient', and '5 - Master'. The '3 - Competent' option is selected, indicated by a blue checkmark in the radio button. At the bottom of the dialog, there are three buttons: 'Clear' (in blue text), 'Cancel' (in a white button with a blue border), and 'Save' (in a solid blue button).

## Legend Enhancements

Previously, the legend was always displayed on the People Matrix page.

With this release, the legend details can be hidden with a toggle.

- When a Proficiency Target Level is defined for the matrix and the default rating source is Declarations Only, the Overall Skill and Training Score legend is displayed, and the Declaration Status legend is collapsed.
- When a Proficiency Target Level is defined for the matrix and the default rating source is not Declarations Only, the Overall Skill and Training Score legend is displayed, and the Proficiency Level legend is collapsed.
- When a Proficiency Target Level is not defined for the matrix and the default rating source is Declarations Only, the Declaration Status legend is displayed.

- When a Proficiency Target Level is not defined for the matrix and the default rating source is not Declarations Only, the Proficiency Level legend is displayed.

**This is my test matrix**

descriptions goes here

Search Employee

Employee

Overall Skill and Training Score: ✔ Target Met - 0 ⚠ Near Target - 0 ❌ Off Target - 3

Employees: (3)		SKILLS	TRAININGS	Rating Source
Employee Name	Overall Skill and Training Score	Leadership	marketing mix	negotiation
Al Morris Sales Director	44% 2/6	5	3	2
Julie Gilbert Corporate Services Manager	50% 3/6	3	4	3
Richard Martin Production Manager	33% 1/6	1	5	2

Back

### Matrix Table Header and Style Updates

The following changes are made to the matrix table header and styles:

- The Employee count is now displayed at the top of the employee list.
- The Rating Source filter is now displayed in the upper-right corner of the matrix.
- A vertical spacer is now displayed between the employee list and the matrix ratings.

### Implementation

This functionality is automatically enabled for all organizations.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Predicted User Proficiency Levels - View	Grants access to view the predicted proficiency level for a user's skill. This permission can be constrained to User, OU, User's OU, User's Self, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine for which user the predicted skill proficiency levels are visible. This is a manager permission.	Core Administration

	As of the April 14, 2023 patch, this permission is automatically available in the default role for all users.	
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available in the People Matrix. This is a manager permission.	Core Administration
User Ratings - View All Shared Ratings	Grants the ability to view all ratings shared with others in addition to the rater. This permission applies anywhere the ratings are displayed, such as the People Matrix and Skills Profile. This permission is intended for indirect managers or non-managers to view rating data for users over whom they have no oversight. This permission grants access to all OU types, both standard and custom. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine whose shared ratings the person can view. This is a manager permission.	Core Administration

## Reporting Fields - Capability Models

With this enhancement, the following new Capability Models fields are added to Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY
Capability Model ID	This field displays the unique ID of the Capability Model. The value for this field is pulled from the ID field on the Capability Models Library page.	Text	Core/General	Capability Model
Capability Model Name	This field displays the name of the Capability Model. The value for this field is pulled from the Name field on the Capability Models Library page.	Text	Core/General	Capability Model
Capability Model Description	This field displays the description of the Capability Model. The value for this field is pulled from the Description field on the Model Details page.	Text	Core/General	Capability Model
Capability Model OUs	This field displays the organizational units associated with the Capability Model. The value for this field is pulled from the Select Your Audience section on the Model Details page.	Text	Core/General	Capability Model
Capability Model OU Include Subordinates	This field displays whether subordinate OUs are included in the OU selection for the Capability Model. The value for this field is pulled from the Select Your Audience section on the Model Details page.	Text	Core/General	Capability Model
Capability Target	This field displays the target capability proficiency level for the skill included in the Capability Model. The value for this field is pulled from the targets on the Capability Targets page.	Integer	Core/General	Capability Model
Capability Target OUs	This field displays the organizational units associated with the Capability Target. The value for this field is pulled from the Capability Targets page.	Text	Core/General	Capability Model

## 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.



**Skills - Top Rated Individuals**

## Skills - Top Rated Individuals

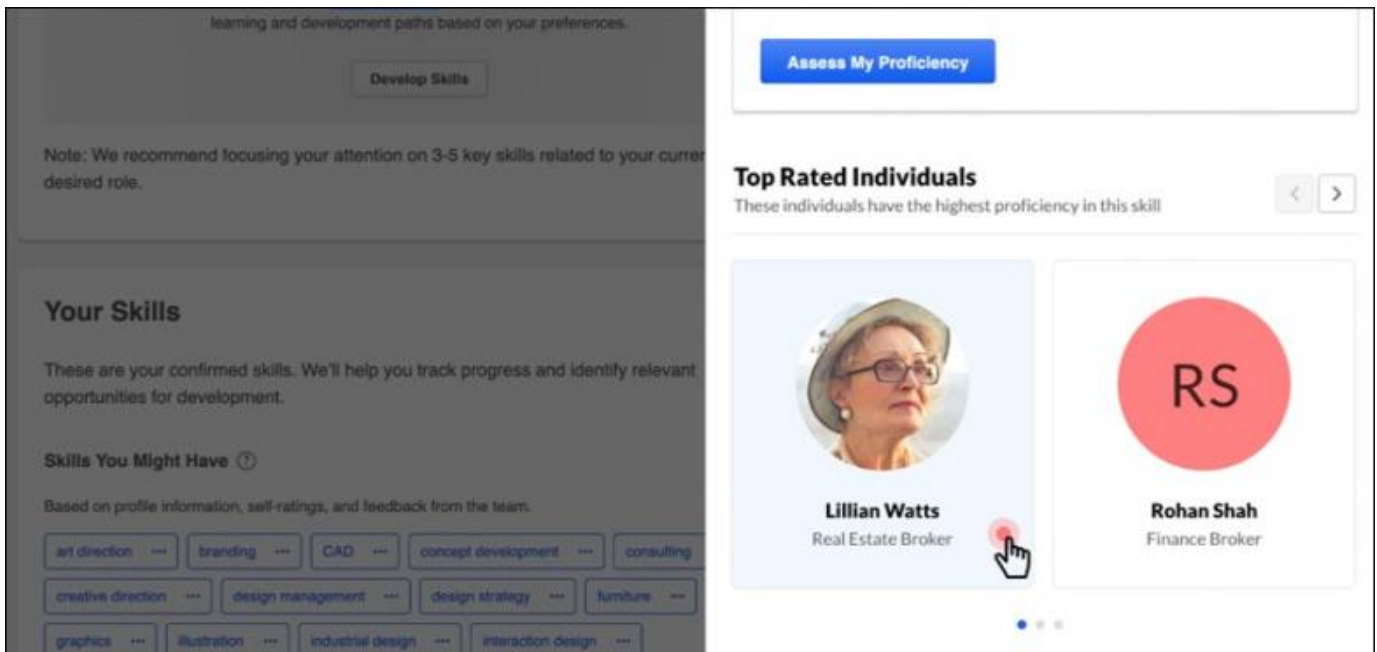
Prior to this release, it was difficult for users to identify experts in their organization for a particular skill for mentoring or collaboration.

With this release, when viewing the Skill Details flyout for a skill, the flyout now displays the top rated individuals within the organization for the skill.

Up to six top-rated individuals are displayed for a skill based on their skill proficiency. A link to the top-rated individual's Skill Profile is included to enable users to easily connect with the top rated individual.

A user will only appear as a top rated individual for a skill if they have a predicted proficiency above 80% for the skill. A user's predicted proficiency rating is an amalgamation of all declared ratings for the user (Self, Manager, and Peers) and the user's skill level that can be inferred from their job history and job title.

If no users meet the 80% skill proficiency, then the Top Rated Individuals section is not displayed.



## How Does this Enhancement Benefit My Organization?

This functionality enables users to identify internal experts within the organization to facilitate knowledge sharing, mentoring, and collaboration within the organization.

## Implementation

This functionality is automatically enabled for all organizations. Administrators can disable this functionality via Skills Profile Preferences.

The *Top Rated Individuals* section is only available to users who have permission to view predicted user proficiency levels.

Administrators can disable this functionality using the **Show Top Rated Individuals in Skill Details Flyout** toggle in the Skills Profile tab of the Capabilities Preferences page.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Predicted User Proficiency Levels - View	<p>Grants access to view the predicted proficiency level for a user's skill. This permission can be constrained to User, OU, User's OU, User's Self, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine for which user the predicted skill proficiency levels are visible. This is a manager permission.</p> <p>As of the April 14, 2023 patch, this permission is automatically available in the default role for all users.</p>	Core Administration

## Skills Profile Preferences - Enable or Disable Top Rated Individuals

The Top Rated Individuals functionality is enabled by default. If necessary, administrators can disable the Top Rated Individuals feature from the Skills Profile Preferences page. The following preference is now available:

- **Show Top Rated Individuals in Skill Details Flyout** - When this toggle is enabled, the *Top Rated Individuals* section is included on the Skills Details Flyout. This section displays the top rated individuals within the organization for the skill. Up to six top-rated individuals are displayed for a skill based on their skill proficiency. A link to the top-rated individual's Skill Profile is included to enable users to easily connect with the top rated individual.

To access Skills Profile Preferences, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PREFERENCES](#). Then, select the Skills Profile tab.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Preferences - Manage	Grants the ability to create and edit expertise levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration

## Core/General Enhancements

## **Accessibility Enhancements**

Accessibility enhancements included with the July '23 Release:

- **Learning Accessibility Enhancements**

## Default Email Address Settings - Deactivation Option

With this release, administrators now have the option to deactivate a default email address. When a default email address is inactive, it cannot be used for newly created emails, but they can remain associated with existing emails and templates. In addition, default email addresses can no longer be deleted unless they are not used in any email template.

Within Corporate Preferences, the *Default Email Address Settings* section now includes an **Active** setting.

- When a default email address is active, the email address can be selected when creating or updating an email in Email Administration and in Marketing Communications. The email addresses can be modified.
- When a default email address is inactive, the email address is not available when creating or updating an email address in Email Administration and in Marketing Communications. The email address cannot be modified or deleted. However, the email address remains associated with any existing emails and templates for which they have been selected. This ensures the email address is not used for new emails and templates but does not impact any existing emails.



Within Corporate Preferences, if a default email address is used in an email template, the email address cannot be deleted from the *Default Email Address Settings* section. Also, only active email addresses can be deleted. This ensures administrators do not delete any default email addresses that are used in existing emails. The Delete icon remains visible but appears deactivated and cannot be selected.

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

When creating or updating an email template in Email Administration or Marketing Communications, administrators can only select default email addresses that are active in Corporate Preferences.

### Default Email Address Settings

Create up to 10 default email address(es) for each email address type which can be used for emails and marketing communication templates:

<b>Create From Address</b>	Active	<b>Create Reply-To Address</b>	Active
default@csod.com	  	ces.mail@csod.com	  
admin@csod.com	  	<input type="text" value="admin@csod.com"/>	 

**Please note :**

- Updating the email address(es) has only an impact on newly created emails and templates. Existing emails and templates remain unaffected.
- Deletion is only possible for default email addresses which are not in use.
- Inactive default email addresses are not available for newly created emails and templates.

### How Does this Enhancement Benefit My Organization?

The Default Email Address functionality provides customers the ability to manage default email addresses efficiently, autonomously, and in a flexible fashion.

### Implementation

This functionality is automatically enabled for all organizations.

## Permissions

The following existing permission applies to this functionality:

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



## **EVO PDF Upgrade**

Cornerstone uses a third-party tool, EVO PDF (HTML to PDF Converter Library) to generate PDFs in Cornerstone CSX.

Prior to this release, CSX was using EVO PDF version 5.x.

With this release, CSX has upgraded to EVO PDF version 9.x.

This upgrade impacts places where PDFs are generated, including the following:

- Bulk Performance Reviews
- Bulk Compensation Statements
- Bulk Succession
- Manage Candidates
- Check-ins

No functional change is expected due to this update.

### **Implementation**

This functionality is automatically enabled for all organizations.

## Group Guardrails

## Group Guardrails - Overview

Groups are used for many business-critical functions, including learning assignments, task assignments, and generating reports. When editing a Group, it is easy to make errors that may result in erroneous training or task assignments.

The Group Guardrails enhancement features are designed to make it easier for administrators to edit Group Criteria and avoid costly errors.

The Group Guardrails enhancement includes the following features:

- Enhanced group details when editing a Group
- An Inactive User Criteria flag for inactive users
- User Criteria search
- A pop-up warning when canceling an edit
- A pop-up notification when saving a Group that is frozen or inactive

## How Does this Enhancement Benefit My Organization?

This enhancement provides tools to make it easier for administrators to edit group criteria and reduce potentially costly errors.

## Frequently Asked Questions (FAQs)

[Will I see the Group Guardrail features when I create a new Group?](#)

No. The Group Guardrail features only apply when editing an existing Group.

[If I am working in a Group and the membership refreshes, will the Last Processed Date and Current Group Membership update?](#)

Yes. The next time you perform any action that causes the page to reload, the Last Processed Date will update, and the Current Group Membership value will reflect the current number of users in the Group.

[I just added users to an existing Group using the CSV file upload. Can I search for these users before I save the Group?](#)

Yes. As soon as a user is added to the Group Criteria, they will appear in the User Criteria Search results, even if you have not yet saved your changes.

[When a user that is included in a Group's criteria is made inactive or re-activated, how long does it take for the 'Inactive' flag to update within the Group Criteria?](#)

The Inactive flag will immediately update. If an administrator is working in a Group at the time the user record is inactivated or activated, the next time the page refreshes, the inactive flag will update accordingly.

[Can I search User Criteria by the filter operator \(e.g., is, is or below, is not, is not or below\)?](#)

Not yet, but we plan to add an operator filter to the User Criteria Search in a future release.

[Are special characters supported in the User Criteria Search?](#)

Yes. All special characters are supported in the User Criteria Search. However, if you only enter a left or right parenthesis into the search box and click Search, all users with a User ID will appear in the results because the parentheses are included in the User ID string. Adding additional characters will improve the results. For example, if your user's first name is "Michael (Mike)", searching for "(M" will return the correct record.

Are there any changes to our daily group refresh schedule or how our groups process?

No. There are no changes to group processing or refresh with the Group Guardrail enhancements.

What time zone is used for the Last Processed date that displays in the Group Details?

This is the same date that displays in the table on the Manage Group page, which is displayed in the Administrator's time zone.

Are these features available in Self Registration Groups (Extended Enterprise) or Social Teams (Connect)?

No. These features are only available in the Groups Organizational Unit.

### Implementation

This functionality is automatically enabled for all organizations.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
OU Group - Manage	Grants the ability to create, copy, and edit custom groups of users without allowing the ability to manage organizational units (OUs). This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
OU Group - Update	Grants access to edit existing custom groups of users. This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration

## Group Guardrails - Editing a Group

Group Guardrails are added when editing a Group.

To edit a Group from the Organizational Unit page, go to [ADMIN > TOOLS > CORE FUNCTIONS > ORGANIZATIONAL UNITS](#). Click the **Manage Organizational Unit Hierarchy** link. From the **Select Organizational Unit** drop-down list, select Group. Then, select the Edit icon in the Options column.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
OU Group - Manage	Grants the ability to create, copy, and edit custom groups of users without allowing the ability to manage organizational units (OUs). This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
OU Group - Update	Grants access to edit existing custom groups of users. This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration

### Enhanced Group Details

When editing a Group, the following information now displays in the *Details* section:

- **Last Processed Date** - This displays the date on which the Group was last processed. Previously, this information was only available on the Manage Group page. This date is displayed in the administrator's time zone.
- **Current Group Membership** - This displays the number of users in the Group as of the Last Processed Date. Previously, this information was only available on the View Active Users.
- **View Current Group Membership** - If there are members in the Group, a **View Users** link is displayed next to the Current Group Membership number. When this link is selected, a pop-up opens, displaying a list of users currently in the Group. This list of users is searchable.

**Note:** The Current Group Membership count and user list is only updated when the Group is processed.

#### Details

**Parent**

**Owner**

**Active**

**Freeze Group Processing**  (By selecting this box, group processing for this group will be turned off)

**Last Processed** 7/10/2023 8:15 PM

**Current Group Membership** 263

## Inactive Flag

Group Criteria can include static User Criteria (e.g., User is John Smith) or dynamic User Criteria (e.g., User is or below Amy Johnson).

Previously, if a user referenced in User Criteria became inactive, it was not possible for administrators to identify that the user is inactive when viewing or editing the Group.

With this release, any inactive User Criteria are enclosed in brackets with the inactive flag, making it easy for administrators to identify inactive users. The user's name and user ID are followed by "(Inactive)" and the entire record is enclosed in brackets. The flag also appears if the criterion is part of a group of criteria.

The Inactive flag only applies to the following Group Criteria:

- User is
- User is not
- User is not or below
- User is or below

The screenshot displays the 'Group Criteria' search interface. At the top, there is a search bar for 'User Criteria Search' with a dropdown for 'User Status' set to 'All' and a green 'Search' button. Below the search bar, there are several criteria listed, each with a trash icon and an edit icon. The criteria are:

- + Add Condition
- All Users Create Date on or after 1/1/2019
- AND Absent equal to No
- AND User is not [ admintester28, hw (hw\_admintester28) (Inactive) ]
- AND Cost Center is not Union Clearinghouse (CH.C. Union)
- + Add Condition
- All Users Location is Belarus (BEL), Pakistan (PAKIS), Philippines (PHIL), India (IND)
- AND User is not Ressa, Maria (m-ressa)
- + Add Condition
- User is [ Santos, Juan Manuel (j-m-santos) (Inactive) ]
- + Add Condition
- User is [ Satyarthi, Kailash (KailashSatyarthi) (Inactive) ]

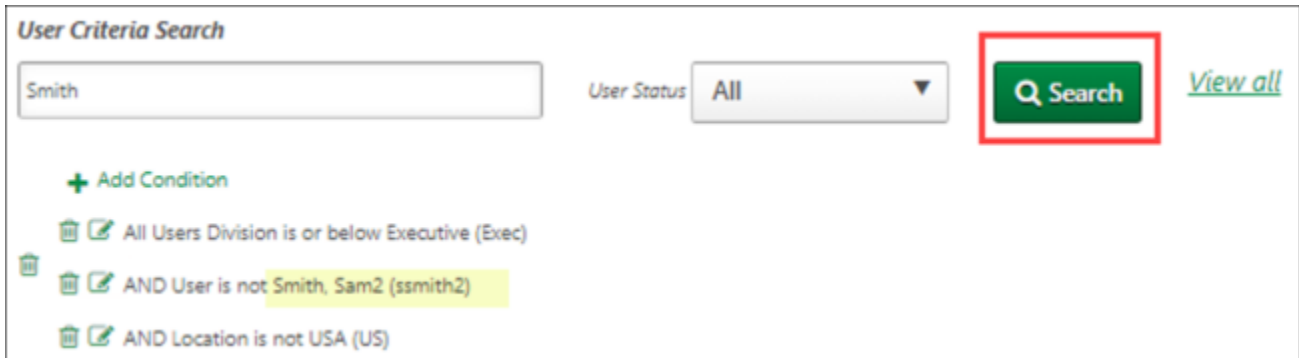
## User Criteria Search

Group Criteria can include hundreds, or even thousands of User Criteria, which results in page after page of criteria.

With this release, administrators can now search for specific User Criteria by first name, last name, user ID, and user status, making it quick and easy to find and edit the necessary criteria.

The following considerations apply to the User Criteria Search:

- The User Criteria Search only returns users who meet the 'User' criteria type. For example, if a Group includes the "Executive" Division, and Anna Smith is included in the Group because she is in the Executive Division, searching for Anna Smith returns zero results because the search is only looking at the "User" criteria type. It does not search for users within dynamic criteria.
- The search criteria are reapplied each time the group criteria are edited. For example, if you search for a user who matches the group criteria, the matching criteria is displayed. If you then edit and save the matching criterion so that the user no longer matches the group criteria, the search results are refreshed, and the criteria is no longer displayed.



**User Criteria Search**

Smith User Status All Q Search [View all](#)

+ Add Condition

- All Users Division is or below Executive (Exec)
- AND User is not Smith, Sam2 (ssmith2)
- AND Location is not USA (US)

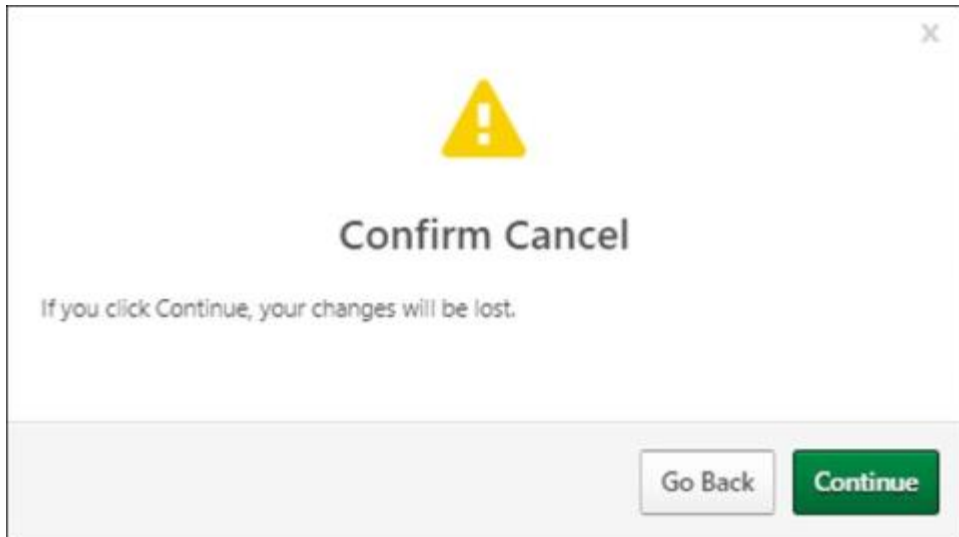
### Pop-up Warning When Canceling Edits

Previously, when an administrator edited a Group and selected Cancel, the administrator was immediately returned to the Manage Group page and all edits were lost.

With this release, when an administrator edits the Group Criteria and selects Cancel, the Confirm Cancel pop-up appears, warning the administrator that all edits will be lost. Within the pop-up, administrators can select **GO BACK** or close the pop-up to return to the Edit Group page. Administrators can select **CONTINUE** to cancel all edits and return to the Manage Group page.

The Confirm Cancel pop-up only appears if the administrator has done one of the following before selecting Cancel.

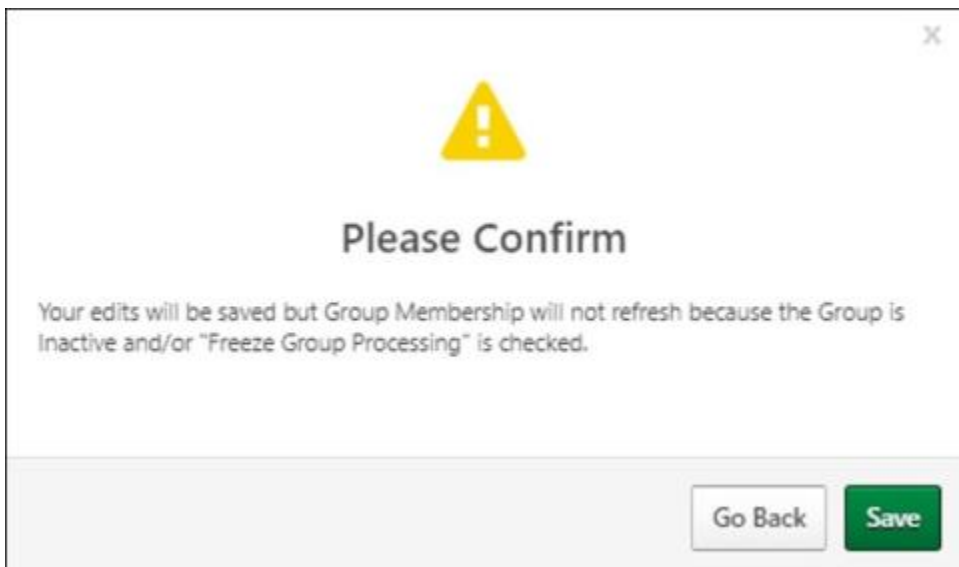
- Edit the Group Criteria
- Select the Active checkbox
- Clear the Freeze Group Processing checkbox



### Pop-up Warning for Freeze Group Processing or Inactive Options

Previously, when an administrator saves a Group that is inactive or has the Freeze Group Processing checkbox selected, there is no warning that the group membership will not process.

With this release, when an administrator saves a Group that is inactive or has the Freeze Group Processing checkbox selected, a pop-up message appears, warning the administrator that saving the Group will not result in the group membership being processed. Within the pop-up, administrators can select **SAVE** to save the Group and return to the Manage Groups page. Administrators can select **GO BACK** or close the pop-up to return to the Edit Group page.





## Language Pack Updates

Cornerstone has increased the cadence of CSX Language Pack updates from each release to monthly. Customers can find a list of Language Pack updates posted each month in the [Language Pack Updates community in the Success Center](#).

## Permissions Constraints Details

## Permissions Constraints Details

With this release, administrators have access to a new Permissions Constraints Details page to review a user's current security profile (roles, permissions, constraints) along with a historical audit of permissions, including when roles, permissions, and constraints were added and removed. These new tools aid administrators in ensuring that a user has appropriate access to the system.

## How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to evaluate a user's current and historical security profile in detail.

## Implementation

This functionality is automatically enabled for all organizations.

Upon release, the new *User Permission and Constraint Details - View* permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

## Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Permission and Constraint Details - View	Grants ability to access the Permissions Constraints Details page for a user. This permission also grants ability to see the Permissions Constraints Details link on the Permissions page. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - View	Grants the ability to search for and view summary information about users in the portal via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. If multiple constraints are added, these constraints are considered OR statements. This is an administrator permission.	Core Administration
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

## User Records Administration - Permissions Constraints Details

With this enhancement, a new **Permissions Constraints Details** option is available for users. This option is only available to administrators with the appropriate permissions, and it is only available for users within the administrator's permission constraints. Selecting this option opens the Permissions Constraints Details page where the administrator can view each of the user's security roles, permissions, constraints, and permission modification history.

To access the User Records Administration page, go to [ADMIN > TOOLS > CORE FUNCTIONS > USERS](#).

To access the Permissions Constraints Details page, select the Options drop-down for a user, and select the **Permissions Constraints Details** option.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - View	Grants the ability to search for and view summary information about users in the portal via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. If multiple constraints are added, these constraints are considered OR statements. This is an administrator permission.	Core Administration
User Permission and Constraint Details - View	Grants ability to access the Permissions Constraints Details page for a user. This permission also grants ability to see the Permissions Constraints Details link on the Permissions page. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration

## User Records Administration - Permissions

With this enhancement, a new **Permissions Constraints Details** link is available on the User Records Administration - Permissions page. This link is only available to administrators with the appropriate permissions, and it is only available for users within the administrator's permission constraints. Selecting this option opens the Permissions Constraints Details page where the administrator can view each of the user's security roles, permissions, constraints, and permission modification history.

To access the User Records Administration page, go to [ADMIN > TOOLS > CORE FUNCTIONS > USERS](#).

To access the Permissions page, select the Options drop-down for a user, and select the **Permissions** option.

### Permissions

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
Users - View	Grants the ability to search for and view summary information about users in the portal via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. If multiple constraints are added, these constraints are considered OR statements. This is an administrator permission.	Core Administration
User Permission and Constraint Details - View	Grants ability to access the Permissions Constraints Details page for a user. This permission also grants ability to see the Permissions Constraints Details link on the Permissions page. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration

## Marissa Andrews - Permissions

### Security Role & Constraints

**Security Roles:** Evaluations Administrator

**System Defined:** Approver

**Security Roles:** Checklist Verifier







Default Role for Every User in the System  
Manager

**General Constraints:**

[Add General Constraint](#)

[Permissions Constraints Details](#)

### Role Permissions

PERMISSION	ADD CONSTRAINT	CONSTRAINTS
<b>Past Training Requests Report</b>		<p>There are no constraints available for this permission.</p> <ul style="list-style-type: none"><li> Restrict to User: Emily Williams</li><li> Restrict to User: Roy Manchester</li><li> Restrict to User: Collin Harris</li></ul>
<b>Approve Training by Manager</b>		<p>There are no constraints available for this permission.</p> <ul style="list-style-type: none"><li> Restrict to User: Emily Williams</li><li> Restrict to User: Roy Manchester</li><li> Restrict to User: Collin Harris</li></ul>

## Permissions Constraints Details Page

The Permissions Constraints Details page displays each of the user's security roles, permissions, constraints, and permission modification history.

To access the Permissions Constraints Details page for a user, go to [ADMIN > TOOLS > CORE FUNCTIONS > USERS](#). Select the Options drop-down for the user and select the **Permissions Constraints Details** option.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - View	Grants the ability to search for and view summary information about users in the portal via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. If multiple constraints are added, these constraints are considered OR statements. This is an administrator permission.	Core Administration
User Permission and Constraint Details - View	Grants ability to access the Permissions Constraints Details page for a user. This permission also grants ability to see the Permissions Constraints Details link on the Permissions page. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration

### Wyatt Brooks - Permission Constraint Details

#### Security Roles

(10063)

(10064)


(10065)

Default Role for Every User in the System (10036)

Delegated Role for Performance Review (10009)

Training Unit Distributor (10039)

#### Permissions & Constraints

Action Items - EPM	<b>Roles</b> Default Role for Every User in the System (10036)	Constraints  No Constraints Found	History
Action Items - LMS	Details		History
Action Items - View	Details		History
Announcements - View	Details		History
Applicants: Manage Onboarding	Details		History

## Security Roles

The *Security Roles* section displays each of the security roles to which the user is assigned. This includes custom security roles assigned to the user and system-defined security roles that are dynamically assigned to the user, such as Manager and Default Role for Every User in the System.

This section displays the security role title and its corresponding role ID.

## Permissions & Constraints

The *Permissions & Constraints* section displays each of the user's permissions and their corresponding roles, constraints, and audit history.

### View Permission Details

Select the **Details** link next to a permission to view each of the user's security roles that contain the permission and any constraints applied to the permission.

### View Permission History

Select the **History** link next to a permission to view history information for the permission.

Note the following:

- All dates and times are displayed in AM/PM format and are localized to the logged in user's time zone.
- No historical data is available to system defined roles, such as Manager, Approver, and Default Role for Every User in the System, unless permissions were manually added to these roles.

The following information is displayed:

- **Security Role Details** - This section displays details about the user's current and historical security roles that contain the permission. The security roles displayed are based on the user's history with the permission. For example, if the permission is associated with ten security roles in the system but the user is only associated with two of these security roles, then only the two security roles associated with the user are displayed in this section.
- **Permissions Constraints Details** - This section displays historical details of the constraints that have been defined for the permission at the role level. This section displays the type, value, and dates when the constraint was added or removed.
- **User Role Details** - This section displays when the user has been added or removed from the security role that contains the permission.
- **User Constraint Current Details** - This section displays the user's current constraints applied to the permission. The constraints reflect only what the user currently has from roles already assigned as well as system roles, such as Manager, Approver, and Default Role for Every User in the System. Constraints from dynamic roles not yet assigned to the user are not reflected in the list.
- **User Constraint History Details** - When available, this section displays the user's current and previous constraints applied to the permission.
  - User constraints auditing data are currently not captured in Production and Pilot environments. This will be enabled in Q3. User constraint historical data will only be available from the point auditing is enabled. That is, no user constraint actions (add or remove) that occurred prior to auditing being enabled will be captured in this table.
- **Security Role Assignment Details** - This section displays details of the historical assignment of the security roles that contain the permission. The details include the following information:
  - Users or OUs to whom the role was assigned or removed, including subordinates



- Whether the action was immediate or dynamic
- The merge type for the constraints
- The administrator who performed the action
- The date and time of the action

**Note:** Although administrators cannot perform assignment actions on system-defined roles, these records are still included in the table for visibility purposes.

Security Permission Details for Assign Training								
Security Role Details								
Role Title	Role ID	Inherited	Date Permission Added to Role			Date Permission Removed from Role		
Delegated Role for Assign Training	10020	No	10/31/2015 03:10:51 AM					
Approver	10050	No	10/31/2015 03:10:51 AM					
Manager	10051	No	10/31/2015 03:10:51 AM					
Learning Administrator	10062	No	10/31/2015 03:10:51 AM					
Permissions Constraints Details								
Role Title	Role ID	Constraint Type	Constraint Value	Include Subordinates	Date Constraint Added	Date Constraint Removed		
User Role Details								
Role Title	Role ID	Date User Added to Role			Date User Removed from Role			
Approver	10050	3/23/2018 05:56:06 AM [Dynamic]						
Manager	10051	3/23/2018 05:56:06 AM [Dynamic]						
Learning Administrator	10062	4/19/2012 12:50:33 PM			4/30/2012 01:30:34 PM [Dynamic]			
User Constraint Current Details								
Constraint Type	Constraint Value			Date Constraint Added to User				
Restrict to User	Collin Harris (charris)			7/21/2016 11:29:08 AM				
Restrict to User	Emily Williams (ewilliams)			7/21/2016 11:29:08 AM				
Restrict to User	Roy Manchester (rmanchester)			7/21/2016 11:29:08 AM				
User Constraint History Details								
Constraint Type	Constraint Value	OU Type	Include Subordinates	Date Constraint Added to User	Date Constraint Removed from User			
Security Role Assignment Details								
Role Title	Role ID	Applied To	Include Subordinates	Dynamic	Merge Type	Performed By	Action Date	Action Type
Learning Administrator	10062	User	No	No	Append Constraints	Tasha Shore (tmoore)	4/30/2012 01:30:34 PM	Removed
Learning Administrator	10062	User	No	No	Append Constraints	Cornerstone Admin (cesadmin)	4/19/2012 12:50:33 PM	Added
Approver	10050		Yes	Yes	Append Constraints			
Manager	10051		Yes	Yes	Append Constraints			

## Edge Import Enhancements

# Edge Import Framework - Cancel Loads

Prior to this release, organizations had to contact Cornerstone Global Customer Support to cancel a data load.

With this release, administrators now have the ability to cancel a load from the Load Details page.

The **Cancel** link appears in the *Information* section of the Load Details page for the specific load. The Cancel option is only available to the person who initiated the load, and it is only available if the import processing has not completed.

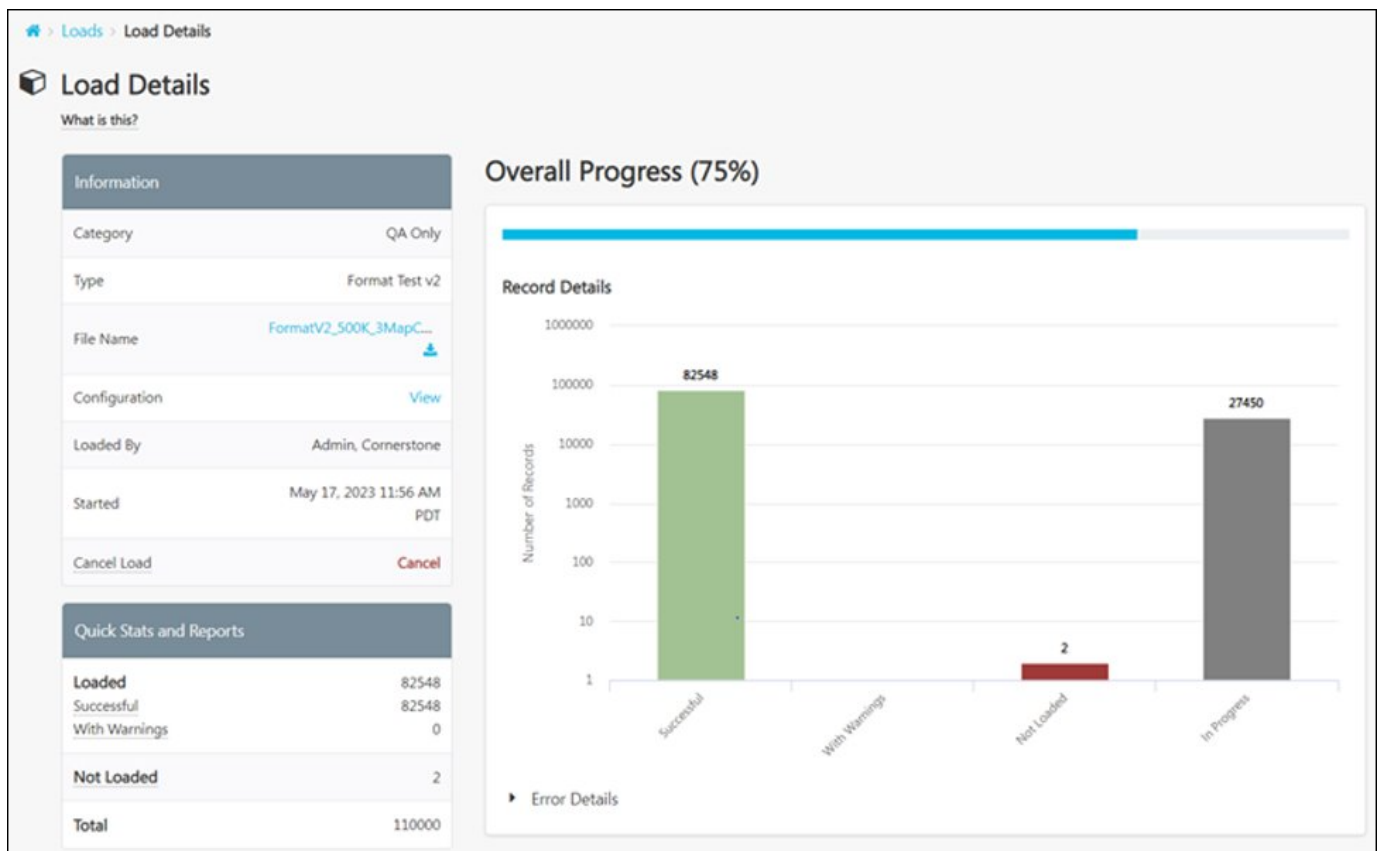
When a load is cancelled, any records that started processing will complete processing and be loaded. These records can be viewed in the report details. Any records that did not start processing will be cancelled.

If the load is cancelled, then the following information is displayed in the *Information* section:

- Cancelled - This displays the date and time at which the load was cancelled.
- Cancelled By - This displays the name of the user who cancelled the load.

If the load is cancelled, then the following information is displayed in the *Error Details* section:

- Error: Load has been cancelled.
- Count: The number of records that were cancelled.



## How Does this Enhancement Benefit My Organization?

Administrators can now cancel a load for a file they no longer want to import.

### Considerations

- Only the person who uploaded the file can cancel the load.
- The load can only be cancelled if the import processing has not completed.
- Once the load is cancelled, remaining records are not imported. However, backend processes will continue to run and complete.
- After the import processing has completed, administrators can view how many records were cancelled in the Error Details section.

### Implementation

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

### Permissions

The following existing permission applies 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 Learning Load Enhancements

Edge Import was originally designed to support historical data load use cases. This enhancement provides support for day-to-day bulk data management use cases.

These enhancements impact manual loads, feeds, and Bulk API.

### Video Load - Provider Type

The Video load now accepts "Video" in the Provider Type field. Previously, only Online and ILT were supported. This enhancement aligns with the system interface, as Video Provider is a provider type that is available when creating video training items.

### LO Availability Load - Additional LO Types

The LO Availability load can now be used to update availability for the following LO types:

- Cohort
- External Content
- Playlist
- Program
- Quick Course

### Implementation

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

The template guides in Edge Import will be updated upon release.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Bulk API - LMS - LO Availability	Grants access to the LO Availability load in the Bulk API. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Bulk API - LMS - Video	Grants ability to use the Bulk API to load video learning object data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access LMS - LO Availability Feed	Grants access to the LO (Learning Object) Availability data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Access LMS - LO Availability Load	Grants access to the LO (Learning Object) Availability 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

## Edge Import Requisition Template Load - Feeds

With this release, data feeds are now available for the Edge Import Requisition Template load. Data feeds allow recruiters to make changes to requisition templates in bulk automatically on an ongoing basis. Recruiters can simply update the templates in a shared location, and the data feed can update the templates in the system, and recruiters do not have to run the data load each time for any changes.

When configuring the data feed, administrators can specify the FTP location for the data file to be read, the schedule on which the feed will run, and any notification details. Administrators can also configure an encryption key, if necessary.

### Implementation

A case to customer support can be raised to enable access to this feed. Administrators can set up the feed on the Edge Import Feed Settings page. Access to the Feed Settings page is controlled by the existing "Access REC - Requisition Template Load" permission. Once the feed is set up it will automatically run the load as scheduled.

### 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 REC - Requisition Template Load	Grants access to the Requisition Template load for Recruiting via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

# Support “Currency” in Individual Target Compensation Edge Import Template

Prior to this release, customers could not use Edge Import to set the currency applicable to employees when importing individual targets. Administrators first had to convert the individual targets into the employee's local currency and then load the file with the appropriate amounts.

With this release, the Individual Target Edge Import now includes a Currency field. With this field, customers can associate each individual employee with their geographical currency to receive Individual target types like bonus or equity. Multiple employees with different currencies can be added in a single template to load Individual target types.

## How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to load, map, and convert the currency of employees using Individual Targets.

## Considerations

The Currency field is optional. If no currency is provided and a currency is mapped to the employee at the user record level, then the individual target is imported using the user's currency. If no currency is provided and no currency is mapped to the employee at the user record level, then the portal's default currency is used.

## Implementation

This functionality is automatically enabled for all organizations using Compensation data loads in Edge Import.

The template guide in Edge Import will be updated upon release. This includes a list of active currencies available in the portal.

## 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 - Load Individual Target	Grants access to the individual target load for Compensation via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import



# Integrations & APIs - Core/General

## **ADP Workforce Now Integration Enhancements**

ADP Single Sign-on and Workforce Now Core Data Inbound Integrations are being renamed:

- ADP Single Sign-on (ADP Canada Marketplace) is renamed to Cornerstone Learning Single Sign-on for ADP Workforce Now® (ADP Marketplace Canada)
- ADP Single Sign-on (ADP US Marketplace) is renamed to Cornerstone Learning Single Sign-on for ADP Workforce Now® (ADP Marketplace U.S.)
- ADP Workforce Now Core Data Inbound Integration (ADP Canada Marketplace) is renamed to Cornerstone Learning Connector for ADP Workforce Now® (ADP Marketplace Canada)
  - In the ADP Marketplace (US storefront), the corresponding integration is renamed to Cornerstone Learning Connector for ADP Workforce Now®.
- ADP Workforce Now Core Data Inbound Integration (ADP US Marketplace) is renamed to Cornerstone Learning Connector for ADP Workforce Now® (ADP Marketplace U.S.)
  - In the ADP Marketplace (Canada storefront), the corresponding integration is renamed to Cornerstone Learning Connector for ADP Workforce Now®.

As a result of this change, the corresponding email notifications, validation messages, and starter guides are updated to reflect the changes.

## BambooHR User & OU Inbound Integration

The integration between Cornerstone CSX and BambooHR provides a seamless process of creating and updating users and organizational units in CSX. This is achieved through an automated data sync which simplifies data management and eliminates redundant work. BambooHR will remain the system of record for user and OU data.

This is a one-way integration from BambooHR to CSX. The integration runs nightly at a pre-defined schedule for both OU and user syncs and can also be triggered ad hoc.

### Implementation

Upon release, a new tile will be available in Edge Marketplace that allows customers to install, configure, and enable the integration.

Configuration details will be provided in the starter guide.

### 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 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

# Webhooks

## Webhooks (Early Adopter)

Webhooks is an HTTP-enabled feature that enables customers to create a deeper integration into the Cornerstone ecosystem by enabling near real-time access to critical business event data.

### Why use Webhooks?

Webhooks provides the following:

- Event-driven notifications to drive more timely business process execution
- Full event data payloads that do not require multiple API calls
- Asynchronous processing of data
- Decreased implementation complexity

Customers implementing Webhooks will see the following:

- Easier integrations that yield lower TTFHW (Time to First Hello World), which is an important metric for data integrations
- Fewer polling API calls to receive critical data faster
- Improved data quality yielding fewer data-fix and no-fix defects

Compared to current API functionality, customers should see a reduced need to call throttled APIs such as the Reporting API, Employee API, and Training API as they adopt the corresponding Webhooks. Webhooks can be used to supplement existing API calls for Employee, Transcript, and Training information to shorten the time to receive notifications on changes to any of this information. **Note:** Employee and Transcript event Webhooks will be available in a later release. Only Training Assignment/Completion and Status monitoring events are available in the Early Adopter release.

### Data Throughput of Webhooks

Data throughput of webhooks is dependent upon endpoint call response time and the infrastructure tiering of the webhook:

- Tier 1: 300 records per minute

**Note:** In the Early Adopter release, all webhooks are built with Tier 1 infrastructure. Further information will be provided about infrastructure tiering prior to the GA (General Availability) release.

### Early Adopter Webhooks Key Features

Customers can create, stop, and start webhooks for easy consumption of Cornerstone business event data. Customers can subscribe to Status webhooks to automate organizational alerts. An action audit log is being captured for Cornerstone's support team to ensure compliance and change tracking. However, the audit log will not be exposed via the user interface until a future release.

### Future Enhancements

Future enhancements may include the following:

- Ability to establish notifications based on a Status webhook
- Support of infrastructure tiering to support business process requirements
- Addition of filtering to control the output of webhooks payloads
- Projection of webhook payloads to reduce amount of data in a payload

## Implementation

Webhooks can be enabled for all customers except for customers on swimlanes SL4 and SL5.

To enable Webhooks in Stage environments, contact Global Customer Support.

To enable Webhooks in Production environments, contact your account executive to purchase Webhooks. Once purchased, contact Global Customer Support to enable Webhooks.

When Webhooks are enabled, the new *Edge Endpoints - Create Secret*, *Edge Endpoints - Manage*, *Edge Endpoints - View Secret*, *Edge Endpoints - View*, *Edge Webhooks - Manage*, *Edge Webhooks - Start/Stop*, and *Edge Webhooks - View* permissions are automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

## Set up a Webhook

To set up a webhook, you must first create an endpoint to link your hosted URL and the webhook. [See \*\*Create a Webhook Endpoint\*\*](#) on page 101 *for additional information*.

Then, create a webhook to begin publishing events to your endpoint. [See \*\*Create a Webhook\*\*](#) on page 103 *for additional information*.

## Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Endpoints - Create Secret	Grants access to create the secret key for Edge Endpoints used with Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Endpoints - Manage	Grants access to view, create, edit, and verify Edge Endpoints used with Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Endpoints - View Secret	Grants access to view the secret key for Edge Endpoints used with Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Endpoints - View	Grants access to view Edge Endpoints used with Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Webhooks - Manage	Grants access to view, create, and edit Edge Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge

Edge Webhooks - Start/Stop	Grants access to start and stop Edge Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge
Edge Webhooks - View	Grants access to view Edge Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge

## Create a Webhook Endpoint

The first step in creating a webhook is to create a webhook endpoint to link your hosted URL and the webhook.

To create a webhook endpoint, go to [ADMIN > TOOLS > EDGE > ENDPOINTS](#) and select **Create Endpoint**.

### Permissions


PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Endpoints - Manage	Grants access to view, create, edit, and verify Edge Endpoints used with Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge

### Create New Endpoint ✕

**\* Endpoint Name**

**\* Endpoint URL**

**\* x-api-key**

**Security Token**  
681a22b234  Copy

Enter the following information for the webhook endpoint:

1. **Endpoint Name**
2. **Endpoint URL**



### 3. x-api-key

Select the **CREATE AND VERIFY** button to run the verification process and ensure the endpoint is available for a webhook.

## Create a Webhook

After creating a webhook endpoint, you can create a webhook that is connected to the existing endpoint.

To create a webhook, go to [ADMIN > TOOLS > EDGE > WEBHOOKS](#) and select **Create Webhook**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Webhooks - Manage	Grants access to view, create, and edit Edge Webhooks. This permission can be constrained by OU and User. This is an administrator permission.	Edge

### Create New Webhook ✕

**\* Webhook Name**

  
**\* Event Category**

Select an Option ▼

**\* Endpoint**

Select an Option ▼

#### Custom Headers

You can add up to three custom headers to help authenticate this webhook. Do not use login credentials.

[+ Add Custom Header](#)

[Cancel](#) [Create Only](#) [Create and Start](#)

Enter the following information for the webhook endpoint:

1. **Webhook Name**
2. **Event Category**

3. **Endpoint** - Select the endpoint to which you will publish events.

**Note:** If the desired endpoint is not appearing, return to the endpoint and select the **VERIFY NOW** button and ensure there are no errors.

4. Select a Custom Header, if applicable.

Select **CREATE AND START** to immediately create and start the webhook and begin the flow of event data. Otherwise, select **CREATE ONLY** to create the webhook with the flow of event data stopped.

# Mobile Enhancements

## Create & Edit Goals from Cornerstone CSX App

With this enhancement, users can now use the Cornerstone CSX app on their mobile devices to perform the following Goal tasks:

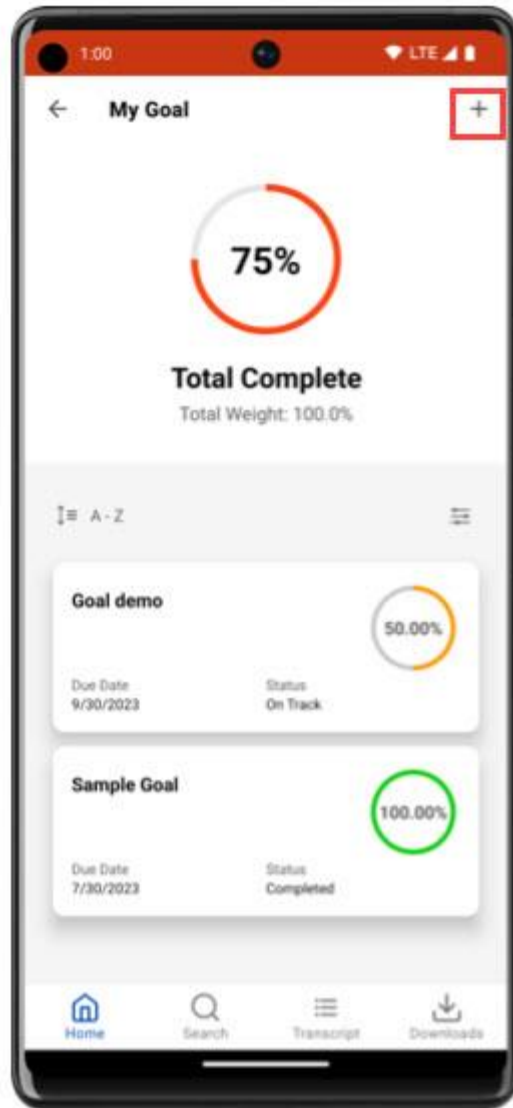
- Create and edit goals
- Update goal progress
- Add and edit tasks and targets to goals
- Update success descriptors
- Add and edit goal comments

**Note:** *With this release, the Cornerstone Learn app name is changed to Cornerstone CSX. See [Re-naming Cornerstone Learn App in July 2023](#) on page 111 for additional information.*

### My Goal screen

Use the My Goal screen to view current goals and access the Create Goal screen.

- To create a goal, tap the plus sign (+).
- To edit a goal, tap the goal to open the goal details.

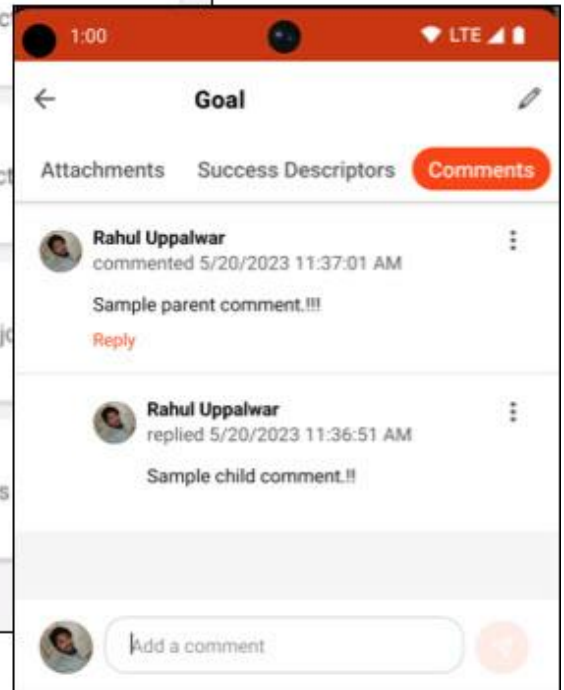
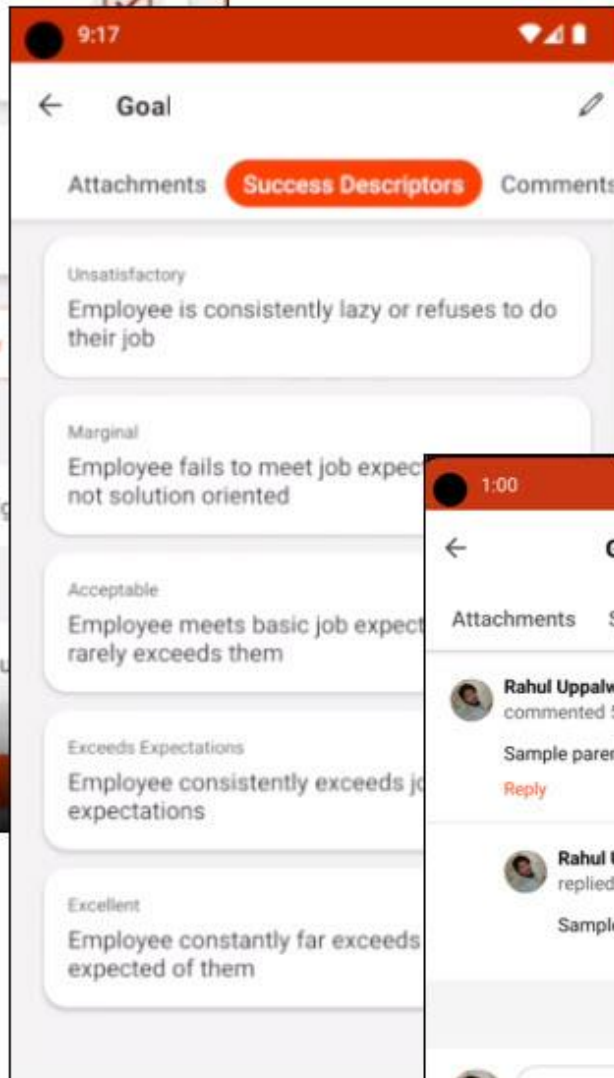
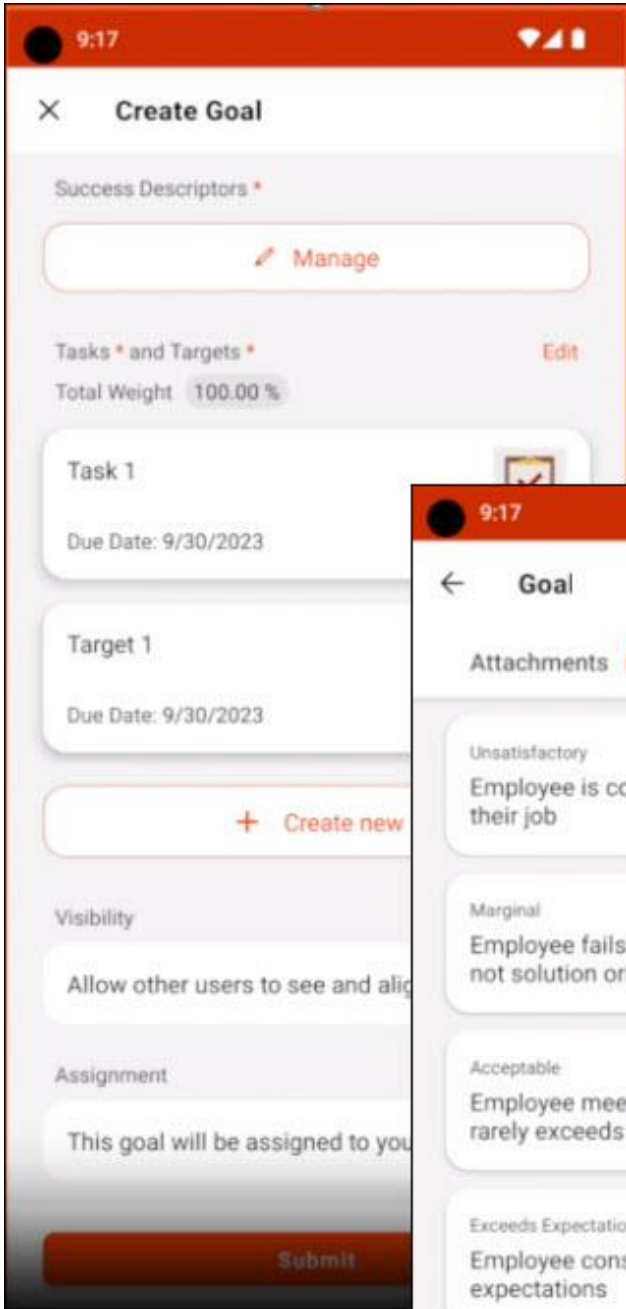


## Create Goal Screen

Use the Create Goal screen to complete all of the appropriate goal fields.

The image shows a mobile application interface for creating a goal. At the top, the status bar displays the time 1:00, LTE signal, and battery level. The app header is red with a white 'X' icon and the text 'Create Goal'. The form consists of several fields: 'Title \*' (empty), 'Description \*' (empty), 'Start Date \*' (7/1/2023) and 'Due Date \*' (9/30/2023) with a minus sign between them, 'Weight \*' (0.00), 'Perspective \*' (Select a Perspective >), and 'Categories \*' (Select Categories >). Below these is a 'Success Descriptors' section with a red-bordered box containing a red icon and the word 'Measure'. At the bottom is a grey 'Submit' button.

Users can also create and edit Tasks & Targets, Success Descriptors, and Comments.





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

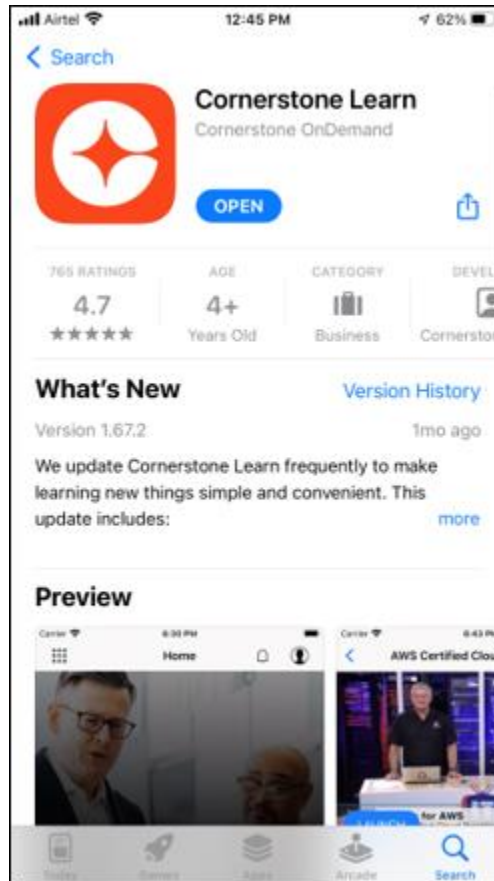
Learners can set and achieve their goals by providing a mobile tool to create and edit goals, track their progress, and see their progress in a visual format.

## Re-naming Cornerstone Learn App in July 2023

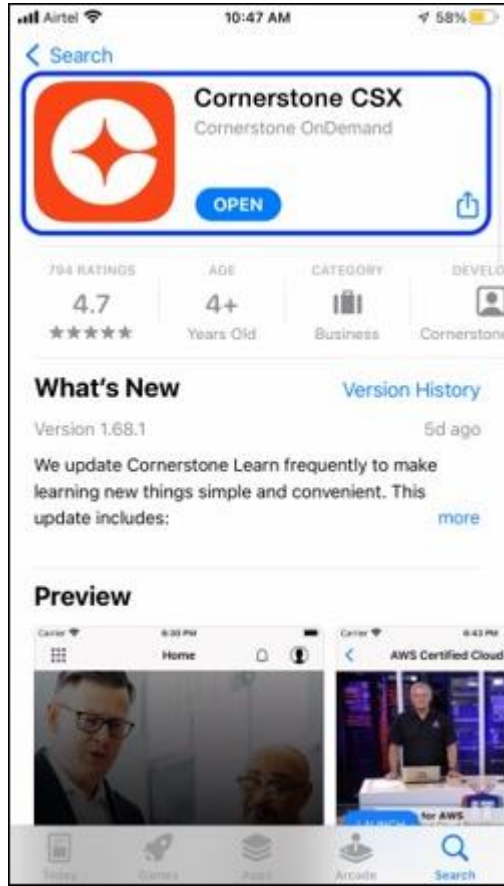
A unified talent experience for desk and deskless workers is a requirement for many customers looking to manage continuous learning and performance, in the moment. Nearly half of Cornerstone Learning users are also using Cornerstone Performance and would benefit from being able to access goals and other Performance capabilities while in the mobile app. Cornerstone will rename the existing “Learn” App to simply “Cornerstone CSX” App in July 2023. Users of the app will be able to access select Cornerstone Performance features beginning with Goals in the March 2023 release. Additional features will be introduced in 2023 and beyond.

The new app name “Cornerstone CSX” will be searchable in app stores for iOS and Android devices on July 21, 2023 (Cornerstone CSX Q3 Release).

### Before: Existing App Name is “Cornerstone Learn”



After: New App Name will be "Cornerstone CSX"



# Reporting Enhancements

## **New Standard Report - Dashboards Details Report**

Prior to this release, organizations would rely on custom work orders to identify dashboard details such as the dashboard creator and with whom the dashboard is shared.

With this release, a new Dashboards Details standard report is available for administrators to report on metadata related to the dashboards in the portal.

To access the Dashboards Details Report, go to [REPORTS > STANDARD REPORTS](#). From the System tab, select the **Dashboards Details Report** link.

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

This feature enables administrators to generate a report with details about dashboards created in the organization.

### **Report Criteria**

The following criteria options are available:

- **User Criteria** - Select which users are included in the report. The report will only include dashboards created by the selected users.
- **Creation Date** - Select which dates are included in the report. The report will only include dashboards created within the selected date range.
- **Dashboard Title** - Specify the dashboard title. The report will only include dashboards with a title that contains the text in this field.
- **Sharing Details: Include Dashboard Sharing Details** - Select this option to include dashboard sharing details in the report.

## Dashboards Details Report

Report Criteria

View details about Dashboards in your portal. The maximum number of rows is 100,000.

USER CRITERIA

User Criteria:

DATE FILTERS

Creation Date:  From:  To:

ADVANCED CRITERIA


Dashboard Title:

ADDITIONAL REPORT COLUMNS

Sharing Details:  Include Dashboard Sharing Details

PROCESS REPORT

Report Title:   
(If no report title is entered, the title of the report will default to Dashboards Details Report)

 [Process Report](#)

### Report Output

The following dashboard details are included in this report when the **Sharing Details** option is unchecked:

- Dashboard Title
- Dashboard ID
- Dashboard Creator User ID
- Dashboard Creator Full Name
- Dashboard Creator User Status
- Create Date
- Modified Date
- Creator Division ID
- Creator Division

In addition to the above details, the following sharing details are included in the report when the **Sharing Details** option is checked:

- Shared OU ID
- Shared With OU Title
- Shared With OU - Include Subordinates
- Shared with User ID
- Shared With User Full Name

- Shared with User Status
- Shared With User - Include Subordinates

### Considerations

- The report output is .xlsx format.
- The report output includes a maximum of 100,000 rows.
- All report criteria options are optional. If no criteria options are selected, the report output includes all dashboards created by any user at any time.
- Date and time fields are displayed in the time zone of the user running the report.

### Implementation

This functionality is automatically enabled for all organizations using Dashboards.

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

### Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Dashboards Details Report	Grants access to view the Dashboards Details Report, which displays details related to the dashboards in their portal, such as the dashboard creator and with whom the dashboard is shared. This permission cannot be constrained. This is an administrator permission.	Reports - System

## Reporting 2.0 - Calculated Field Enhancement

Global calculated fields can contain unpublished (non-global) calculated fields within the formula.

Previously, if a shared users had manage permissions for Reporting 2.0 could copy the report and access the underlying private calculated fields in the original report creator's list of available fields.

With this release, global calculated fields now have visibility restrictions for when the formula references an unpublished (non-global) calculated field. This restriction ensures that when a report is copied by a shared user, the global calculated field remains as a private calculated field when non-global calculated fields are referenced in the formula.

When a global calculated field references a non-global calculated field in its formula, it now behaves as if a shared user is missing permissions or availability to that global calculated field. Shared users can continue to view the intended calculated field output in the report output only. The global calculated field is not visible to shared users in the report designer data folders until all underlying non-global calculated fields are published globally.

When a user tries to publish a calculated field globally which references a non-global calculated field by enabling the Publish Field Globally toggle and saving the field, a warning message is displayed.

- If the user selects Yes, the field is published globally.
- If the user selects No, the Publish Field Globally toggle for the calculated field that references the non-global calculated field is disabled, and the field is not published globally.



### Impact on Existing Reports

Shared reports and charts are not impacted by this enhancement.

Existing reports that were created by copying a shared report which included a calculated field that references a non-global calculated field are impacted by this enhancement.

- A global calculated field referencing a non-global calculated field is no longer visible to the shared users in the report designer.
- When an existing report is shared with a global calculated field that references a non-global calculated field, the shared user continues to see the global calculated field in the shared report output. However, when the shared report is copied, the global calculated field is not included in the copied report as it references a non-global calculated field.
- For an existing dashboard using a widget of a copied report that has a global calculated field referencing a non-global calculated field, the widget is not available because the underlying report no longer includes the global calculated field.



- When a chart is copied, if it contains a global calculated field that references a non-global calculated field, then the system displays a message that the chart will be removed from the copied report. If the user continues, then the chart is removed from the copied report.

## **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.

## Reporting 2.0 - Display Total Number of "Selected" Units in Shared Flyout

Previously, when a report owner shared a report by sharing the folder containing a report and not sharing the report directly with any users, the Shared flyout displayed "Selected (0)."

With this release, when a report owner shares a report by sharing the folder containing a report, the Shared flyout now accurately reflects the number of selected organizational units and users with whom the report is shared, including direct report sharing and folder sharing.

### How Does this Enhancement Benefit My Organization?

Report owners are now able to see a count of all the selected users and organizational units with whom the report is being shared, from both direct sharing and folder sharing.

### 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.

## Reporting 2.0 - Report Output Header Update

With this release, in the header section of the report output, "Generated By" is renamed to "Report Created By." This field populates the report owner's name. This update also includes report headers for reports delivered via email.

### How Does this Enhancement Benefit My Organization?

This enhancement helps report recipients by clearly identifying who created the report.

### 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.

## Reporting 2.0 - Reporting Fields List UI Improvement

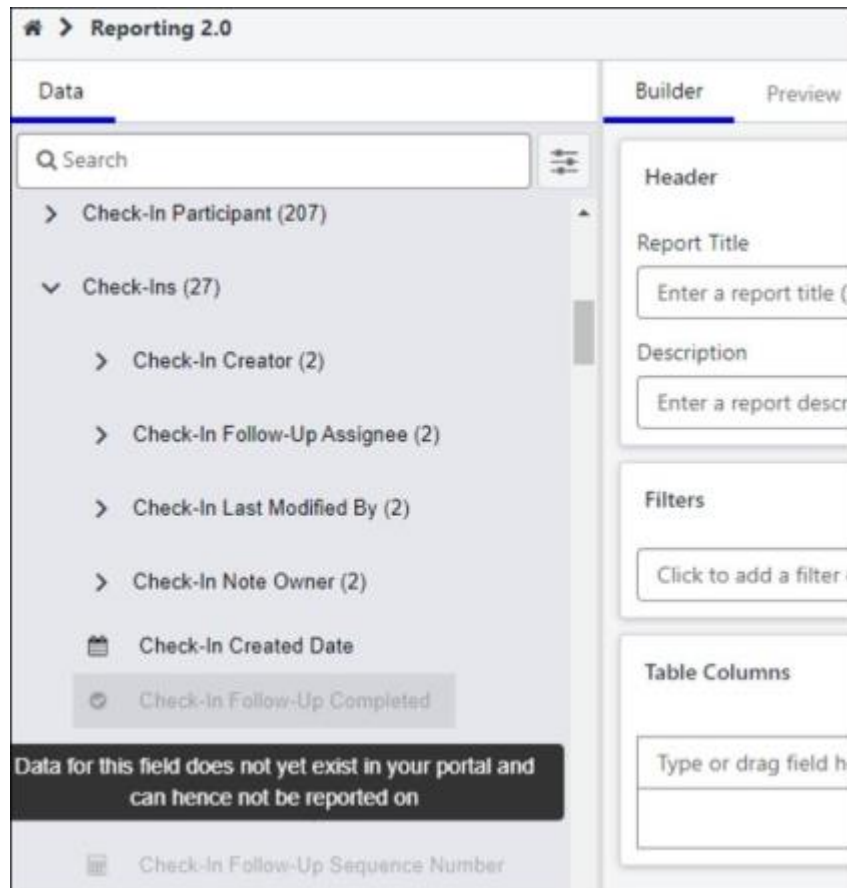
Previously, it was possible to include fields in Reporting 2.0 for which the underlying data tables had not yet been created. This occurred when a new functionality was enabled, but no data was created in the portal for this new functionality. When these fields were included in a report, the report would yield an error message.

With this release, if a field is available in Reporting 2.0 but no underlying data tables have been created for the data, the fields appear gray and disabled, identifying that the functionality that corresponds with the field is available in the portal, but no underlying data table has been created. Once the newly enabled functionality is used and underlying data tables are created, the fields automatically become selectable in Reporting 2.0.

**Note:** Examples of sections this feature applies to are Check-Ins, Capabilities, and Capability Models. The fields are only greyed out in Reporting 2.0 if these functionalities were never used or tested in your portal. Even if the functionality is not currently in use, but has been activated in the past, the fields will not be greyed out.

Be aware that this does not apply to Custom Fields, because underlying tables are created although data may not be populated in the portal (e.g., Transcript custom fields).

When a field is disabled, administrators can hover over the field to view an explanation of why the field is disabled.



## How Does this Enhancement Benefit My Organization?

This feature provides interface improvements in the Reporting 2.0 fields list to denote field data unavailability in the portal.

## 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.

## Reporting 2.0 Delivery Log Standard Report - New Status Values

Prior to this release, new delivery statuses were introduced in Reporting 2.0, but were not yet displayed in the Reporting 2.0 Delivery Log standard report.

With this release, the Reporting 2.0 Delivery Log standard report now includes all Reporting 2.0 delivery statuses.

The following delivery statuses are now available in the Reporting 2.0 Delivery Log standard report:

- Email delivery is partially successful (fails for few users) and FTP delivery is successful
- FTP delivery failed and Email delivery is partially successful (fails for few users)
- Email delivery is partially successful (fails for few users)

The following statuses remain unchanged:

- FTP delivery failed, Email delivery succeeded
- Email delivery failed, FTP delivery succeeded

### Implementation

This functionality is automatically enabled for all organizations.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting 2.0 Delivery Log	Grants access to view the Reporting 2.0 Delivery Log, which displays user-level information about deliveries for your Reporting 2.0 Reports.	Reports - System

## **Reporting 2.0 New Fields - July 2023**

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

- **Reporting Fields - Capabilities**
- **Reporting Fields - Learning**

## 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 for Reporting API, RDW, and Data Exporter Community](#). Join and follow the community to be notified of new objects with Delta support.



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

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 July '23 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 June 21 and in production with the release on July 21.

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 - Changes Scheduled for July '23 Release

There are no deprecated objects for the July '23 Release.

This table describes changes in objects scheduled for a future release.

OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
application_cf_enum_local_core devplan_cf_enum_local_core offer_letter_cf_enum_local_core ou_cf_enum_local_core performance_review_cf_enum_local_core succession_cf_enum_local_core training_cf_enum_local_core training_forecast_cf_enum_local_core user_cf_enum_local_core	Object Key will be changed from Key: option_id, culture_id to Key: field_id, option_id, culture_id	Release 24.01.00 (March 2024)	Scheduled
Object: training_local_core Field: descr	Data type will be changed from nvarchar(4000) to nvarchar(10000)	Release 24.01.00 (March 2024)	Scheduled

### RTDW - Changes Scheduled for July '23 Release

There are no deprecated objects for the July '23 Release.

This table describes changes in objects scheduled for a future release.

OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
Object: report.vw_rpt_ training_local Field: [descr]	Data type of [descr] field will be changed from nvarchar(4000) to nvarchar(max), data in [descr] field will be capped at 10000 characters	Release 24.01.00 (March 2024)	Scheduled

## Standard Report - View All Security Roles Enhancement

Prior to this release, administrators could only see security roles that are assigned to them and their child security roles in the Security Role - User Permissions Report and Security Role - Audit Report output. This restriction also applied to the Security Role search feature within these two reports and the permission search feature in the "Security Role - User Permissions Report.

With this release, administrators can see all the security roles in the system in the Security Role - User Permissions Report and Security Role - Audit Report output regardless of their assigned roles. This also applies to the Security Role search feature within these two reports and the permission search feature in the "Security Role - User Permissions Report.

**Note:** This change only applies to Security Role - User Permissions Report and Security Role - Audit Report. This change does not apply to the Security Administration page.

### Implementation

This functionality is automatically enabled for all organizations.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Role - Audit Report	Grants access to the Security Role - Audit Report, which enables organizations to report on which users have been assigned to which security roles and the security role modification history. This permission cannot be constrained.	Reports - System
Security Role - User Permission Report	Grants access to the Security Role - User Permission Report, which enables organizations to report on the roles assigned to a user and the permissions and constraints associated with those roles. This permission cannot be constrained.	Reports - System

# Cornerstone HR

# e-days Absence Management Integration Enhancement

This functionality is available for UAT 3.

Prior to this enhancement, the e-days Absence Management Integration automatically sets the employee's manager as the first-step authorizer.

With this enhancement, a backend setting can be enabled to skip the auto setup of authorizers of the integration. This setting gives customers the option to bypass the auto setup step so administrators can log in to e-days and define the authorizers for their users.

The toggle is disabled by default. No action is required for existing customers using the e-days Absence Management integration to continue allowing the integration to set up the employee's manager as the first-step authorizer in e-days.

For more information about e-days Absence Management Integration, [see e-days Absence Management Integration](#).

## Implementation

This is a backend setting and cannot be enabled on the UI. Please open a GCS case to enable the setting.

## 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 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

## Forms Question Bank Field Title – Character Limit Increase

Prior to this enhancement, for Question Bank questions, the character limit for the Question field was 250 characters.

With this enhancement, the character limit for the Question field is now 500. Now, this field can contain very long questions, questions that may need an explanatory description, and appropriate translation. This character limit increase includes spaces.

**Note:** *This enhancement applies to Form Management only.*

This character limit increase applies to all of the following question types:

- Checkbox
- Date Picker
- Dropdown
- Numeric
- Radio Buttons
- Text

### How Does this Enhancement Benefit My Organization?

Customers can easily use the Question Bank fields without shortening the questions or trying to divide them into separate fields.

### Considerations

Existing questions can be adjusted to the higher character limit only if they are not already used in forms.

### Implementation

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

### Permissions

The following existing permissions apply to this functionality:

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

# Learning

# Learning Enhancements



## Accessibility Enhancements - July 2023

All companies aim to create an equitable learning experience. Improving accessibility allows all users to access and use the platform regardless of their ability to use a standard computing device.

With this release, Cornerstone is delivering accessibility enhancements that improve the user's ability to access and use the platform. The following accessibility enhancements have been included:

- Color Contrast Improvements
- Improvements to Browser Focus
- Improvements to Form Labels
- Improvements to Screen Reader Functionality
- Improvements to Instructions for Mandatory Fields
- Code Formatting Changes

### Color Contrast Improvements

The following color contrast improvements have been made:

- Learning Search -
  - The Show Only Mobile Enabled toggle
- Global Search -
  - The Star Rating icons
  - The section headings for the predictive search modal when searching through the navigation
  - The "Refine Your Search" text
- Print Transcript page -
  - The table header
- Transcript > External Training -
  - Error message for the Title field
- Curriculum Training Details page -
  - The "None" text under the "Details" column in the Curriculum section of the page
- Playlists -
  - The "Search Catalog" and "What did you Learn from this Content" text
- Connect -
  - The "Like" button and "Star" icon when selected
  - The "Search Tips" text when no search results are found
  - The table header for the "Topics" page and "Select Tags" modal
  - Various "Close" buttons for modals including those for "Spell Checker" and "Select Tag"
  - The text specifying how to "Drag and Drop" files for a reply
  - The border color for creating tags and attachments when a new post is created
  - The number of "Likes" for a post on the community page

- The search icon within the "Search within Topic" field

## Improvements to Browser Focus

The following improvements have been made for browser focus:

- Playlists -
  - The focus no longer goes to the top of the page on clicking the Cancel button on the Remove Training modal
  - The focus outline is improved for the playlist training controls
- My Checklists -
  - The focus is no longer cropped on the "Overall Progress" and "All Competencies"
- Transcript -
  - Background items no longer receive browser focus when the View Team slide out is open
  - The menu next to the main action button for each training can now be closed using the "Esc" key

## Improvements to Form Labels

Visual labels have been added to the following form fields:

- The "Upcoming Sessions" sorting drop-down in the Event Learning Detail page
- The "Playlist Title" field in the Copy Playlist modal
- The "Title" and "Session ID" fields in the Event Calendar
- The "Start Date" and "End Date" fields on the Add External Training page
- Transcript: On the "Run Transcript Report" page, an underline has been added to the "Clear" link
- Transcript: A duplicate Print button has been removed on the Print Transcript page

## Improvements to Screen Reader Functionality

The following improvements have been made for the screen reader functionality:

- Playlists -
  - The Private or Public checkbox
  - The content is updated when a link is pasted
  - The state for the buttons controlling the list display for playlists
  - The menu buttons are now uniquely identified
  - Images are now marked as decorative
- Connect -
  - The "Like" buttons are now uniquely identified
  - The pagination buttons in the "Add Tags" modal no longer require users to read the entire summary
  - On the topics and discussion postings pages, the page title is now more specific
- Create Event -

- The Vendor field can now be read by a screen reader

### **Improvements to Instructions for Mandatory Fields**

The following areas now have an instruction for a mandatory field:

- The "Create Playlist" and "Copy Playlist" modal
- The "Create Discussion" page in Connect
- The Request Exemption page on the Transcript

### **Code Formatting Changes**

The code format in the following areas has received changes and accessibility improvements:

- Learning Details -
  - The title element is no longer empty
- Connect -
  - On the Create Discussion page, the "Select Tag" modal is now correctly marked as a layout table
  - On the Discussion Posting Details page, items on the page are correctly identified as H1, H2, and H3 elements
  - On the Create Discussion Page, the text in the "Spell Checker" modal is correctly identified as a header
  - On the Discussion Posting Details page, the tags on a post are correctly identified as a list
  - On the Discussion Posting Details page, the page title is now unique
  - On the Topics tab, each topic is correctly identified as a heading
  - After completing a search in a community, the text identifying the search is correctly marked as a heading (H2)
  - In All Communities, headers are better identified in the list of results
- Playlists -
  - On the Edit Description modal, the "Edit Description" text is better identified as a header

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

Enhancements to accessibility allow all users of the platform to utilize features and functionality, regardless of the ability to use a standard computing device.

### **Implementation**

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

# Admin Compliance Dashboard - Curriculum

## Admin Compliance Dashboard - Curriculum

Customers need to check the effectiveness of training programs, versioning processes, and overall compliance so that the learners are assigned the right training version at the right time.

With this enhancement, the Admin Compliance Dashboard gives a quick overview of the versioning process and enables administrators to review the number of compliant and non-compliant learners and the number of learners who received the right version of the training.

The Admin Compliance Dashboard has the following features:

- It displays the pass versus fail percentage for Curriculum versioning and assignment.
- It shows details about failed Curricula for versioning/assignment on the flyouts.
- It contains a link to the existing Curriculum Versioning Dashboard page to investigate failed assignment details.

To access the Admin Compliance Dashboard, go to [ADMIN > TOOLS > LEARNING > ADMIN COMPLIANCE DASHBOARD](#).

### Considerations

- Admin Compliance Dashboard is available only for Curriculum Learning Object (LO) with the July '23 Release.
- If there is no data available for the day, the Dashboard displays an empty graph. It happens when no versioning has occurred in the system or when a very old date is selected.
- Although it is possible to select older dates, only the last 30 days of historical data is available in the Versioning Assignment Summary widget upon the initial release of this enhancement. The Versioning Summary Widget will show the data once the Versioning Redesign Enhancements are enabled in the portal.
- When viewing the Admin Compliance Dashboard on a lower resolution device such as a mobile phone, add the Date Picker entries manually by typing a date via keypad or keyboard.
- If a Curriculum is not assigned to an intended user, then the overall Curriculum assignment is displayed as a failure in the Assignment Failure Widget. For example, a Curriculum has to be assigned to 1000 Users. If it is assigned to 999 users and misses 1 user, then it is considered as a failure. The details about the failed users are available in the Curriculum Versioning Dashboard page for troubleshooting.

### Frequently Asked Questions (FAQs)

#### What are the possible reasons for Versioning failures?

Versioning failures can happen when there are infrastructure or system issues during the versioning process.

#### What should I do if there are Curriculum Versioning failures in the dashboard?

In case of versioning failures, please raise a case with Global Customer Support (GCS) with the exact Curriculum Learning Object IDs and titles for which the next version failed to process.

### Implementation

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

### Permissions

The following new permission applies to this functionality:

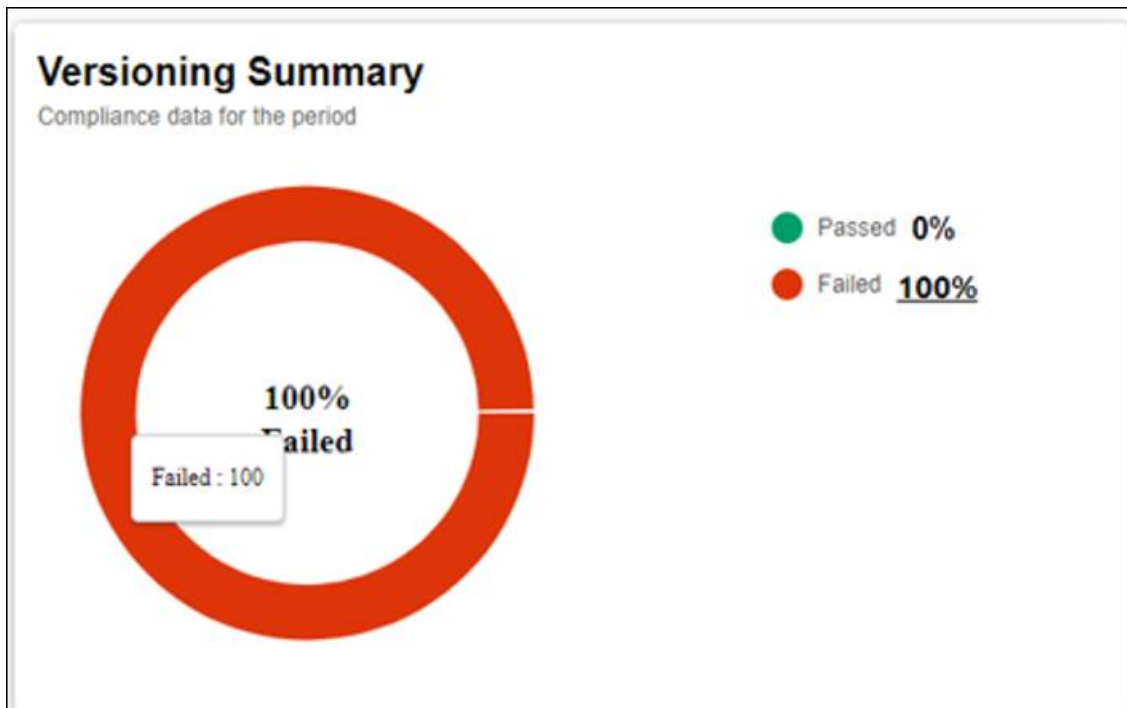
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Admin Compliance Dashboard - View	Grants ability to view the new Admin Compliance Dashboard. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

### Security Role

Upon release, the new Admin Compliance Dashboard - View permission is enabled by default for the System Administrator role.

## Versioning Summary and Flyout

- The Versioning Summary widget shows Curriculum Versioning fail and pass percentage as per the date selected along with a legend.
- Click the **FAILED PERCENTAGE** link on the legend to view failure details on the Versioning Details flyout.
- The Versioning Details flyout shows the Curriculum Title, Learning Object ID (LOID), and Version number of the current version. If a version fails to process, the flyout shows its previous version as the current version.
- A maximum of 30 results are available on the flyout. Pagination is available if the results are more than 30.
- Use the Search field to search for specific Curriculum titles.
- Click **SHOW MORE** to see the complete Curriculum title if the title is longer.



Versioning Details

Search For a Title

Title	ID	Version
CAV_AddOnlineCourse_2023041209554_8_5	83044dc3-8f6c-4af9-8be8-7d3734755dae	1
CAV_DeleteOC_20230412095548_46	41b8ae74-e41d-444e-a037-5102c0114323	1
CAV_NewFlow_PendingVersion_Expire_OnNearImmediateCA <a href="#">show more</a>	83c8e995-4219-4699-839c-97b200f2e8cf	1
CAV_StatusGroup_Completed20230412095610	9d74d240-5ad0-499f-9744-549b7dd897ab	1
CAV_NewFlow_Due_Date_20230412095620_87	33c2f3e8-3ab0-492a-8c49-80e90d9ead7	1
CAV_DeleteLO_DynamicAssignment_20230412095603_85	22817fe2-2877-46f9-9152-69f7599027b9	1

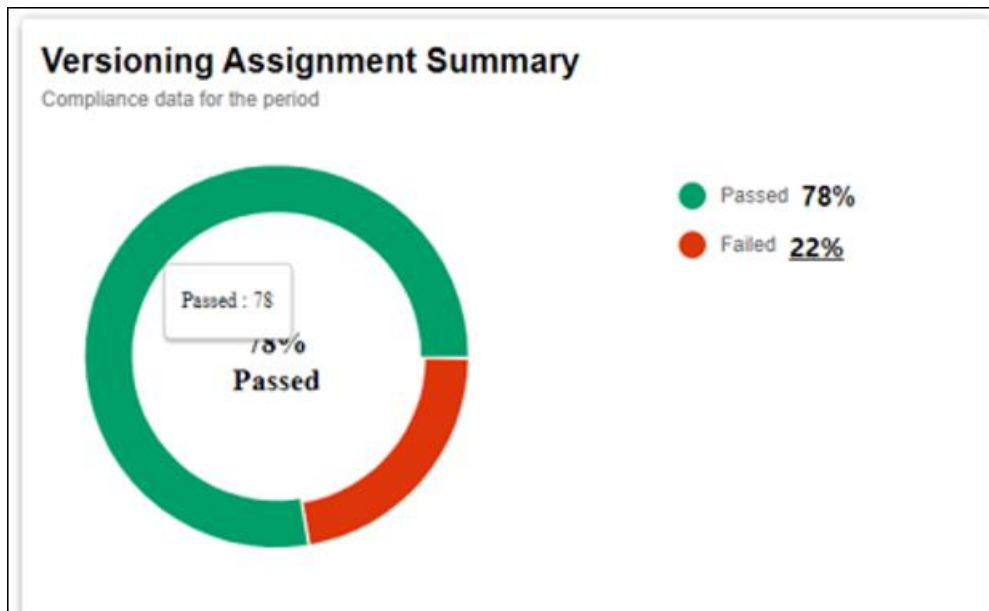
1 < >

(50 Results)



## Versioning Assignment Summary and Flyout

- The Versioning Assignment Summary widget shows Curriculum Versioning Assignment fail and pass percentage as per the date selected along with a legend.
- Click the **FAILED PERCENTAGE** link on the legend to view failure details on the Versioning Assignment Details flyout.
- The Versioning Assignment Details flyout shows Curriculum Title, Learning Object ID (LOID), and View Details link. Click **VIEW DETAILS** to open the Curriculum Versioning dashboard in a new tab to investigate further details for a specific Curriculum.
- A maximum of 30 results are available on the flyout. Pagination is available if the results are more than 30.
- Use the Search field to search for specific Curriculum titles.
- Click show more to see the complete Curriculum title if the title is longer.



Versioning Assignment Details X

Search For a Title  Search

Title	ID	
IA_Curriculum_20180524023248	7f57b816-fa7c-4171-a2a4-021b6788b64	<a href="#">View Details</a>
IA_Curriculum_20180524023248	dca2c99b-e09d-41e9-a169-af022577e103	<a href="#">View Details</a>
CAV_NewFlow_Due_Date_20230412095620_V2	9ccafb7e-9df0-41c5-9fab-05b0fb01b0b	<a href="#">View Details</a>
CAV_StatusGroup_InProgress_20230412095610_V2	39815a13-715a-48f9-a099-77c4af462393	<a href="#">View Details</a>
CAV_StatusGroupNotStarted20230412095610_V2	e979b3ac-876-4477-b0e7-dce19ebbbe11	<a href="#">View Details</a>
CAV_StatusGroup_InProgress_20230412095610_V2	da1e57a9-3ec3-4324-829c-b54b6d39ab71	<a href="#">View Details</a>

(6 Results) Cancel

## Curriculum Versioning Dashboard

View a curriculum's versioning settings and impacted users.

### Version Details

<b>Training Title</b> IA_Curriculum_20180524023248	<b>Created On</b> 06/10/2023, 02:17 PM	<b>Created By</b> William Sugh	<b>Training Type</b> Curriculum	<b>Effective Date</b> 06/10/2023, 02:17 PM	<b>Version Type</b> Replace
<b>Versions Selected</b> All versions	<b>Statuses Selected</b> Registered, In Progress	<b>Maintain Progress</b> Yes	<b>Assign New Occurrence</b> No	<b>Version</b> 6.0	<b>Assigned To</b> Users with previous version(s) on transcript
<b>Comments</b>					

### Permissions

Permission	Enabled
Has curricula version permission	True
Has curricula manage permission	True
Total Constraints	0

### Impacted Users

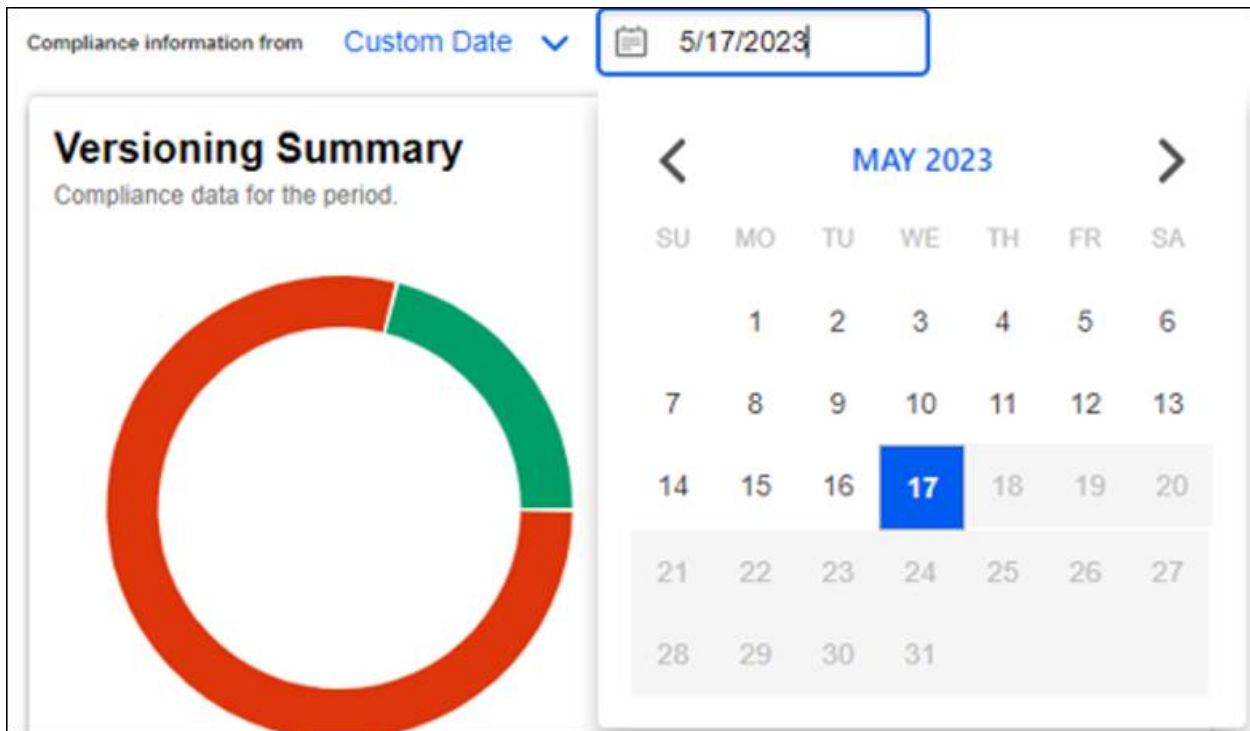
Search for a User  Filter

## Date Picker

For selecting the Versioning Compliance Information, the date picker feature is available with the following options:

- Today
- Yesterday
- Custom Date

The dashboard uses the administrator's time zone when it loads and shows the details about a specific day (24 hours). The future dates are grayed out on the date picker.



The screenshot displays a dashboard interface. At the top, it shows 'Compliance information from' followed by a dropdown menu set to 'Custom Date' and a date input field containing '5/17/2023'. Below this, the 'Versioning Summary' section features a donut chart with a red segment and a green segment, and the text 'Compliance data for the period.' To the right is a calendar for 'MAY 2023'. The calendar grid shows days from Sunday to Saturday. The date '17' is highlighted in blue, indicating the selected date. Days from the 18th onwards are grayed out, representing future dates.

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Compliance information from

Today 

## Versioning Su

Compliance data for the

Today

Yesterday

Custom Date

## **Assignment Logic Fix for Versioning with Multiple Dynamic Assignments**

There are scenarios where a user matches the criteria for two dynamic learning assignments that are created one after the other for the same training. In this example scenario, the second assignment does not assign the training because Assign New Occurrence is off. Later, the first dynamic assignment becomes inactive.

When the training in this scenario is versioned using the dynamic assignment option, the user is now calculated in the Impacted User list and the new version is assigned to the user. Previously, the user was not calculated in the Impacted User list and was not assigned the new version.

### **Implementation**

This logic fix is automatically enabled for all organizations.

## Auto-Completion of Videos (Early Adopter)

Prior to this enhancement, videos required the users to manually click 'Mark Complete' to complete a training after watching a video.

This enhancement allows videos to auto-complete without any user involvement after the user has watched the full video. The enhancement supports auto-completion for standalone videos and videos within curricula. When enabled, the auto-completion logic applies to all existing and new videos.

### How Does this Enhancement Benefit My Organization?

- Reduces data inconsistencies caused by users not marking videos as completed or preemptively marking videos as completed.
- The Managers and Instructors can be confident about users being fully trained on video content.
- It creates a frictionless experience where the user is not required to mark the videos as complete after watching.

### Considerations

- This is a portal-wide setting. When enabled, the auto-completion logic applies to all existing and new videos. It cannot be configured separately for individual videos.
- This enhancement encompasses both standalone videos and videos within curricula. (Curriculum Player 2.0 is currently not in scope).
- Videos in Programs and Cohorts are excluded and must be manually marked as complete.
- This enhancement supports HTML5, Akamai, and YouTube video players.
- It does not support Windows Media Player. Any video that uses Windows Media Player needs to be manually marked as complete.
- This enhancement does not prevent fast-forwarding.
- The percentage viewed to achieve a completion cannot be configured. Once the video's progress time in the progress bar reaches the video duration, the video is automatically marked as complete.
- This enhancement does not include video auto-completions within the Cornerstone CSX app.

### Implementation

This functionality is automatically enabled in Stage portals for all organizations using the Learning module and needs activation in Pilot and Production portals. To activate, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the Activate Video Auto-Completion section, click **ACTIVATE**.

### Permissions

The following existing permissions apply 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

**Certification Bulk Approval**

## Certification Bulk Approval

Prior to this enhancement, the certification owners needed to select and approve each approval request one by one.

With this enhancement, the Bulk Approval feature allows for the selection of multiple pending requests so that the certification owners can approve certification user approval requests in bulk.

The certification owners can bulk approve certifications from the Pending Requests page. To access the Pending Requests page, go to [CERTIFICATIONS > CERTIFICATION MANAGEMENT > MANAGE PENDING REQUESTS > PENDING TAB](#).

**Note:** The navigation instructions to access the Certification Management page may vary, as it is configurable by system administrators.

To bulk approve certification requests, follow these steps:

1. From the Pending Requests tab, select the checkbox next to each request you want to approve. You may also select the checkbox next to the **Requested By** label in the table header to select all listed users.
2. If desired, you may select the **ONLY SHOW SELECTED** checkbox to only display the requests that have been selected.
3. After selecting one or more than one request, the Approve button becomes available. Select **APPROVE**. After selecting the button, an Approve Request pop-up opens.
4. Provide any comments regarding the approval, and then select the Approve button to confirm the action.

### Certification Requests

View outstanding certification requests you must approve or deny.

**PENDING** PAST REQUESTS

Requested By:  Certification Title:  Request Type:  Request Date:   Include Inactive

0 of 56279 Selected  Only Show Selected

<input type="checkbox"/>	Requested By	Organizational Unit	User Status	Requested Date	Request Type	Certification Title	
<input type="checkbox"/>	Tatu, Debbie	ISolis Division (Division)	Active	5/8/2023 12:42 PM	Completion Request	PM Relative1	<a href="#">Approve</a>   <a href="#">Deny</a>   <a href="#">Manage</a>
<input type="checkbox"/>	John, Jim	Summerset Cost Center (Cost Center) Police Department (Division) USA (Location) Squad Officer (Position) Jingle Johnson (Manager)	Active	5/8/2023 12:17 PM	Completion Request	Leading with change	<a href="#">Approve</a>   <a href="#">Deny</a>   <a href="#">Manage</a>
<input type="checkbox"/>	John, Jim	Summerset Cost Center (Cost Center) Police Department (Division) USA (Location) Squad Officer (Position) Jingle Johnson (Manager)	Active	5/8/2023 11:37 AM	Completion Request	Fire Hazards	<a href="#">Approve</a>   <a href="#">Deny</a>   <a href="#">Manage</a>

## How Does this Enhancement Benefit My Organization?

This enhancement allows organizations to approve pending requests in bulk and allows the certification owners to better manage certification approval requests with improved searching and filtering. It saves time and increases productive hours of the certification owners.



## Considerations

- The new bulk Approve button is only interactable when selecting one or more items in the pending request list.
- Bulk Approval only supports up to 1000 approvals at a time. If there are more than 1000 pending requests that require approval, please select requests in batches of 1000. After approval of the first batch, select the next batch of pending requests for approval.
- Bulk denials are not supported.
- Selections made for bulk approval will reset if the filters are changed.
- Selection made for bulk approval is retained on the pending request page if the certification owner navigates to the past requests tab.
- The process of approving one user at a time for a certification has not been impacted and still can be used.

## Implementation

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

## Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Bulk Approval - Manage	Grants the ability to bulk approve certification approval requests. If the administrator or certification owner does not have this permission, the Approve button for bulk approval will not display on the Manage Pending Requests page. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Owner	Grants user ability to act as the certification owner, which enables them to view and approve requests for the certification, manage users in the certification, and edit the due date/expiration date for users in the certification. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

## Security Roles

Upon release, the new Certification - Bulk Approval - Manage permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

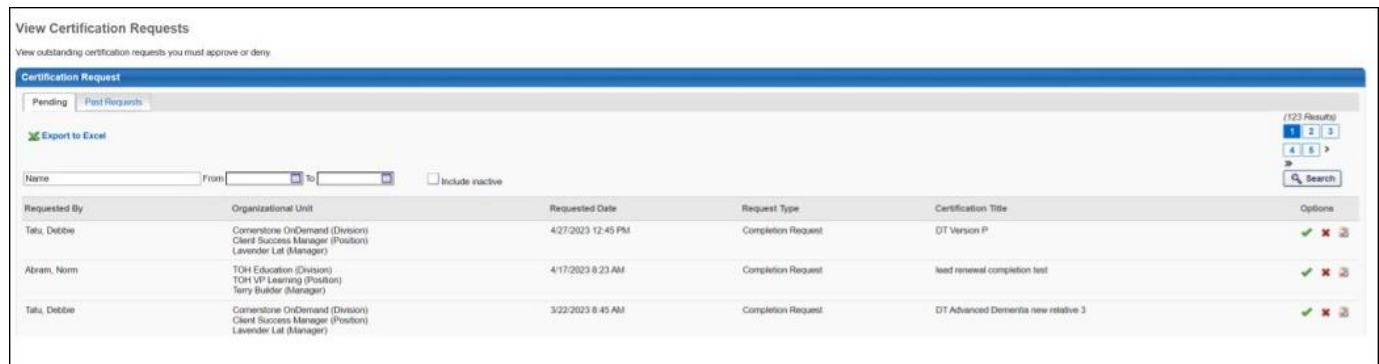
## Pending Requests Page Enhancements

The following enhancements have been made to the Pending Requests page:

- A new filter for Request Type
- A revised Date filter
- The ability to search by Requested By, Username, Email, User ID, Date, and Certification Title
- A new column to display the user status (both Active and Inactive)
- The ability to search by certification title
- The ability to select all pending requests
- A new **ONLY SHOW SELECTED** option that allows the administrator to only view the selected pending requests
- The ability to show 20, 50, 100, 200, 300, 400, 500, 600, 700, 800, 900 or 1000 rows on one page with a rows per page selector on the bottom right. The rows per page selector choice is maintained if the administrator leaves the page during the same browser session
- The ability to view the total number of pending requests selected. The total number of pending requests selected is displayed under the Pending tab
- The ability to approve all selected pending requests in bulk using the new Bulk Approval button

To access the Pending Requests page, go to [CERTIFICATIONS > CERTIFICATION MANAGEMENT > MANAGE PENDING REQUESTS > PENDING TAB.](#)

### Before



The screenshot shows the 'View Certification Requests' interface. At the top, it says 'View outstanding certification requests you must approve or deny'. Below this is a 'Certification Request' header with tabs for 'Pending' and 'Past Requests'. There is an 'Export to Excel' button and a search bar. The table below lists three pending requests with columns for Requested By, Organizational Unit, Requested Date, Request Type, Certification Title, and Options.

Requested By	Organizational Unit	Requested Date	Request Type	Certification Title	Options
Tatu, Debbie	Comenstone OnDemand (Division) Client Success Manager (Position) Lavender, Lat (Manager)	4/27/2023 12:45 PM	Completion Request	DT Version P	✓ ✗ 🔄
Altain, Norm	TOH Education (Division) TOH VP Learning (Position) Terry Builder (Manager)	4/17/2023 9:23 AM	Completion Request	lead renewal completion test	✓ ✗ 🔄
Tatu, Debbie	Comenstone OnDemand (Division) Client Success Manager (Position) Lavender, Lat (Manager)	3/22/2023 8:45 AM	Completion Request	DT Advanced Dementia new relative 3	✓ ✗ 🔄

# After

## Certification Requests

View outstanding certification requests you must approve or deny.

**PENDING** PAST REQUESTS

Requested By:  Certification Title:  Request Type:  Request Date:   Include Inactive

0 of 56279 Selected  Only Show Selected

<input type="checkbox"/>	Requested By	Organizational Unit	User Status	Requested Date	Request Type	Certification Title	
<input type="checkbox"/>	Tatu, Debbie	ISolis Division (Division)	Active	5/8/2023 12:42 PM	Completion Request	PM Relative1	<a href="#">Approve</a>   <a href="#">Deny</a>   <a href="#">Manage</a>
<input type="checkbox"/>	John, Jim	Summerset Cost Center (Cost Center) Police Department (Division) USA (Location) Squad Officer (Position) Jingle Johnson (Manager)	Active	5/8/2023 12:17 PM	Completion Request	Leading with change	<a href="#">Approve</a>   <a href="#">Deny</a>   <a href="#">Manage</a>
<input type="checkbox"/>	John, Jim	Summerset Cost Center (Cost Center) Police Department (Division) USA (Location) Squad Officer (Position) Jingle Johnson (Manager)	Active	5/8/2023 11:37 AM	Completion Request	Fire Hazards	<a href="#">Approve</a>   <a href="#">Deny</a>   <a href="#">Manage</a>

## Past Requests Page Enhancements

The following enhancements have been made to the Past Requests page:

- New look and feel
- Search by requested by username, ID, or email address
- Search by certification title
- Filter by Request Type
- Pagination moved to the bottom
- A new filter for Request Date
- A View Details link beside each item. The View Details opens a flyout that includes:
  - User Status
  - Organizational Units
  - Approval or denial comments

To access the Past Requests page, go to **CERTIFICATIONS > CERTIFICATION MANAGEMENT > MANAGE PENDING REQUESTS > PAST REQUESTS**.

### Before

The screenshot shows a table with 9 columns: Requested By, Organizational Unit, Request Date, Request Type, Certification Title, Owner, Decision, Decision Date, and Comment. Two rows of data are visible, both for 'Tatu, Debbie' with 'Leadership Series A' certification titles. The interface includes a 'Pending' tab, 'Export to Excel' button, and pagination controls for 1371 results.

Requested By	Organizational Unit	Request Date	Request Type	Certification Title	Owner	Decision	Decision Date	Comment
Tatu, Debbie	Comenstone OnDemand (Division) Client Success Manager (Position) Lavender Lil (Manager)	4/27/2023 12:49 PM	Completion Request	Leadership Series A	Tatu, Debbie	Granted	4/27/2023	
Tatu, Debbie	Comenstone OnDemand (Division) Client Success Manager (Position)	4/27/2023 12:47 PM	Completion Request	Leadership Series A	Tatu, Debbie	Granted	4/27/2023	

### After

The screenshot shows a more modern interface with search filters for 'Requested By', 'Certification Title', 'Request Type', and 'Request Date'. The table has 7 columns: Requested By, Requested Date, Request Type, Certification Title, Owner, and Decision. Each row includes a 'View Details' link. The data shows requests from 'John, Jim', 'Employee, Galen', and 'John, Harry' for various certification titles like 'One time leading' and 'PM Relative 3'.

Requested By	Requested Date	Request Type	Certification Title	Owner	Decision	
John, Jim	5/8/2023 12:17 PM	Completion Request	One time leading	Tatu, Debbie	Granted on 5/10/2023 1:48 AM	<a href="#">View Details</a>
Employee, Galen	5/8/2023 12:50 PM	External Training	PM Relative 3	Tatu, Debbie	Granted on 5/8/2023 12:51 PM	<a href="#">View Details</a>
John, Harry	5/8/2023 12:14 PM	Completion Request	One time leading	Tatu, Debbie	Granted on 5/8/2023 12:17 PM	<a href="#">View Details</a>
John, Harry	5/8/2023 12:11 PM	Completion Request	Leading with change	Tatu, Debbie	Granted on 5/8/2023 12:13 PM	<a href="#">View Details</a>

## Certification Bypass Approval for Expired Completion Requests

Expired certifications can now be configured to bypass the approval process for completion with the help of this new feature.

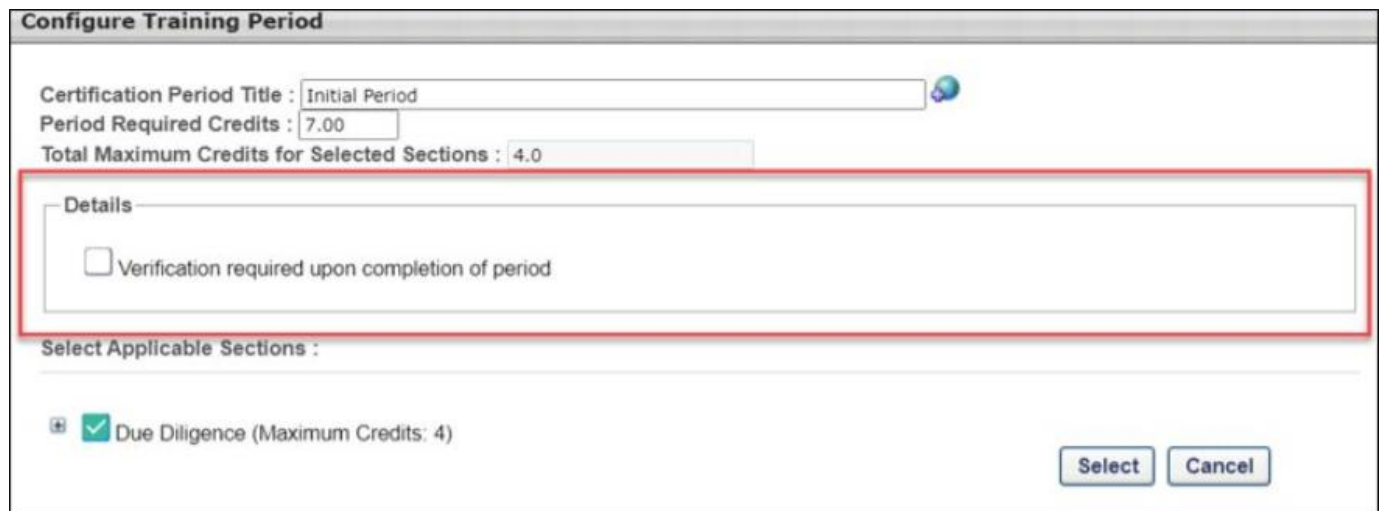
Prior to this enhancement, when a candidate had to renew an expired certification, it generated a completion verification approval request, which was sent to the administrators and certification owners for approval.

With this enhancement, the administrators and certification owners can disable the requirement for an approval request for the completion of an expired certification. If disabled, the expired certifications do not require completion approvals if the user completes all certification renewal requirements, thus bypassing the approval workflow.


The key features of this enhancement are as follows:

- There is a new setting called **VERIFICATION REQUIRED UPON COMPLETION OF EXPIRED PERIOD** which is enabled by default. When the verification setting is disabled, the completion approval request for an expired certification is not generated, thus bypassing the need for approval.
- An administrator or a certification owner can enable or disable the verification setting on one or all certification periods depending on certification renewal requirements.

### Before



**Configure Training Period**

Certification Period Title : Initial Period 

Period Required Credits : 7.00

Total Maximum Credits for Selected Sections : 4.0

**Details**

Verification required upon completion of period


Select Applicable Sections :

Due Diligence (Maximum Credits: 4)

Select Cancel

## After

### Configure Training Period

Certification Period Title :  

Period Required Credits :

Total Maximum Credits for Selected Sections :

Details

Verification required upon completion of expired period  
 Verification required upon completion of period

Select Applicable Sections :

Section 1 (Maximum Credits: 2.00)


To access this feature, go to [ADMIN > TOOL > LEARNING > CATALOG MANAGEMENT > CERTIFICATIONS > CREATE A NEW CERTIFICATION > SCHEDULING](#).

**Note:** The navigation instructions to access the Certification Management page may vary, as it is configurable by system administrators.

### Configuring the certification completion approval

Expired certification completion will require a completion approval:

### Configure Training Period

Certification Period Title :  

Period Required Credits :

Total Maximum Credits for Selected Sections :

Details

Verification required upon completion of expired period  
 Verification required upon completion of period

Select Applicable Sections :

Section 1 (Maximum Credits: 2.00)

Expired certification completion will not require a completion approval:

**Configure Training Period**

Certification Period Title :

Period Required Credits :

Total Maximum Credits for Selected Sections :

Details

Verification required upon completion of expired period

Verification required upon completion of period

Select Applicable Sections :

Section 1 (Maximum Credits: 2.00)

### How Does this Enhancement Benefit My Organization?

This enhancement allows users to renew their expired certification immediately without waiting for completion approval. It also allows managers to better track the current certification statuses without waiting for administrators to approve.

### Considerations

- All completion approval requests that have already been generated still need to be approved. The setting can be changed at any time for any existing certifications, and it applies to any expired training completion approvals that are generated after the setting is changed.

### Implementation

This functionality is automatically available for all organizations using the Learning module. The setting is enabled by default for all certifications and certification periods which maintains the existing expired completion approval behavior. To remove the completion approval for expired training, edit your certifications and disable this option

### Permissions

The following existing permissions apply to this functionality:

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

# Certification Enrollment and Removal History Enhancements



## Certification Enrollment and Removal History Enhancements

Prior to this enhancement, the administrators had to check or uncheck proxy enrollment settings by visiting different pages to configure or enroll users in certifications. Failing to update a setting resulted in over-enrollment or under-enrollment of certifications.

With this enhancement, the following new functionalities and user interface are added to the Proxy Enrollment for Certification page:

- **Dynamic Re-enrollment and Dynamic Removal Toggles** - The administrators can now choose dynamic removal and enrollment options when creating a dynamic certification proxy without visiting the enrollment page to change the option.
- **Include Subordinate** - When creating a new certification proxy enrollment, an administrator no longer needs to uncheck Include Subordinate as the checkbox is unchecked by default to prevent over-enrollment of certifications.
- **Proxy Enrollment page with new Certification UI** - The Proxy Enrollment for Certification page has a new user interface.

- **Export Removal History** - Export removal history to Excel in the certification management removal history section by clicking the **EXPORT TO EXCEL**. To access Export to Excel, go to **CERTIFICATION MANAGEMENT > MANAGE CERTIFICATIONS > VIEW USERS** (under Options), select **VIEW DETAILS** for a user, and then view the removal history section. The Export to Excel for the Removal History can also be accessed from the user transcript by clicking on Manage for the certification and then viewing the Removal History section.

REMOVAL DATE	REMOVED BY	REMOVAL COMMENTS	REMOVAL METHOD	REMOVAL PROXY ID	CERTIFICATION STATUS	CERTIFICATION USER STATUS	CERTIFICATION PERIOD	EXPIRATION DATE	DUE DATE	ASSIGNMENT DATE	ASSIGNMENT METHOD
The most recent 10 rows are displayed. To export all removal history <a href="#">Export to Excel</a>											

## How Does this Enhancement Benefit My Organization?

- This enhancement saves time and reduces the likelihood of errors by configuring preferences during proxy creation.
- Allows viewing the most recent removal history and exporting the previous history to Excel.

- Reduces the number of clicks and improves administrator productivity.

## Considerations

- The dynamic re-enrollment and dynamic removal settings only appear for dynamic proxy creation.
- Though this enhancement allows for these options to be selected during the dynamic proxy process, the dynamic re-enrollment and dynamic removal toggles can still be configured after a proxy is created.
- The Include Subordinate setting applies to all proxy creation for standard, certified, and dynamic proxies.
- The removal history table displays 10 recent records. The following text is added, "The most recent 10 rows are displayed."

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Enroll Certified	Grants administrator ability to enroll certified users into a certification. This is an administrator permission.	Learning - 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
Proxy Enrollment for Certification - Dynamic Re-enrollment	Grants access to view and update the Dynamic Re-enroll toggle for certifications on the Proxy Enrollment page. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Proxy Enrollment for Certification – Remove Dynamic	Grants administrator ability to create a proxy enrollment for certifications in which users are dynamically removed. This is an administrator permission.	Learning - Administration
Proxy Enrollment/Assignment Schedule Time - Manage	Grants ability to configure a Processing Start Time when creating a Proxy Enrollment/Assignment for Training and/or for Certifications. The Processing Start Time is the time of	Learning - Administration

	day that the Proxy Enrollment/Assignment will start to process users. This is an administrator permission.	
Assignment Tool - Dynamic Reassignment	Grants ability to enable/disable Dynamic Re-assignment for an assignment after submission. When Dynamic Re-assignment is enabled, users that meet the User Criteria again (after previously being dynamically removed) are re-assigned. This permission is dependent on the Assignment - Standard, Dynamic - Standard and Dynamic, and Dynamic Assignment - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Assignment Tool - Dynamic Removal	Grants ability to enable/disable Dynamic Removal from within the Learning Assignment create workflow and/or the Assignment Summary page. When Dynamic Removal is enabled, users that no longer meet the User Criteria are removed from the Learning Assignment. This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

## Dynamic Re-enrollment and Dynamic Removal Toggles

Prior to this enhancement, the dynamic re-enrollment and dynamic removal toggles could be enabled only after the creation of a proxy in the proxy list page.

With this enhancement, administrators can now select dynamic removal and re-enrollment options when creating a dynamic certification proxy without visiting the enrollment page to change the option.

**Enable Dynamic Re-enrollment** - When creating a new certification dynamic proxy, the administrator can enable the Enable Dynamic Re-enrollment toggle. This toggle is disabled by default. The Enable Dynamic Re-enrollment toggle is only visible if the administrator has the Proxy Enrollment for Certification - Dynamic Re-enrollment security permission.

**Enable Dynamic Removal** - When creating a new certification dynamic proxy, the administrator can enable the Enable Dynamic Removal toggle. This toggle is disabled by default. The Enable Dynamic Removal toggle is only visible if the administrator has the security permission - Assignment Tool - Dynamic Removal.

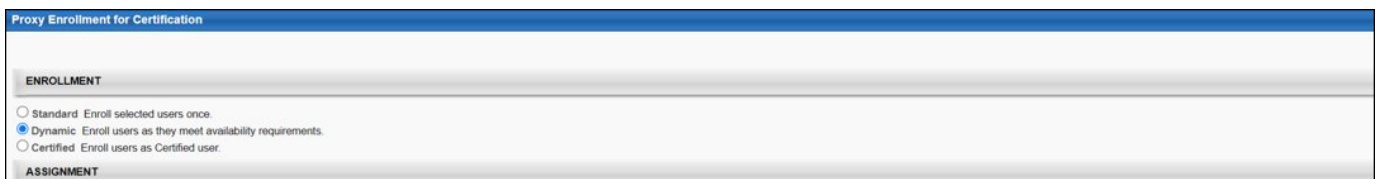
To access Dynamic Re-enrollment and Dynamic Removal for certifications, follow the steps:

1. Go to [ADMIN > TOOL > LEARNING > CERTIFICATION PROXY ENROLLMENT > ADD NEW](#).
2. In the Manage Proxy Enrollment page, click **ADD NEW USERS** under **Options**. The features are available on the Proxy Enrollment for Certification page.

When Dynamic Removal or Dynamic Re-enrollment is enabled during proxy creation, it is captured in the modification history of the proxy. The modification history displays the following:

- Modified by
- User ID (user's last name, first name)
- Date time
- Action
- Time Zone

## Before



Proxy Enrollment for Certification

**ENROLLMENT**

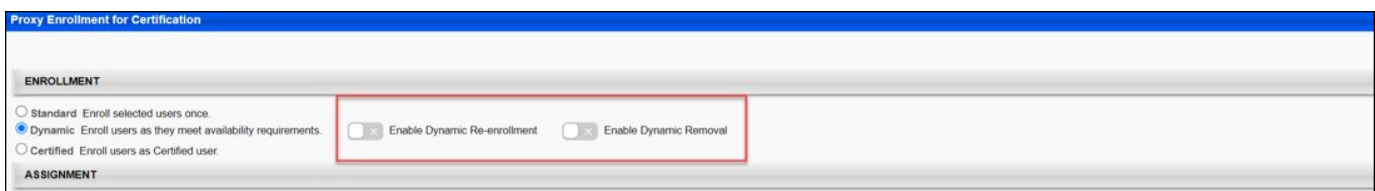
Standard: Enroll selected users once.

Dynamic: Enroll users as they meet availability requirements.

Certified: Enroll users as Certified user.

**ASSIGNMENT**

## After



Proxy Enrollment for Certification

**ENROLLMENT**

Standard: Enroll selected users once.

Dynamic: Enroll users as they meet availability requirements.

Certified: Enroll users as Certified user.

Enable Dynamic Re-enrollment

Enable Dynamic Removal

**ASSIGNMENT**

## Permissions

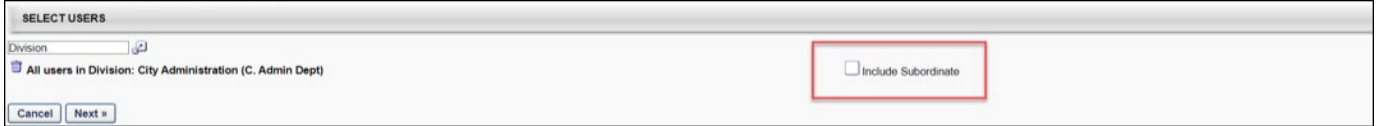
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Proxy Enrollment for Certification - Dynamic Re-enrollment	Grants access to view and update the Dynamic Re-enroll toggle for certifications on the Proxy Enrollment page. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Proxy Enrollment for Certification – Remove Dynamic	Grants administrator ability to create a proxy enrollment for certifications in which users are dynamically removed. This is an administrator permission.	Learning - Administration
Assignment Tool - Dynamic Reassignment	Grants ability to enable/disable Dynamic Re-assignment for an assignment after submission. When Dynamic Re-assignment is enabled, users that meet the User Criteria again (after previously being dynamically removed) are re-assigned. This permission is dependent on the Assignment - Standard, Dynamic - Standard and Dynamic, and Dynamic Assignment - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Assignment Tool - Dynamic Removal	Grants ability to enable/disable Dynamic Removal from within the Learning Assignment create workflow and/or the Assignment Summary page. When Dynamic Removal is enabled, users that no longer meet the User Criteria are removed from the Learning Assignment. This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

## Include Subordinate

Prior to this enhancement, the Include Subordinate checkbox was checked by default when selecting availability for a proxy.

With this enhancement, an administrator no longer needs to uncheck Include Subordinate when creating a new certification proxy enrollment as the checkbox is unchecked by default to prevent over-enrollment of certifications.



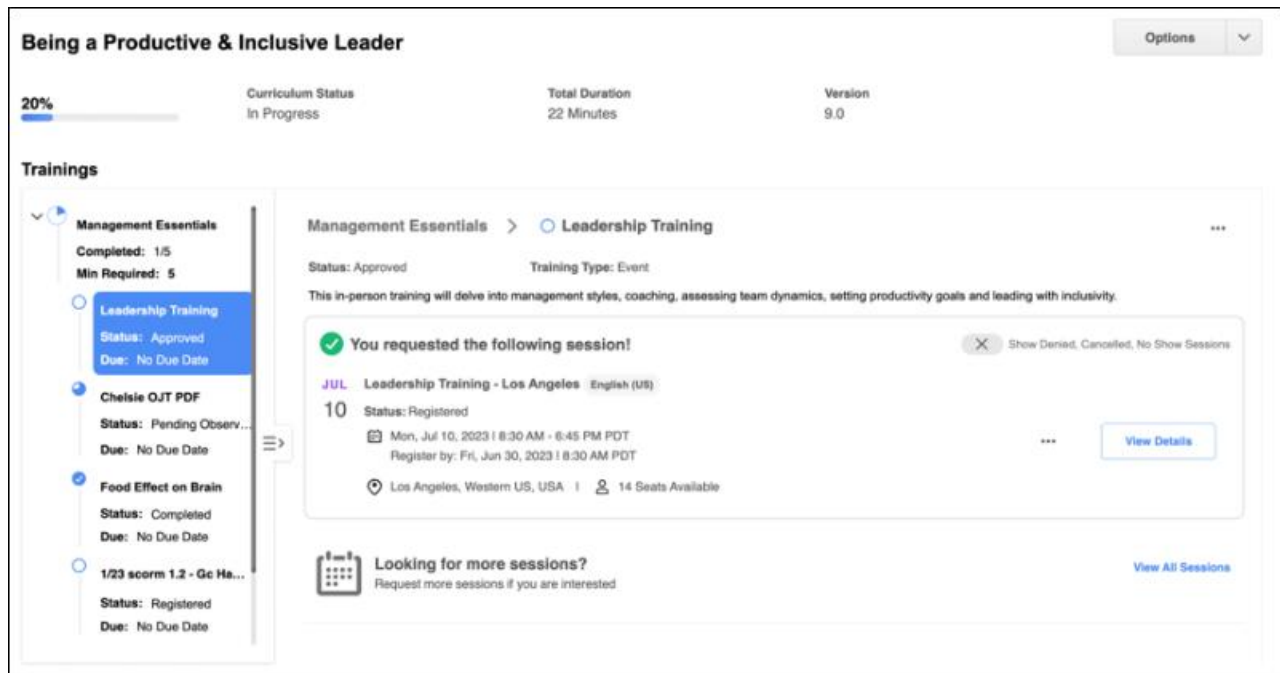
The screenshot shows a dialog box titled "SELECT USERS". At the top left, there is a "Division" text box with a search icon. Below it, a tree view shows "All users in Division: City Administration (C. Admin Dept)". On the right side, there is a checkbox labeled "Include Subordinate" which is currently unchecked. A red rectangular box highlights this checkbox. At the bottom left, there are two buttons: "Cancel" and "Next »".

## Curriculum Player 2.0 - Milestone 3 (Open Beta)

Prior to this enhancement, the legacy Curriculum Player involved many pop-ups and stale workflows. With this enhancement, Curriculum Player 2.0 provides users with a straightforward path to complete their curriculum. The Curriculum Player 2.0 is fine-tuned to provide a modern UI while addressing complex workflows.

The key features of Curriculum Player 2.0 Milestone 3 include:

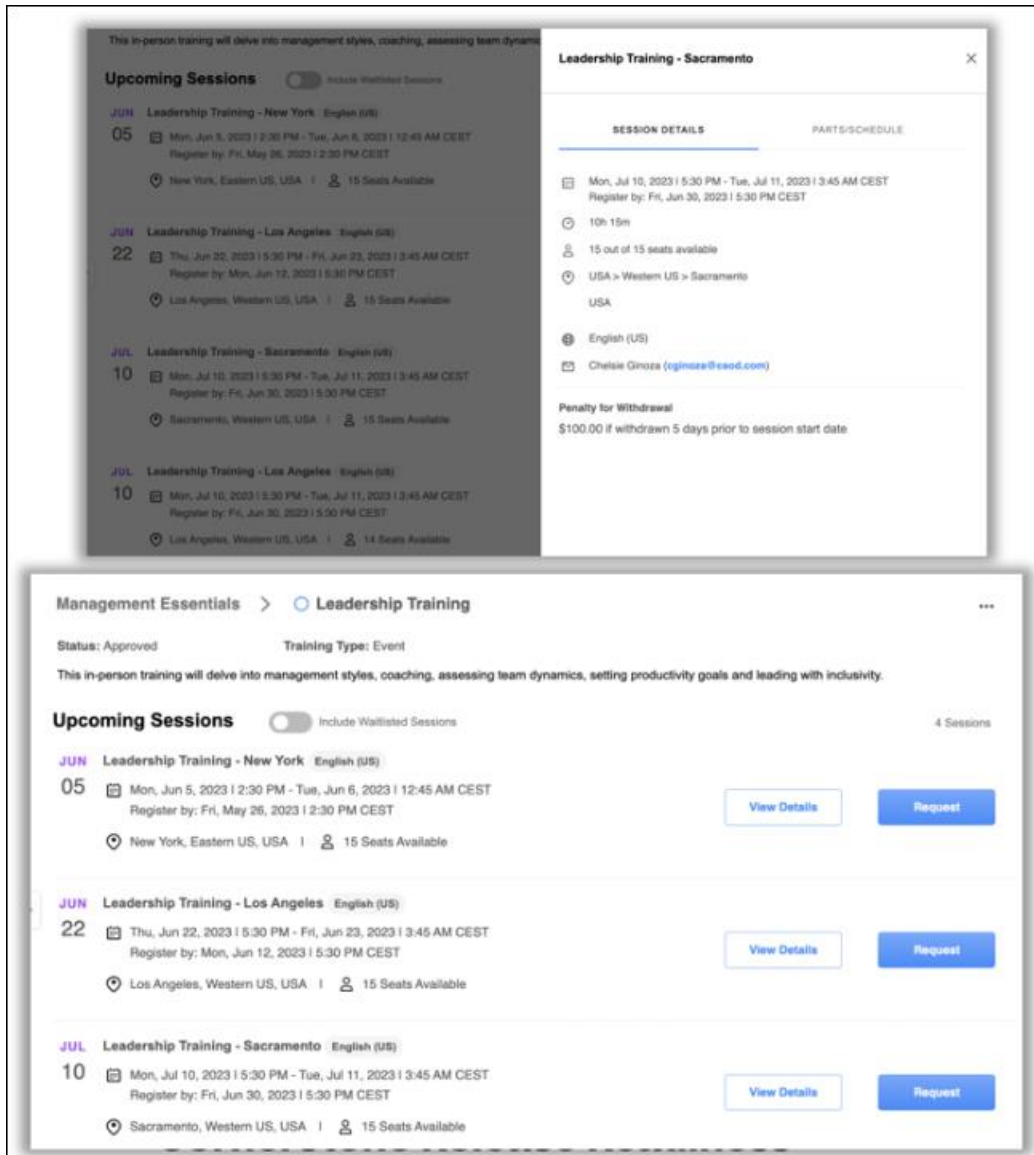
- Support for Event and Sessions
- Notes
- Handling additional transcript statuses
- Incorporating Beta feedback



### Support for Event and Sessions

- Inline list view of available sessions with essential metadata -
  - Date and session start and end time
  - Registration deadline
  - Location
  - Seats available
- Ability to view session details through a flyout -
  - Duration
  - Languages available
  - Training contact
  - Resources
  - Withdrawal or No Show penalties
  - Parts Schedule

- Requested sessions display inline with an option to view more sessions.
- Sessions in Denied, Canceled, or No-Show statuses are hidden by default but can be viewed through a toggle switch.



## Notes

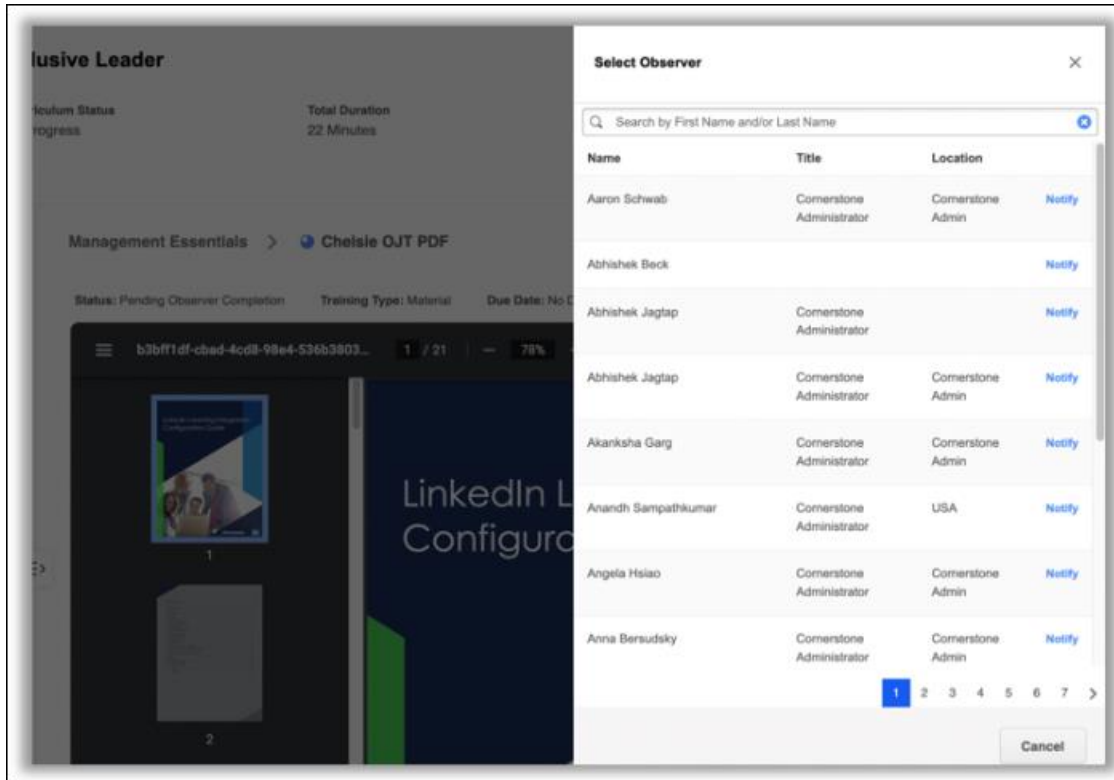
- Notes display inline
- Supports rich text formatting

## Handling additional transcript statuses

- On-the-Job Training Materials -
  - Support for the 'Notify Observer' workflow in a flyout
- Request Exemption -



- Ability to request an exemption for child training in a flyout



## Incorporating Beta feedback

- Clicking anywhere on a section in the table of contents expands the section to reveal nested trainings.
- Updated section circle progress icon to include a checkmark once section contents are completed.
- Improvement to **EXIT COURSE** button that terminates an online course session.

## How Does this Enhancement Benefit My Organization?

- Improved workflows to minimize administrative involvement with functionality or process questions.
- Increase in curriculum engagement.
- Intuitive design that guides users through training completions
- A modern UI that promotes engagement and allows for an intuitive learning journey.

## Implementation

This functionality is only available in Stage portals for all organizations. The functionality is automatically disabled and requires self-activation. To activate, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the Activate Curriculum Player 2.0 section, click **ACTIVATE**. If already enabled in Stage, no action is required to utilize the new features.

## Permissions

The following existing permissions apply 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

## Custom Email Localization

Prior to this enhancement, the administrators had to create Learning Management System (LMS) custom email templates for every language active in a portal, as there was no default language logic for localizing custom emails.

With this enhancement, the administrators can localize custom emails without having to set up and maintain custom email templates for every language active in a portal. The system leverages the default language logic and enables a single custom email template for multiple languages. It also allows administrators to change the default language for a custom email.

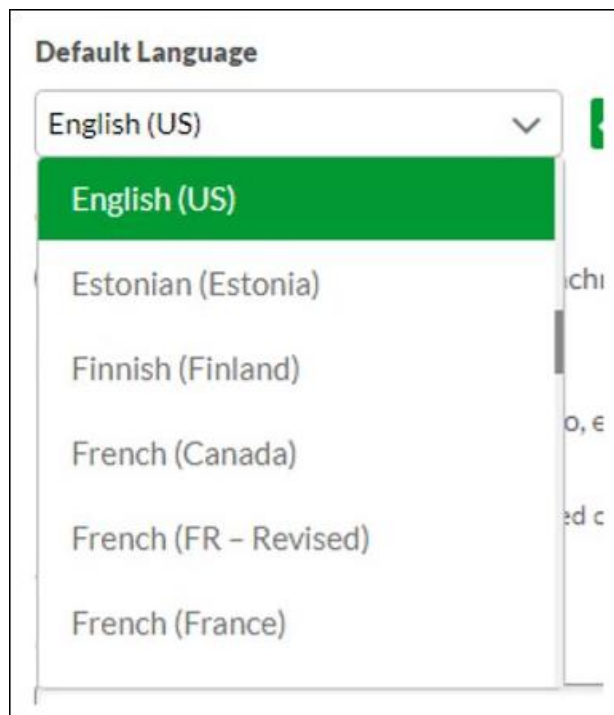
The following areas allow the localization of custom emails:

- Learning Object (LO) custom emails
- Learning assignment custom emails
- Certification custom emails
- Training Units custom emails
- Training Plan custom emails

The enhancement requires no new permissions or system configuration and does not impact existing custom emails in the system. The administrator can still modify the existing setting and localize custom emails.

### How does the localization operate?

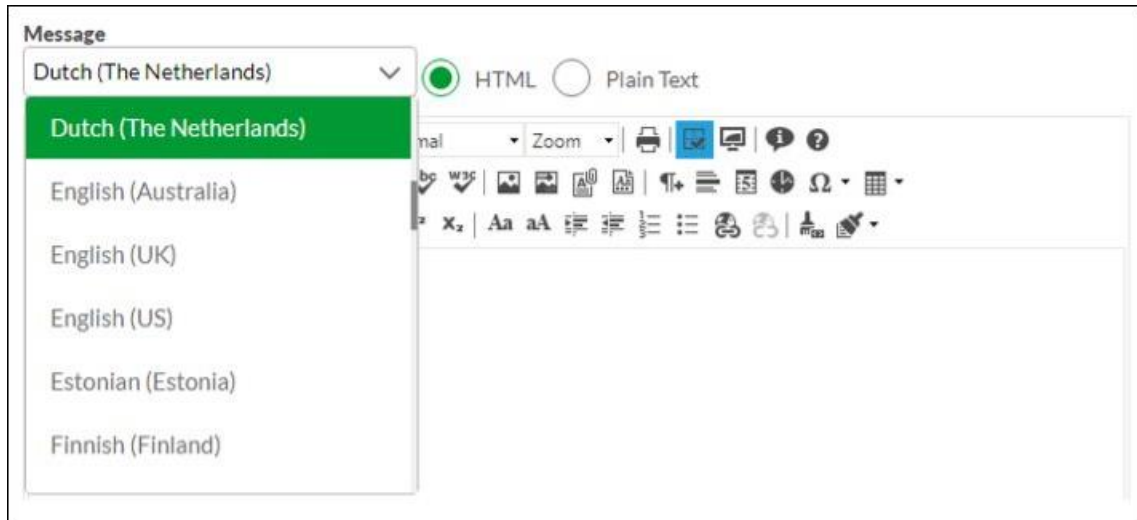
Custom email localization operates in the same way as standard/system emails operate. Email template elements like email title, subject, and body/text can be provided in multiple languages with the same email template. Administrators can change the default language setting of a custom email via the language dropdown as shown.



Localize the email title, subject, and body/text by accessing the globe icon or through the language dropdown as in the standard/system email feature.

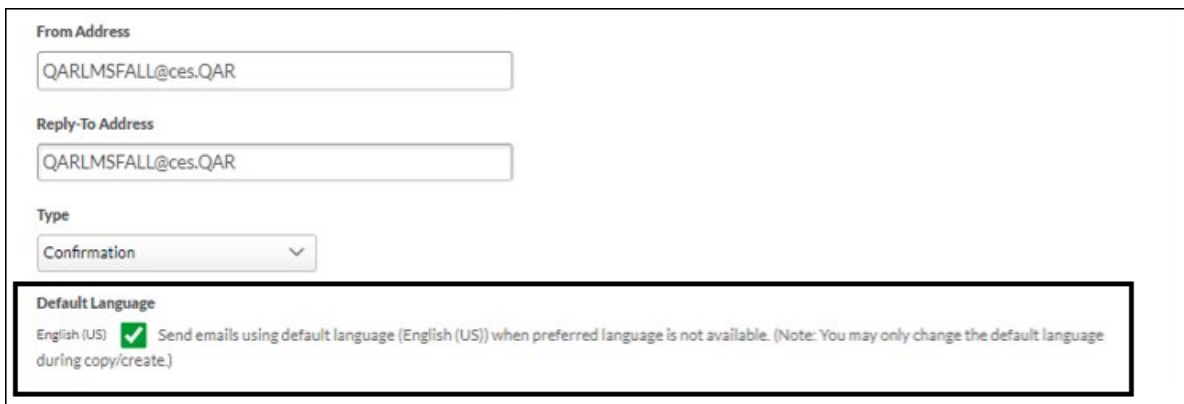


The screenshot shows a form field labeled "Email Title" containing the text "ILT Register 23". To the right of the text input is a small globe icon, which is used to access localization options.



The screenshot displays a "Message" editor interface. A language dropdown menu is open, showing several options: "Dutch (The Netherlands)" (highlighted in green), "English (Australia)", "English (UK)", "English (US)", "Estonian (Estonia)", and "Finnish (Finland)". To the right of the dropdown, there are radio buttons for "HTML" (selected) and "Plain Text". Below these are various icons for email actions like "Send", "Print", and "Zoom".

The enhancement also includes a checkbox called **SEND EMAILS USING DEFAULT LANGUAGE WHEN PREFERRED LANGUAGE IS NOT AVAILABLE** which sends emails in the default language if no preferred language is set.



The screenshot shows an email configuration form with the following fields: "From Address" (QARLMSFALL@ces.QAR), "Reply-To Address" (QARLMSFALL@ces.QAR), and "Type" (Confirmation). A section titled "Default Language" is highlighted with a black border. It contains a checked checkbox next to "English (US)" and the text: "Send emails using default language (English (US)) when preferred language is not available. (Note: You may only change the default language during copy/create.)"

When the admin is setting up a localized custom email and does not fill one of the localized fields, an error message appears indicating which language or language entries are missing.

 The following languages are not consistent across the Email Title, Subject, and Message fields. Please make corrections and save again: Dutch (The Netherlands).

## How Does this Enhancement Benefit My Organization?

- It reduces the admin's efforts and time by allowing them to manage multiple languages within one custom email template, thereby improving the productivity and usability of Learning custom emails.
- It ensures recipients receive emails in the default language if the preferred language of the user is not available.
- Fewer emails to maintain and better oversight in the custom email setup.
- Troubleshooting is easier with languages being handled in a single localized email instead of one email per language.
- Users can receive emails in their preferred language.
- It ensures users do not miss any communication on LOs and tasks.

## Use Cases

**Use Case 1:** A company has 25 languages active on its portal. A learning assignment is available in 4 languages which are English (US), English UK, French (France), and Spanish (Spain). To set up a custom email template for the assignment, the admin includes those 4 languages with English (UK) as the default language and checks Send emails using default language when preferred language is not available.

**Use Case 2:** A user with a system language set as English (US) receives English (US) email content. However, a user with a system language set as Dutch (The Netherlands) receives the email content in the default language which is English (UK).

## Considerations

- The custom emails for Learning work in both new and old UI. There is no difference in the feature behavior.
- The custom emails configured prior to this enhancement continue to work as before.
- For Learning Assignments, the ad hoc emails do not benefit from this feature.

## Frequently Asked Questions (FAQs)

### Why is ad hoc email for Learning assignments is excluded?

Ad hoc emails can only be sent in one language and do not support the default language logic used in standard and new custom emails.

### The feature is on by default; can I switch it off?

No, the feature is enabled by default. But if you don't want to use the localization, then it is still your choice. However, you may quickly find benefits in using localization.

### Why would it be important to start using custom email localization?

It not only reduces the work of maintaining the custom emails you have set up, but also reduces the email queues especially when you rely heavily on custom emails for Learning. Just think about your large learning assignments.

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

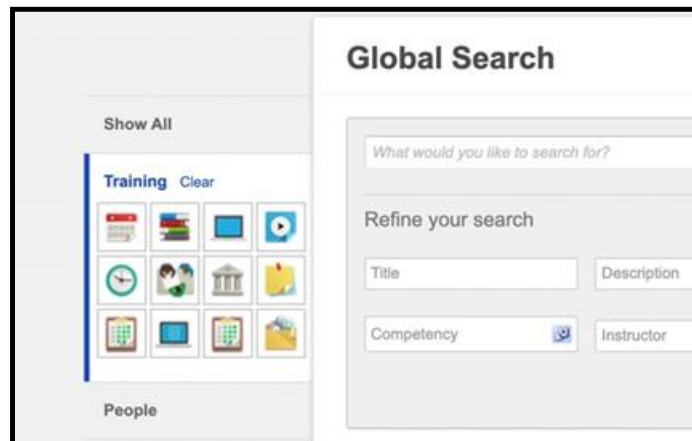
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	<p>Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests 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
Emails by Learning Object - Manage	<p>Grants access to create, edit and delete custom email templates/triggers at the learning object level. When viewing Course Console, this permission also grants ability to view and manage email triggers at the LO level. This permission works in conjunction with the Course Catalog - Update and Course Catalog - View permissions. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. This is an administrator permission.</p>	Learning - Administration
Assignment Tool - Email Settings - Manage	<p>Grants ability to manage email settings when creating a Learning Assignment. This includes the ability to select all four email settings, set up Custom Emails (create new emails and set existing emails as active/inactive), set up Ad-Hoc Emails, and enable/disable Assign Training and Register Training email triggers when Training Specific Emails is selected. This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. If this permission is constrained, then only users within the constraints will receive the emails. This is an administrator permission.</p>	Learning - Administration

## Global Search (Training) - Enhanced Search Default Preference

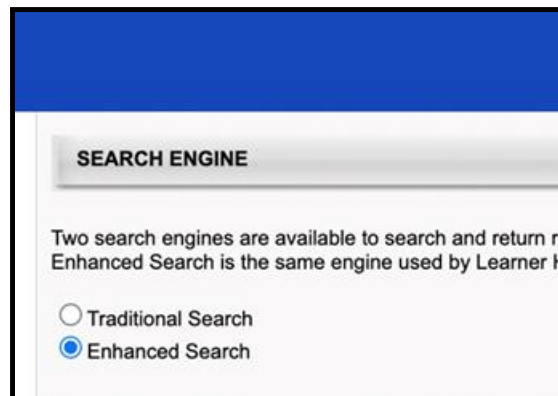
Prior to this enhancement, the Global Search within the Training tab was set to Traditional Search which uses SQL to return results. The SQL has a longer processing time for large data sets, and it is not as scalable as data grows over time.

With this enhancement, the default preference for Global Search (Training) is set to Enhanced Search rather than Traditional Search across all portals. Apart from using the Enhanced Search by default, the administrators can change the search engine preference to Traditional Search.

This functionality was released in Stage environments June 29. It may take up to seven days from June 29 for this change to take effect.



No user interface (UI) changes has been made and no configuration is required on the part of the administrator. The administrators can still access the Search Engine preferences so that they can switch back to Traditional Search (SQL) whenever necessary. To access this preference, go to [PREFERENCES > SEARCH PREFERENCES > TRAINING > SCROLL TO SEARCH ENGINE](#).



### How Does this Enhancement Benefit My Organization?

The Enhanced Search is a more effective, scalable, and result-driven way to power a search framework. Being the default framework for Global Search, it provides a consistent, unified experience for end users and allows for better and faster searches, especially in cases where large data sets are involved.

## Considerations

- With Enhanced Search enabled by default, the Title, Keywords, and Description filters are combined into one text field to enter search queries. To use the Title, Keywords, and Description filters independently, enable Traditional Search. The rest of the filters in Global Search (Training) remain unchanged and require no further action from the administrator to be able to use them.
- A newly created or updated Learning Object (LO) is updated within 15 minutes or less in the Enhanced Search results, but with few exceptions, which are as follows:
  - In case the LO is a part of a large data ingestion, or if a bulk update is completed, then the time for the update to be reflected in Enhanced Search results may depend on the amount or the size of the update.
  - In case the LO is created or updated at the same time a data set is updated, then the LO may take more than 15 minutes to be available in the Enhanced Search results.
- All filters operate using an 'AND' operation when Enhanced Search is enabled. This includes Custom Fields, which uses an 'OR' operation when Traditional Search is enabled.

## Frequently Asked Questions (FAQs)

### Will I be able to change the search framework if I want to?

Yes. Administrators can change the global search framework from Enhanced Search to Traditional Search if necessary. This can be done by using the search preference.

### How will I check if my portal has been updated?

The best way to confirm if your portal has been updated is to check the Search Preferences for your portal.

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

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

### How are search results determined?

Search results are weighted using a relevancy scoring system. For more information regarding Enhanced Search Scoring and Search Tokenization, please see [Learning Search vs. Traditional Search](#).

### We use Global Search (Training) to populate search results in other areas, including custom widgets. Will it be affected?

Yes. If you are using the results from Global Search (Training) to populate results from other pages of the application, the results may be updated to use Enhanced Search. If you are not sure what solution your portal uses, we recommend testing the updated results in stage portals or other lower environments.

## Implementation

This enhancement is automatically enabled for all organizations.

Upon release, it may take up to 7 days for the update to be present in stage portals and production portals.

**This functionality was released in Stage environments June 29. It may take up to seven days from June 29 for this change to take effect.**



## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Search - Training	Grants ability to search for training via Global Search. This permission also grants users the ability to view Subjects in Learner Home. If this permission is constrained to a specific OU, then that constraint is automatically applied within Global Search, including search filters and search results. This is an end user permission. The availability of this permission is controlled by a backend setting.	Learning
Global Search Preferences - Manage	Grants ability to configure Global Search Preferences. This is an administrator permission. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU and User's OU. By default, this permission is constrained to the organization.	Core Administration

# Learning Administration New UIs Auto Enabled and Legacy UIs Deprecated with the Q3 2024 Release

The new user interface (UI) learning administration pages will be automatically enabled in production, stage, and pilot portals with the Q3 2024 Release and the legacy user interface pages will no longer be available.

## What do I need to know?

Cornerstone has introduced a modernized look and feel for the most used learning administration pages. These user interface page changes are currently available for customers to review in the Pilot and Stage and can be self-activated in Production. At the start of User Acceptance testing (June 21) and in preparation for the July '23 Release, the new user interface updates for learning administration pages automatically enabled in all customer stage portals. We want to provide customers with time to test, update documentation, and prepare for the adoption of user interface changes.

## How can I prepare?

Create a test plan and review the following pages:

Page Name	Page Name
Certification Administration	Course Catalog Administration
Curricula Administration	Deep Link Administration
ILT Roster Pages	Instructor Led Training Manage Events and Sessions
Materials Administration	Test Engine Administration
Training Request Approvals	

If you are using Google Tag Manager, custom scripts, or code on these pages, please test your customizations with the new user interface enabled. If you have custom integrations such as BOTS on these pages, please test your integrations.

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 go to Customer Success Center and search for "Feedback Requested – UI Modifications and Enhancements" to share your feedback.

## Learning Assignment Tool - Relative Recurrence Enhancement (Early Adopter)

Prior to this enhancement, when the users did not meet the recurrence date criteria for dynamically recurring Learning Assignments the training assignments were not assigned to the users even if they met the assignment criteria later, thereby affecting overall compliance.

With this enhancement, if dynamically recurring Learning Assignments have the recurrence date set as "Relative" or "Annually", the Learning Assignment Tool (LAT) assigns the training to users who have surpassed the recurrence date criteria of dynamic assignments but still satisfy the training assignment criteria. The enhancement also enables Learning Assignments to search for all users who have missed the recurrence date of trainings in the past.

### Before

**Recurrence**

Enable Recurrence if you would like the training to occur for users more than once.

Enable Recurrence

When would you like the training to recur? ⓘ

Relative date

90 Day(s) from Date Completed

Recur only if the previous occurrence is complete ⓘ

Annually

**Before: User would have to be in the criteria on the 90th day.**

## After

**Recurrence**

Enable Recurrence if you would like the training to occur for users more than once.

Enable Recurrence

When would you like the training to recur? ⓘ

Relative date

Day(s) ▼ from  ▼

Recur only if the previous occurrence is complete ⓘ

Annually

**After: If the user re-enters the criteria after the 90th day, they will be considered and assigned.**

### How Does this Enhancement Benefit My Organization?

- Administrators can ensure that the users are compliant with the dynamically recurring Learning Assignments, thus reducing additional overhead to create another training assignment if a recurrence is missed.
- The users are later assigned the trainings even if they miss the training assignments because of surpassing the recurrence date criteria, thus maintaining overall compliance.

### Use Cases

Amy was inactive during the defined recurrence date (on the 90th day). Prior to this enhancement, Amy would be skipped by dynamically recurring Learning Assignments. But now, upon re-entering the training assignment criteria, she will be assigned as per the current dynamic recurrence settings.

### Considerations

- The enhancement is only applicable to Dynamic Recurring Learning Assignments with a daily processing frequency.

**Processing Frequency**

How frequently would you like the Assignment to process and assign training to users that newly meet the User Criteria?

Daily

Annually

- Inactive Dynamic Learning Assignments are out of scope, but later when the Learning Assignment becomes active, it will be considered for recurrence.
- Catching up with past users who missed Dynamic recurring Learning Assignments may take some time based on the initial load on the system. For example, if the initial user load is high, missed users will get the training assigned over the span of 2-3 days.
- Dynamic Learning Assignments with annual recurrence is within the scope of this enhancement. For example, a user who completed training five years ago and then enters the availability criteria of the Dynamic Learning Assignment with recurrence set to one year from the previous completion date, the user will be considered for historical catch-up.
- The recurrence is assigned to the users under the following scenarios:
  - If a learner is on leave during the assignment recurrence, they will be assigned the recurrence upon their return.
  - If a learner leaves a group associated with the assignment during the assignment recurrence, they will be assigned the recurrence if they return to the group associated with the assignment.
  - If the Cornerstone system is down during an assignment recurrence, the users will be assigned the recurrence next time when the assignment is scheduled to run.
- If the following scenario occurs, the user will be associated with the learning assignment but will not be assigned the recurrence:
  - A user has completed training that was assigned via Edge Import or Express Class, etc. The user is then assigned training with recurrence via the Learning Assignment Tool but the Recurrence Date is before the Learning Assignment Tool Association Date.

## Frequently Asked Questions (FAQs)

**What happens if the user gets training via Dynamic recurring Learning Assignment and then manually archives the training, or training is in the completed or removed tab before the next recurrence?**

If the user misses the recurrence and then later moves within the criteria, the training will be assigned to the user moving it back to the Active Tab. If the latest version is available, then the latest version will be assigned to the users.

**If for a Dynamic recurring Learning Assignment, Assign New Occurrence (ANO) is OFF and Maintain Progress (MP) is OFF, will the training recur?**

If the user misses the recurrence and then later moves within the criteria, the training will be assigned to the user, increasing the registration number by one due to recurrence.

**If for a Dynamic recurring Learning Assignment, Assign New Occurrence (ANO) is ON and Maintain Progress (MP) is ON, should the training recur?**

If the user misses the recurrence and then later moves within the criteria, the training will be assigned to the user, increasing the registration number by one due to recurrence.

**What happens when the Dynamic recurring Learning Assignment is deactivated accidentally and later activated?**

If the user misses the recurrence and then later moves within the criteria, the training will be assigned to the user once the Learning Assignment has been activated.

**What happens when there is a due date as part of a Dynamic recurring Learning Assignment for the training?**

If the user misses the recurrence and then later moves within the criteria, the training will be assigned, and the due date would be calculated based on the latest assignment, completion, or custom date based on the relative recurrence configuration on the Learning Assignment.

**What happens when the recurring training via Dynamic Learning Assignment is moved over to a new user record via Data Merge and the new user record is part of the criteria?**

If the new user misses the recurrence and then later moves within the criteria, the training will be assigned to the new user record proactively.

**Implementation**

This functionality is automatically enabled for all organizations in Stage portals.

This functionality is disabled by default in Production and Pilot portals. Customers can self-activate via Feature Activation Preferences in Production and Pilot portals as an Early Adopter feature. To access Feature Activation Preferences, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCE](#). In the Activate Recurrence Fix to include Greater than Consideration for Dynamic Recurring Learning Assignments section, click **ACTIVATE**.

It will be automatically in Production portals with the November 2023 Release.

**Permissions**

The following existing permissions apply to this functionality:

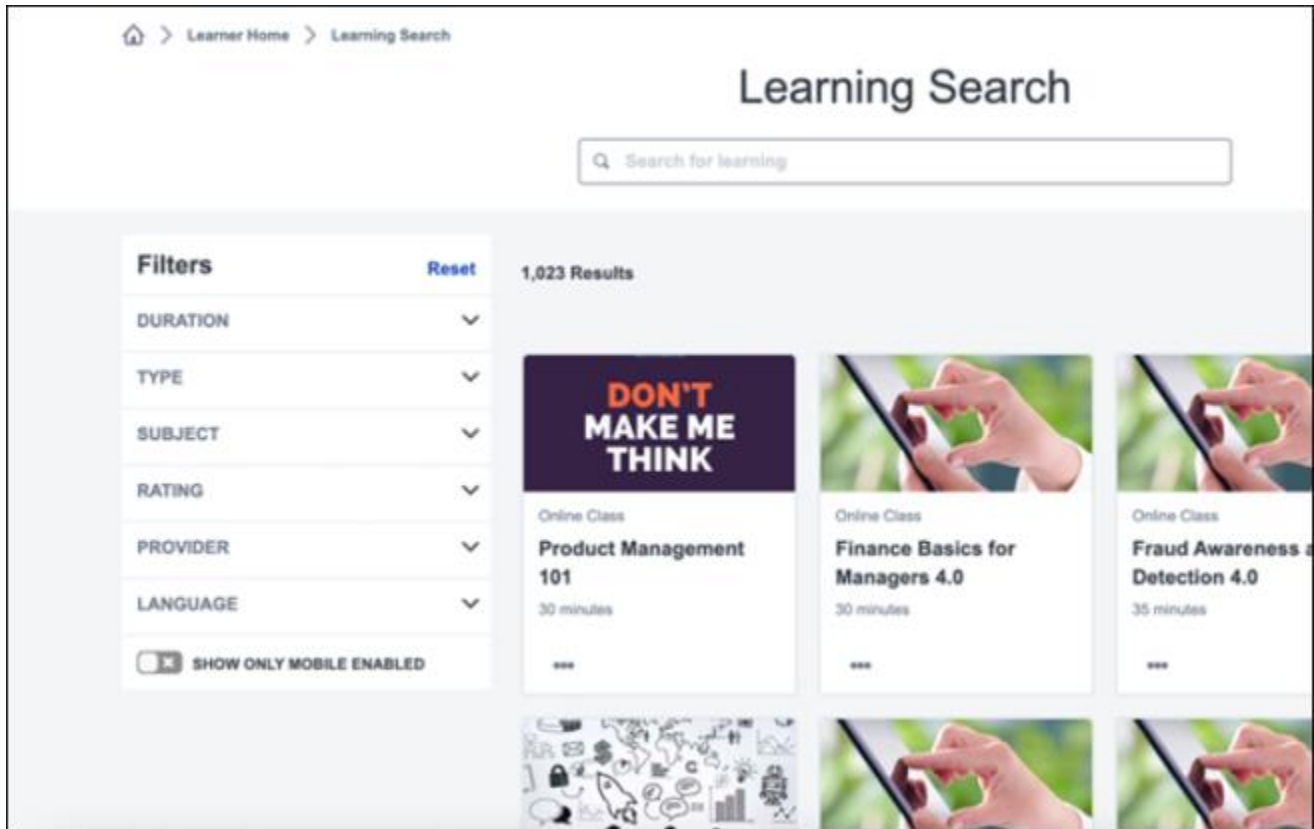
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Dynamic Reassignment	Grants ability to enable/disable Dynamic Re-assignment for an assignment after submission. When Dynamic Re-assignment is enabled, users that meet the User Criteria again (after previously being dynamically removed) are re-assigned. This permission is dependent on the Assignment - Standard, Dynamic - Standard and Dynamic, and Dynamic Assignment - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
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

## Learning Search - Filter Configuration (Early Adopter)

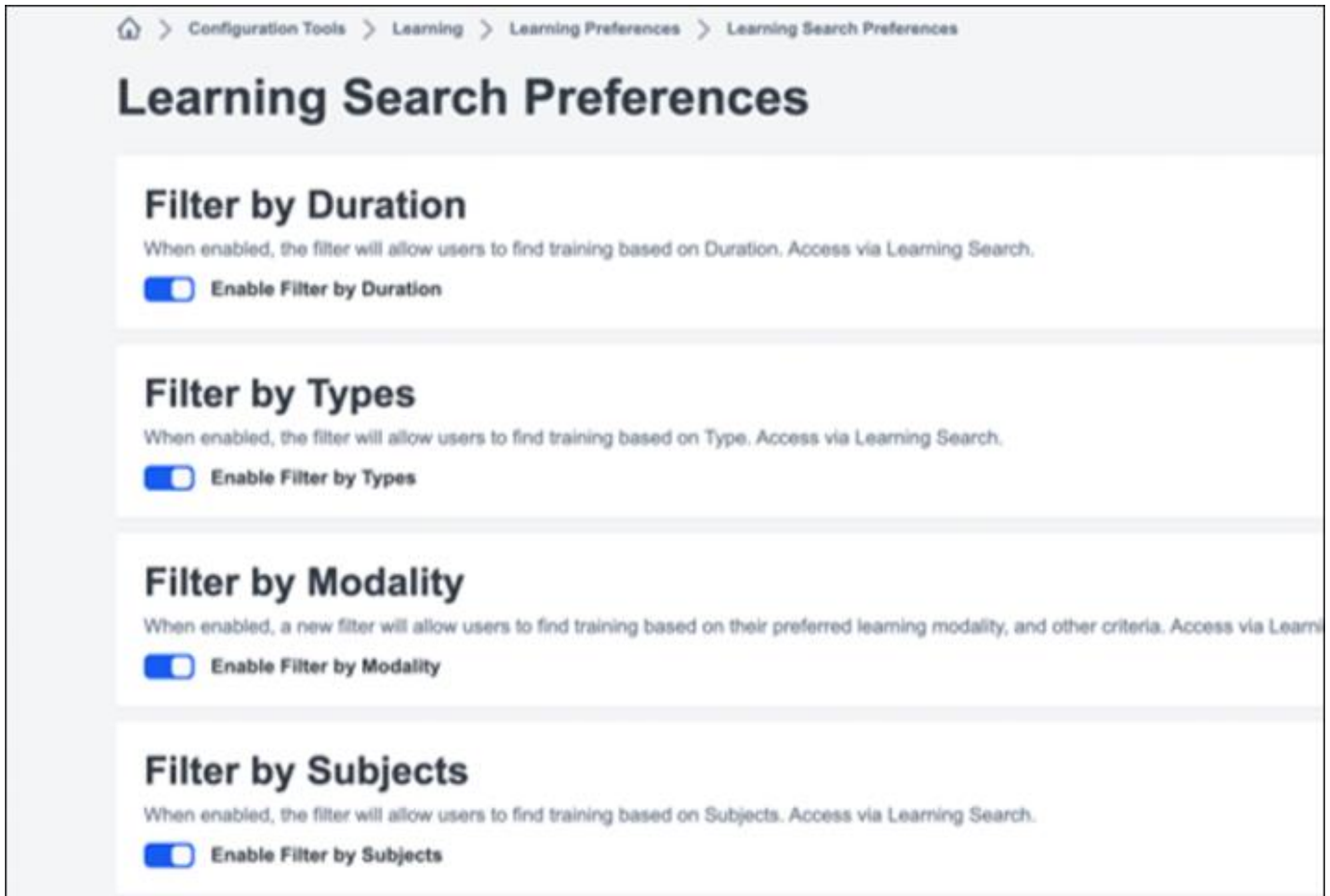
Prior to this enhancement, the administrators did not have the option to disable various filters in the Learning Search page. As a result, the users were able to view filters which were rarely used in their portals.

With this enhancement, administrators can enable the filters which are used in their portals or divisions and disable those filters which are rarely used.

To access Learning Search, go to [LEARNING > LEARNER HOME](#).



The administrators can now configure the Learning Search filters by visiting Learning Search Preferences. To access Learning Search Preferences, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > LEARNING SEARCH PREFERENCES](#).



### How Does this Enhancement Benefit My Organization?

The ability to enable or disable filters gives the administrators greater customization capabilities in Learning Search page.

### Considerations

- All filters, except Skills (Capabilities), continue to be enabled by default. If the portal has already disabled Modality, the system will continue to respect that configuration.
- Customers cannot disable all filters at the same time. At least one filter must be enabled.

### Frequently Asked Questions (FAQs)

#### What filters are now able to be configured or changed?

Before this release, only the Modality filter had the ability to be enabled or disabled based on the administrators wishes. After this release, the following filters can be enabled or disabled: Duration, Types, Subjects, Rating, Provider, Language, Mobile Enabled, and Skills (Capabilities).

#### What happens to any links to filtered searches if that filter becomes disabled?

When a filter is disabled, any link to the search page with that filter already applied will no longer display the filter and the filter will not be applied.



## Implementation

This enhancement is automatically enabled for all organizations.

## Permissions

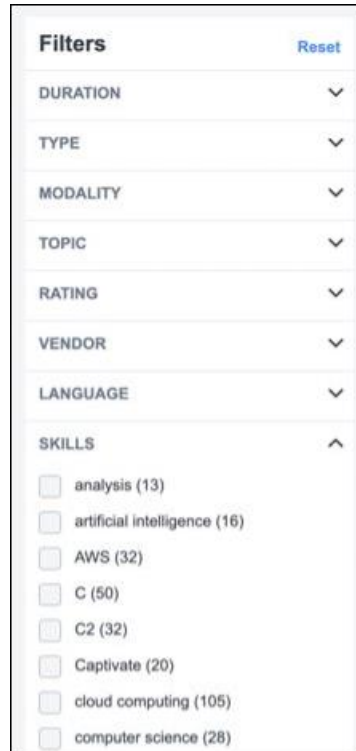
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home Preferences	Grants access to the Learner Home Preferences, where the administrator can configure the arrangement of content on Learner Home, as well as other settings. This permission also grants access to the Learning Search Preferences page, where the administrator can configure Learning Search options. This permission can be constrained by organizational unit (OU) and User's OU. This is an administrator permission.	Learning - Administration
Events Calendar	Grants access to view Events Calendar page. This permission also makes the Event Calendar button on the Learning Search page visible. This is an end user permission.	Learning
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning

## Learning Search – Skills (Capabilities) Filter (Early Adopter)

Prior to this enhancement, the customers with Skills (Capabilities) enabled in their portals were unable to find content for learners based on Skills (Capabilities) related to their trainings.

With this enhancement, the customers who have enabled content tagging or manually updated trainings with Skills (Capabilities) can filter Learning Search results with those skills. The Skills (Capabilities) filter allows learners to find trainings for the Skills (Capabilities) upon which they want to improve.



The Skills (Capabilities) filter can be enabled or disabled anytime for any division in the Learning Search Preferences page. To go to Learning Search Preferences, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > LEARNING SEARCH PREFERENCES](#).

Like other filters available in Learning Search, the Skills (Capabilities) Filter is available on Learning Search page when the following criteria are met:

- The Skills Filter is enabled via Learning Search Preferences.
- The trainings in the portal are tagged with Skills (Capabilities).
- The search results have Skills (Capabilities) associated to them.

### How Does this Enhancement Benefit My Organization?

The new Skills (Capabilities) search filter helps users find relevant content for their training.

### Frequently Asked Questions (FAQs)

[I enabled the Skills \(Capabilities\) Filter through Learning Search Preferences, but I do not see the filter on Learning Search. Why?](#)

There are two reasons why the Skills (Capabilities) filter does not show on Learning Search. Either no content is available to that user that has been tagged with Skills (Capabilities) or no content in the search results has Skills (Capabilities) tagged to it.

### What is Content Skills Tagging?

Skills tagging refers to the process of adding Skills to content in the catalog. Skills tagging can be done either through automated Skills tagging or through Edge Import. For more information, please see [Training Capabilities - Content Skills Tagging](#) and [Capabilities Preferences - Content Skills Tagging](#) in Online Help.

### My portal has thousands of Skills, but I only see a small amount in the filter. Is that expected?

Yes. The filter will show up to 50 Skills (Capabilities) at any time. Like other filtered results in the Learning Search page, these results are sorted alphabetically.

### Implementation

This enhancement is available for all organizations. The Skills filter is off by default and must be enabled through Learning Search Preferences.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home Preferences	Grants access to the Learner Home Preferences, where the administrator can configure the arrangement of content on Learner Home, as well as other settings. This permission also grants access to the Learning Search Preferences page, where the administrator can configure Learning Search options. This permission can be constrained by organizational unit (OU) and User's OU. This is an administrator permission.	Learning - Administration
Learner Home	Grants access to the Learner Home and the Learning Search page. This is an end user permission. This permission cannot be constrained.	Learning

## Reporting Fields - Learning

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

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY	SECTION (UI GROUP)
Session Cancellation Reason (training)	This field displays the reason the administrator selected in the drop-down when canceling the session.	Text	Learning	Training	Training Details
Session Cancellation Comment (training)	This field displays the comment entered by the administrator when canceling the session	Text	Learning	Training	Training Details

The following fields already exist in Reporting 2.0 but are associated to the user's transcript. As such, the field names are updated to remove ambiguity:

PREVIOUS FIELD NAME	UPDATED FIELD NAME
Cancellation Reason	Cancellation Reason (transcript)
Cancellation Reason Comment	Cancellation Reason Comment (transcript)

### 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.

**User Interface Modifications for Learning Administration Pages (Early Adopter)**

## User Interface Modifications for Learning Administration Pages (Early Adopter)

This collection of enhancements for the July '23 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 will not always work for everyone. To that end, we are releasing our new UI enhancements in Early Adopter mode so that you can make sure they are right for your team by taking a test drive in stage before implementing them in production. You can introduce these new features in production via Learning Feature Activation Preferences. If you want to turn off these features and revert back to your prior experience in production or stage, you can disable them.

With this enhancement, the following previously delivered user interfaces (UI) are upgraded:

- ILT Events and Session Administration
- ILT Roster
- Materials Administration
- Course Catalog Administration
- Curricula Administration
- Deep Link Administration
- Training Request Approval

The enhancement also introduces new pages for the following system areas:

- Certification Administration
- Test Engine Administration

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

Many of the frequently used learning administration pages use outdated design principles where administrators may be unclear about the actions. Therefore, we have introduced a new user interface design for the frequently used learning administration pages to improve the look and feel and make the actions on these pages clearer. All the updates were done based on customer feedback. The key features of the new UI are:

- Reduced scrolling
- Optimize the use of white space
- Clear actions
- Placement of field descriptions and field values

### Considerations

We have incorporated changes to our designs based on customer feedback. The areas for which we received consistent feedback were table grids, zooming, and wrapping. For the July 2023 release, we have incorporated some changes to the Curricula Administration pages that allow a horizontal scrolling bar to appear with lower resolutions and zooming. Please review the changes to the Curricula Administration page and share your feedback. We have not implemented this for all the new and updated pages and we would like your feedback on this as implemented in the Curricula Administration pages.

### Example of Curricula Administration with Horizontal Scrolling in higher resolution

Catalog Management

## Curricula Administration

Q complian Training Title English (US) Include Inactive Search

Manage Curricula View Pending Requests Create A New Curriculum

Title	Description	Version	Language	Effective Date	Created By	Owners	Status	
Annual Compliance		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Tatu, Debbie	✓	Edit
Annual Compliance		32.0	English (US)	3/15/2023	mantri, aishwarya	Tatu, Debbie	✓	Edit
Annual Compliance		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Tatu, Debbie	✓	Edit
Annual Compliance		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Tatu, Debbie	✓	Edit
Compliance A Curriculum		29.0	English (US)	3/15/2023	mantri, aishwarya	Smith, Sam	✓	Edit
Compliance A Curriculum		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Smith, Sam	✓	Edit
Compliance A Curriculum		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Smith, Sam	✓	Edit
Compliance A Curriculum		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Smith, Sam	✓	Edit

Showing 1-8 of 8 Back

### Example of Curricula Administration with Horizontal Scrolling in lower resolution

Q complian Training Title English (US) Include Inactive Search

Manage Curricula View Pending Requests Create A New Curriculum

Title	Description	Version	Language	Effective Date	Created By	Owners	Status	
Annual Compliance		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Tatu, Debbie	✓	Edit
Annual Compliance		32.0	English (US)	3/15/2023	mantri, aishwarya	Tatu, Debbie	✓	Edit
Annual Compliance		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Tatu, Debbie	✓	Edit
Annual Compliance		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Tatu, Debbie	✓	Edit
Compliance A Curriculum		29.0	English (US)	3/15/2023	mantri, aishwarya	Smith, Sam	✓	Edit
Compliance A Curriculum		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Smith, Sam	✓	Edit
Compliance A Curriculum		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Smith, Sam	✓	Edit
Compliance A Curriculum		1.0	English (US)	3/14/2023	Siddamshetty, Rahul	Smith, Sam	✓	Edit

Showing 1-8 of 8 Back

### Frequently Asked Questions (FAQs)

#### Can I disable or enable individual pages?

The original pages are still behind a single feature preference setting but based on customer feedback, all new pages have their own feature preference. Course Catalog Administration, Deep Link Administration, Materials Administration, Curricula Administration, Training Request Approval, and ILT Events and Session Administration remain behind a single feature activation preference which allows administrators to enable or disable all these pages at the same time. For example, you cannot disable Course Catalog Administration but enable Curricula Administration. You can enable or disable Certification Administration, Test Engine Administration, or ILT Roster separately as these pages have their own feature activation preference.

#### Can we enable or disable feature preferences at any time?

Yes, until the deprecation in Q3 2024, the feature preferences can be enabled or disabled at any time. When a preference is changed, a user must log out and log in to apply the change.

### How does customization and branding work with the page modifications?

Any customer with a custom theme and logo set in Display Preference should expect their portal to work normally. Customers who use custom code, branding, or Google Tag Manager should test the new pages as customization may require an update.

### What do I have to do if my custom integrations or custom code does not work on the new pages?

If you worked with a partner for these customizations, please reach out to your partner for additional support. If it was Cornerstone that worked as a partner on your customizations, please reach out to your Account Manager or Customer Success Manager for additional support and provide details about the pages impacted, the old UI behavior, and the new UI behavior. The customizations in question are specific to the following pages with new UI:

- Training Request Approval
- Curricula Administration
- Materials Administration
- Certification Administration
- Test Engine Administration
- Course Catalog Administration
- Deep Link Administration
- ILT Events and Session Administration
- ILT Roster

### Will custom integrations work with the new pages?

The page URLs and the controls have been updated for these new pages. Please test any custom integrations that are related to these pages. Customers who have BOTs or any other integration specific to these pages may need to update the integrations.

### I noticed that some pages link to legacy pages or legacy pop-ups and modals. Is this expected?

Yes, our initial focus was on the most heavily used learning administration pages. There may be some legacy pages, pop-ups, and modals that directs to the old pages and these will be considered for the future.

### Did you make any changes to address accessibility?

No, we did not add any new accessibility updates, but we have a team focused on accessibility who is reviewing and making changes to update accessibility. There are several accessibility updates that you will see across learning pages with the July release.

### How can I provide feedback on the new and updated pages?

Feedback can be provided In the Customer Success Center by searching “Feedback Requested - UI Modifications and Enhancements”. We will continue to review the feedback.

## Implementation

All pages are automatically enabled in stage portals on June 21. Activation is required in production portals for all organizations using the Learning module. Customers who have activated the previously released pages in production will continue to see these pages with new changes applied.



**Note:** The UI modifications for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration were previously released with November '22 release. Similarly, the ILT Roster UI modification was previously released with March '23 release. Customers who had already enabled the above-mentioned UI modifications in November and March via feature activation will see the UI modifications of July '23 in production automatically. Customers who never enabled the UI modifications from November '22 and March '23 releases will continue to see the old legacy user interface. Customers can also revert back to legacy UI by deactivating feature preferences.

## Permissions

The following existing permissions apply 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 Activation

All UI preferences are enabled automatically in Stage environments on June 21. All UI preferences can be enabled in Production environments by customers through Feature Activation. The following pages are enabled with a single preference:

- ILT Events and Session Administration
- Materials Administration
- Course Catalog Administration
- Curricula Administration
- Deep Link Administration
- Training Request Approval

ILT Roster (March '23), Test Engine Administration, and Certification Administration are enabled with individual preferences.

To activate the UI modifications through Feature Activation, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications section, click **ACTIVATE**.

 This action can be undone.

### 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.

[Activate](#)

If necessary, the preference can be deactivated to revert back to legacy user interface. However, the user must log out, then log in for the change to take effect.

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

### Test Administration User Interface Modifications

Activation will update the user interface for Test Administration. Deactivation will use the Legacy User Interface.

[Deactivate](#)

**Note:** The UI modifications for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration were previously released with November '22 release. Similarly, the ILT Roster UI modification was previously released with March '23 release. Customers who had already enabled the above-mentioned UI modifications in November and March via feature activation will see the UI modifications of July '23 in production automatically. Customers who never enabled the UI modifications from November '22 and March '23 releases will continue to see the old legacy user interface. Customers can also revert back to legacy UI by deactivating feature preferences.

## New UI - Certification Administration

With this enhancement, the Certification Administration is upgraded with new pages. With these interface changes, no functionality changes are included.

To activate the new Certification Administration UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the Certification Administration User Interface Modifications section, click **ACTIVATE**. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- Certification Administration list page
- View from the Certification Administration list page
- Certification Administration for creating or editing a certification and all related pages
- Manage Families and Categories
- Update certificate for all certifications
- Proxy create pages
- Certification Management main page
- Certification Management - View
- Actions from Certification Management - View Users Page:
  - Revoke
  - Progress Report
  - Place on Hold
  - Edit Due Date
  - Edit Expiration Date
  - View Details
  - Print
  - Adding external training

To access the Certification Administration, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CERTIFICATIONS](#).

# Before

**Edit Certification**

- General
- Framework
- Scheduling
- Emails
- Confirm

**General**

Certification ID: 183  
Title: Fire Safety 2022  
Course Code: Learning 6485-3 01  
Description:   
  
**Design** HTML

Family: Engineering Family  
Category: CAT 01 Public Safety Category  
Available Language: English (US)  
Default Language: English (US) This is the language in which the certification is shown to the user if this certification's information is not localized in their language  
Version: 3.0  
Owners:   
Tatu, Debbie (statu)  
Debbie\_Admin, Ravi (mg\_admin)  
Training Contact: Debbie Tatu, dtatu@csod.com  
Active:

---

**DETAILS**

Last training item completion date Use this date for initial certification date if all requirements are completed prior to certification registration

Allow adjustment of credits awarded to in progress users.

Approval required for enrollment in certification.

Allow users to add external training.

Delegate approval process of external training to user's manager.

Override LO Availability

Only the current registration number for any training item will be credited for any given period

Allow users to print certificate upon completion.

Allow users to request exemption from prerequisite.

Allow training items to incur ignoring the recurrence setting on training level

Users are required to complete the minimum credits for all child sections in order for credits to be counted towards the parent section

Change tracking unit from credit to

Display a warning for Certification Owners before they approve this certification for completion

Display a warning for Certification Owners before they deny this certification for completion

---

**PREREQUISITES**

---

**AVAILABILITY**

Select OLI Criteria

## After

Home > Catalog > Catalog Management > Certification Administration

### Edit Certification

General

Framework

Scheduling

Emails

Confirm

**Certification ID** 189

**Title** Fire Safety 2022

**Course Code** Learning-9465-3.0

**Description**

Design HTML

**Family** Engineering Family

**Category** CAT-01: Public Safety Category

**Available Languages** English (US)

**Default Language** English (US)  
This is the language in which the certification is shown to the user if this certification's information is not localized in their language

**Version** 3.0

**Owners** Select additional owners

Tatu, Debbie (dtatu) x

Gehlot\_Admin, Ravi (rvg\_admin) x

**Training Contact** Debbie Tatu dtatu@csod.com

**Active**

**Details**

**Date** Last training item completion date  
Use this date for initial certification date if all requirements are completed prior to certification registration

Allow adjustment of credits awarded to in progress users.

Approval required for enrollment in certification.

**Note:** The Certification Management page is in scope only when accessed from the Certification Management page. Clicking Manage from a user's transcript for certification will still display the old Certification Management page.

## Considerations

The following Certification Administration pages are newly designed certification pages and cannot be enabled or disabled using the Certification Administration feature activation preference. These pages will only have the new UI:

- Certification Bulk Removal pages
- Certification Proxy Enrollment main page
- View link from Certification Proxy Enrollment page
- View details from the Proxy Enrollment details page
- View link for the Selection Criteria on the Proxy Enrollment details page
- Certification Proxy Enrollment View Details page
- Manage Pending Requests page
- Manage Past requests page

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Categories Admin	Grants administrators ability to manage certification categories. This is an administrator permission.	Learning - Administration
Certification - Custom Certificate Update	This permission grants access to the <b>Update Certificate for All Certifications</b> link on the Certification Administration page. The <b>Update Certificate for All Certifications</b> link allows administrators to upload and modify a certificate template for all the certifications in the system at once. This is an administrator permission. This permission cannot be constrained.	Learning - Administration
Certification - Family Admin	Grants administrators ability to manage certification families. This is an administrator permission.	Learning - Administration
Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration
Certification - Owner	Grants user ability to act as the certification owner, which enables them to view and approve requests for the certification, manage users in the certification, and edit the due date/expiration date for users in the certification. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

## New UI - Course Catalog Administration

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

To activate the new Course Catalog Administration UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications section, click **ACTIVATE**.

Activation will update the user interface for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- Course catalog main search page
- Course catalog refine search
- Course catalog individual items:
  - General Page
    - Post-Work
    - Pre-Work
  - Emails - Custom Emails
  - Prerequisites
  - Approval Workflow
  - Training Units
  - Training Exemptions
- Course catalog individual items and batch edit items:
  - Signatures
  - Skills
  - Competencies
  - Confirmation
  - Evaluations
  - Availability
  - Points
  - Badges
  - Course Recommendations
  - Pricing
  - Commerce
  - Thumbnail Image
  - Mobile
  - Modality
  - Active
  - System default and No Emails

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 Learning Admin Console.

## Before


**Edit Training**

**Original Title:** Information Security 4.0  
**Title:** Information Security 4.0

**Provider:** Wecomply  
**Type:** Online Class  
**Version:** 4.0  
**Learning Object Id:** b789940-7886-4a65-bba2-00342457c2bf

**Keywords:** identity theft, security

**Description:** This 30-minute course explains the basic principles of information security in simple, understandable terms. It includes pop-quizzes, news clips and a final quiz highlighting real-world compliance issues that employees should learn to recognize and respond to appropriately. The topics covered in the program include: (1) Information security overview; (2) Electronic IDs and passwords; (3) Avoiding identity theft; (4) Information classification; (5) Information Security.jpg

**Thumbnail Image:**  


**Subscriptions:** N/A  
**Content Source:** N/A  
**Resources:** Add Attachment

No attachments have been uploaded for this Online Class

**Available Languages:** English (US)  
**Default Language:** English (US) : This is the language shown to the user if the course is not localized in their language.  
**Points:** 1.00  
**Badge:** Add Badge  
**Credits:** 0  
**Max Score:** 0 If this value is set to 0 then no score will be displayed on the user's transcript. This field shows the points possible for the course.

## After

**General** Prerequisites Subjects Skills Competencies Acknowledgement Approval Workflow Availability Emails Recommendations Pricing Training Units Transactions

**Course Title:** Machine Learning for Marketing: Essential Training


**Keywords:**

**Description:** Artificial intelligence and machine learning are changing the world. Computers can "learn" from data without being programmed and make automated, intelligent decisions. The technology is accessible to businesses large and small, and is making a major impact on the way companies conduct marketing. With machine learning, marketers can automate many tasks within the customer journey, including customer segmentation, personalization, and even pricing. This course helps those in technical, creative, and leadership roles understand how machine learning

**Subscriptions:** N/A  
**Content Source:** N/A  
**Resources:** Add Attachment

No attachments have been uploaded for this Online Class

**Available Languages:** English (US)  
**Default Language:** English (US) This is the language shown to the user if the course is not localized in their language.  
**Points:** 0  
**Badge:** Add Badge  
**Credits:** 0

**Thumbnail Image:**  
  
<https://cdn.lynda.com/c/...> Remove

**Original Title:** Machine Learning for Marketing: Essential Training  
**Provider:** LinkedIn Learning Remove  
**Type:** Online Class  
**Version:** 1.0  
**Learning Object Id:** 13696a5b-cfa1-53fa-8e99-b4a6091bb078

## Considerations

- Clicking a course title opens the Course Console which is not included in the Course Catalog Administration UI modifications.
- The Assign option when selecting a single course is not included in the Course Catalog Administration UI modifications.
- The View as user option when selecting a single course is not included in the Course Catalog Administration UI modifications.



## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Manage Screen Resolution	Grants ability to manage screen resolution for courses at the learning object level, via the course catalog. This permission works in conjunction with the Course Catalog - Update permission. This is an administrator permission.	Learning - Administration
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> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration
Training Providers - Manage	Grants ability to view all Training Providers (Vendors) and mark them active or inactive as needed. This is an administrator permission.	Learning - Administration

## New UI - Curricula Administration

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

To activate the new Curricula Administration UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications section, click **ACTIVATE**.

Activation will update the user interface for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- Curricula Administration main page
  - Edit Evaluation option
  - View Users option
  - Modify Version of Selected Users
- View Pending Requests
- Create a new curriculum, Edit curriculum pages and the options on these pages
- Copy an existing curriculum page
- Delete a curriculum page

To access Curricula Administration, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CURRICULA](#).

### Before

The screenshot displays the 'General' configuration page for a curriculum. The page has a sidebar on the left with navigation options: General, Availability, Emails, Pricing, Training Units, and Structure. The main content area includes the following fields and options:

- Title:** Annual In-Service Training for Fire Personnel
- Keywords:** (empty)
- Description:** Satisfies completion of annual training requirements as mandated by the Professional Standards Commission.
- Available Languages:** English (US)
- Default Language:** English (US)
- Vendor:** Fire Services
- Owners:** Admn, PS (with an 'Add Owner' button)
- Subjects:** Competencies > Achieving Results, Fire Services (with an 'Add Subject' button)
- Target Audience:** (empty)
- CE Credits:** (empty)
- DEI Credits:** (empty)
- Curriculum Player:**
- Hide Overall and Section Progress:**
- Required Training Approvals:** 0 (with a note: "Place a value in this box greater than 0 to require this number of training approvals to all users who request this training. If this box is blank, the system will look at the user record for the required number of training approvals. NOTE: Changes to this field will only apply to users who do not have this Cohort on their transcript.")
- Required Completion Approvals:** 0 (with a note: "Place a value in this box greater than 0 to require this number of training completion approvals to all users who complete this training. Upon completion user's status will proceed to Pending Completion Approval before moving to Completed. If this box is blank, the LO will not require completion approval. NOTE: Changes to this field will only apply to users who have not completed this Cohort.")

**PREREQUISITES**

Users must complete one of the prerequisite options before registering for this training.

NAME	TYPE	OPTIONS
------	------	---------

## After

The screenshot displays the 'General' configuration page for a curriculum item. The left sidebar lists navigation options: General, Availability, Emails, Pricing, Training Units, and Structure. The main content area includes the following fields:

- Effective Date:** 2/13/2023
- Title:** 3-22 curriculum v5
- Keywords:** Enter Keywords
- Description:** A rich text editor with a toolbar (bold, italic, underline, link, unlink, list, list-group, undo, redo) and a 'Design' button.
- Available Languages:** English (US)
- Default Language:** English (US)
- Vendor:** Ineha test
- Owners:** + Add Owner, Mendoza, Julianne x
- soumyaDF01:** MM/DD/YYYY
- mac-scrollbar:** (empty text box)

## Permissions

The following existing permissions apply to this functionality:

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>	Learning - Administration

	<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>	
Curriculum Owner	<p>Grants ability for those designated as owner of one or more existing curricula to make edits/updates to those curricula. This is an administrator permission.</p>	Learning - Administration
Curriculum Player Options	<p>Grants ability to enable Curriculum Player feature via the General step when creating or editing a curriculum. This permission cannot be constrained. This is an administrator permission.</p>	Learning - Administration
Enable Curricula Auto-Launch Option	<p>Grants ability to enable the curricula auto-launch feature via the Structure step when creating or editing a curriculum. This is an administrator permission.</p>	Learning - Administration

## New UI - Deep Link Administration

With this enhancement, the Deep Link Administration pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

To activate the new Deep Link Administration UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications section, click **ACTIVATE**.

Activation will update the user interface for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- Deep Link - Base URL page
- Deep Link - Page URL page and associated modals and pop-ups
- Deep Link Generator Page and associated modals and pop-ups

To access the Deep Link Administration, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > DEEP LINKS](#).

### Before

Base URL	Page URL	Subject	Image	Alternate Text	Link Expiration Date
Default	Default	-a href="https://QA02.ccod.com/DeepLinkProcessRedirect.aspx?module=browsetraining">https://QA02.ccod.com/DeepLinkProcessRedirect.aspx?module=browsetraining-ca			
Internal	SSO	-a href="http://qa02.ccod.com/DeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">http://qa02.ccod.com/DeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Scout	SSO	-a href="https://qa02.ccod.com/deepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/deepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
test	SSO	-a href="https://google.com/%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://google.com/%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
TestBasePage	SSO	-a href="https://feedbase.com/%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://feedbase.com/%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
Deep Link	SSO	-a href="https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https://qa02.ccod.com/DeepLinkNewUI/ismodulelinks.aspx%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining-ca			
ve 8/22/14	SelfReg	-a href="https://QA02.ccod.com/default.aspx?mq02-inspact&c=%5e%5e%5e&FQR0DgXOP0o3M6E0Q%3F%3d&link=%2FDeepLink%2FProcessRedirect.aspx%3Fmodule%3Dbrowsetraining">https://QA02.ccod.com/default.aspx?mq02-			

# After

Base URL
Page URL
Deep Link Generator

Page URL
Subject
Image
Alternate Text
Link Expiration Date

Browse for Training 
Add Subject 
No Image 
Insert Text 

MM/DD/YYYY 
Generate Links

Base URL	Base URL Type	Deep Link
Default	Default	<a href="https://qa02.csod.com/DeepLink/ProcessRedirect.aspx?module=browsetraining">https://qa02.csod.com/DeepLink/ProcessRedirect.aspx?module=browsetraining</a>
Deep Link	SSO	<a href="https%2FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining</a>
Deep Link	SSO	<a href="https:\\%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https:\\%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining</a>
LO Approvals	SSO	<a href="https%2FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining</a>
Deep Link	SSO	<a href="https%2FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">https%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining</a>
test	SSO	<a href="test link%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining">test link%252FDeepLink%252FProcessRedirect.aspx%253Fmodule%253Dbrowsetraining</a>
Reg. Group	SelfReg	<a href="https://qa02.csod.com/default.aspx?p=qa02-qaconnect&c=RG&dlink=%2FDeepLink%2FProcessRedirect.aspx%3Fmodule%3Dbrowsetraining">https://qa02.csod.com/default.aspx?p=qa02-qaconnect&c=RG&dlink=%2FDeepLink%2FProcessRedirect.aspx%3Fmodule%3Dbrowsetraining</a>
test	SelfReg	<a href="https://qa02.csod.com/default.aspx?p=qa02-qaconnect&c=test&dlink=%2FDeepLink%2FProcessRedirect.aspx%3Fmodule%3Dbrowsetraining">https://qa02.csod.com/default.aspx?p=qa02-qaconnect&c=test&dlink=%2FDeepLink%2FProcessRedirect.aspx%3Fmodule%3Dbrowsetraining</a>

## Permissions

The following existing permissions apply to this functionality:

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

## New UI - ILT Events and Session Administration

With this enhancement, the ILT - Manage Events and Sessions pages are upgraded with a new user interface. With these interface changes, no functionality changes are included.

To activate the new ILT – Manage Events and Session Administration UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications section, click **ACTIVATE**.

Activation will update the user interface for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- ILT - View Session pages
- Cancel Session pages
- Schedule Wizard pages
- Parts Schedule pages
- Events Calendar from within session selection
- Details - including QR Code, Request form, Training Contact, Upload attachment, Cost, Penalty, Pre-Work, Course Code, Prerequisites
- Emails and Custom Emails
- Pricing
- Training Units
- Interest Tracking
- vILT session options (Webex)

To access ILT – Events and Session Administration, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > EVENTS AND SESSIONS](#).

## Before

The screenshot shows the 'Edit Part' form for a session titled 'Differentiating Instructions for All Students'. The form is divided into several sections:

- Session:** A sidebar menu on the left with options: Parts Schedule (selected), Details, Availability, Emails, Pricing, Training Units, and Summary.
- Edit Part:** The main form area with the following fields:
  - Name:** 1
  - Description:** (empty)
  - Subject:** Add Subject
  - Location:** Chicago Public Schools-Chief Educat
  - Buttons:** Select Room Layout, Add Resource, Add Instructor
  - DATE AND TIME:**
    - Start Date:** 12/11/2019
    - End:** 12/11/2019
    - Start Time:** 9:30 AM
    - End:** 5:30 PM
    - Time Zone:** (UTC-06:00) Central Time (US & Canada)
    - Display Times in Time Zone of User
    - Part Duration:** 9 Hour(s) 0 Minute(s)
  - PART BREAK:**
    - Part Duration - Break(s) = Training Hours
    - Training Hours: 9 Hour(s) 0 Minute(s)
  - PART OCCURRENCE:**
    - Occurs:** Once (selected), Daily, Weekly, Monthly
    - Duration:** (empty)
    - Start Date:** 12/11/2019
  - Buttons:** Save Part, Save & Add New Part, Cancel

## After

Parts Schedule

Details

Availability

Emails

Pricing

Training Units

Summary

### Parts Schedule

#### Edit Part

---

**Name**

**Description**

**Subject** [+ Add Subject](#)

**Location**

**Select Room Layout** [Select](#)

**Add Resource** [Add](#)

**Add Instructor** [Add](#)

---

#### Date and Time

**Start Date**  **End**

**Start Time**  **End**

**Time Zone**   Display Times in Time Zone of User

**Part Duration** 9 Hour(s) 0 Minute(s)

---

#### Part Break

[Add Break](#)

Part Duration - Break(s) = Training Hours

**Training Hours:** 9 Hour(s) 0 Minute(s)

---

#### Part Occurrence

**Occurs**

Once

Daily

Weekly

Monthly

**Duration**

**Start Date**

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration



	<b>Note:</b> The "Restrict to User as Instructor" constraint is available, but it does not actually constrain the permission.	
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission.  Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.	Learning - Administration

## New UI - ILT Roster

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

To activate the new ILT – Roster UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications – ILT Roster pages section, click **ACTIVATE**. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- ILT Roster pages
  - Parent Roster
  - Attendance and Scoring
  - Exception Requests
- Exception Request pages
  - Current
  - Past Requests
- Waitlist pages
  - Current by User
  - Current by Session
  - Past Requests

To access the ILT Roster , go to [ILT > MANAGE EVENTS AND SESSIONS](#).

## Before

Differentiating Instructions for All Students Roster

**Session Roster**

Parent Roster | Attendance and Scoring

738 | Inventory Unassigned (0) | Pending Payment (0)

Session Status: Completed  
Session Start Date: 11/7/2013 12:00:00 PM  
Session End Date: 11/7/2013 6:00:00 PM  
Seats Available: 739

Attachments:  No file chosen

**RESOURCES**

Add Attachment

No attachments have been uploaded for this Session

**SCHEDULE**

**USERS**

No file chosen

Show Withdrawn/Removed Users (1 Result)

Name	User ID	Locator	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
Miller, John	jml1er	738	K12 School Administration (Division)	jml1azafes@gmail.com	1 of 1 Parts Attended		Pass	Completed	

**Comments**

## After

**Session Roster**
[View New Roster Pages](#)

Parent Roster
Attendance and Scoring

---

Inventory Unassigned (0)
Pending Payment (0)
Exception Requests (0)
Waitlisted (0)
[Printable Version](#)
[Export to Excel](#)

Session Status	Session Start Date	Session End Date	Seats Available
Approved	12/9/2021 11:00:00 PM	12/9/2021 11:30:00 PM	4/5

**Attachments**

No file chosen

**Resources**

No attachments have been uploaded for this Session

**Schedule**

**Users**

No User Selected

**Roster**  Show Withdrawn/Removed Users

[Download 'Bulk Add Users' template](#)

No file chosen

Name	User ID	Locator	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
Employee, Callie	caemployee	5154	DIV-A (Division) All users (Group) all users2 (Group) Compliance B (Group) loadtest2712 (Group) Lead Series (Group)		0 of 1 Parts Attended			Registered	...

(1 Result)

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Attachments in Transcript - Manage	Grants ability to upload new attachments and delete existing attachments for LOs on a user's transcript. Users with this permission are automatically granted permission to view attachments. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's self, User's ILT Provider, ILT Provider, and Instructor.	Learning Administration
Attachments in Transcript - View	Grants ability to view attachments that have been uploaded for LOs on a user's transcript. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's self, User's ILT Provider, ILT Provider, and Instructor.	Learning

Exceptions - Manage	Grants ability to approve or deny Instructor Led Training Exception requests (e.g. availability exceptions, pre-requisite exceptions). This permission works in conjunction with the Event - View and Exceptions - View permissions. This is an administrator permission.	Learning - Administration
Exceptions - View	Grants view-only access to instructor led training exception requests, via the ILT Events and Session screen. This permission works in conjunction with the Events - View permission. This is an administrator permission.	Learning - Administration
Roster - Add Attachments	Grant user the ability to upload files to the Roster page. User must also have Manage Roster or View Roster permission. This is an administrator permission.	Learning - Administration
Roster - Add Pending Users	Grant ability to add pending users to the ILT session roster. The administrator must also have the Roster - Manage or Roster - View permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Roster - Add Users	Grants ability to add named users to class rosters for instructor led training sessions. This permission works in conjunction with the Roster - 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
Roster - Batch Withdrawal or Move Users	Grants ability to withdraw multiple users for an instructor led training session class roster, or to move them from one class roster to another. This permission works in conjunction with the Roster- View permission.	Learning - Administration
Roster - Email Registered Users	Grants ability to send a custom email message to all students listed on the roster for an instructor led training session. An additional link appears on ILT roster page for sending such messages. This is an administrator/ILT instructor permission.	Learning - Administration
Roster - Increase Seats	Grant user the ability to increase the session's available seats when adding users to the session roster if the added users exceed the number of available or reserved seats. User must also have Manage Roster or View Roster permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Roster - View	Grants view-only access to instructor led training session rosters. This permission works in conjunction with Events - View and Sessions - View permissions. This permission can be constrained by Instructor, ILT Provider, User's ILT Provider, and User as Instructor. This is an administrator permission.	Learning - Administration
Roster - View Evaluation Status	Grants ability to view whether students' learning evaluations are pending for a given session. Without this permission, the admin sees status "completed" for any users who are actually in pending evaluation status on the roster This permission works in conjunction with Roster - View permission. This is an administrator permission.	Learning - Administration
Roster - Withdrawal Penalty Override	Grants ability to override the withdrawal penalty when withdrawing a student from an ILT session. This permission works in conjunction with the Events - View, Sessions - View, Roster - View and Roster - Manage permissions. This is an administrator permission.	Learning - Administration
Session Details - View Student Roster	Allows user to view student roster for a given ILT session via a link on ILT session details screen when searching for training, and from transcript details screen after a session has been added to the user's transcript. This is an end user permission.	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
Waitlists - Manage	Grants ability to approve or deny instructor led training waitlist requests. This permission works in conjunction with	Learning - Administration

	the Events - View and Waitlists - View permissions. This is an administrator permission.	
Waitlists - View	Grants view-only access to instructor led training session waitlists, via the ILT Events and Sessions screen, enabling the user to view the waitlists for various ILT sessions. This permission works in conjunction with Events - View and Sessions - View permissions.	Learning - Administration

## New UI - Materials Administration

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

To activate the new Material Administration UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications section, click **ACTIVATE**.

Activation will update the user interface for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- Material Administration main page
- Material Types page
- Material Administration Edit and Create pages

To access Materials Administration, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > MATERIALS](#).

# Before

**General**    Availability    Emails

### Material Details

**Title**

**Material Type**

**Provider** Safety Instruction

**Training Hours**  hours  minutes

**Description**

**Resources** [+ Add Attachment](#)  
No attachments have been uploaded for this Material

**Keywords**

**Available Languages**

**Default Language** English (US)

**Subjects** [+ Add Subject](#)  
 Competencies > Achieving Results  
 Nonprofit

**Credits**

**Material Image**  redwoods-square.jpg

**Material Source**  URL  Upload Material  
Browse and upload the material for this Learning Object. File must be doc, docx, xls, xlsx, ppt, pptx, pps, pptx, pdf, jpeg, jpg, gif, or zip.  
Maximum file size is 50 MB.  
[aquatics-quick-check-camps.pdf](#)

**Target Audience**

**CE Credits**

**Nature of Course**

**Content Level**

**DEI Credits**

### Prerequisites

Users must complete one of the prerequisite options before registering for this training.

[+ Add New Option](#)

Name	Type	Options
------	------	---------



## After

The screenshot displays the 'General' tab of a system interface, specifically the 'Material Details' section. The form contains the following fields and controls:

- Title:** Dare to Lead
- Material Type:** Material-2 (dropdown)
- Provider:** Adobe Test Account
- Training Hours:** 0 hours, 0 minutes
- Description:** (empty text area)
- Resources:** + Add Attachments (button), No attachments have been uploaded for this Material.
- Keywords:** Enter keywords (text input)
- Available Languages:** English (US) (dropdown)
- Default Language:** English (US)
- Credits:** 0
- Material Image:** Browse (button), Upload (button)
- Material Source:**  URL,  Upload Material
- suip radio:**  radio 1,  radio 2
- suip BDD:** Select (dropdown)
- suip checkbox:**
- suip multi checkbox:**  c1,  c2
- suip scrolling text box:** (empty text area)

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Material Version with Append - Manage	Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.  This permission only applies to organizations that are using Versioning with Append for materials.	Learning - Administration
Material Version - Replace Only - Manage	Grants ability to assign a new version of a material to a user. The constraints on this permission determine to which users the administrator can assign a new version of a material. This permission works in conjunction with the Materials Management permission. Without this permission, administrators cannot upload new material source files. This	Learning - Administration

	<p>permission can be constrained by OU, User's OU, and Users. This is an administrator permission.</p> <p>This permission only applies to organizations that are using Simplified Versioning for materials.</p>	
Materials - Add Type	<p>Grants ability to add and edit Material learning object types. This permission works in conjunction with the Materials Management permission. This permission cannot be constrained. This is an administrator permission.</p>	Learning - Administration
Materials Management	<p>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.</p>	Learning - Administration

## New UI - Test Engine Administration

Prior to this enhancement, the Test Engine Administration is upgraded with new pages. With these interface changes, no functionality changes are included.

To activate the new Test Engine Administration UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the Test Administration User Interface Modifications section, click **ACTIVATE**. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

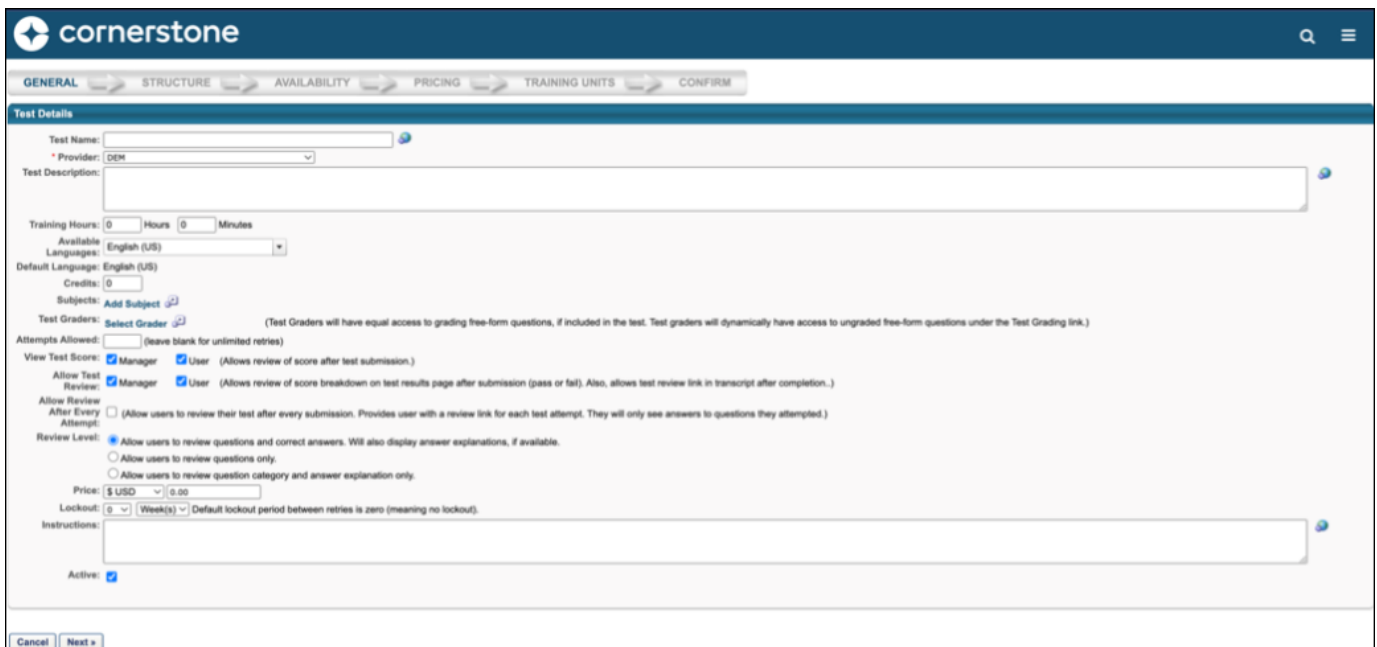
- Test Engine list view screen
- Test creation flow
- Question Bank list view screen
- Question creation flow for all question types
- Categories list view screen
- Categories creation flow

The Test Launch UI modifications include:

- Updated UI for standalone tests
- Updated UI for tests within curricula (legacy player + Curriculum Player 2.0)
- Updated UI for tests within certifications

To access Test Administration page, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > TESTS](#).

## Before



The screenshot displays the 'Test Details' form in the Cornerstone system. The form is organized into several sections with various input fields and checkboxes. At the top, there is a navigation bar with tabs for GENERAL, STRUCTURE, AVAILABILITY, PRICING, TRAINING UNITS, and CONFIRM. The 'Test Details' section includes fields for Test Name, Provider (set to DEM), and Test Description. Below these are fields for Training Hours (0 Hours, 0 Minutes), Available Languages (English (US)), Default Language (English (US)), and Credits (0). There are also links for 'Add Subject' and 'Select Grader'. The 'Test Graders' section includes a note: '(Test Graders will have equal access to grading free-form questions, if included in the test. Test graders will dynamically have access to ungraded free-form questions under the Test Grading link.)'. The 'Attempts Allowed' field is set to 0, with a note '(leave blank for unlimited retries)'. The 'View Test Score' section has checkboxes for 'Manager' and 'User', both of which are checked. The 'Allow Test Review' section has checkboxes for 'Manager' and 'User', both checked. The 'Allow Review After Every Attempt' checkbox is unchecked. The 'Review Level' section has three radio button options: 'Allow users to review questions and correct answers. Will also display answer explanations, if available.' (selected), 'Allow users to review questions only.', and 'Allow users to review question category and answer explanation only.'. The 'Price' field is set to \$ USD 0.00. The 'Lockout' field is set to 0 Week(s), with a note 'Default lockout period between retries is zero (meaning no lockout)'. The 'Instructions' field is empty. The 'Active' checkbox is checked. At the bottom, there are 'Cancel' and 'Next >' buttons.

## After

**cornerstone**

Content > Catalog Management > Test > Create New Test

### Create New Test

**General**

Structure

Availability

Pricing

Training Units

Confirm

**Test Details**

\* Test Name

\* Provider

Test Description

Training Hours  Hours  Minutes

Available Language

Default Language

Credits

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Test Engine - Manage	Grants ability to create and edit/manage tests via the Test Engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Engine - Review	Grants ability to view details of user results for tests, via the test engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Engine - View	Grants ability to view existing tests in the test engine. Administrators with this permission can view each section of a test and print tests. Administrators with this permission can enter changes when viewing a test, but these changes cannot be saved. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

Test Question Bank – Manage	Grants ability to create and edit/update test questions in the test engine question bank. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Question Bank – View	Grants ability to view the test engine question bank. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

## 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.

To activate the new Training Request Approval UI modifications, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the User Interface Modifications section, click **ACTIVATE**.

Activation will update the user interface for Materials Administration, Deep Link Administration, Training Request Approval, ILT Events and Session Administration, Course Catalog Administration, and Curricula Administration. Deactivation will revert back to legacy user interface.

If activated, the new UI appears for the following:

- Training Request Approval page accessed via the Inbox Widget or via the Standard Report - Track Employees - Pending Requests
- Modals that appear when clicking on the Training Title for each approval request
- Approve, Deny, or Defer modals
- Approver and Cost Center delegate and share permissions pages

To access the Training Request Approval page, go to [LEARNING > MANAGE EMPLOYEE LEARNING > MANAGE PENDING REQUESTS](#).

## Before

Home > > View Pending Requests

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

Training Pending Approval

Printable Version Export to Excel (7 Result)

Requested By	Training	Type	Date	Purpose	Options
Res. Chase Admin2 (Division)	Achieving Work Life Balance	Initial	11/30/2021 12:37 PM		✓ ✗

cornerstone

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## After

### View Pending Requests

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

Search Name MM/DD/YYYY Search

Training Pending Approval Printable Version Export to Excel

Requested By	Transcript	Training	Training Type	Type	Date	Purpose
Gooch, Erin mn-all-users (Group) All users (Group) all users2 (Group) loadtest2712 (Group)		CONT-26363 OC1 V2	Online Course	Initial	9/13/2022 12:45 PM	Approve   Defer   Deny

(1 Result)

## Considerations

Clicking on the request by username opens the user's transcript and this page is not included with the Training Request Approval UI modifications.

## Permissions

The following existing permissions apply to this functionality:

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.  <b>Note:</b> Delegating this permission only applies when "Manager" is designated in the Approval Workflow. If the Approval Workflow contains a custom employee relationship - even if the Manager happens to fill that role - the approval will not flow to the delegate.	Learning
Employee Transcripts - Manager/Approver Access	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.  <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>  <b>Note:</b> <i>The User's Direct Subordinates constraint allows administrators to constrain the data that a user can view to only the data for their direct reports. The user will not be able to view their own data with this constraint.</i>  <b>Note:</b> <i>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</i>	Reports - Track Employee

*constraints, even if they are not selected in the permission constraints for the role.*



## Versioning Redesign Enhancements - General Availability

Prior to this enhancement, preventing erroneous versioning and assignment of training to end users was costly for organizations which resulted in extra administrative time for troubleshooting, leading to compliance and training completion tracking issues.

This enhancement provides new Curriculum versioning workflows for consistent and reliable behavior whenever a Curriculum Child Learning Object (LO) is versioned or whenever a Curriculum structure is modified simultaneously, so that the right users get the right training at the right time while maintaining compliance with respect to tracking training completions.

The enhancement enables enhanced performance optimizations for back-to-back versioning including administrator and Child LO versioning for Curriculum.

The new versioning workflows are now available in the General Availability for all customers in the July 2023 Release.

### How Does this Enhancement Benefit My Organization?

- Administrators who can version Curricula can see if the versioning is still in progress via an icon if versioning happened through administrator structure changes.
- Administrator overhead to troubleshoot is significantly reduced as this avoids and prevents erroneous versioning and assignment of training to end users for back-to-back scenarios.
- Robust and reliable workflows make sure that the users are always assigned the right version of the Curriculum or Curriculum Child LOs to remain compliant.
- Provides improved reliability, scalability, and quality with system versioning flows.

### Use Cases

**Use Case 1:** Materials or online course LOs belonging to the same Curriculum are versioned back-to-back. It creates the latest version of all Materials or Online Course LOs in the latest version of the Curriculum (Child LO Versioning).

**Use Case 2:** Material M1v1 is part of Curriculum C1v1 and M1v1 is versioned to M1v2. However, if Material M3v1 is added to Curriculum C1v1 via administrator structure changes causing the Curriculum to version, then the Curriculum will have M1v2 and M3v1 in the latest Curriculum version, thus maintaining consistency.

**Use Case 3:** Material M1v1 is part of Curriculum C1v1 and M1v1 is versioned to M1v2. However, if M1v1 is removed from C1v1 via administrator structure changes, then the Curriculum will not get versioned, as Child LO Material M1v1 will be removed from the Curriculum structure.

**Use Case 4:** Curriculum C1v1 is a child LO under the Parent Curriculum C2v1. If we version Material M1v1 to M1v2 under C1v1, triggering the child LO versioning flow, C1v1 will be versioned to C1v2, and C2v1 gets versioned to C2v2. But if we version C1v2 to C1v3 via an administrator structure change, then C2v2 remains C2v2 and no parent Curriculum versioning happens.

**Use Case 5:** In case of Curriculum versioning via Structure changes by Admins, when there are two Materials in the Curriculum Structure, M1v1 and M1v2 which are versioned using Append mode and both are Active (old version has still not expired) then Admin tries to remove M1v1 to create to create new version before expiration of older one, then M1v1 will not be removed from the structure in the new version which will be created. It will be removed only once it expires. Customers need to review changes in case of Append scenarios accordingly.

## Considerations

- This enhancement supports only versioning that occurs due to administrator structure changes or Child LO versioning.
- This enhancement is specific to the back-to-back versioning scenarios that lead to versioning inconsistencies for curricula.

## Frequently Asked Questions (FAQs)

What happens when a child LO is removed from the Curriculum structure by an administrator and at the same time child LO versioning requests occur for the same LO?

In this case, the Curriculum versioning will not happen as the Child LO no longer exists in the Curriculum Structure.

## Implementation

Enhanced Versioning will be enabled in phases based on the customer's swimlane.

SWIMLANE	DEPLOYMENT DATE
AU SL1 (AWS)	21 July 2023
CDG SL4 (AWS)	21 July 2023
JP SL1 (AWS)	21 July 2023
FRA SL1 (AWS)	28 July 2023
CDG SL1 (AWS)	28 July 2023
UK SL4 (AWS)	28 July 2023
LAX-SL1	11 August 2023
LAX-SL2	11 August 2023
LAX-SL4	18 August 2023
LAX-SL5	18 August 2023
UK SL1 (AWS)	18 August 2023
UK SL2 (AWS)	25 August 2023
US SL1 (AWS)	25 August 2023
UK SL3 (AWS)	1 September 2023
US SL2 (AWS)	8 September 2023
LAX-SL3	15 September 2023

# Learning - Content

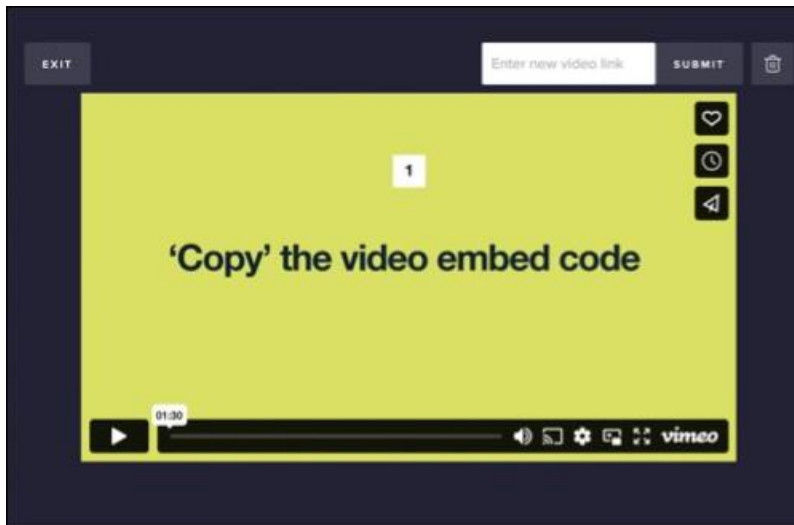
## Create Tool Enhancements - Embed Videos

Prior to this enhancement, content creators were unable to leverage existing video resources on the web to augment their learning materials, thereby limiting them to creating content from scratch or using multiple creation experiences.

With this enhancement, embed externally hosted videos from the web to quickly create engaging content by leveraging already existing materials.

To access this feature, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CREATE TOOL](#).

To embed videos, copy the embed code of a video from the web and insert the copied embed code into the video card. Change the link anytime or delete the video to upload a video file instead.



### How Does this Enhancement Benefit My Organization?

- Authors can create more engaging content by utilizing embedding videos from the web.
- Users can have a more dynamic engaging medium for visual learning.

### Implementation

Upon release, this functionality is automatically enabled in production environment for all organizations using Create Tool. This functionality is not available during User Acceptance Testing (UAT).

### 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	Learning - Administration

	<p>(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
Create Tool	Grants access to Create Tool for content authoring. This permission cannot be constrained.	Learning - Administration

## Create Tool Enhancements - Personalized Branding

Prior to this enhancement, administrators did not have the flexibility to change logos and primary colors from default settings to personalize the branding and maintain consistency across the portal.

With this enhancement, administrators can change default logos and set primary colors at the portal level to apply to all content. Making changes here automatically applies the change in logo to all new and previously published courses.

To access this feature, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CREATE TOOL](#).

To set a primary color, follow the steps:

- Navigate to Profile > Settings.
- Upload an image to be used as a logo.
- Set the primary color for buttons.

### How Does this Enhancement Benefit My Organization?

It elevates your content across the portal with personalized branding options.

### Implementation

Upon release, this functionality is automatically enabled in production environment for all organizations using Create Tool. This functionality is not available during User Acceptance Testing (UAT).

### 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> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration
Create Tool	Grants access to Create Tool for content authoring. This permission cannot be constrained.	Learning - Administration

## Create Tool Enhancements - Quizzes

With this enhancement, users can create interactive quizzing options to allow for more learner engagement throughout the course and knowledge checks which contribute to more effective and efficient learning outcomes.

To access this feature, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CREATE TOOL](#).

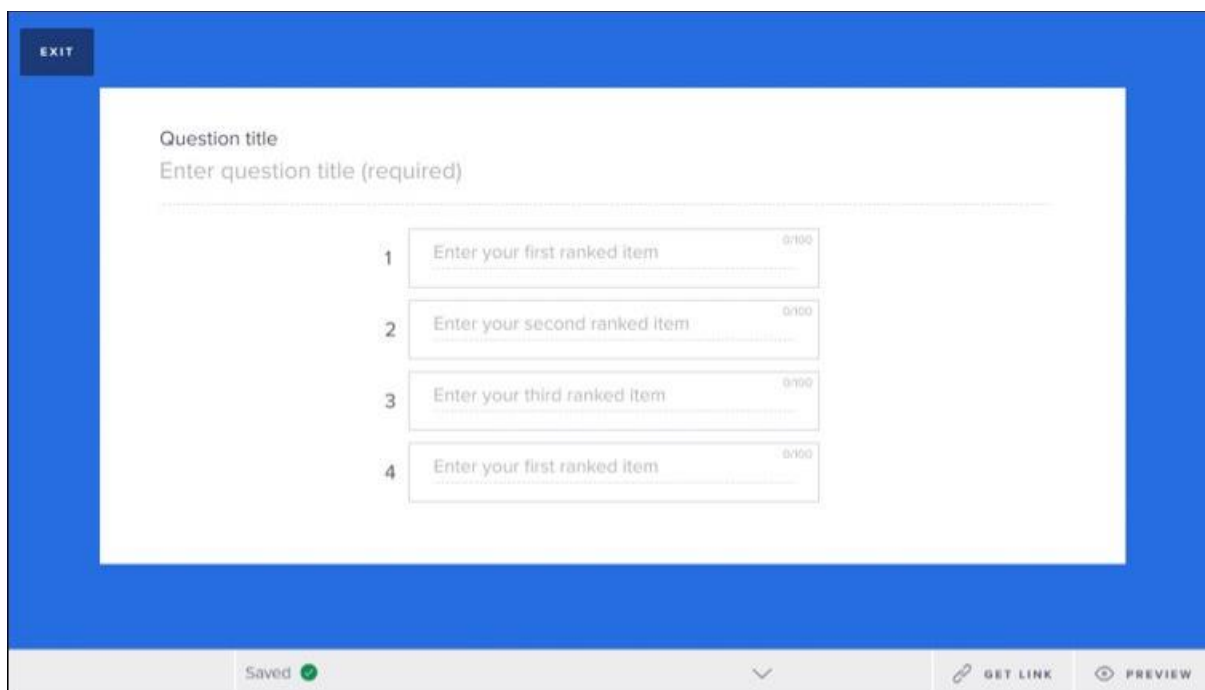
### How to add a Quiz

- Start with creating a course.
- Choose any of the quiz cards available to the course.
- After selecting the type of quiz, add the prompts and responses.

### Ranking Quizzes

Ranking quizzes are beneficial to determine the relative importance, priority, or sequence of items. This type of quiz assesses the ability to prioritize or order items based on specific criteria.

- The authors can define options and set the correct ranking order.

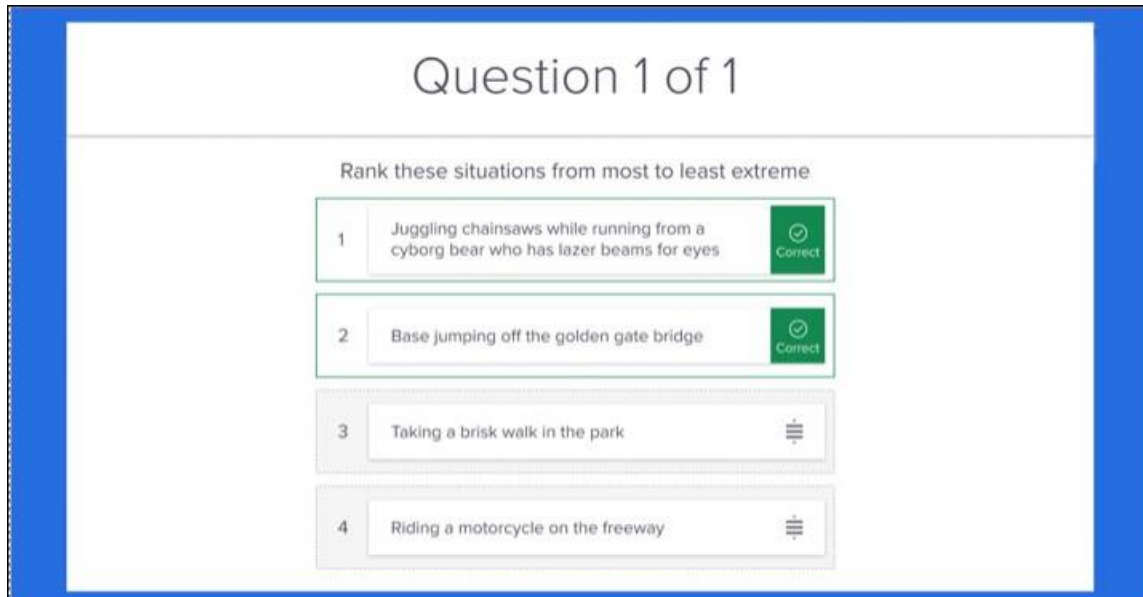


The screenshot shows a quiz creation interface with a blue header and footer. The main content area is white and contains the following elements:

- EXIT** button in the top left corner.
- Question title** section with the prompt "Enter question title (required)" and a text input field.
- A list of four ranking items, each with a number and a text input field:
  - 1 Enter your first ranked item (0/100)
  - 2 Enter your second ranked item (0/100)
  - 3 Enter your third ranked item (0/100)
  - 4 Enter your first ranked item (0/100)
- Saved** status indicator with a green checkmark in the bottom left.
- A dropdown arrow in the bottom center.
- GET LINK** and **PREVIEW** buttons in the bottom right.

- The options are presented to learners in random order. The learners can click and drag jumbled options in the right order.

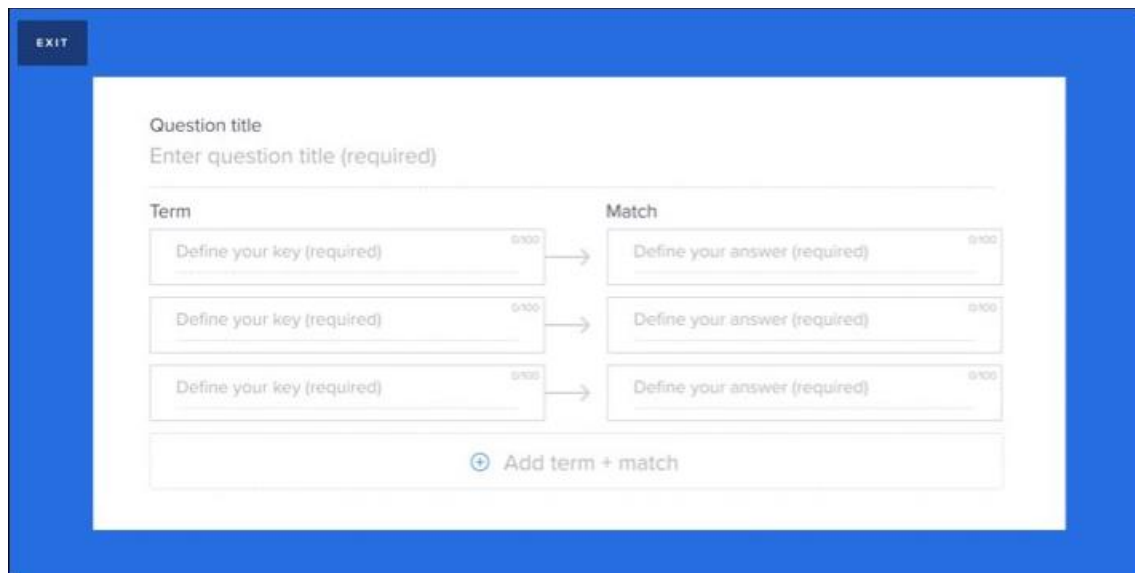




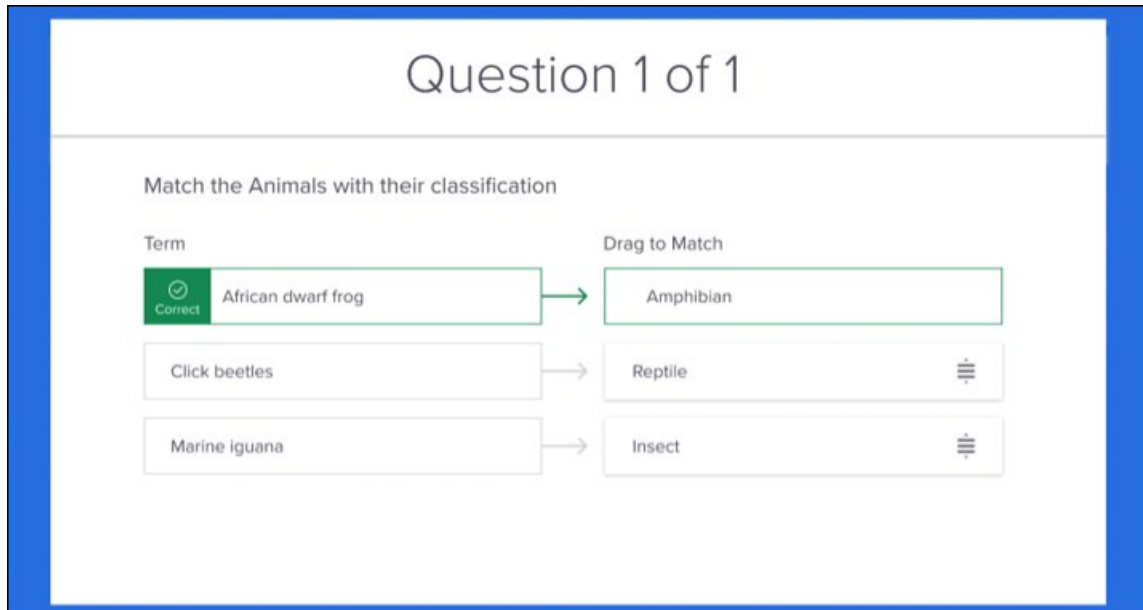
## Matching Quizzes

Matching quizzes are beneficial for testing and reinforcing associations between different items or concepts.

- The authors can define options with the right match.



- The options are presented to learners in random order. The learners can click and drag jumbled options to match the values.



The ranking and matching of quizzes are also optimized for mobile browsers.

### How Does this Enhancement Benefit My Organization?

- Create more engaging content and assess knowledge, promote learning, and enable learners to develop skills.
- Learn through interactions and knowledge checks.

### Implementation

Upon release, this functionality is automatically enabled in production environment for all organizations using Create Tool. This functionality is not available during User Acceptance Testing (UAT).

### 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 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.	Learning - Administration

	<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
Create Tool	<p>Grants access to Create Tool for content authoring. This permission cannot be constrained.</p>	Learning - Administration

## Deprecation of Course Builder, Module Builder, Asset Importer with the November '23 Release

Course Builder, Module Builder, and Asset Importer were designed as an authoring tool to build proprietary or customized courses. Despite low usage, there is a relatively high volume of defects reported. In addition, Cornerstone provides the Create Tool as its premium authoring tool offering.

With these points in mind, Cornerstone has decided to deprecate these products with the November '23 Release. When this occurs, customers will no longer have access to Course Builder, Module Builder, or Asset Importer.

### Limited Offer of Create Tool for Affected Customers

For organizations actively using Course Builder, Cornerstone is offering a limited offer for Create Tool (usually a separate fee):

- Two free licenses to Create Tool for the duration of the current contract or for a 12-month period (whichever occurs first)
- This offer applies to customers who are actively using Course Builder and is available from the release announcement date (June 12, 2023) for two months (until August 14, 2023)
- Details should be coordinated with your Account Manager

### Deprecation Milestones

- August 14, 2023: Last Day for Create Tool Requests
- September 8, 2023: End of Support
- November 17, 2023: Full Deprecation

### Frequently Asked Questions (FAQs)

**Question Answer Will I still be able to access courses created with the Course Builder after it is deprecated?**

Yes. Courses from the Course Builder are created as SCORM packages and can continue being used.

**Who can apply for two free licenses to the Create Tool?**

Content Operations will be provided with a closed list of portals that have actively used the Course Builder in the past 12 months. Account Managers can confirm whether or not a customer is listed.

**If I have already purchased a Create Tool license, am I eligible for two free (additional) licenses?**

No, this offer is available only to customers of Course Builder who have not purchased a Create Tool license.

**Is there feature parity between the Course Builder and Create Tool?**

Create Tool has the full functionality of Course Builder.

### Resources

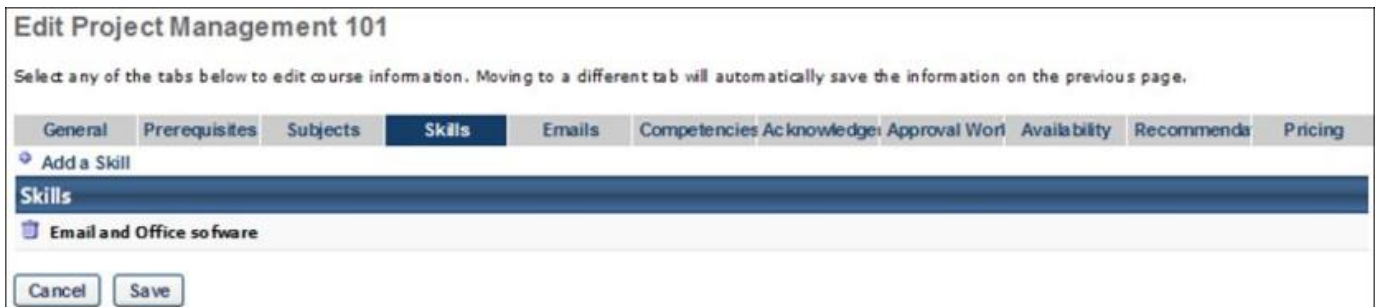
- [Create Tool - Overview](#)
- [Create Tool Starter Guide](#)

## Hide Legacy Skills Tab on Edit Training Page UI with the November '23 Release

Prior to this deprecation, Cornerstone CSX had two systems of skills: Legacy Skills and the Skills (Capabilities). The Legacy Skills is the older functionality while the Skills (Capabilities) is the current skill system powered by Cornerstone Skills Graph for its machine learning. Skills (Capabilities) is widely utilized by the customer base and receives constant innovation. The Legacy Skill system exists as a separate functionality that displays a different dataset of skills when compared to Skills (Capabilities).

With this November 2023 release, the Legacy Skills tab will be hidden from the Edit Training section in Course Catalog by default. Administrators can contact Global Customer Support to retain the Skills tab on the UI. When the deprecation occurs with the November 2023 release, the legacy "Skills" tab will be hidden from the UI by default.

To access the Legacy Skills tab in Edit Training, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG > EDIT > SKILLS](#).



The screenshot shows a web interface titled "Edit Project Management 101". Below the title is a instruction: "Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page." There is a horizontal menu with several tabs: "General", "Prerequisites", "Subjects", "Skills" (which is highlighted in dark blue), "Emails", "Competencies", "Acknowledgements", "Approval Work", "Availability", "Recommendations", and "Pricing". Below the "Skills" tab, there is a sub-section titled "Skills" with a plus icon and the text "Add a Skill". Underneath, there is a list item "Email and Office software" with a trash icon. At the bottom of the interface are two buttons: "Cancel" and "Save".

### How Does this Deprecation Benefit My Organization?

This deprecation removes the confusion caused by two distinct collections of skills related to content but also allows the administrators to keep the Skills tab visible if required.

### Considerations

- This deprecation only affects the display of legacy Skills on Content. No other part of CSX that uses legacy Skills is affected by this change.
- Customers can request a detailed report of their legacy Skills associated with Learning Objects. To do so, contact your Account Manager before 5 September 2023.
- Customers can opt out to keep the legacy Skills tab visible. To do so with no disruption to the legacy Skills tab, contact Global Customer Support before 9 November 2023.

### Implementation

This deprecation will be enabled on November 17, 2023.

# Learning - Extended Enterprise

## Stripe Payment Processor - Refunds

Prior to this enhancement, refunds could only be initiated directly through the Stripe account of the customer for the Stripe Payment gateway.

With this enhancement, administrators can now initiate refunds directly using the CSX Extended Enterprise module for payment transactions that were executed via the Stripe Payment gateway. This process does not require manual login to the Stripe account by the administrator. Refunds can be initiated by the user from the CSX user's Transcript page itself if allowed by the Learning Object (LO) settings. For more information, refer to [Stripe – Payment Gateway](#).

Refunds can be initiated by any user authorized to do so such as administrators, user's managers, etc. using the Manage Transactions page. To initiate a refund, follow these steps.

1. Go to [ADMIN > TOOLS > LEARNING > E-COMMERCE > MANAGE TRANSACTIONS](#). Find a transaction and click **OPTIONS**.
2. In the Order History Details Page, click the Options icon under the Details section.
3. In the Pricing Test, enter the refund amount beside the Amount option. Make sure to select Refund from the Amount drop-down.
4. Type a note in the Notes section if required and click **SUBMIT** to initiate the refund.
5. View refund details under the Order History section on the Order History Details Page. You can also check the order status in your Stripe account.

### How Does this Enhancement Benefit My Organization?

This enhancement provides a seamless refund experience.

### Considerations

The refunds are an enhancement to the existing Stripe Payment Gateway.

### Implementation

This enhancement is automatically available with the Stripe Payment Gateway feature.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Refund Training	Grants ability to issue a refund for a training item while removing it from the user's transcript. This is an administrator permission.	eCommerce - Administration
Remove Training	Grants ability to remove training from other users' transcripts (training records) when viewing their transcript. This permission can be constrained by OU, User's OU, User's Corporation, User Self and Subordinates, User's Self, User's Direct Subordinates, and User. This is an administrator permission.	Learning - Administration

Transaction Manager - Manage	Grants ability to access the Manage Transaction page and also create and edit transactions. On the Order History Details page, the administrator can edit the order status, adjust prices, issue refunds, or enter comments. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration
Transaction Manager - View	Grants ability to view the Manage Transaction page where the administrator can review the transactions that meet their permission constraints. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration



# Learning - Training Capabilities

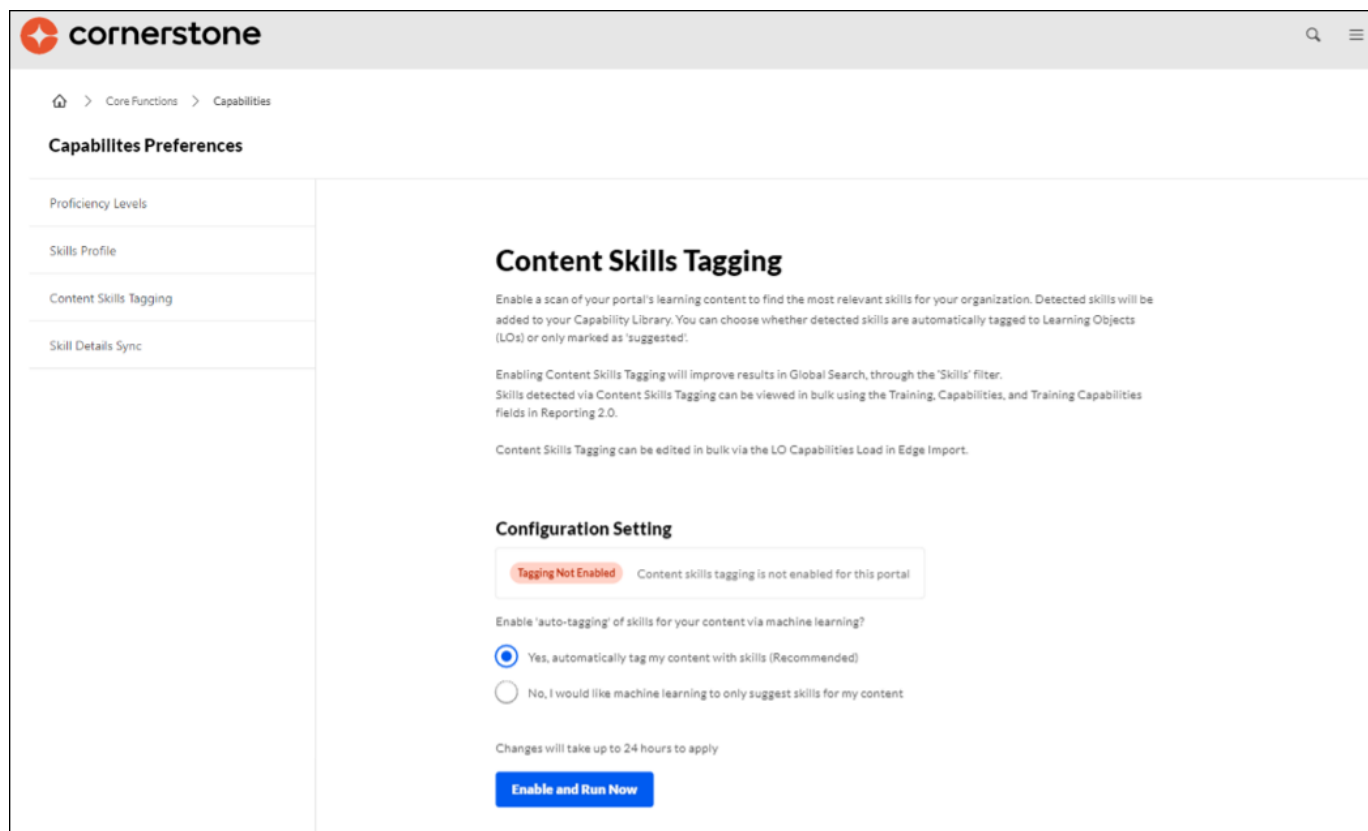
## Configuration Added to Content Skills Tagging Enablement Page

With this enhancement, the Content Skills Tagging page now includes a configuration setting that enables administrators to choose whether skills detected from machine learning are automatically tagged to a Learning Object (LO) or only marked as 'Suggested'.

If the configuration setting is set to "Yes, automatically tag my content with skills (Recommended)", the detected skills are automatically added to an LO. If the configuration setting is set to "No, I would like machine learning to only suggest skills for my content", the detected skills are saved as 'Suggested' for an LO.

**Note:** Regardless of the configuration, administrators may continue to manually add skills to LOs via Edge Import.

To access Configuration Setting on the Content Skills Tagging page, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PREFERENCES > CONTENT SKILLS TAGGING > CONFIGURATION SETTING](#). After selecting an option, click **ENABLE AND RUN NOW**.



The screenshot shows the 'Content Skills Tagging' configuration page in the Cornerstone system. The page is titled 'Content Skills Tagging' and includes a sidebar with navigation options: Proficiency Levels, Skills Profile, Content Skills Tagging (selected), and Skill Details Sync. The main content area contains the following information:

- Content Skills Tagging:** A section explaining that it scans portal learning content for relevant skills and allows administrators to choose whether skills are automatically tagged to Learning Objects (LOs) or marked as 'suggested'.
- Enabling Content Skills Tagging:** A note stating that enabling this feature will improve search results and that skills detected can be viewed in bulk using the Training, Capabilities, and Training Capabilities fields in Reporting 2.0.
- Configuration Setting:** A section with a status indicator 'Tagging Not Enabled' and a message 'Content skills tagging is not enabled for this portal'. Below this, there are two radio button options:
  - Yes, automatically tag my content with skills (Recommended)
  - No, I would like machine learning to only suggest skills for my content
- Changes will take up to 24 hours to apply**
- Enable and Run Now** button

The enhancement affects the status shown on the Training Capabilities report in Reporting 2.0, what skills are shown on the Course Console, and which Learning Objects (LO) are shown as results in the Related Learning widget and Search's Skills filter.

### How Does this Enhancement Benefit My Organization?

- Grants control over what skills are tagged to content and their effect on the Skills Filter in Search and Related Learning results.
- Improved UI for the page and clearer user flow for the skills enablement process.

- Affects what Learning Objects are shown via the Skills Filter in Search, and Related Learning results (from their Skills Profile).

## Considerations

- If the configuration is set to 'No, I would like machine learning to only suggest skills for my content', the LOs shown in the Related Learning widget and the Skills Filter for Search are only impacted by administrator-tagged skills.
- As Suggested Skills do not influence the Related Learning widget or the Skills filter, the onus falls on the administrator to tag content with skills manually if they select the configuration 'No, I would like machine learning to only suggest skills for my content'.
- A customer's custom skills are only considered in Content Skills Tagging if they are marked as equivalent to a Skills Graph skill (See [Linked Skills](#) in Online Help).

## Frequently Asked Questions (FAQs)

### How long does it take for a portal to be tagged with skills?

Once Content Skills Tagging is enabled, the page is locked for 24 hours. This is the case both for initial enablement and subsequent configuration changes.

### Why can't I see the tab called Content Skills Tagging on the Capabilities Preference page?

Your portal first needs to onboard to Capabilities through the Skills Wizard. After your Capability Library is populated with skills, you will see the Content Skills Tagging tab.

### Can I turn off Content Skills Tagging after it is enabled?

No, this is a one-time action. Please consider trialing in Stage or Pilot before Production.

### After enablement, can I change my configuration setting?

Yes, changing your configuration setting triggers a re-tagging of your portal's content and updates the status of your skills from Auto-tagged to Suggested, or vice versa. This change takes up to 24 hours.

### How does the Machine Learning model identify which skills to tag to an LO?

The model scans key metadata fields for each LO (Title, Description, Keywords, Subjects). Based on this data, the model identifies skills as a 'Strong Match' or a 'Weak Match'. If Auto-tagging is configured, 'Strong Match' skills are tagged to LOs.

### Does that mean that a 'Strong Match' skill can be either 'Auto-Tagged' or 'Suggested'?

Yes, based on the configuration setting, Strong Match skills are either Auto-Tagged or Suggested. This impacts what skills are tagged to your LO, which affects results in Search's Skills Filter and the Related Learning widget, the status of skills in a Training Capabilities report in Reporting 2.0, and which skills are shown for an LO on the Course Console.

### What is the benefit of seeing Suggested skills in reports?

Administrators can decide whether to manually add these skills to an LO. This human input feeds back into Cornerstone's Machine Learning model, improving future skills recommendations.

## Implementation

This enhancement is enabled by default for all organizations.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Preferences - Manage	Grants the ability to create and edit expertise levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration

# Learning - Integrations & APIs

## **Catalog Search API Enhancements**

With this enhancement, learning objects of training type "Online Content," "Playlist," and "External Content" are now included in the response. This enables organizations to better support integrations with content providers.

### **Implementation**

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

## **Learning Assignment API - OU Support**

Previously, organizations could use the Learning Assignment API to assign training to individual users.

With this enhancement, a new "orgUnits" parameter is available for the Learning Assignment API. This enables organizations to assign training to specific organizational units (OUs).

The following features are supported:

- Multiple OUs
- Standard OUs, custom OUs, and groups
- "Include subordinates" settings

### **Implementation**

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

## **Learning Assignment API - Remaining Count**

Previously, organizations had to manage their remaining user assignments independently, which was difficult to implement and maintain.

With this enhancement, a new Get Remaining Count API returns the count of remaining user assignments per day for the date provided. This helps manage throttling limits.

### **Considerations**

By default, organizations can create 60,000 user assignments per day.

### **Implementation**

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



## **Transcript API (Open Beta)**

The Transcript API is a bundle of APIs providing access to the learner's transcript. The APIs follow the same business logic, security, rules, and events from the portal's configuration.

With this release, the Transcript API supports the following features:

- Data APIs (GET): Overview API; Detailed APIs; filters, multi-language support
- Request API: Request training; Employee perspective
- Assign API: Assign training; Manager and Learning Administrator perspective
- Remove API: Remove training; bi-directional

Because this is currently an Open Beta, it is only available in Stage environments for testing and feedback. During this time, throttling limits are limited and APIs may change.

### **Transcript API (Open Beta) Community**

The Transcript API (Open Beta) Community in the Success Center provides the following:

- API overview
- Milestone plan
- Question forum
- Feedback forum

### **Implementation**

This functionality is available to be enabled and tested in Stage environments during the open beta.

Review the API documentation for new permissions, constraints, and scopes.

## Webex Meeting Center vILT Integration Upgrade

Webex has modernized a set of APIs that impacts the Cornerstone CSX Learning and Webex Meeting Center integration.

The new Webex Meetings REST API enables seamless integration of Webex Meetings into your websites, apps, and services. Use Webex to schedule meetings, invite meeting attendees, update preferences, and more. The APIs used in the integration is replaced in the existing integration so that the transition for the customer is as smooth as possible. The key features of this enhancement are as follows:

- Create, update, and cancel sessions
- Create, update, and delete instructor
- Launch session as instructor and learner
- Report attendance from Webex to CSX
- Extended Options
- A new setting called New Edge Tile
- A new OAuth Workflow to authenticate instructors while using the integration

This functionality will be available as a new tile titled 'Webex Meeting Center – REST API' for all customers in Edge Marketplace to be added as a Trial in Pilot and Stage environments.

New customers should reach out to their Account Manager to purchase the integration for Production.

### How Does this Enhancement Benefit My Organization?

This integration provides a flexible way of setting up connection between Webex and Cornerstone CSX.

### Frequently Asked Questions (FAQs)

[Are customers using multiple accounts supported? Do we have a workaround?](#)

A: The Webex Meeting Center - REST API to be released with the July '23 release provides support to add only one Webex Account. As workaround, customers can continue to use the existing setup option available through the Vendors page (ILT > Vendors & Trainers) to add their REST API settings to each of them.

[Is SSO supported with the new integration?](#)

With the release of the new REST API, Webex removed the possibility to authenticate via SSO through the backend to perform some actions on behalf of other users, for instance launching a meeting on behalf of a host. Since authentication through the REST API is done via OAuth, it becomes necessary for instructors (Webex hosts) to go through an OAuth Workflow the first time they launch a meeting from CSX. More details are available in the integration guide.

[Details about Deprecation of XML APIs?](#)

<https://developer.webex.com/docs/webex-xml-api-deprecation-announcement>.

### Implementation

For customers already using Webex Meeting Center integration, contact Global Customer Support to enable the Edge Tile in Production.

This integration is available as a new integration in Edge Marketplace titled 'Webex Meeting Center – REST API'.

# Performance

# Check-Ins

## Check-Ins Insights

Prior to this enhancement, the Check-Ins home page provided meeting information only.

With this enhancement, a new Check-Ins Insights page is provided that contains an Upcoming Meetings section, a Notifications section, and a Follow-Ups section that provides notifications to managers and employees about meetings and follow-ups.

The screenshot displays the 'Check - In Insights' dashboard. It is divided into three main sections:

- Upcoming Meetings:** A calendar view showing meetings for the week of Feb 1-3. Meetings include Aaron Abrams (1:1 Check-In), Cam Collard (1:1 Check-In), Vanessa Smith (Mentoring Catch-up), Lucy Miller (Mentoring Catch-up), and Bella Bridgers (1:1 Check-In). A 'View all' button is present.
- Follow-Ups:** A donut chart showing a total of 5 follow-ups. The breakdown is: 1 Overdue (red), 1 Due soon (yellow), and 3 Due later (grey). A 'View details' button is present.
- Notifications:** A list of recent notifications with timestamps and action buttons. Examples include: 'Aaron Abrams has added new notes to your 1:1 Check In' (Now), 'Cam Collard has cancelled your Monthly Catchup meeting for Jan 10th' (4h), 'You have an upcoming meeting with Megha Gupta on Dec 16 2022.' (2d) with an 'Add Notes' button, 'You cancelled last 2 meetings with Lisa Lee.' (1w) with a 'Create a New Check-In' button, 'You have 2 open meetings from last week.' (2d) with an 'Update Meeting Status' button, 'Lisa Lee has re-opened a meeting.' (1w), and 'You have 2 follow-ups overdue.' (1w).

### Upcoming Meetings Section

Prior to this enhancement, Check-Ins only displayed meetings within the upcoming seven days. With this enhancement, the user can see up to six upcoming meetings, but can view all upcoming meetings by clicking the **VIEW ALL** button to open the Upcoming Meetings flyout.

Meetings are ordered by date. If a user has multiple meetings on the same date, the meetings are ordered alphabetically.

Users can click any meeting to see the meeting details.

### Follow-Ups Section

Prior to this enhancement, users were able to view Follow-Ups by status within the upcoming seven days.

With this enhancement, the user can immediately see the total number of follow-ups by status across all Check-Ins meeting series in which the user is a participant.

Follow-Up status is as follows:

- Overdue: The follow-up due date is passed.
- Due soon: The follow-up is due in the next seven days.

- Due later: The follow-up is due after the next seven days.

Users can click the **VIEW ALL** button or any follow-up status to open the Follow-Ups flyout. The flyout displays all incomplete follow-ups by due date and assignees, ordered by status and due date. Click any meeting series name to open the selected follow-up in the meeting.

- **Mark a follow-up completed:** To mark a follow-up complete, check its check-box. **Note:** *While the flyout is open, marking a flyout complete puts a line through the flyout. Once the flyout is closed, the completed flyout is removed.*
- **Filter follow-ups:** Filter the list of follow-ups by using the Assigned to and Status options.

## Notifications Section

The Notifications section displays the user's notifications for any of their follow-ups. Users can also add notes or update their meeting status in this section.

Notifications are ordered by date. The time the notification was updated also appears. Past or deleted notifications are automatically hidden. Users receive one notification per meeting in a series.

A blue dot indicates that no action has been taken on a notification. Hovering over an unactioned item highlights the item.

Users can view and manage the following notification types:

- A meeting participant rescheduled the meeting: Clicking the notification takes the user to the rescheduled meeting. If the user dismisses the notification, they will no longer receive notifications for this meeting.
- An upcoming meeting has not been opened or notes added: Clicking the Add Notes button takes the user to the upcoming meeting. If the user add notes to the meeting, the notification disappears from the list.
- A meeting participant added notes to a meeting: Clicking on the notification opens the latest note added in the meeting series. If the user dismisses the notification, they will no longer receive notifications for this meeting.
- The meeting status is open for a past meeting: If the user has open meeting status within the past seven days, clicking the **UPDATE MEETING STATUS** button opens the Meeting Status flyout so the user can manage the status. Clicking a participants name opens the associated meeting.
- A meeting participant cancels the meeting: Clicking the notification opens the cancelled meeting. If multiple meetings are cancelled, the latest meeting cancelled opens.
- A participant reopened a meeting that the user cancelled or completed: Clicking the notification opens the reopened meeting.
- A user or other meeting participant has overdue follow-ups: Clicking the notification opens the Follow-Ups flyout filtered by assignee and status.
- A user has a follow-up due soon. Clicking the notification opens the Follow-Ups flyout filtered by assignee and status.

Actioned meeting items no longer have a blue dot next to them in the notifications list.

## Implementation

- This functionality is automatically enabled for all organizations using the Check-Ins module.

- Administrators can disable the Check-Ins Insight page by going to [ADMIN > PERFORMANCE MANAGEMENT > HOME PAGE CUSTOMIZATION](#). Click on the appropriate division name to customize the Check-Ins homepage for that division.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	<p>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 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>	Performance
Check-Ins - Home Page Customization - Manage	Grants ability to manage the Check-Ins Home Page. This permission can be constrained by OU. This is an administrator permission.	Performance

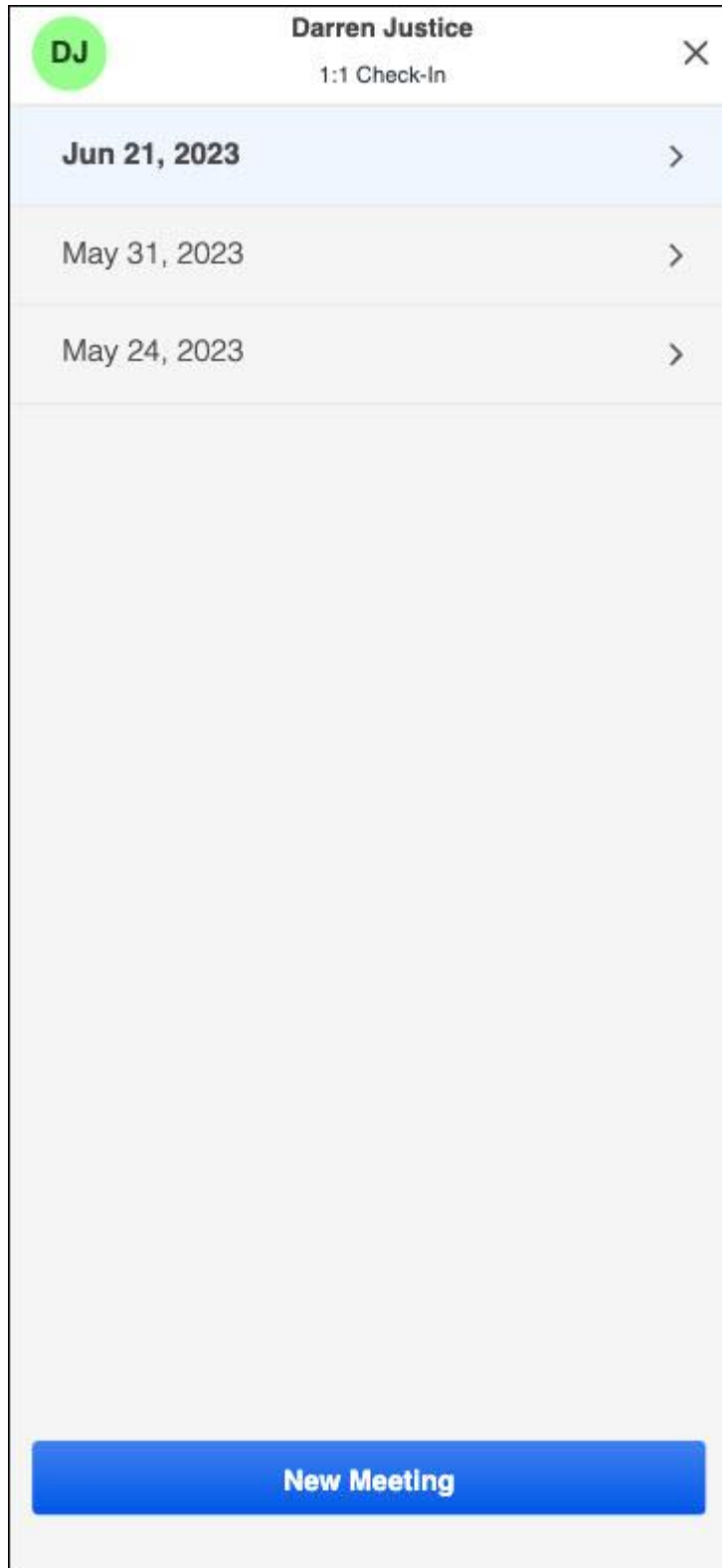
## Check-Ins Mobile Enhancements

With this release, mobile users will be able to easily create and access Check-Ins meetings and resources.

The new Check-Ins new mobile enhancements allow users to easily access all meeting features and resources as follows:

- **Meeting series icon:** Clicking the meeting series icon opens a flyout that lists of all meetings in the series. On this list, users can:
  - Select a specific meeting to view its details.
  - Click the **NEW MEETING** button to create a new meeting in the series. This new meeting is based on the current meeting frequency.
  - Click the "x" in the top right of the screen to go to the Check-Ins mobile home page.





- **Expanded ellipsis** The new expanded ellipses on the main page lets users:

- Mark a meeting completed
- Cancel a meeting
- Create a new meeting
- Switch to topic view
- Delete a meeting
- Access Check-Ins settings

**DJ** **Darren Justice** 1:1 Check-In

6/21/2023 Open

**What are you working on?**  
Take a minute to discuss your current work and project timelines.

**RF** **DJ** Collaborate here...

**RF** Add a comment...


**How are you doing? How are your goals coming along?**  
Use this opportunity to review your individual / team goals: track and update progress, prioritize work, and recognize wins.

**RF** **DJ** Collaborate here...

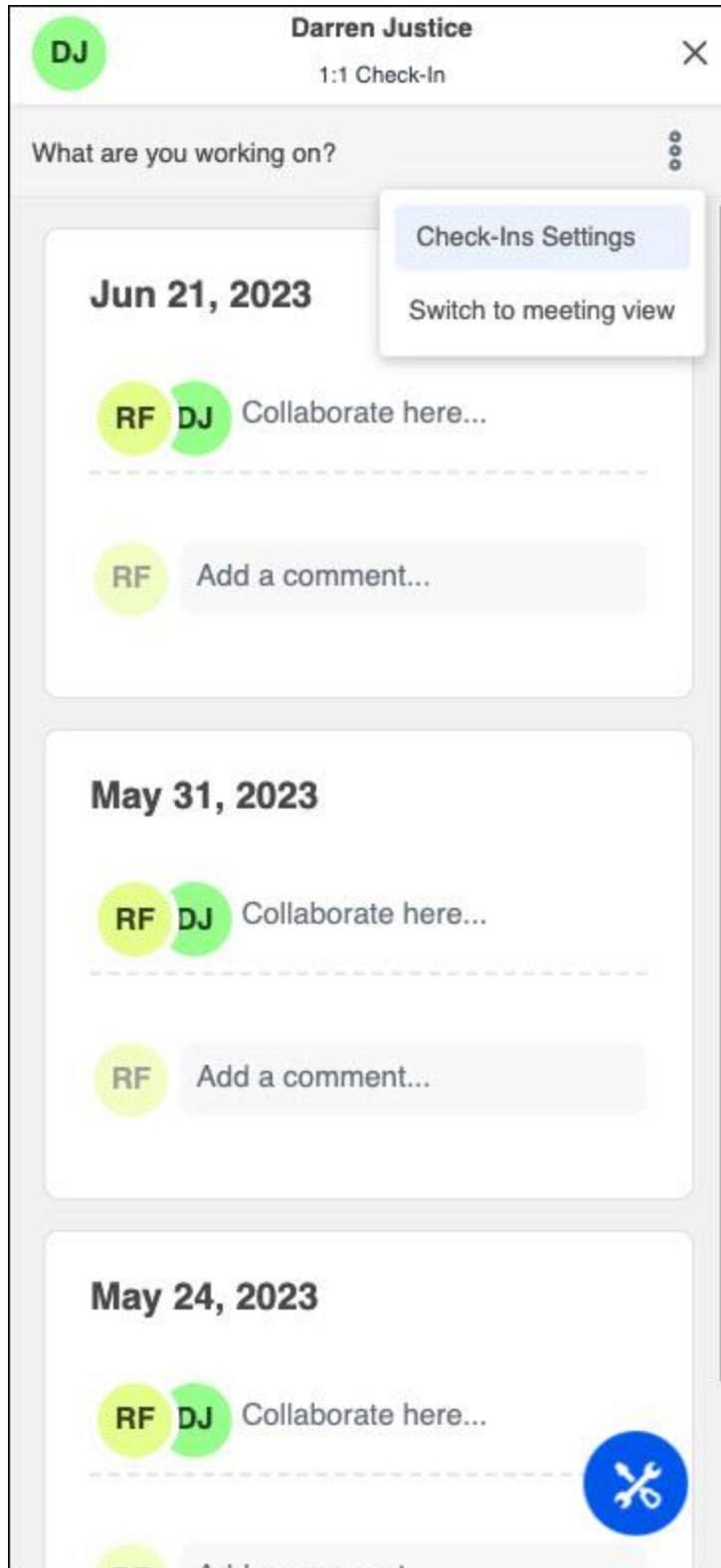
**RF** Add a comment...

**Is there anything that's blocking you?**

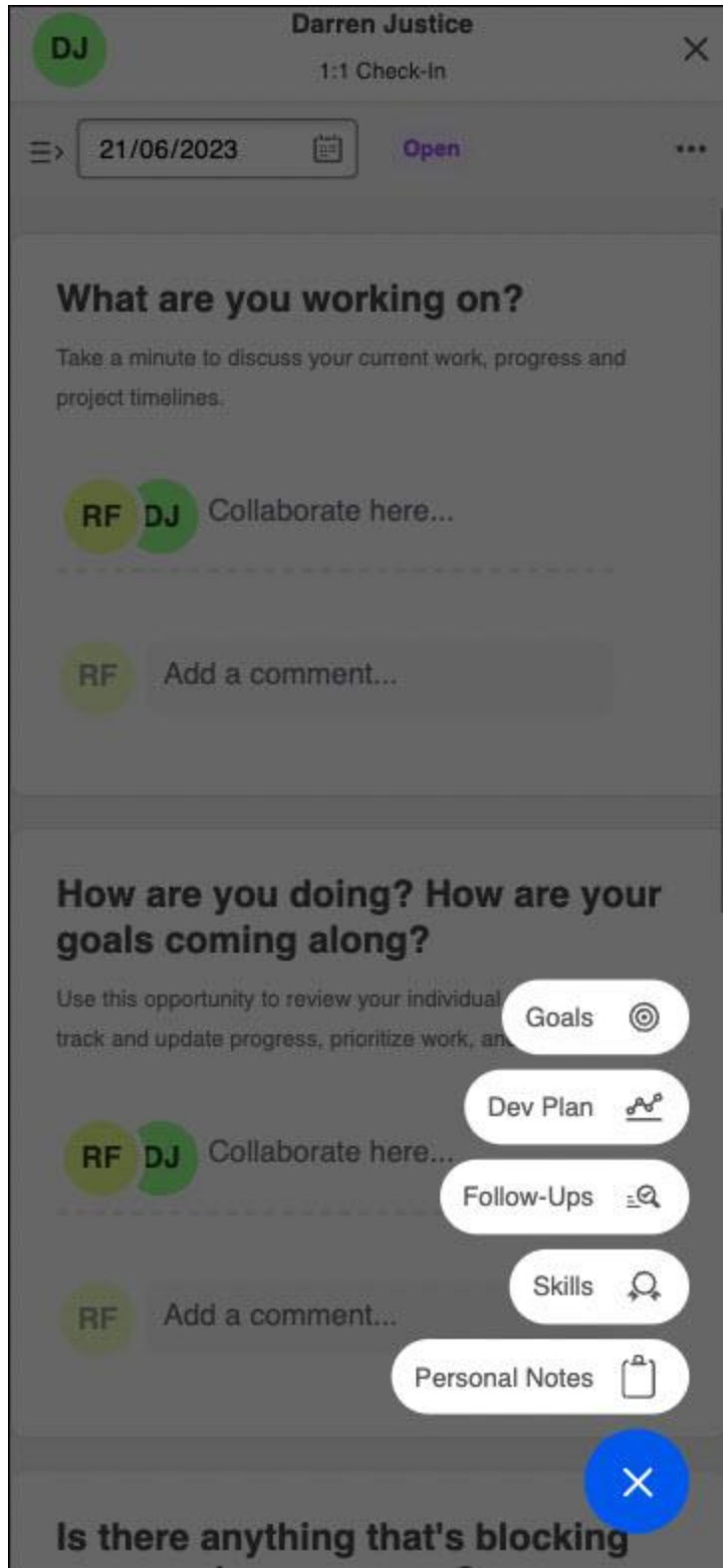
- ✓ Mark as Completed
- ✕ Cancel this meeting
- ⊕ New Meeting
- Aa Switch to topic view
- 🗑 Delete Meeting
- ⚙ Check-Ins Settings



- **Meeting view:** In topic view, users can switch to meeting view by selecting **Switch to meeting view** from the ellipsis.



- **Resources:** Users can click the Resources icon to access the appropriate resource page for Goals, Dev Plan, Follow-Ups, Skills, and Personal Notes.



## 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	<p>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 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>	Performance

# Review Task Central

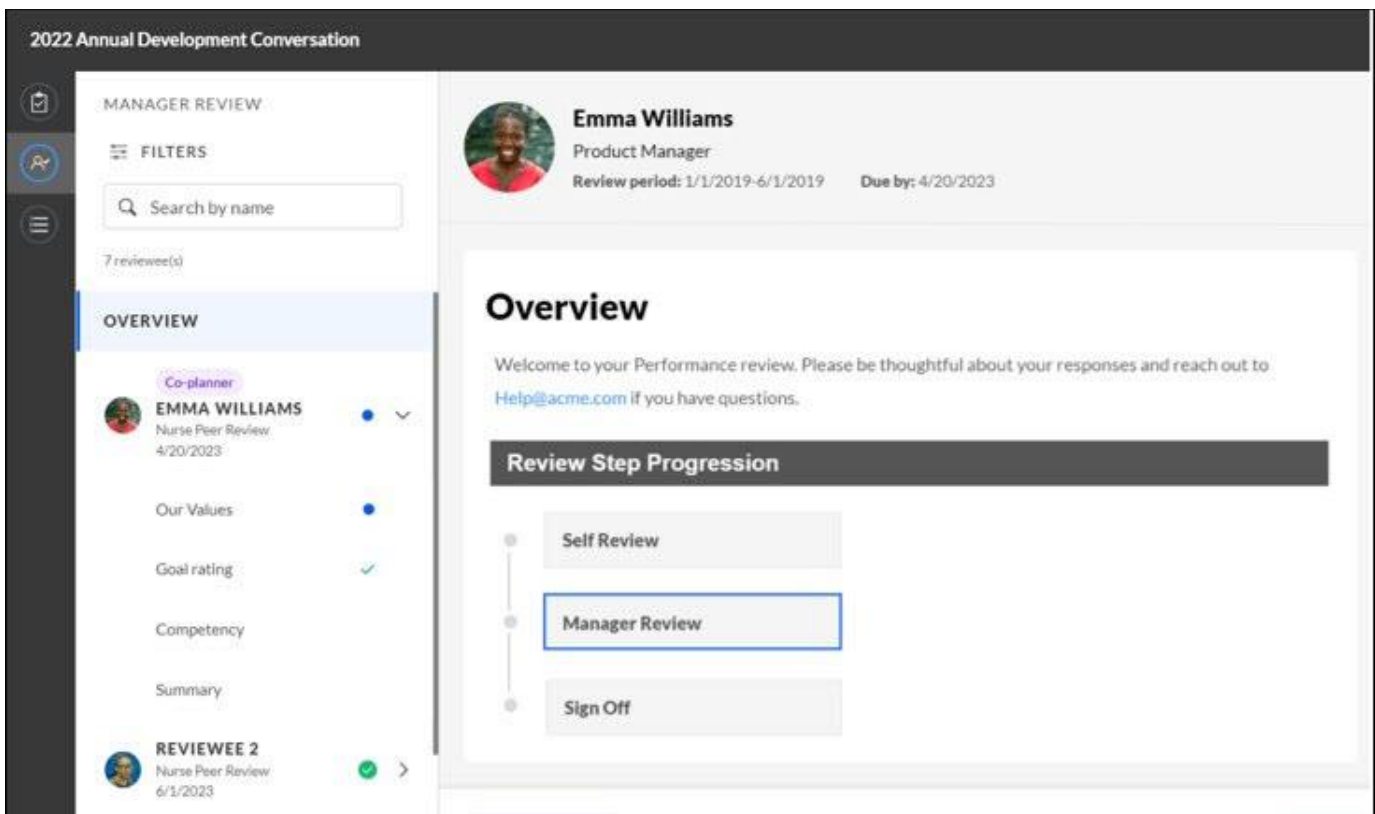


## Review Task Central - General Availability

Review Task Central provides reviewers an easy way to view and work on all their assigned performance review steps in one location. Additionally, it is easy to see which performance tasks are due and where to find them.

Once an administrator enables Review Task Central, users can:

- Use the improved user experience to enables reviewers to access and work on each step of the review in one location
- Filter review step-by-step status
- Search reviewee list by reviewee name
- View previous off-cycle tasks in a single view
- Preview sections (administrators)
- Access Check-Ins and feedback



The screenshot displays the '2022 Annual Development Conversation' interface. On the left, a sidebar shows a 'MANAGER REVIEW' section with a 'FILTERS' search bar and a list of review items for 'EMMA WILLIAMS' (Nurse Peer Review, 4/20/2023) and 'REVIEWEE 2' (Nurse Peer Review, 6/1/2023). The main content area features a profile for Emma Williams, Product Manager, with a review period from 1/1/2019 to 6/1/2019 and a due date of 4/20/2023. Below the profile is an 'Overview' section with a welcome message and a 'Review Step Progression' bar. The progression bar shows three steps: 'Self Review', 'Manager Review' (highlighted with a blue border), and 'Sign Off'.

### Activate Review Task Central

To activate Review Task Central:

1. Go to **ADMIN > TOOLS > PERFORMANCE MANAGEMENT > PERFORMANCE FEATURES SELF ACTIVATION**. The Feature Activation Preferences page opens.
2. In the Activate Task Central area, select the **Activate** button. All newly created tasks now appear in the new interface.

**Important:** Once activated, Review task Central cannot be reverted.

## Review Task Central Features

Once activated, Review Task Central provides access to:

- A reviewee view to view all personal review and any other steps in one location. [See Review Task Central - Reviewee View](#) on page 270 *for additional information*.
- A reviewer view to view current review step and any other steps assigned in one location. [See Review Task Central - Reviewer View](#) on page 268 *for additional information*.
- A bulk submit feature to submit multiple assigned review steps at one time. [See Review Task Central - Bulk Submit](#) on page 273 *for additional information*.
- A bulk reopen feature to reopen a review step for one or more reviewees at one time. [See Review Task Central - Bulk Reopen](#) on page 272 *for additional information*.
- A Skills Assessment section that allows reviewers and reviewees to view and manage skills during a performance review. [See Skills in Performance Reviews - General Availability](#) on page 280 *for additional information*.

Additionally, Review Task Central provides a new Skill Assessment type that integrates a user's skills profile into performance reviews and updates the skills profile as part of a performance review task.

**Note:** *The tasks that are available are based on permissions and enablement.*

## Review Actions Menu

Selecting **REVIEW ACTIONS MENU** opens the Review Actions menu. This menu:

- Allows users to navigate between assigned review steps.
- Highlights the step the reviewer is currently working on.
- Displays step titles that are displayed in the Performance Review Workflow.
- Displays the Bulk Actions option, if enabled.
- Consolidates links to performance reviews. If a manager has 20 direct reports, they will see only one link that opens to all 20 reviews.

## Status Changes

All performance tasks that use Task Central now show the following new statuses:

- Open: There are actionable steps to complete.
- Closed: There is no current action that can be taken on that review.

This change applies to the Universal Profile Actions, Scheduled Tasks, Action Items, and Performance Review Summary pages.

**Note:** The filters on the Performance Review Summary Page will be mapped to the new open and closed statuses.

## Due Date Changes

The following due date changes now apply:

- The due date associated with the task central link will display a consolidated due date. This applies to the due date field on the Universal Profile - Actions, Performance Review Summary, Scheduled Tasks, and Actions items pages.

- If there is an action to complete on the task, and the status is open, the due date shows the earliest due date in the step. If there is no action to complete on the task, and the status is closed, no due date appears.

The due date for the review step is also visible in the section header.

### Reviewee View

A new Review Actions Menu allows users to:

- Navigate between the review step they are currently on and any other steps they are assigned.
- Access bulk actions, if enabled.

### Reviewee Menu

Reviewees can:

- Move between reviewees or review sections.
- View when a review is completed, in progress, or past due.
- View the due date for each review.
- View all the reviews assigned for that step in the left-hand navigation bar.

### Statuses and Tags

The reviewee menu now displays three status icons:

- Completed: Green check mark icon
- Past due: Red warning sign icon
- In progress: Blue dot icon

Tags appear above reviewee names to identify when a step is re-opened or if the reviewer is serving as a co-planner for that reviewee.

### Off-cycle Tasks

The review view applies to Off-cycle tasks as follows:

- The Off-cycle task shows each occurrence of that task in the reviewer menu.
- The Off-cycle task title is visible in the reviewee header.
- Reviewees can filter by step status or off-cycle task name.
- The Off-cycle task name displays below the reviewee name.
- A reviewer will see all reviews assigned for that step in the left navigation bar.

### Buttons and Navigation

Task Central button names and navigation on the review task changed to the following:

- **SAVE FOR LATER** button: Save and exit the review.
- **NEXT** button: Save and move to the next section.
- **PREVIOUS** button: Save and move to the previous section.
- **X** in top right corner of screen: Save and exit.

When a user navigates away from a task in Task Central, that task is automatically saved.

## REVIEW.LINK email tag and Single Sign On (SSO)

If Review Task Central is enabled, the REVIEW.LINK email tag in Step Assigned and Step Due emails allows the use of an SSO deep link, if SSO is enabled in the portal.

**Note:** The REVIEW.LINK email tag only works with Task Central for step due and step assigned emails.

## Parity with Legacy Reviews

With this release, Review Task Central is at functional parity with legacy performance reviews for the following functionality available in Review Task:

- Off-Cycle Tasks - Task Central will support the Discuss and Decline review functionality.
- Task Administration: Preview: - Administrators will be able to preview tasks when task central enabled.
- Review Options Button - The following actions will now be available under the Options button within a review:
  - Discuss Review
  - Decline Review
  - View Feedback
  - View Check-Ins
  - Off-Cycle Summary
  - Complete Offline
  - Upload Reviews
  - Competency Summary
  - View Peer Selectors

## Starter Guide

[Click here to download the Review Task Central Starter Guide.](#)

## Considerations

Task Administration: - Review Summary:

- The Confirmation page is not available after Review Task Central is enabled.
- Task Central uses aggregated links to access review tasks, so the tags used in Task List Names will not render. Instead, use a generic name, such as "2022 Manager Review".

## Implementation

Customers can self-activate Review Task Central. Once activated, Review Task Central cannot be deactivated.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance. This is an administrator permission.	Performance - Administration



## Activating Review Task Central

To access Review Task Central features, an administrator with appropriate permission must activate it. Once activated, all tasks will use the Review Task Central user interface and features.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance. This is an administrator permission.	Performance - Administration

**Important:** Once activated, Review Task Central cannot be turned off.

To activate Review Task Central:

1. Go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > PERFORMANCE FEATURES SELF ACTIVATION](#). The Feature Activation Preferences page opens.
2. In the Activate Task Central area, select the **Activate** button. All newly created tasks now appear in the new interface.

**Note:** Tasks created before activation remain in the legacy format. Tasks created after activation appear with a green check-mark next to their name in the Task Administration screen.

## Review Task Central - Reviewer View

The reviewer view allows users to navigate between their current review step and any other assigned steps.

To access reviewer view, go to [PERFORMANCE > PERFORMANCE REVIEWS](#) and select the My Assigned Reviews tab. Select the appropriate link in the Title column.

The screenshot displays the '2022 Annual Performance Review - Overview' interface. On the left, a 'MANAGER STEP' sidebar lists review steps for 'AL CANARRY' (1/12/2023) and 'JOHN CATTY' (1/12/2023). The 'Overall Performance' step is selected. The main content area shows the 'Overall Performance' section with a rating of 3 and a comment: 'A good, all round ...'. A manager comment from Pat Kelly is also visible.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance. This is an administrator permission.	Performance - Administration

### Standard Tasks

The following information applies to standard tasks.

### Review Actions Menu

The Review Actions Menu lets users navigate between any review step assigned to them. The step the reviewer is currently working on is highlighted. The step titles displayed are the same step titles that display in the Performance Review Workflow.

**Note:** If enabled, a **Bulk Actions** item may appear on this list. See [Review Task Central - Bulk Reopen \(Early Adopter\)](#) or [Review Task Central - Bulk Submit \(Early Adopter\)](#).

### Navigation Panel

All reviews assigned for a step appear in the left navigation panel. Reviewees can use the left navigation panel to move between reviewees and review sections.

To access review step sections, select a reviewee name. Their available sections appear in the right panel to complete.

The navigation panel also displays the name of the option selected on the Review Actions Menu.

For each reviewee, the navigation panel provides the following information:

- Green check - The task is Completed.
- Red warning icon - The task is Past due.
- Blue dot - The task is In Progress.
- Co-planner - The reviewer is a co-planner.
- Reopened - The step is reopened
- Due date - The due date for each reviewee's review.

### **Filter**

Use the following filters to filter the reviewee list by step status:

- All
- In Progress
- Past Due
- Not Started
- Completed

### **Search**

Use the **Search by Name** field to locate reviewees by name.

### **Off-Cycle Task**

The reviewee view for an off-cycle task displays each occurrence of the off-cycle task in the left navigation menu and the header.

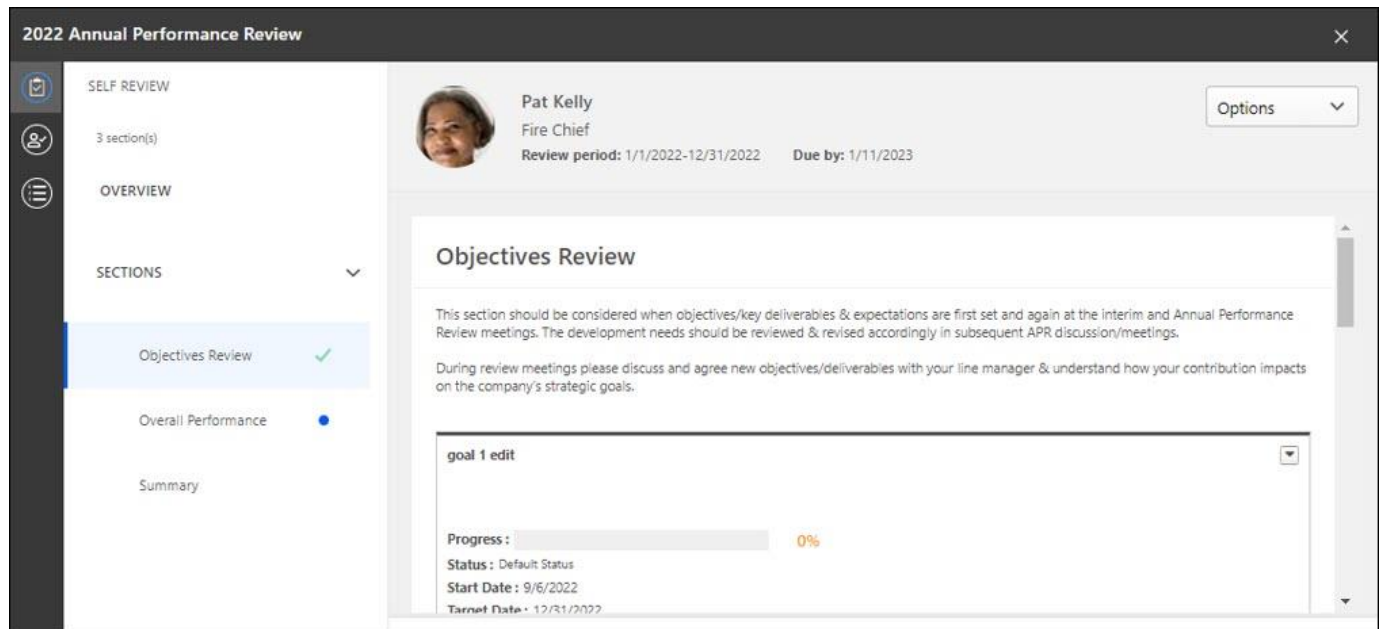
Reviewees can filter by step status or off-cycle task name.



## Review Task Central - Reviewee View

The reviewee view allows users to navigate between their personal review and any other steps assigned via the Review Actions menu.

To manage your review, select a link in the left navigation panel and complete the details in the right panel.



The screenshot shows the '2022 Annual Performance Review' interface for Pat Kelly, Fire Chief. The review period is 1/1/2022-12/31/2022, and the due date is 1/11/2023. The left navigation panel includes 'SELF REVIEW' (3 section(s)), 'OVERVIEW', and 'SECTIONS'. Under 'SECTIONS', 'Objectives Review' is marked as completed with a green checkmark, while 'Overall Performance' and 'Summary' are not. The main content area is titled 'Objectives Review' and contains instructions: 'This section should be considered when objectives/key deliverables & expectations are first set and again at the interim and Annual Performance Review meetings. The development needs should be reviewed & revised accordingly in subsequent APR discussion/meetings. During review meetings please discuss and agree new objectives/deliverables with your line manager & understand how your contribution impacts on the company's strategic goals.' Below this is a 'goal 1 edit' field with a dropdown arrow. A progress bar shows 0% completion. The status is 'Default Status', the start date is 9/6/2022, and the target date is 12/31/2022.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance. This is an administrator permission.	Performance - Administration

### Standard Task

The following information applies to standard tasks.

#### Navigation Panel

The reviewee's review and any other assigned steps appear in the navigation panel. Selecting an item in the navigation panel displays its details in the right panel.

When a section of the review is completed, a green check appears next to the section title.

For convenience, the due date for the review step appears in the **Due by** field.

#### Off-Cycle Task

The left navigation panel for an off-cycle task shows each occurrence of the off-cycle task and the task title.

Reviewees can filter by step status or off-cycle task name.

## Buttons

- **Save for later** - Option to save and exit the review
- **Next** - Saves the review and moves to the next section
- **Previous** - Saves the review and moves to the previous section

## Review Task Central - Bulk Reopen

Use the Task Central Bulk Reopen page to reopen a review step for one or more reviewees at the same time and provide a reason for reopening the step.

**Note:** Only one step can be opened at a time. Comments about why someone is reopening are visible in Review Task Central.

Bulk reopen supports up to 1,000 users per bulk reopen action.

**Note:** To use this functionality, Review Task Central must be activated. See [Activating Review Task Central](#) on page 267 for additional information.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance. This is an administrator permission.	Performance - Administration

### Enabling Bulk Reopen

To enable bulk reopen:

1. Go to PERFORMANCE MANAGEMENT > TASK ADMINISTRATION.
2. Select the Review Workflow tab for the appropriate review.
3. In the Review Step section, check **Allow the Reopener (Manager, Indirect Manager, and any Custom Relationships to reopen steps)** to allow bulk actions to appear in Review Task Central.

### Submitting Bulk Reopen

To bulk reopen steps:

1. In the Reviewer view, from the Review Actions menu, select the bulk action icon. The Bulk Actions page opens to display all bulk actions available to the reviewer.
2. Select the Reopen tab.
3. Select a step or search for a step and select it.
4. Click the check-boxes for one or more users.
5. Click the **REOPEN STEPS** button. A Reopen Step window opens.
6. In the Comment for Reviewer box, enter the reason for reopening this step.
7. Click the **REOPEN STEP** button. The reopen information is displayed in the reopen table, including the comment.

Once processing is done, a success message, a partial success message, or a failed message appears.

- If successful, the step is reopened and the comment is displayed on Task Central to the appropriate assignees.
- If the bulk reopen was not successful, you are returned to the bulk submit page to correct any errors and try again.

**Note:** During bulk action processing, the reviewer cannot navigate away from the Bulk Actions page.

**Note:** Bulk reopen is enabled per step and cannot be enabled or disabled once a task is started.

## Review Task Central - Bulk Submit

Use the Task Central Bulk Submit page to submit multiple assigned review steps at one time. To use the bulk submit functionality, an administrator must enable bulk submit for the specific review step.

Bulk submit supports up to 1,000 users per bulk submit action.

**Note:** To use this functionality, Review Task Central must be activated. See [Activating Review Task Central](#) on page 267 for additional information.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Performance. This is an administrator permission.	Performance - Administration

### Enabling Bulk Submit

To enable bulk submit:

1. Go to PERFORMANCE MANAGEMENT > TASK ADMINISTRATION.
2. Select the Review Workflow tab for the appropriate review.
3. In the Define Review Step section, check **Enable Bulk Submit for this Review Step** to allow bulk actions to appear in Review Task Central.

### Submitting Bulk Review Steps

To submit bulk review steps:

1. In the reviewer view, in the Review Actions menu, select the bulk action icon. The Bulk Actions page opens to display all bulk actions available to the reviewer.
2. Click the Submit tab to view all available reviews.
3. Select a review step. This enables the selection check-boxes.
4. Click one or more reviews to submit.
5. Click **SUBMIT REVIEWS**. A processing message appears

Once processing is done, a success message, a partial success message, or a failed message appears. If the bulk submit was not successful, you are returned to the bulk submit page to correct any errors and try again.

**Note:** During bulk action processing, the reviewer cannot navigate away from the Bulk Actions page.

**Note:** Bulk submit is enabled per step and cannot be enabled or disabled once a task is started.

**Note:** Overall Step Rating only shows in the bulk submit table if an administrator enables the **For In Progress steps, commit Section and Step Scores to Reporting on Save by reviewers** option in task administration.

## Review Task Central - Accessing Review Tasks

Use the Performance Review page to access all the review steps you need to complete for a review task.

To access review tasks, go to [PERFORMANCE > PERFORMANCE REVIEWS](#) and select a performance review summary task.



### Performance Reviews - Mike Ables

Performance Reviews

[My Assigned Reviews](#) [My Personal Reviews](#)

Title:  [Search](#)

Status:  Not Started  In Progress  Completed  Incomplete  Expired

Title	Description	Status
 Complete 2022 Self Review	2022 Annual Performance Review	Not Started
 Complete 2022 Manager Review	2022 Annual Performance Review	Not Started

## Bulk Reopen of Performance Review Task Steps by Admin

Prior to this enhancement, an administrator was only able to reopen a review step for one reviewee at a time and comments about why someone is reopening are only visible in the step reopened email.

With this enhancement, an administrator can reopen a review step for one or more reviewees at the same time, provide a reason for reopening the step, and the reopened step assignee can view the updated due date for the reopened step. Additionally, comments about why someone is reopening are visible in Review Task Central.

**Note:** *Only one step can be opened at a time.*

This enhancement is available for all customer portals where Task Central is activated. [See Activating Review Task Central](#) on page 267 *for additional information.*

### Manage Bulk Reopen Tasks

To manage Bulk Reopen tasks:

1. Go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > TASKS](#).
2. Select a task and in the Options column, select the ellipsis, and then select Bulk Reopen. The Bulk Reopen page opens.
3. Select a step or search for a step and select it.
4. Click the check-boxes for one or more users.
5. Click the **REOPEN STEP** button. A Reopen Step window opens.
6. In the **Comments** box, enter the reason for reopening this step.
7. Click the **REOPEN STEP** button. The reopen information is displayed in the Bulk Reopen table, including the comment and reopened due date.

**Note:** *During processing, administrators cannot navigate away from the page.*

Once processing is done, a success message, a partial success message, or a failed message appears. If unsuccessful, make the appropriate changes and try processing again.

If successful, the step is reopened and the comment and updated date is displayed on Task Central to the appropriate assignees.

### How Does this Enhancement Benefit My Organization?

- Administrators can reopen a review step for multiple reviewees at once, which saves time during the busy review season.
- Assignees can view the reopen reason and the updated due date directly on the Task Central page to quickly rectify the issue.

### Considerations

- Bulk reopen functionality is only available to customers who enable Task Central.
- Bulk reopen supports 1,000 users per bulk reopen action.

### Implementation

This functionality is available by default if Review Task Central is enabled.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission 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
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 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 - Administration

# Display Goal Assignment Details

Prior to this enhancement, the goal assignment and sharing criteria used to assign a goal to a user were not available. Additionally, there was no information available about status changes when users are removed or re-added to an associated review task.

With this enhancement, goal assignment details now appear in the goals Modification History.

To view the modification history for a goal, go to [PERFORMANCE > GOALS](#). From the Options drop-down, select **View History**.

## Viewing Goal Details

Users can view assignment details, sharing details, and status changes for a specific goal.

**Assignment** - Users can see the criteria used to assign a goal to them.

The 'Assignment' panel shows options for assigning a goal. Under 'Options', 'Dynamic Assignment' is selected. The 'Criteria' table lists 'All users in Position: Fire Chief (Fire Chief)' with 'Include Subordinates' checked.

Name	Action	Updated By	Type	Date
▼ Dynamically assigned goal	created by	Demo Admin	Goals	5/15/2023 5:12 AM

**Action** | **Details**  
Assigned as the user is part of criteria | Position: Fireman (Subordinate of Fire Chief)

**Sharing** - Users can view the criteria used for sharing a goal with them.

The 'Assignment' panel shows 'Managed By' as 'Demo Admin'. The 'Criteria' table lists 'Bear, Smokey (sbear)' with 'Include Subordinates' checked.

Name	Action	Updated By	Type	Date
▼ Shared goal	created by	Demo Admin	Goals	5/15/2023 1:04 PM

**Action** | **Details**  
Shared as the user is part of criteria | User: Chief Overman (Subordinate of Smokey Bear)



**Status Changes** - Users can view the status changes for goals created via review tasks and when a user is removed or re-added.

**History** ✕

	Name	Action	Updated By	Type	Date
	Demo Goal	set to in review as user is readded to review task	Cornerstone Admin	Goals	5/15/2023 6:24 AM
	Demo Goal	set to draft as user is removed from review task	Cornerstone Admin	Goals	5/15/2023 6:23 AM
	Demo Goal	created via review task	Pat Kelly	Goals	5/15/2023 1:21 PM
	Demo Goal	created by	Pat Kelly	Goals	5/15/2023 1:21 PM

Include Initiatives and Targets
 Close

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Employee Goals - Align	When creating a goal for users other than self or subordinates, this permission allows users to search for goals by user when aligning the goal with another user's goal. Users with this permission can only search for and align their goals with users who are within their permission constraints. If a user does not have this permission, then the <b>Search</b> field is not available within the Alignment pop-up. This permission works in conjunction with the Create Employee Goals permission. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Performance - Administration
Goals - Create	Grants ability for user to create goals for self, direct reports, and indirect reports only. Any constraint on this permission is operating as an "AND" function. This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

<p>Snapshot Goals - View</p>	<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>	<p>Universal Profile</p>
<p>Snapshot Goals - Manage</p>	<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>	<p>Universal Profile</p>

## Skills in Performance Reviews - General Availability

Prior to this enhancement, during a performance review, managers nor employees had access to the employee's skills or skills to develop to facilitate a productive development conversation.

With this enhancement, a new Skills Review section is added to Performance Reviews. In the Skills Review section, users can:

- Update the employee's skills profile
- View and launch content that is tied to a skill
- Rate skill proficiency
- Add custom questions to the new Skill Assessment section

**Note:** *Review Task Central must be enabled to use Skill Assessment. See [Activating Review Task Central](#) on page 267 for additional information.*

Administrators can enable the skills assessment feature by going to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > FORM SECTIONS](#). The process is as follows:

1. Click the **Create Review Section** link.
2. From the **Type** drop-down, select **Skills Assessment**. A **QUESTIONS** button and a **ADD SKILL COMPONENTS** button appear.
  - Click the **QUESTIONS** button to add custom questions. Custom questions can be marked as required. Previous responses to Skill Assessment section custom questions are visible in the review.
  - Click the **ADD SKILL COMPONENTS** button to add skill components from the user's Universal Profile.

Administrators can add custom text or rating scale questions to a skills section and determine what order to organize the Skills Components and Custom Questions.

Once enabled, the Skills Assessment section can be assigned to Self, Manager, a Custom Relationship, or Peer. Additionally:

- Reviewees can provide context for skills development over the review period, update their declared skills and proficiencies, identify areas of interest for further growth, and explore related learning.
- Reviewers can view a reviewee's skills profile, rate their proficiency, provide context or comments around skill development, and explore related learning.

Skills and proficiency updates made in the skills review automatically update in the user's skills profile.

## How Does this Enhancement Benefit My Organization?

With this enhancement, during performance reviews:

- Managers can easily access to the employee's skills to discuss skill development during performance reviews.
- Employees can take a proactive role in the career development conversation.

## Considerations

- Task Central must be activated to view the Skills Assessment section.
- It is not possible to report on the source of skills additions or updates, for example, Skills Profile, Performance Review, Check-In.

- Previous responses to Skill Assessment section custom questions are not visible in the review, so if the same section version is used in multiple reviews, users won't see the responses of the questions from an older review.
- The Skills Assessment section will not appear in the .pdf printout of the review.
- Permissions applied to the portal also apply to the Skills components in the review.

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Form Sections - Manage	Grants ability to create and manage performance review questions and sections which are used in performance review tasks. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

# Recruiting

## Application Custom Fields in Recruiting Emails

Prior to this enhancement, recruiters manually generate emails containing valuable information about candidates. This process was very time consuming and error-prone.

With this enhancement, recruiters can now add a tag to application custom fields and insert application custom field tag into email templates. Application custom field tags automate the process of sharing application information to reduce the recruiter's workload and ensures that the shared data is standardized and reliable.

The process is as follows:

1. Create an application custom field: Go to [ADMIN > TOOLS > CORE FUNCTIONS > CUSTOM FIELD ADMINISTRATION](#).
2. Define tags: Go to [ADMIN > TOOLS > RECRUIT > REQUISITION AND APPLICANT PREFERENCES](#). Add the field, then click Edit to create a tag.
3. Include the tag in an email trigger: Go to [ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT](#). Edit the needed triggers. All email tags are available in the drop-down.

### Email triggers

The following email triggers support application custom fields:

Applicant Form Complete	Interview Scheduling Notification – Interviewer(s)
Applicant Status Change	Interview Scheduling response
Assign Applicant Assessment	Invitation to Interview Event (Applicant Self Schedule)
Assign Applicant Form	New Applicant comment posted
Assign Integration Assessment	Offer Approval Decision
Candidate hired	Offer Pending Approval
Candidate Offer Response Received	OnDemand Video Interview Assigned
Disposition	OnDemand Video Interview Completed
Email Offer to Candidate	Reference Letter Form Complete
HireRight Background Check Assigned	Reference Letter Request (to external references)
HireRight Background Check Completed	Request References
Integration Assessment Completed	Review Applicant

Interview Cancelled Notification	Send Offer to Candidate Profile
Interview Recommendation Nudge	SHL Assessment Assigned
Interview Recommendation Pending	SHL Assessment Completed
Interview Recommendation Recorded	Voluntary withdrawal
Interview Scheduling Notification – Applicant	

## Blank Values and Translations

The following information defines behavior for blank values and translations:

CUSTOM FIELD TYPE	VALUE IN EMAIL IF BLANK OR NEVER EDITED	SUPPORTS LOCALIZATION
Checkbox	Unchecked will display <b>No</b>	Default localization (Yes/No)
Date field	Shows blank	No
Dropdown with Select	Shows blank if value is <b>Select</b>	Values can be localized
Dropdown with default value	Shows default value if unchanged	Values can be localized
Multiple checkbox without default	Shows blank	Values can be localized
Multiple checkbox with default	Shows default value(s) if unchanged	Values can be localized
Numeric field	Shows blank	No
Radio button	Shows default value if unchanged	Values can be localized
Scrolling text box	Shows blank	No
Short text box	Shows blank	No

## 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
-----------------	------------------------	----------



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
Email Preferences - Manage	Grants ability to manage Email Preferences, which includes defining end users' ability to change their email address and the associated email notifications when emails are changed. This is an administrator permission.	Core Administration
Emails by Learning Object - Manage	Grants access to create, edit and delete custom email templates/triggers at the learning object level. When viewing Course Console, this permission also grants ability to view and manage email triggers at the LO level. This permission works in conjunction with the Course Catalog - Update and Course Catalog - View permissions. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. This is an administrator permission.	Learning - Administration
Emails by Learning Object - View	Grants access to view custom email triggers at the learning object level. When viewing Course Console, this permission also grants ability to view email triggers at the LO level. This permission works in conjunction with the Course Catalog - Update and Course Catalog - View permissions. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. 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
Requisition Preferences - Manage	Grants ability to access and manage Requisition and Applicant Preferences. This permission cannot be constrained.	Recruiting Administration

**Note:** Users with the Requisition: Manage permission will not be affected by **Field Level Access settings**.

## Candidate Skills Match (Open Beta)

Prior to this release when vetting candidates, recruiters manually reviewed resumes to identify potential candidates for a position. This process can be time-consuming and frustrating.

With this release, on the Manage Candidates page, a new "Candidate Score" field is provided. The candidate skills match score is calculated by matching a candidate's profile against the requisition's job description. Additionally, recruiters can also check for missing and matching skills.

To enable this feature, administrators can go to [ADMIN > RECRUIT > FEATURE ACTIVATION](#) and select Candidate Skills Match.

Once enabled, an administrator **must** configure location Organizational Units (OUs) where matching is required by going to [ADMIN > RECRUIT > COMPLIANCE ENABLEMENT](#) and checking the **Enable Candidate Skills Match** option under the Applicants section.

To access the Manage Candidates page, go to [HOME > RECRUIT > MANAGE CANDIDATES](#).

If enabled, matching begins when a candidate submits an application with a resume attached in .doc, .docx, or .pdf format. Scoring is based on the candidate's resume /work experience matched against the job description. Scores appear in the Candidate Score column as follows:

- 76 to 100 – Excellent
- 51 to 75 – Good
- 26 to 50 – Fair
- 0 to 25 - Low

**Note:** *If the resume is not attached to the application, the score is blank. For better scoring, it is recommended that parsing for previous work experiences is enabled. See [Application Workflow - Upload Attachments](#).*

CANDIDATE	STATUS	TYPE	SOURCE	CANDIDATE SCORE
<input type="checkbox"/> <b>abcd 1</b> Internal <a href="#">abcd@1.com</a>	New Submissions 1 day ago <input type="button" value="Review Candidate"/>	Internal	Sam's Source 2/23/2023	90 - Excellent
<input type="checkbox"/> <b>Fiona Abraham</b> 678 993-2309 <a href="#">mfhunter@csod.com</a>	New Submissions 1 day ago <input type="button" value="Review Candidate"/>	External	AIESEC 2/23/2023	75 - Good
<input type="checkbox"/> <b>karan Mahadik</b> 123456788 <a href="#">kmahadik@csod.com</a>	New Submissions 1 day ago <input type="button" value="Review Candidate"/>	External	Mann Co. Career 2/22/2023	20 - Poor
<input type="checkbox"/> <b>Karan Mahadik</b> 12234566789 <a href="#">karanesting1801@gmail.com</a>	New Submissions 1 day ago <input type="button" value="Review Candidate"/>	External	Arzne Corporate 2/22/2023	10 - Bad

Recruiters can click on and score to open Skills Matching Summary flyout. The flyout displays the following additional details:

- Skills Relevance – Predicts how well the candidate's skill match the position.
- Experience Relevance – Predicts whether the candidate's experience matches the position.
- Upward Opportunity - Predicts how well the current position matches the candidates career path.
- Is the matching score relevant? question - Recruiters can submit feedback about whether the scores calculated were appropriate or needed fine tuning. Feedback goes to Beta Community [Thread for Feedback and Questions](#) page. Only one feedback can be submitted per application.
- Matching skills - Displays the candidate's skills that match the position.
- Missing skills - Displays the candidate's missing skills for the position.

Skills Matching Summary
✕

## John Smith

Applied for Position

Software Engineering Manager

Candidate Matching Score

56 - Good

Skills Relevance

● Positive

Upward Opportunity

● Negative

Experience Relevance

● Neutral

Is the matching score relevant? Yes No

Matching Skills

software\_engineering

technology

c\_programming

javascript

sql\_programming

scrum\_development

agile\_development

Missing Skills

software\_development

java\_programming

computer\_programming

angular

react\_js

python\_programming

jira

project\_management

svn

git

research

computer\_science

team\_management

azure

mongodb

devops

postgresql

system\_analysis

nosql

front\_end

versioning

digital\_technology

rds

redis

rabbitmq

## How Does this Enhancement Benefit My Organization?

Recruiters can quickly identify top talent by reviewing the skills matching score.

## Considerations

- Matching is done only for locations where candidate skills match is enabled under [ADMIN > RECRUIT > COMPLIANCE ENABLEMENT](#).
- With this release skills matching is only supported for External Career Site, Internal Career Site, Add/Move to Requisition, and Snapshot workflows.
- On the Skills Matching Summary flyout, information in the Matching Skills and Missing Skills fields will be displayed as keys and might not be translated to logged in user's language.
- For Open Beta, if previous experience parsing is not enabled or empty, Upward Opportunity and Experience Relevance will be Negative and Neutral.

## Implementation

- This functionality is disabled by default. To enable, go to [ADMIN > RECRUIT > FEATURE ACTIVATION](#) and select **Candidate Skills Match**.
- This functionality is only available in Stage environments.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
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: 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	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	Recruiting

requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained.

**Note:** This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** permission overrule those of the **Requisition: Owner** permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants - View Candidate Matching Score	Grants ability to view a candidate's Matching Score on the Manage Candidates page. This permission is not constrained.	Recruiting

# Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '23 Release

**Update:** The Data Load Wizard (DLW) Requisition Template load will not be deprecated with November '23 release. The Requisition Template Status load will be available in Edge Import before deprecating the DLW Requisition Template load.

The ability to perform Requisition Template data loads using DLW will be deprecated with the November '23 Release. Support for DLW Requisition Template loads, along with the full deprecation will occur with the November '23 Release. Customers are encouraged to begin using Edge Import for their Requisition Template loads prior to the deprecation.

Data Load Wizard is a legacy data load tool, built on older technology, with limited load type support, a dated user interface (UI), and slow performance. 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 (EI) offers manual loads and automated scheduled feed abilities.

## Deprecation Milestones

### Phase 1 - August '22 Release:

- Introduce Requisition Template Edge Import Load.
- Support for translation loads.
- Support all existing fields in EI as supported in DLW.
- Allow update of Requisition Template through EI even if the template is edited from UI.

### Phase 2 – March '23 Release:

- Support updates to templates based on Requisition Template ID along with Requisition Template Reference ID.
- Allow update to templates from EI for templates created from UI.

### Phase 3 – July '23 Release:

• Support Feeds for Requisition Template load in Edge Import

### Phase 4 – November '23 Release:

• Stop support and remove all remaining access to DLW Requisition Template loads.

See [Edge Import Fundamentals - System Administrator Training](#) for more information.



## Display Candidate Documents on Universal Profile

With this enhancement, once a candidate is hired, documents uploaded to a candidate's profile by a recruiter, or documents uploaded to the application by the candidate, are automatically transferred the new hire's Universal Profile Snapshot Document tab.

Documents only display if the candidate's application is in Hired status.

The following document types can now be configured for automatic display on the Universal Profile:

- Cover letter
- Flattened application
- Additional application documents uploaded by the candidate during the application
- Documents added to the candidate's profile by a recruiter

Summary Statuses Application Comments **Documents** History Email

### Applicant Documents

Review or upload a Resume/CV, a Cover Letter and up to ten (10) Other Documents for this applicant. It may take several minutes for new attachments to be included in the Application PDF.

Document	Title	Upload User	Upload Date	Options
Resume/CV	Upload Resume/CV			
Cover Letter	Upload Cover Letter			
Other Document	Upload Other Document			

### Attachments

+ Add Attachment

Applicant Status	Title	Upload User	Upload Date	Options
New Submission	Flattened Application - 13253	Compliance 3 NMW [nmwcomp3@csod.com]	5/22/2023	

- All uploaded documents are marked as uploaded by Cornerstone Admin.
- A user with appropriate permissions and the Owner role, can delete documents from the Universal Profile folders. The deleted document remains in Recruiting on the candidate's My Jobs page or the applicant's profile page.

An administrator must configure the document folders that display on the Universal Profile. To configure the document folders, go to [ADMIN > TOOLS > RECRUIT > GENERAL PREFERENCES](#). *See General Preferences (by Division)*.

## How Does this Enhancement Benefit My Organization?

It is now easier to view a hired candidate's application documents on their Universal Profile without returning to the career site.

## Considerations

- Reference letters are not included in this release.

- If a document is accidentally deleted from a folder, contact GCS to restore it to the folder.

## 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
Documents - Delete	Enables user to delete a file that has been uploaded to the Snapshot - Documents page. The constraints on this permission determine which documents the user can delete. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, Self and Direct Reports, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.	Universal Profile
Snapshot Documents - View	Grants ability to view the Documents widget and subpage within the Universal Profile - Snapshot page. This permission can be constrained by Employee Relationship, OU, User's OU, User's Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. This is an end user permission.	Universal Profile
Snapshot Main - View	Enables user to view the Snapshot page for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. <b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.	Universal Profile

## Display Org Units to Approvers of Requisition Requests

With this enhancement, requisition request Division and Location information is now visible on the Hiring Dashboard and the Universal Profile Actions/Requests page. This allows approvers to immediately see if they need to take action on a requisition request.

# Hiring Dashboard

**2**  
Active Applicants

- 0 In Review
- 2 Interview
- 0 Background Check
- 0 Other Statuses
- 0 Offer Letter

[Requisition Details Report](#)

**0**  
NEW SUBMISSIONS



## 10 APPROVALS

[Show All](#)

	<b>NMW Product Manager</b> Date Submitted : 5/9/2023 Requested By : Cornerstone Admin Status : Pending Division : International Business Development and New Market Acquisition (NMW) Location : Saint-Remy-en-Bouzemont en Champagne (nmw)	
	<b>NMW Product Manager</b> Date Submitted : 5/9/2023 Requested By : Cornerstone Admin Status : Pending Division : International Business Development and New Market Acquisition (NMW) Location : Saint-Remy-en-Bouzemont en Champagne (nmw)	
	<b>NMW Product Manager</b> Date Submitted : 5/9/2023 Requested By : Cornerstone Admin Status : Pending Division : Location :	
	<b>NMW Product Manager</b> Date Submitted : 5/9/2023 Requested By : Cornerstone Admin Status : Pending Division : NMW Implementation Location :	

# Universal Profile Actions/Requests

Actions
View Team 
...

Actions
Requests

Show All

By Date Submitted

Pending

Search

Start Date

End Date

Search

Submitted More Than A Month Ago

**NMW Product Manager**

Date Submitted : 5/9/2023 Requested By : Cornerstone Admin

Status : Pending Division : International Business Development and New Market Acquisition (NMW) Location : Saint-Remy-en-Bouzemont en Champagne (nmw)

Q

**NMW Product Manager**

Date Submitted : 5/9/2023 Requested By : Cornerstone Admin

Status : Pending Division : International Business Development and New Market Acquisition (NMW) Location : Saint-Remy-en-Bouzemont en Champagne (nmw)

Q

**NMW Product Manager**

Date Submitted : 5/9/2023 Requested By : Cornerstone Admin

Status : Pending Division : Location :

Q

**NMW Product Manager**

Date Submitted : 5/9/2023 Requested By : Cornerstone Admin

Status : Pending Division : NMW Implementation Location :

Q

## Considerations

- If the Division or the Location is not provided in the requisition request, the value is left blank.
- This enhancement only applies to requisition requests.

## Implementation

- This functionality is automatically enabled for all organizations using the Recruiting module.
- This feature cannot be disabled.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Hiring Dashboard: Manage	Grants the ability to access the Hiring Dashboard. Access to the Hiring Dashboard is dynamically assigned when the user is a Requisition Owner or Applicant Reviewer (including Hiring Manager).	Recruiting

	<p>This permission is only assigned to the Hiring Manager/Applicant Reviewer when there is a qualified candidate for the requisition. A qualified candidate is any candidate that is past the New Submission stage. Until that point, the Hiring Dashboard will not be visible to recruiters who are dynamically assigned this permission who do not already have access to the Hiring Dashboard through another requisition.</p>	
Hiring Dashboard: View Other Dashboards	<p>Grants the ability to view other users' dashboards. While viewing another user's dashboard, no actions can be taken on behalf of the dashboard owner. User also needs access to their own Hiring Dashboard before accessing other dashboards using this permission. This permission can be constrained by OU, User's OU, User, and User's Subordinates.</p>	Recruiting
Requisition Details Report	<p>Grants access to the Requisition Details report, which displays details of requisitions in the portal. This permission cannot be constrained.</p>	Reports - Recruiting
Requisition: Owner	<p>Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained.</p> <p><i><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.</i></p>	Recruiting
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p>	Recruiting

	<p><b>Note:</b> This is a dynamically assigned permission that is not available in Security Role Administration. Once a requisition is in a Closed or Cancelled status or if the user is removed as a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned.</p> <p><b>Note:</b> If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the <b>Requisition: Reviewer</b> permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the <b>Requisition: Reviewer</b> permission. See <a href="#">Applicant Profile Page Overview</a> for more information about duplicate reviewer instances.</p>	
Action Items - EPM	Grants ability to view and take action upon Performance (EPM) items on the Action Items page and in the Your Action Items widget. This permission can be constrained by OU, User's OU, User's Self, and User's Self and Subordinates. This is an end user permission.	Universal Profile
Action Items - View	Grants ability to view action items on the Action Items page and in the Your Action Items widget. Users without this permission cannot access the Action Items page. This permission can be constrained by Employee Relationship, OU, User's OU, User's Self and Subordinates, and User's Self. This is an end user permission.	Universal Profile
Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile
Requisition: Approver	Enables approver to access and approve/deny requisitions for which they are an approver. This permission cannot be constrained. <b>Note:</b> This is a dynamically assigned permission. If the user is removed as an approver for an offer that is in a Pending Offer status, the user can no longer access that version of the offer. This permission cannot be manually assigned.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This	Recruiting

permission can be constrained by OU, User's OU, and Grade.

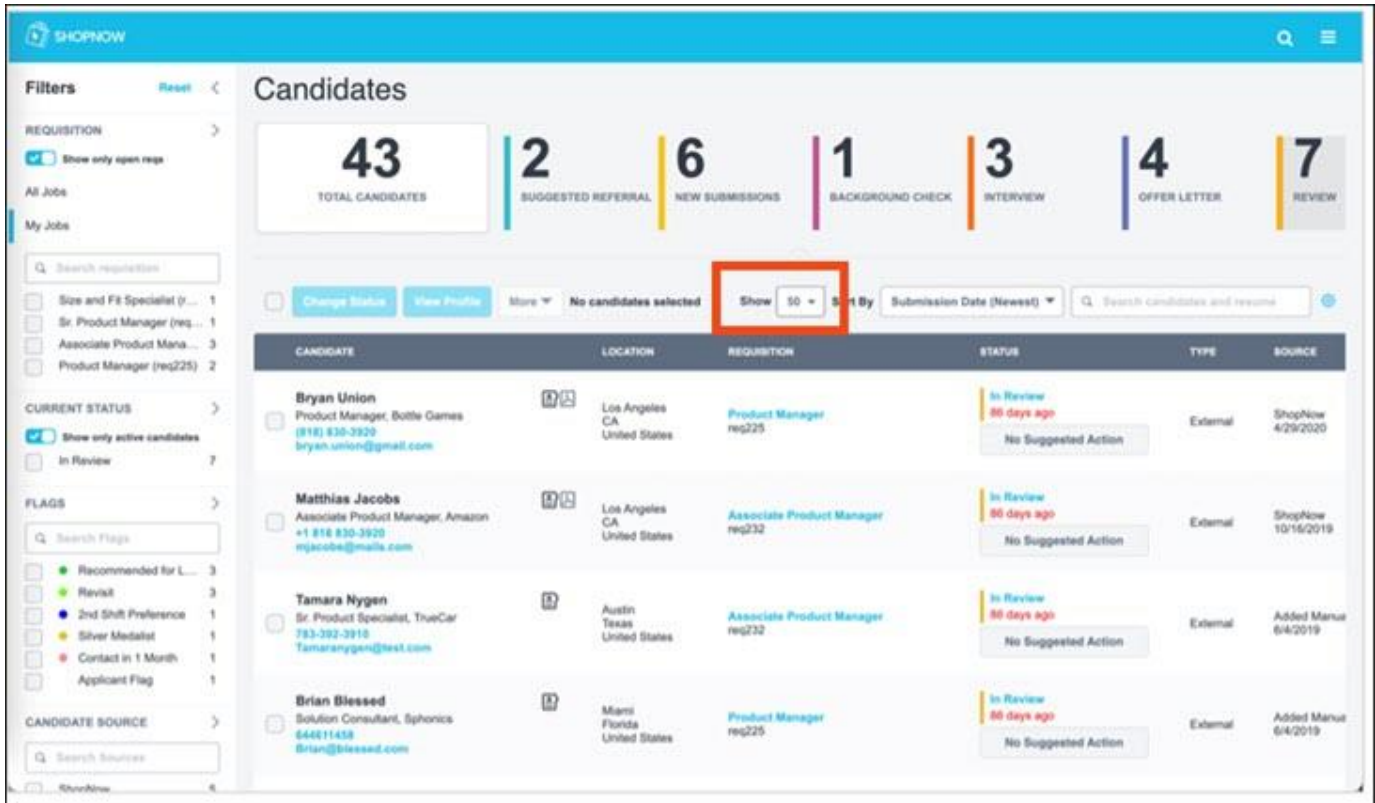


# Extend Bulk Selection on Manage Candidates Page - General Availability

Prior to this enhancement, on the Candidates page, recruiters who wanted to perform actions for a group of candidates were limited to 20 candidates at a time.

With this enhancement, recruiters can select and perform actions for 20 or 50 candidates per page.

To access the Candidates page, go to [RECRUIT > MANAGE CANDIDATES](#).



## 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
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: Comments - Manage	<p>Grants ability to view and manage comments for applicants.</p> <p>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.</p> <p><b>Note:</b> 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.</p>	Recruiting
Applicants: Comments - View	Grants ability to view comments for applicants.	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

## Google is Deprecating Standard Universal Analytics on July 1, 2023

Google is deprecating standard Universal Analytics on July 1, 2023. A Knowledge Article has been created with guidelines to understand how to migrate from Google Universal Analytics to Google Analytics 4 using the Google Tag Manager.

See [How to migrate \(or enable\) from Google Universal Analytics to Google Analytics 4](#) for more information.

## Manage Applicants Deprecation with Q1 2024 Release

The Manage Applicants deprecation ensures all users benefit by using Manage Candidates enhanced, mobile-friendly user experience to quickly and effectively assess and manage all their candidates through the hiring process.

Prior to deprecating the Manage Applicants user interface (UI) in Q1 2024, Cornerstone will bring the most commonly used workflows to Manage Candidates to reduce complexity, making the Manage Candidates page simpler to use.

With the Manage Applicants deprecation, Manage Candidates becomes the single source to assess and manage all candidates.

The following paths will be redirected from Manage Applicants to Manage Candidates:

- Recruit > Manage Requisitions > Applicants, Referrals and New Submissions link
- Recruit > Review Applicants > Applicants and In Review link
- Recruit > Hiring Dashboard > New Submissions, In Review, Interview, Background Check, Other Statuses, Offer Letter and Active Applicants links
- Recruit > Recruiting Dashboard > Recent Referrals link

# Manage Candidates Add/Move to Requisition Email Trigger Update

Prior to this enhancement, when adding or moving a candidate from the Manage Candidates page, the Application Confirmation email was unnecessarily triggered.

With this enhancement, when adding or moving a candidate to a new requisition from the Manage Candidates page, the Application Confirmation email is no longer triggered. The Add Applicant email will continue to be triggered if the **Send Email To Potential Applicants** option is selected.

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Add Applicant	<p>This email is triggered when an applicant is added to a requisition from <b>Manage Candidates</b>, <b>Candidate Search</b>, <b>Manage Applicants</b>, or the <b>Add Submission page of the Requisition Snapshot</b>. This email can be sent to External Applicant, Internal Applicant, Applicant Reviewer(s), OU Approver, Hiring Manager, Requisition Owner(s). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.</p> <p><b>Use Case</b></p> <p>Use this trigger to notify applicants or hiring managers when an applicant is added to a requisition. Applicants can be added to requisitions that they did not apply to from the View Requisition Details page. Applicants require this email as it includes a link to the requisition they were added to so that they can complete the application.</p> <p>The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.</p> <p>The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click <b>Forgot Password?</b> again to get a new password reset URL.</p> <p><b>Configuration Note:</b> <i>When creating the Add Applicant email, be sure to include the PASSWORD.RESET.URL tag so that applicants who do not have a profile on the career site will have quick access to the password creation page. When applicants click the link, they are taken to a page for the career site that prompts them to define a password.</i></p>	Recruiting

Application Confirmation	<p>When an applicant submits an application, a notification email can be sent to External Applicant, Hiring Manager, Internal Applicant, or Requisition Owner.</p> <p>This email also applies to applications submitted via a mobile device. For mobile submissions, the email may be triggered multiple times, depending on the number of times the application is submitted. For example, if the applicant submits a partially completed application from their mobile device, and then completes and submits the application from a desktop device, the Application Confirmation email is sent both times the application is submitted.</p> <p>The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.</p> <p>Use Case: Use this trigger to send confirmation emails to applicants after they successfully complete an application.</p>	Recruiting
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## Implementation

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

## Move Onboardees to Future Org Units Based on Time Zone

Prior to this enhancement all new hires were transitioned to their new organizational units (OUs) based on Universal Time Coordinated (UTC). As a result, new hires working in early time zones were unable to access their employee account before mid-day.

With this release, new hire access is based on their future OU location, so they can access their employee account on their first work day.

### Hire Date

Select the date that this user will start in the new position.

**Hire Date \***

### Organizational Units

Select the organizational units the user will be placed into on the Hire Date.

<b>Division *</b>	<input type="text" value="Sales1"/>	<b>Position</b>	<input type="text"/>
<b>Grade</b>	<input type="text"/>	<b>Cost Center</b>	<input type="text"/>
<b>Location</b>	<input type="text" value="Paris"/>	<b>Legal Entity</b>	<input type="text"/>

### Onboarding Workflow \*

Select the onboarding workflow for this user.

### Employee Relationships

Select the employee relationships the user will have on the Hire Date.

<b>Manager *</b>	<input type="text"/>	<b>Approver</b>	<input type="text"/>
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### Preboarding Organizational Units \*

Select the preboarding organizational unit configuration for the user. The user will be placed in these preboarding organizational units when onboarding is started until the hire date.

The system rules for how the user's time zone is defined applies in the following order:

1. The time zone defined by the **Location** OU.
2. If no location is provided, the time zone defined in the **Division** field for the user by preferred timezone.

- If no Location and no Division is defined, the default time zone defined at the top node of time zone preferences is considered.

## How Does this Enhancement Benefit My Organization?

New employees can access their Cornerstone profile on their first day and can immediately start any required tasks.

## Use Cases

The following use cases provide information about how the system manages onboarding time zones.

ONBOARDING STARTED	HIRE DATE	NEW EMPLOYEES PRE-BOARDING TIME ZONE (OR CURRENT TIME ZONE)	DATE AND TIME OF TRANSFER
1 July	1 August	GMT -11	1 August, 1:00 AM GMT -11
1 July	1 August	GMT	1 August, 1:00 AM GMT
1 July 8am GMT-11	1 July	GMT+8	1 July 01:00AM GMT+8
1 July 8am GMT+8	1 July	GMT -13	1 July, at time of action (because GMT-13) is already passed.

## Considerations

- If a user feed is running on the new hire's start date, you may want to adjust your feed so that it is either split by region or runs after all new hires are transferred. If necessary, you can contact Global Customer Support (GCS) to turn off this feature.
- The time or date of the move to the new OU is determined at the moment of launching onboarding. For this reason, new hires whose onboarding was launched before the release will not be affected.

## Implementation

- This functionality is automatically enabled for all organizations using the Recruiting module.
- This functionality can be disabled by contacting Global Customer Support (GCS).

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Start Onboarding	<p>Allows user to start the onboarding process from applicant to employee and view onboarding progress from the Applicant Profile. This permission can be constrained by OU and User's OU.</p> <p>When using the <b>Start Onboarding</b> option on the Applicant Profile page, recruiters must have the <i>Start Onboarding</i></p>	Employee Onboarding

permission and must be able to access the applicant's profile based on their permission constraints for the associated job requisition.

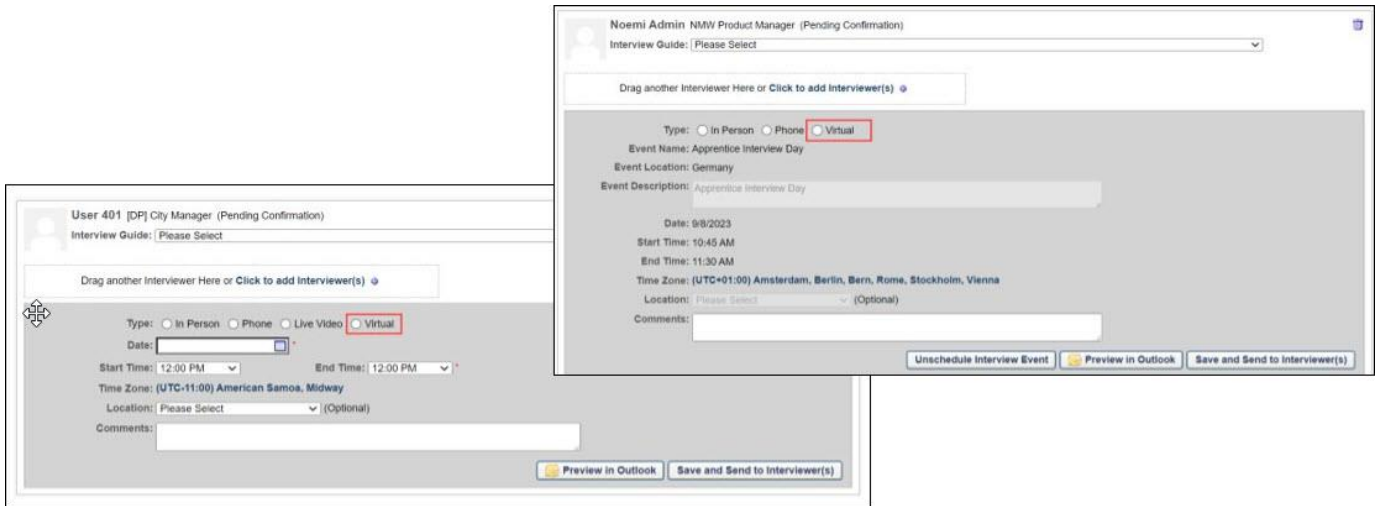


# Interview Scheduling - Usability Enhancements

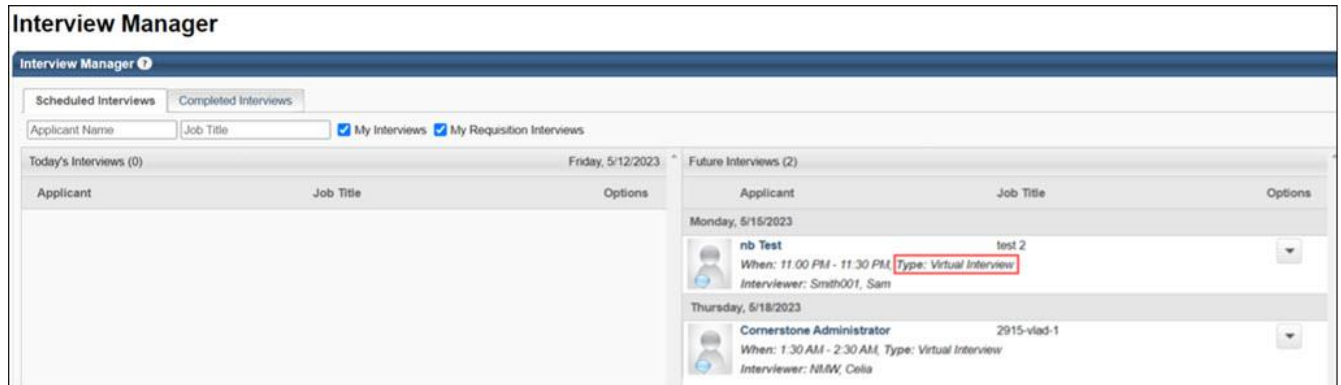
With this release, a new selectable "Virtual" option is available to indicate the interview type, the formatting for comments added by a recruiter is respected for readability, and it is now possible to share a candidate's phone number in an additional email.

The new "Virtual" option is available as follows:

- On the Schedule Interview page and interview events page




- Interview Manager page



- Interview Event Invite page

## Interview Event Invite ✕

 Candidates will be invited to select an available interview time slot for the following Interview Event

### Apprentice Interview Day

Apprentice Interview Day

[< Change Event](#)

---

\* Candidates

Samia NMW

\* Interview format

In-Person Germany

Telephone

Virtual

\* Interview duration

[Send](#)

Once the initial "Virtual" option is selected, it is visible as an information field on the following pages:


- Applicant Profile - Statuses tab
- Hiring dashboard
- Event details page
  
- Applicant Profile - Statuses tab

Summary | **Statuses** | Application | Comments | Documents | History

**New Submission** ▾


**In Review** ▾

**Interview** ▲

**Interview Type:** Scheduled Interview 

**Thursday (5/18/2023)**

**Time:** 10:30 AM - 11:30 AM (CEST) **Virtual: Online Interview**

Interviewer	Scheduling Status	Guide	Recommendation
Celia NMW	 Pending Confirmation	N/A	Pending

- Hiring Dashboard

## INTERVIEWS

### INTERVIEW FEEDBACK ( 1 )

Interviewed : 5/10/2023

**ana csod**

test 2

Virtual Interview



### INTERVIEW REQUESTS ( 1 )

9/7/2023

09:45PM-10:30PM

**Coretta 6daa10a2**

CEV RCE Req

Virtual Interview



### UPCOMING INTERVIEWS ( 1 )

5/17/2023

11:00AM-11:45AM

**Coretta 6daa10a2**

CEV RCE Req


Virtual Interview

Interviewer: Noemi Admin

- Applicant Profile

Welcome, Samia!

**Search Jobs** **Options**

 **Samia NMW**  
nmwolter@cybens.com  
My data is searchable for other positions.

**My Tasks**

Pending

**Virtual Interview**  
Position : Product Manager Req ID : req14804 Date Assigned : 5/15/2023  
Date: 5/17/2023, Time: 11:15 AM - 11:30 AM (SST)  
Please click the Launch link for more details.

**Self Schedule Interview**  
Position : Product Manager Req ID : req14804 Date Assigned : 5/15/2023  
Apprentice Interview Day

**Interview Details**

Wednesday 5/17/2023 11:15AM - 11:30AM (SST)

**Type**  
Virtual Interview

**Interviewing With**  
Noemi Admin

**Close**

- Event Details

**Apprentice Interview Day**

**Event Details**

**Date**  
5/12/2023 - 9/9/2023

**Time Zone**  
(UTC +01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

**Duration**  
45 Minutes

**Type**  
Virtual interview

**Comments**

**Location**  
Germany  
Leinefelde-Worbis, Niederorschel, Deuna, Kleinbartloff, Dün-Heibetal, Dingelstädt

**Available Sessions**

Choose the desired interview session to be scheduled by selecting the appropriate session start time, then select the Schedule Session button.

Tuesday, 5/16/2023	Wednesday, 5/17/2023	Friday, 5/19/2023
Morning	Morning	Morning
Not Available	Not Available	Not Available
Not Available	Not Available	Not Available

The Interview Type field also displays "Virtual" as information in the following emails sent to candidates:

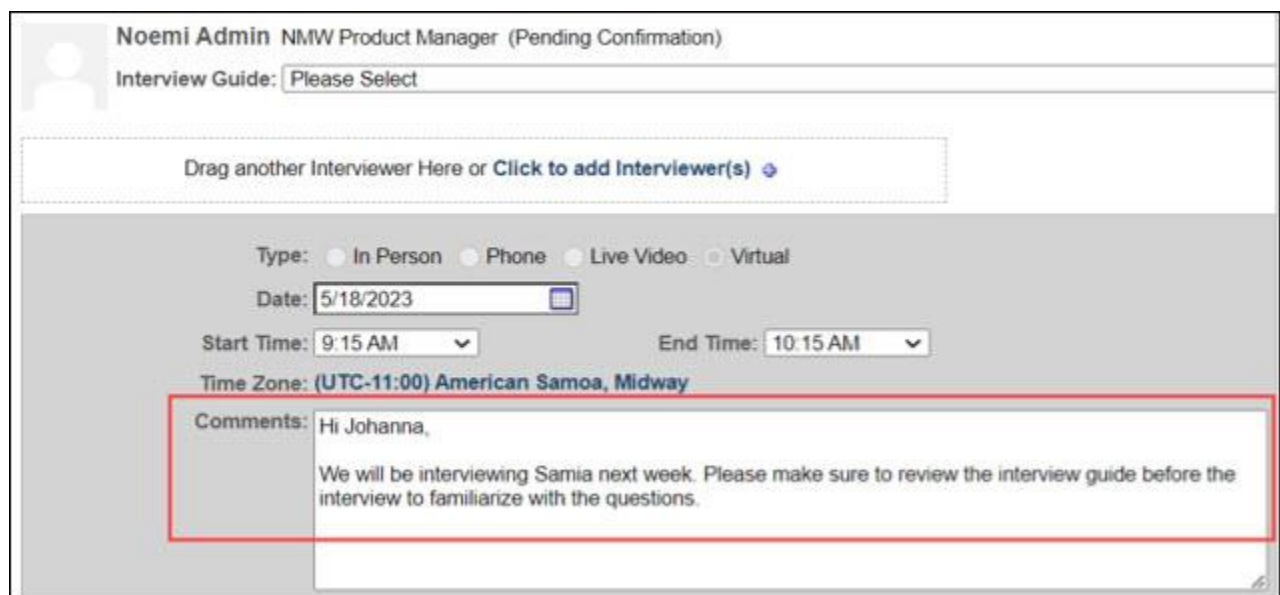
- Interview scheduling notification Applicant + Interviewer

- Today's scheduled interview
- Interview Cancelled notification
- Interview scheduling response
- Interview recommendation pending
- Interview Recommendation nudge
- Interview Recommendation recorded
- Invitation to Interview Event (Applicant Self Schedule)

## Comments

For readability, the Schedule Interview and Interview Event pages now respect the line breaks in the Comments field so that these comments appear as written when visible in the email sent to the candidate.

- Recruiters can also add comments for the interviewer.



The screenshot displays the 'Schedule Interview' interface. At the top, it shows the user 'Noemi Admin NMW Product Manager (Pending Confirmation)' and an 'Interview Guide' dropdown set to 'Please Select'. Below this is a dashed box with the text 'Drag another Interviewer Here or Click to add Interviewer(s)'. The main form area has a grey background and includes the following fields: 'Type' with radio buttons for 'In Person', 'Phone', 'Live Video', and 'Virtual'; 'Date' set to '5/18/2023'; 'Start Time' set to '9:15 AM'; 'End Time' set to '10:15 AM'; and 'Time Zone' set to '(UTC-11:00) American Samoa, Midway'. A 'Comments' field is highlighted with a red border, containing the text: 'Hi Johanna, We will be interviewing Samia next week. Please make sure to review the interview guide before the interview to familiarize with the questions.'

- Recruiter comments appear exactly as written in the email sent to the candidate.

**Applicant Scheduling**

You are about to send a notification to the Applicant. Please select from the following options:

Type: In Person  
 Location: Please Select  
 Date: 5-5-2023  
 Start Time: 1:45 PM End Time: 2:00 PM  
 Time Zone: (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna  
 Interviewer(s): Add Interviewer(s)  
 Vaibhav Hatge

Type: Virtual  
 Date: 5-17-2023  
 Start Time: 11:15 AM End Time: 11:30 AM  
 Time Zone: (UTC-11:00) American Samoa, Midway  
 Interviewer(s): Add Interviewer(s)

Add another Interview

Comments to Applicant (Optional):  
 Please bring your application file and a your ID card with you on the day of interview. I will be meeting you at the reception at 9:00 and we will first do a tour of the office. We will then start the interview with Johanna who is the hiring manager.  
 You will find our office here, they are well reachable by public transport.  
<https://goo.gl/maps/QAa2ZWASHoxZCMn28>

Hi Johanna,

We will be interviewing Samia next week. Please make sure to review the interview guide before the interview to familiarize with the questions.

Please bring your application file and a your ID card with you on the day of interview.  
 I will be meeting you at the reception at 9:00 and we will first do a tour of the office. We will then start the interview with Johanna who is the hiring manager.

You will find our office here, they are well reachable by public transport.  
<https://goo.gl/maps/QAa2ZWASHoxZCMn28>

## Reporting 2.0

This new virtual interview type also appears under the field "Interview type" in Reporting 2.0.

## PROFILE.USER.PHONE tag Email Trigger

The PROFILE.USER.PHONE tag can now be sent to the recruiter in advance of the interview. If there is no phone saved on the candidate's profile, the information is left blank in the email.

## Implementation

- This functionality is automatically enabled for all organizations using the Recruiting module.
- The Virtual interview type can be turned off by contacting Global Customer Support (GCS).

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Applicants: Manage Interviews	Grants ability to manage and schedule interviews for applicants. This permission cannot be constrained.	Recruiting
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Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Interview Scheduling Notification - Interviewer(s)	<p>This email is triggered when an interview scheduling notification is sent to interviewers. The email can be sent to Applicant Interviewer(s) or a specific user. This email can be configured as a Notification or Reminder type email. For Reminder type emails, the reminder is triggered a set number of days, hours, or minutes before the interview start time. This email is active by default and can be found in the Recruitment action type section of Email Management.</p> <p>This email is used when sending Outlook Meeting Invite requests. The email contains an ICS attachment if Outlook notifications are enabled by the administrator in Interview Management Preferences.</p> <p>This email is used when using Outlook Scheduler to preview the email, if the Outlook scheduling option is enabled by the administrator in Interview Management Preferences.</p> <p>Use Case: When a recruiter schedules an interview, they may want to notify the interviewers about the scheduled date, time, and interview type. Use this trigger to notify the interviewers that an interview session is scheduled.</p>	Recruiting
Interview Scheduling Notification - Applicant	<p>This email is triggered when an applicant scheduling notification is sent to the applicant, and is also triggered when an applicant self scheduled an interview for an interview event. The email can be sent to External Applicant, Internal Applicant, or a specific user. This email is active by default and can be found in the Recruitment action type section of Email Management.</p> <p>Use Case: When a recruiter schedules an interview, they may want to send a notification to the applicant about the scheduled date, time, and interview type. Use this trigger to notify the applicant that an interview session is scheduled.</p>	Recruiting



# Send Email from Manage Candidates and Templates Enhancements

With this enhancement, candidate communication is enhanced by:

- Allowing administrators to add Reply-To Address and Reply-To Display Name fields to a candidate email template.
- Allowing recruiters to provide an appropriate Reply-to address when contacting a candidate and attach documents to the email when necessary.
- Allowing candidates to reply to a generic or dedicated Reply-to address provided, instead of the recruiter's personal email address.
- Allowing a recruiter to and view and respond to a candidates messages even if another recruiter started the conversation.

## How Does this Enhancement Benefit My Organization?

These new features enhance privacy and confidentiality while maintaining effective communication with candidates.

## Reply-To Functionality

The new Reply-To functionality applies to administrators, recruiters, and candidates.

### Administrators

Administrators can use the email templates page to add a field for a generic or dedicated Reply-To Address and Reply-To Display Name field.

To access email templates, go to [ADMIN > TOOLS > RECRUIT > EMAIL TEMPLATES](#).

## Edit an email template using the fields below.

Please note any changes to values of Category and Template Active fields will be applicable to the entire template with all languages and NOT specific to any language template.

Category

Candidate Email ▼

Template Active



\* Language

Mark selected language as default

English (US) ▼



\* Title

Request Additional Information from Candidate

\* Description

Email template to request additional information from candidate

Reply-To Address

Use this when the candidate reply should go to a different email address such as a group email address.

Reply-To - Display Name

Use this to show a name for the Reply-To email address shows to the candidate to make it more user-friendly.

\* Subject

Request for additional information for position **JOB.TITLE**

\* Message

← → 📄 <> **B** *I* U sans-serif 16px **A**

**SHOPNOW**

Dear **PROFILE.USER.NAME.FIRST**,

Thank you once again for the interest you have shown in working for our company.

Before we can review your application for position **JOB.TITLE** with the respective department we need additional information.

Can you please provide your availability for this position?

Yours sincerely

[View Tags](#)

Cancel

Save and add another language

Save

## **Recruiters**

Once the Reply-To fields are available, recruiters can use these fields to provide the appropriate return email address and display name and attach relevant documents to the candidate communication.

To access the Send Email functionality, go to [RECRUIT > MANAGE CANDIDATES](#) and select one or more candidates. From the More drop-down, click **Send Email**.

# Send Email



\* To

Simon Varde Ana Manuta

Select Template Language

English (US)



Choose a Template

Select Template



Reply-To Address

Use this when the candidate reply should go to a different email address such as a group email address.

Reply-To Display Name

Use this to show a name for the Reply-To email address shown to the candidate to make it more user-friendly.

\* Subject

↶ ↷ 👁 <> **B** *I* U sans-serif 16px ⋮

Drag and drop files here

 Browse

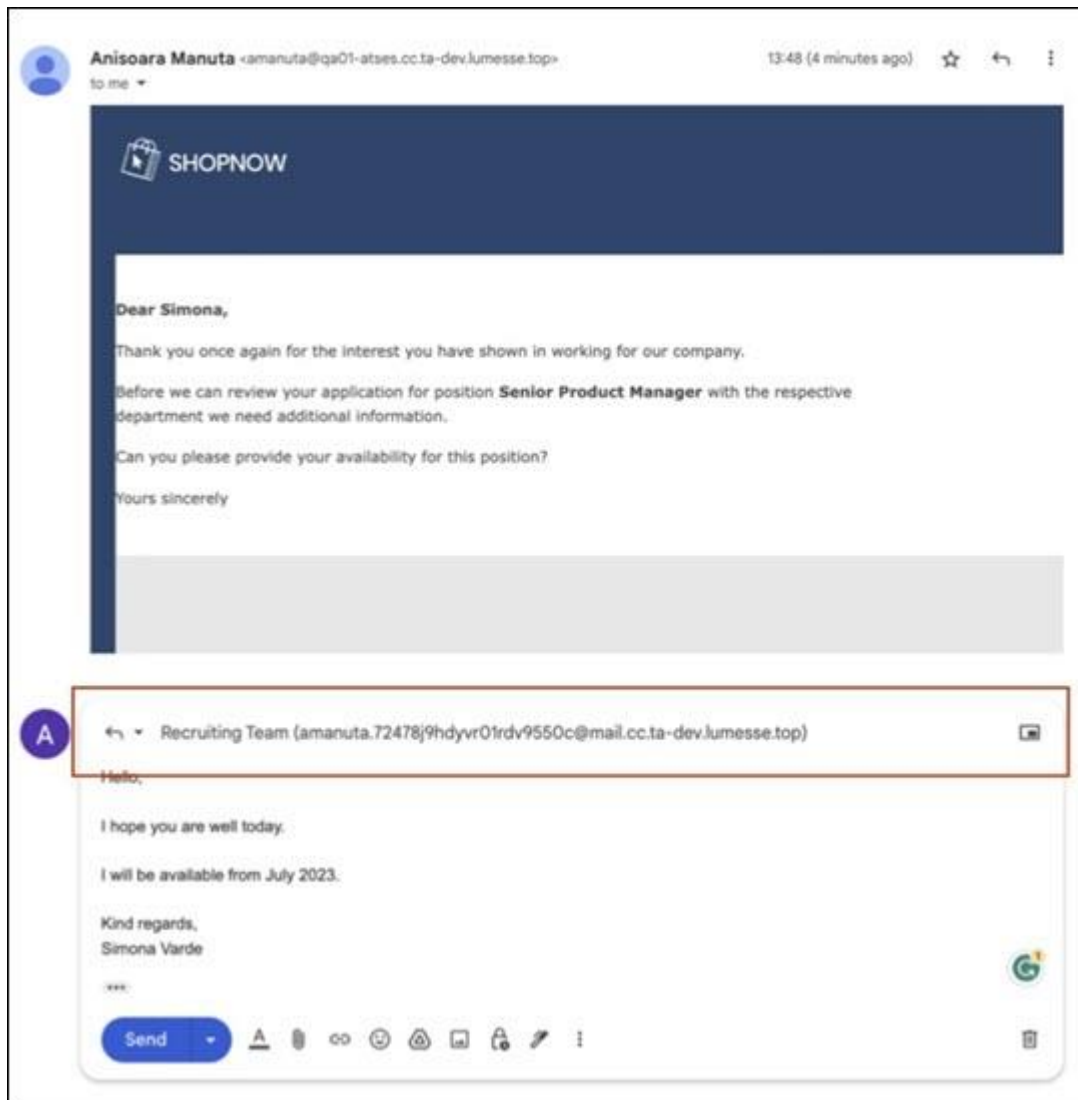
View Tags

Send

**Note:** If the Reply-To address is blank, the candidate's return email is sent to the recruiter's email address. If the Reply-To Display Name is blank, the candidate will see the recruiter's full name.

## Candidates

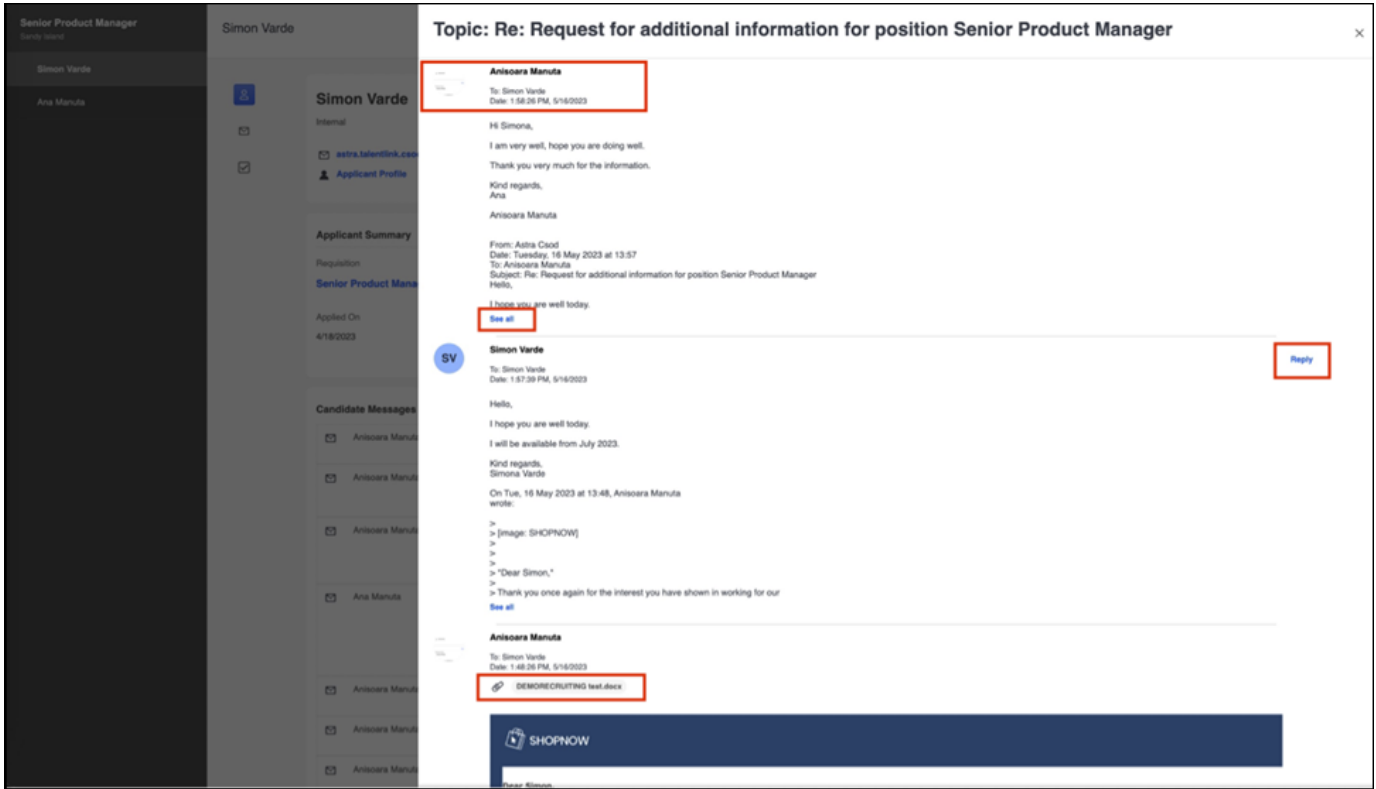
The selected Reply-To address and display name appear as the return information on the email sent to the candidate.



## View Candidate Conversations and Reply to Candidate

Recruiters can view candidate conversations, including the sender's avatar, full name of the sender and recipient, and the date the email was sent, and any attached documents. Additionally, recruiters can reply to the candidates email and attach documents, even if another recruiter initiated the conversation.

To view candidate conversations, go to Recruit > Manage Candidates. Select a candidate, and then click a conversation from the Candidate Messages section. The conversation flyout opens.



## Attached Document Formats

Recruiters can attach the following documents or files types to candidate emails. The file size limit is 5MB and the total file size per email is 10MB. Supported file types are:

.avi	.gif	.mid	.png	.vsd
.bmp	.htm	.mp3	.pps	.wav.
.doc	.html	.mp4	.ppt	.wma
.docx	.jpg	.mpeg	.ppsx	.wmv
.dot	.jpeg	.mpg	.pptx	.xls
.dotx	.m4a	.mpp	.rm	xlsx
.flv	.m4v	.pdf	.txt	.zip

## 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
Recruiting Configure Email Templates- Manage	Grants ability to configure email communication templates for Recruiting. This permission cannot be constrained. This is an administrator permission.	Recruiting

# Update Compliance Question “Voluntary Self-Identification of Disability Form”

Customers operating in the US and following Office of Federal Contract Compliance Programs (OFCCP) compliance requirements must ensure that the set of compliance questions is reflecting the latest directives of the US Government.

This enhancement updates the text of the “Voluntary Self-Identification of Disability Form” so that the deadline of July 25, 2023 is met.

A new default compliance question “Voluntary Self-Identification of Disability Form” will be available. Its content is aligned with the text provided by the US Department of Labor:

[https://www.dol.gov/agencies/ofccp/self-id-forms?utm\\_medium=email&utm\\_source=govdelivery](https://www.dol.gov/agencies/ofccp/self-id-forms?utm_medium=email&utm_source=govdelivery)

The previous question(s) on disability self-identification will not be disabled, as they may be used by customers who have custom compliance questions. The new question can be differentiated from the others by looking at its expiration date.

For customers who configured OFCCP compliance via the setting in Recruiting’s Compliance Enablement Preferences, the previous question on self-identification of disability is automatically replaced with the new one. Customers can disable the old compliance question but should ensure it is not used in any custom Compliance Enablement configuration.

- To manage compliance questions, go to [ADMIN > RECRUIT > COMPLIANCE QUESTION BANK](#).
- To configure compliance settings for job requisitions, search candidates, and compliance questions, go to [ADMIN > RECRUIT > COMPLIANCE ENABLEMENT](#).

## Notes:

- *To report on both questions, please use Reporting 2.0. The standard compliance report only contains the latest question. In Reporting 2.0, the new question is identifiable through its ID `eeo_question_response__3`.*
- *Customers using Reporting API that want to export responses to the new compliance question should use `vw_rpt_ats_compliance_question_applicant_responses`, knowing that the new compliance question on Disability has the ID `eeo_question_response__3`.*
- *The responses of candidates who applied before the July ’23 Release, will continue to be available for the previous question in reporting (as this is the question they responded to), while candidates applying after the July ’23 Release will see the new question and have their answer recorded accordingly in reporting.*
- *English (US) language is supported with the July ’23 Release. Translations will be delivered in a post-release patch.*

## Considerations

Translation is not available with this release.

## 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
Compliance Enablement Preferences - Manage	Grants ability to access and manage Compliance Enablement Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Compliance Question - Manage	Grants ability to access and manage Compliance Question Bank. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration