

Cornerstone March 2023 Release Notes

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Release Notes for March 2023

What's New for March '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 March '23](#) on page 21 *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 March '23](#) on page 23 *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 March '23](#) on page 24 *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 March '23 release:

Content Anytime Features

FEATURE NAME	DESCRIPTION
<p>Content Anytime - Q1 and Q2 Updates</p>	<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 Q1 and Q2 refreshes are listed below. Please refer to the 2023 Content Refresh Calendar for the timing of refreshes for all of 2023.</p> <ul style="list-style-type: none"> ○ January 6 - January 13: Additions Only ○ February 3 - February 10: Additions Only ○ March 10 - March 17: Additions and Q1 Removals ○ April 7 - April 14: Additions Only ○ May 5 - May 12: Additions Only ○ June 2 - June 9: Additions and Q2 Removals

Content Studio

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Content Studio	<p>Yes, for existing Cornerstone Content customers. Content Studio is also available for purchase for non-content customers.</p> <p>Content Studio is targeted to be automatically enabled with the March '23 Release for US customers in LAX swim lanes with Content subscriptions, and in the March 31 post-release patch for global customers with Content subscriptions.</p> <p>For this initial launch, Content Studio is not available for Life Science customers or customers located in swim lane 4. Content Studio is only available in Production environments.</p>	<p>Content Studio is a content discovery, curation, and insights platform that helps customers explore Cornerstone's content offerings before making any purchasing decision. Prior to this feature, finding, procuring content from multiple vendors, and getting engagement on right content was challenging for an organization.</p> <p>Content Studio helps in curating highly effective and engaging content along with insights to drive success. It is driven by AI powered search and consumption metrics which uses comprehensive filters to identify the best content that fits organizational needs. Content Studio is a companion application to Cornerstone CSX, and it can be accessed with a single click without having to manage a separate login.</p>

Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Accessibility Enhancements	Yes	<p>The following accessibility enhancements are included with the March '23 Release:</p> <ul style="list-style-type: none"> ○ Accessibility Enhancements - Learning
ADP Decidium Core Data Inbound Integration	<ul style="list-style-type: none"> ○ Available in ADP French Marketplace 	<p>The new ADP Decidium Core Data Inbound Integration provides a one-way synchronization of users and organizational unit (OU) data from ADP Decidium to a Cornerstone portal.</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
	<ul style="list-style-type: none"> ○ Available in Edge Marketplace for CDG, FRA, and LHR swim lanes 	
<p>Auto Suggestions for Search</p>	<p>Yes, with latest version of app</p>	<p>With this enhancement, the search within the Cornerstone Learn app predicts the user's query and provides suggestions as the user types. Up to 10 matching search results displayed when two or more characters are typed. Matching search text is highlighted in the suggested results overlay. When the user selects a suggested result, the user is navigated to the suggested page.</p> <p>This functionality is not available during UAT.</p>
<p>Capabilities Experience Improvements</p>	<p>Yes</p>	<p>With this enhancement, small but meaningful improvements are made to the Skills interface and experience that provide visual cues and information, making interactions more intuitive and providing richer details about how the functionality works.</p>
<p>Capability Model Targets</p>	<p>Yes</p>	<p>With this enhancement, administrators can set proficiency level targets for all users or for specific organizational units. When capability model targets are set, users see targets in a table in the Skills Profile outlining their critical skills, proficiencies, targets, and status. In instances where a user is aligned to multiple models with different target levels, the highest proficiency target is shown.</p>
<p>Copy Down: Grant Access Rights to System Administrator of a Customer Portal</p>	<p>Yes</p>	<p>With this enhancement, system administrators can more effectively view and manage their portal's copy downs. The new Copy Down administration page enables administrators to do the following:</p> <ul style="list-style-type: none"> ○ View copy down records ○ View copy down details and blackout dates

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> ○ Cancel copy down requests and provide a cancel reason ○ Subscribe and unsubscribe to email notifications
<p>Cornerstone Learning Connector for ADP Workforce Now® Next Generation</p>	<p>Available in Edge Marketplace</p>	<p>Cornerstone CSX currently has core (user and organizational unit) and single sign-on (SSO) integrations with ADP's Workforce Now. ADP will stop selling Workforce Now. This new integration provides a migration path for existing customers and provides integration solutions to new customers.</p> <p>The ADP Workforce Now Next Generation Integration includes the following key features:</p> <ul style="list-style-type: none"> ○ Cornerstone Learning Connector for ADP Workforce Now Next Generation ○ Cornerstone Learning Single Sign-on for ADP Workforce Now Next Generation <p>This integration is available as of February 14.</p>
<p>CSX "User Record as of a Date" Standard Report Deprecation</p>	<p>N/A</p>	<p>The "User Record as of a Date" Standard Report is being deprecated with the March '23 Release. Customers are encouraged to use alternative reporting options that are currently available today.</p>
<p>CSX Custom Reports Deprecation</p>	<p>N/A</p>	<p>Phase 3, the final phase of the CSX Custom Reports deprecation, is occurring with the March '23 Release. With Phase 3, all remaining access to custom report is removed. Customers can no longer use or migrate Custom Reports at all. Custom Report Dashboard widgets will also no longer be available, which means any published custom report widgets will be removed from Dashboards as well. Please review the Deprecation phases and their milestones at the end of this deprecation announcement.</p>
<p>Custom Login Page - Advanced Option in Colorblock Layout</p>	<p>Yes</p>	<p>With this enhancement, the <i>Advanced Option</i> section is included in the Colorblock layout to allow customers to add an SSO link as well as a Self Registration link when creating new custom login pages. Text, link text,</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		and color can be customized for these SSO and Self Registration links.
Deep Links in the Learn App	Yes, with latest version of app	<p>With this release, Cornerstone Learn app users are taken directly to the relevant page in the Learn app when the following types of deep links are accessed using a mobile device:</p> <ul style="list-style-type: none"> ○ Training Detail ○ Transcript ○ Launch and Register ○ Launch Training <p>This functionality is not available during UAT.</p>
Default Email Address Settings - Option to Define Multiple Addresses	Yes	<p>With this enhancement, administrators have the option to define up to 10 default "From" and "Reply-To" email addresses in the <i>Default Email Address Settings</i> section of Corporate Preferences. Once defined, they can be selected when creating or updating an email in Email Administration and in Marketing Communications. Administrators can edit and delete default email addresses at any time.</p> <p>This functionality is not available at the start of UAT.</p>
Deprecation of User and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) - March '23 Update	N/A	<p>Ability to perform Users and OU data loads and feeds using DLW was deprecated with an end-of-life in the May '22 Release for most customers. Some customers were excluded from the May '22 deprecation schedule due to missing feature parity in Edge Import.</p> <p>Most of the missing parity features those customers were dependent on became available in Edge Import with subsequent releases</p>
Edge Import - Allow Update to Requisition Templates Created From UI	Yes	<p>With this enhancement, administrators can now update any requisition template through Edge Import. Requisition Template ID and Requisition Template Reference IDs can be retrieved from Reporting 2.0 and used to update any requisition template.</p>
Edge Import - Learning Load	Yes	<p>With this enhancement, training loads are updated with new fields and functions.</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Enhancements (Training Loads)		
Edge Import - Learning Load Enhancements (Transcript Loads)	Yes	<p>With this enhancement, additional functionality is added for updating transcript statuses using Edge Import.</p> <ul style="list-style-type: none"> ○ Online Course Transcript Load - Previously, administrators could use this load to create transcript records in Failed status, and they could update transcript statuses from In Progress to Completed or Exempt. However, they could not update transcript statuses from In Progress to Failed. With this enhancement, administrators can update transcript statuses from In Progress to Failed. ○ ILT Transcript Load - Previously, the default value for the Pass/Fail field was Fail. With this enhancement, the default value for the Pass/Fail field is Pass. This default value is only applied if the Pass/Fail field is not mapped in the load configuration or for records in the loaded file that do not contain a value for the Pass/Fail field.
Edge Import - New Learning Load Type (Certification Transcript Update)	Yes	<p>With this enhancement, Edge Import now provides the ability to edit certification due dates, edit certification expiration dates, and archive or unarchive certifications in bulk via manual loads using Edge Import.</p>
Edge Import Framework - Download Original File Uploaded	Yes	<p>With this enhancement, customers can download the original file that they uploaded for an Edge Import data load. This option is available in the Load Details section of Edge Import. The name of the file is now a link so the file that was uploaded can be downloaded. The link to download the file is only available to the user who uploaded the file.</p>
Goals in the Learn App	Yes, with latest version of app	<p>With this enhancement, support for Goals is introduced in the Cornerstone Learn app. App users can access their goals from the Home screen. The Goals page lists the user's goals with overall progress and weight</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<p>details. Users can view goal details, including Tasks, Targets, Comments, and Attachments. Users can sort and filter their goals.</p> <p>This functionality is not available during UAT.</p>
<p>March '23 Language Pack Updates</p>	<p>Yes</p>	<p>New updates to Cornerstone Language Packs and additional languages are available with the March '23 Release. Please visit the March '23 Language Pack Updates posting to review the full list of changes and their targeted availability in stage and production environments.</p>
<p>New Email Action Type for Skills Rating Feedback Requests</p>	<p>Yes</p>	<p>With this enhancement, a new Skills Feedback action type is available in Email Administration, and a new email trigger, "Skills Feedback Requested," is available for this action type. When active, this email is triggered when a user requests skills feedback. This email can be configured as a reminder or a notification, and it can be sent to Rater (the person whose feedback is requested), Requester (the person requesting the feedback), or a specific user.</p>
<p>OK Button Removed from SSO Timeout, Logout, and Error Pages</p>	<p>Yes</p>	<p>With this enhancement, the OK button is removed from the SSO Timeout, Logout, and Error pages.</p>
<p>People Matrix - Manager Mode</p>	<p>Yes</p>	<p>A new People Matrix feature displays a group of users and their proficiency for a set of capabilities. Managers can configure which users and capabilities are included in the matrix.</p>
<p>Re-naming Cornerstone Learn App in July 2023</p>	<p>N/A</p>	<p>Cornerstone will rename the existing "Learn" App to simply "Cornerstone" 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.</p>
<p>Reporting 2.0 - Additional Fields</p>	<p>Yes</p>	<p>The following additions and updates have been made to Reporting 2.0 fields with this release:</p> <ul style="list-style-type: none"> ○ Reporting Fields - Check-Ins ○ Reporting Fields - Competencies

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> ○ Reporting Fields - Goals ○ Reporting Fields - Learning ○ Reporting Fields - Succession
Reporting 2.0 - Calculated Fields: Add Parameters Hour, Minute, and Second to Function DATEADD	Yes	With this enhancement, the DATEADD function now also supports the following time parameters: Hour, Minute, and Second.
Reporting 2.0 - Calculated Fields: Additional Validations	Yes	With this enhancement, additional validations are performed in the calculated field editor to ensure correctness and successful generation of reports with calculated fields.
Reporting 2.0 - Calculated Fields: Convert Date and Time to User's Time Zone	Yes	With this enhancement, report owners can choose whether to display a calculated field date and time value as per the user's local time zone or in UTC. A new Localized time zone toggle is added in the calculated field editor to convert date and time. The toggle is enabled by default, which applies the user's local time zone by default. When the toggle is disabled, Reporting 2.0 applies UTC time zone to date and time values in the calculated field.
Reporting 2.0 - Calculated Fields: Field Selection When Two Fields with Almost the Same Name Exist	Yes	With this enhancement, the calculated field now recognizes and includes the exact field that is selected by the report owner, even if the name of the selected field is nearly the same as another field.
Reporting 2.0 - Calculated Fields: Nesting for Aggregate Functions	Yes	This enhancement enables report builders to nest one aggregated function within another, thereby allowing them to execute more calculation use cases directly in Reporting 2.0. Reporting 2.0 permits nesting aggregate functions up to one level so that report builders can use operations like CASE(GAVG), and IF(GMAX).

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reporting 2.0 - Calculated Fields: New Operators to Include Both NULL and Empty Strings	Yes	With this enhancement, report owners can now include both NULL and empty values while a creating a calculated field. They can also replace these values with preferred alternative values.
Reporting 2.0 - Chart Color Preferences for Shared Users in Reporting 2.0	Yes	With this enhancement, report owners can share their defined chart color palette for a specific report with its shared users. You can do this by selecting the new Apply as default color palette for this report when shared checkbox in the color selection flyout and saving the report. When this option is selected, the report owner's defined chart color palette is only applied to fields in the shared report, and it will not affect shared user's color preference for same fields in other reports.
Reporting 2.0 - Include All or Only the Latest Version of a Training in a Report	Yes	With this enhancement, when selecting training to include in a Reporting 2.0 report, you can choose to include all versions of the training or only the latest version. It helps in producing more targeted reports and create a better user experience.
RTDW Updates to OData v4.0 Delta Objects	Yes	Impacting only customers using Data Exporter API. New objects will be added that support the OData v4.0 Delta/Change Tracking capabilities for Data Exporter API, initially released in August '22. A consolidated list of Data Exporter API objects that currently support OData Delta/Change Tracking is maintained in the RTDW Documentation Community. Join and follow the community to be notified of new objects with Delta support.
RTDW Updates to Reporting API, RDW, Data Exporter, and Data Exporter API	Yes	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.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		Documentation that describes RTDW views and fields used in Custom Reports will be updated for the March '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.
Security Role Administration Enhancements	Yes	The following enhancements have been made to Security Role Administration to help prevent inadvertent errors when creating and updating security roles: <ul style="list-style-type: none"> ○ The security role name is displayed when adding permissions to a security role ○ The permission name is displayed when adding constraints ○ "(Copy)" is displayed in the role name when copying an existing role
SOAP API Deprecation in 2023 Q4	N/A	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.
XLS to XLSX Output Format Upgrade - Most-Used Standard Reports	Yes	With the March '23 Release, the most frequently used Standard Reports are now exported to excel as an .XLSX format.

Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
CSX "User Record as of a Date" Standard Report Deprecation	N/A	The "User Record as of a Date" Standard Report is being deprecated with the March '23 Release. Customers are encouraged to use alternative reporting options that are currently available today.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Form Enhancements	Yes	<p>With this enhancement, two new Forms features are available:</p> <ul style="list-style-type: none"> ○ Target User Name in Request Titles: When viewing a request, the target user's name is added to the Request Title. ○ "Personal Email Address field": "Personal Email Address" is added as a standard field when creating a form.
Form Management – Disable Form Fields in Reporting	Yes	<p>With this enhancement, a new Include form in reporting option appears on the Manage Forms page. By selecting this option, administrators can decide per form if the response fields used in a form are reportable. Disabling form fields that are not in use anymore ensures that the number of fields reportable across forms stay below the system limit and ensures that form data updates correctly in reporting</p>

Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Ability to Reset Client ID and Secret for Webex Control Hub	Yes, for all organizations using the Learning module with a Webex vILT integration using Control Hub.	<p>With this enhancement, administrators can now reset the Client ID and secret key to generate a new token.</p>
Accessibility Enhancements - March 2023	Yes	<p>With this release, the following accessibility enhancements have been included:</p> <ul style="list-style-type: none"> ○ Color Contrast and Visual Cue Improvements ○ Improvements for Screen Readers ○ Improvements to Keyboard Navigation and Browser Focus <p>Some items will be released in a post-release patch.</p>
Certifications -	Yes	<p>This enhancement allows a dynamic certification proxy to be configured with a new Dynamic Re-Enroll toggle. When</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Dynamic Re-Enrollment		this toggle is enabled, the dynamic certification proxy dynamically re-enrolls individuals who have been removed from a certification, allowing them to continue to work on the certification requirements. Enhanced auditing is available in modification history, proxy user history details, and approval history. New confirmation messages display when inactivating or activating a proxy enrollment or interacting with the dynamic re-enroll and dynamic removal toggles.
Create Tool Enhancements	Yes	With this release, using the Create Tool, users can create interactive cards, add hints to Questions, change fonts, and export custom-built courses as SCORM 1.2.
Curriculum Player 2.0 – Milestone 2 (Open Beta)	<ul style="list-style-type: none"> ○ Must be enabled in Feature Activation Preferences. ○ If currently enabled in Stage, automatically enabled. 	With this enhancement, Curriculum Player 2.0 provides a modernized user interface (UI) that allows for an intuitive, straight forward path to the steps needed to complete a curriculum.
Custom E-Signature Message for Sessions	Must be enabled on the Default Training Completion Electronic Signature Preferences page.	With this enhancement, if an e-signature message is added to an event in the catalog, this custom message will be presented to the learner for the session. This ensures relevancy and clarity for the Learners signing a session completion message.
Essential Transcript Data Deletion for Compliance (Early Adopter)	No	With this enhancement, Essential Transcript Data Deletion provides organizations the ability to automatically delete User Transcript Data based on a defined retention period for inactive users in accordance with various regulations, such as the EU GDPR and the Right to be Forgotten policy.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Express Class Definable Training Time	Yes	With this enhancement, learning administrators or training facilitators can define the actual time spent in training when submitting an Express Class, on both individual or bulk levels. Observed Training Hours and minutes can be defined for Express Class attendees, whose values can then be seen via the User Interface (UI) or in Reporting after completion.
ILT – New Roster (Open Beta)	Yes	<p>With this enhancement, the Attendance and Scoring tab is redesigned and provides the following new options:</p> <ul style="list-style-type: none"> ○ A unified event and session summary. Administrator can always see which session they are managing from this page. ○ A consistent display of user information. ○ The ability to filter by learner status.
ILT Roster – New User Interface (Early Adopter)	<ul style="list-style-type: none"> ○ In Stage: This functionality is automatically enabled for all organizations by default. ○ In Pilot and Production: Off by default for all customers. Turn on in Feature Activation Preferences. 	With this enhancement, the ILT Roster user interface (UI) now has a modern look and feel! None of the functionality changes - the information is just clearer and modernized for ease-of-use.
Reporting Fields - Learning	Yes	<p>With the March '23 Release, new fields have been introduced to the Learning area of Reporting 2.0:</p> <ul style="list-style-type: none"> ○ Training > Training Details fields have been added ○ Certifications fields have been added

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
SCORM 1.2 Embedded Videos to Play Full-Screen	Yes	With this enhancement, when the expand icon is clicked, SCORM 1.2 videos play in full screen.
Search Language Enhancements - March 2023	Yes	<p>This enhancement improves search results and character recognition by utilizing new, specific analyzers for Korean, Japanese, and Chinese when the display language is set accordingly. In cases where special characters are used, search results are improved.</p> <p>It may take up to 25 days for the update in functionality to be present in stage portals and up to 45 days for production portals.</p>
Slack Integration (Learning in the Flow of Work)	Available in Edge Marketplace	Learners often juggle between many applications that they must use for their day-to-day work. To simplify this experience and encourage learning, Cornerstone CSX can now integrate with Slack. When an organization installs the integration, a Slack chatbot pushes training reminders to learners in Slack, an app that they are already using.
Stripe – Payment Gateway	<ul style="list-style-type: none"> ○ Enabled in the Edge Marketplace by Service Enablement team once the product is purchased. ○ In Stage/Pilot, enable this payment processor via EDGE. 	With this enhancement, Extended Enterprise customers can now use Stripe to process credit and debit card transactions in the portal.
Upgrade Excel Format of Exports in	Automatically enabled in Stage. To enable in	With this enhancement, Excel download options for the ILT sign-in sheet and Roster export are upgraded with the extension .xlsx to make downloads easier to use for administrators and instructors.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
ILT (Early Adopter)	Production or Pilot, contact.	
Versioning Redesign Enhancements (Open Beta)	Automatically enabled for all organizations using the Learning module. Additionally, customers must self-enable the feature in Feature Activation Preferences in Stage Portal.	With this enhancement, new Curriculum Versioning workflows provide consistent and reliable behavior when a Curriculum child Learning Object (LO) is versioned or Curriculum structured is modified simultaneously. The new workflows ensure that the Versioning and Assignment process happens correctly and consistently. Additionally, an icon is available on the Curricula Administration page that lets administrators know that versioning is still in progress if versioning happened through an administrator's structure changes.
View and Edit Test Versions with a Future Effective Date	Yes	With this enhancement, the Test Engine list view displays Pending for test versions with a future effective date, along with who created them, their effective date, and what its structure contains. Administrators can check the structure to affirm its accuracy and modify if needed.

Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Bulk Reopen Performance Review Steps (Early Adopter)	Yes	With this enhancement, a reviewer can reopen a review step for one or more reviewees at the same time and provide a reason for reopening the step. Note: <i>Only one step can be opened at a time.</i> Additionally, comments about why someone is reopening are visible in Review Task Central.
Check-Ins Usability Enhancements	Yes	There are two new enhancements to improve the user experience and usability for Check-Ins users: <ul style="list-style-type: none"> ○ Launch skills feedback requests and ratings from Check-Ins.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> ○ Improved experience for administrators uploading guidance files to a template.
Check-Ins Meeting Statuses	Yes	With this enhancement, managers and employees can mark meetings complete or cancelled. This allows administrators to report on the use of Check-Ins in their organization.
Check-In Personal Notes	Yes	With this enhancement, users can create personal notes that are not visible to anyone except the writer of the note. This allows managers and users to create personal notes that they may want to refer to during the meeting or take personal notes during the meeting for future reference. Users can view or edit their previous notes at any time. The previous notes for the last three months are available by default.
Competency Experience Improvements	Yes	With this enhancement, administrators can manage Competencies and Observation Checklists after they are created and in use. Additionally, user's won't see trainings in which they are no longer enrolled.
Reporting Fields - Check-Ins	Yes	<p>With the March '23 Release, new fields have been introduced to the Check-Ins area of Reporting 2.0:</p> <ul style="list-style-type: none"> ○ Check-Ins fields have been added
Reporting Fields - Competencies	Yes	This enhancement renames the “Competency Item Assessor ID” field to “Competency Item Anonymized Assessment ID.” The revised field name more clearly describes the value included in the output.
Reporting Fields - Goals	Yes	<p>With the March '23 Release, new fields have been introduced to the Goals area of Reporting 2.0:</p> <ul style="list-style-type: none"> ○ Goals Targets > Targets fields have been added ○ Goals Tasks > Tasks fields have been added
Reporting Fields - Succession	Yes	<p>With the March '23 Release, new fields have been introduced to the Succession area of Reporting 2.0:</p> <ul style="list-style-type: none"> ○ Succession Task fields have been added

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Review Task Central (Early Adopter)	Yes	<p>With this enhancement, the new Review Task Central provides reviewers an easy way to view, submit, and calibrate all their assigned steps in one location.</p> <p>Additionally, a new upgraded, intuitive user experience provides clarity on what performance tasks are due and where to find them.</p>
Skills in Performance Reviews (Early Adopter)	Yes	<p>With this enhancement, a new Skills Review section is added to Performance Reviews. The Skills Review section:</p> <ul style="list-style-type: none"> ○ Integrates a users skills profile into performance reviews and updates the skills profile as part of a performance review task. ○ Allows a user's skill proficiency to be rated from within a review. ○ Allows manager/user to add custom questions to the Skills Review section.
Task Central – Bulk Submit (Early Adopter)	Yes	<p>With this enhancement, a new Bulk Actions page allows reviewers to see which reviews are ready to submit and the overall rating for those reviews.</p>
Update Rating Scale in Review Tasks	Yes	<p>With this enhancement, administrators can edit the title and description of a Rating Scale on the Task Administration page. Once saved, the updates appear immediately on the Define Rating Scale page and users can see the updated ratings once they refresh the Review Task .pdf file.</p>

Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Broadbean Integration Location Data Enhancement	N/A	<p>With this enhancement, the Location field in Broadbean is automatically populated with the location information provided in the requisition.</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '23 Release	N/A	The ability to perform Requisition Template data loads using DLW will be deprecated with 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.
Email Templates and Send Email from Manage Candidates Enhancements	Yes	With this enhancement, several updates are now available that benefit administrators, recruiters, and applicants.
Extend Bulk Selection on Manage Candidates Page (Early Adopter)	No	With this enhancement, recruiters can select and perform actions for 20 or 50 candidates per page.
Increase Flattened Application Page Limit Per Document	No	With this enhancement, customers can increase the page limit to 20 pages by contacting Global Customer Service (GCS). Once the page limit is increased, recruiters can view up to 20 pages for each uploaded applicant document in a flattened application.
Google is Deprecating Standard Universal Analytics on July 1, 2023	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.
Job Alerts Templates for Mobile-Friendly Career Sites	Yes	With this enhancement, recruiting administrators can assign customized external job alert templates to the mobile-friendly career sites.
Job Alerts on Internal Career Site	Yes	With this release, Administrators can enable job alerts for internal career sites and provide an email template with the appropriate job alert details.
Manage Job Alerts in My Profile	Yes	With this enhancement, candidates can view these alerts, edit them, and unsubscribe in the new My Alerts section on their My Profile page.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Support Break Lines in Comments	Yes	With this enhancement, to make comments easier to read, break lines are supported on the following pages: <ul style="list-style-type: none"> ○ Applicant Profile page - On the Comments tab. ○ Manage Candidates - View Profile page - In the Comments field. ○ Manage Candidates - Request Candidate Feedback pag3
Transferring Offer Letter and CV to Universal Profile	Yes	With this enhancement, the HR administrator can create folders where the candidate's offer letter(s) and resume(s) are automatically uploaded to the user's Universal Profile Snapshot Documents tab on their start date. Documents display an ID number, Upload Date , and Uploaded By information.
Introduce Profile User Phone Tag to Interview and Offer Letter Email Templates	Yes	With this enhancement, a new tag, PROFILE.USER.PHONE can be used in email templates, and when resolved, provides the candidate's phone number in notification emails.

New and Enhanced Permissions for March '23

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

New Permissions

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

Core/General

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 LMS - Certification Transcript Update Load	Grants access to the Certification Transcript Update data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	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 - OLCO Metadata Feed	Grants access to the Online Content Metadata data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Feed	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
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.	
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration
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 ability to view all ratings that are shared with others in addition to the rater. This permission applies to anywhere the ratings are displayed, such as People Matrix and Skills Profile. This permission is intended for indirect managers or non-managers to be able to view rating data for users over which 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

Performance

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

New Report Fields for March '23

This page provides the master list of new report fields for the March '23 release.

Learning

FIELD NAME	SECTION
Valid Until	Certifications
Default Language	Training > Training Details
Original Approval Applied?	Training > Training Details
Multiple Assignments Allowed?	Training > Training Details
Multiple Requests Allowed?	Training > Training Details
Thumbnail URL	Training > Training Details

Performance

FIELD NAME	SECTION
Check-In Meeting Status	Check-Ins
Target Status	Goals Targets > Targets
Task Status	Goals Tasks > Tasks
SMP Task Due Date	Succession Task

Release Notes Updates for March '23

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

Changes made on 21 April 2023:

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Review Task Central (Early Adopter)	Review Task Central (Early Adopter)	Removed "Right to left languages are not supporting during the Early Adopter phase". Right to left languages are now supported.

Changes made on 14 April 2023:

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Review Task Central (Early Adopter)	Review Task Central (Early Adopter)	Updated activation instructions.

Changes made on 17 March 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting 2.0 - Calculated Fields: Nesting for Aggregate Functions	Reporting 2.0 - Calculated Fields: Nesting for Aggregate Functions	Noted that aggregate functions cannot be nested within another aggregate function and aggregate functions can only be nested up to one level with non-aggregate functions (e.g., logical, numeric functions). Also, provided examples.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Accessibility Enhancements - March 2023	Accessibility Enhancements - March 2023	Enhancements that were previously scheduled for a post-release patch are now scheduled for a future release.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
ILT – New Roster (Open Beta)	ILT – New Roster (Open Beta)	<p>Added:Note: <i>For this first phase, customers can access a view-only preview of the newly redesigned Session Roster main page in their Stage environments. The actions on this page are not yet available during this phase of the Open Beta. Other pages, such as the Attendance and Scoring page and the Waitlists page are not yet available to preview. Administrators and instructors can switch between the current Session Roster page and the redesigned Session Roster page preview by clicking a link in the top right corner of the Session Roster page.</i></p>
ILT Roster – New User Interface (Early Adopter)	ILT Roster – New User Interface (Early Adopter)	<ul style="list-style-type: none"> ○ Removed:Note: <i>For this first phase, customers can access a view-only preview of the newly redesigned Session Roster main page in their Stage environments. The actions on this page are not yet available during this phase of the Open Beta. Other pages, such as the Attendance and Scoring page and the Waitlists page are not yet available to preview. Administrators and instructors can switch between the current Session Roster page and the redesigned Session Roster page preview by clicking a link in the top right corner of the Session Roster page.</i> ○ Added: Note: <i>For smaller screens, under Display Orientation, select 100% Scale & Layout instead of the recommended settings.</i>

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Competency Experience Improvements	Competency Experience Improvements	Clarified the criteria for deleting a user from a learning object-based observation checklist.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Increase Flattened Application Page Limit Per Document (Beta)	Increase Flattened Application Page Limit Per Document (Beta)	Added (Beta) to the title and added information for beta participation.

Changes made on 13 March 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Capability Model Targets	View Skill Proficiency Targets and Gaps	Clarified how critical skill predicted proficiency ratings are calculated.
People Matrix - Manager Mode	Create a People Matrix	Clarified how predicted proficiency ratings are calculated.
XLS to XLSX Output Format Upgrade - Most-Used Standard Reports	XLS to XLSX Output Format Upgrade - Most-Used Standard Reports	Noted that the change from a 24-hour format to a 12-hour format is only for the English (US) language; all other geographies continue to show in their respective regional format:

Changes made on 8 March 2023:

Content Studio

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Content Studio	Content Studio	This is a new feature for Cornerstone Content customers.

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting 2.0 - Calculated Fields: Additional Validations	Reporting 2.0 - Calculated Fields: Additional Validations	Clarified that calculated field validations have existed previously. This feature enhancement expands the types and scope of validations performed. Added an example validation scenario.
Reporting 2.0 - Calculated Fields: New Operators to Include Both NULL and Empty Strings	Reporting 2.0 - Calculated Fields: New Operators to Include Both NULL and Empty Strings	Renamed BLANKVALUE to IFNULL and ISBLANK to ISNULL.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Versioning Redesign Enhancements (Early Adopter)	Versioning Redesign Enhancements (Early Adopter)	Changed Open-Beta to Early Adopter.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Bulk Reopen Performance Review Steps (Early Adopter)	Bulk Reopen Performance Review Steps (Early Adopter)	Added the following: Bulk reopen is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.
Review Task Central (Early Adopter)	Review Task Central (Early Adopter)	Updated the Implementation section.
Skills in Performance Reviews (Early Adopter)	Skills in Performance Reviews (Early Adopter)	Added the following: Skills in performance reviews is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.
Task Central – Bulk Submit (Early Adopter)	Task Central – Bulk Submit (Early Adopter)	Added the following: Bulk submit is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.

Changes made on 1 March 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Learning Load Enhancements (Training Loads)	Edge Import - Learning Load Enhancements (Training Loads)	Added a new ILT Session Load enhancement. When the unique identifier is set to "Unique Session ID across all Events," the Event ID is only required when creating new sessions.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Email Templates and Send Email from Manage Candidates Enhancements	Email Templates and Send Email from Manage Candidates Enhancements	Added in the Consideration section:Usera can only view contents of Standard Internal/External Job Alert templates.
Email Templates and Send Email from Manage Candidates Enhancements	Email Templates and Send Email from Manage Candidates Enhancements	Removed: These features are not available during UAT.

Changes made on 24 February 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import Framework - Download Original File Uploaded	Edge Import Framework - Download Original File Uploaded	<p>The link to download the file is accessible even if you were not the person who originally uploaded the file.</p> <p>The link respects the existing <i>Download Reports Access when portal opts-in for Restrict reports access - Edge Import</i> permission which is available via a backend setting. If this permission is enabled, then only users who have this permission can download the file.</p> <p>The link to download the file is only available for 30 days.</p>

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting 2.0 - Chart Color Preferences for Shared Users in Reporting 2.0	Reporting 2.0 - Chart Color Preferences for Shared Users in Reporting 2.0	This enhancement also applies to dashboards.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Curriculum Player 2.0 – Milestone 2 (Open Beta)	Curriculum Player 2.0 – Milestone 2 (Open Beta)	Added: This enhancement is available in Stage on February 16th.
Express Class Definable Training Time	Express Class Definable Training Time	Updated the "To define training time" procedure.
SCORM 1.2 Embedded Videos to Play Full-Screen	SCORM 1.2 Embedded Videos to Play Full-Screen	Added: This functionality will be available with the UAT3 stage deployment.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Bulk Reopen Performance Review Steps (Early Adopter)	Bulk Reopen Performance Review Steps (Early Adopter)	Removed Starter Guide link. There is no starter guide for this project.
<ul style="list-style-type: none"> ○ Check-Ins Usability Enhancements ○ Check-Ins Meeting Statuses ○ Check-In Personal Notes 	<ul style="list-style-type: none"> ○ Check-Ins Usability Enhancements ○ Check-Ins Meeting Statuses ○ Check-In Personal Notes 	Added: This enhancement is available in Stage on February 16th.
Review Task Central (Early Adopter)	Review Task Central (Early Adopter)	Added link to Starter Guide.

Changes made on 22 February 2023:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Stripe – Payment Gateway	Stripe – Payment Gateway	Removed Starter Guide information. There is no Starter Guide for the Stripe enhancement.
SCORM 1.2 Embedded Videos to Play Full-Screen	SCORM 1.2 Embedded Videos to Play Full-Screen	Added: This functionality will be available with the February 23 stage deployment (UAT 2).

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
<ul style="list-style-type: none"> ○ Check-Ins Usability Enhancements ○ Check-Ins Meeting Statuses ○ Check-In Personal Notes 	<ul style="list-style-type: none"> ○ Check-Ins Usability Enhancements ○ Check-Ins Meeting Statuses ○ Check-In Personal Notes 	Updated Stater Guide links.

Changes made on 17 February 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
OK Button Removed from SSO Timeout, Logout, and Error Pages	OK Button Removed from SSO Timeout, Logout, and Error Pages	New enhancement added.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Curriculum Player 2.0 - Milestone 2 (Open Beta)	Curriculum Player 2.0 - Milestone 2 (Open Beta)	Updated the activation instructions.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Succession	Reporting Fields - Succession	Incorrect fields were listed.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Email Templates and Send Email from Manage Candidates Enhancements	Email Templates and Send Email from Manage Candidates Enhancements	Added: These features are not available during UAT.

Changes made on 16 February 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Learning Load Enhancements (Transcript Loads)	Edge Import - Learning Load Enhancements (Transcript Loads)	Inadvertently included release notes from November '22 Release. Updated with the correct release notes from March '23 Release.

31 March Patch Release Functionality

What's New for the 31 March 2023 Patch Release

The following is released along with the 31 March 2023 patch release:

MODULE	FEATURE	DESCRIPTION
Content Studio	Content Studio - Overview	Content Studio is available for global customers with Content subscriptions.
Recruiting	Email Templates and Send Email from Manage Candidates Enhancements	<p>Updated version of Rich Text Editor is not available as follows:</p> <ul style="list-style-type: none"> ○ Recruiters can send emails using HTML Source Code ○ Preview and Source Code options are part of the tool bar at the top ○ Preview and Source Code open up in a separate popup

Content Studio - Overview

Content Studio is a content discovery, curation, and insights platform that helps customers explore Cornerstone's content offerings before making any purchasing decision. Prior to this application, finding, procuring content from multiple vendors, and getting engagement on right content was challenging for an organization.

Content Studio helps in curating highly effective and engaging content along with insights to drive success. It is driven by AI powered search and consumption metrics which uses comprehensive filters to identify the best content that fits organizational needs. Content Studio is a companion application to Cornerstone CSX, and it can be accessed with a single click without having to manage a separate login.

How Does Content Studio Benefit My Organization?

Content Studio allows curators and administrators to do the following:

- Quickly and easily access Content subscriptions along with proprietary content from their CSX course catalog in a single unified, intuitive user interface.
- Publish curated content collections as playlists in their CSX portal.
- Collaborate with other curators to review and optimize the quality of collections.
- Content Studio is not available in Stage or Pilot environments.

Implementation

Content Studio is automatically enabled for existing Cornerstone Content customers. Content Studio is also available for purchase for non-content customers. The *Content Studio* role is assigned to System Administrations for qualifying content customers. Administrators with access will see Content Studio under the Content navigation tab.

Content Studio is available with the March '23 Release for US customers in LAX swim lanes with Content subscriptions, and in the March 31 post-release patch for global customers with Content subscriptions.

Content Studio is only available in Production environments.

For this initial launch, Content Studio is not available for Life Science customers or customers located in swim lane 4. Content Studio is only available in Production environments.

Access

When Content Studio is enabled, access to Content Studio is controlled by the *Access Content Studio* permission or by assigning users to the new *Content Studio* security role. The *Playlist - Create* permission is needed to publish collections as playlists in CSX portals.

To access Content Studio, go to [CONTENT > CONTENT STUDIO](#). Then, select the **Content Studio** link. Content Studio opens in a new browser tab or window.

Permissions

The following permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Content Studio	Grants ability to access Content Studio from the Cornerstone CSX application. This permission cannot be constrained. This is an administrator permission.	System Administration
Playlists - Create	Grants ability to create private Learning Playlists. This permission cannot be constrained. This is an end user permission.	Learning - Administration

Email Templates and Send Email from Manage Candidates Enhancements

Prior to this enhancement, job alert emails were sent using a generic template that did not allow customer branding.

With this enhancement, several updates are now available that benefit administrators, recruiters, and applicants.

- Administrators can now:
 - Create, edit, activate, deactivate, and delete Internal and External Job Alert Templates.
 - Use custom templates to configure emails for Manage Candidates.
 - Configure display names fields in the job alert templates.
 - Request that Global Customer Support (GCS) configure email address subdomain.

To access and configure email templates, administrators can go to [ADMIN > RECRUIT > EMAIL TEMPLATES](#).

- Recruiters can now:
 - Use their organization/portal name in the email address as subdomain for branding purpose. For example, if the portal name is *shopnow*, the default subdomain email address is: **jsmith@shopnow.recruitmail.com**
 - Use html source code to send email from the Manage Candidates page.
 - Use the Rich Text Editor (RTE) to preview email and view source code.
- Candidates now receive customized emails that contain a subdomain email address, if applicable.

To manage templates, recruiters can go to [MANAGE CANDIDATE > SELECT ANY CANDIDATE > SEND EMAIL](#). Then choose the appropriate template.

How Does this Enhancement Benefit My Organization?

This enhancement allows customers to configure their own Job Alert templates to align with their brand. Adding a subdomain address helps candidates identify that the email is from a trusted source.

Considerations

- Users can only view contents of Standard Internal/External Job Alert templates.
- Only active templates can be associated to career sites.
- A template assigned to any career site cannot be deleted.
- To create a job alert, the template category must be Internal Job Alert or External Job Alert.
- The domain “recruitmail” cannot be configured.
- By default, the subdomain is set with the portal name. Contact Global Customer Support (GCS) to change the subdomain . **Note:** *English letters, numbers and hyphens (not at the start or end) are acceptable for subdomain names.*

- Localization:
 - When creating a template, create a default language template first, followed by other language templates.
 - Templates display based on the language of the logged-in user. If a template is not configured in that language, then the title of the template is displayed in the default language.
 - Activating or inactivating a template applies to the selected template in all languages. It is not possible to activate/inactivate a template in a specific language only.

Implementation

- This functionality is automatically enabled for all organizations using the Recruiting module.
- At this time, customers on SL4 environment cannot receive emails sent from Job Alerts on Mobile-Friendly Career Site.

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. This permission cannot be constrained. This is an administrator permission.	Recruiting

Note: This permission is enabled by default for Recruiting Admin, Cornerstone Admin, and System Admin roles for all customers.

14 April Patch Release Functionality

What's New for the 14 April 2023 Patch Release

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

MODULE	FEATURE	DESCRIPTION
Core/General	Capabilities - Predicted User Proficiency Levels - View Permission	With this patch, the <i>Capabilities - Predicted User Proficiency Levels - View</i> permission is immediately enabled for everyone in all portals to minimize engagement with Cornerstone Global Customer Support.
Performance	Bulk Reopen Performance Review Steps (Early Adopter)	With this enhancement, a reviewer can reopen a review step for one or more reviewees at the same time and provide a reason for reopening the step. Note: <i>Only one step can be opened at a time.</i> Additionally, comments about why someone is reopening are visible in Review Task Central.
Performance	Review Task Central (Early Adopter)	With this enhancement, the new Review Task Central provides reviewers an easy way to view, submit, and calibrate all their assigned steps in one location. Additionally, a new upgraded, intuitive user experience provides clarity on what performance tasks are due and where to find them.
Performance	Skills in Performance Reviews (Early Adopter)	With this enhancement, a new Skills Review section is added to Performance Reviews. The Skills Review section: <ul style="list-style-type: none"> ○ Integrates a users skills profile into performance reviews and updates the skills profile as part of a performance review task. ○ Allows a user's skill proficiency to be rated from within a review. ○ Allows manager/user to add custom questions to the Skills Review section.
Performance	Task Central – Bulk Submit (Early Adopter)	With this enhancement, a new Bulk Actions page allows reviewers to see which reviews are ready to submit and the overall rating for those reviews.

Review Task Central (Early Adopter)

With this enhancement, the new Review Task Central provides reviewers an easy way to view, submit, and calibrate all their assigned steps in one location.

Additionally, a new upgraded, intuitive user experience provides clarity on what performance tasks are due and where to find them.

Once an administrator enables this feature, users can use Task Central to:

- Filter review status
- Search for reviewees by name
- View all previous off-cycle tasks

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 Review Task Central is activated, it cannot be reverted.

Tasks created before activation remain the legacy format. Tasks created after activation appear with a green check-mark next to their name in the Task Administration screen.

Once enabled, all the following changes and features apply.

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 new status as follows:

- 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 represent 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.

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

Reviewers 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.

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”.
- During the early adopter period, Review Task Central does not support the following:
 - Discuss or decline review functionality for off-cycle tasks.
 - Review previews.
- During the early adopter period, only the following links are available under the options menu in the review:
 - Add co-planner
 - Attachments
 - Employee details
 - Print review
- Review Task Central only supports review step assigned and step due emails.
- Tags in Task Administration cannot be used for Task Central/

Implementation

- Self-Activation: Prior to the April 14 patch, Review Task Central can be activated in the stage environment via the “Activate Review Task Central” button on the Performance Review Task Administration screen. If a stage portal had previously activated Review Task Central, it will remain active in those portals – they will not have to self-activate again. Review Task Central is not available in production and pilot environments until the April 14 patch.
- With the April 14 patch: Review Task Central can be enabled using a new Feature Activation page available via the Admin > Tools > Performance Management navigation path. The button to activate Review Task Central will be available in the new Feature Activation page. A new permission will be added to the System Administrator role to control access to this page. Stage portals that had previously enabled Review Task Central will not have to re-enable it again – it will remain active if previously enabled in stage.

Once enabled, Review Task Central cannot be disabled. Once enabled, all tasks created post-enablement will use the new Review Task Central user interface (UI). Tasks that are using the new Review Task Central UI will have a green check mark next to the name of the task.

Permissions

The following new permission applies to this functionality:

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

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who have this permission and are within the Admin Visibility settings can view the task, edit the task, add users, and view the task	Performance - Administration

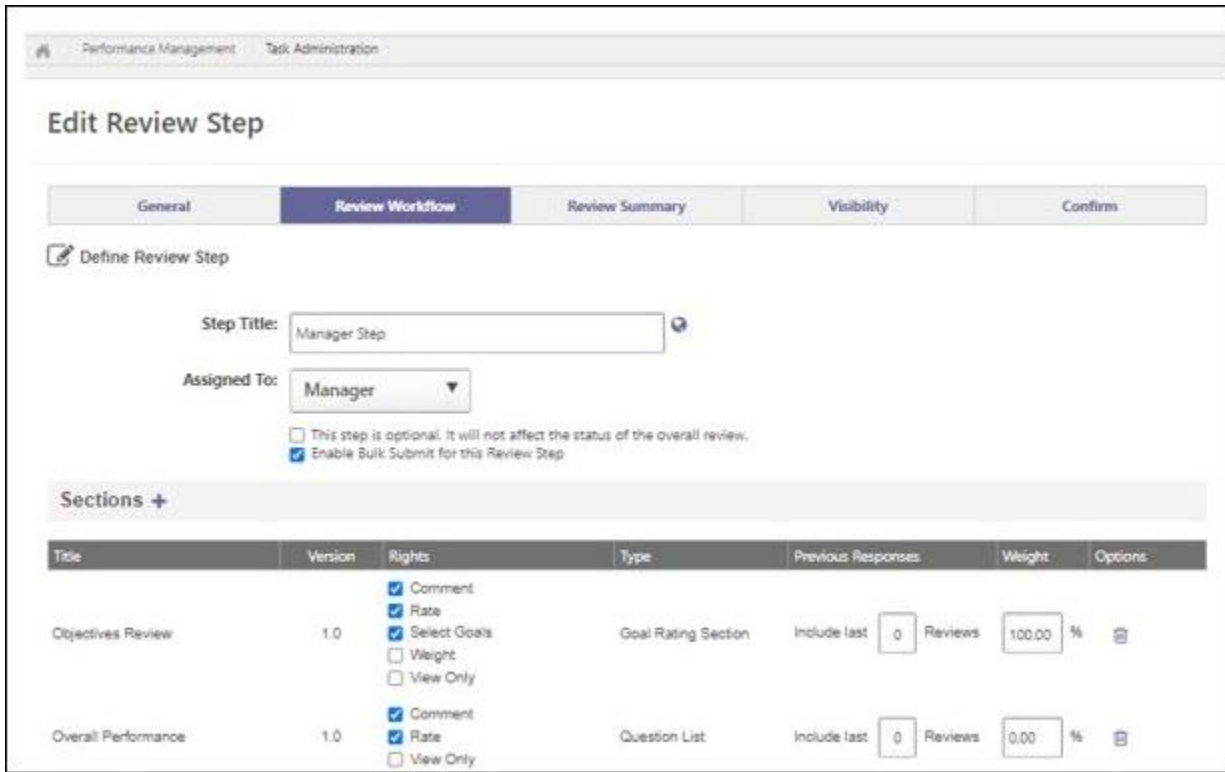
	<p>details. However, the admin cannot edit the Admin Visibility settings for the task. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The constraints on this permission control which users can be added to the task.</p>	
<p>Performance Review Task Administration</p>	<p>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.</p>	<p>Performance - Administration</p>

Task Central – Bulk Submit (Early Adopter)

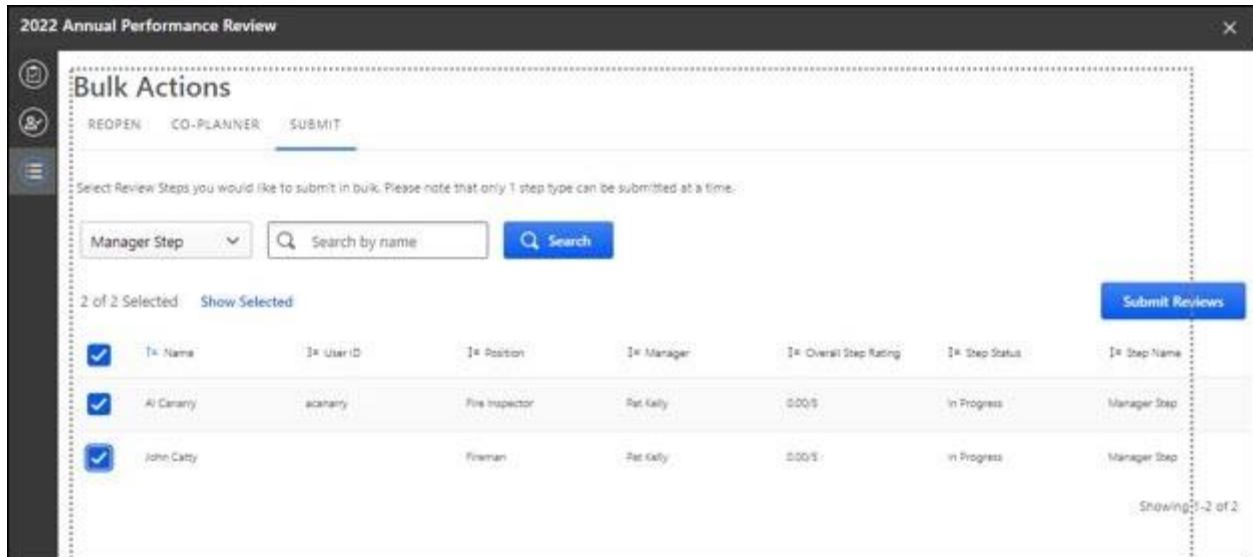
Prior to this enhancement, managers were able to submit one review step per reviewee, which was inefficient and did not allow the manager to check their work or ensure cross-team equity before submitting the review.

With this enhancement, a new Bulk Actions page allows reviewers to see which reviews are ready to submit and the overall rating for those reviews.

Administrators enable bulk submission by going to [PERFORMANCE MANAGEMENT > TASK ADMINISTRATION](#) and selecting the Review Workflow tab. In the Define Review Step section, click the **Enable Bulk Submit for this Review Step** check-box.



Once bulk submit is enabled, the Bulk Submit tab displays on the Bulk Actions Page in Task Central.



To bulk submit:

1. Click the **Submit** tab to view all available reviews.
2. Select a review step. This enables the selection check-boxes.
3. Select one or more reviews to submit.
4. Click **SUBMIT REVIEWS**. A notification message appears.

Once processing is done, a success message, a partial success message, or a failed message appears.

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.

How Does this Enhancement Benefit My Organization?

Reviewers can clearly see what steps are not complete and informally calibrate reviews before submission.

Considerations

- Bulk Submit supports 1,000 users per bulk submit action.
- 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.

Implementation

Bulk Submit is only available to customers who activate Task Central.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who 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
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

Bulk Reopen Performance Review Steps (Early Adopter)

Prior to this enhancement, a reviewer 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, a reviewer can 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.* Additionally, comments about why someone is reopening are visible in Review Task Central.

To enable this feature, administrators can go to [PERFORMANCE REVIEW -TASK ADMINISTRATION](#), select the Review Workflow tab, then check the **Allow the Reopener (Manager, Indirect Manager, and any Custom Relationships) to reopen steps** box. This allows the Bulk Actions screen to appear on Task Central.

Once enabled, on the Bulk Actions screen:

1. Select the Reopen tab.
2. Select a step or search for a step and select it.
3. Click the check-boxes for one or more users.
4. Click the **REOPEN STEPS** button. A Reopen Step window opens.
5. In the **Comment for Reviewer** box, enter the reason for reopening this step.
6. Click the **REOPEN STEP** button. The reopen information is displayed in the reopen table, including the comment. **Note:** *During processing, the reviewer cannot navigate away from the page.*

Once processing is done, a success message, a partial success message, or a failed message appears.

The step is reopened and the comment is displayed on Task Central to the appropriate assignees.

How Does this Enhancement Benefit My Organization?

- Reviewers can reopen a review step for multiple reviewees at once, which saves time during the busy review season.
- Assignees can view the reopen reason directly on 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 submit action.

Implementation

This functionality is automatically enabled for all Task central EA customers.

Skills in Performance Reviews (Early Adopter)

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. The Skills Review section:

- Integrates a user's skills profile into performance reviews and updates the skills profile as part of a performance review task.
- Allows a user's skill proficiency to be rated from within a review.
- Allows manager/user to add custom questions to the Skills Review section.

Administrators can enable this 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 COMPONENT** button appear.

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.

Note: *Review Task Central must be enabled to use Skill Assessment.*

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.
- 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 for 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

Capabilities - Predicted User Proficiency Levels - View Permission

In March, Cornerstone released two major skills projects that use the Predicted Proficiency service: People Matrix and Capability Model Targets. Customers were experiencing issues with these features as a permission (*Capabilities - Predicted User Proficiency Levels - View*) was added for the service but was only enabled for administrators. It is not evident that customers should be enabling the permission in order to take advantage of the functionality.

With this patch, the *Capabilities - Predicted User Proficiency Levels - View* permission is immediately enabled for everyone in all portals to minimize engagement with Cornerstone Global Customer Support.

Permissions

The following existing permission applies 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

Security Roles

Upon release, the *Capabilities - Predicted User Proficiency Levels - View* permission is automatically granted to the Default Role for Every User in the System role.

Content Anytime - Q1 and Q2 Updates

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

Target dates for Q1 and Q2 refreshes are listed below. Please refer to the [2023 Content Refresh Calendar](#) for the timing of refreshes for all of 2023.

- January 6 - January 13: Additions Only
- February 3 - February 10: Additions Only
- March 10 - March 17: Additions and Q1 Removals
- April 7 - April 14: Additions Only
- May 5 - May 12: Additions Only
- June 2 - June 9: Additions and Q2 Removals

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 - Overview

Content Studio is a content discovery, curation, and insights platform that helps customers explore Cornerstone's content offerings before making any purchasing decision. Prior to this application, finding, procuring content from multiple vendors, and getting engagement on right content was challenging for an organization.

Content Studio helps in curating highly effective and engaging content along with insights to drive success. It is driven by AI powered search and consumption metrics which uses comprehensive filters to identify the best content that fits organizational needs. Content Studio is a companion application to Cornerstone CSX, and it can be accessed with a single click without having to manage a separate login.

How Does Content Studio Benefit My Organization?

Content Studio allows curators and administrators to do the following:

- Quickly and easily access Content subscriptions along with proprietary content from their CSX course catalog in a single unified, intuitive user interface.
- Publish curated content collections as playlists in their CSX portal.
- Collaborate with other curators to review and optimize the quality of collections.
- Content Studio is not available in Stage or Pilot environments.

Implementation

Content Studio is automatically enabled for existing Cornerstone Content customers. Content Studio is also available for purchase for non-content customers. The *Content Studio* role is assigned to System Administrations for qualifying content customers. Administrators with access will see Content Studio under the Content navigation tab.

Content Studio is available with the March '23 Release for US customers in LAX swim lanes with Content subscriptions, and in the March 31 post-release patch for global customers with Content subscriptions.

Content Studio is only available in Production environments.

For this initial launch, Content Studio is not available for Life Science customers or customers located in swim lane 4. Content Studio is only available in Production environments.

Access

When Content Studio is enabled, access to Content Studio is controlled by the *Access Content Studio* permission or by assigning users to the new *Content Studio* security role. The *Playlist - Create* permission is needed to publish collections as playlists in CSX portals.

To access Content Studio, go to [CONTENT > CONTENT STUDIO](#). Then, select the **Content Studio** link. Content Studio opens in a new browser tab or window.

Permissions

The following permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Content Studio	Grants ability to access Content Studio from the Cornerstone CSX application. This permission cannot be constrained. This is an administrator permission.	System Administration
Playlists - Create	Grants ability to create private Learning Playlists. This permission cannot be constrained. This is an end user permission.	Learning - Administration

Core/General

Capabilities Enhancements

Capabilities Experience Improvements

With this enhancement, small but meaningful improvements are made to the Skills interface and experience that provide visual cues and information, making interactions more intuitive and providing richer details about how the functionality works.

The following enhancements are included with this release:

- A new status message confirms the addition and removal of skills from the Skills Profile
- Updated icons are more intuitive to provide better context for hidden skills
- Ability to add a skill from another user's Skills Profile
- "Skills You Might Have" tooltip explains which data is used to provide suggestions
- For administrators
 - Proficiency level number displayed in Proficiency Levels preferences
 - View skill history when editing the skill in the Capabilities Library
 - Search by ID in the Capabilities and Capabilities Model Libraries
 - Filters persist in the Capability and Capabilities Models libraries after edit

Confirmation Message When Adding or Removing Skills on Skills Profile

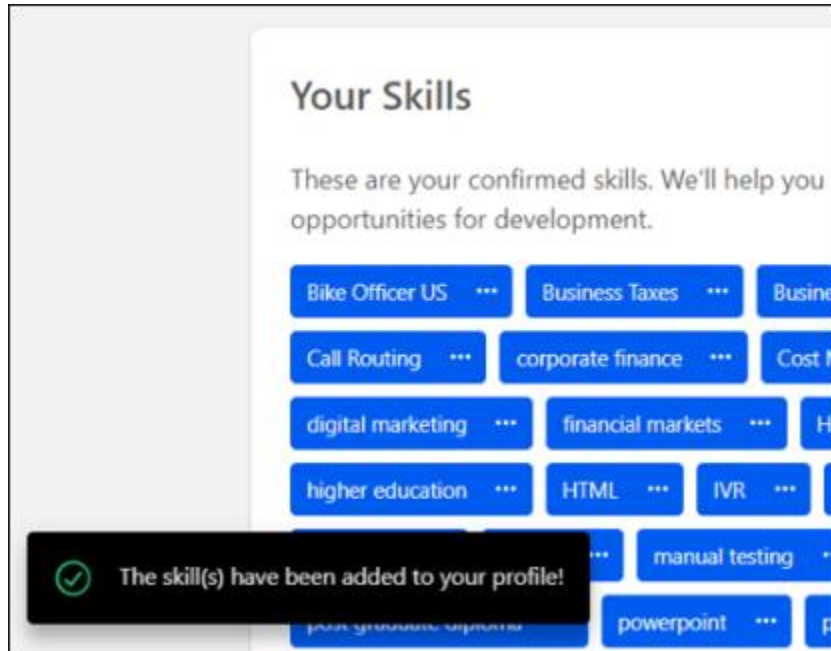
When adding or removing a skill from the Skills Profile, a status message is displayed to confirm the action. The message appears temporarily in the lower-left corner of the screen.

A confirmation message appears in the following scenarios on the Skills Profile:

1. Adding or removing skills.
2. Adding skills to develop.
3. Removing skills.
4. Hiding a recommended skill.

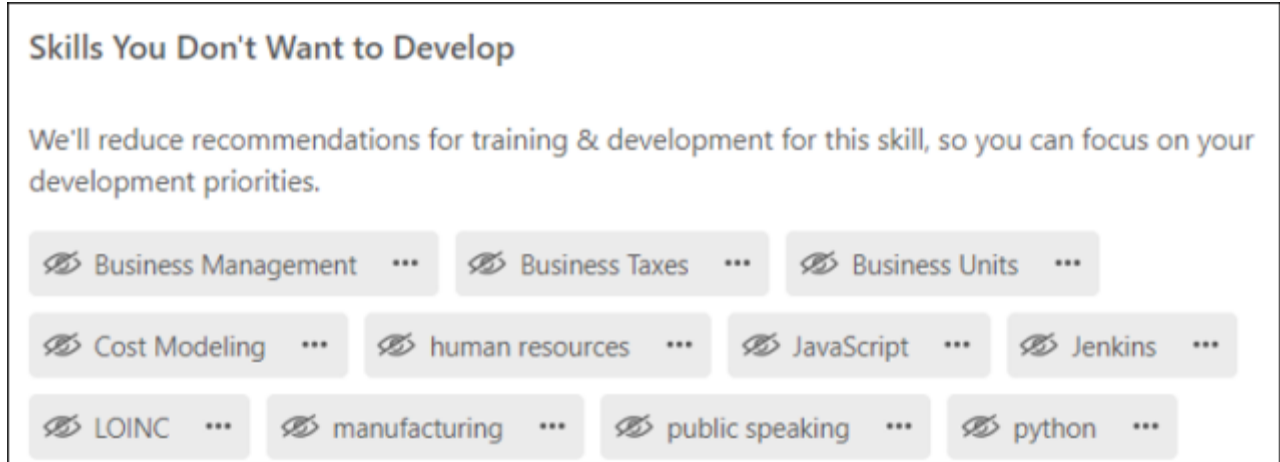
A confirmation message appears in the following scenarios on the Manage Skills flyout:

1. Adding skills.
2. Adding skills to develop.
3. Adding skills you do not want to develop.



Updated Icon for Skills You Don't Want to Develop

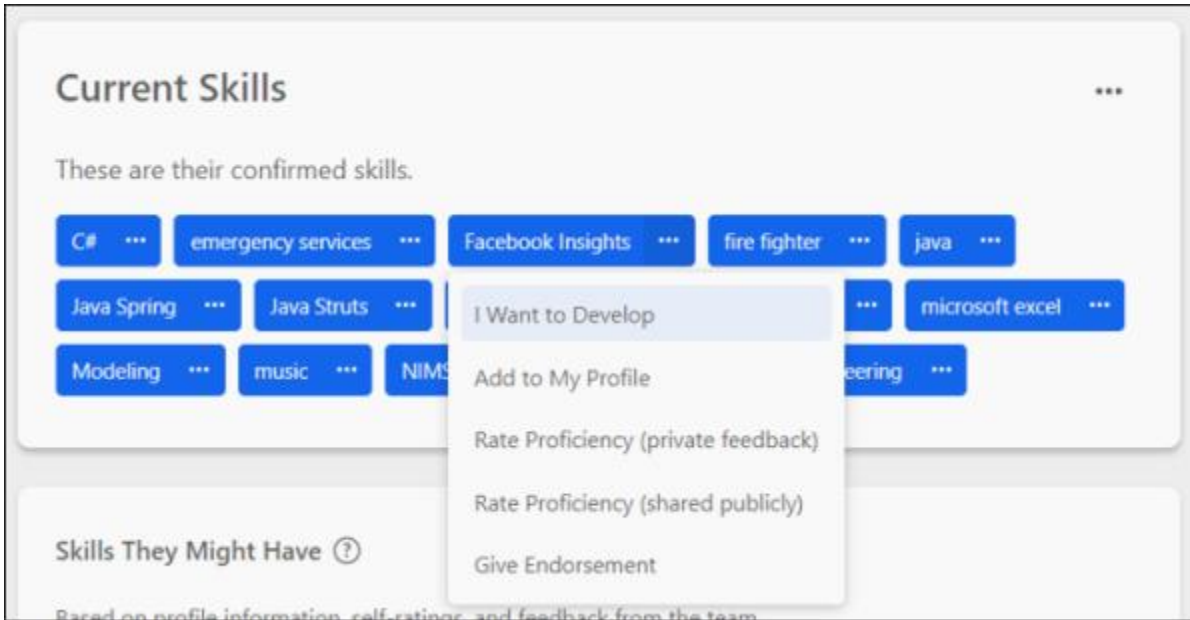
The icon that is displayed next to a skill that you do not want to develop is updated to be more intuitive. The icon was previously an eye, and it is now an eye with a diagonal line across it. This icon appears on the Skills Profile, Skills Wizard, and Manage Skills flyout.



Add a Skill from Another User's Skills Profile

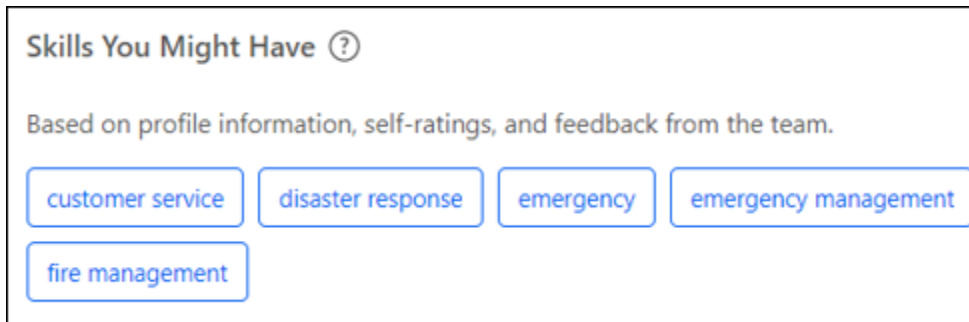
When viewing another user's Skills Profile, you now have the option to add a skill from their profile to your profile. Within the skill menu, two new options are available when viewing another user's Skills Profile:

1. I Want to Develop - This option adds the skill to your profile as a skill you want to develop.
2. Add to My Profile - This option adds the skill to your profile as a skill you have.



Tooltip Added for "Skills You Might Have"

A tooltip is added to the Skills You Might Have section of the Skills Profile. Selecting this tooltip displays an explanation of which data is used to generate suggested skills.



Skills You Might Have ✕

How are suggested skills generated?

Skills are suggested based on your profile details, and information about your position. You can use these skill suggestions to identify skills you want to develop, declare skills for which you're already proficient, or hide skills you're not interested in developing.

The following information is used to try to find the most relevant skills:

- Current and past positions, including the position title, description, responsibilities and competencies
- Profile bio
- CV text
- Subjects and Interests
- Elective training completed

Suggested skills offer a starting point for building your profile, but you can also search for additional skills by clicking the Add icon in the relevant section.

Proficiency Level Number Added to Proficiency Level Preferences

In Proficiency Level Preferences, a Level column is added to the table of proficiency levels. This column displays the numeric level value associated with each level. The first proficiency level value is one.

Level	Range	Name	Description
1	0.1-25%	Basic Lowest	Uses basic understanding of the field to perform job duties; may need some guidance on job duties; applies learning to recommend options to address unusual situations.
2	25.1-50%	Working	Successfully completes diverse tasks of the job; applies and enhances knowledge and skill in both usual and unusual issues; needs minimal guidance in addressing unusual situations.
3	50.1-75%	Extensive	Performs without assistance; recognized as a resource to others; able to translate complex nuances to others; able to improve processes; focus on broad issues.
4	75.1-100%	Expert	Seen as an expert; guides, troubleshoots; has strategic focus; applies knowledge and skill across or in leading multiple projects.

View Skill History in Capabilities Library

When editing a skill in the Capabilities Library, two additional values are displayed next to the Capability ID:

1. Created - This displays the date on which the skill was created and the name of the creator.
2. Modified - This displays the date on which the skill was last modified and the name of the modifier.

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-890	4/19/2021 by Cornerstone Admin	1/12/2023 by Cornerstone Administrator

* Name

customer focus 🌐

14 / 250

Search Capabilities by ID

When searching for capabilities in the Capability Library and Capability Model Library, administrators can now search by ID. Searching by ID only returns exact matches. For example, if an administrator searches for "27765," the results will not return SKL-27765; the results will only include a capability with an ID of 27765. Previously, administrators could only search by name.

Manage Capabilities
Filters

Last Modified - Newest
▼

✕

Create

Status	ID	Name	Source	Created	Modified	
Active	SKL-27765	product management	Cornerstone Skills Graph	8/19/2022 by Cornerstone Administrator	8/19/2022 by Cornerstone Administrator	Edit ...

1-1 of 1

Filters Persist in the Capability Library and Capability Models Library After Editing

Previously, when an administrator set filter in the Capability Library or Capability Models Library and then edited an item, the Status, Source, and Linked Status filters were removed after editing the item and returning to the Library page. The keyword search, sort, and pagination parameters were retained.

With this enhancement, any settings for the Status, Source, and Linked Status filters remain set after editing an item in the Capability Library or Capability Models Library. This enables administrators to edit multiple items without having to set their filters each time.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Capability Models Library - Edit	Grants ability to access the Capability Models Library and create and edit Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Capability Models Library - Manage	Grants ability to access the Capability Models Library and create, edit, and deactivate Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
Capability Library - Edit	Grants 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 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

Capability Preferences - Manage	Grants 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
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Capability Model Targets

Capability Model Targets

With this enhancement, administrators can set proficiency level targets for all users or for specific organizational units. When capability model targets are set, users see targets in a table in the Skills Profile outlining their critical skills, proficiencies, targets, and status. In instances where a user is aligned to multiple models with different target levels, the highest proficiency target is shown.

How Does this Enhancement Benefit My Organization?

When creating a model, administrators can specify target proficiency levels for critical skills to help users understand their requirements and skill gaps for their roles, allowing them to plan their development towards meeting expectations and being successful.

Implementation

This functionality is automatically enabled for all organizations.

The option to define capability targets is controlled by a new setting when creating or editing a capability model. This setting is disabled by default for all models.

The proficiency levels that are available when setting proficiency targets are configured in Capability Preferences > Proficiency Levels.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Capability Models Library - Edit	Grants ability to access the Capability Models Library and create and edit Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Capability Models Library - Manage	Grants ability to access the Capability Models Library and create, edit, and deactivate Capability Models. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Capability Preferences - Manage	Grants 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
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Create a Capability Model with Targets

When creating or editing a capability model, administrators can now enable and define target proficiency levels for capabilities in a model. The target proficiency level represents the proficiency level that is required for the capability model. Administrators may define target proficiency levels for all users in the organization or for specific organizational units (OUs).

The proficiency levels that are available when setting proficiency targets are configured in Capability Preferences > Proficiency Levels.

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

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

Permissions

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

Capability Targets

Define Capability Targets

Target proficiency levels can be set for all capabilities added to the model. A single target level can be defined for all users, or more specific targets can be set across selected Organizational Units. You can use this to set different target levels between similar audiences, such as junior or senior roles, or differ targets slightly for similar roles in the same division or job families without having to define multiple models.

Set capability targets for:

All Users

Specific OUs

Note: If a single user matches across multiple OU types, the highest proficiency level will be used as their target.

Capability	Target Proficiency Level
Agile Methodologies	High
Databases	Medium
Java Script	High
React Javascript Framework	High
Software Design	Medium
SQL	Medium

Suggested Expert

Enable Capability Targets

When creating a capability model, capability targets are disabled by default. To enable capability targets for the competency model, enable the **Define Capability Targets** toggle.

Set Capability Targets for All Users

To set the same capability targets for all users who are included in the capability model, select **All Users** in the **Set capability targets for** field.

When this option is selected, a single set of sliders are available with one slider for each capability. Select the target proficiency level for each capability. The selected targets are applied to all users in the capability model.

Set Capability Targets for Specific OUs

To set different capability targets for each organizational unit associated with the capability model, select **Specific OUs** in the **Set capability targets for** field.

When this option is selected, each organizational unit associated with the capability model will have a distinct set of sliders to set specific targets for each organizational unit. This method could be used to set a model for an entire department or team with different proficiency levels for different roles within that department or team. Similarly, this method could be used to set a model for a job type but require different proficiency levels for Junior or Senior titles.

View Skill Proficiency Targets and Gaps

When a user belongs to an organizational unit (OU) with an associated capability model, a Your Critical Skills table is displayed on the user's Skills Profile. This table outlines the user's critical skills, their predicted proficiency ratings, targets, and status for the proficiency target. If the user is aligned to multiple competency models with different proficiency targets for the same skills, the highest proficiency target is displayed. If a skill does not have a proficiency target, then it is not displayed in this section.

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.

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

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Your Critical Skills

Skill	Your Proficiency	Expected	Status
Java Development	Expert	Beginner	Above expectations
Accessibility	Expert	Expert	Expectations met
HTML5	Expert	Beginner	Above expectations
Interaction design	Intermediate	Intermediate	Expectations met
Communication	Beginner	Expert	Below expectations
Management	Expert	Expert	Expectations met
Axure	None	Expert	
Branding	None	Intermediate	

New Email Action Type for Skills Rating Feedback Requests

With this enhancement, a new Skills Feedback action type is available in Email Administration, and a new email trigger, “Skills Feedback Requested,” is available for this action type. When active, this email is triggered when a user requests skills feedback. This email can be configured as a reminder or a notification, and it can be sent to Rater (the person whose feedback is requested), Requester (the person requesting the feedback), or a specific user.

The following tags are available for this email trigger:

- PreviewTargetUsers - This displays the names of the target users who are pending responses within the request, up to three users.
- TargetUserCount - This displays a count of how many users are pending feedback in the request.
- PreviewRatedCapabilities - This displays the names of the skills that are pending feedback in the responses, up to three skills.
- CapabilitiesCount - This displays a count of all of the skills that are pending feedback in the request.
- RequestsLink - This includes a link to the skills feedback request.
- RequestName - This displays the name of the request.
- RequesterName - This displays the name of the person requesting feedback.

How Does this Enhancement Benefit My Organization?

A new email action type for Skills Rating Feedback Requests gives administrators the ability to ensure requests for feedback reach the rater on a timely basis.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

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

Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
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People Matrix - Manager Mode

People Matrix - Manager Mode

A new People Matrix feature displays a group of users and their proficiency for a set of capabilities. Managers can configure which users and capabilities are included in the matrix.

The following features are available:

- Create interactive matrices to visualize skills data at the team level
- Set target goals and see how your teams compares with the targets
- Easily review and compare self-ratings, peer ratings, and manager ratings in a single interface
- Proficiency levels are predicted by the AI for declared skills tied to the employee role

People Matrix's "Manager Mode" displays a team's declared skills and targets. Indirect managers and interested parties can be given access to rating data via a new constrainable permission.

Matrices can be easily managed from the home page where you can take advantage of summary metrics before diving into the details. Rating data can be actionable from the matrix; managers can rate employees and peers and data can be exported. Skills-based "Related Learning" recommendations are available for Learning customers.

How Does this Enhancement Benefit My Organization?

Managers and leaders can visualize their team's skills in an interactive matrix, facilitating comparisons, gap analysis, and tools to take action.

Frequently Asked Questions (FAQs)

Do I need to purchase People Matrix to use it?

No, People Matrix is available to CSX customers free of charge for the manager use case.

Does People Matrix work with Edcast?

Not currently. For now, People Matrix relies on the Skills Graph data. As we further integrate the systems, this may become possible.

What features do I need to use the People Matrix?

Only Capabilities is required, but if you want to take advantage of learning recommendations, then the CSX Learning product is needed.

What do I need to get started with the People Matrix?

Ideally, you will have already defined what skills are important to your team and will have baseline data. If you do not have baseline data, you can always add it via the matrix, but you will still need to define what it is you want to track. People Matrix can help in showing you what skills are shared by your team, and what skills they might have based on their roles.

Does the People Matrix support constraints?

Yes, viewers of the People Matrix can be constrained to just their teams, location, division, etc.

Does People Matrix support Capability Models?

No, but it is targeted to be added in a future release.

How are predicted ratings calculated?

Using our skills ontology and job history, Cornerstone has been able to identify what skills are tied to what role, and based on years of experience and rating data, can assign a predicted value for declared skills.

Can I create a matrix for employees that are not my subordinates?

Yes, but unless the rating data is set to public, you may not be able to see it when it is added. To solve for this, users who need access to rating data beyond that of their direct subordinates can be granted the *User Ratings - View All Shared Ratings* permission. This allows them to see ratings that have been shared. This permission can be constrained.

Considerations

- To update ratings via the matrix, customers must enable the feature connectors in the feedback templates.
- Proficiency Levels and Rating Scales can be configured independently. Customers are advised to keep Proficiency Levels and Rating Scales the same to avoid confusion.
- Related Learning requires customers to have purchased the Learning functionality.

Implementation

This functionality is automatically enabled for all organizations.

Access to the People Matrix is controlled by the *People Matrix* and *User Ratings - View All Shared Ratings* permissions. Access to predicted proficiency levels is controlled by the *Capabilities - Predicted User Proficiency Levels - View* permission. When users are granted the *User Ratings - View All Shared Ratings* permission, they are granted access to the specified rating data wherever it is available.

Glossary

- People Matrix - A people matrix displays a group of users and their proficiency for a set of capabilities. Managers can configure which users and capabilities are included in the matrix.

Permissions

The following new 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	Core Administration

	<p>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>	
People Matrix	<p>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.</p>	Core Administration
User Ratings - View All Shared Ratings	<p>Grants ability to view all ratings that are shared with others in addition to the rater. This permission applies to anywhere the ratings are displayed, such as People Matrix and Skills Profile. This permission is intended for indirect managers or non-managers to be able to view rating data for users over which 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.</p>	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Preferences - Manage	<p>Grants 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.</p>	Core Administration
User Rating Templates - Manage	<p>Grants ability to manage feedback templates for capabilities. This permission cannot be constrained. This is an administrator permission.</p> <p>This permission only works when used in conjunction with the User Rating permission.</p>	Core Administration

Security Roles

Upon release, the new *Capabilities - Predicted User Proficiency Levels - View*, *People Matrix*, and *User Ratings - View All Shared Ratings* permissions are automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Capability Feedback Templates - People Matrix Feature Connector

With this enhancement, a new People Matrix feature connector is available to enable for capability feedback templates. To update ratings via the People Matrix, administrators must enable the People Matrix feature connector in the appropriate feedback templates.

Upon release, this toggle is disabled for all existing templates.

To edit a Capability Feedback Template, go to [ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > FEEDBACK TEMPLATES](#). Then, select the **Edit** link to the right of the appropriate feedback template.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage feedback templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration

People Matrix Homepage

People Matrix is a tool to help managers to visualize and better understand the qualifications of people on your team or in your organization. Managers can create multiple matrices to track various skill and employee groups.

The People Matrix Homepage displays a summary of each available people matrix.

To access the People Matrix homepage, go to [SKILLS > PEOPLE MATRIX](#).

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 ability to view all ratings that are shared with others in addition to the rater. This permission applies to anywhere the ratings are displayed, such as People Matrix and Skills Profile. This permission is intended for indirect managers or non-managers to be able to view rating data for users over which 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

People Matrix

A tool to help you visualize and better understand the qualifications of your people.

Hi Aguinaldo!

Let's get you all set up

This Wizard will guide you through setting up the Matrix. You'll need to pick the people you want to see in the Matrix, the skills you want to see in the Matrix and the source of the proficiency data we will use to set the levels.

[Get Started](#)

People Matrix

A tool to help you visualize and better understand the qualifications of your people.

[Create New](#)

Team Matrices (5)

Core Skills Matrix - With Targets Defined

Skills: (11)
Total Employees: (7)

✔ 1 ❗ 2 ⚠ 4

As of: 1/12/2023

Core Skills Matrix - No Targets Define

Skills: (9)
Total Employees: (6)

As of: 10/13/2022

Sales Skills Matrix

Skills: (2)
Total Employees: (3)

✔ 0 ❗ 3 ⚠ 0

As of: 12/6/2022

Customer Service Skills Matrix

Skills: (11)
Total Employees: (3)

✔ 0 ❗ 3 ⚠ 0

As of: 1/4/2023

Information Technology Skills Matrix

Skills: (2)
Total Employees: (3)

✔ 0 ❗ 3 ⚠ 0

As of: 1/11/2023

Create a People Matrix

If no matrices exist, select the **GET STARTED** button to create a matrix.

If one or more matrices exist, select the **CREATE NEW** button to create a matrix.

See **Create a People Matrix** on page 83 *for additional information*.

People Matrix Summaries

The People Matrix homepage displays a summary for each of the people matrices that are available to you. The following information is displayed in the summary for each matrix:

- Matrix Name
- Skills - This displays the number of skills included in the matrix.
- Total Employees - This displays the number of users included in the matrix.
- Proficiency Targets - The proficiency target icons only appear if the matrix includes skills with proficiency targets.
 - Green - The green circle with the checkmark indicates the number of users in the matrix who achieved an Overall Target Achievement score of 100%.
 - Red - The red circle with the exclamation point indicates the number of users in the matrix who achieved an Overall Target Achievement score below 80%.
 - Yellow - The yellow triangle with the exclamation point indicates the number of users in the matrix who achieved an Overall Target Achievement score greater than 80% but less than 100%.
- As of - This displays the date on which the data was last updated.

Create a People Matrix

A people matrix displays a group of users and their proficiency for a set of capabilities. Managers can configure which users and capabilities are included in the matrix.

To create a People Matrix, go to [SKILLS > PEOPLE MATRIX](#).

- If no matrices have been created yet, then select the **GET STARTED** button.
- If at least one matrix has been created, then select the **CREATE NEW** button.

To edit a People Matrix, go to [SKILLS > PEOPLE MATRIX](#). Select the appropriate matrix. From the People Matrix, select the Options menu and select **Edit Matrix**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 ability to view all ratings that are shared with others in addition to the rater. This permission applies to anywhere the ratings are displayed, such as People Matrix and Skills Profile. This permission is intended for indirect managers or non-managers to be able to view rating data for users over which 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

Step 1 - Select Team

On the Select Team step, you can configure the matrix name and select which users are included in the matrix.

Create Matrix

A tool to help you visualize and better understand the qualifications of your people.

Step 1 - Select Team

Choose users to display in the matrix. By default, your team will be pre-selected. The matrix is limited to 1,000 users.

My Team Matrix

☰

<input type="checkbox"/>	Employees: (2)		<input type="checkbox"/>	Include Subordinates
<input type="checkbox"/>	Developer	Type: Position	Parent: Engineering	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Andre Diaz Sales Manager	Type: User	Manager: Charles Cook	<input type="checkbox"/>

The following options are available to help you configure the matrix name and the group of users displayed in the matrix:

1. **Add OUs** - By default, the matrix includes all of the creator's direct reports. Select this button to add users or organizational units to the matrix. The constraints on the *People Matrix* permission determine which users are available to add.
2. **Remove Selected** - To remove users from the matrix, select the checkbox next to the appropriate users, and select the Remove Selected button.
3. **Include Subordinates** - Select this option to include the user's subordinates in the matrix. When this option is selected, the subordinates are only included if they are within the matrix creator's permission constraints. In addition, you must have the necessary permission to view the shared ratings of users in the matrix.

After selecting the appropriate users, select **NEXT** to proceed to the Select Skills step.

Step 2 - Select Skills

On the Select Skills step, you can configure which skills are included in the matrix and the target proficiency level for each skill.

Create Matrix

Step 2 - Select Skills

Select skills that will be displayed on the matrix for your team.

Skills: (1) Proficiency Target Level

data analysis No Target ▾

Team Skills

These are the confirmed skills that are shared by your team.

data analysis communication + Leadership + Budgeting + project planning + staff administration + time management + interpersonal skills + risk assessment + problem solving +

Skills Your Team Might Have

These are skills your team might have based on their profile information, self-ratings, and feedback from others.

leadership + project management + SaaS + disaster recovery + network administration + information technology + marketing + team leadership + business analysis +
information systems +

The following options are available to help you configure the matrix skills:

1. Search and Add Skills - To add a skill, search for the skill and select Add Skill.
2. Remove Selected - To remove skills from the matrix, select the checkbox next to the appropriate skills, and select the Remove Selected button.
3. Proficiency Target Level - From the drop-down, select the target proficiency level for each skill in the matrix. The people matrix will compare each user's skill level with this target level.
4. Team Skills - This section displays the top 10 declared skills that are shared for the people selected in the matrix. Select the plus icon for a skill to add it to the matrix.
5. Skills Your Team Might Have - This section displays the top 10 skills your team may have but the skills have not been declared on your team members' profiles. These skills are identified based on the users' positions and skills identified by other employees with the same position title. Select the plus icon for a skill to add it to the matrix.

After selecting the appropriate skills, select **NEXT** to proceed to the Default Rating Source step.

Step 3 - Add Rating Source and Title

On the Add Rating Source and Title step, you must select the default source of the ratings that should be used for the matrix and provide a title for the matrix. The rating source can be changed at any time when viewing the People Matrix.

Create Matrix

Step 3 - Add Rating Source and Title

Add rating source for the skills you have added and a name for your matrix.

• Select default rating source

Latest Manager Rating

Latest Peer Rating (Average)

Latest Self Rating

Declarations Only

Predicted Proficiency

• Add a title to your matrix

Core Skills Matrix - With Targets Defined 41 / 200

Add a description

Team Matrix with Targets 24 / 1000

The following options are available to help you configure the rating source:

1. Select Rating Source - Select which rating source should be used to display ratings in the matrix. The following options are available:
 - A. Latest Manager Rating
 - B. Declarations Only
 - C. Predicted Proficiency Rating - This option displays each user's predicted proficiency for the skills on the matrix. 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 years of experience in the role. If no value is displayed, it may mean that there is no rating history for the skill or the skill is not normally associated with the role. If a rating is added, a score will be computed and displayed.

2. Add a Title to Your Matrix - Enter a name for your matrix, up to 200 characters. The matrix name should reflect the purpose of the matrix. The name will be displayed on the People Matrix Homepage and the People Matrix page.
3. Add a Description - Enter a description to explain the purpose of the matrix, up to 1000 characters.

After selecting the rating source and providing a title, select **SAVE**. The new matrix is added to your People Matrix Homepage, and you are directed to the newly created People Matrix. Only the matrix creator can view the matrix.

- See **People Matrix Homepage** on page 80 *for additional information*.
- See **People Matrix - Overview** on page 88 *for additional information*.

People Matrix - Overview

The People Matrix displays all of the selected users and their ratings for the selected skills. Only the matrix creator can view the matrix.

To view a People Matrix, go to [SKILLS > PEOPLE MATRIX](#). Then, select the appropriate matrix.

Permissions

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. As of the April 14, 2023 patch, this permission is automatically available in the default role for all users.	Core Administration
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 ability to view all ratings that are shared with others in addition to the rater. This permission applies to anywhere the ratings are displayed, such as People Matrix and Skills Profile. This permission is intended for indirect managers or non-managers to be able to view rating data for users over which 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

My Team Matrix - With Targets

Team Matrix with Targets

Rating Source: Latest Manager Rating

Filter: Employee Skill Proficiency Level

Employee Name	Budgeting	communication	data analysis	interpersonal skills	Leadership	problem solving	project planning	risk assessment
aguinaldo mayorga Area Manager	4	4	5	4	5	4	5	4
Denise Phillips Operations Director	4	4	4	5	4	4	5	Off Target
Ingrid Tomm Information Technology...	4	4	5	4	4	5	Near Target	3
Michael Murphy Information Technology...	4	5	4	5	5		4	3
Richard Martin Production Manager	3	Near Target	3		Off Target			
Timothy Bates Project Manager	5	3	5	Near Target	4	5	4	Off Target
Tony Davis Computer and Information...	4	3	5	Near Target	4	4	5	4

Edit Matrix

To edit the matrix, select the Options menu in the upper-right corner of the page, and select **Edit Matrix**. See [Create a People Matrix](#) on page 83 for additional information.

Delete Matrix

To delete the matrix, select the Options menu in the upper-right corner of the page, and select **Delete Matrix**. This permanently deletes the matrix.

Export Matrix as CSV

To export the matrix and data to a CSV file, select the Options menu in the upper-right corner of the page, and select **Export as CSV**. Each row in the CSV file represents a skill for a user.

Copy Matrix

To copy the matrix, select the Options menu in the upper-right corner of the page, and select **Copy Matrix**. See [Create a People Matrix](#) on page 83 for additional information.

Rating Source

By default, the matrix uses the default rating source configured for the matrix. To view ratings from a different source, select the appropriate source from the **Rating Source** drop-down menu.

Note: *Rating Source is determined by the rater's relation at the time of the rating, regardless of the person's current relation.*

Proficiency Levels and Targets

In the upper-right corner of the page, each of the proficiency levels are displayed with their corresponding name. Viewers can hover over a proficiency level to view a description.

If proficiency targets are configured for the selected skills' capability model, then the following assessments are displayed in the matrix:

- Target Met - This indicates the user's rating is at or above the skill's proficiency target.
- Near Target - This indicates the user's rating is within 80% of the skill's proficiency target.
- Off Target - This indicates the user's rating is less than 80% of the skill's proficiency target.

Filter Users and Skills

The following filters are available:

- Employee Search - Search for a specific user in the matrix. When a search is conducted, the matrix only displays users who match the search criteria.
- Skill Drop-down - Select a specific skill to display. When a skill is selected, only the selected skill is displayed.
- Proficiency Level Drop-down - Select a proficiency level to display. When a proficiency level is selected, only ratings with the selected proficiency level are displayed.

People Matrix Data

The following information is displayed in the People Matrix:

- Employee Name - The first column displays each user who was configured to be included in the People Matrix. The matrix only displays users who are within the viewer's permission constraints.
- Skills and Proficiencies - The matrix displays the user's proficiency level for each of the skills.
 - The proficiencies are based on the selected Rating Source.
 - If a proficiency target is configured for the skill's capability model, then the matrix displays whether the user has met the target, is near the target, or is off the target.
 - On Target - This indicates the user meets or exceeds the target.
 - Near Target - This indicates the user is below the target by one level.
 - Off Target - This indicates the user is below the target by two or more levels.
 - If no proficiency target is configured for the skill's capability model, then the rating circles are shaded to reflect the proficiency level. Higher levels are displayed with a darker color, while lower levels are displayed with a lighter color.

- When Declarations Only is selected as the rating source, a checkmark is displayed if the user has declared the skill. A proficiency assessment is not displayed.
- When Latest Peer Rating is selected as the rating source, if there are multiple ratings from peers for the skill, then the latest average rating is displayed.
- Skill Actions - An Actions menu (three dots) is available by hovering over the skill rating in the matrix. Actions are available based on the rating source and whether the People Matrix feature connector is enabled for the source. The option names may vary as they can be configured in the feedback template. The following actions may be available if configured in the feedback template:
 - Request a Proficiency Rating
 - View Details - Select this option to view the skill details in a flyout. [See Skills Profile - View Skill Details.](#)
 - Update Ratings - Select this to provide a new rating for the user. When a new rating is provided, the matrix displays the new rating. Updating a rating adds a new rating for the user; it does not overwrite the previous rating. [See Skills Profile - Provide Skill Feedback.](#)
 - Other options may be available.
- Average Proficiency Level or Overall Target Achievement Score - This column displays the user's average proficiency rating level for all of the skills in the matrix. The average only includes skills with ratings. When proficiency targets are available, this column displays the number of ratings that are on target. This column is not displayed when the rating source is Declarations Only.

Core/General Enhancements

Accessibility Enhancements

The following accessibility enhancements are included with the March '23 Release:

- **Accessibility Enhancements - Learning**

Copy Down: Grant Access Rights to System Administrator of a Customer Portal

Copy Down: Grant Access Rights to System Administrator of a Customer Portal

With this enhancement, system administrators can more effectively view and manage their portal's copy downs. The new Copy Down administration page enables administrators to do the following:

- View copy down records
- View copy down details and blackout dates
- Cancel copy down requests and provide a cancel reason
- Subscribe and unsubscribe to email notifications

Before canceling any scheduled copy down, it is recommended that system administrators consult with the person who initiated the copy down request.

How Does this Enhancement Benefit My Organization?

System Administrator's ability to view copy down details for their portal improves transparency and reduces the dependency on Cornerstone to share copy down related information. This tool provides self-service ability to cancel a copy down and subscribe to email notifications.

Considerations

The Copy Down tool does not allow system administrators to schedule copy downs.

Implementation

This functionality is automatically enabled for all organizations. The new *Copy Down - Cancel* permission controls access to the Copy Down tool available in Core Functions.

Glossary

- Copy Down - A copy down completely copies your database from one environment to another. Traditionally, this is done from a Production environment to a Stage or Portal environment. It can also occur from Pilot to Stage.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration

Security Roles

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

Copy Down Tool

The Copy Down tool enables system administrators to view copy downs, cancel scheduled copy downs, and subscribe or unsubscribe to email notifications. Only the most recent 60 copy down records can be viewed and exported. **Note:** *The Copy Down tool does not allow administrators to schedule copy downs.*

If there are any copy down request blocks associated with your environment, they are displayed at the top of the page.

All copy down records are displayed in Pacific Standard Time (PST).

To access the Copy Down tool, go to [ADMIN > TOOLS > CORE FUNCTIONS > COPY DOWN](#).

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration

Copy Down

All copy down records are in Pacific Standard Time (PST).

Copy Down Records Receive Email Notifications (cyberu@csod.com) ...

Execution Date & Time (PST)	Completion Date & Time (PST)	Source Environment	Destination Environment	Requestor User	Process ID	Status	
3/22/2023 7:35 PM	-	Production	Pilot	ca@csod.com	20144	Cancelled	View
1/31/2023 8:25 PM	-	Production	Pilot	ca@csod.com	20259	Cancelled	View
1/31/2023 12:00 PM	-	Production	Stage	ca@csod.com	20146	Processing	View
1/30/2023 12:00 AM	-	Production	Pilot	ccd.ca@csod.com	20291	Scheduled	Cancel View
1/18/2023 7:30 PM	-	Production	Pilot	ca@csod.com	20143	Cancelled	View
1/9/2023 12:46 AM	-	Production	Stage	ccd.ca@csod.com	20039	Completed	View
1/9/2023 12:15 AM	-	Production	Pilot			Completed	

Enable or Disable Email Notifications

Use the **Receive Email Notifications** toggle to enable or disable email notifications. See [Enable or Disable Email Notifications for Copy Downs](#) on page 100 *for additional information.*

Export Copy Down Records

To export copy down records to Excel, select the **Export Copy Down Records** option from the three-dot menu icon in the upper-right corner of the Copy Down Records table. [See Export Copy Down Records](#) on page 102 *for additional information*.

Export Blackout Dates

To export the upcoming copy down blackout dates for your environments to Excel, select the **Export Blackout Dates** option from the three-dot menu icon in the upper-right corner of the Copy Down Records table. [See Export Copy Down Blackout Dates](#) on page 101 *for additional information*.

View Copy Down Details

To view the details of a copy down, select the **View** link for the appropriate copy down. [See View Copy Down Details](#) on page 105 *for additional information*.

View Copy Down Blackout Dates

To view the copy down blackout dates, select the **View** link for the appropriate copy down. In the date and time section, select the **View Blackout Dates** link. [See View Copy Down Blackout Dates](#) on page 103 *for additional information*.

Cancel Copy Down

To cancel a scheduled copy down, select the **Cancel** link for the appropriate copy down. [See Cancel a Copy Down](#) on page 99 *for additional information*.

Copy Down Table

The following information is displayed for each completed, scheduled, or cancelled copy down:

- Execution Date and Time - This is always displayed in Pacific Standard Time (PST).
- Competition Date and Time - This is always displayed in Pacific Standard Time (PST).
- Source Environment
- Destination Environment
- Requestor User
- Process ID
- Status - The following statuses are available:
 - Scheduled - The copy down has been scheduled but not started.
 - Processing - The copy down has started and is in progress.
 - Cancelled - The copy down has been cancelled.
 - Completed - The copy down completed successfully.
 - Failed - The copy down failed either partially or completely.

Cancel a Copy Down

Administrators with the appropriate permission can cancel a scheduled copy down from the Copy Down tool. Administrators can cancel any scheduled copy down request, regardless of who created the request.

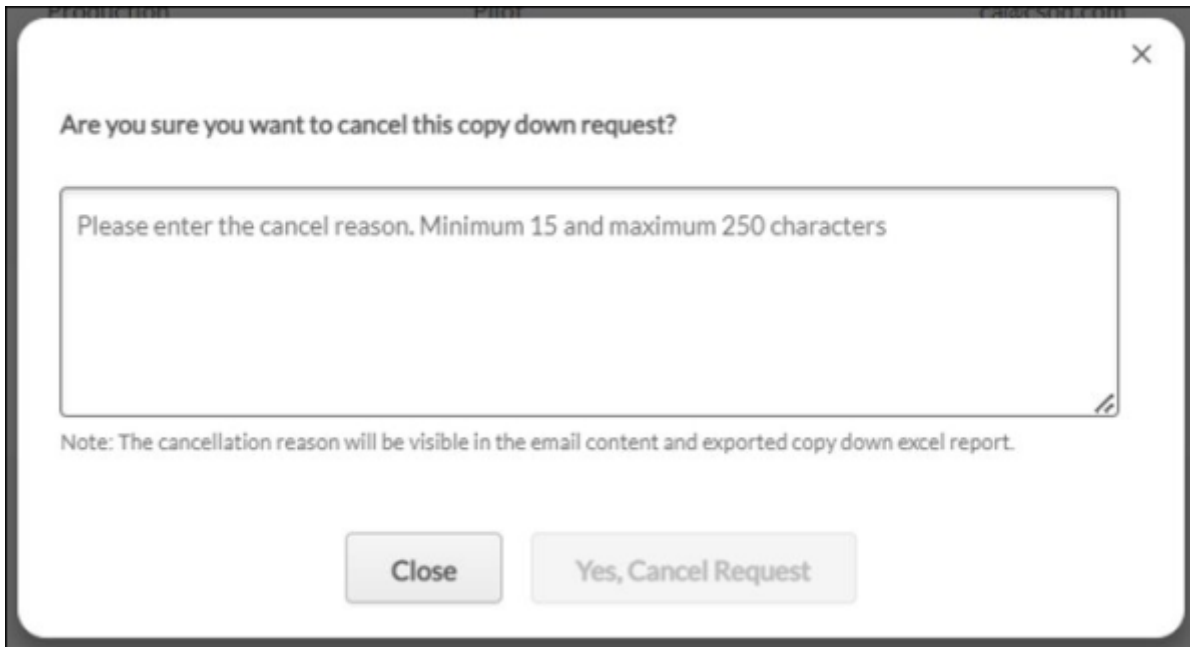
Before canceling any scheduled copy down, it is recommended that administrators consult with the person who initiated the copy down request.

To cancel a copy down, go to [ADMIN > TOOLS > CORE FUNCTIONS > COPY DOWN](#). Then, select the **Cancel** link for the appropriate copy down. This option is only available for scheduled copy downs.

In the pop-up, provide a reason for the cancellation, and select the **YES, CANCEL REQUEST** button. The cancellation reason is included in the cancellation notification email, if enabled.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration



Enable or Disable Email Notifications for Copy Downs

Email notifications may be sent when a copy down is scheduled, modified, or cancelled. When email notifications are enabled, they are sent to the email address associated with the copy down.

To enable or disable the email notifications for copy downs, go to [ADMIN > TOOLS > CORE FUNCTIONS > COPY DOWN](#). Then, enable or disable the **Receive Email Notifications** toggle.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration

Copy Down

All copy down records are in Pacific Standard Time (PST).

Copy down requests are currently blocked on Pilot environment. Please contact authorized person for more details.

Copy Down Records Receive Email Notifications (cyberu@csod.com)

Execution Date & Time (PST)	Completion Date & Time (PST)	Source Environment	Destination Environment	Requestor User	Process ID	Status	
1/9/2023 12:46 AM	-	Production	Stage	ccd.sta@csod.com	20044	Cancelled	View
1/9/2023 12:15 AM	-	Production	Pilot			Cancelled	
12/29/2022 9:45 PM	-	Production	Pilot	ca@csod.com	19976	Scheduled	View
12/21/2022 11:25 PM	-	Production	Pilot	ca@csod.com	19867	Cancelled	View

Export Copy Down Blackout Dates

A copy down blackout date is a date on which a copy down cannot be scheduled. It is important for administrators and organizations to have this information to be able plan their required copy downs accordingly. From the Copy Down tool, administrators can export the upcoming copy down blackout dates for their environments to an Excel file.

To export copy down blackout dates to Excel, go to [ADMIN > TOOLS > CORE FUNCTIONS > COPY DOWN](#). Then, select the three-dot menu icon in the upper-right corner of the Copy Down Records table. Then, select **Export Blackout Dates**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration

Export Copy Down Records

From the Copy Down tool, administrators can export the most recent copy down records to an Excel file. Up to 60 records are included in the exported file.

To export copy down records to Excel, go to [ADMIN > TOOLS > CORE FUNCTIONS > COPY DOWN](#). Then, select the three-dot menu icon in the upper-right corner of the Copy Down Records table. Then, select **Export Copy Down Records**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration

View Copy Down Blackout Dates

Administrators can view the copy down blackout dates from the View Copy Down Details flyout.

To view the copy down blackout dates, go to [ADMIN > TOOLS > CORE FUNCTIONS > COPY DOWN](#). Then, select the **View** link for the appropriate copy down. In the date and time section, select the **View Blackout Dates** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration

View Blackout Dates ✕

Date	Environment
1/11/2023	Stage
1/12/2023	Stage
1/13/2023	Pilot, Production, Stage
1/14/2023	Pilot, Production, Stage
1/15/2023	Pilot, Production, Stage
1/21/2023	Pilot, Production, Stage
1/22/2023	Pilot, Production, Stage
1/25/2023	Stage
1/26/2023	Stage
1/27/2023	Pilot, Production, Stage

1 2 3 4 5 ... 16 >

[Close](#)

View Copy Down Details

Administrators can view the following details for an existing copy down:

- Source environment
- Destination environment
- The selected information to copy
- Scheduled date and time for the copy down
- Option to view blackout dates - [See View Copy Down Blackout Dates](#) on page 103 *for additional information.*
- Email address for copy down statuses
- Email settings
- Acknowledgments provided when the copy down was requested

To view the details of a copy down, go to [ADMIN > TOOLS > CORE FUNCTIONS > COPY DOWN](#). Then, select the **View** link for the appropriate copy down.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy Down - Cancel	Allows administrator to access the Copy Down tool, view and cancel copy downs, and subscribe or unsubscribe to email notifications. This permission cannot be constrained. This is an administrator permission.	Core Administration

View Copy Down Details ✕

*** Source Environment** *** Destination Environment**

Production ▼ Stage ▼

*** What information do you want to copy?**

Copy Portal Database ONLY

Copy Portal Database & All Uploaded Files

*** Select Date (PST)** *** Select Time (PST)**

[View Blackout Dates](#)

*** Send Copy Down Status Emails To**

Keep emails active in Destination Environment(s)

Note: This is not the default setting. Please note that keeping emails active in the Destination Environment will cause emails to fire to user's emails if the deadbox is removed.

*** Agree to the Following Acknowledgements**

I understand this action overwrites all data, configurations and content in the destination environment.

I understand this action is irreversible.

I have client approval to proceed with this action.

Custom Login Page - Advanced Option in Colorblock Layout

Custom Login Page offers three templates that can be customized according to an organization's login requirements and branding: Background, Classic, and Colorblock.

Previously, only the Background and Classic layouts included an Advanced Option section to support single sign-on (SSO) and self-registration links. Colorblock layout did not support adding an SSO or self-registration link.

With this enhancement, the *Advanced Option* section is included in the Colorblock layout to allow customers to add an SSO link as well as a Self Registration link when creating new custom login pages. Text, link text, and color can be customized for these SSO and Self Registration links.

The screenshot displays the configuration interface for a custom login page in the Colorblock layout. On the left, a preview shows the 'cornerstone' logo, a photograph of two women in an office, and a login form with the following elements: 'Power the future ready workforce.', 'Username: CA', 'Password: ****', a 'Log In' button, and links for 'Forgot password?', 'Forgot Username?', and 'Need help logging in? Contact us!'. The footer text is '© Cornerstone OnDemand. All Rights Reserved.'. On the right, the configuration panel includes: 'Support Email Address' (support@example.com), 'Email Text' (Contact us!), 'Support Email Link Color' (#F1C6A6FF), 'Footer Notes, If any' (Footer), 'Footer Text Color' (#404040FF), 'Page Title' (+ Cornerstone OnDemand +), 'Popup Login Text' (Logging in...), and an 'ADVANCED OPTION' section with checkboxes for 'Enable SSO' and 'Enable Self Reg'.

Single Sign-On (SSO)

Single sign-on allows the Cornerstone system to authenticate users into the portal upon their request to access the system. This affords users access to the system without having to log in once the user has been authenticated using their company login or local access network (LAN) password.

- **Enable SSO** - Select this checkbox to enable an SSO Login link on the login page.
- **SSO Text** - In this field, enter the text that should appear before the SSO Login link.
- **SSO Text Color** - Select the text color for the text that appears before the SSO Login link. You can enter the Hex value in the text field or select the color box to enter RGBA values, Hex values, or manually select a color from the color palate.
- **SSO Link Text** - In this field, enter the text for the SSO Login link.

- **SSO Link Text Color** - Select the text color for the SSO Login link text. You can enter the Hex value in the text field or select the color box to enter RGBA values, Hex values, or manually select a color from the color palate.
- **SSO Link** - In this field, enter the inbound SSO URL for the portal. This is also known as the CSOD ACS URL.

Self Registration

Self-Registration functionality allows administrators to manage new users coming into the system via pre-defined groups. By sending them to a special URL and assigning the users a code, users will be assigned to a group when they register through the Self-Registration page. Each group can then have parameters set which will determine how that user will be classified and managed within the system.

- **Enable Self Reg** - Select this checkbox to enable a Self Registration link on the login page.
- **Self Reg Text** - In this field, enter the text that should appear before the Self Reg link.
- **Self Reg Text Color** - Select the text color for the text that appears before the Self Reg link. You can enter the Hex value in the text field or select the color box to enter RGBA values, Hex values, or manually select a color from the color palate.
- **Self Reg Link Text** - In this field, enter the text for the Self Reg link.
- **Self Reg Link Text Color** - Select the text color for the Self Reg link text. You can enter the Hex value in the text field or select the color box to enter RGBA values, Hex values, or manually select a color from the color palate.
- **Self Reg Link** - In this field, enter the Self Registration URL for the portal. This URL can be found on the Guest User Settings tab when managing the corresponding Self Registration Group.

How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to add and customize a single sign-on (SSO) link and self-registration link in the Custom Login Page Colorblock layout.

Considerations

The *Advanced Option* section in the Colorblock layout is not available for existing custom login pages. It is only available when creating new custom login pages.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permission applies to this functionality:

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

Custom Login Page - Manage	Grants access to create and edit custom login pages for the portal. Administrators with this permission can also enable or disable a custom login page and identify the default login page. This permission cannot be constrained. This is an administrator permission.	Core Administration
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Default Email Address Settings - Option to Define Multiple Addresses

Default Email Address Settings - Option to Define Multiple Addresses

Prior to this enhancement, administrators could configure one default "From" email address and one default "Reply-To" email address.

With this enhancement, administrators have the option to define up to 10 default "From" and "Reply-To" email addresses in the *Default Email Address Settings* section of Corporate Preferences. Once defined, they can be selected when creating or updating an email in Email Administration and in Marketing Communications. Administrators can edit and delete default email addresses at any time.

This functionality is not available at the start of UAT.

How Does this Enhancement Benefit My Organization?

In cases where different email addresses are needed per functional area, those can now be pre-defined and selected from a drop-down when creating emails.

Implementation

This functionality is automatically enabled for all organizations.

This functionality is not available at the start of UAT.

Permissions

The following existing permission applies to this functionality:

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

Corporate Preferences - Default Email Address Settings

The *Default Email Address Settings* section now enables administrators to define up to 10 default "From" and "Reply-To" email addresses. Once defined, they can be selected when creating or updating an email in Email Administration and in Marketing Communications.

Administrators can edit and delete default email addresses at any time. However, updating or removing an email address only impacts newly created emails and templates. Existing emails and templates are unaffected.

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

Permissions

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

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:

Create From Address

- apalekar@csod.com
- kalavala@csod.com
- smansukhani@csod.com
- admin@csod.com
-
- bzhou@csod.com
- icalderon@csod.com
- ces.email@cyberu.com
- ajayanth@csod.com
- sneha@csod.com

Create Reply-To Address

Please note : Updating or removing the email address(es) has only an impact on newly created emails and templates. Existing emails and templates remain unaffected.

Create Email - Default Email Addresses

Once additional default email addresses are defined in Corporate Preferences, they can be selected when creating or updating an email in Email Administration and in Marketing Communications.

When creating an email, a new drop-down menu is available next to the **From Address** and **Reply-To Address** fields. This menu contains all of the defined default email addresses. When configuring the email, administrators can select one of the default email addresses or enter an email address in the text field. Administrators may modify the selected email address, as needed.

The screenshot displays the 'Create Email' configuration interface. At the top, the 'Action' is set to 'Form Approval Required'. The 'Email Title (English (US))' field is empty, with an 'Active' checkbox checked. The 'From Address' field contains 'sneha@csod.com' and has a dropdown menu open next to it. The dropdown menu lists the following email addresses: 'sneha@csod.com', 'apalekar@csod.com', 'kalavala@csod.com', 'smansukhani@csod.com', 'admin@csod.com', 'amurthy@csod.com', 'icalderon@csod.com', 'ces.email@cyberu.com', and 'ajayanth@csod.com'. The 'Reply-To Address' field is empty. The 'Type' dropdown is set to 'Notification'. Below these fields, there is a section for recipients with the instruction 'Please select users to receive this email.' The 'Send To' field shows 'Samriddh Kulshrestha' with a note '(A separate email will be sent to each recipient listed)'. The 'Cc' field is empty with an 'Add' button. At the bottom, the 'Availability' dropdown is set to 'Select Criteria'.

Deprecation of User and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) - March '23 Update

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

Most of the missing parity features those customers were dependent on became available in Edge Import with subsequent releases.

Remaining Milestones

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

Exception

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

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

Only for the excluded customers, Data Load Wizard loads and feeds will be deprecated with the 2023 July '23 Release.

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

March '23 Language Pack Updates

New updates to Cornerstone Language Packs and additional languages are available with the March '23 Release. Please visit the [March '23 Language Pack Updates](#) posting to review the full list of changes and their targeted availability in stage and production environments.

Languages with updates for the March '23 Release include:

- Czech
- Chinese (Traditional)
- English (Australia)
- English (UK)
- French (France)
- German
- Greek
- Italian
- Japanese
- Norwegian
- Polish
- Portuguese (Brazil)
- Portuguese (Portugal)
- Romanian
- Russian
- Spanish (Mexico)
- Spanish (Spain)
- Slovenian

This functionality is not available at the start of UAT.

Implementation

This functionality is automatically enabled for all organizations.

OK Button Removed from SSO Timeout, Logout, and Error Pages

Prior to this enhancement, an OK button was available on the Single Sign-on (SSO) Timeout, Logout, and Error pages. However, the OK button had no functionality.

With this enhancement, the OK button is removed from the SSO Timeout, Logout, and Error pages.



Implementation

This functionality is automatically enabled for all organizations using Single Sign-on functionality.

Security Role Administration Enhancements

The following enhancements have been made to Security Role Administration to help prevent inadvertent errors when creating and updating security roles:

- The security role name is displayed when adding permissions to a security role
- The permission name is displayed when adding constraints
- "(Copy)" is displayed in the role name when copying an existing role

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

Adding Permissions to a Role

When adding permission to a security role, the name of the security role is displayed in the Select Permissions pop-up. This helps administrators easily recall the security role to which they are adding permissions.

ADD PERMISSION	DESCRIPTION	CATEGORY
<input type="checkbox"/> Access Capabilities - Library Load	Grants ability to load capabilities using Edge Import	Edge Import
<input type="checkbox"/> Access Capabilities - User Profile Load	Grants ability to load capabilities user profile using Edge Import	Edge Import
<input type="checkbox"/> Access Edge Import	Allow access to Edge Import	Edge Import

Add Constraints to a Permission

When adding constraints to a permission, the name of the permission is displayed in the Add Permission Constraints pop-up. This helps administrators easily recall the permission to which they are adding constraints.

Copy Security Role

When copying an existing security role, the new security role name has "(Copy)" added to the name of the original security role. This helps administrators easily identify that they are creating or editing a copy rather than the original. This also helps administrators recall which security role is being copied and edited.

Create Role - Cost Model Manager (Copy) Show Me ?

General | Permissions | Constraints

Enter the name, description and parent for this role. The parent will inherit any permissions added to this role that do not already exist in the parent. Select from pop-up

Role Details

Name: Cost Model Manager (Copy)

ID: 16fbf470d3914be58e810dc170b728a8 ?

Category: System Administration

Parent: Cornerstone Administrator ?

Description: upload end edit cost files for Planning ?

Active:

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permission applies to this functionality:

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

Edge Import Enhancements

Edge Import - Allow Update to Requisition Templates Created From UI

Prior to this enhancement, Edge Import did not allow administrators to modify a requisition template that was created from the Requisition Templates page in the system.

With this enhancement, administrators can now update any requisition template through Edge Import. Requisition Template ID and Requisition Template Reference IDs can be retrieved from Reporting 2.0 and used to update any requisition template.

When creating a configuration for a Requisition Template load, the following question is now available:

- What is the primary identifier? - The available options are Requisition Template Reference ID and Requisition Template ID (update only). The Requisition Template ID can be used to update an existing requisition template, regardless of how it was created. The Requisition Template Reference ID can be used to create new requisition templates and update templates that were created using Edge Import or Data Load Wizard.

How Does this Enhancement Benefit My Organization?

This enhancement provides more flexibility to manage requisition templates in bulk.

Considerations

The new configuration option is only available for new configurations. Administrators must create new configurations in order to use this option.

Implementation

This functionality is automatically enabled for organizations using Edge Import.

Permissions

The following existing permissions apply to this functionality:

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

Edge Import - Learning Load Enhancements (Training Loads)

With this enhancement, training loads are updated with new fields and functions.

Material Load

Previously, administrators could create and update materials in bulk with all portal-supported file types except for .ppsx. With this enhancement, the Material load now supports the .ppsx file type when creating or updating materials.

ILT Events Load

Previously, administrators could use this load to translate event-related standard and custom fields except Event ID. With this enhancement, the ILT Events load now supports the import of translations for the Event ID field. To use this field, the load configuration should be a Translation load type with Learning Object as the unique identifier.

ILT Session Load

Previously, administrators could use this load to translate session-related standard and custom fields except Session ID. With this enhancement, the ILT Session load now supports the import of translations for the Session ID field. To use this field, the load configuration should be a Translation load type with Locator Number as the unique identifier.

Previously, when the unique identifier is set to "Unique Session ID across all Events," the Event ID was always required. However, it should only be required when creating new sessions. With this enhancement, when the unique identifier is set to "Unique Session ID across all Events," the Event ID is only required when creating new sessions. In the template guide, the description for Event ID is updated to reflect this behavior. An error is displayed if the Event ID is not provided for a new session when Session ID is unique across all events.

Curriculum Load

Previously, administrators needed to complete two loads to fully create curricula, the Curriculum load to create the curriculum and the Curriculum Structure load to add child learning objects. With this enhancement, the Curriculum load is enhanced with Child LO ID and Section Name fields. This ensures at least one child learning object is added to the new curriculum structure. These fields are only required when creating new curricula. These fields are not applied when updating curricula, as administrators should use the Curriculum Structure load to update the curriculum structure.

LO Equivalency Load

Previously, administrators could use this load type to apply equivalencies to future transcript transactions, but equivalencies could not be applied retroactively. With this enhancement, an Apply Retroactively field is now available, and this field is optional. This enables administrators to apply equivalencies retroactively in bulk.

LO Availability Load

For LO Availability loads, the existing Availability Type field is repurposed and renamed to Availability Criteria. Existing saved configurations cannot be used. Administrators must create new configurations and delete existing configurations.

Previously, administrators could manage LO availability in bulk, but they could not set the training as Required, Suggested, or Featured. With this enhancement, a new Availability Type field is added. This field is optional, and it can be used to set the training as Required, Suggested, or Featured. When the Availability Criteria is removed via the data load, the respective Availability Type is also removed.

Previously, the LO Availability load could only be used for manual, one-time loads. With this enhancement, automated scheduled feeds and Bulk API are now supported for this load type. Access to this functionality is controlled by new permissions. Also, Bulk API must be activated.

Online Content (OLCO) Metadata Load

Previously, the Online Content (OLCO) Metadata load could only be used for manual, one-time loads. With this enhancement, automated scheduled feeds are now supported for this load type. Access to this functionality is controlled by a new permission.

Online Content (OLCO) Transcript Load

Previously, the Online Content (OLCO) Transcript load could only be used for manual, one-time loads. With this enhancement, automated scheduled feeds are now supported for this load type. Access to this functionality is controlled by a new permission.

Thumbnail Images

Previously, administrators could not add thumbnail images to training in bulk. With this enhancement, a Thumbnail field is now available, and this field is optional. This allows administrators to apply thumbnail images to training in bulk. If no value is provided for this field, the Default Training Image Preferences are applied. The thumbnail image file must be placed in the Cornerstone FTP location in the following folder: LMS/[TRAINING LOAD TYPE]/Thumbnail. This FTP folder structure should be created if it does not already exist.

This applies to the following load types:

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

To remove a thumbnail image that is already set for a training item, load the training with a blank value for the Thumbnail field and set the configuration to Apply Default Value for blank values. Following the load, the default thumbnail image will be applied based on Default Training Image Preferences.

Implementation

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

Permissions

The following new permission applies 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 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 - OLCO Metadata Feed	Grants access to the Online Content Metadata data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Feed	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, the new *Access Bulk API - LMS - LO Availability*, *Access LMS - LO Availability Feed*, *Access LMS - OLCO Metadata Feed*, and *Access LMS - OLCO Transcript Feed* permissions are automatically granted to the default System Administrator role. Administrators must grant these permissions to other roles, if necessary.

Edge Import - Learning Load Enhancements (Transcript Loads)

With this enhancement, additional functionality is added for updating transcript statuses using Edge Import.

- Online Course Transcript Load - Previously, administrators could use this load to create transcript records in Failed status, and they could update transcript statuses from In Progress to Completed or Exempt. However, they could not update transcript statuses from In Progress to Failed. With this enhancement, administrators can update transcript statuses from In Progress to Failed.
- ILT Transcript Load - Previously, the default value for the Pass/Fail field was Fail. With this enhancement, the default value for the Pass/Fail field is Pass. This default value is only applied if the Pass/Fail field is not mapped in the load configuration or for records in the loaded file that do not contain a value for the Pass/Fail field.

How Does this Enhancement Benefit My Organization?

This enhancement provides extended support of existing import fields.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Online Transcripts Load	Grants access to the Online Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - ILT Transcripts Load	Grants access to the ILT Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - New Learning Load Type (Certification Transcript Update)

With this enhancement, Edge Import now provides the ability to edit certification due dates, edit certification expiration dates, and archive or unarchive certifications in bulk via manual loads using Edge Import.

The new Certification Transcript Update load type supports the following fields:

- User ID
- Certification ID
- Certification Due Date
- Certification Expiry Date
- Certification Archived

Considerations

- Feeds and Bulk API are not currently supported. This will be addressed in a future release.

Implementation

This functionality is automatically enabled for existing Edge Import customers.

A new *Access LMS - Certification Transcript Update Load* permission controls access to this new load type in Edge Import.

The template guide in Edge Import contains additional information for the new load type.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Certification Transcript Update Load	Grants access to the Certification Transcript Update data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, the new *Access LMS - Certification Transcript Update Load* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Edge Import Framework - Download Original File Uploaded

With this enhancement, customers can download the original file that they uploaded for an Edge Import data load. This option is available in the Load Details section of Edge Import. The name of the file is now a link so the file that was uploaded can be downloaded.

The link to download the file is accessible even if you were not the person who originally uploaded the file. However, the link respects the existing *Download Reports Access when portal opts-in for Restrict reports access - Edge Import* permission which is available via a backend setting. If this permission is enabled, then only users who have this permission can download the file.

The link to download the file is only available for 30 days.

To access the Edge Import Demo Load Details page, go to [ADMIN > TOOLS > EDGE > IMPORTS AND FEEDS > LOAD > \[SPECIFIC LOAD\] > LOAD DETAILS](#).

The screenshot shows the 'Load Details' page for a specific load. The sidebar on the left contains a 'Load Details' section with a 'What is this?' link and a table of information. Below that is a 'Quick Stats and Reports' section with a 'Download' button and a table of statistics. The main content area features a large green circle representing 100% overall progress and a 'Record Details' section with a legend for 'Successful', 'With Warnings', 'Not Loaded', and 'In Progress'.

Information	
Category	Demo
Type	Getting Started
File Name	LF_Yr_Assignment_Date_-_To_FTP_20221219_01_1... (1).xlsx
Configuration	View
Loaded By	Admin, Cornerstone
Started	Jan 3, 2023 11:19 PM PST
Completed	Jan 3, 2023 11:19 PM PST

Quick Stats and Reports	
Loaded	10 Download
Successful	10 Download
With Warnings	0
Not Loaded	0
Total	10 Download

How Does this Enhancement Benefit My Organization?

When an Edge Import report indicates there is an error in the file that is uploaded, this enhancement makes it easier to fix the data based on the error given in the reports. This can help administrators resolve errors more easily.

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
Download Reports Access when portal opts-in for Restrict reports access - Edge Import	<p>Grants ability to download Edge Import load details reports for loads performed by others.</p> <p>Users who do not have this permission cannot download load import results for loads performed by others. In addition, users without this permission cannot load data for someone who has previously only validated their data.</p> <p>This permission cannot be constrained. This is an administrator permission.</p> <p>This permission is only available and applicable when the portal has enabled the restriction for Edge Import load details report access.</p>	Edge

Integrations & APIs - Core/General

ADP Decidium Core Data Inbound Integration

The new ADP Decidium Core Data Inbound Integration provides a one-way synchronization of users and organizational unit (OU) data from ADP Decidium to a Cornerstone portal.

The integration provides the following features:

- Facilitates User and OU sync from ADP to the Cornerstone portal by providing basic information
- Provides options to run on Full Sync or Delta Sync mode
- Supports sync of either User or OU or both
- Option to exclude specific OUs
- User friendly OU mapping
- Email Notification with summary after the sync

How Does this Enhancement Benefit My Organization?

This integration provides centralized management of user and OU data in ADP Decidium to avoid redundant data entry work.

Implementation

This integration is available for self-activation.

- Only available in ADP French Marketplace.
- Only available in Edge Marketplace for CDG, FRA, and LHR swim lanes.

Enablement is a two-step process:

1. Purchase the integration via the ADP French Referral Marketplace. This requires contacting ADP directly to purchase, install, and configure.
2. Purchase, install, and configure the integration in Edge Marketplace via the ADP Decidium Core Data Inbound Integration tile.

Cornerstone Learning Connector for ADP Workforce Now® Next Generation

Cornerstone CSX currently has core (user and organizational unit) and single sign-on (SSO) integrations with ADP's Workforce Now. ADP will stop selling Workforce Now. This new integration provides a migration path for existing customers and provides integration solutions to new customers.

The ADP Workforce Now Next Generation Integration includes the following key features:

- Cornerstone Learning Connector for ADP Workforce Now Next Generation - This is a one-way integration that synchronizes user and organizational unit (OU) data from ADP Workforce Now Next Generation to CSX. The integration runs nightly at a pre-defined schedule for both OU and user syncs. Syncs can also be triggered ad hoc.
- Cornerstone Learning Single Sign-on for ADP Workforce Now Next Generation - This provides a unidirectional SSO from ADP Workforce Now Next Generation to CSX (deep link and mobile are not supported). SSO is available to all users.

This integration is available as of February 14.

Considerations

- The following ADP Workforce Now Next Generation implementations are not supported:
 - Employees that belong to multiple companies with different positions, locations, etc.
 - Employees that belong to multiple companies and have identical OU codes within the same OU type
- Additional exceptions will be documented in the starter guide

Implementation

These integrations are available for self-activation in the Edge Marketplace.

Two new tiles are available in Edge Marketplace that allow customers to install, configure, and enable the integration:

- Cornerstone Learning Connector for ADP Workforce Now Next Generation
- Cornerstone Learning Single Sign-on for ADP Workforce Now Next Generation

Both tiles must be installed on the Edge Marketplace to run the core data inbound and SSO integrations. Set-up details will be provided in the starter guide. Integrations are only available to customers in LAX swim lanes.

Enablement is a two-step process:

1. Purchase the app on ADP Marketplace. The core data inbound and SSO integrations are bundled into one app on ADP Marketplace.
2. Install the integrations on the Edge Marketplace. Integrations are only available to customers with an ADP Workforce Now Next Generation account. Those with a legacy ADP Workforce Now account are not able to purchase the app from ADP Marketplace.

This integration is available as of February 14.

Permissions

The following existing permissions apply to this functionality:

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

SOAP API Deprecation in 2023 Q4

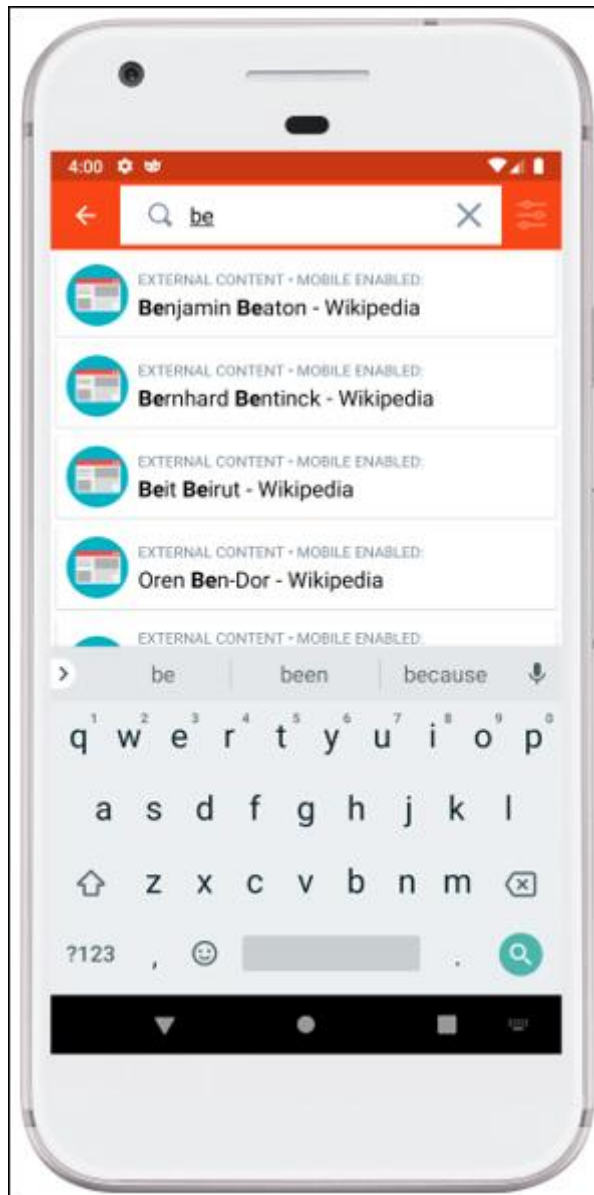
All Cornerstone SOAP APIs, except Transcript APIs (/webservices/LMS/LOWS.asmx), will be deprecated in Q4 of 2023. This will impact only a subset of API customers.

Mobile Enhancements

Auto Suggestions for Search

With this enhancement, the search within the Cornerstone Learn app predicts the user's query and provides suggestions as the user types. Up to 10 matching search results displayed when two or more characters are typed. Matching search text is highlighted in the suggested results overlay. When the user selects a suggested result, the user is navigated to the suggested page.

This functionality is not available during UAT.



How Does this Enhancement Benefit My Organization?

Predictive search leads to better search results. Auto suggestions can directly take app users to results without having to manually type every character, minimizing the chance of an unsuccessful search.

Implementation

This functionality is automatically enabled in versions of the Cornerstone Learn app available after the March '23 Release.

If the apps on a user's device are configured to auto-update, no action is required from the user to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from either the Apple store or the Google Play store.

This functionality is not available during UAT.

Deep Links in the Learn App

Prior to this release, when a user selected a deep link, the user was directed to their web browser.

With this release, Cornerstone Learn app users are taken directly to the relevant page in the Learn app when the following types of deep links are accessed using a mobile device:

- Training Detail
- Transcript
- Launch and Register
- Launch Training

If the user is not already logged in to the app, they will be prompted to log in prior to navigating to the deep linked page or training. Email tags LAUNCH.TRAINING and TRANSCRIPT.LINK are also supported with this enhancement when the deep link backend setting is enabled for these tags.

This functionality is not available during UAT.

How Does this Enhancement Benefit My Organization?

Deep links send users directly to the relevant Learn app module instead of the browser, which is in line with customer expectations and makes it easier to complete training when working remotely.

Implementation

This functionality is automatically enabled in versions of the Cornerstone Learn app available after the March '23 Release.

If the apps on a user's device are configured to auto-update, no action is required from the user to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from either the Apple store or the Google Play store.

Training must be enabled for Mobile in the Course Catalog. Deep links with csod.com are supported; deep links for Vanity URLs (custom base URLs) and Encoded URLs are not supported.

This functionality is not available during UAT.

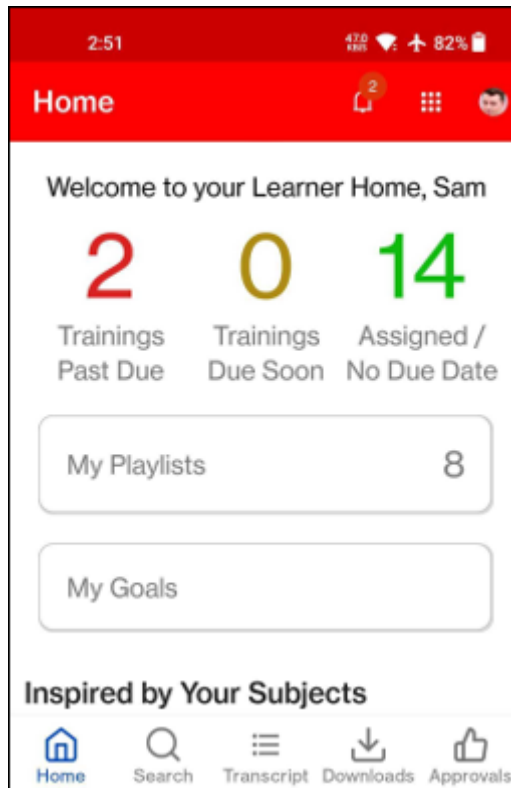
Goals in the Learn App

With this enhancement, support for Goals is introduced in the Cornerstone Learn app. App users can access their goals from the Home screen. The Goals page lists the user's goals with overall progress and weight details. Users can view goal details, including Tasks, Targets, Comments, and Attachments. Users can sort and filter their goals.

This functionality is not available during UAT.

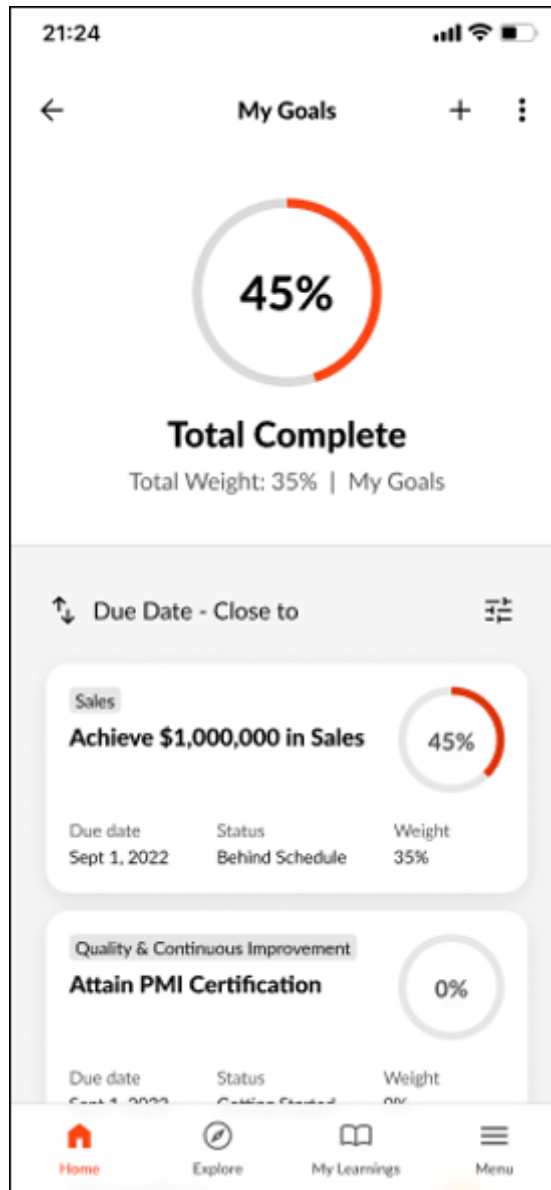
Learner Home - My Goals

On the Learner Home page, a new entry point is added to access goals. Selecting this link opens the Goals page.



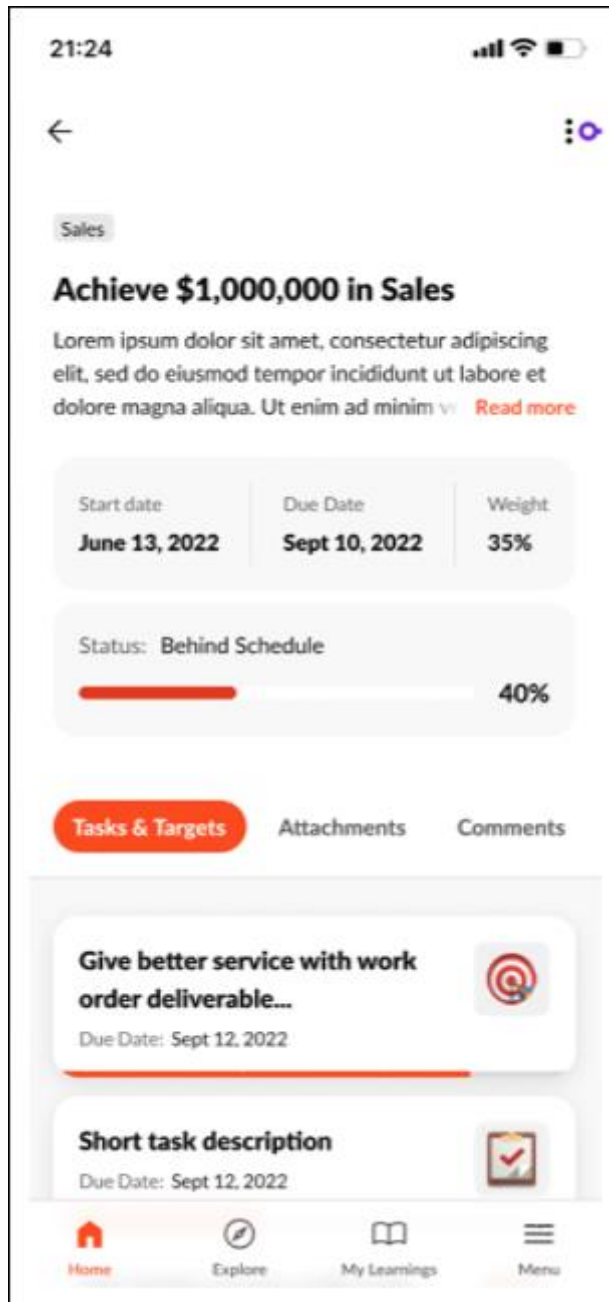
Goals Page

The Goals page displays the user's overall goal progress and weight details. Each of the user's goals are listed. Users can select a goal to open the Goal Details page.



Goal Details Page

The Goal Details page includes all information related to the goal, including description, due dates, tasks and targets, attachments, and comments.



How Does this Enhancement Benefit My Organization?

Users can access and review goals at any time using the Cornerstone Learn app.

Considerations

The Goal Creation and Editing features are not available in this release.

Implementation

This functionality is automatically enabled in versions of the Cornerstone Learn app available after the March '23 Release.

If the apps on a user's device are configured to auto-update, no action is required from the user to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from either the Apple store or the Google Play store.

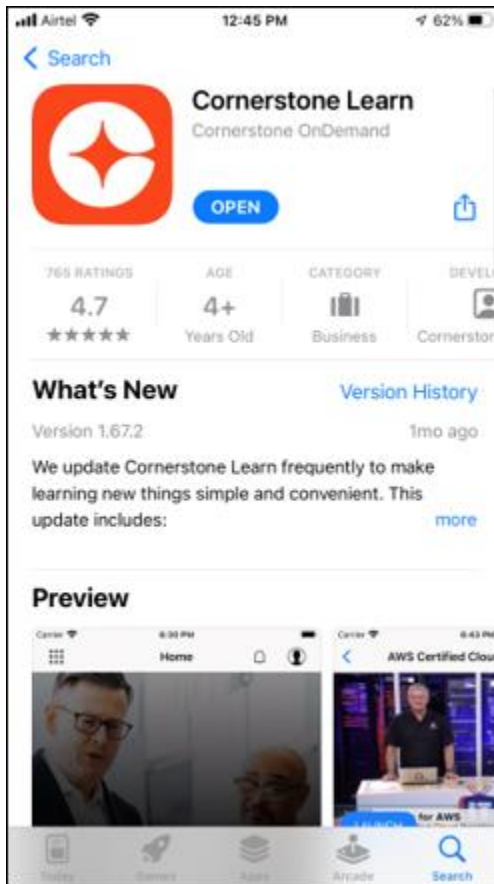
This functionality is not available during UAT.

Re-naming Cornerstone Learn App in July 2023

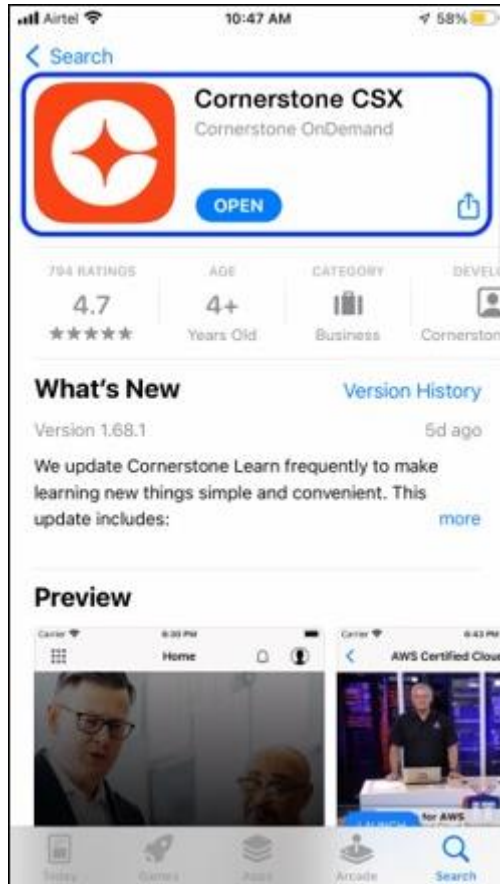
A unified talent experience for desk and deskless workers is a requirement for many customers looking to manage continuous learning and performance, in the moment. Nearly half of Cornerstone Learning users are also using Cornerstone Performance and would benefit from being able to access goals and other 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

CSX Custom Reports Deprecation

Phase 3, the final phase of the CSX Custom Reports deprecation, is occurring with the March '23 Release. The deprecation was implemented in phases to give customers time to prepare and to complete their migration to Reporting 2.0. With Phase 3, all remaining access to custom report is removed. Customers can no longer use or migrate Custom Reports at all. Custom Report Dashboard widgets will also no longer be available, which means any published custom report widgets will be removed from Dashboards as well. Please review the Deprecation phases and their milestones at the end of this deprecation announcement.

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

Deprecation Phases

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

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

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

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

Phase 3 - March '23 Release (17 March - Q1):

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

Permissions

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

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

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

- [Permissions in Reporting 2.0](#) - This provides detailed information about Reporting 2.0 permissions.

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

CSX “User Record as of a Date” Standard Report Deprecation

The "User Record as of a Date" Standard Report is being deprecated with the March '23 Release. Customers are encouraged to use alternative reporting options that are currently available today.

- Customers who have Cornerstone HR CSX enabled in their portal, using the effective dating feature or the aggregate audit feature, are encouraged to use the "Point-in-time Headcount Details" report instead. This report will provide a list of user records for a specific date at any point in time.
- Customers who do not have Cornerstone HR CSX enabled are encouraged to use Reporting 2.0 instead. For customers who do not use Cornerstone HR CSX, this report did not respect any past/future point in time relations/data values. It always generated results based on an "as of now" dataset which is why Reporting 2.0 is a viable alternative.

Deprecation Milestones:

- Milestone 1 (August 2022): August '22 Release initial deprecation announcement.
- Milestone 2 (November 2022): November '22 Release deprecation announcement reminder.
- Milestone 3 (March 2023): Deprecation of the “User Record as of A Date” standard report.

Reporting 2.0 - Additional Fields

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

- **Reporting Fields - Check-Ins**
- **Reporting Fields - Competencies**
- **Reporting Fields - Goals**
- **Reporting Fields - Learning**
- **Reporting Fields - Succession**

Reporting 2.0 - Calculated Fields: Add Parameters Hour, Minute, and Second to Function DATEADD

Prior to this enhancement, the DATEADD function supported the following parameters: Year, Quarter, Month, Day, and Week. For example:

- DATEADD(Year, -1, "01/25/2020") returns 01/25/2019
- DATEADD(Week, 2, "01/01/2020") returns 01/15/2020

With this enhancement, the DATEADD function now also supports the following time parameters: Hour, Minute, and Second. For example:

- DATEADD(Hour, 1, "01/27/2020 11:24:00") returns 01/27/2020 12:24:00
- DATEADD(Minute, 2, "01/27/2020 11:24:00") returns 01/27/2020 12:26:00
- DATEADD(Second, 3, "01/27/2020 11:24:00") returns 01/27/2020 12:26:03

How Does this Enhancement Benefit My Organization?

This enhancement allows users to use the time parameters such as Hour, Minute, and Second with the DATEADD function.

Implementation

This enhancement is automatically enabled for all organizations.

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 - Calculated Fields: Additional Validations

With calculated fields, you can generate aggregated reports based on totals of data. Report creators can generate aggregated reports to create simple, custom calculations on their reporting data without having to export and manipulate that data in a different tool.

Prior to this enhancement, Reporting 2.0 sometimes generated validation errors for reports containing calculated fields when users saved or downloaded the reports. As the reason for these errors was not known, it resulted in confusion.

With this enhancement, additional validations are performed upfront in the Calculated Field Editor to ensure correctness and successful generation of reports with calculated fields. Calculated field validations have existed previously. This feature enhancement expands the types and scope of validations performed to make the validation functionality more robust and to reduce errors when running reports.

- If column names are put between quotes, then the calculated field considers those as plain text or string, causing errors. Additional validation is required to check string to date conversion. For example, the validation of this formula `DATEVALUE("[Training].[Training Start Date]")` will fail in the future, as the field is incorrectly converted to text due to the addition of quotes.
- Some `DATEVALUE` fields are incorrectly used in formulas, but the previously existing validations passes the formula as a success. The following is an example of this validation:
 - Previously, `DATEVALUE("los angeles")` would generate as a "valid" formula due to the `DATEVALUE` function only validating that a single argument was provided, and the calculated field would be created successfully. However, when this calculated field is added to a report and the report attempts to render the data from the server, the report would fail to generate because the text "los angeles" cannot be converted to a date value or Datetime function.
 - With additional validations, the Calculated Field Editor validates that a valid value is entered, such as `DATEVALUE("03/08/2023")` or `DATEVALUE(TEXT(Transcript Due Date))`. The report creator is alerted of the identified error without successfully generating the calculated field until the formula is rectified.

How Does this Enhancement Benefit My Organization?

The enhancement comes with the following benefits:

- Reduces the number of errors received for reports containing calculated fields.
- Provides additional validations on correctness of the calculated field formula.

Example Scenario

Previously, `DATEVALUE("los angeles")` would generate as a "valid" formula due to the `DATEVALUE` function expecting a single argument, and the calculated field would be created successfully. However, when this calculated field is added to the report and the report attempts to render the data from the server, the report would fail to generate because the text "los angeles" cannot be converted to Datetime.

With additional validations, the report creator is alerted of the identified error without successfully generating the calculated field until the formula is rectified.

Implementation

This enhancement is automatically enabled for all organizations.

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 - Calculated Fields: Convert Date and Time to User's Time Zone

Prior to this enhancement, Reporting 2.0 did not apply local time zone to the date and time values in calculated fields. As a result, field values could be displayed to users in multiple time zones.

With this enhancement, report owners can choose whether to display a calculated field date and time value as per the user's local time zone or in UTC. A new **Localized time zone** toggle is added in the calculated field editor to convert date and time. The toggle is enabled by default, which applies the user's local time zone by default. When the toggle is disabled, Reporting 2.0 applies UTC time zone to date and time values in the calculated field.

How Does this Enhancement Benefit My Organization?

The enhancement brings the following benefits:

- Report owners can select localized time zone or UTC for date and time functions in the calculated field editor. This change applies to all functions that include date and time.
- It ensures consistency in the date and time values displayed in a report.

Considerations

- The toggle appears only when the calculated field output format is selected as "Datetime."
- This enhancement impacts new and existing reports.

Implementation

This enhancement is automatically enabled for all organizations.

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 - Calculated Fields: Field Selection When Two Fields with Almost the Same Name Exist

Prior to this enhancement, Reporting 2.0 did not always select the correct custom field if the application included multiple fields with almost the same names. For example, consider the following two fields where the only difference in names is the capitalization of the letter 'd' in 'date':

- Standard Field: Termination Date (with capital D)
- Custom Field: Termination date (with lower case d)

In such cases, Reporting 2.0 selected the standard field value by default over the custom field value, which resulted in an unexpected output of a calculated field.

With this enhancement, the calculated field now recognizes and includes the exact field that is selected by the report owner, even if the name of the selected field is nearly the same as another field.

How Does this Enhancement Benefit My Organization?

The enhancement eliminates additional work like renaming custom fields to avoid default standard field selection. It identifies the user selected custom field and includes it in the calculated field automatically.

Considerations

- This enhancement impacts new and existing reports.
- When both custom and standard fields have the exact same names, the calculated field includes the standard field value by default.

Implementation

This enhancement is automatically enabled for all organizations.

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 - Calculated Fields: Nesting for Aggregate Functions

Prior to this enhancement, Reporting 2.0 allowed calculated field functions to be used within other functions up to five levels. However, aggregate functions could not be nested, and so report owners had to perform many calculations manually, after exporting the data.

This enhancement enables report builders to nest one aggregated function within another, thereby allowing them to execute more calculation use cases directly in Reporting 2.0. Reporting 2.0 permits nesting aggregate functions up to one level so that report builders can use operations like CASE(GAVG), and IF(GMAX).

- Aggregate functions cannot be nested within another aggregate function.
- Aggregate functions can only be nested up to one level with non-aggregate functions (e.g., logical, numeric functions)

Examples

- GCOUNT(DATEDIFF(day, [User].[User Last Hire Date], TODAY()))
- GCOUNT(ISNUMBER([Transcript].[Transcript Score]))
- IF(GCOUNT([User].[User Name])>1, "Users took Training", "No users took training")

Implementation

This enhancement is automatically enabled for all organizations.

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 - Calculated Fields: New Operators to Include Both NULL and Empty Strings

Prior to this enhancement, Reporting 2.0 did not identify both NULL and empty values in calculated fields. Also, the function BLANKVALUE identified only NULL fields but not empty values. It would confuse the users, as it often excluded expected records.

With this enhancement, report owners can now include both NULL and empty values while creating a calculated field. They can also replace these values with preferred alternative values.

The enhancement comes with four new calculated functions:

- IFEMPTY - This function identifies an empty value and replaces it with a preferred value.
- IFNULLOREEMPTY - This function identifies both NULL values and empty values in one go and replaces it with a preferred value.
- ISEEMPTY - This function checks if a value is empty.
- ISNULLOREEMPTY - This function checks if a value is null or empty.

The following functions have been renamed:

- BLANKVALUE to IFNULL
- ISBLANK to ISNULL

How Does this Enhancement Benefit My Organization?

Report owners can now view NULL and empty values or the alternate values they assigned in the report output.

Considerations

Existing calculated fields and reports that use them will continue to function. This change is noticeable when calculated fields are edited or added.

Implementation

This enhancement is automatically enabled for all organizations.

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 - Chart Color Preferences for Shared Users in Reporting 2.0

Prior to this enhancement, Reporting 2.0 did not allow shared users to view the chart color palette defined by the report owner, which often created confusion as shared users had their own defined color palette. Sometimes, a field would be assigned unexpected color by default which did not match the title or content of the report. So, when a report owner assigned a color to a field, it would not be visible to shared users.

With this enhancement, report owners can share their defined chart color palette for a specific report with its shared users. You can do this by selecting the new **Apply as default color palette for this report when shared** checkbox in the color selection flyout and saving the report. When this option is selected, the report owner's defined chart color palette is only applied to fields in the shared report, and it will not affect shared user's color preference for same fields in other reports.

If you do not select the checkbox, the shared users will see their own defined colors or the default color assigned by the application.

How Does this Enhancement Benefit My Organization?

This enhancement improves user experience and communication by displaying a consistent color palette for reports across all shared users.

Considerations

- The shared color palette for the specific shared report cannot be edited by shared users with view only access.
- If the report owner has set a color palette, the same color palette applies across all reports for the owner if the same column is used, whether the checkbox is checked or not.
- If a shared user with edit rights updates the color palette of the shared report, the user who edits the report will see that color across all reports where the column is used, and the report owner will see this new color only for this specific report. The new color will also be visible for all shared users for this specific report.
- The checkbox is visible for all users. Users with edit rights can view and edit the checkbox. Users with view only permissions can only view the checkbox.
- The checkbox is unchecked by default, so it does not impact existing reports.
- This enhancement is applicable for reports shared through the Share flyout, as well as for email deliveries and dashboards.

Implementation

This enhancement is automatically enabled for all organizations.

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 - Include All or Only the Latest Version of a Training in a Report

Prior to this enhancement, when a user selected training to include in a Reporting 2.0 report, the output would include all versions of the training. It would result in additional work such as filtering out relevant versions.

With this enhancement, when selecting training to include in a Reporting 2.0 report, you can choose to include all versions of the training or only the latest version. It helps in producing more targeted reports and create a better user experience.

The enhancement comes with a new checkbox Show all versions, which is available on the Selected tab in the Select Training flyout. The checkbox is selected by default. You can clear the checkbox to only include the latest version of the training in the report. You can also preview the report to ensure you have included the right training versions in the report.

How Does this Enhancement Benefit My Organization?

The enhancement brings the following benefits:

- Allows selection of only the latest version or all training versions. This creates a report only having the required versions.
- Reduces clutter in your report as you can include only the latest version of a training item.
- Eliminates time consuming extra work such filtering out irrelevant records.

Considerations

- The enhancement does not affect existing reports as it will continue to include all versions of the selected training both in preview mode and in the report output.
- Report owners can edit an existing report and uncheck the new checkbox.
- If a user selects multiple training titles with the new checkbox checked for some and unchecked for others, then the preview and output will display all versions of the checked training titles and only the latest version of the unchecked training titles.
- If a training includes only one version, the report will only include that version.

Implementation

This enhancement is automatically enabled for all organizations.

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.

RTDW Updates to OData v4.0 Delta Objects

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

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 March '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 February 15 and in production with the release on March 17.

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

Data Exporter - Deprecated Objects Scheduled for March '23 Release

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

RTDW - Deprecated Objects Scheduled for March '23 Release

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

XLS to XLSX Output Format Upgrade - Most-Used Standard Reports

With the March '23 Release, the most frequently used Standard Reports are now exported to excel as an .XLSX format.

This enhancement includes the following Standard Reports:

- Acknowledgement*
- Curriculum Details
- Custom Form Data
- Enrollment Summary*
- Enterprise Past Due Training
- Enterprise Training*
- Goal Exception*
- Incomplete Training*
- Level 1 Evaluation*
- Online Course Attempts Report*
- Online Training Status*
- Past Due*
- Past Requests*
- Pending Requests*
- Performance Review Distribution
- Performance Review Rating
- Performance Review Step Status Report
- Records*
- Requests Status Summary*
- Resume Section Details
- Task User Status
- Test Analysis*
- Training Hours*
- Training Progress Pie Chart*
- Training Progress Summary Pie Chart
- Training Status Summary*
- Transcript Status

Reports listed with an asterisk (*) are reports with previously embedded HTML that are now generated as a .XLSX file format entirely.

How Does this Enhancement Benefit My Organization?

The modernized Excel file format provides enhanced security, optimized file size for storage, and improved data loss reliability when compared to the previous output format.

Considerations

- Training Progress Pie Chart excel output title is now Employee Training Progress Summary.

- The following reports have changed from a 24-hour format to a 12-hour format for the English (US) language; all other geographies continue to show in their respective regional format:
 - ILT Enrollment Report
 - ILT Requests Status Summary Report
 - Pending Requests
- The previous .XLS output generated unnecessary trailing spaces within cells for a given column. This is trimmed in the .XLSX format as a formatting improvement. This may cause row line changes for customer that have developed automation scripts with specific row line references.

Implementation

This functionality is automatically enabled for all organizations. To revert to .XLS format, the file type can be converted back manually via the standard process for converting file types within the Excel application.

Cornerstone HR

CSX “User Record as of a Date” Standard Report Deprecation

The "User Record as of a Date" Standard Report is being deprecated with the March '23 Release. Customers are encouraged to use alternative reporting options that are currently available today.

- Customers who have Cornerstone HR CSX enabled in their portal, using the effective dating feature or the aggregate audit feature, are encouraged to use the "Point-in-time Headcount Details" report instead. This report will provide a list of user records for a specific date at any point in time.
- Customers who do not have Cornerstone HR CSX enabled are encouraged to use Reporting 2.0 instead. For customers who do not use Cornerstone HR CSX, this report did not respect any past/future point in time relations/data values. It always generated results based on an "as of now" dataset which is why Reporting 2.0 is a viable alternative.

Deprecation Milestones:

- Milestone 1 (August 2022): August '22 Release initial deprecation announcement.
- Milestone 2 (November 2022): November '22 Release deprecation announcement reminder.
- Milestone 3 (March 2023): Deprecation of the “User Record as of A Date” standard report.

Form Enhancements

With this enhancement, two new Forms features are available:

- Target User Name in Request Titles: When viewing a request, the target user's name is added to the Request Title.
- "Personal Email Address field": "Personal Email Address" is added as a standard field when creating a form.

Target User Name in Request Titles

Prior to this enhancement, the Request Title did not include the user's name which made it impossible to identify the user associated with a request without opening each form request.

With this release, the Target User's full name is added to the Request Title, making it easy to identify the target user at a glance.

The Target User name is displayed in the Request Title when the form is submitted as follows:

- Using "Proxy as a user".
- Using "Complete Form" for another user.
- By the employee for themselves, for example, when requesting a day off (Requester = Target User).

Personal Email Address Field Now Available in Forms

With this enhancement, the Personal Email Address field is added under the User Standard Fields section on the Build tab. This allows users to request a personal data change for the Personal Email Address.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

Target User Name in Request Titles

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Items - Forms	Allows user to access form requests on Universal Profile Request items. This permission cannot be constrained.	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. Note: <i>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.</i>	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

Personal Email Address field in Forms

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. Note: <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

Form Management – Disable Form Fields in Reporting

Prior to this enhancement, there was no way to prevent reporting on fields from specific forms. Additionally, some fields were not available at all for reporting and the form data did not update correctly because of the 1024 field limitation.

With this enhancement, a new **Include form in reporting** option appears on the Manage Forms page. By selecting this option, administrators can decide per form if the response fields used in a form are reportable. Disabling form fields that are not in use anymore ensures that the number of fields reportable across forms stay below the system limit and ensures that form data updates correctly in reporting.

To access this option, administrators can go to [ADMIN > TOOLS > CORE FUNCTIONS > FORM MANAGEMENT > MANAGE FORMS](#) . On the Available Fields tab, select the Build tab.

- If the response fields should be included in reporting, click the **Include form in reporting** check-box.
- If the responses for the User Record Custom, Standard and Question Bank fields from the form should not be reportable, uncheck the **Include form in reporting** check-box.

By default, form fields on all existing and new forms are reportable.

Considerations

- All existing forms are automatically set to reportable.
- Submission fields continue to display in reports, regardless of the **Include form in reporting** setting.
- Response fields used in several forms, with one form set to non-reportable, still appear in reporting.
- The new form setting is hiding only response fields from the form.
- If the system limit of 1024 fields is reached, the form data does not update properly in Reporting 2.0. Reduce the number of response fields to stay within the limit.

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
-----------------	------------------------	----------

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

Ability to Reset Client ID and Secret for Webex Control Hub

Prior to this enhancement, administrators working with Webex vILT integration had to contact Global Customer Support (GCS) to reset the Webex Control Hub Client ID and secret key.

With this enhancement, administrators can now reset the Client ID and secret key to generate a new token.

Administrators can reset the Client ID and secret key by going to [ILT > VENDORS & INSTRUCTORS > EDIT VENDOR > WEBEX CONTROL HUB SETTINGS](#).

To reset Client ID and secret key:

1. On the Webex Control Hub Settings page, select the **RESET** button. The current Client ID and secret key is removed from CSOD. A new token is created.
2. Follow the instructions under the **How to set up your Webex Control hub integration section** to reset the Client ID and secret key.



Webex Control Hub Settings

How to set up your Webex Control hub integration

1. Login to <https://developer.webex.com>
2. Click on "Go to Docs" --> Integration --> Create an Integration
3. Enter your details along with Redirect URL (given below) and under "Scope" settings select "spark:people_read", "spark-admin:people_read" and "spark-admin:people_write"
4. Now copy your Client ID and Client Secret from the cisco portal and paste in the below fields.

Redirect URL: <https://qa01.csod.com/LMS/ILT/WebexControlHub.aspx?providerId=b36ee60b-3f69-4c9a-958a-2855fdbb8afb>

Client ID:

Client Secret:

Implementation

This functionality is automatically enabled for all organizations using the Learning module with a Webex vILT integration using Control Hub.

Accessibility Enhancements - March 2023

With this release, the following accessibility enhancements have been included:

- Color Contrast and Visual Cue Improvements
- Improvements for Screen Readers
- Improvements to Keyboard Navigation and Browser Focus

Color Contrast and Visual Cue Improvements

The following color contrast and visual cue improvements have been made:

- Curriculum Training Details Page - The text color for options in the Details column is updated. **This will be released in a future release.**
- Global Search Page -
 - The text that is displayed in search filters when the filters are empty (e.g., Subjects, Providers) is updated. **This will be released in a future release.**
 - The Refine Your Search heading text color is updated. **This will be released in a future release.**
- Global Search from Navigation - When using the Global Search field in the navigation, the text color for the headings inside the predictive search (e.g., Training, People) is updated. **This will be released in a future release.**
- Learning Detail Pages -
 - In the Action card in the upper-right corner of the page, the actions are separated by "Or" and a horizontal line. The color of these items is updated.
 - The Show More, Show Less, and Subjects links now have an underline to provide visual cues.
- Transcript: Request Exemption Pop-up - A description is added to the Request Exemption pop-up to explain that fields with an asterisk are mandatory. **This will be released in a future release.**
- Transcript: Print Transcript Page - When previewing the Print Transcript page, the header color for the table is updated. **This will be released in a future release.**

Improvements for Screen Readers

The following improvements have been made for screen readers:

- Learner Home -
 - Certain decorative images are no longer read by screen readers.
 - In the Your Playlists section, the links for Created, Followers, and Followed are more descriptive for screen readers.
 - The carousel pagination buttons are more descriptive for screen readers.
 - In the User Profile area, the Your Languages visual label and the label read by the screen reader now match.
 - The screen reader now reads the correct label for the Learning Search field.
 - The Options menu for trainings on carousels are now more accessible by screen readers.

- The screen reader better recognizes and announces updates to data on the Your Subjects flyout.
- Learning Search - In the Filters panel, the Reset link visual label and the label read by the screen reader now match.
- ILT Event Details - An alt image tag was removed from a decorative image.

Improvements to Keyboard Navigation and Browser Focus

The following improvements have been made to keyboard navigation and browser focus:

- Learner Home - Background items no longer receive keyboard focus when the Create Playlist modal is present.
- Learning Search - Hidden elements no longer receive browser focus in the filter. **This will be released in a future release.**
- Transcript: Print Transcript Page - A duplicate Print button is removed. **This will be released in a future release.**
- Online Class Learning Details Pages - The browser focus is now more prominent under Prework and Postwork.
- Learning Details Pages - The browser focus is now more prominent for the options under the main drop-down

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.

Certifications - Dynamic Re-Enrollment

Certifications - Dynamic Re-Enrollment

Prior to this enhancement, there was no way to automatically re-enroll users in a certification if they were dynamically removed from the certification and later meet the criteria again.

This enhancement allows a dynamic certification proxy to be configured with a new Dynamic Re-Enroll toggle. When this toggle is enabled, the dynamic certification proxy dynamically re-enrolls individuals who have been removed from a certification, allowing them to continue to work on the certification requirements. Enhanced auditing is available in modification history, proxy user history details, and approval history. New confirmation messages display when inactivating or activating a proxy enrollment or interacting with the dynamic re-enroll and dynamic removal toggles.

To help administrators better understand which proxy was used to enroll or remove a user from a certification, the Proxy ID displays on the following pages:

- Proxy Enrollment Page
- Proxy Enrollment Details Page
- As part of the audit history found on the Proxy User History details page
- In the user's approval history found on the certification management page

With this release, the user interface is also updated for the proxy list, proxy details, and proxy user history details. Additional Certification Administration pages are targeted for a future release.

How Does this Enhancement Benefit My Organization?

This enhancement improves administrator productivity and compliance by allowing the system to dynamically manage the re-enrollment of users who meet the criteria requirements for dynamic proxy enrollments.

Consideration - CSV Files of Users

Dynamic re-enrollment and dynamic removal are not fully supported for dynamic proxy enrollments that leverage .csv files. When the Enrollment is set to Dynamic for new dynamic proxies, the *Upload Users* section is now disabled.

However, if a dynamic proxy enrollment was created prior to this release using a .csv file and dynamic removal is later enabled for this dynamic proxy enrollment, all of the users loaded through the .csv file will be removed from the certification.

As an alternative solution, if dynamic proxy enrollment is to be used with a list of users, administrators should create a group using the .csv file, and then use that group when creating the dynamic proxy enrollment.

Consideration - Overlapping Dynamic Proxy Enrollments

Administrators may create multiple dynamic proxy enrollments for the same certification, and the same user may be included in the availability for different proxies for the same certification. If dynamic removal were to occur for a proxy enrollment where the user is included in another proxy enrollment for the same certification and the user is removed and

then re-enrolled with the new dynamic re-enrollment, this could result in the re-calculation of due dates and expiration dates.

Consideration - Dynamic Removal Logic

In order to keep a user in a certification where dynamic removal is used but the user is part of multiple proxy enrollments for the same certification, the dynamic removal logic is enhanced to check all active certification dynamic proxies before a user is removed. If a user is included in multiple active dynamic certification proxies for the same certification and is still in the availability for one of the proxies, then the user will remain enrolled in the certification even if dynamic removal is enabled for a proxy enrollment where the user is no longer part of the availability.

If dynamic removal is skipped for a user for this reason, then this is reflected in the Proxy User History Details. This enables administrators to understand why a user is not removed from the certification.

Frequently Asked Questions (FAQs)

[If I enable the new dynamic re-enrollment option for an existing dynamic proxy enrollment, will the dynamic enrollment functionality be applied?](#)

Yes, once dynamic re-enrollment is enabled, the system will analyze at the availability and re-enroll users that meet the availability going forward. If you are not using Dynamic Removal today, you may also want to enable Dynamic Removal.

[Why don't I see the Dynamic Re-enroll column on the Proxy Enrollment page?](#)

Check that you have the new *Proxy Enrollment for Certification - Dynamic Re-enrollment* permission.

[Can I constrain the *Proxy Enrollment for Certification - Dynamic Re-enrollment* permission?](#)

No, this permission cannot be constrained.

[What does a blank Status mean on the Proxy Details page for a user?](#)

Removed or Enrolled statuses are used to indicate a user has been enrolled or removed from a certification. If a user has not been enrolled or has been excluded from being enrolled in a certification, no value will display in the Status column. Please select the View Details link on this page for additional information.

[If a user is removed from a certification through bulk removal or individual removal, will the dynamic proxy re-enroll the user if the user is part of the dynamic proxy criteria and dynamic re-enroll is enabled?](#)

Yes, if dynamic proxy is configured to use dynamic re-enroll, the dynamic proxy will analyze the criteria used for the proxy enrollment, and if the user is part of the criteria but not currently enrolled in the certification, the user will be re-enrolled in the certification even if the user was not dynamically removed.

[Do I have to enable both dynamic removal and dynamic re-enrollment?](#)

No, both toggles do not have to be enabled, but if you enable dynamic removal and dynamic re-enrollment, the system can dynamically remove and re-enroll users as they meet the proxy criteria.

Implementation

This functionality is automatically enabled for all organizations using Certifications.

The new **Dynamic Re-enroll** toggle is off by default. It can be enabled by administrators with the new *Proxy Enrollment for Certification - Dynamic Re-enrollment* permission.

Permissions

The following new permission applies 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

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 – 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

Security Roles

Upon release, the new *Proxy Enrollment for Certification - Dynamic Re-enrollment* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Proxy Enrollment Administration - Dynamic Re-Enroll

With this enhancement, a new **Dynamic Re-enroll** is available on the Proxy Enrollment page. When enabled, the dynamic certification proxy dynamically re-enrolls individuals who have been removed from a certification, allowing them to continue to work on the certification requirements.

The Proxy Enrollment page is updated with a new look and feel.

The following new filters are available:

- Created By
- Type
- Dynamic Re-Enroll
- Dynamic Removal
- Status

To access proxy enrollment for certifications, go to: [ADMIN > TOOLS > LEARNING > LEARNING ASSIGNMENT TOOL](#). On the Manage Learning Assignments page, click the **OPTIONS** button in the upper-right corner of the page and click the **Certification Enrollment** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 – 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

Before

Proxy Enrollment

Use Proxy Enrollment to assign, pre-approve, or enroll individuals or groups of employees for training.

Proxy Enrollment for Certification

Keyword:

Request Date: This Week From: To: Search (2 Results)

Certification

Training	Create Date	Created By	Type	Status	Dynamic Removal	Options
CERT-03.00: Basic Fingerprinting	05/12/2011 13:23	Lolley, Jon	Dynamic	Active	OFF	
CERT-02.00: Police Etiquette	05/12/2011 12:47	Lolley, Jon	Standard	Processed		

After

Proxy Enrollment

Use Proxy Enrollment to assign, pre-approve, or enroll individuals or groups of employees for training. On this page you can also view previous proxy enrollment assignments.

Time Period Select Range

This Month -

Created By Type Status Dynamic Re-Enroll Dynamic Removal

Select Types Select Status Select... Select...

Search

Add New

Proxy ID	Training	Create Date	Created By	Type	Status	Dynamic Re-Enroll	Dynamic Removal	
299	General Safety II	1/4/2023 5:51 PM	Tatu, Debbie	Dynamic	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	View
298	General Safety II	1/4/2023 5:50 PM	Tatu, Debbie	Standard	Processed			View

Proxy Enrollment Details

The following enhancements are made to the Proxy Enrollment Details page:

- The page is updated with a new look and feel.
- Administrators can search the proxy history by name, user ID, or organizational unit.
- The Proxy Enrollment Details now includes an option to view the Selection Criteria.
- The Proxy History list now includes the User ID, Version, and Status values.
- A View Details option is available for each user. Selecting this link displays the Proxy User History Details.
- Previously, if an organizational unit was blank for a user, the user was not displayed on this page even if they were included in the proxy enrollment. With this enhancement, the user is displayed with a blank value for the organizational unit.

To access the Proxy Enrollment Details page, go to: [ADMIN > TOOLS > LEARNING > LEARNING ASSIGNMENT TOOL](#). On the Manage Learning Assignments page, click the **OPTIONS** button in the upper-right corner of the page and click the **Certification Enrollment** link. Then, select the **View** link for the appropriate proxy enrollment.

Before

Safety General

Safety General

Title: Safety General
 Enrollment Type: Certified
 Assignment Date: Immediately (12/15/2022)
 Assignment Time: Upon Submittal
 Request Type: Assign & Approve Certification – Item is not registered
 Requested By: Tatu, Debbie
 Requested Date: 12/15/2022 9:24 AM
 Status: Processed

SELECTION CRITERIA

Criteria	Include Subordinates
Amber Castle	<input type="radio"/>
Ed Castle	<input type="radio"/>
Cassidy Castle	<input type="radio"/>
Cally Castle	<input type="radio"/>

(4 Results)

Name	Organizational Unit	Process Date
Castle, Amber	Anaheim	12/15/2022 9:24 AM
Castle, Cally	Anaheim	12/15/2022 9:24 AM
Castle, Cassidy	Anaheim	12/15/2022 9:24 AM
Castle, Ed	Anaheim	12/15/2022 9:24 AM

After

Proxy Enrollment Details (Dynamic)

Use Proxy Enrollment details to see proxy level details. On this page, you can see the selection criteria, proxy users, and modification history.

Proxy ID 282	Title General Safety	Assignment Date 12/9/2022 3:10 PM	Request Type Assign & Approve Certification - Item is not registered
Selection Criteria View	Requested By Tatu, Debbie	Status Processed	Requested Date 12/9/2022 3:10 PM

Proxy History

Search

Name	User ID	Organizational Unit	Processed Date	Version	Status	
Taylor, Trevor	trevtaylor	!Solis Division	1/3/2023 7:56 AM	2.0	Enrolled	View Details
Taylor, Tina	ttaylor1	!Solis Division	1/3/2023 7:56 AM	2.0	Removed	View Details

Showing 1-2 of 2

Modification History

>

Back

Proxy User History Details

Proxy User History Details
✕

Skipped Enrollment by Proxy 299 on 1/4/2023 8:51 AM by Tatu, Debbie

Enrolled by Proxy 298 on 1/4/2023 8:50 AM by Tatu, Debbie

Close

Audit Enhancements - Modification and Approval History

On the Proxy Enrollment Details page, the Modification History is enhanced to track the date and time at which a user performs the following actions:

- Activates or inactivates a proxy enrollment
- Enables or disables the **Dynamic Re-enroll** setting for a proxy enrollment
- Enables or disables the **Dynamic Removal** setting for a proxy enrollment

On the Proxy Enrollment administration page, new toast messages display when inactivating or activating a proxy enrollment or modifying the **Dynamic Re-enroll** or **Dynamic Removal** settings.

On the Certification Details page, the Approval History is enhanced to display additional details on how the user was enrolled in the certification.

Proxy ID Values

To help administrators better understand which proxy was used to enroll or remove a user from a certification, the Proxy ID will now display on the following pages:

- Proxy Enrollment
- Proxy Enrollment Details
- Proxy Enrollment Modification History
- Proxy User History Details

The Proxy ID value displays the unique identifier of the proxy enrollment used to enroll a user or remove a certification from a user.

Proxy Enrollment

Proxy Enrollment

Use Proxy Enrollment to assign, pre-approve, or enroll individuals or groups of employees for training. On this page you can also view previous proxy enrollment assignments.

Time Period: **This Month** | Select Range: 1/1/2023 – 1/4/2023

Created By: | Type: **Select Types** | Status: **Select Status** | Dynamic Re-Enroll: **Select...** | Dynamic Removal: **Select...**

Proxy ID	Training	Create Date	Created By	Type	Status	Dynamic Re-Enroll	Dynamic Removal	
299	General Safety II	1/4/2023 5:51 PM	Tatu, Debbie	Dynamic	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	View
298	General Safety II	1/4/2023 5:50 PM	Tatu, Debbie	Standard	Processed			View

Proxy Enrollment Details

Proxy Enrollment Details (Dynamic)

Use Proxy Enrollment details to see proxy level details. On this page, you can see the selection criteria, proxy users, and modification history.

Proxy ID 282	Title General Safety	Assignment Date 12/9/2022 3:10 PM	Request Type Assign & Approve Certification - Item is not registered
Selection Criteria View	Requested By Tatu, Debbie	Status Processed	Requested Date 12/9/2022 3:10 PM

Proxy History

Name	User ID	Organizational Unit	Processed Date	Version	Status	
Taylor, Trevor	trevtaylor	!Solis Division	1/3/2023 7:56 AM	2.0	Enrolled	View Details
Taylor, Tina	ttaylor1	!Solis Division	1/3/2023 7:56 AM	2.0	Removed	View Details

Showing 1-2 of 2

Modification History >

Create Tool Enhancements

With this release, using the Create Tool, users can create interactive cards, add hints to Questions, change fonts, and export custom-built courses as SCORM 1.2.

To access these features, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CREATE TOOL](#).

Add Hotspots to Images

Encourage interaction and engagement by adding a hotspot to content.

To add a hotspot:

1. Add an Image card to your course.
2. Upload any image.
3. Click **Add Hotspot**.
4. Click and drag the area where you'd like to add the hotspot.
5. Enter a text description.
6. Click **Done**.

Add Hints to Questions

Reinforce important information by adding hints to multiple choice questions. Once a learner selects an option that has a hint, they can learn more about why their selected option is incorrect and/or see information about the right answer.

To add hints to questions:

1. Add a Question card to your course.
2. Enter your question.
3. Enter answer choices along with the hint for each choice.

Change Fonts

Use fonts to emphasize important information and provide consistency across content. Select text on any card to change the font.

To change fonts:

1. Add a Text card to your course.
2. Click and drag to select the text you want to format. Formatting options appear.
3. Click the font name to change the font.

Export content as SCORM 1.2

Organizations can now download and take their proprietary content with them to post on extranet sites or external systems.

To export content, on the landing page, click **EXPORT** to download the course in SCORM 1.2.

Note: Only published courses that are not duplicated from a Grovo course are available to export. All other courses are greyed out.

How Does this Enhancement Benefit My Organization?

Authors can now create more engaging and interactive content and reinforce knowledge at multiple points within a course. This allows for a more interactive learning experience for users.

Implementation

This functionality is automatically enabled for all organizations using the Create Tool 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 Edit Training 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>Note: 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</p>	Learning - Administration

	<p>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>	
Create Tool	<p>Grants access to Create Tool for content authoring. This permission cannot be constrained.</p>	Learning - Administration

Curriculum Player 2.0 - Milestone 2 (Open Beta)

With this enhancement, Curriculum Player 2.0 provides a modernized user interface (UI) that allows for an intuitive, straight forward path to the steps needed to complete a curriculum.

To enable this feature, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). Then, activate this feature in the *Activate Curriculum Player 2.0* section.

Once enabled, the following new features are part of Curriculum Player 2.0.

- Tests and Sections inside the new player
- Expandable child training table of contents
- Background polling to update transcript statuses
- Rich text formatting in training descriptions
- Redirect to post-completion activity

This enhancement is available in Stage on February 16th.

Tests and Sections Inside Curriculum Player 2.0

When a curriculum is launched that meets one of the following the requirements, clicking **Open Curriculum** in a user's transcript auto-launches the Curriculum Player:

- Online Courses
- Videos, Materials
- Tests and Sections

The legacy curriculum player is launched for all other curriculum.

Expandable Child Training Table of Contents

Expandable table of contents displays full child training titles and metadata.

Background Polling to Update Transcript Statuses

To optimize transcript status transitions:

- Background polling now updates transcript statuses every 3 seconds if a completion is detected.
- A new **EXIT COURSE** button manually terminates a session if the course needs to be exited in order to meet the completion criteria. This is a fail-safe for courses that require a manual termination.

Rich Text Formatting in Training Descriptions

Users can now use rich text formatting in training descriptions as follows:

- Bold
- Header
- Paragraphs
- Ordered and Unordered lists

- Pre-formatted text
- Emphasis
- Strong
- Italics
- Underline
- Deleted and Stikethrough
- Superscript
- Link

Important: *The backend setting to encode training text must be disabled for .html to render. This may be a security issue, so speak to your IT department before requesting this change. If you decide to make this change, contact Global Customer Support (GCS).*

Redirect to Post-Completion Activity

- Redirecting to the following post-completion activities is now supported:
 - Evaluations
 - Training Completion Signatures
 - Acknowledgements

If a training requires a post-completion activity, the **CALL TO ACTION** button in the Curriculum Player redirects to the appropriate page. When the activity is complete, learners are sent back to Curriculum Player 2.0.

Considerations

Important: *For the Rich Text Formatting in Training Descriptions feature, for .html to render in training descriptions, Corpsetting 'EncodeTrainingText' must be set to false. Customers must sign a liability and security warning in a Global Customer Support (GCS) case to change this backend setting.*

Implementation

- This functionality must be enabled in Feature Activation Preferences.
- If currently enabled in Stage, no action is required to use the new features.

Custom E-Signature Message for Sessions

Prior to this enhancement, Learning administrators using e-signature were unable to customize messages presented to Learners for Sessions.

With this enhancement, if an e-signature message is added to an event in the catalog, this custom message will be presented to the learner for the session. This ensures relevancy and clarity for the Learners signing a session completion message.

Administrators can enable this enhancement by going to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > DEFAULT TRAINING COMPLETION SIGNATURE](#). On the Default Training Completion Electronic Signature Preferences page, under Change Default to Course Catalog, click the **ACTIVATE** button. **Note:** *It is not necessary to check any of the training check boxes on this page as they no longer apply.*

Once enabled, the message shown to a Learner is the message configured for the specific Learning object in the catalog, or, if blank, the default division for their message.

If an event requires electronic signature but has no signature message configured, the Learner sees the default message configured for their Division under [LEARNING PREFERENCES > TRAINING COMPLETION SIGNATURE](#).

How Does this Enhancement Benefit My Organization?

- Administrators can use custom messages for e-signature for any LO object type.
- Learners now see a relevant message when signing for the completion of a session.

Considerations

This feature must be enabled on the Default Training Completion Electronic Signature Preferences page.

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
Default Training Completion Signature Preferences	Grants ability to manage Default Training Completion Signature preferences at the portal level. This enables the administrator to set the default setting for whether an electronic training completion signature is required. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

Essential Transcript Data Deletion for Compliance (Early Adopter)

Essential Transcript Data Deletion for Compliance (Early Adopter)

Prior to this enhancement, user’s Learning Transcript Data is not deleted even though User Anonymization/ Deletion mechanism is in place. This puts organization at Legal, Financial, and Compliance risk for mandates from countries with Data Privacy Acts .

With this enhancement, Essential Transcript Data Deletion provides organizations the ability to automatically delete User Transcript Data based on a defined retention period for inactive users in accordance with various regulations, such the EU GDPR and the Right to be Forgotten policy.

Important: To enable this enhancement, contact Global Customer Support (GCS).

Once enabled by GCS , administrators can activate this feature by going to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the Feature Activation section, for the Activate Learning Transcript Deletion Mechanism for Compliance area, click the **ACTIVATE** button. The following applies once activated:

- Data deletion respects the retention rule set at the Legal Entity Organizational Unit (OU) which users are part of at the time of the deletion.
- Automatic deletion applies to the transcript of inactive users who are terminated.

Deleted Data

The following Essential Transcript Data is deleted:

TRANSCRIPT PERIPHERAL DATA	TRANSCRIPT CORE DATA
Training Certificates	Transcript data for the transcript of the User (LO id, LO Title, subject, version etc.)
Attachments (OJT/ Express Class)	Transcript status (not started, pending approval, in progress, completed, etc.) and eventual scores
Comments (entered when assigning, approving/ denying, marking complete, updating transcript, exempting, removing, etc.)	Dates (assignment date, due date, completion date, etc.)
Evaluations	Active, Completed, Archived , Removed Transcript
Reporting	

Time-based Data Deletion

The following applies to time-based data deletion:

- Time-based deletion occurs automatically after a certain period. The execution itself is triggered on daily basis for Inactive User’s Learning Transcript Data based on the User’s termination date.

- The user must belong to a Legal Entity OU and must be inactive. Users should be assigned to the Legal Entity before their termination date.
- Data is erased permanently from the database and cannot be recovered. Data is also removed from the Reports.
- Customers must enable User data anonymization/ deletion prior to Time based activation for Transcript for each Legal Entity OU.
- Before opting-in for this process Customers must request via GCS one-time historical data cleanup for previously anonymized/ deleted users if they already use User anonymization/ deletion mechanism in their portal.

Implementation

This functionality is off by default. Contact Global Customer Support (GCS) to enable.

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

Essential Transcript Data Deletion for Compliance FAQs (Early Adopter)

Q: Do we need to perform a copy down to stage before enabling the feature for testing?

A: Yes, it's a best practice to perform copy down to stage before enabling the new feature in the stage portal for testing on the most updated data available in the Production portal.

Q: Will Transcript Deletion preserve statistics?

A: No, deletion does not preserve statistics.

Q: Will Transcript Data related to xAPI be deleted?

A: Yes, only xAPI records on the User transcript level would be deleted. Data under xAPI statement viewer/ LRS is out of scope of this release.

Q: Do we need to enable User Data anonymization/ deletion before Transcript?

A: Yes, it is mandatory to enable User Data anonymization/ deletion configuration with Legal Entity OUs/ settings/ retention period before opting for the time-based Transcript Data Deletion.

Q: Do we need to perform historical transcript data deletion for previously anonymized users prior to time-based transcript data activation?

A: Yes, it is mandatory to perform this one-time activity to avoid load on the system for first time enablement.

Q: Is it possible to restore data that has been deleted through the transcript data deletion functionality?

A: No, the purpose of deletion is that the data is gone, and Customers nor Cornerstone longer process or possess a person's transcript data. Be very careful and diligent when choosing retention periods, and to do proper UAT before deploying in production.

Q: What is the process for Customer to opt for automated time-based transcript data deletion?

A: First, the Customer must activate user data anonymization/ deletion mechanism, if already leveraging. Next, request historical data cleanup for previously anonymized users via GCS case/ work order. Finally, request the enablement of the feature activation preference visibility on the UI in the same case to toggle the preference for time-based.

Q: What will happen to the User Transcript and other screens post the data is deleted?

A: User's will have an empty transcript with data deleted from active, completed, archived and removed tabs as well as relevant reports and system areas like Session Roster Page, Curriculum Administration > View Users, etc.

Q: What happens if a person (by error) belongs to multiple Legal Entity OUs at the same time?

A: Transcript data generated during an overlapped Legal Entity window will have both Legal Entity tags associated and will be deleted based on the shortest retention period

Q: What happens if there is API Integration in place for Transcript Data?

A: API only returns transcript data for active users.

Express Class Definable Training Time

Express Class Definable Training Time

Prior to this enhancement, for Express Class trainees, there was no way to define the amount of time spent in training.

With this enhancement, learning administrators or training facilitators can define the actual time spent in training when submitting an Express Class, on both individual or bulk levels. Observed Training Hours and minutes can be defined for Express Class attendees, whose values can then be seen via the User Interface (UI) or in Reporting after completion.

To access this feature, go to [LEARNING > EXPRESS CLASS](#).

To define training time:

1. On the Express Class page, select **SEARCH EXISTING TRAINING** to locate the appropriate training or select **CREATE NEW TRAINING**.
2. On the Attendees page, select one of the following:
 - Add attendees: Add attendees manually via user selector. Selected attendees appear in the attendee list.
 - Upload Attendees: Select the Select File button to bulk upload attendees via .csv file. The .csv file now supports values for observed training hours and minutes. Note: If the .csv file has observed hours and/or training minutes columns, the values entered in those columns are pre-populated in the attendees list.
 - Identifier: In the Identifier column, enter one of the following identifiers for each user:
 - Username
 - User ID
 - Email Address
 - Status: In the optional Status column, enter the number that corresponds with one of the supported statuses:
 - 1 = Completed
 - 2 = Failed
 - 3 = Incomplete
 - Score: Commas are not supported by the optional Score field. Do not include commas in the CSV file. The score will appear on the Observation History page, available via Transcript Details.
 - Comments: Each optional comment can contain up to 3000 characters.
 - Observed Training Hours: Total time entered cannot exceed 99,999 hours
 - Observed Training Minutes: Any value over 59 will convert to hours and minutes, and the hours will be added to the value entered into the hours field (e.g. entering '999' minutes will convert to 16 hours, 39 minutes)
3. Click **Save**. The defined training is visible on the Observation History page for the completed training or in Reporting via the **Observed Training Hours** field.

New Reporting Field

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY	SECTION (UI GROUP)
Observed Training Hours	This column contains the Training Hours (if any) entered when completing an On the Job Training Material or the Observed Training Hours (if any) entered when submitting an Express Class completion. The column will be formatted as (HHHH:MM), and is not available for filtering.	Text	Learning	On the Job Training & Express Class	On the Job Training & Express Class

Considerations

- Observed Training Hours can be defined for existing and newly-created training.
- The Observation History page displays the Observed Training Hours defined via Express Class in the “Training Hours” field.
- The new “observedTrainingHours” property can be used to define hours and/or minutes spent in training via the Express Class API. Use ISO 8601 formatting, for example 1 hour and 30 minutes, is PT1H30M.

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
Express Class - Manage	Grants the ability to create and add users to an Express Class for a facilitated training session. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. This is an end user permission.	Learning - Administration

Express Class Definable Training Time FAQs

Supported Training Types

Q: What training types support this functionality?

A: All training types available for completion via Express Class (materials, tests, videos, events, and online classes).

Observed Training Hours and Minutes

Q: What are the maximum hours and minutes supported by this functionality?

A: The maximum total definable time is 99999 hours.

Q: Where can I see these hours and minutes after I define them?

A: On the Observation History Page of the completed training and through Reporting.

Q: Do these hours and minutes affect training hour counts on the Transcript or Learner Home?

A: No, they do not add to or affect these counts.

Q: Why not use the Training Hours property instead of the Observed Training Hours property?

A: Training Hours are meant to serve as a baseline estimation for how long training should take, and not as the literal time spent in training. This is why Training Hours are typically set during training creation, and Observed Training Time is set during training completion.

Transcript Time in Training (min) Property

Q: What happens to the “Transcript Time in Training (min)” values for Tests and Online Classes?

A: Tests and Online Classes populate the “Transcript Time in Training (min)” property automatically through their workflows. This functionality is not affected. Because Express Class creates a new registration for training completions, the “Transcript Time in Training (min)” field is not automatically populated for Tests or Online Classes when completed via Express Class, and only the Observed Training Hours are populated if defined. This means that there is no concern regarding doubled training time counts between both fields.

ILT

ILT – New Roster (Open Beta)

With this enhancement, the Attendance and Scoring tab is redesigned and provides the following new options:

- A unified event and session summary. Administrator can always see which session they are managing from this page.
- A consistent display of user information.
- The ability to filter by learner status.

Note: For this first phase, customers can access a view-only preview of the newly redesigned Session Roster main page in their Stage environments. The actions on this page are not yet available during this phase of the Open Beta. Other pages, such as the Attendance and Scoring page and the Waitlists page are not yet available to preview. Administrators and instructors can switch between the current Session Roster page and the redesigned Session Roster page preview by clicking a link in the top right corner of the Session Roster page.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Roster - 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

ILT Roster – New User Interface (Early Adopter)

With this enhancement, the ILT Roster user interface (UI) now has an modern look and feel! None of the functionality changes - the information is just clearer and modernized for ease-of-use.

To activate the new ILT Roster UI, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). For the User Interface Modifications - ILT Roster pages, click the **ACTIVATE** button.

If activated, the new UI appears for the following tabs and pages:

- Parent Roster tab
- Roster Assignments tab
- Roster Attendance and Scoring tab
- Waitlist page
- Exception Requests page

To view the new ILT Roster UI pages, go to [ILT > MANAGE EVENTS AND SESSIONS](#) and click the Roster icon. To view the new roster pages, select the **View new roster pages** link.

Note: For smaller screens, under *Display Orientation*, select *100% Scale & Layout* instead of the recommended settings.

Implementation

- Stage: This functionality is automatically enabled for all organizations by default.
- Pilot and Production: Off by default for all customers. Turn on in Feature Activation Preferences.

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,	Learning

	User Self and Subordinates, User, User's self, User's ILT Provider, ILT Provider, and Instructor.	
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	Learning - Administration

	roster page for sending such messages. This is an administrator/ILT instructor permission.	
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 the Events - View and Waitlists - View permissions. This is an administrator permission.	Learning - Administration
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

Reporting Fields - Learning

With the March '23 Release, new fields have been introduced to the Learning area of Reporting 2.0:

- Training > Training Details fields have been added
- Certifications fields have been added

Training Details

The following new fields have been added to the *Training > Training Details* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Default Language	This field displays the default language for the learning object.	Text
Original Approval Applied?	This field displays whether the training allows subsequent instances of the training to be approved based on the original approver.	Text
Multiple Assignments Allowed?	This field displays whether the training can be assigned to the same user more than once.	Text
Multiple Requests Allowed?	This field displays whether users can request the training more than once.	Text
Thumbnail URL	<p>This field may contain the Cornerstone system value that is generated when a file is added as a thumbnail to a learning object or a full URL entered by an administrator. The value in the thumbnail URL can be used to download the original thumbnail file or navigate to the originate URL. If the full URL path is not displayed, and this item has the Cornerstone-generated system ID, an example of the URL that could be used in conjunction with the thumbnail URL to download the original file is:</p> <p><code>https://[yourportalname].csod.com/clientimg/[yourportalname]/LoThumbnail_Upload/[Reporting 2.0 Thumbnail URL value]</code></p>	Text

Certifications

The following new fields have been added to the *Certifications* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Valid Until	This field displays the current expiration date for the current certification period.	Date

Implementation

Upon release, 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.

SCORM 1.2 Embedded Videos to Play Full-Screen

Prior to this enhancement, when viewing a SCORM 1.2 course, users were unable to view embedded videos in full screen.

With this enhancement, when the expand icon is clicked, SCORM 1.2 videos play in full screen.

This functionality will be available with the UAT3 stage deployment.

Implementation

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

Search Language Enhancements - March 2023

This enhancement improves search results and character recognition by utilizing new, specific analyzers for Korean, Japanese, and Chinese when the display language is set accordingly. In cases where special characters are used, search results are improved.

It may take up to 25 days for the update in functionality to be present in stage portals and up to 45 days for production portals.

How Does this Enhancement Benefit My Organization?

All users utilizing Enhanced Search and have a display language set to Korean, Japanese or Chinese will receive more accurate search results.

Frequently Asked Questions (FAQs)

Are there any visual changes associated with this update?

No visual changes are associated with this update.

How would I notice these enhancements?

The enhancements presented in this release are most noticeable in two scenarios.

1. When searching while the display language is Korean, Japanese, or Chinese.
2. When searching using certain special characters, such as a dash '-' or parenthesis '()'.

Are these enhancements available on all search pages in the application?

No. These enhancements are available in places where Enhanced Search is used and enabled within CSX Learning. Potential places for Enhanced Search to be used in your portal are: Learning Search Page, Express Class Search, Playlists, Global Search (Training), Course Catalog Search, and ILT: Manage Events and Sessions. Please check the administrative preferences in your portal to determine if you have Enhanced Search enabled in these pages, as some pages listed are configurable.

My search results are slightly different, even when my display language is not Korean, Japanese, or Chinese. Is that expected?

Search results may change slightly with this enhancement. To obtain better results when special characters are used, an upgraded analyzer has been implemented to interpret and process search queries.

Implementation

This functionality is automatically enabled for all organizations.

It may take up to 25 days for the update in functionality to be present in stage portals and up to 45 days for production portals.

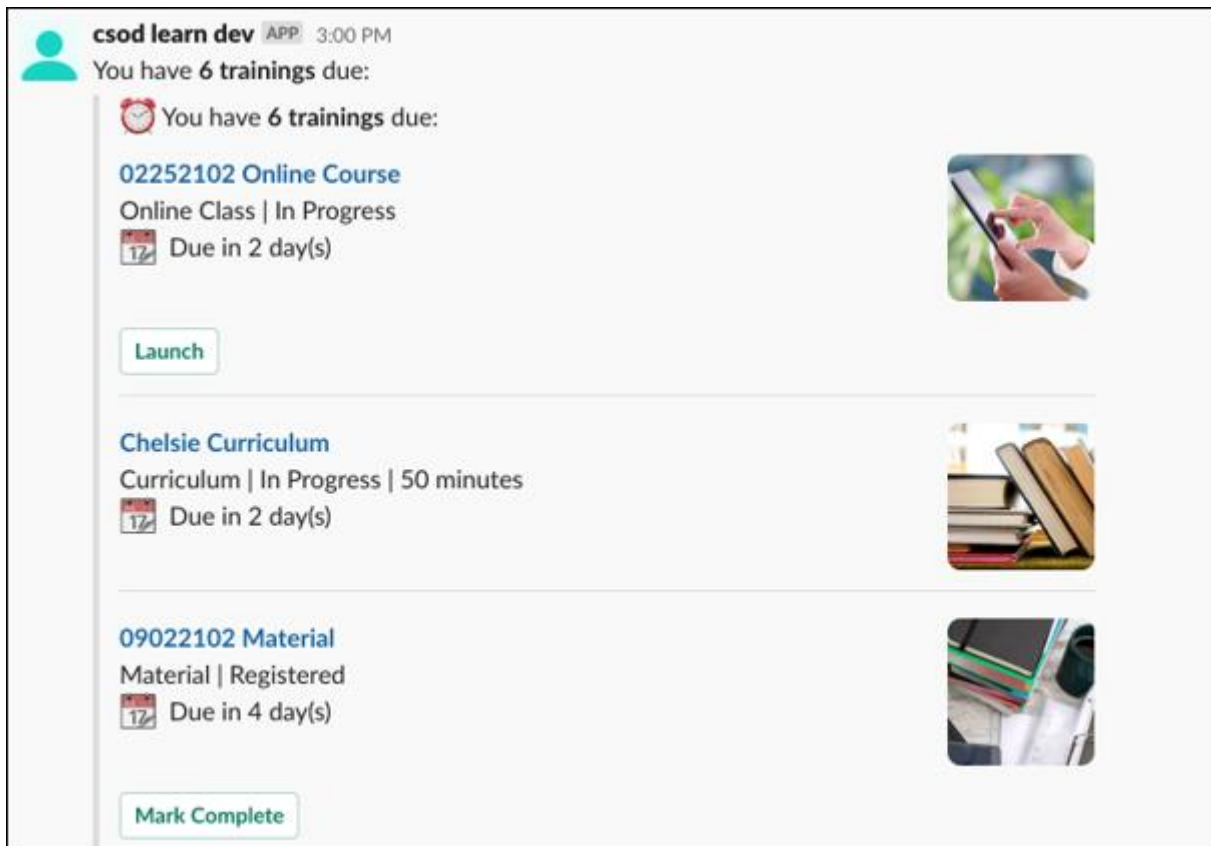
Slack Integration (Learning in the Flow of Work)

Learners often juggle between many applications that they must use for their day-to-day work. To simplify this experience and encourage learning, Cornerstone CSX can now integrate with Slack. When an organization installs the integration, a Slack chatbot pushes training reminders to learners in Slack, an app that they are already using.

Using the Slack chatbot, Learners can do the following:

- Search the Cornerstone training catalog using keywords
- Ask for a list of training due or past due (max 10 trainings returned)
- Launch and mark training complete
- Receive daily notifications (Monday - Friday) of past due and coming due training (up to 7 days)

The chatbot in Slack is easy to use. It has a Home tab where learners can view available commands and a Messages tab to send commands and view notifications received by the chatbot.



How Does this Enhancement Benefit My Organization?

This integration brings learning where your employees are while helping them remain up to date on required training. With this integration, learners gain self-service access to their CSX learning catalog and required training from within Slack.

Implementation

This integration is available for self-activation in Edge Marketplace.

This integration is not available for the Pilot environment.

Stripe – Payment Gateway

With this enhancement, Extended Enterprise customers can now use Stripe to process credit and debit card transactions in the portal.

The Stripe Payment Gateway integration with Cornerstone Learning is an API-based solution that provides users the ability to purchase courses offered through the e-commerce functionality available as part of the Extended Enterprise module (EXE).

Stripe provides the following key features:

- Transparent fee structure
- Fee calculation can be defined for each supported payment method as follows:
 - Percent applied over the purchase order total value
 - Fixed value
 - Formula, using the purchase order total value
- Easy administrator setup via Edge Marketplace
- High standards for fraud prevention
- 3DS/3DS2 Authentication

Considerations

- Customers must reach out to Stripe to create their account and request the following settings:
 - Stripe Account ID
 - Secret key
- The following features are not supported:
 - Recurring billing
 - Refunds
 - Tax calculations

Note: For tax calculations, a Cybersource account is required.

Implementation

- This functionality is enabled in the Edge Marketplace by Service Enablement team once the product is purchased.
- In Stage/Pilot, customers can enable this payment processor via EDGE.

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,	Edge

enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.

Upgrade Excel Format of Exports in ILT (Early Adopter)

With this enhancement, Excel download options for the ILT sign-in sheet and Roster export are upgraded with the extension .xlsx to make downloads easier to use for administrators and instructors.

The screenshot shows the 'Event' page with the 'Session Roster' tab selected. Under 'PARENT ROSTER', there is a dropdown menu showing '19528'. Below this, there are statistics for 'Inventory Unassigned (0)', 'Pending Payment (0)', 'Exception Requests (0)', 'Waitlisted (0)', and 'Reserved (0)'. There are two buttons: 'Printable Version' and 'Export to Excel', with the latter highlighted by a red box. Below the statistics is a table with columns: 'Session Status', 'Session Start Date', 'Session End Date', and 'Seats Available'. The table shows one row with 'Approved' status, start date '6/30/2022 2:00:00 PM', end date '6/30/2022 2:15:00 PM', and '20/20' seats available. At the bottom, there is an 'Attachments' section with a 'Choose File' button and an 'Upload' button.

The screenshot shows the 'Roster' page with a table of users. The table has columns: 'Name', 'User ID', 'Locator', 'Organizational Unit(s)', 'Email', and 'Attendance'. Two rows are visible: one for 'a v, shashank' and one for 'A. SelfregA'. To the right of the table, there is a dropdown menu for user actions, with 'Print Sign-In Sheet' and 'Print Multi-Part Sign-In Sheet' options highlighted by a red box. Other options in the menu include 'Email Registered Users' and 'Withdraw / Move Users'. Above the table, there is a 'Download Bulk Add Users' template button and a 'Choose File' button.

Considerations


Additional exports are targeted to be upgraded in future releases.

Implementation

The availability of this functionality is controlled by a backend setting, which is enabled by default in Stage environments and disabled by default in Pilot and Production environments. To enable this functionality, contact Global Customer Support.

Versioning Redesign Enhancements (Early Adopter)

With this enhancement, new Curriculum Versioning workflows provide consistent and reliable behavior when a Curriculum child Learning Object (LO) is versioned or Curriculum structured is modified simultaneously. The new workflows ensure that the Versioning and Assignment process happens is correct and consistent. Additionally, an icon is available on the Curricula Administration page that lets administrators know that versioning is still in progress if versioning happened through an administrator's structure changes.

- To enable this enhancement, administrators can go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES](#). In the Activate New Versioning Enhancements area, click the **ACTIVATE** button.
- To view the Curricula Administration page, administrators can go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CURRICULA](#). The versioning icon  appears in the **Options** column, where applicable.

Considerations

- This enhancement is available only in the Stage portal via the feature activation preference for enablement.
- Cornerstone will communicate detailed Production Deployment Plan at a later stage.
- Only Curriculum Admin Versioning, Child LO versioning – (Online LO, Material LO/ DMS workflows) are supported.
- This enhancement is specific to the back-to-back versioning scenarios leading to versioning inconsistencies for Curriculum admin and Curriculum Child LO workflows leading to User assignment issues.
- If a child LO is removed from the Curriculum structure by an administrator and at the same time, child LO versioning (CVR) requests comes for same LO, the child LO no longer exists in the Curriculum Structure, so the Curriculum versioning will not happen.

Implementation

- This functionality is automatically enabled for all organizations using the Learning module. Additionally, customers must self-enable the feature in Feature Activation Preferences in Stage Portal.
- This enhancement will be auto-enabled for all customers in the July 2023 release, and it is mandatory to test all the scenarios during the extended UAT cycle ending 31st March.
- To enable in Production before the July 2023 release, contact Global Customer Support (GCS) if all testing and validations are complete in the Stage UAT cycle.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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<p>Curricula Admin - Manage</p>	<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>Tip: 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>	<p>Learning - Administration</p>
<p>Curriculum Admin - View</p>	<p>Grants view only access to curriculum details via Curriculum Administration screen. Does not include ability to view details of users enrolled in curricula. This permission can be constrained by Provider, OU, User's OU, and User's LO Availability.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p> <p>Tip: 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>	<p>Learning - Administration</p>
<p>Curriculum Owner</p>	<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>	<p>Learning - Administration</p>
<p>Curriculum Player Options</p>	<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>	<p>Learning - Administration</p>
<p>Enable Curricula Auto-Launch Option</p>	<p>Grants ability to enable the curricula auto-launch feature via the Structure step when creating or</p>	<p>Learning - Administration</p>

	editing a curriculum. This is an administrator permission.	
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

View and Edit Test Versions with a Future Effective Date

Prior to this enhancement, Test Engine administrators were unable to see test versions queued with a future effective date which allowed the creation of multiple versions with the same effective date. This caused downstream issues and test launching errors for Learners.

With this enhancement, the Test Engine list view displays **Pending** for test versions with a future effective date, along with who created them, their effective date, and what its structure contains. Administrators can check the structure to affirm its accuracy and modify if needed.

Additionally, the system no longer allows test versions to have the same effective date. Once a pending version with a future effective date is queued, all subsequent versions must have an effective date after the pending version. This ensures that version numbers stay in ascending order.

Deleting a pending version removes it from the Test Engine list and marks it "deleted" on the backend.

To view the Test Engine page, administrators can go to [CONTENT > TEST ENGINE](#).

Implementation

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

Permissions

The following existing permissions apply to this functionality:

Permissions

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
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Performance

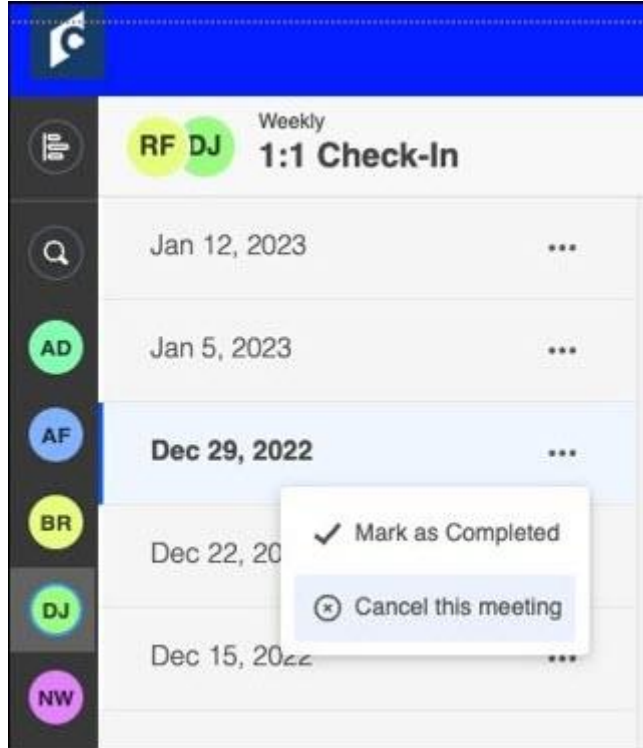
Check-Ins Enhancements

Check-Ins Meeting Statuses

Prior to this enhancement, administrators were only able to report on created Check-Ins or Check-Ins that have content.

With this enhancement, managers and employees can mark meetings complete or cancelled. This allows administrators to report on the use of Check-Ins in their organization.

This enhancement is available in Stage on February 16th.



On the meetings and topics page, users can select "Mark as Completed" or "Cancel this meeting". All meetings are open by default.

The following applies to meeting statuses:

- Only check-in meetings that have content can be marked as complete.
- Participants can edit the notes of a check-in meeting when a meeting is completed or cancelled.
- Users can view status details on the Modification History page.

New Reporting Field

The following reporting field is now available:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY	SECTION (UI GROUP)
Meeting Status	Meeting Status indicates if a Check-In meeting is	String	Performance	Check-Ins	Check-Ins

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY	SECTION (UI GROUP)
	open (not completed), has been completed or cancelled.				

New Email Tag

A new email tag [**Meeting.Status**] is added to the email digest. If configured, a user can see the status of their meeting, their recent meetings, and upcoming and missed meetings.

How Does this Enhancement Benefit My Organization?

- Administrators can track the completion rate of check-ins in their organization to confirm conversations between an employee and manager.
- Managers and employees are accountable for regular check-in meetings.

Implementation

This functionality is automatically enabled for all organizations using the Check-Ins module.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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>Note: <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:</i></p>	Performance

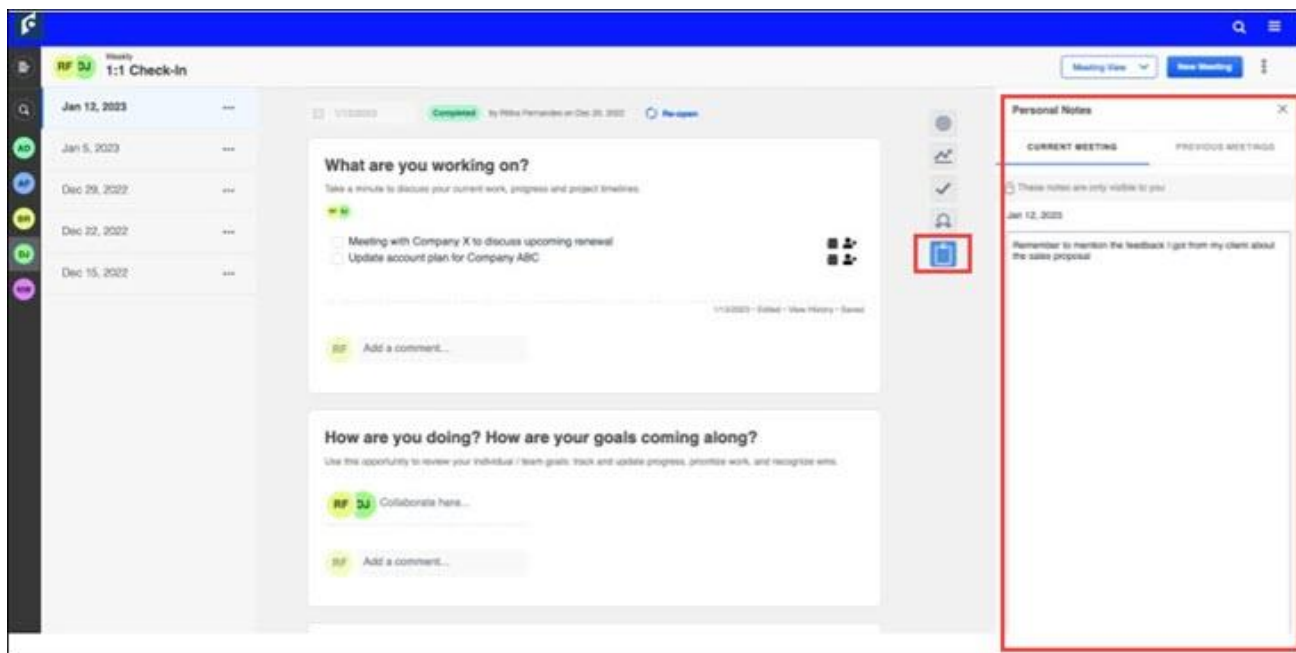
	<p><i>Detail Supervisor" means that the Detail Supervisor can create a Check-In with their indirect subordinate but the indirect subordinate cannot create a Check-In with their Detail Supervisor.</i></p>	
<p>Email Digest Administration - Manage</p>	<p>Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission.</p>	<p>Performance - Administration</p>

Check-In Personal Notes

Prior to this enhancement, any notes made by a user on the meetings and topics page were visible to all participants in the meeting.

With this enhancement, users can create personal notes that are not visible to anyone except the writer of the note. This allows managers and users to create personal notes that they may want to refer to during the meeting or take personal notes during the meeting for future reference. Users can view or edit their previous notes at any time. The previous notes for the last three months are available by default.

This enhancement is available in Stage on February 16th.



To access the personal notes feature, from the meetings and topics page, select the notes icon. The Personal Notes flyout opens.

- **To create a personal note:** On the Current Meeting tab, type your note(s). The note is automatically saved. Notes are accessed on the Current Meeting tab only on the day it is created. After that, it displays on the Previous Meeting tab.
- **To edit a previous note:** Select the Previous Meetings tab. Select a date range to filter the notes. Click the appropriate note to edit it. Click **SAVE** when you are done editing.
Note: For filtering, there is a range limit of 12 months.

Considerations

- Personal Notes are not reportable in Reporting 2.0 at this time.
- Follow ups are not included in the rich text editor for 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>Note: <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 Usability Enhancements

There are two new enhancements to improve the user experience and usability for Check-Ins users:

- Launch skills feedback requests and ratings from Check-Ins.
- Improved experience for administrators uploading guidance files to a template.

This enhancement is available in Stage on February 16th.

Launch skills feedback requests and ratings from Check-Ins

With these enhancements, users can rate their interest in a skill and managers can rate an employee's proficiency for a specific skill.

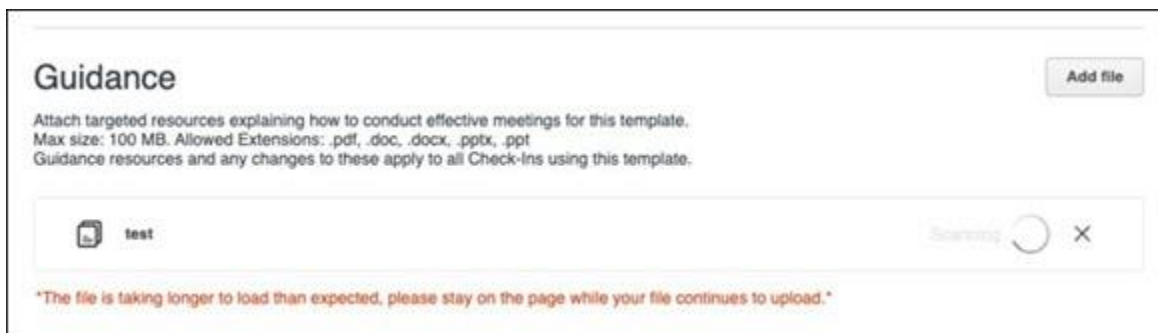
To access this functionality, from the Check-Ins meetings and topics page, select the Skills icon. The Skills Profile flyout opens.

- **To rate interest in a skill:** In the Skills You Want to Develop section, select a skill. From the drop-down, select **Rate My Interest**. On the self-rating window, click Start and answer the two questions. A user can view their interest ratings and proficiency ratings by opening the skills panel and clicking the skill they have rated. The user must click on **self** in the graph to view their proficiency and interest ratings as well as any comments related to that skill.
- **To rate an employee's proficiency:** In the Current Skills section, select a skill. From the drop-down, select **Rate Proficiency** to rate the employee's proficiency. Feedback can be private or public. Once the rating is launched, the manager can rate the selected skill.
- **To request feedback:** From the Skills You Want to Develop section, complete the Request Feedback form and select **SAVE**. The recipient of the request can view the request in their Universal Profile on the Actions Tab.

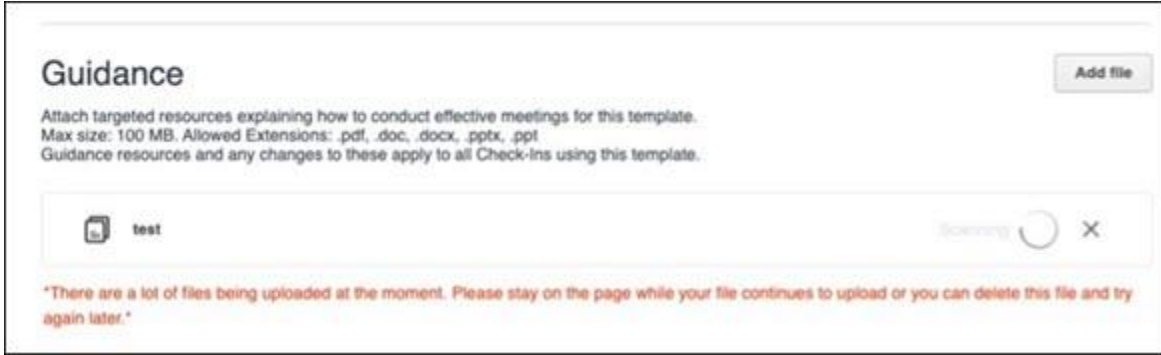
Uploading Guidance Files to a Template

To provide clear information before administrators upload guidance files to a template, the following new error messages appear:

- If the file takes more than a minute to scan, the following message appears:



- If the file takes more than five minutes to scan, the following message appears:



Implementation

This functionality is automatically enabled for all organizations using the Check-Ins module.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Reporting Fields - Check-Ins

With the March '23 Release, new fields have been introduced to the Check-Ins area of Reporting 2.0:

- Check-Ins fields have been added

With this enhancement, the following new field is added to the *Check-Ins* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Check-In Meeting Status	This field displays the status of a check-in meeting.	Text

Implementation

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

Permissions

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

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

Competency Enhancements

Competency Experience Improvements

Prior to this enhancement, some actions related to in-progress observation checklists and competency assessment tasks could be taken safely without causing issues for users.

With this enhancement, additional actions are now available for in-progress observation checklists and assessments.

Modify "Show Assessee/Manager Results from" for In-progress Competency Assessment Tasks

Administrators can now modify the **Show Assessee/Manager Results from** settings for in-progress competency assessment tasks.

To access Competency Task Administration, go to **ADMIN > TOOLS > PERFORMANCE MANAGEMENT > COMPETENCY ASSESSMENT TASKS**.

Competency Preference

This task is currently in progress. Limited changes can be made for this task.

1. General | 2. Competency Model | **3. Competency Preference** | 4. Assessment Result | 5. Availability | 6. Confirm

Preferences - Competency Assessment

Assessment Recipients:

Relationship	Weight (%)
Self	30
Manager	30
Peer Group 22	40

Include all approved assessors Allow **Self** to select assessors

Show Assessee/Manager results from:

Self Manager Peer Group 22

Allow assessors to enter comments for each item
 Allow assessors to enter comments for each competency

Minimum # of Respondents to Display Avg. Results

Peer Group 22: 1

Comment Visibility

Comments: By Minimum Respondents By Date

If a group does not meet minimum # of respondents:

Hide Group comments from the Assessee/Manager.
 Display comments from all relationship groups anonymously to the Assessee/Manager.

Review Allowed: Outside of the assessment process, allow users to review assessments they have completed

Save Progress: Allow the assessor to save any progress and return to the assessment at a later point

Compare: Allow a user to compare their assessment scores with other competency models

Manager Overwrite Average Scores: Allow Manager the ability to overwrite the average score for this task

Target Scores: Display target scores for each competency to the user on the Competency Summary page.

Freeform Questions: Include freeform questions at the end of the assessment.
question 1

Development Plan:


A development plan will not be created from this assessment.
 Auto create development plan based on recommended development actions
 Allow users to select development actions to add to their development plan.

« Back | Done | Next »

Delete Certain LO-Based Observation Checklists

When viewing the details of a LO-based (Learning Object) observation checklist, administrators can now delete an assignment for a user when the following criteria is met:

- The LO checklist is not in a completed status.
- The LO checklist was assigned to the user through a curriculum or certification that no longer has the checklist as part of the structure.
- The LO checklist was assigned to the user through a curriculum or certification that was removed from the user and no longer has the checklist as part of the structure.
- The user does not have the same checklist as part of multiple curricula or certifications.

To view the details of an observation checklist, go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > OBSERVATION CHECKLISTS](#). Then, click the View Details  icon in the Options column next to the checklist.

Implementation

This functionality is automatically enabled for all organizations using competencies and LO-based observation checklists.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Competency Assessment Task Administration	Grants ability to create/assign competency assessment tasks and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Performance - Administration
Observation Checklist Admin - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
Observation Checklist Admin - View	Grants access to view observation checklists. This permission also enables user to see progress of all users assigned to a given checklist. This is an administrator permission.	Performance - Administration

Reporting Fields - Competencies

Prior to this enhancement, the name of the Reporting 2.0 field “Competency Item Assessor ID” did not describe the output value correctly.

This enhancement renames the “Competency Item Assessor ID” field to “Competency Item Anonymized Assessment ID.” The revised field name more clearly describes the value included in the output.

Considerations

This change in the field name impacts existing reports.

Implementation

Upon release, 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.

Goals Enhancement

Reporting Fields - Goals

With the March '23 Release, new fields have been introduced to the Goals area of Reporting 2.0:

- Goals Targets > Targets fields have been added
- Goals Tasks > Tasks fields have been added

Targets

The following new fields have been added to the *Goals Targets > Targets* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Target Status	This field displays the current status of the target.	Text

Tasks

The following new fields have been added to the *Goals Tasks > Tasks* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Task Status	This field displays the current status of the task.	Text

Implementation

Upon release, 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.

Performance Reviews Enhancements

Review Task Central (Early Adopter)

Task Central is targeted to be available in production and pilot environments, in the April 14 patch.

With this enhancement, the new Review Task Central provides reviewers an easy way to view, submit, and calibrate all their assigned steps in one location.

Additionally, a new upgraded, intuitive user experience provides clarity on what performance tasks are due and where to find them.

Once an administrator enables this feature, users can use Task Central to:

- Filter review status
- Search for reviewees by name
- View all previous off-cycle tasks

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.

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 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 new status as follows:

- 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 represent 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.

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

Reviewers 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.

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”.
- During the early adopter period, Review Task Central does not support the following:
 - Discuss or decline review functionality for off-cycle tasks.
 - Review previews.
- During the early adopter period, only the following links are available under the options menu in the review:
 - Add co-planner
 - Attachments
 - Employee details
 - Print review
- Review Task Central only supports review step assigned and step due emails.
- Tags in Task Administration cannot be used for Task Central/

Implementation

- Self-Activation: Prior to the April 14 patch, Review Task Central can be activated in the stage environment via the “Activate Review Task Central” button on the Performance Review Task Administration screen. If a stage portal had previously activated Review Task Central, it will remain active in those portals – they will not have to self-activate again. Review Task Central is not available in production and pilot environments until the April 14 patch.
- With the April 14 patch: Review Task Central can be enabled using a new Feature Activation page available via the Admin > Tools > Performance Management navigation path. The button to activate Review Task Central will be available in the new Feature Activation page. A new permission will be added to the System Administrator role to control access to this page. Stage portals that had previously enabled Review Task Central will not have to re-enable it again – it will remain active if previously enabled in stage.

Once enabled, Review Task Central cannot be disabled. Once enabled, all tasks created post-enablement will use the new Review Task Central user interface (UI). Tasks that are using the new Review Task Central UI will have a green check mark next to the name of the task.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who 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
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	Performance - Administration

pages. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.

Bulk Reopen Performance Review Steps (Early Adopter)

Bulk reopen is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.

Prior to this enhancement, a reviewer 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, a reviewer can 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.* Additionally, comments about why someone is reopening are visible in Review Task Central.

To enable this feature, administrators can go to [PERFORMANCE REVIEW -TASK ADMINISTRATION](#), select the Review Workflow tab, then check the **Allow the Reopener (Manager, Indirect Manager, and any Custom Relationships to reopen steps)** box. This allows the Bulk Actions to appear in Review Task Central.

Once enabled, on the Bulk Actions screen:

1. Select the Reopen tab.
2. Select a step or search for a step and select it.
3. Click the check-boxes for one or more users.
4. Click the **REOPEN STEPS** button. A Reopen Step window opens.
5. In the **Comment for Reviewer** box, enter the reason for reopening this step.
6. Click the **REOPEN STEP** button. The reopen information is displayed in the reopen table, including the comment. **Note:** *During processing, the reviewer cannot navigate away from the page.*

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.

How Does this Enhancement Benefit My Organization?

- Reviewers can reopen a review step for multiple reviewees at once, which saves time during the busy review season.
- Assignees can view the reopen reason directly on 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 submit action.

Implementation

This functionality is automatically enabled for all Task central EA customers.

Skills in Performance Reviews (Early Adopter)

Skills in performance reviews is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.

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. The Skills Review section:

- Integrates a user's skills profile into performance reviews and updates the skills profile as part of a performance review task.
- Allows a user's skill proficiency to be rated from within a review.
- Allows manager/user to add custom questions to the Skills Review section.

Administrators can enable this 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 **SKILL COMPONENTS** button appear.

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.

Note: *Review Task Central must be enabled to use Skill Assessment.*

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.
- 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 to 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

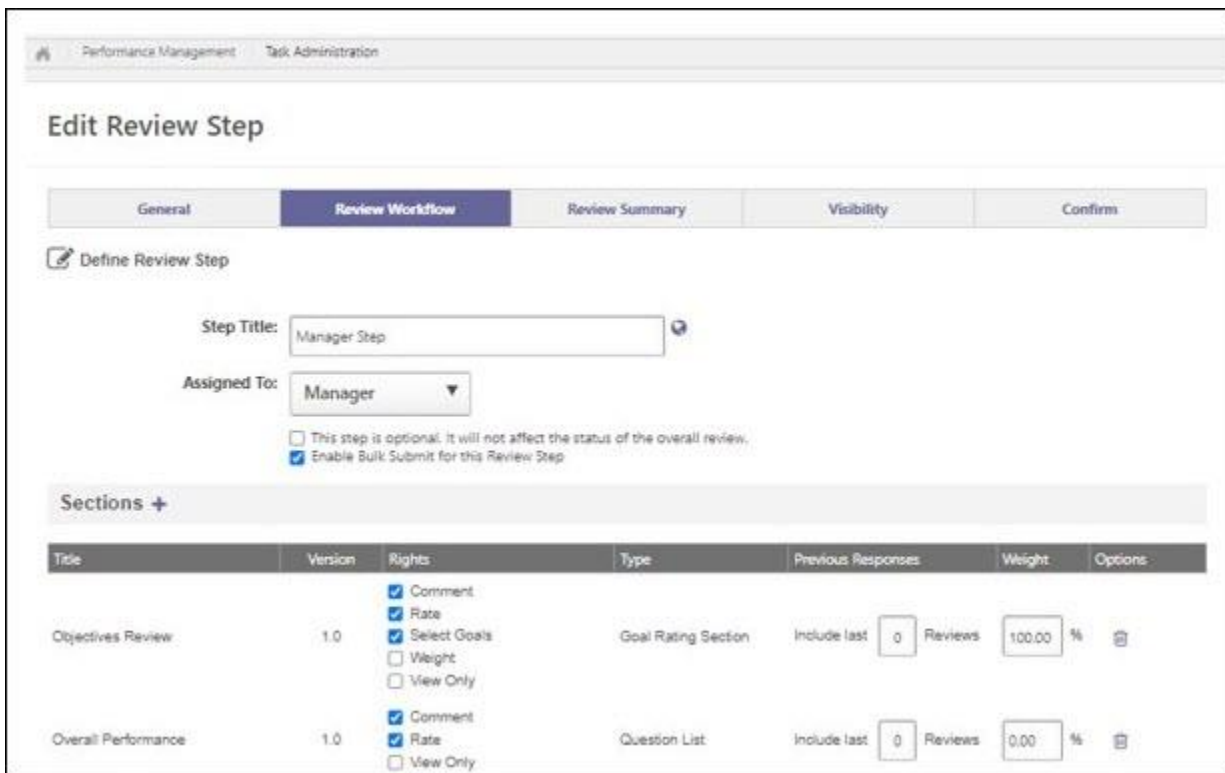
Task Central – Bulk Submit (Early Adopter)

Bulk submit is targeted to be available in production and pilot environments, along with Review Task Central, in the April 14 patch.

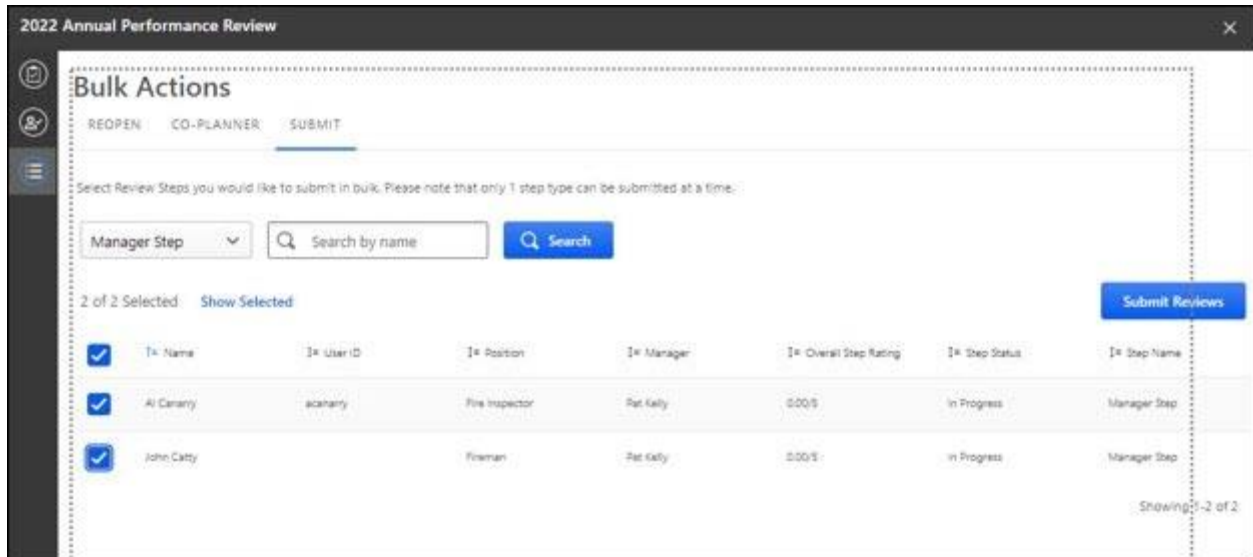
Prior to this enhancement, managers were able to submit one review step per reviewee, which was inefficient and did not allow the manager to check their work or ensure cross-team equity before submitting the review.

With this enhancement, a new Bulk Actions page allows reviewers to see which reviews are ready to submit and the overall rating for those reviews.

Administrators enable bulk submission by going to [PERFORMANCE MANAGEMENT > TASK ADMINISTRATION](#) and selecting the Review Workflow tab. In the Define Review Step section, click the **Enable Bulk Submit for this Review Step** check-box.



Once bulk submit is enabled, the Bulk Submit tab displays on the Bulk Actions Page in Task Central.



To bulk submit:

1. Click the **Submit** tab to view all available reviews.
2. Select a review step. This enables the selection check-boxes.
3. Select one or more reviews to submit.
4. Click **SUBMIT REVIEWS**. A notification message appears.

Once processing is done, a success message, a partial success message, or a failed message appears.

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.

How Does this Enhancement Benefit My Organization?

Reviewers can clearly see what steps are not complete and informally calibrate reviews before submission.

Considerations

- Bulk Submit supports 1,000 users per bulk submit action.
- 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.

Implementation

Bulk Submit is only available to customers who activate Task Central.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who 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
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

Update Rating Scale in Review Tasks

Prior to this enhancement, customers had to submit a work order to update the title and description of a rating scale after a review is launched.

With this enhancement, administrators can edit the title and description of a Rating Scale on the Task Administration page. Once saved, the updates appear immediately on the Define Rating Scale page and users can see the updated ratings once they refresh the Review Task .pdf file.

To update the Rating Scale title and description, administrators can go to [ADMIN > PERFORMANCE MANAGEMENT > TASKS](#) and select the icon next to Overall Rating Scale. An editable Define Rating Scale window opens where you make and save the changes.

Users can see the updated rating when they generate a review task .pdf from the Define Rating Scale page.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review 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

Succession Enhancement

Reporting Fields - Succession

With the March '23 Release, new fields have been introduced to the Succession area of Reporting 2.0:

- Succession Task fields have been added

Succession Task

The following new fields have been added to the *Succession Task* section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Task Start Date	This field displays the date when the succession task is set to begin.	Date
Task End Date	This field displays the date when the succession task is set to be completed.	Date

Implementation

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

Permissions

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

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

Recruiting

Broadbean Integration Location Data Enhancement

Prior to this enhancement, Recruiters had to manually updated the candidate's location information on the Broadbean job boards even though they previously added location information to the requisition.

With this enhancement, the Location field in Broadbean is automatically populated with the location information provided in the requisition.

To access Broadbean features, users with appropriate permission can go to [RECRUIT > MANAGE REQUISITIONS > EDIT POSTING > JOB BOARDS > BROADBEAN](#).

Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '23 Release

The ability to perform Requisition Template data loads using DLW will be deprecated with 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 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 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:

ÿ Support Feeds for Requisition Template load in Edge Import

Phase 4 – November '23 Release:

ÿ Stop support and remove all remaining access to DLW Requisition Template loads.

Email Templates and Send Email from Manage Candidates Enhancements

Prior to this enhancement, job alert emails were sent using a generic template that did not allow customer branding.

With this enhancement, several updates are now available that benefit administrators, recruiters, and applicants.

- Administrators can now:
 - Create, edit, activate, deactivate, and delete internal and external job alert templates.
 - Use custom templates to configure emails for Manage Candidates.
 - Configure display names fields in the job alert templates.
 - Request that Global Customer Support (GCS) configure email address subdomain.

To access and configure email templates, administrators can go to [ADMIN > RECRUIT > EMAIL TEMPLATES](#).

- Recruiters can now:
 - Use their organization/portal name in the email address as subdomain for branding purpose. For example, if the portal name is *shopnow*, the default subdomain email address is: **jsmith@shopnow.recruitmail.com**
 - Use html source code to send email from the Manage Candidates page.
 - Use the Rich Text Editor (RTE) to preview email and view source code.
- Candidates now receive customized emails that contain a subdomain email address, if applicable.

To manage templates, recruiters can go to [MANAGE CANDIDATE > SELECT ANY CANDIDATE > SEND EMAIL](#). Then choose the appropriate template.

How Does this Enhancement Benefit My Organization?

This enhancement allows customers to configure their own Job Alert templates to align with their brand. Adding a subdomain address helps candidates identify that the email is from a trusted source.

Considerations

- Users can only view contents of Standard Internal/External Job Alert templates.
- Only active templates can be associated to career sites.
- A template assigned to any career site cannot be deleted.
- To create a job alert, the template category must be Internal Job Alert or External Job Alert.
- The domain “recruitmail” cannot be configured.
- By default, the subdomain is set with the portal name. Contact Global Customer Support (GCS) to change the subdomain . **Note:** *English letters, numbers and hyphens (not at the start or end) are acceptable for subdomain names.*

- Localization:
 - When creating a template, create a default language template first, followed by other language templates.
 - Templates display based on the language of the logged-in user. If a template is not configured in that language, then the title of the template is displayed in the default language.
 - Activating or inactivating a template applies to the selected template in all languages. It is not possible to activate/inactivate a template in a specific language only.

Implementation

- This functionality is automatically enabled for all organizations using the Recruiting module.
- At this time, customers on SL4 environment cannot receive emails sent from Job Alerts on Mobile-Friendly Career Site.

Permissions

The following existing permissions apply to this functionality:

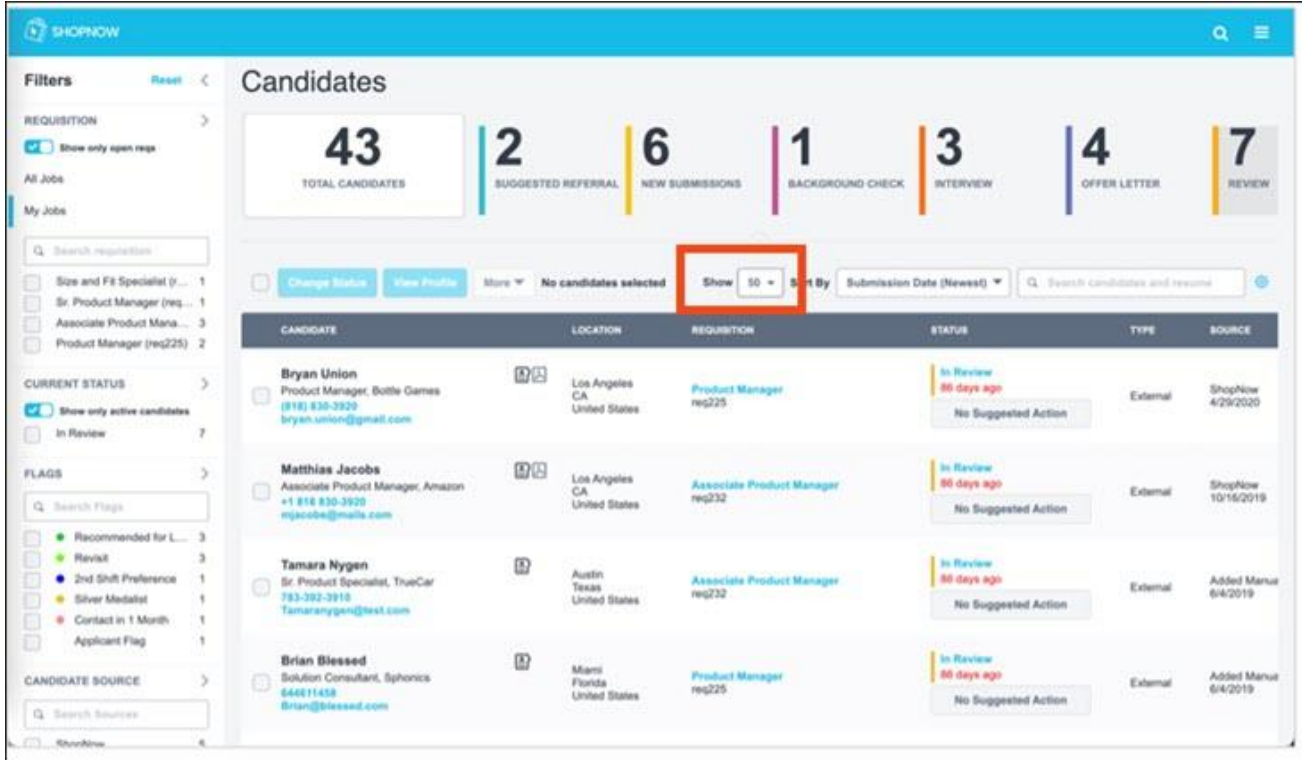
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Recruiting Configure Email Templates- Manage	Grants ability to configure email communication templates. This permission cannot be constrained. This is an administrator permission.	Recruiting

Note: This permission is enabled by default for Recruiting Admin, Cornerstone Admin, and System Admin roles for all customers.

Extend Bulk Selection on Manage Candidates Page (Early Adopter)

Prior to this enhancement, on the Manage 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.



Implementation

To enable this functionality, contact Global Customer Support (GCS).

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

<p>Applicants: Comments - Manage</p>	<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. Note: <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></p>	<p>Recruiting</p>
<p>Applicants: Comments - View</p>	<p>Grants ability to view comments for applicants.</p>	<p>Recruiting</p>
<p>Applicants: Status Change</p>	<p>Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.</p>	<p>Recruiting</p>
<p>Requisition: Manage</p>	<p>Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.</p>	<p>Recruiting</p>
<p>Requisition: Owner</p>	<p>Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained.</p> <p>Note: <i>This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the Requisition: Manage permission</i></p>	<p>Recruiting</p>

*override 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.*

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.

Knowledge article: [**How to migrate \(or enable\) from Google Universal Analytics to Google Analytics 4**](#)

Increase Flattened Application Page Limit Per Document (Beta)

Prior to this enhancement, when candidates wanted to submit long documents with their job applications, such as a thesis, recruiters were unable to review these documents if they had more than 10 pages.

With this enhancement, customers can increase the page limit to 20 pages by contacting Global Customer Service (GCS). Once the page limit is increased, recruiters can view up to 20 pages for each uploaded applicant document in a flattened application. **Note:** *The document should be 20 or less pages and if it is over 20 pages then it cannot be viewed.*

Considerations

Changes in the configuration will not impact previously generated flattened applications and changes are visible only on flattened applications generated after the changes.

Implementation

Customers who want to be included in this beta can contact GCS.

Introduce Profile User Phone Tag to Interview and Offer Letter Email Templates

Prior to this enhancement, the candidate's phone number was only available on the candidate's profile.

With this enhancement, a new tag, PROFILE.USER.PHONE can be used in email templates, and when resolved, provides the candidate's phone number in notification emails.

How Does this Enhancement Benefit My Organization?

Stakeholders, such as interviewers and hiring managers, can view a candidate's phone number in the notification emails without going back to the candidate's profile for the number.

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
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. <i>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</i>	Recruiting

*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.*

Job Alerts on Internal Career Site

Users want to know when a relevant job is posted to their Internal Career Site and recruiters want users to apply quickly to fill new roles and promote internal mobility.

With this release, Administrators can enable job alerts for internal career sites and provide an email template with the appropriate job alert details.

When enabled, users can define job alerts to notify them by email when jobs are posted that match their job alert search criteria.

Administrators

On the Internal Career Site Preferences page, administrators can:

- Select Enable Job Alerts to allow users to receive job alert notification emails.
- Select the standard template or a customized template to define the information included in the email.

Administrators must enable job alerts for each internal career site that requires it.

Users

On the user's Internal Career Site home page, users can:

- Create an alert using keywords, location, or additional filters.
- Provide an alert title and how often they want to receive emails that matches their search criteria.

Based on the template the administrator selected, job alert email messages may include sender, subject, job alert title, user's name, a View Job button for each matching job, and an Unsubscribe link. Job alert email is only sent when there are jobs posted that match the job alert search criteria.

On the My Jobs page, in the new My Alerts section, users can:

- View a list of job alerts created on the Internal Career Site.
- Modify the Title and Frequency of an alert.
- Unsubscribe from a job alert. Unsubscribed job alerts cannot be restored.

The My Alerts section contains job alerts created on Internal Career Sites and Mobile-Friendly Career Sites.

Considerations

Customers on SL4 environment cannot receive emails sent from Job Alerts on Internal Career Site.

Implementation

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

Permissions

The following existing permission applies to this functionality:

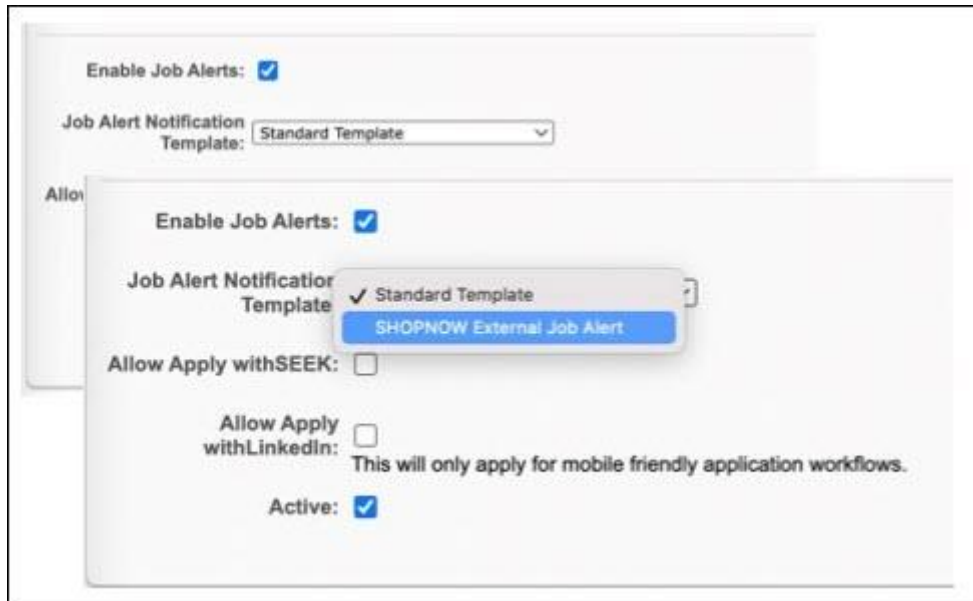
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

Job Alerts Templates for Mobile-Friendly Career Sites

Prior to this enhancement, job alert email notifications were sent to candidates using a standard email template.

With this enhancement, recruiting administrators can assign customized external job alert templates to the mobile-friendly career sites.

To customize email templates, administrators can go to: [ADMIN > TOOLS > RECRUIT > CAREER SITE >](#). On the Settings page, locate **Enable Job Alerts**.



With job alerts enabled, the External Job Alert option appears, which allows the administrator to access and customize a template for mobile-friendly career sites. Based on the site where the job alert is created, job alert notifications are sent using the selected customized template. **Note:** *To create custom email templates, go to ADMIN > TOOLS > RECRUIT > EMAIL TEMPLATES.*

How Does this Enhancement Benefit My Organization?

- Recruiting administrators can customize job alert notification emails to enhance the candidate experience and align them with their brand.
- Candidates enjoy a consistent experience on mobile-friendly career sites, from navigation to job alert notification emails.

Considerations

Customers on SL4 environment cannot receive emails sent from Job Alerts on Internal Career Site.

Implementation

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

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

Manage Job Alerts in My Profile

Candidates need a convenient location to view their job alerts created on mobile-friendly career sites.

With this enhancement, candidates can view these alerts, edit them, and unsubscribe in the new My Alerts section on their My Profile page.

For each job alert created on mobile-friendly career sites, candidates can:

- Modify the title and frequency of the job alert.
- Unsubscribe from a job alert. Unsubscribed job alerts cannot be restored.

How Does this Enhancement Benefit My Organization?

Candidates can effectively manage all job alerts on their My Profile page.

Considerations

Customers on SL4 environment cannot receive emails sent from Job Alerts on Internal Career Site.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

Support Break Lines in Comments

Prior to this enhancement, long comments written on a Comments page did not include break lines, which made the comments unwieldy and difficult to read.

With this enhancement, to make comments easier to read, break lines are supported on the following pages:

- Applicant Profile page - On the Comments tab.
- Manage Candidates - View Profile page.
- Manage Candidates - Request Candidate Feedback page.

Use the <Enter> key on your keyboard to insert break lines.

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: 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. Note: <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
View Private Comments	Grants ability to read all advance/do not advance feedback when reviewing candidates in Manage Candidates.	Recruiting

Request Candidate Feedback Search	Grants users the ability to utilize the Request Candidate feature to search for users to share candidates. This permission can be constrained and is connected to the user OU service.	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>Note: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the Requisition: Manage permission overrule those of the Requisition: Owner permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting

Transferring Offer Letter and CV to Universal Profile

Prior to this enhancement, when a candidate is hired for a requisition in the system, a Human Resources (HR) administrator had to manually save their offer letter and resume to their Snapshot page.

With this enhancement, the HR administrator can create folders where the candidate's offer letter(s) and resume(s) are automatically uploaded to the user's Universal Profile Snapshot Documents tab on their start date. Documents display an ID number, **Upload Date**, and **Uploaded By** information.

To create the offer letter and resume folders, HR administrators can go to [ADMIN > TOOLS > RECRUIT > GENERAL PREFERENCES > DIVISION > STORAGE DESTINATION](#) and click the **SELECT FOLDER** button. The designated folder must be available currently on the user's Universal Profile Snapshot Document tab.

Note: *User's must have appropriate permission to access these folders.*

How Does this Enhancement Benefit My Organization?

Administrators, managers/instructors, and users all have instant access to the new hire's offer letter and resume without going back to the candidate requisition.

Considerations

- Only offer letters and resumes uploaded through the requisition are automatically uploaded to the Snapshot page.
- Before designating folders for the offer letter and resume, ensure that the appropriate folders are available on the user's Snapshot page.
- Ensure that users have the appropriate permission to view the selected folders.
- Flattened applications and Career Center/Universal Profile resumes will not be automatically uploaded.
- If a user or HR admin:
 - Deletes the snapshot folder and its contents from user's snapshot page, the actual file is not deleted from Applicant Profile page.
 - Deletes documents from inside the Snapshot folder in UI for a particular requisition, the documents are not retrievable.
 - Removes or deselects Snapshot folders from [RECRUIT > GENERAL PREFERENCES > STORAGE DESTINATION](#), the folders are no longer visible in the Storage Destination section, but the folders remain on the user's Snapshot page.

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: Delete Document	Grants ability to access, manage, delete, and replace documents on the Applicant Profile > Documents tab or Attachments tab. This permission cannot be constrained by OU. This is an administrator permission	Recruiting