Cornerstone November 2023 What's New

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What's New for November 2023

What's New for November '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 November '23** on page 17 *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 November '23** on page 21 *for additional information.*
- **Release Notes Updates** - This topic provides a complete list of all changes that have been made to the release notes. *See* **Updates to What's New for November '23** on page 22 *for additional information.*
- **Past Releases** - This topic contains links to past release overviews. *See Past Release Notes.*

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

The following new features and enhancements are available for the release:

Content Anytime Features

FEATURE NAME	DESCRIPTION
Content Anytime - Q4	Refreshes to Content Anytime and À La Carte subscriptions occur every month! New titles are added to libraries monthly, and removals occur quarterly. Content Anytime subscribers automatically receive their subscription refreshes. Target dates for Q4 refreshes are listed below. Please refer to the **2023 Content Refresh Calendar** for the timing of refreshes for all of 2023. • October 13 - October 20 Additions Only • December 8 - December 15 Removals & Additions

Content Studio

FEATURE NAME	DESCRIPTION
Content Studio	Content Studio August ‘23 Release Highlights: • **Content Studio Discovery Only Experience for all CSX customers:** the Discovery experience allows non-content customers to become familiar with the Cornerstone content offerings, such as Content Anytime and Partner subscriptions, before subscribing. Administrators can dive into each subscription, view rich metadata, launch the course, and use contextual search to find content that best fits their needs

FEATURE NAME	DESCRIPTION
	• **Content Partner Subscriptions Experience:** new Content Partner tab, that allows customers to access, discover, and purchase content from all Content Partner subscriptions

Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Accessibility Enhancements - November 2023	Yes	With this enhancement, Cornerstone CSX is making accessibility fixes within an application to enhance user inclusivity, ensuring a wider audience can seamlessly interact with and benefit from the platform.
ADP Workforce Now Integrations - Display ADP Correlation ID	Yes	With this enhancement, the ADP Correlation ID is displayed in the OU sync email notification and user sync log for the following integrations: • Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace U.S.) • Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace Canada) • Cornerstone Learning Connector for ADP Workforce Now Next Generation This functionality will be released in a post-release patch.
Capability Category Improvements	Yes	With this enhancement, administrators have a faster, more effortless experience managing Capabilities with AI category detection, improved search, and **additional import functionality**. End users have a more apparent context of how skills are organized by seeing the tagged categories.
Cornerstone CSX App – Goals Enhancements	Yes	With this release, a new My Goals module is now part of the Cornerstone CSX mobile app. My Goals allows managers to create, edit, and update goals, tasks, and targets.
Cornerstone CSX App – Offline Support for Course Videos	Yes	With this release, learners can now download course videos while online, then access and consume content at their convenience while offline. When learners come back online, the information is automatically synced.

FEATURE NAME	AUTOMATIC ALLY ENABLED?	DESCRIPTION
Critical Skills Experience Improvement s	Yes	With this release, the Critical Skills section, located in the user Skills Profile, is enhanced with additional functionality to make it easier to capture ratings, make skills visible to a broader audience, and explain the goal of Critical Skills to the user.
Custom Login Page Enhancemen ts	Yes	The Custom Login Page functionality is optimized and refined to provide an even more visually pleasing experience and improve performance when using the Custom Login Page tool and accessing login pages built using the tool.
Default Email Address Settings - Changes to Deletion Behavior	Yes	Due to an identified performance issue related to one of the July ’23 Release enhancements, the behavior of the Delete action is changed to avoid negative impacts to customers while we work on the performance optimization. With this change, administrators can now delete a default email address in the Corporate Preference page when the default email address is used in emails and templates. This does not impact the configuration of existing emails and templates that are using the deleted default email address.
Default Email Address Settings - Modification History	Yes	With this release, Default Email Address Settings now provide the ability to track changes via Modification history for auditing purposes or to aid in troubleshooting.
Edge Import - Edge Import Framework - Support Customer PGP Key	Yes	By supporting a public key that customers specify when they import a file to the Edge Import feed, customers can use their corresponding private key to decrypt the PGP encrypted load report. The load report can only be decrypted by the customer’s private key associated with that public key. Once decrypted, the user can then see records with errors so they can readily resolve them.
Edge Import - Group Membership Load - Remove Inactive Users from Static Groups	Yes	When loading a Group Membership file via Edge Import, the Remove action can now remove "User is" criteria from the Group Criteria of a static group when the referenced user is inactive. Before this enhancement, attempting to remove those criteria would have generated an error.
Edge Import - ILT Transcript Load - Enhanced	Yes	With this enhancement, administrators can better manage ILT due dates in bulk, which reduces customer work orders.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Ability to Update Due Date		
Edge Import - Include Capability Categories in Capabilities Library Load	Yes	Administrators can now specify up to three category IDs to tag skills when using the Capability Load in Edge Import. A pipe character ("|") must separate multiple categories. Categories must already exist in the system before associating them with a skill. The categories provided in the data load will overwrite any categories already associated with the skill in the system.
Edge Import - New Learning Load Type (Event Transcript Update)	Yes	With this enhancement, a new Event Transcript Update load is available. This load enables administrators to update or delete due dates from ILT Events transcripts and associated curricula, reducing the need for work orders.
Edge Import - New Learning Load Type (LO Catalog Update)	Yes	With this enhancement, a new LO Catalog Update load is available. This load enables administrators to update the creator of training in the Course Catalog. The Modification History will reflect when the Created By value is modified via Edge Import.
Edge Import - New Performance Load Types (Competency Loads)	Yes	With this release, a new Competency Bank load is available in Edge Import. This load type enables administrators to load Competency general information or associate Behaviors or Items to Competencies.
Edge Import - Online Course Assets Load Feed	Yes	With this enhancement, organizations can load new online course assets in the portal via a recurring feed in Edge Import.
Edge Import - Requisition Template Load Enhancement	Yes	With this enhancement, when using Requisition Template ID as the primary identifier, administrators can update any fields of a requisition template in Edge Import without providing an internal and external description each time even when they are not being updated. The Internal Description and External Description fields are optional when using Requisition Template ID as the primary identifier. This enhancement also applies to translation loads.
Edge Import - Transcript	Yes	This enhancement makes the existing Edge Import transcript load permissions constrainable for an additional level of access control. The

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Loads - Make Permissions Constrainable		constraints apply to manual loads, manual feed runs, and bulk API loads.
Edge Import Online Content (OLCO) Integration Solution	No	A new 1:1 Content Integration solution is now available for content vendors who prefer file-based content integrations over an API-based content integration. This integration solution also allows syncing content from a content provider and Online Content (OLCO) transcripts. The Online Content (OLCO) load, which is new with this integration, supports creating and updating content from approved domains. Both manual and automated scheduled feeds are supported. Once the integration solution is purchased, the new Online Content (OLCO) load is available. This functionality is not available during UAT.
Google OAuth Inbound SSO	No	The Google OAuth Inbound SSO (Single Sign-on) connection is available to customers for a seamless user login experience to their Cornerstone CSX portal. This self-configurable connection is available in the user interface under the Single Sign-On menu in Edge.
Group Preview (Early Adopter)	No	The Group Preview enhancements allow administrators to preview the Group membership based on the edited criteria so mistakes can be detected and fixed before saving the Group. Administrators can also save changes as a draft so edits can be made asynchronously while the current Group is retained.
Modernize Cornerstone CSX App	Yes	With this release, the Cornerstone CSX mobile app has a new simplified design to provide a premium and intuitive experience for users.
Multi Factor Authentication (Open Beta)	No	Cornerstone is excited to introduce support for time-based, one-time passwords (TOTP), the most widely adopted two-step verification method, which is considered a secure multi-factor authentication (MFA) method.
November '23 Language Pack Updates	Yes	New updates to Cornerstone Language Packs and additional languages are available with the November '23 Release. Please visit the **November '23 Language Pack Updates** posting to review the full list of changes and their targeted availability in stage and production environments.
People Matrix Qualification Mode - General Availability	Yes	Qualification Mode extends the ability of the People Matrix to work with Capability Models and enables managers to track training, in addition to skills, from within the People Matrix.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reporting 2.0 - Auto-Disable Daily Schedules for Unused Reports	Yes	With the November '23 Release, the system tracks the last accessed date for each scheduled snapshot of all owners and shared users associated with the report. If a scheduled report snapshot has not been accessed within the last 30 calendar days by any of the associated users, the system will automatically disable the schedule associated with it. This enhancement improves system performance and optimizes resource usage.
Reporting 2.0 - Permissions Enablement Tool UI Update	Yes	With the November '23 Release, all references of the Custom Reports permission model are removed from the welcome page of the Permissions Enablement tool. The Permissions Enablement Tool UI no longer displays options to migrate from Custom Report permissions and constraints, and the tool description is updated.
Reporting 2.0 - Shared Reports Filter Behavior	Yes	With this enhancement, the shared user only has visibility into data that strictly aligns with the filters applied by the report owner. This applies to reports that are created after the release. Existing reports will continue to behave as-is.
Reporting 2.0 - User and Training Flyouts Start with Empty Search	Yes	With this enhancement, when initially opened, the user and training flyouts no longer display full data lists to improve page load times. Instead, the flyouts load without prepopulated results to provide a clean interface that dynamically updates and displays only the selected information. Users are required to input search parameters to initiate the search process. When a user has selected or saved information for the flyout, the selected information is displayed when accessing it again.
Reporting 2.0 New Fields - November 2023	Yes	The following additions and updates have been made to Reporting 2.0 fields with this release: • **Reporting Fields - Learning** • **Reporting Fields - Performance** • **Reporting Fields - Position Management**
RTDW Updates to OData v4.0 Delta Objects	Yes, when using OData	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. A consolidated **list of Data Exporter API objects that currently support OData Delta/Change Tracking** is maintained in the **RTDW Documentation for Reporting API, RDW, and Data Exporter Community**. Join and follow the community to be notified of new objects with Delta support.
RTDW Updates to Reporting	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,

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
API, RDW, Data Exporter and Data Exporter API		deprecated, or break applications, scripts, or functionalities that are based on earlier versions of RTDW objects.
Skills Quick Start Wizard	Yes	The Skills Quick Start Wizard makes it easy for administrators to start with Skills in Cornerstone CSX. With this release, the Skills Quick Start Wizard is improved to provide a better administrator onboarding experience by facilitating step-by-step navigation and focusing on the most critical and often confusing configuration tasks. The Skills Library Builder UI has also received an updated look.
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 on December 1. This will impact only a subset of API customers.
Tracking Your Critical Skills Progress	Yes	This feature offers a robust tracking system for the proficiency of an employee's critical skills over time, which helps employees in their professional journey, facilitates manager evaluation and coaching, and links employees to opportunities within the organization.
UltiPro and Kronos Integrations - Update to UKG Branding	Yes	Cornerstone partners Ultimate Software and Kronos Inc. have merged and are now called Ultimate Kronos Group (UKG). The integration titles are updated in Edge Marketplace, Edge Integrations, Edge Settings, and the sync email notifications to align with UKG's new branding and product names. This functionality will be released in a post-release patch.
Unlinking Skills Graph Skills	Yes	When editing skills that were imported from the Skills Graph taxonomy, administrators now have the option to unlink the Capability from the underlying Skills Graph engine. This helps prevent overlapping Skills Graph IDs between Cornerstone-provided and custom skills.
Webhooks (Early Adopter) Enhancements	Yes, when using Webhooks	In this release, content encoding is implemented to improve throughput for all subscriptions to event-driven notifications through Webhooks, providing more timely execution of the business process. Edge Import LMS Events are added to ensure all Learning Assignment and Completion events are published through the Webhook.

Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
CHR - Extend Compensation Task End Dates	Yes	With this release, if Effective Dating is enabled, administrators can manually extend Task End dates for In-Progress, Completed, and Expired tasks. Administrators can also extend the compensation statement availability date.
Form Enhancements	Yes	With this release, two new Forms enhancements are available: • Character limit increase for Approver Comments • User ID field now available for use with Form Configuration
Position Management (Early Adopter) – Introduction & Functional Overview	N/A	Position Management helps organizations organize their workforce more efficiently by defining Positions as unique roles within the organization, categorizing them by Jobs and job-related functions, and structuring them by Organizational Units (OUs).
Position Management (Early Adopter) – Impact on CSX	N/A	Once Position Management (PM) is activated, its functionality impacts the following areas in CSX: • User Record • Organizational Units • My Account Preferences • Form Management • Batch Edit Users • Self-Registration • Custom Field Administration
Position Management (Early Adopter) – Enable and Implement	N/A	The transition from a user-centric data model to the position-centric data model will be fully supported by CSX engineering teams.
Position Management (Early Adopter) - Security	N/A	Position Management provides a easy-to-undrstand security model as well as new permissions that allow authorized users to manage critical details for Positions, Jobs, Functions, and standard Organizational Units (OUs).
Position Management (Early Adopter) - Reporting	N/A	Reporting in Position Management provides the necessary data and insights to optimize workforce planning, compliance, resource allocation, and decision-making by: • Enabling organizations and administrators to report on Position and Job-related data to export relevant information for your positions and jobs.

FEATURE NAME	AUTOMATIC ALLY ENABLED?	DESCRIPTION
		• Including the assigned Position(s) and Job(s) into User reports. • Supporting the ability for users to differentiate between current, planned, & past Positions and Job assignments. • Providing permissions and constraints capabilities.
Position Management (Early Adopter) - Edge Import	N/A	Once Position Management (PM) is activated, its environment becomes the master data system for Position data, related Standard OU,s and Employee assignments. New data loads will be available via Edge Import to support bulk data maintenance for all relevant PM entities.

Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Ability to Revert ILT Sessions inside Curricula (Early Adopter)	Yes Enabled in Stage. Needs Self Activation in Pilot and Producttion.	Administrators can revert ILT session completions where the ILT is part of one or more curricula.
Admin Compliance Dashboard - Material and Online Course	Yes	The Admin Compliance Dashboard gives a quick overview of the versioning process. It enables administrators to review the number of compliant and non-compliant learners and the number of learners who received the correct training version.
Auto-Completion of Videos - Enhancements (Early Adopter)	Yes Enabled in Stage. Needs Self Activation in Pilot and Production.	Auto-completion allows videos to auto-complete without any user involvement after the user has watched the entire video. The enhancement supports auto-completion for standalone videos and videos within curricula.
Certification Administration Enhancements	Yes	The administrators can inactivate the top-level version and all lesser versions simultaneously instead of manually inactivating multiple versions of a certification one by one.
Course Catalog Search - Keyword	Yes	It is now possible to filter by keyword when Enhanced Search is enabled on the course catalog search page.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Filter with Enhanced Search		The Keyword filter uses “partial match” and “starts with” when returning search results. The filter can be enabled and disabled in the Search Preferences.
Create Tool Enhancements	Yes Available only in Production. Not available in Stage.	New Create Tool enhancements to add collaborators and auto transcript videos.
Curriculum Subscription Enhancements	Yes Enabled in organizations using recurring curriculum subscriptions on their portals.	The learners can auto-renew curriculum subscriptions without manual intervention, even if the payment account criteria are configured.
Curriculum Versioning Enhancement	Yes	The administrators cannot save the structural edits made in an unassigned Curriculum version and create a new version.
Deep Links Enhancements	Yes	The administrator is prompted with a confirmation message before deleting Base URLs to prevent accidental deletion. The enhancement also enables the activation or deactivation of system or user-defined Page URLs instead of deleting them.
Deprecation of Course Builder, Module Builder, and Asset Importer with the November ‘23 Release	N/A	Course Builder, Module Builder, and Asset Importer is being deprecated with the November '23 Release.
Deprecation of (Legacy) Course Publisher with the July '24 Release	N/A	Course Publisher deprecation announcement with the November '23 Release.
Deprecation of Learning on Workplace by Facebook Integration	N/A	The Learning on Workplace by Facebook integration is being deprecated in the November ‘23 release.
General Due Date Enhancements	Yes	This enhancement provides consistent due date calculations across different use cases so that the learners do not miss the due date for the training and remain compliant.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Hide Legacy Skills Tab on Edit Training Page UI with the November '23 Release	N/A	The legacy Skills tab will be default hidden from the Edit Training page UI in the Course Catalog with this November 2023 release.
Learning Assignment Tool – Relative Recurrence Enhancement (General Availability)	Yes	If dynamically recurring Learning Assignments have the recurrence date set as “Relative” or “Annually,” the Learning Assignment Tool (LAT) assigns the training to users who have surpassed the recurrence date criteria of dynamic assignments but still satisfy the training assignment criteria.
Learning Assignment Tool - Search Training Modal - Enhanced Search	Yes. May need 10 business days to be present after their respective release dates in Stage and Production.	The Search Training Modal within the Create Assignment Workflow allows administrators to use the Enhanced Search as a default setting.
Learning Search - Filter Configuration - General Availability	N/A	The administrators can enable or disable filters for the Learning Search page not used within a portal or a division.
Metadata Preservation for Content Subscriptions and Integrations	Yes	Content is now updated with the latest course metadata from Content Providers, including the 'Title', 'Description', and 'Keywords' fields. To preserve manual edits to these fields, contact Global Customer Support.
SF-182 Enhancements for Approvals and Completions	Yes	When editing an approved SF-182 form, the approvers can allow a learner to edit the approved form. The learners allowed to edit can re-submit the form while maintaining the existing approvals.
Stop Auto-Populating Search Results in Administrative Search (Early Adopter)	Yes Enabled in Stage. Activation is required in Production.	The administrators can control the initial load of results on a page, reducing the time a page takes to load with all the results.
Stripe Payment Gateway - Tax	Yes	Customers using the Stripe payment gateway can automatically collect tax from their end users during the transaction.
Transcript API (Early Adopter)	Yes	The Transcript API is a bundle of APIs providing access to the learner's transcript. The APIs follow the same

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		business logic, security, rules, and events from the portal's configuration.
Upgrade Excel Format of Exports in ILT	Yes	Excel download options available in ILT have been upgraded with the XLSX extension to make downloads easier and safer to use for administrators and instructors.
User Interface Modifications for Learning Administration Pages (Early Adopter)	Yes Enabled in Stage. Needs activation in Production.	User Interface modifications in Learning Administration pages.
Versioning Dashboard Page - Enhancements	Yes	The administrators get more options to utilize the Versioning Dashboard Page effectively due to new functionalities.

Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Check-Ins Microsoft Teams Integration	Yes	With this release, Check-Ins is integrated with MS Teams. Now, users can receive Check-In meetings and Follow-Ups notifications on the MS Teams chat page and click a link to take action, even if not actively logged into Check-Ins.
Check-Ins Outlook Calendar Invite	Yes	With this enhancement, a user's Outlook calendar is integrated with Check-Ins meetings. Users can create a Check-Ins meeting(s) and send an invite to the Outlook calendar of both participants.
Check-Ins Slack Integration	Yes	With this release, Check-Ins is integrated with Slack. Now, users can receive Check-In meetings and Follow-Ups notifications on Slack and click a link to take action, even if not actively logged into Check-Ins.
Check-Ins Usability Enhancements	Yes	With this enhancement, the hyperlink functionality is simplified and redundant buttons removed to improve the Check-Ins user experience.
Check-Ins View Permission	Yes	With this enhancement, a new option, **Check-Ins View Permission**allows users to share Check-Ins with other colleagues. Managers and coaches now have more visibility to provide feedback and meeting participants can share their Check-Ins series with managers or coaches to ensure visibility.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Delegation of Goal Permissions	Yes	With this enhancement, managers can assign the following goal permissions to select subordinates when they are away from the office for an extended period of time: • View Goals • Employee Goals - Create
Enforce Goal Policies	Yes	With this enhancement, administrators can configure, and the system enforces, a minimum and maximum number of required goals for a Division, and a total weight limit for goals.
Goal Co-Planners	Yes	With this enhancement, administrators can grant goal creation and approval permissions to someone other than the manager. These additional co-planners can create, view, and approve goals by being granted the following permissions: • Employee Goals - Approve • Employee Goals - Create • MyTeam Goals
Review Task Central - Bulk Sign Off	Yes, once Review Task Central is enabled.	With this enhancement, in Review Task Central, signers can select several review tasks and sign off on them at the same time, in the same location. This bulk sign off saves time and effort.
Review Task Central Bulk Submit – Display Ratings as Text	Yes, once Review Task Central is enabled.	With this enhancement, the Overall Step Rating column displays the rating scale as Numeric, Text, or Both based on the scale setting set in Task Administration.
Review Task Central – PDF Redesign	Yes, once Review Task Central is enabled.	With this release, in Review Task Central, the improved Performance Review .pdf document will provide a more user-friendly, intuitive, and reliable user interface to for administrators, managers, and end-users.
View a Goal's Dynamic Assignment Criteria	Yes	With this enhancement, administrators can view the dynamic assignment while viewing the details of the Dynamic Assignment Template.

Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Candidate Skills Match (Early Adopter)	No	With this release, on the Manage Candidates page, a new "Candidate Matching Score" field is provided. The candidate skills match score is calculated by matching a candidate's profile against the requisition's job description.
Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '24 Release	N/A	The ability to perform Requisition Template data loads using DLW will be deprecated with the November ’24 Release. Support for DLW Requisition Template loads will also stop. Customers are encouraged to begin using Edge Import for their Requisition Template loads prior to the deprecation.
Manage Applicants Deprecation with the March '24 Release	N/A	With the Manage Applicants deprecation, Manage Candidates becomes the single source to assess and manage all candidates.
Offer Letter Enhancements	Yes	With this release, for the modular offer letter functionality, the following enhancements are provided to improve and simplify this process: • New sub-status and action buttons on the Manage Candidates page • Sub-status details visible in multiple locations • No default Start Date for offer letters • New editor for offer letter templates
Paradox Interview Scheduling Integration	No	With this release, Cornerstone integrates with Paradox to allow recruiters and candidates to schedule interviews using the calendar and virtual meeting tools of their choice.
PitchYou Integration	No	With this release, Cornerstone integrates with PitchYou to allow candidates a seamless job application experience using WhatsApp.
Pre-screening Questions as Filters on Manage Candidates	Yes	With this enhancement, on the Manage Candidates page, recruiters can create pre-screening questions and filter candidates based on the answers to these questions.
Send Email from Manage Candidates and Templates Enhancements	Yes	With this release, the overall Manage Candidates email and templates customer experience is enhanced as follows:

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		• For candidate email templates, administrators can now configure cc: addresses and add attachments to the template. • When sending email to candidates, recruiters can now configure cc: addresses or select them from Candidate Email Template. Additionally, Recruiters can now receive attachments from candidates.
Structured Resume Details API	No	With this release, the new Structured Resume Details API endpoint queries on the application ID and provides structured resume data as a response. Customers can use this endpoint to fetch the parsed resume data and process it per their requirements.
TimeKO Integration	No	With this release, Cornerstone integrates with TimeKO to provide customers an efficient ad hoc messaging and communication solution.

New and Enhanced Permissions for November '23

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

New Permissions

The following permissions are new for this release:

Core/General

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Event Transcripts Update Load	Grants access to the Event Transcript Update data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - LO Catalog Update Load	Grants access to the LO Catalog Update data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Import - Competency Bank Load	This permission enables administrators to load competency data via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Import Learning - Modify Training Creator	Grants the ability to modify the "created by" value for training in the LO Catalog Update data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Group Preferences - Manage	Grants the ability to access and modify the Group Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration
MFA - Admin - User Device - Manage	Grants the ability to manage the user device information for Multi-factor Authentication. This permission works in conjunction with the MFA - Admin - User Device - View permission. Administrators can delete devices for user records within their constraints. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
MFA - Admin - User Device - View	Grants the ability to view the user device information for Multi-factor Authentication. Administrators can view the page for user records within their Users - View permission constraints, and additional constraints can be added to this permission. This permission can be constrained by OU,	Core Administration

	User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	
MFA - Administration - Manage	Grants the ability to view and configure Multi-factor Authentication (MFA). This permission cannot be constrained. This is an administrator permission.	Core Administration
MFA - Administration - View	Grants the ability to view the Multi-factor Authentication (MFA) configuration. This permission cannot be constrained. This is an administrator permission.	Core Administration
Skills Profile - Critical Skills - View	Grants the ability to view the Critical Skills table for any user. This permission cannot be constrained. This is an administrator permission. Administrators must also have permission to access the user's Skills Profile.	Core Administration

Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Tool Admin	Grants the administrators access to Create Tool. Administrators must also have the Create Tool permission. Administrators can manage content created by anyone in the organization. This permission cannot be constrained.	Learning
Roster - Revert Sessions Inside Curricula	Grants the ability to revert instructor led training session rosters that are completed. This permission works in conjunction with Roster - Manage and Roster - View permissions and supports reverting sessions that are part of one or more curricula. This is an administrator permission.	Learning - Administration
Versioning Dashboard Page - View	Grants ability to view the Versioning Dashboard Page. This permission cannot be constrained. This permission works in conjunction with the Course Catalog - View and Admin Compliance Dashboard - View permissions. This is an administrator permission.	Learning

Performance

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Settings - Manage	Grants ability for the user to update global settings relating to Check-Ins. The permission constraints determine whom can modify the global Check-In settings. This permission can be constrained by OU, User's OU, User Self and Subordinates,	Performance

	User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. This is an administrator permission.	

Recruiting

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

Enhanced Permissions

The following existing permissions are enhanced for this release:

Core/General

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 can be constrained by OU. This is an administrator permission.	Edge Import
Access LMS - Curriculum Transcripts Load	Grants access to the Curriculum Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - External Training Load	Grants access to the External Training data load via Edge Import. This permission can be constrained by OU. 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 can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - Material Transcripts Load	Grants access to the Material Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Load	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import

Access LMS - Online Content (OLCO) Feed	Grants access to the Online Content (OLCO) data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Online Content (OLCO) Load	Grants access to the Online Content (OLCO) data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Online Transcripts Load	Grants access to the Online Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - Test Transcripts Load	Grants access to the Test Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - Video Transcripts Load	Grants access to the Video Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import

New Report Fields for November '23

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

Learning

FIELD NAME	SECTION
Certification Title	Certification Approval History
Comment	Certification Approval History
Decision	Certification Approval History
Decision Date	Certification Approval History
Owner	Certification Approval History
Requester	Certification Approval History
Request Date	Certification Approval History
Request Type	Certification Approval History
Interest Comments	ILT Interest Tracking
Interest Date Submitted	ILT Interest Tracking
Interest Location	ILT Interest Tracking
Interest Location ID	ILT Interest Tracking
Interest Location Parent	ILT Interest Tracking
Interest Location Parent ID	ILT Interest Tracking

Performance

FIELD NAME	SECTION
Assignment - OU criteria	Goals
Assignment - OU type	Goals
Assignment - User criteria	Goals
Assignment - User’s OU	Goals

Updates to What's New for November '23

The following changes have been made to the What's New documentation since it was initially published:

Changes made on 15 December 2023:

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Paradox: Interview Scheduling Integration	Paradox: Interview Scheduling Integration	Added a link to the Starter Guide.

Changes made on 8 December 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Critical Skills Experience Improvements	Critical Skills - Skills and Targets	If a critical skill has a target, but targets are disabled, the Expected and Status columns still display.

Changes made on 1 December 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting 2.0 - Auto-Disable Daily Schedules for Unused Reports	Reporting 2.0 - Auto-Disable Daily Schedules for Unused Reports	If a scheduled report snapshot has not been accessed for 30 calendar days by any of the associated users, the system will automatically disable the schedule associated with it. The count for 30 days begins after the November '23 Release.

Changes made on 22 November 2023:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Curriculum Versioning Enhancement	Curriculum Versioning Enhancement	Added a use case and rephrased the introduction for clarity.
Versioning Dashboard Enhancements	Versioning Dashboard Enhancements	Additional information under the "Refresh Link" section.
General Due Date Enhancements Use Cases	General Due Date Enhancements Use Cases	"Append version with annual due date LAT" changed to "Append version with no LAT".

Changes made on 17 November 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - New Learning Load Type (Event Transcript Update)	Edge Import - New Learning Load Type (Event Transcript Update)	Added use cases.
November '23 Language Pack Updates	November '23 Language Pack Updates	Additional languages and updates.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ability to Revert ILT Sessions Inside Curricula (Early Adopter)	Ability to Revert ILT Sessions Inside Curricula (Early Adopter)	Removed the list of existing permissions.
Metadata Preservation for Content Subscriptions and Integrations	Metadata Preservation for Content Subscriptions and Integrations	The LinkedIn Learning integration is not affected by this change. This integration uses an older delivery system, not CDS.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Delegation of Goal Permissions	Delegation of Goal Permissions	Added additional navigation instructions and images.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Offer Letter Enhancements	Offer Letter Enhancements	Clarified that start date no longer defaults to today's date *when creating the first version of an offer letter*.
Pre-screening Questions as Filters on Manage	Pre-screening Questions as Filters on Manage	Added Considerations and removed the following: **Note:** Free-format text (Essay), Free form (short text), and Title and instructions are not supported as pre-screening filters.

Changes made on 10 November 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Default Email Address Settings - Changes to Deletion Behavior	Default Email Address Settings - Changes to Deletion Behavior	This is a new topic.
Default Email Address Settings - Modification History	Default Email Address Settings - Modification History	Removed the Overwrite Logic and Delete Icon changes.
Edge Import - Group Membership Load - Remove Inactive Users from Static Groups	Edge Import - Group Membership Load - Remove Inactive Users from Static Groups	Updated the description to clarify the behavior.
Reporting 2.0 - User and Training Flyouts Start with Empty Search	Reporting 2.0 - User and Training Flyouts Start with Empty Search	Clarified that this enhancement only updates the User and Training flyouts.
Security Permission Constraint Enhancements	Security Permission Constraint Enhancements	This enhancement is removed from the November 2023 release.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Check-Ins Slack Integration	Check-Ins Slack Integration	Removed image.
Review Task Central – PDF Redesign	Review Task Central – PDF Redesign	Added This functionality was available in stage portals on 10/26.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Offer Letter Enhancements	Offer Letter Enhancements	Added Offer: Manage Offers permission.
PitchYou integration	PitchYou integration	Added This integration will be available in a post-release patch.
TimeKO Integration		Added This integration will be available in a post-release patch.

Changes made on 3 November 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Capability Category Improvements	Capability Category Improvements	Corrected the permission name to Access Capabilities - Library Load.
Edge Import - Include Capability Categories in Capabilities Library Load	Edge Import - Include Capability Categories in Capabilities Library Load	Corrected the permission name to Access Capabilities - Library Load.
Edge Import - ILT Transcript Load - Enhanced Ability to Update Due Date	Edge Import - ILT Transcript Load - Enhanced Ability to Update Due Date	For load configurations created after the November 2023 release, the Comments field is required to be mapped when the Due Date field is mapped. Existing load configurations created before the November 2023 release that have the Due Date field mapped and do not have the Comments field mapped will continue to work.
Group Preview (Early Adopter)	Group Preferences	Noted that activating Group Preview and Save Draft does not impact your Group refresh schedule.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ability to Revert ILT Sessions Inside Curricula (Early Adopter)	Ability to Revert ILT Sessions Inside Curricula (Early Adopter) Supported and Unsupported Revert Scenarios	An inactive curriculum can be reverted. If the session is part of three curricula, one inactive and two active, all three curricula will be reprocessed. Please also note that if an inactive curriculum is on the Archived tab due to transcript preference rules or being manually moved, the inactive curriculum will remain on the Archived tab even if the ILT session is reverted. Updated support and unsupported curriculum revert scenarios in *Supported and Unsupported Revert Scenarios* topic.
Curriculum Subscription Enhancements	Curriculum Subscription Enhancements	Updated the release note for clarity.
Curriculum Versioning Enhancement	Curriculum Versioning Enhancement	Updated the introduction for more clarity.
SF-182 Enhancements for Approvals and Completions	SF-182 Enhancements for Approvals and Completions	Added an existing permission under list of Permissions. Permission name is SF-182 Requests - Complete.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Enforce Goal Policies	Enforce Goal Policies	Updated first bullet in Considerations to: Neither Reviewees nor Reviewers of a Review task will be able to breach the configured weight and maximum goal limit via a Review task.

Changes made on 27 October 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - New Learning Load Type (Event Transcript Update)	Edge Import - New Learning Load Type (Event Transcript Update)	Changed the name of the topic and the load name to "Event Transcript Update."
Skills Quick Start Wizard	Skills Quick Start Wizard	The Skills Library Builder UI has also received an updated look.

Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Extend Compensation Task End Dates - Cornerstone HR	Extend Compensation Task End Dates - Cornerstone HR	Added the following: **Note:** With the release of this enhancement, extending compensation task end dates applies to both newly created compensation tasks and to tasks created before the release.

Changes made on 20 October 2023:

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Check-Ins Calendar Invites	Check-Ins Calendar Invites	Updated the Enable the Outlook Calendar Invite section with specific instructions
• Review Task Central - Bulk Sign Off • Review Task Central Bulk Submit – Display Ratings as Text	• Review Task Central - Bulk Sign Off • Review Task Central Bulk Submit – Display Ratings as Text	Added link to Review Task Central Starter Guide

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
• Review Task Central – PDF Redesign	• Review Task Central – PDF Redesign	

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Applicants Deprecation with the March '24 Release	Manage Applicants Deprecation with the March '24 Release	Added Manage Applicants Deprecation Guide
• Send Email from Manage Candidates and Templates Enhancements • Offer Letter Enhancements • Pre-screening Questions as Filters on Manage Candidates	• Send Email from Manage Candidates and Templates Enhancements • Offer Letter Enhancements • Pre-screening Questions as Filters on Manage Candidates	Added Manage Candidates Starter Guide

Changes made on 19 October 2023:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Cornerstone CSX App – Goals Enhancements	Cornerstone CSX App – Goals Enhancements	Added topic.
Cornerstone CSX App – Offline Support for Course Videos	Cornerstone CSX App – Offline Support for Course Videos	Added topic.
Modernize Cornerstone CSX App	Modernize Cornerstone CSX App	Added topic.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Extend Compensation Task End Dates - Cornerstone HR	Extend Compensation Task End Dates - Cornerstone HR	The ability to extend compensation task end dates is available for existing compensation tasks and compensation tasks created after the release.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
• Review Task Central - Bulk Sign Off	• Review Task Central - Bulk Sign Off	Added link to Review Task Central Starter Guide

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
• Review Task Central Bulk Submit – Display Ratings as Text • Review Task Central – PDF Redesign	• Review Task Central Bulk Submit – Display Ratings as Text • Review Task Central – PDF Redesign	

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Applicants Deprecation with the March '24 Release	Manage Applicants Deprecation with the March '24 Release	Added Manage Applicants Deprecation Guide
• Send Email from Manage Candidates and Templates Enhancements • Offer Letter Enhancements • Pre-screening Questions as Filters on Manage Candidates	• Send Email from Manage Candidates and Templates Enhancements • Offer Letter Enhancements • Pre-screening Questions as Filters on Manage Candidates	Added Manage Candidates Starter Guide

01 December Patch Release Functionality

What's New for the 01 December 2023 Patch Release

The following is released along with the 01 December 2023 patch release:

MODULE	FEATURE	DESCRIPTION
Core/General	ADP Workforce Now Integrations - Display ADP Correlation ID	With this enhancement, the ADP Correlation ID is displayed in the OU sync email notification and user sync log for the following integrations: • Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace U.S.) • Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace Canada) • Cornerstone Learning Connector for ADP Workforce Now Next Generation
Core/General	Soap API Deprecation in 2023 Q4	All Cornerstone SOAP APIs, except Transcript APIs (/webservices/LMS/LOWS.asmx), will be deprecated in Q4 of 2023 on December 1. This will impact only a subset of API customers.
Core/General	UltiPro and Kronos Integrations - Update to UKG Branding	Cornerstone partners Ultimate Software and Kronos Inc. have merged and are now called Ultimate Kronos Group (UKG). The integration titles are updated in Edge Marketplace, Edge Integrations, Edge Settings, and the sync email notifications to align with UKG's new branding and product names.
Recruiting	PitchYou Integration - Apply to Jobs via WhatsApp	With this release, Cornerstone integrates with PitchYou to allow candidates a seamless job application experience using WhatsApp.
Recruiting	TimeKO Integration - Send Ad Hoc SMS to Candidates	With this release, Cornerstone integrates with TimeKO to provide customers an efficient ad hoc messaging and communication solution.

Core/General

ADP Workforce Now Integrations - Display ADP Correlation ID

With this enhancement, the ADP Correlation ID is displayed in the OU sync email notification and user sync log for the following integrations:

- Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace U.S.)
- Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace Canada)
- Cornerstone Learning Connector for ADP Workforce Now Next Generation

This enhancement streamlines the support process between ADP and Cornerstone by exposing ADP's Correlation ID so customers can provide this unique ID to ADP when submitting support tickets.

This functionality is available with the December 1 patch.

Implementation

This functionality is automatically implemented for all organizations.

This functionality is available with the December 1 patch.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate, where the administrator can browse integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate, where the administrator can configure, enable, and disable their third-party integrations used within 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 on December 1. This will impact only a subset of API customers.

UltiPro and Kronos Integrations - Update to UKG Branding

Cornerstone partners Ultimate Software and Kronos Inc. have merged and are now called Ultimate Kronos Group (UKG). The integration titles are updated in Edge Marketplace, Edge Integrations, Edge Settings, and the sync email notifications to align with UKG's new branding and product names.

PREVIOUS INTEGRATION TILE	POST-RELEASE INTEGRATION TILE
Ultimate Software’s UltiPro Core Data Inbound Integration	UKG Pro™ User & OU Data Inbound Integration
Ultimate Software’s UltiPro Single Sign-on (SSO) to Cornerstone	UKG Pro™ Single Sign-on to Cornerstone
Ultimate Software’s UltiPro Transcript Outbound Integration	UKG Pro™ Transcript Data Outbound Integration
Kronos Workforce Dimensions Employee Dashboard Tile	UKG Pro Workforce Management™ Employee Dashboard Tile
Kronos Workforce Ready Core Data Inbound Integration	UKG Ready™ User & OU Data Inbound Integration
Kronos Workforce Ready Time & Attendance	UKG Ready™ Time & Attendance Integration

This functionality is available with the December 1 patch.

Implementation

This functionality is automatically implemented for all organizations.

This functionality is available with the December 1 patch.

Permissions

The following existing permissions apply to this functionality:

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

Recruiting

PitchYou Integration

This functionality is available with the December 1 patch.

WhatsApp is the most popular chat app in the world. Candidates need a seamless job application process in chat format that is easily accessible through mobile phones.

With this release, Cornerstone integrates with PitchYou to allow candidates a seamless job application experience using WhatsApp.

Considerations

Customers must have a PitchYou subscription.

Implementation

- To enable and configure this integration, go to the Edge Marketplace and locate the PitchYou tile. *See Marketplace - Browse Edge Integrations.*
- Customer can reach out support@pitchyou.de for additional support.

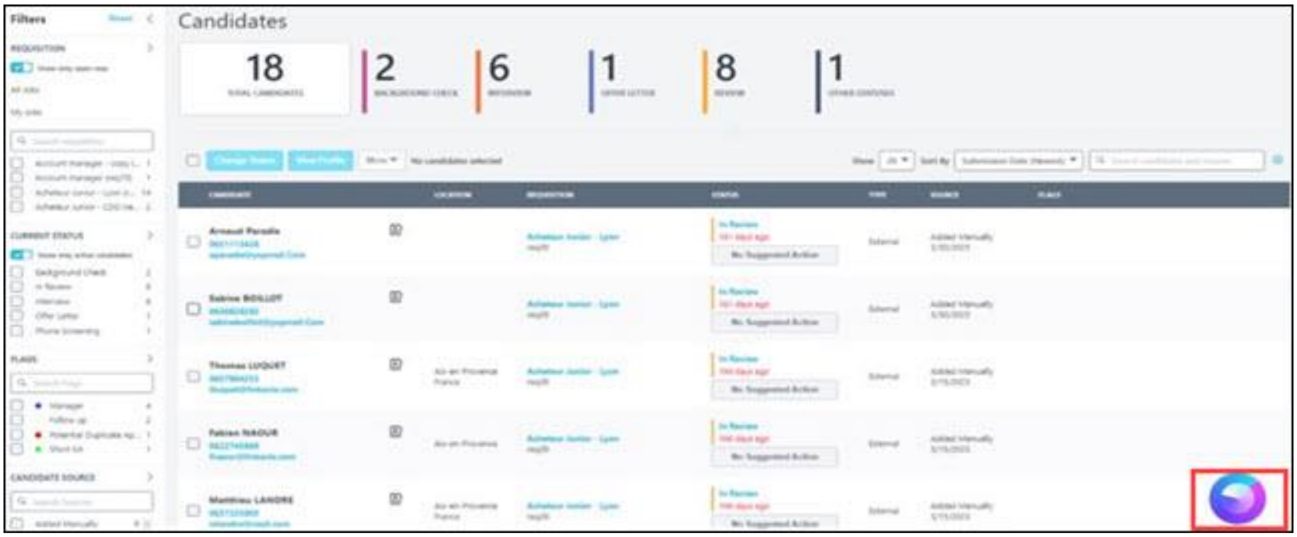
TimeKO Integration - Send Ad Hoc SMS to Candidates

This functionality is available with the December 1 patch.

TimeKO by LINKAVIE, provides best-in-class solutions to facilitate communication with candidates and employees by sending mass text messages and getting real-time categorized positive or negative answer.

With this release, Cornerstone integrates with TimeKO to provide customers an efficient ad hoc messaging and communication solution.

Once enabled, the TimeKo icon appears on the Manage Candidates page. Clicking the icon opens the extension.



Key Features

- Multi-channel communication solution for candidates and employees.
- Bulk SMS dispatch with automatic categorization of responses.
- Schedule messages to send reminders to candidates or employees.

Considerations

- Customers must use Chrome or Firefox to access ATS.
- Customers must be a TimeKO customer to use this integration.

Implementation

Contact TimeKO at contact@linkavie.com to get quotes and guidelines to integrate this solution.

15 December Patch Release Functionality

What's New for the 15 December 2023 Patch Release

The following is released along with the 15 December 2023 patch release:

MODULE	FEATURE	DESCRIPTION
Recruiting	Paradox: Interview Scheduling Integration	With this release, Cornerstone integrates with Paradox to allow recruiters and candidates to schedule interviews using the calendar and virtual meeting tools of their choice.with TimeKO to provide customers an efficient ad hoc messaging and communication solution.

Recruiting

Paradox: Interview Scheduling Integration

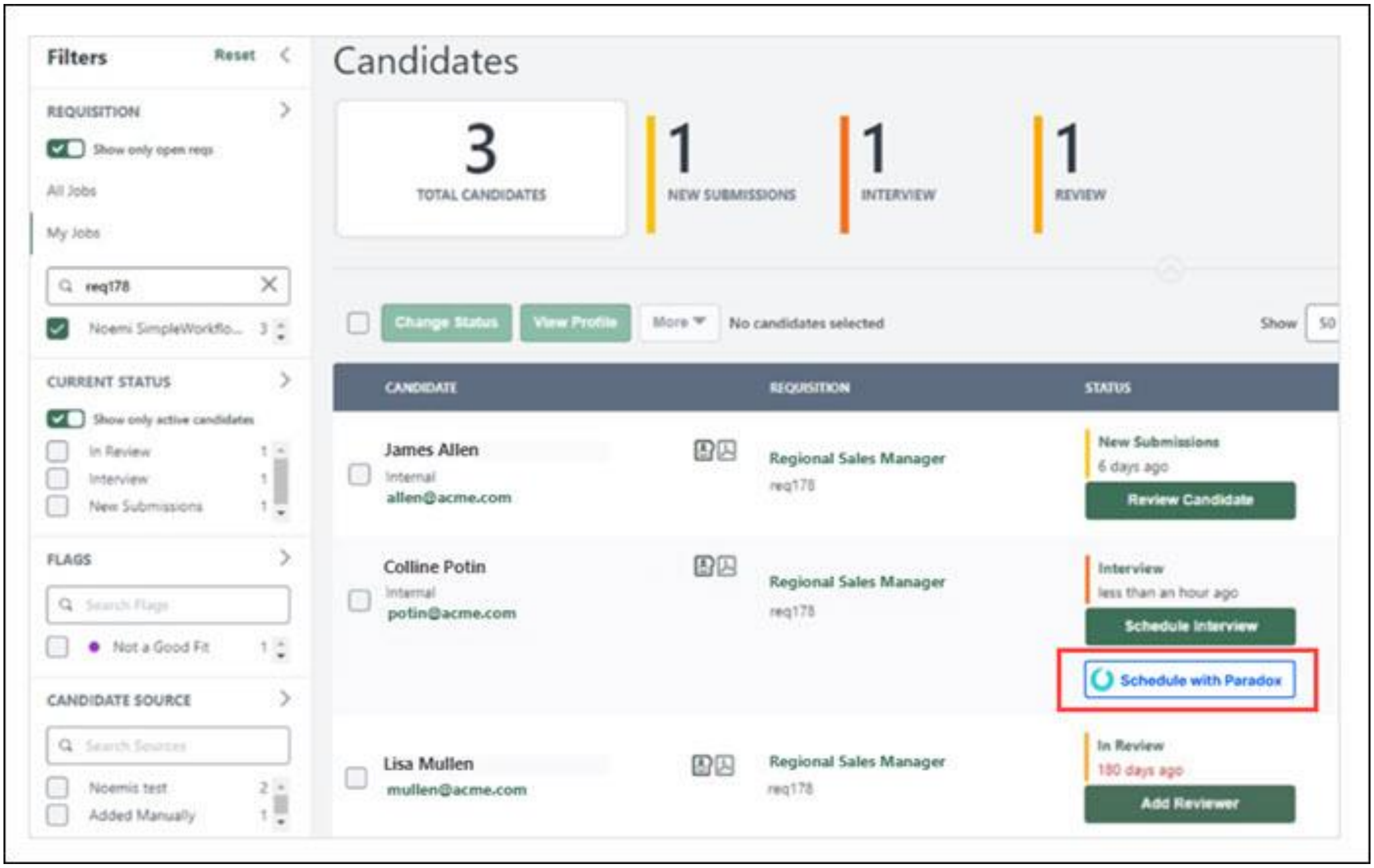
Paradox Conversational Scheduling automates every type of interview in minutes - from a simple phone screen to a multi-person, multi-location interview day - saving recruiters and hiring managers countless hours, every day.

With this release, Cornerstone integrates with Paradox to allow recruiters and candidates to schedule interviews using the calendar and virtual meeting tools of their choice.

Key Features

- Seamless integration from Cornerstone Recruiting pages towards the Paradox browser extension.
- Interview schedule returned to Cornerstone enables the recruiting feedback process.
- Benefits from Paradox
    - Recruiter defined schedule or candidate selects a time.
    - Calendar integrations/Virtual meeting integrations.
    - Multi-modal communication with candidates.
    - Schedule, reschedule, and cancel interviews.
    - Communicate with candidates through Emails + SMS or WhatsApp (defined at portal level).

Once enabled, the Paradox option appears on the Manage Candidates page:



Considerations

- Customers must have CSOD Recruiting licenses and Paradox scheduling licenses.

- Customers must be Paradox customers to use the integration.

Implementation

To enable this integration, contact Global Customer Support (GCS).

Content Anytime

Content Anytime - Q4

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

Target dates for Q4 refreshes are listed below. Please refer to the **2023 Content Refresh Calendar** for the timing of refreshes for all of 2023.

- October 13 - October 20 Additions Only
- December 8 - December 15 Removals & Additions

Visit and follow the **Content Refresh topic** in the Success Center to stay up to date with the latest subscription refresh information for both Content Anytime Subscriptions and À La Carte Libraries.

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

Content Studio

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

Visit the **Content Studio playlist** to get to know Content Studio and discover how it helps in curating highly effective and engaging content.

Content Studio August ‘23 Release Highlights:

- **Content Studio Discovery Only Experience for all CSX customers:** the Discovery experience allows non-content customers to become familiar with the Cornerstone content offerings, such as Content Anytime and Partner subscriptions, before subscribing. Administrators can dive into each subscription, view rich metadata, launch the course, and use contextual search to find content that best fits their needs
- **Content Partner Subscriptions Experience:** new Content Partner tab, that allows customers to access, discover, and purchase content from all Content Partner subscriptions

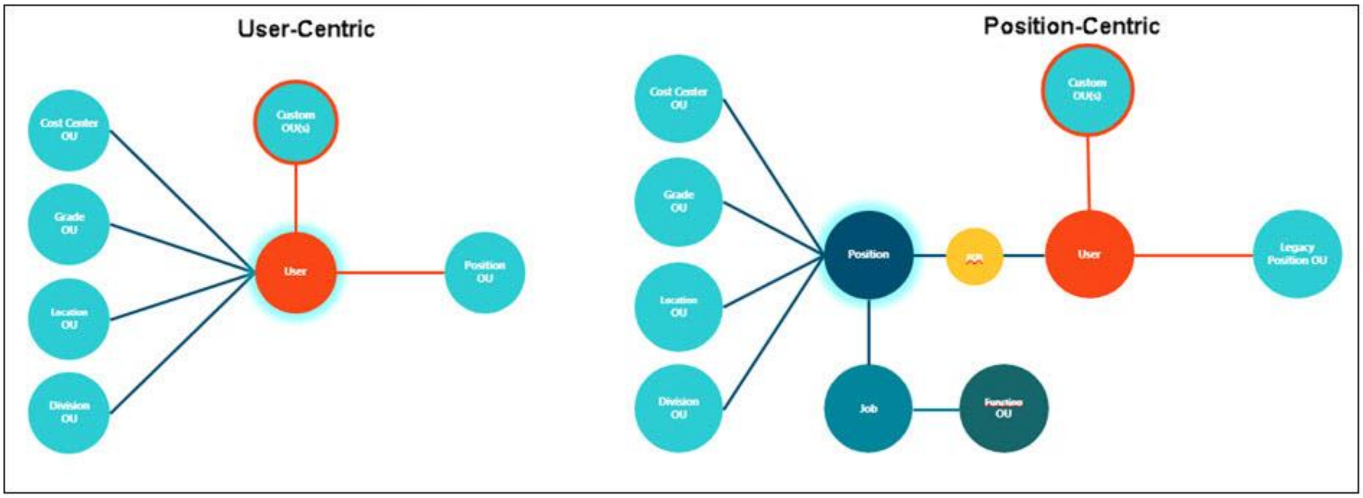
Visit and follow the **Content Studio Updates topic** and **playlist** in the Success Center for the full list of recent enhancements and the most up to date resources about Content Studio.

Cornerstone HR

Position Management

Position Management (Early Adopter) – Introduction & Functional Overview

Position Management helps organizations organize their workforce more efficiently by defining Positions as unique roles within the organization, categorizing them by Jobs and job-related functions, and structuring them by Organizational Units (OUs). This is achieved by moving from a user-centric structure to a position-centric structure that establishes a new hierarchical framework that streamlines talent processes and reporting.



As a part of the Cornerstone HR product suite, Position Management in CSX provides an additional option to define, consolidate and map organizational data structures to meet the next levels of demand and flexibility.

This is the first building block towards a position-centered foundation that empowers administrators to structure their organization around positions.

Key Features

Position Management's key features are as follows:

- Manage Positions - Manage complex organizational scenarios and simplify recurring changes by using a position-based organizational structure
- Manage Jobs - Collect or group several Positions together in a Job and setup a functional job structure
- Position Hierarchy - Specify the parent Position for each Position and to setup a Position based hierarchy representable in a Company Chart.
- Multiple assignments - One Employee can be assigned to multiple Positions and one Position can be assigned to multiple employees.
- Organizational Unit Assignments - Manage the Organizational Hierarchy and assign Organization Units to Positions.
- Identify Vacancies - The new relationship structure between Positions and Employees allows to identify and manage Vacancies.
- Full Time Equivalent (FTE) Management - The ability to maintain and track the utilization of an Employee or Position to identify over-utilization and under-utilization.
- Effective Date of Assignments - Schedule future changes and keep all historic assignments in the organization.

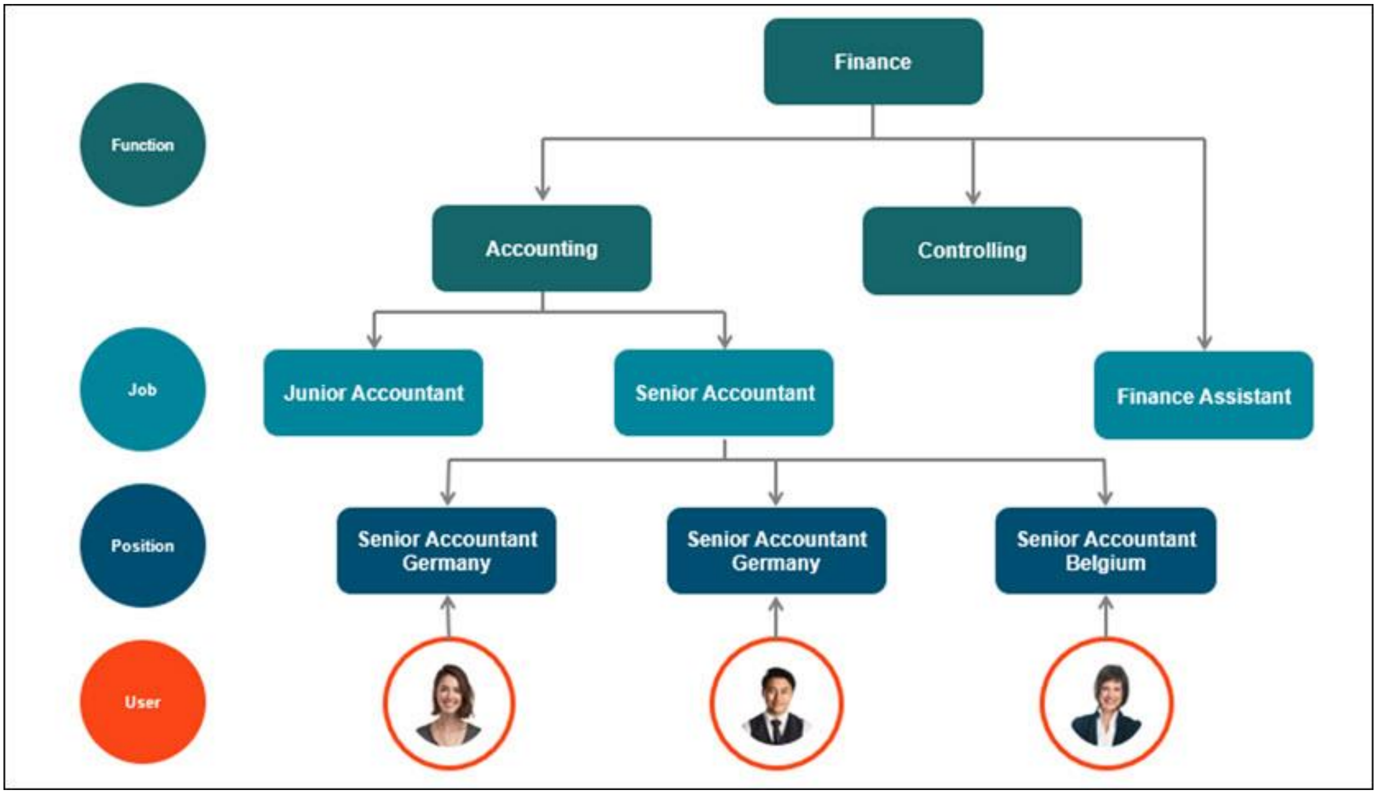
Essential Concepts

Position Management applies the following essential concepts:

- User - An employee in the organization with a unique ID and assigned Positions, referred to as Incumbencies.
    - Each Employee has at least one Position, but can also have several Positions.
    - Although an Employee can have multiple incumbencies, they normally have only one Position per Employee.
    - An Employee can be assigned to multiple Positions, but only one primary Position incumbency.
    - A Position can be assigned to multiple Employees, but only one primary Employee (Primary incumbent).
    - Reporting Relationships (Manager & Subordinates), general Job information and the Standard Organization Unit assignments are derived from the (primary) Position assignments.
- Position - A role or responsibility in the organization or one specific "seat" with a multilingual title, a unique ID, and an assigned Job.
    - Positions in a company are to be filled by individual holders - Employees or Users.
    - Although a Position can have multiple incumbents, it normally has only one single incumbent.
    - An Employee can be assigned to multiple Positions, but only one primary Position.
    - A Position can be assigned to multiple Employees, but only one primary Employee.
    - The Position remains, even when the Employee leaves the Position.
    - Each Position must be assigned to a Job. It is not possible to assign a Position to multiple Jobs.
    - Reporting relationships (Manager & Subordinates) and assignments to different types of Organization Units can be defined for each Position.
- Job - A collection or grouping of multiple Positions with a multilingual title, a unique ID, and may have a collection of Positions assigned to it.
    - The Job describes a number of different Positions which are engaged in similar work.
    - A Job is not concrete but rather the basis for the creation of various Positions with similar tasks and characteristics.
    - Jobs are used to group several related Positions together so that certain types of information and general characteristics can be defined at the Job level and then inherited by all assigned Positions.

    - A Position must always be related to a Job; Jobs serve as the layer for attributes that apply to all associated Positions.
    - Employees are not directly assigned to Jobs. The Job information can be pushed to Users through Position assignments.
    - A functional structure can be defined for each Job.
- Function - Each Job has an OU assignment with a connection between the Organizational Data and Jobs.
    - Assignment to a functional type of Organization Units can be defined for each Job.
    - The Organization Unit memberships of a User are derived from the assigned Jobs of all Position assignments.
    - The Unit Assignment remain, even when a Position changes the Job.
    - Job Unit Assignment can be defined for a Functional organizational hierarchical structure.

In practice, the Position Management structure appears as follows:



Position Management (Early Adopter) – Impact on CSX

Once Position Management (PM) is activated, its functionality impacts the following areas in CSX:

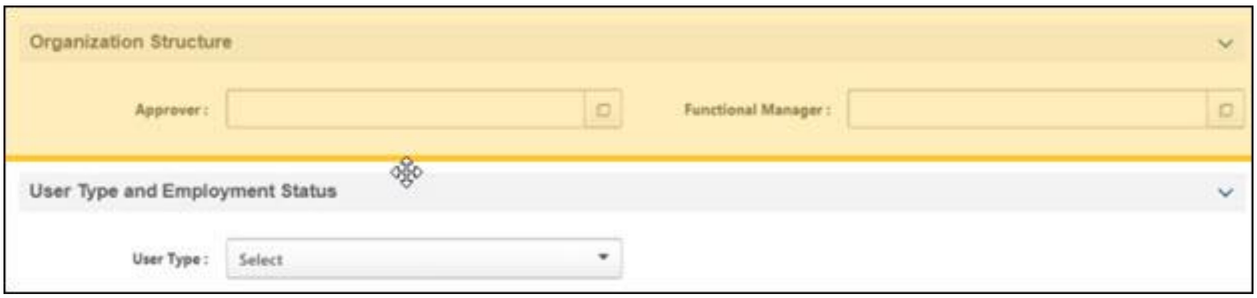
- User Record
- Organizational Units
- My Account Preferences
- Form Management
- Batch Edit Users
- Self-Registration
- Custom Field Administration

Expand each topic below to view the details. The information provided is based on whether the Postion is activated only or activated and synchronized.

User Record

PM impacts user records when creating or viewing/editing user records.

Creating a New User



PM Activated

The following existing Organizational Units (OUs) and fields will not appear on the user record when creating a new user:

- Division
- Location
- Cost Center
- Grade
- Manager

The following new existing Organizational Units (OUs) and fields will not appear on the user record when creating a new user:

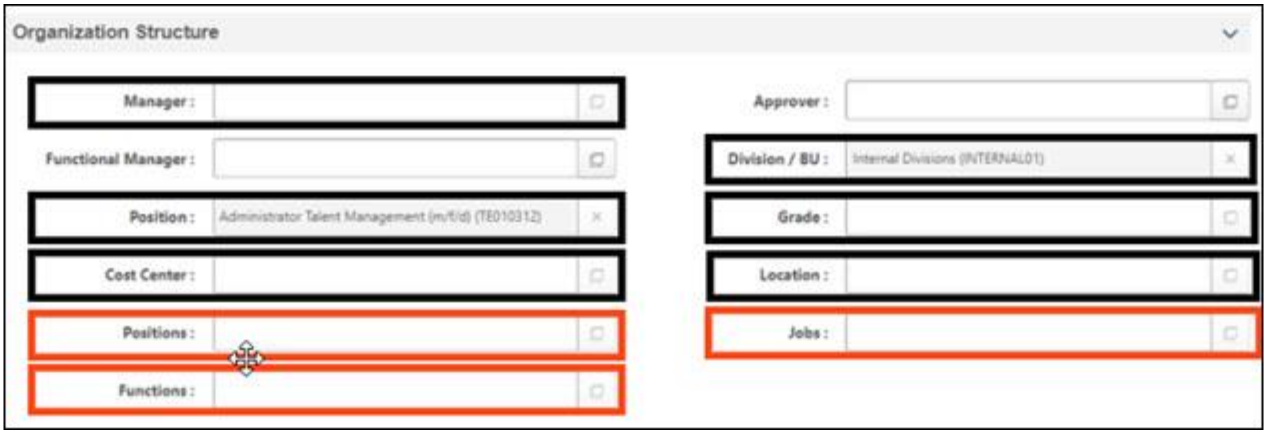
- Positions
- Jobs
- Functions

Note: Administrators must create the new user without this data first, and then, assign the newly created user to a Position in PM. As a result, the user is assigned to all the data listed above.

PM activated and synchronized

Same as above, and the existing Position OU is hidden.

Viewing/Editing Existing User Record



PM Activated

The following existing OUs and fields display as read-only in the user record for existing users:

- Division
- Location
- Cost Center
- Grade
- Manager

The following new OUs and fields will not appear on the user record for existing users:

- Positions
- Jobs
- Functions

Note: If an update is needed on data above, an administrator must perform the modification in the new PM workspace by changing the position assignment to employee.

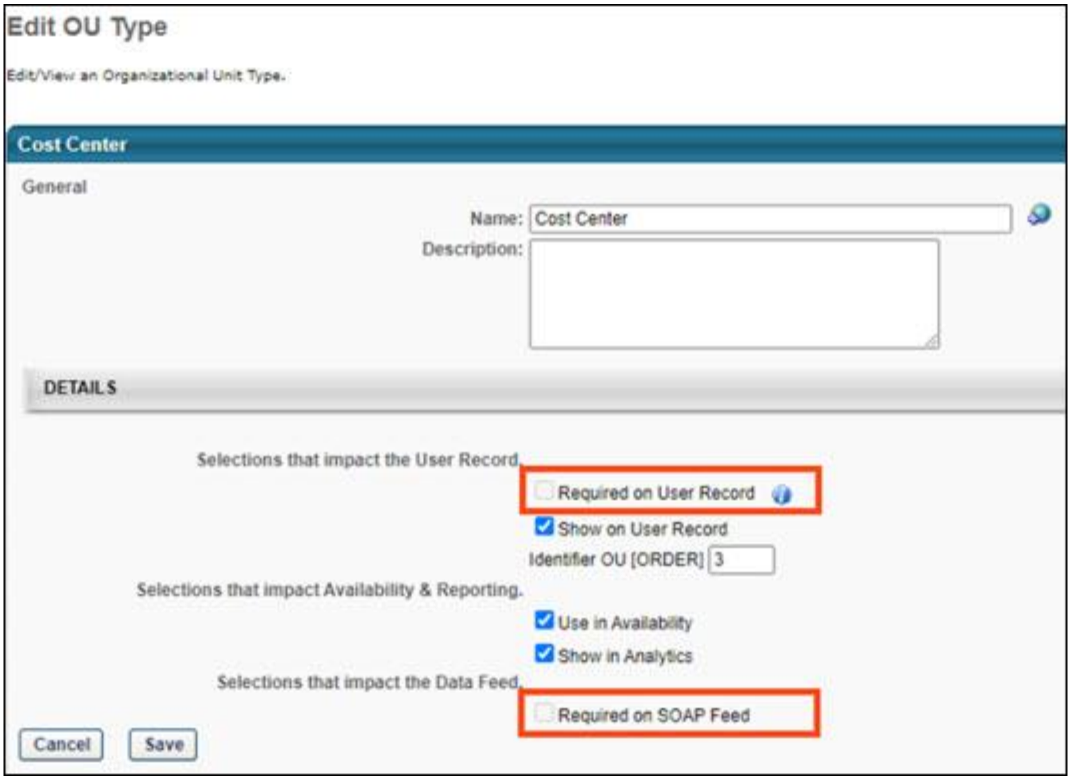
PM activated and synchronized

Same as above, and the existing Position OU is read-only.

Organizational Units

PM impacts required settings and when creating new OU values.

Required Settings



PM Activated

The following existing OUs cannot be set to **Required on User Record** or **Required on SOAP Feed**:

- Division
- Location
- Cost Center
- Grade

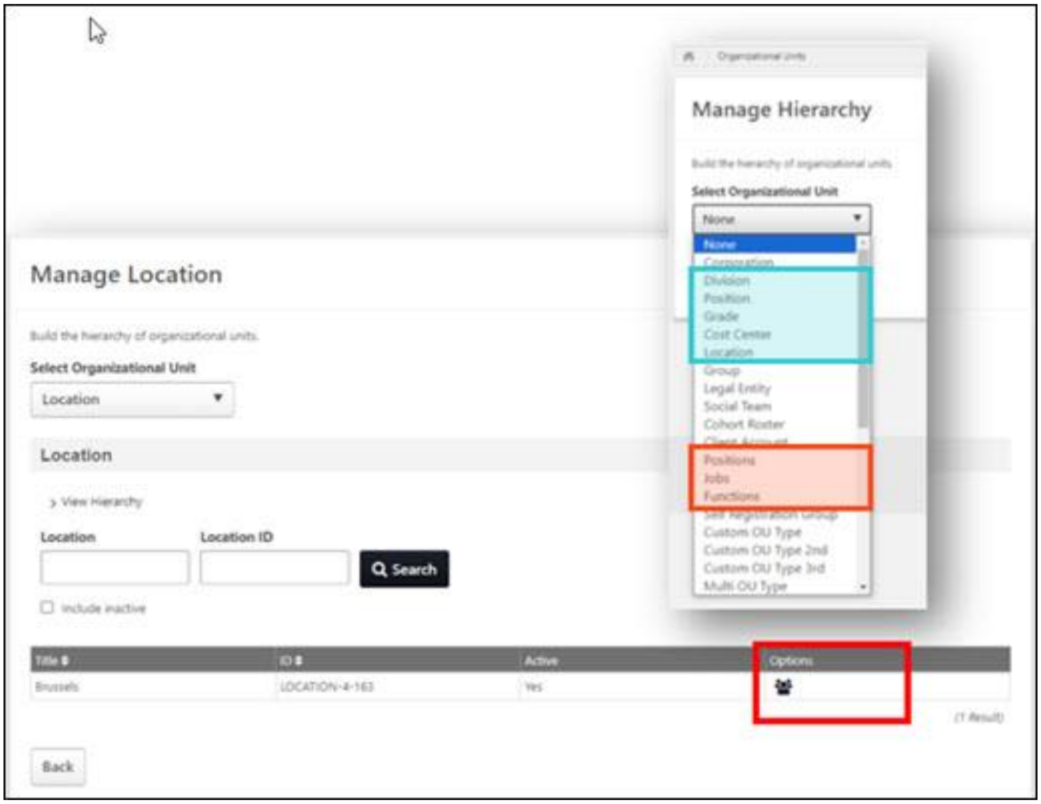
The following new OUs cannot be set to **Required on User Record** or **Required on SOAP Feed**:

- Positions
- Jobs
- Functions

PM activated and synchronized

Same as above, and the existing Position OU cannot be set to **Required on User Record** or **Required on SOAP Feed**.

Organizational Units - Creating New OUs



PM Activated

It is no longer possible to create a new value or edit an existing value in the hierarchy of the following existing OUs:

- Division
- Location
- Cost Center
- Grade

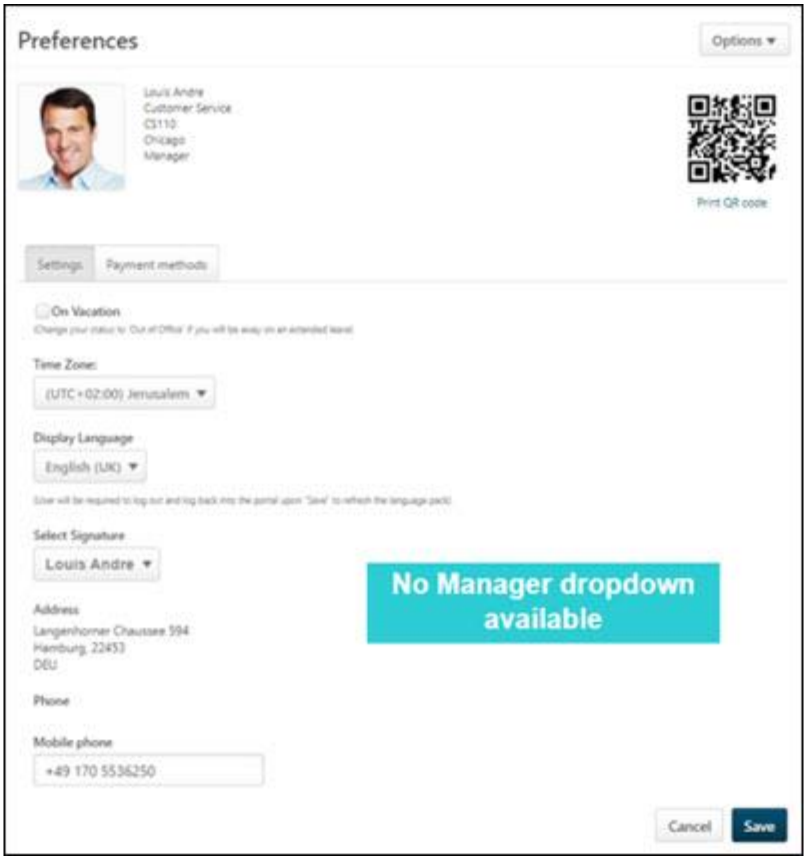
The management of these existing standard OUs is now done in Position Management, so these OU values are read-only in CSX. The list of active users tied to the OU values can still be opened and viewed.

The creation of new values for the new Ous (new Positions, Jobs, Functions) is now done in Position Management. The OUs are displayed as read-only. The list with active users in the selected OU can still be opened and viewed.

PM activated and synchronized

The behavior above also applies to the existing Position OU.

My Account Preferences



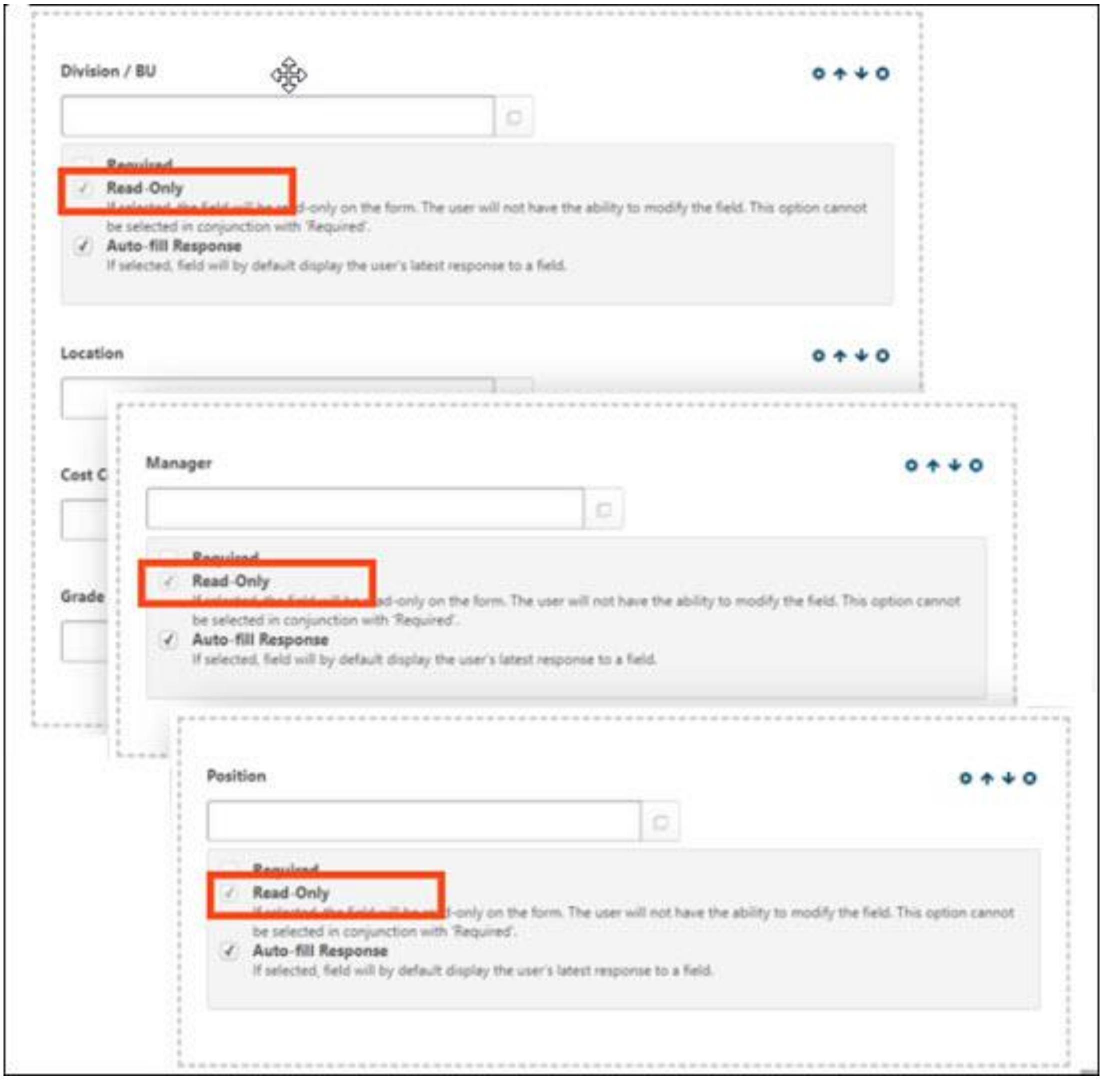
To avoid a modification of the manager of an employee, the **Manager** field is no longer available on the My Account Preferences Page.

In PM, the manager of an employee is the person in the parent position of the employee's primary position, for example the "Country Sales Manager France" and "Country Sales Manager Germany" Positions report to Parent Position "Head Sales Europe".

Form Management

PM impacts form builder, form approval, form tasks, and form copy and edit.

Form Builder



PM Activated

The following existing OUS and fields can be added as read-only to ensure data consistency:

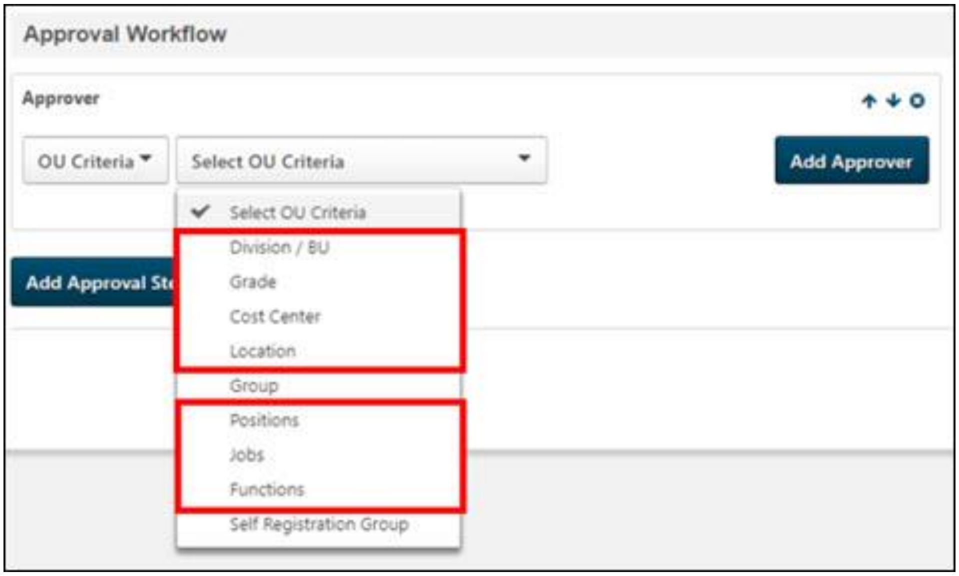
- Division
- Location
- Cost Center
- Grade
- Manager (Read-only)

When a future effective date change is scheduled in PM, the fields above display the current values in the form.

PM activated and synchronized

Same as above, and the existing Position OU can be added as read-only.

Form Approval



PM Activated

The following existing OUs can be selected as criteria to define the Approver:

- Division
- Location
- Cost Center
- Grade
- Position

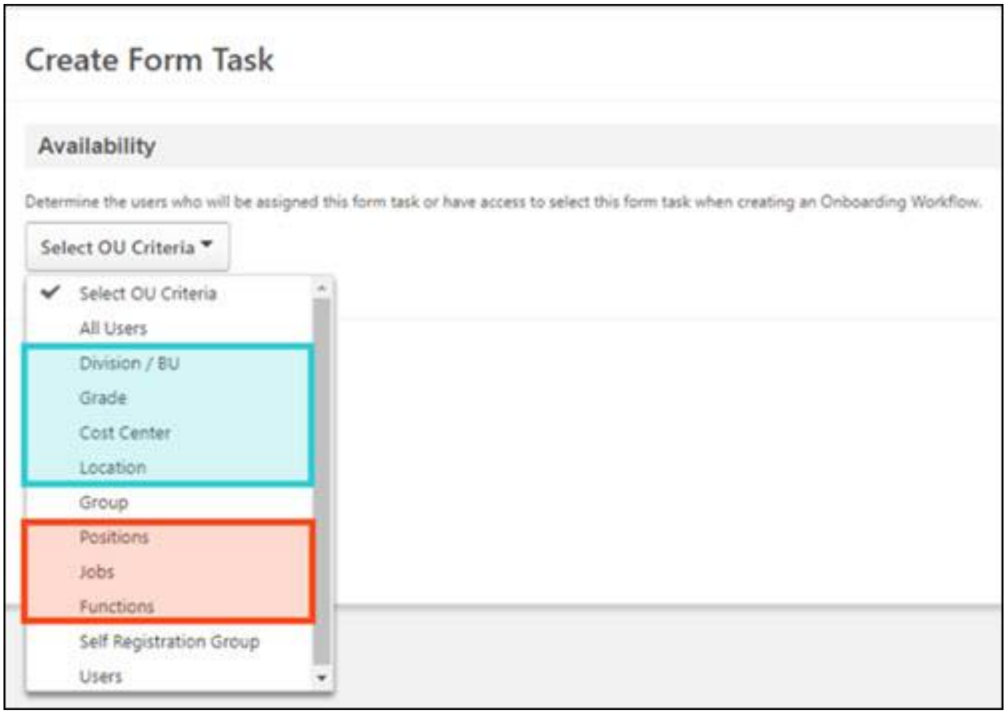
The following new OUs can be selected as criteria to define the Approver:

- Positions
- Jobs
- Functions

PM activated and synchronized

The existing Position OU can no longer be selected as criteria to define the Approver.

Form Tasks



PM Activated

The following existing OUs can be selected as criteria to define the target employees through availability:

- Division
- Location
- Cost Center
- Grade
- Position

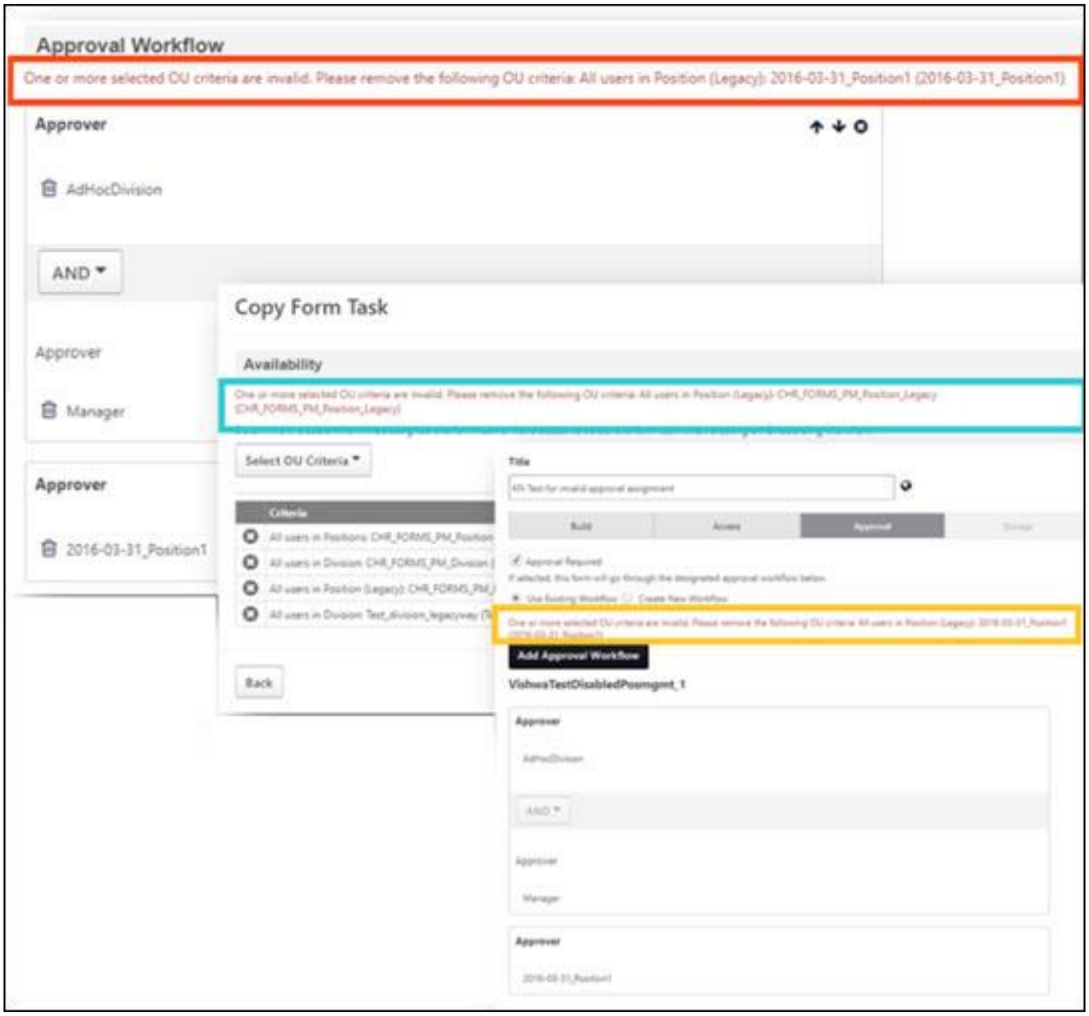
The following new OUs can be selected as criteria to define the target employees through availability:

- Positions
- Jobs
- Functions

PM activated and synchronized

The existing Position OU can no longer be selected as criteria to define the target employees through availability.

Form Copy and Edit



PM Activated

Once PM is activated, when copying an existing form or form task created before activation, the system ensures that the configuration observes the new PM rules. If a configuration is not at the correct form or task level, an error message appears. For example, PM does not allow administrators to update a user's Division OU. If an administrator tries to do this, an error message appears. This also applies to Location, Grade, and Cost Center.

PM activated and synchronized

The logic above also applies to the existing Position OU.

Batch Edit Administration

PM affects the creation of a new batch edit user's job and copying or editing an existing batch edit user's job.

Create a New Batch Edit Users Job

PM Activated

The following existing OUs and fields are no longer available to edit in batch for existing users:

- Division
- Location
- Cost Center
- Grade
- Manager

Note: It is possible to target the users for batch edit using the new PM Positions, Jobs, and Functions OUs.

PM activated and synchronized

Same as above, and the existing Position OU is no longer available to edit in batch for existing users.

Editing and Copying an Existing Batch Edit Users Job

PM Activated

Once PM is activated, when copying a batch edit users job created before activation, the system ensures that the configuration observes the new PM rules. If an invalid configuration coming from the original batch edit users job copies, an error message appears. Additionally, the job can be saved, but not processed. For example, PM does not allow administrators to copy a batch edit users job set to update the user's Division OU. If an administrator tries to do this, an error message appears, the job is not processed, but can be saved as a draft. This also applies to Location, Grade, and Cost Center.

PM activated and synchronized

Same as above, and the existing Position OU is no longer available to edit in batch for existing users.

Self-Registration

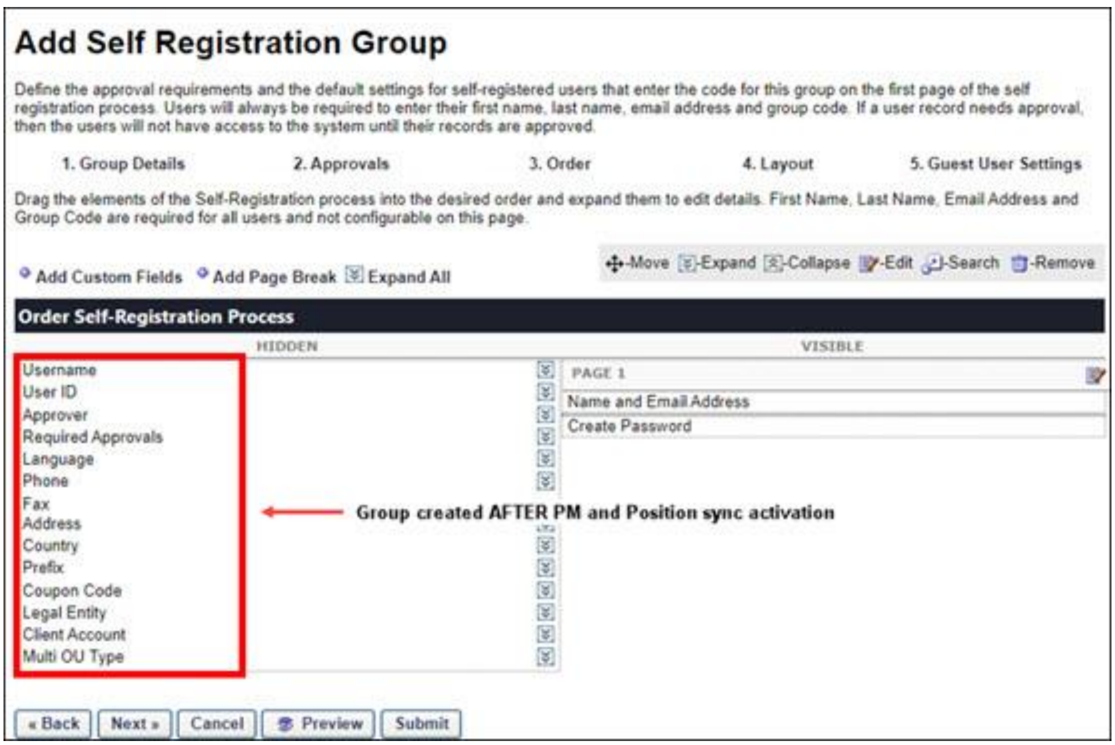
PM affects the self-registration approval workflow for new self-registration groups and existing self-registration groups.

Approval workflow for new self registration groups

Once PM is activated, administrators can no longer create new Self-Registration Groups based on Manager approvals as the Manager is unknown for non-existing users and should come from a user's position assignment.

For example, if the PM activation date is 5/1/24, and the self-registration creation date is 3/15/23, the Manager option is available and can be configured.

If the PM activation date is 5/1/24, and the self-registration group creation date is 5/15/24, the Manager option is not available.



PM Activated

The following existing OUs and fields are no longer available as options in the self-registration process:

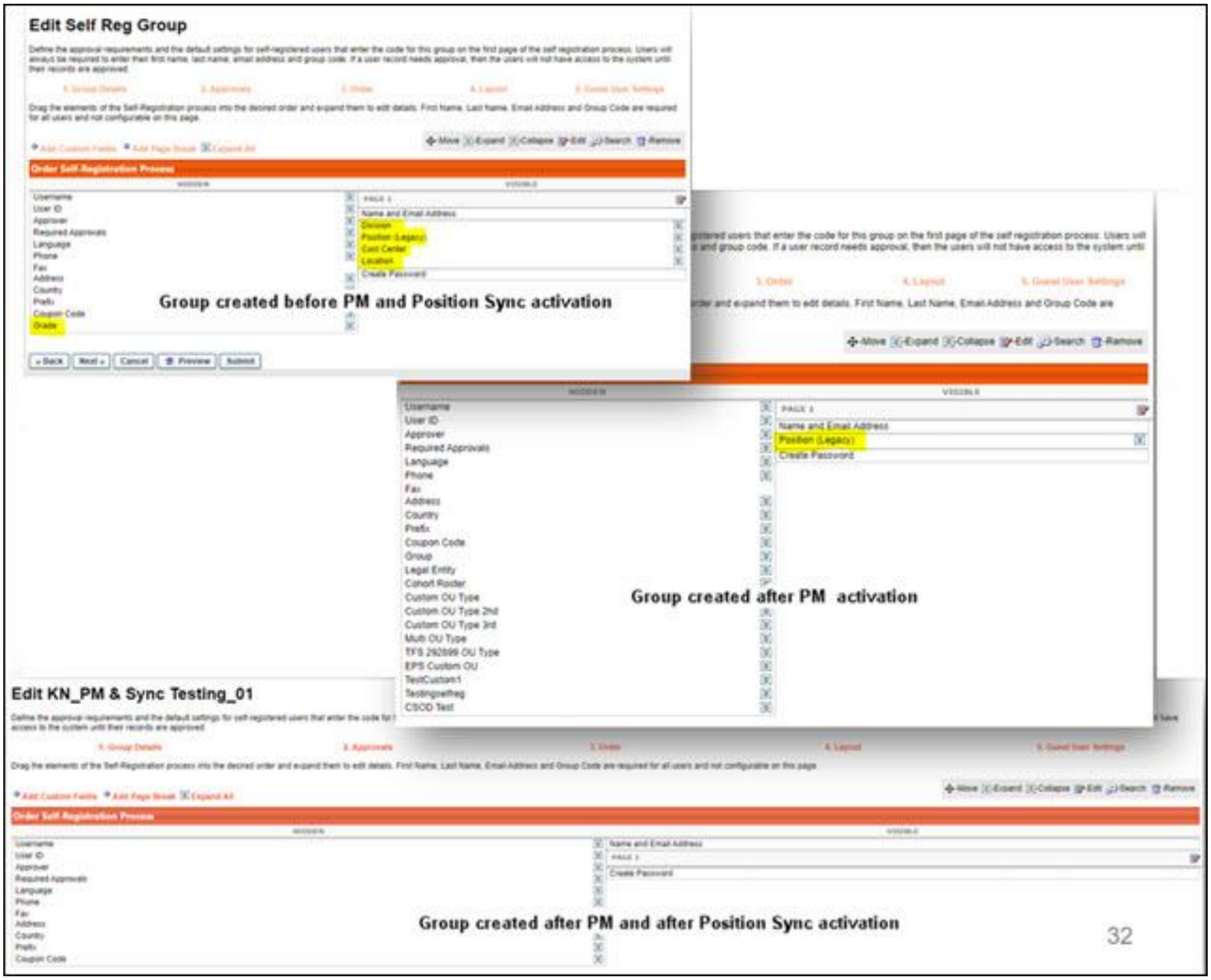
- Division
- Location
- Cost Center
- Grade
- Manager

Note: An employee's Division, Location, Cost Center, Grade, and Manager are based on the employee's assigned position.

PM activated and synchronized

Same as above, and the existing Position OU is no longer available as an option in the self-registration process.

Approval workflow for existing self registration groups



PM Activated

- When editing or copying an existing self-registration group created before PM activation, the system ensures that the configuration observes the new PM rules.
- If the Manager option was not selected in approval workflow, it will not display as an option.
- If the Manager option was selected in approval workflow, it will be hidden, but will still be present, configured behind the scenes, and still apply. This is a known limitation.
- To avoid creating bad data in the system, we added a task that must be completed before PM is activated to identify the Self Reg groups that are based on manager approval and deactivate those identified self-Reg groups before enabling PM.

The following existing self-registrarion groups created before PM still include the following OUs and fields:

- Division
- Location
- Cost Center
- Grade
- Manager

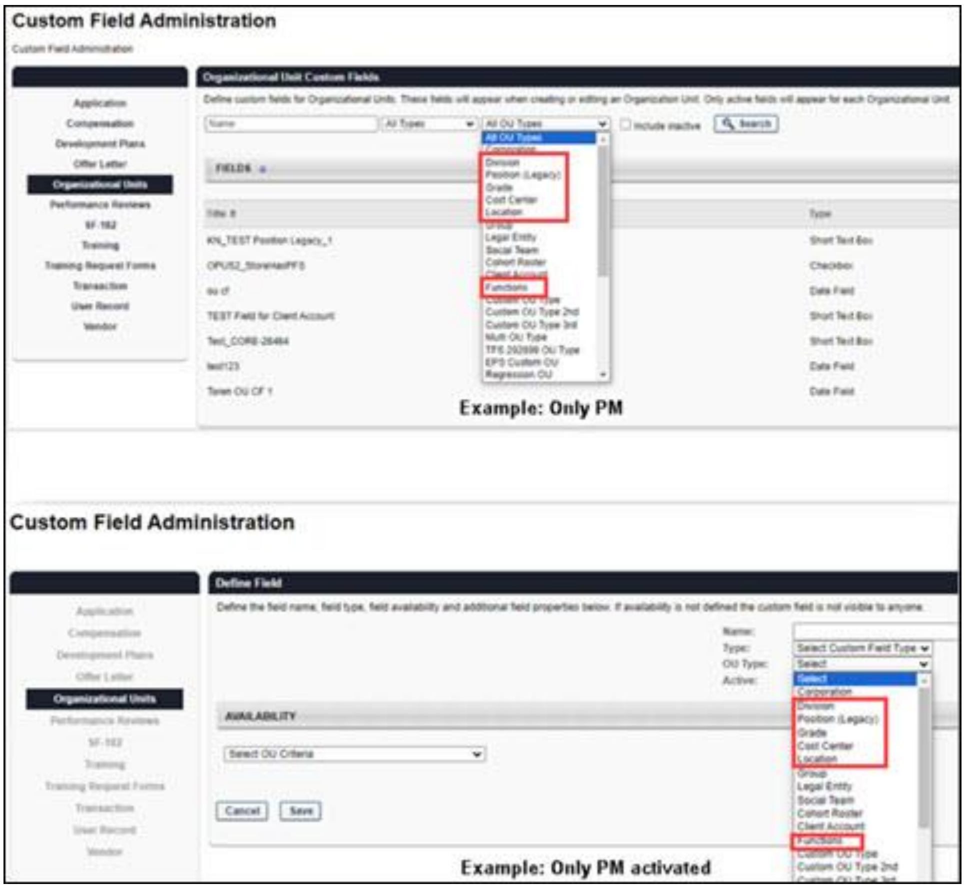
PM activated and synchronized

Self-registration groups created before PM enablement still include the existing Position OU if configured.

Custom Field Administration

PM impacts Custom Field Administration when creating new custom fields and for availability.

Create New Custom Fields



PM Activated

Administrators can create custom fields for the existing OUs as follows:

- Division
- Location
- Cost Center
- Grade

- Position

Administrators can create new custom fields for the following:

Functions

Note: Custom Fields for new Positions and new Jobs are not supported as part of the November '23 release.

PM activated and synchronized

It is no longer possible to create custom fields for the existing Position OU.

Availability

The following existing OUs can be selected as criteria to define the target employees through availability:

- Division
- Location
- Cost Center
- Grade
- Position

The following new OUs can be selected as criteria to define the target employees through availability:

- Positions
- Jobs
- Functions

PM activated and synchronized

It is no longer possible to select the existing Position OU when defining availability of custom fields.

Position Management (Early Adopter) – Enablement and Implementation

The transition from a user-centric data model to the position-centric data model will be fully supported by CSX engineering teams.

Cornerstone will provide support and guidance throughout the transition to ensure a seamless and successful implementation of Position Management using the following approach:

1. Perform a needs assessment
    - Identify requirements and objectives.
    - Gather input from relevant stakeholders on key features fit.
    - Position Management Activation
    - Activate Position Management & CSX Core synchronization.
    - Ensure existing features and functions are not causing data inconsistency or circular references.
2. Activate Position Management
    - Activate Position Management & CSX Core synchronization.
    - Ensure existing features and functions are not causing data inconsistency or circular references.
3. Manage Data Migration / Data Load
    - Plan, review, update existing data structures.
    - Execute data migration / load process.
4. Configure portal
    - Adapt integrations (in and out) to the data format requirements of Position Management.
    - Adjust system configurations already in place as needed, such as security roles, reporting, Welcome pages, and groups.
5. Train users to use Position Management.
6. Test and implement Position Management in a limited/controlled environment to identify and address any issues before a full-scale deployment.
7. Rollout a similar implementation within the customer's production environment.

Position Management (Early Adopter) - Security

Position Management provides a easy-to-undrstand security model as well as new permissions that allow authorized users to manage critical details for Positions, Jobs, Functions, and standard Organizational Units (OUs).

Security Overview

The image below provides details about PM security:

New PM Permissions

PM provides the following new permissions:

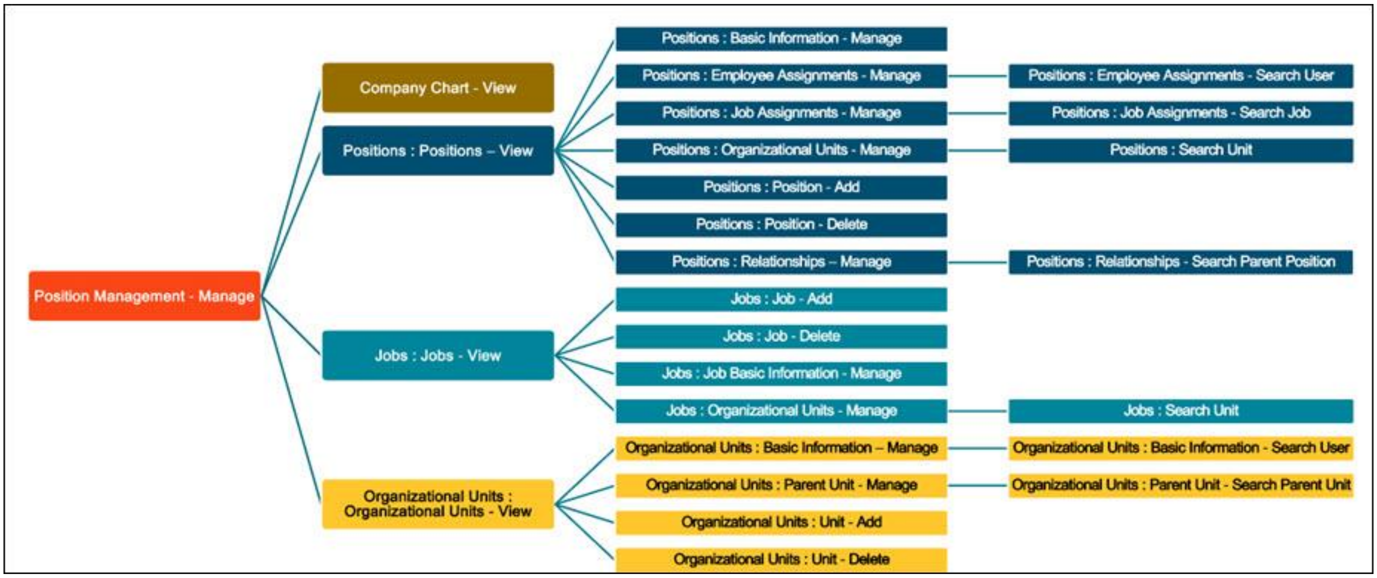
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Position Management - Manage	Grants users the ability to access Position Management. This permission cannot be constrained.	Position Management
Company Chart - View	Grants users the ability to access the Position Management Company Chart. This permission cannot be constrained.	Position Management
Positions: Positions - View	Grants users the ability to view positions. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Positions: Basic Information - Manage	Grants users the ability to manage general information of positions.	Position Management
Positions: Employee Assignments - Manage	Grants users the ability to manage user assignments to positions. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Positions: Employee Assignments - Search User	Grants users the ability to view users when assigning them to positions. This permission can be constrained by User's Corporation, User's Standard OUs, Custom OUs, Positions, Jobs, and Functions.	Position Management

Positions: Job Assignments - Manage	Permission that allows users to manage job assignments to positions. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Positions: Job Assignments - Search Job	Grants users the ability to view jobs when assigning jobs to positions. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Positions: Organizational Units - Manage	Grants users the ability to manage standard organizational units and Functions assignments to positions. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Positions: Position - Add	Grants users the ability to add positions. This permission cannot be constrained.	Position Management
Positions: Position - Delete	Grants users the ability to delete positions. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Positions: Relationships - Manage	Grants users the ability to manage parent position assignments to positions. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Position: Relationships - Search Parent Position	Grants users the ability to view positions when assigning the parent.	Position Management
Positions: Search Unit	Grants users the ability to view standard organizational units and Functions when assigning the parent.	Position Management
Jobs: Jobs - View	Grants users the ability to view jobs. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Jobs: Job - Add	Grants users the ability to add jobs. This permission cannot be constrained.	Position Management
Jobs: Job - Delete	Grants users the ability to delete jobs. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Jobs: Job Basic Information - Manage	Grants users the ability to manage general information of jobs. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Jobs: Organizational Units - Manage	Grants users the ability to assign Functions to jobs. This permission can be constrained by Standard OUs, Positions, Jobs, and Functions.	Position Management
Jobs: Search Unit	Grants users the ability to view Functions when assigning Functions to jobs. This permission can be constrained by Functions.	Position Management

Organizational Units: Organizational Units - View	Grants users the ability to view standard organizational units and Functions, including full visibility of the hierarchy of the organizational unit. This permission can be constrained by Standard OUs and Functions.	Position Management
Organizational Units: Basic Information - Manage	Grants users the ability to manage general information of standard organizational units and Functions. This permission can be constrained by Standard OUs and Functions.	Position Management
Organizational Units: Basic Information - Search User	Grants users the ability to set the owner on standard organizational units and Functions. This permission can be constrained by User's Corporation User's Standard OUs, Custom OUs, Positions, Jobs, Functions, and User Standard OUs.	Position Management
Organizational Units: Parent Unit - Manage	Grants users the ability to manage parent unit assignments of standard organizational units and Functions. This permission can be constrained by Standard OUs and Functions.	Position Management
Organizational Units: Parent Unit - Search Parent Unit	Grants users the ability to view standard organizational units and Functions when assigning the parent. This permission can be constrained by Standard OUs and Functions.	Position Management
Organizational Units: Unit - Add	Grants users the ability to add standard organizational units and Functions. This permission cannot be constrained.	Position Management
Organizational Units: Unit - Delete	Grants users the ability to delete standard organizational units and Functions. This permission can be constrained by Standard OUs and Functions.	Position Management

Note: For information about Reporting permissions, *See* **Position Management (Early Adopter) - Reporting** on page 69 *for additional information.*

The image below shows the hierarchical relationships between the different positions.



Position Management (Early Adopter) - Reporting

Reporting in Position Management provides the necessary data and insights to optimize workforce planning, compliance, resource allocation, and decision-making by:

- Enabling organizations and administrators to report on Position and Job-related data to export relevant information for your positions and jobs.
- Including the assigned Position(s) and Job(s) into User reports.
- Supporting the ability for users to differentiate between current, planned, & past Positions and Job assignments.
- Providing permissions and constraints capabilities.

With this release, Position Management introduces two new report types:

- Position Report
- Job Report

The User Report is also updated for use with Position Management.

Note: Currently, it is not possible to combine Position and Job-related reports with other report types.

Note: You must enable Position Management to view the new report types.

Position Management Reporting Fields

Position Management provides reporting fields for the Position Report, Job Report, and User Report.

Position Report Fields

Field Name	Sub-section	Description	Type
Assigned Employee	Employee Assignment	Assigned employee name	Text
Assigned Employee Effective Date	Employee Assignment	Effective date of position-employee assignment	Date
Assigned Employee End Date	Employee Assignment	End date of position-employee assignment	Date
Assigned Employee ID	Employee Assignment	Assigned employee ID	Text
Assigned Job	Job Assignment	Assigned job title	Text
Assigned Job Effective Date	Job Assignment	Effective date of position-job assignment	Date
Assigned Job ID	Job Assignment	Assigned job ID	Text
Assigned Unit	Unit Assignment	Assigned unit name	Text

Assigned Unit Effective Date	Unit Assignment	Effective date of position unit assignment	Date
Assigned Unit End Date	Unit Assignment	End date of position unit assignment	Date
Assigned Unit ID	Unit Assignment	Assigned unit ID	Text
Employee Assignment Notes	Employee Assignment	Notes on the employee assignment	Text
Employee Assignment Type	Employee Assignment	Employee assignment type (History, Current or Planned)	Text
FTE	Position Status	Full-time equivalent (FTE) of position (can be 1 as a maximum)	Decimal
FTE Utilized By All Employees	Position FTE Overview	FTE Utilized By All Employees assigned to the Position	Integer
FTE Utilized By Employee In This Position	Employee Assignment	FTE of position-employee assignment	Decimal
Is Current Employee Assignment	Employee Assignment	Yes / No field to indicate if the employee assignment is current or not	Boolean
Is Current Job Assignment	Job Assignment	Yes / No field to indicate if the job assigned to the position is current or not	Boolean
Is Current Parent Assignment	Parent Relation	Yes / No field to indicate if the parent position assignment is current or not	Boolean
Is Current Position Status	Position Status	Yes / No field to indicate if the position status (active or inactive) is current or not	Boolean
Is Current Unit Assignment	Unit Assignment	Yes / No field to indicate if the position unit assignment is current or not	Boolean
Job Assignment Notes	Job Assignment	Notes on the job assignment	Text
Job Assignment Type	Job Assignment	Job assignment type (History, Current or Planned)	Text
Multiple Incumbents Allowed	Position Basic Details	Position setting to allow or not to assign multiple employees to the same position	Boolean

Number Of Assigned Employees	Position FTE Overview	Number Of Assigned Employees to the Position	Integer
Parent Assignment Notes	Parent Relation	Notes on the parent position assignment	Text
Parent Assignment Type	Parent Relation	Parent assignment type (History, Current or Planned)	Text
Parent Effective Date	Parent Relation	Effective date of parent position assignment	Date
Parent End Date	Parent Relation	Unassign date of parent position assignment	Date
Parent Position	Parent Relation	Assigned parent position title	Text
Parent Position ID	Parent Relation	Assigned parent position ID	Text
Parent Relation	Parent Relation	Position reporting hierarchy type: direct or functional (ie. dotted line relationship)	Text
Position Description	Position Basic Details	Position description	Text
Position ID	Position Basic Details	Unique identifier for the position	Text
Position Status	Position Status	Position status (Active or Inactive)	Boolean
Position Status Effective Date	Position Status	Effective date of position status	Date
Position Status Notes	Position Status	Notes on the position status	Text
Position Status Type	Position Status	Position status type (History, Current or Planned)	Text
Position Title	Position Basic Details	Position title	Text
Primary Incumbent	Employee Assignment	Yes / No field to indicate if an employee is the primary incumbent of assigned position	Boolean
Primary Position	Employee Assignment	Yes / No field to indicate if a position is the primary position of an assigned employee	Boolean

Remaining FTE In This Position	Position FTE Overview	Remaining FTE In this Position	Integer
Unit Assignment Type	Unit Assignment	Unit assignment type (History, Current or Planned)	Text
Unit Type	Unit Assignment	Unit type of position unit assignment (ie. Location, Division, Grade, Cost Center)	Text
Utilization Control	Position Basic Details	Position setting to prevent exceeding the FTE allocated to the position across employees FTEs	Boolean

Job Report Fields

Field Name	Sub-section	Description	Type
Assigned Position	Assigned Positions	Assigned position title	Text
Assigned Position Effective Date	Assigned Positions	Effective date of position-job assignment	Date
Assigned Position ID	Assigned Positions	Assigned position ID	Text
Assigned Unit	Unit Assignment	Assigned unit name, such as name of the function	Text
Assigned Unit Effective Date	Unit Assignment	Effective date of function assigned to the job	Date
Assigned Unit End Date	Unit Assignment	End date of job unit assignment	Date
Assigned Unit ID	Unit Assignment	Assigned unit ID, such as ID of the function	Guid
Is Current Job Status	Job Status	Yes / No field to indicate if the job status (active or inactive) is current or not	Bit
Is Current Unit Assignment	Unit Assignment	Yes / No field to indicate if the job status (active or inactive) is current or not	Bit
Job Description	Job Basic Details	Job description	Text
Job ID	Job Basic Details	Unique identifier for the job	Text
Job Status	Job Status	Job status (Active or Inactive)	Text
Job Status Effective Date	Job Status	Effective date of job status	Date
Job Status Notes	Job Status	Notes on the job status	Text
Job Status Type	Job Status	Job status type (History, Current or Planned)	Text
Job Title	Job Basic Details	Job title	Text
Number Of Employees	Job FTE Overview	Number Of Assigned Employees to the job (through positions)	Integer

Number Of Positions	Job FTE Overview	Number Of Assigned Positions to the job	Integer
Number Of Vacant Positions	Job FTE Overview	Number Of Vacant Positions across all positions assigned to the job	Integer
Total Position FTE	Job FTE Overview	Total Position FTE across all positions assigned to the job	Decimal
Total Utilized FTE By All Employees	Job FTE Overview	Total Utilized FTE By All Employees across all positions assigned to the job	Decimal
Unit Assignment Type	Unit Assignment	Unit assignment type (History, Current or Planned)	Text
Unit Type	Unit Assignment	Unit type of job unit assignment. It will be Function for Jobs	Text

User Report Fields

Field Name	Sub-section	Description	Type
Assigned Unit	Unit Assignment	Assigned unit name	Text
Assigned Unit ID	Unit Assignment	Assigned unit ID	Guid
Effective Date	Positions	Effective date of position-employee assignment	Date
End Date	Positions	End date of position-employee assignment	Date
Job	Jobs	Job title	Text
Job Description	Jobs	Job description	Text
Job ID	Jobs	Unique identifier for the job	Text
Position	Positions	Position title	Text
Position Description	Positions	Position description	Text
Position ID	Positions	Unique identifier for the position	Text
Primary Incumbent	Positions	Yes / No field to indicate if an employee is the primary incumbent of assigned position	Boolean
Primary Position	Positions	Yes / No field to indicate if a position is the primary position of an assigned employee	Boolean
Unit Description	Unit Assignment	Assigned unit Description	Text
Unit Type	Unit Assignment	Unit type of user unit assignment (Division, Location, Grade, Cost Center, Function)	Text

Reporting Permissions

PM provides reporting permissions for the report level simplified model and granular model.

Simplified Model

The simplified permission model is ideal for customers with less complex reporting needs, and allows the ability to quickly grant access by report type.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Position Management - PositionReport - View	Grants users the ability view the Position Report. This permission can be constrained by: • User's Standard OU • User's Custom OU • User's Positions • User's Jobs • User's Functions AND • Standard OU • Custom OU • Positions • Jobs • Functions	Reports - Position Management
Reporting - Position Management - PositionReport – Manage	Grants users the ability to make changes and run the Position Report. This permission cannot be constrained.	Reports - Position Management
Reporting – Position Management – JobReport – View	Grants users the ability to view the Job Report. This permission cannot be constrained.	Reports - Position Management
Reporting – Position Management – JobReport – Manage	Grants users the ability to make changes and run the Job Report. This permission cannot be constrained.	Reports - Position Management

Granular Model

The granular model uses the Reporting 2.0 permissions to allow you to create more specific reports by report field. For this reason, permissions are at more of a granular level with this functionality.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Position Management - View	Grants users the ability to view the Position Report. This permission cannot be constrained.	Reports - Position Management
Reporting - Position Management - Manage	Grants users the ability to make changes and run the Position Report. This permission cannot be constrained.	Reports - Position Management

Reporting – Position Management – JobReport – View	Grants users the ability to view the Job Report. This permission cannot be constrained.	Reports - Position Management
Reporting – Position Management – JobReport – Manage	Grants users the ability to make changes and run the Job Report. This permission cannot be constrained.	Reports - Position Management
Reporting - Position Management - Position – View	Grants users the ability to view the Position Report. This permission can be constrained by: • User's Standard OU • User's Custom OU • User's Positions • User's Jobs • User's Functions AND • Standard OU • Custom OU • Positions • Jobs • Functions	Reports - Position Management
Reporting - Position Management - Position – Manage	Grants users the ability to make changes and run the Job Report. This permission cannot be constrained.	Reports - Position Management

Position Management (Early Adopter) - Edge Import

Once Position Management (PM) is activated, its environment becomes the master data system for Position data, related Standard OU,s and Employee assignments.

New data loads will be available via Edge Import to support bulk data maintenance for all relevant PM entities.

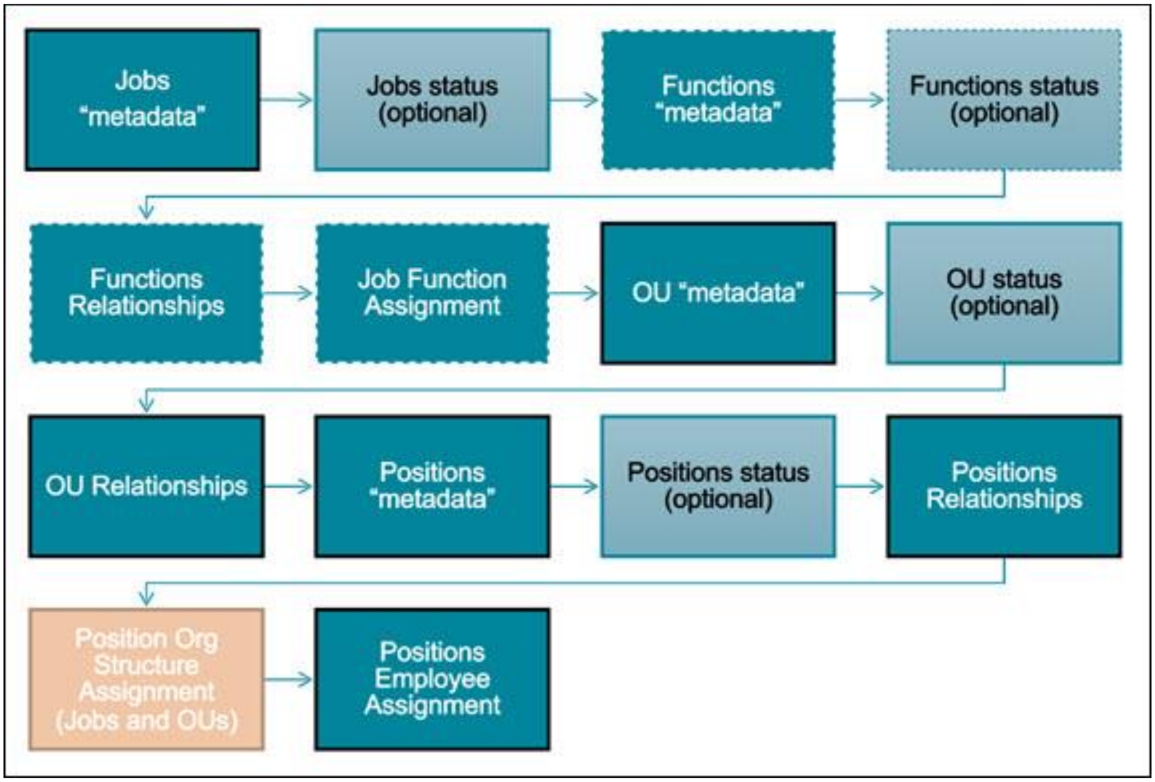
New Key Features

The following new features apply:

- New data loads
- Positions, Jobs, Functions, OUs: Division, Location, Cost Center, Grade (Metadata including translations)
- Status (Effective dated)
- Relationships (Effective dated)
- Assignments (Effective dated)
- Feeds
- Bulk API

Position Management Data Import

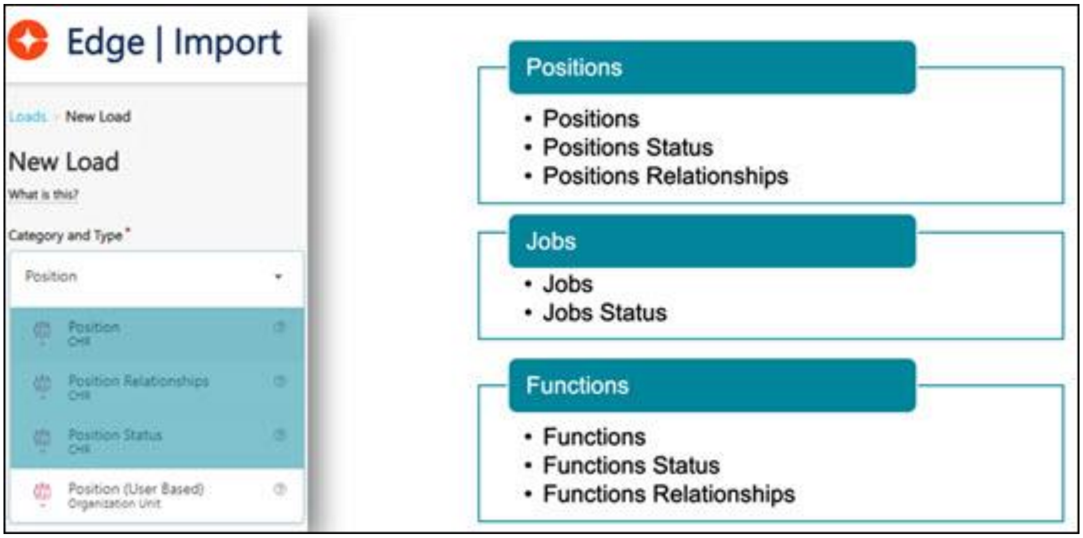
The image below displays a typical PM data import sequence:



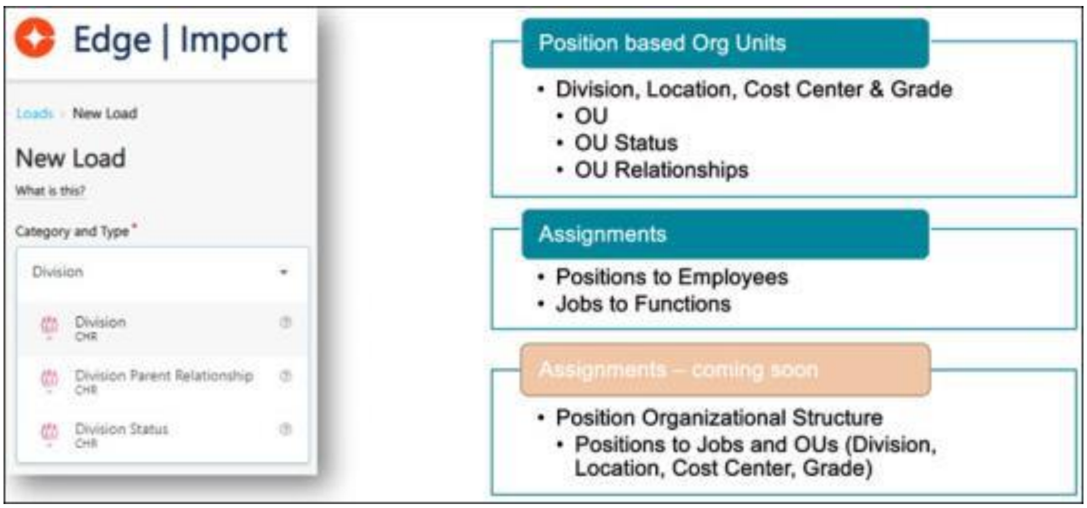
Data Loads

Edge import provides dedicated data loads for new PM entities and position-based OUs and assignments.

New Data Entities



Position-based OUs and Assignments



Changes for Existing Loads

For Organizational Unit category user-based loads:

- Configurations are no longer supported
- Load types:
    - Division
    - Location
    - Cost Center
    - Grade
    - Position **Note:** Position is only relevant for the PM enabled and synchronized implementation scenario.

For employee loads:

- Configurations with Position Management based fields are no longer supported.

- Fields: Manager, Division OU, Location OU, Cost Center OU, Grade OU, Position OU. **Note:** Position OU is only relevant for the PM enabled and synchronized implementation scenario.

Considerations

- The November '23 version of the Position metadata load supports only Job assignments.
- The OU Reconciliation feature available for the Ogranizational Unit user-based category loads is not supported for CHR Position-based category loads.
- Known issue: The **Allow reconciliation** field is available for OU records in the Position Management administration.

Permissions

PM provided the following Edge Import permissions:

- Edge Import - CHR - Cost Center
- Edge Import - CHR - Cost Center - Bulk API
- Edge Import - CHR - Cost Center – Feed
- Edge Import - CHR - Cost Center Relationships
- Edge Import - CHR - Cost Center Relationships - Bulk API
- Edge Import - CHR - Cost Center Relationships – Feed
- Edge Import - CHR - Cost Center Status
- Edge Import - CHR - Cost Center Status - Bulk API
- Edge Import - CHR - Cost Center Status - Feed
- Edge Import - CHR - Division
- Edge Import - CHR - Division - Bulk API
- Edge Import - CHR - Division - Feed
- Edge Import - CHR - Division Relationships
- Edge Import - CHR - Division Relationships - Bulk API
- Edge Import - CHR - Division Relationships - Feed
- Edge Import - CHR - Division Status
- Edge Import - CHR - Division Status - Bulk API
- Edge Import - CHR - Division Status - Feed
- Edge Import - CHR - Grade
- Edge Import - CHR - Grade - Bulk API
- Edge Import - CHR - Grade - Feed
- Edge Import - CHR - Grade Relationships
- Edge Import - CHR - Grade Relationships - Bulk API
- Edge Import - CHR - Grade Relationships - Feed
- Edge Import - CHR - Grade Status
- Edge Import - CHR - Grade Status - Bulk API
- Edge Import - CHR - Grade Status - Feed
- Edge Import - CHR - Location
- Edge Import - CHR - Location - Bulk API
- Edge Import - CHR - Location - Feed
- Edge Import - CHR - Location Relationships

- Edge Import - CHR - Location Relationships - Bulk API
- Edge Import - CHR - Location Relationships - Feed
- Edge Import - CHR - Location Status
- Edge Import - CHR - Location Status - Bulk API
- Edge Import - CHR - Location Status - Feed
- Edge Import - CHR - Job
- Edge Import - CHR - Job - Bulk API
- Edge Import - CHR - Job - Feed
- Edge Import - CHR - Job Status
- Edge Import - CHR - Job Status - Bulk API
- Edge Import - CHR - Job Status - Feed
- Edge Import - CHR - Position
- Edge Import - CHR - Position - Bulk API
- Edge Import - CHR - Position - Feed
- Edge Import - CHR - Position Employee Assignment
- Edge Import - CHR - Position Employee Assignment - Bulk API
- Edge Import - CHR - Position Employee Assignment - Feed
- Edge Import - CHR - Position Relationships
- Edge Import - CHR - Position Relationships - Bulk API
- Edge Import - CHR - Position Relationships - Feed
- Edge Import - CHR - Position Status
- Edge Import - CHR - Position Status - Bulk API
- Edge Import - CHR - Position Status - Feed
- Edge Import - CHR - Function
- Edge Import - CHR - Function - Bulk API
- Edge Import - CHR - Function - Feed
- Edge Import - CHR - Function Relationships
- Edge Import - CHR - Function Relationships - Bulk API
- Edge Import - CHR - Function Relationships - Feed
- Edge Import - CHR - Function Status
- Edge Import - CHR - Function Status - Bulk API
- Edge Import - CHR - Function Status - Feed
- Edge Import - CHR - Job Function Assignment
- Edge Import - CHR - Job Function Assignment - Feed
- Edge Import - CHR - Job Function Assignment - Bulk API

Note: None of the permissions above can be constrained.

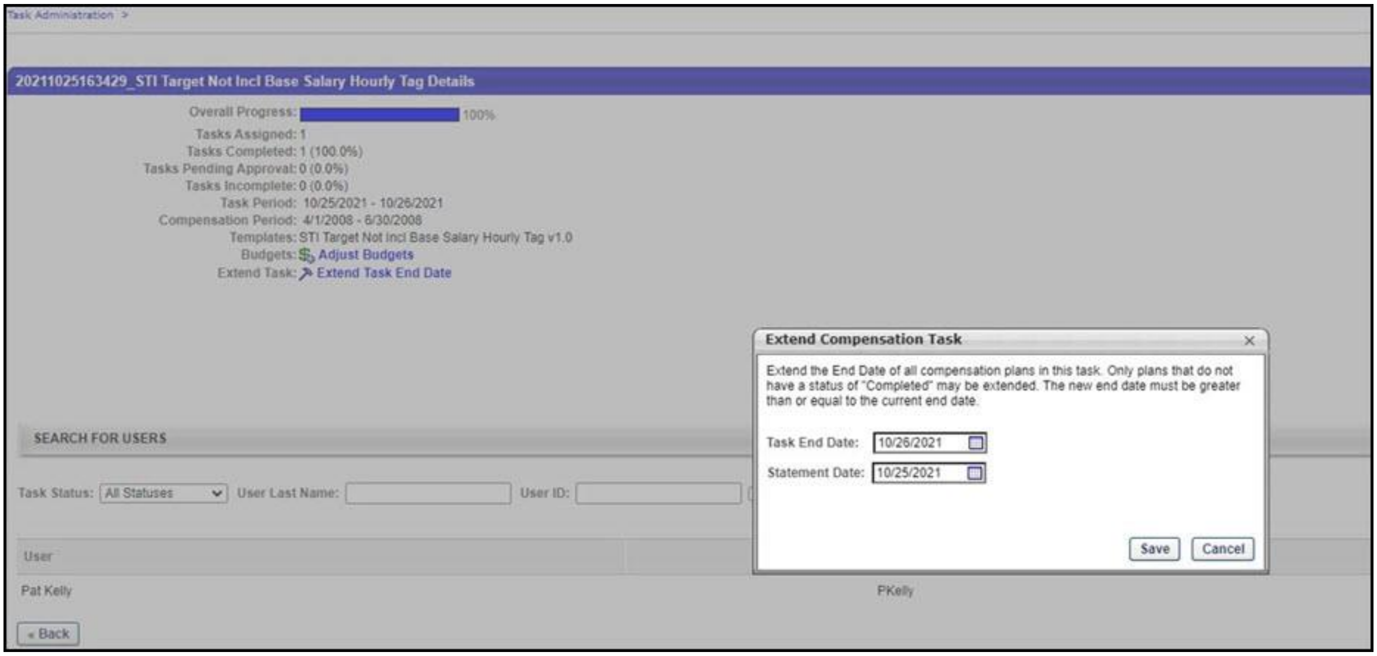
Cornerstone HR Enhancements

Extend Compensation Task End Dates - Cornerstone HR

Prior to this release, Cornerstone HR customers were able to extend Compensation Task End dates by contacting Global Customer Support (GCS).

With this release, if Effective Dating is enabled, administrators can manually extend Task End dates for In-Progress, Completed, and Expired tasks. Administrators can also extend the compensation statement availability date.

To extend task end dates, go to ADMIN > TOOLS > COMPENSATION MANAGEMENT > TASKS and select the View Details icon for the appropriate task. In the Extend Task field, click **Extend Task End Date** and select the appropriate dates.



Note: With the release of this enhancement, extending compensation task end dates applies to both newly created compensation tasks and to tasks created before the release.

Considerations

- When extending compensation task end dates, the status of the Compensation task does not change for tasks with Not Started, In Progress, or Complete status.
- When extending compensation task end dates for a task in Expired status, the task moves back to In Progress status.
- Extending compensation task end dates is also supported for inactive compensation tasks for all statuses.
- For compensation task end dates and compensation statement availability dates, it is not possible to define a new task end date sooner than the existing date.
- The ability to extend compensation task end dates is available for existing compensation tasks and compensation tasks created after the release.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Task Administration - Manage	Grants access to the Compensation Task Administration page, and grants ability to view and manage compensation planning and modeling tasks from the Compensation Task Administration page. Administrators can only view a compensation task if they have this permission and are also included in the Visibility settings for the compensation task. ***Note:*** *Administrators with the Compensation Task Administration permission can view and manage all compensation tasks and do not require this permission.* This permission cannot be constrained. This is an administrator permission.	Compensation - Administration
Compensation Task Administration	Grants ability to configure and assign compensation planning and modeling tasks to managers in the organization. This permission cannot be constrained. This is an administrator permission.	Compensation - Administration

Form Enhancements

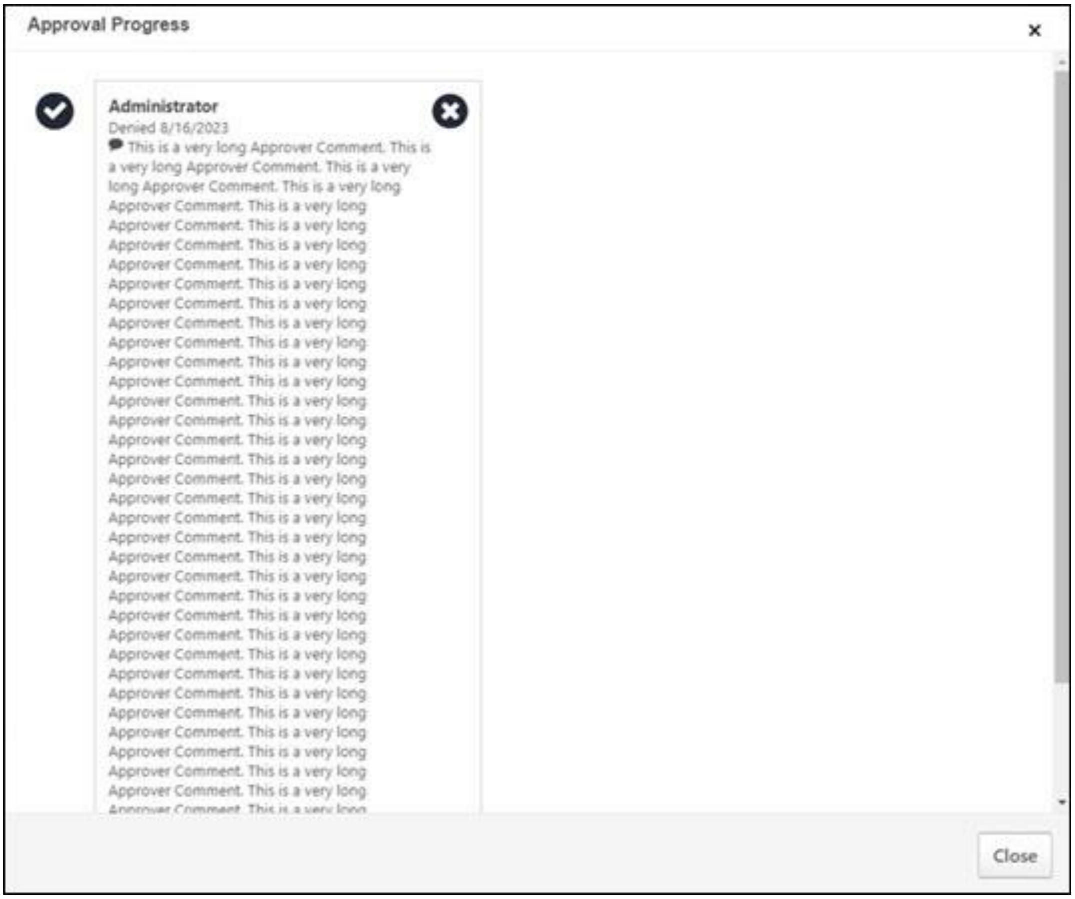
With this release, two new Forms enhancements are available:

- Character limit increase for Approver Comments
- User ID field now available for use with Form Configuration

Character Limit Increase for Approver Comments

Prior to this enhancement, the Approval Comments field had a character limit of 250 characters, which did not allow for all of the details needed for approval or rejection.

With this release, the Approval Comments field allows for up to 1500 characters, including spaces. This applies to the Approval Progress Overview page and the approval comments at the top of a Form page.

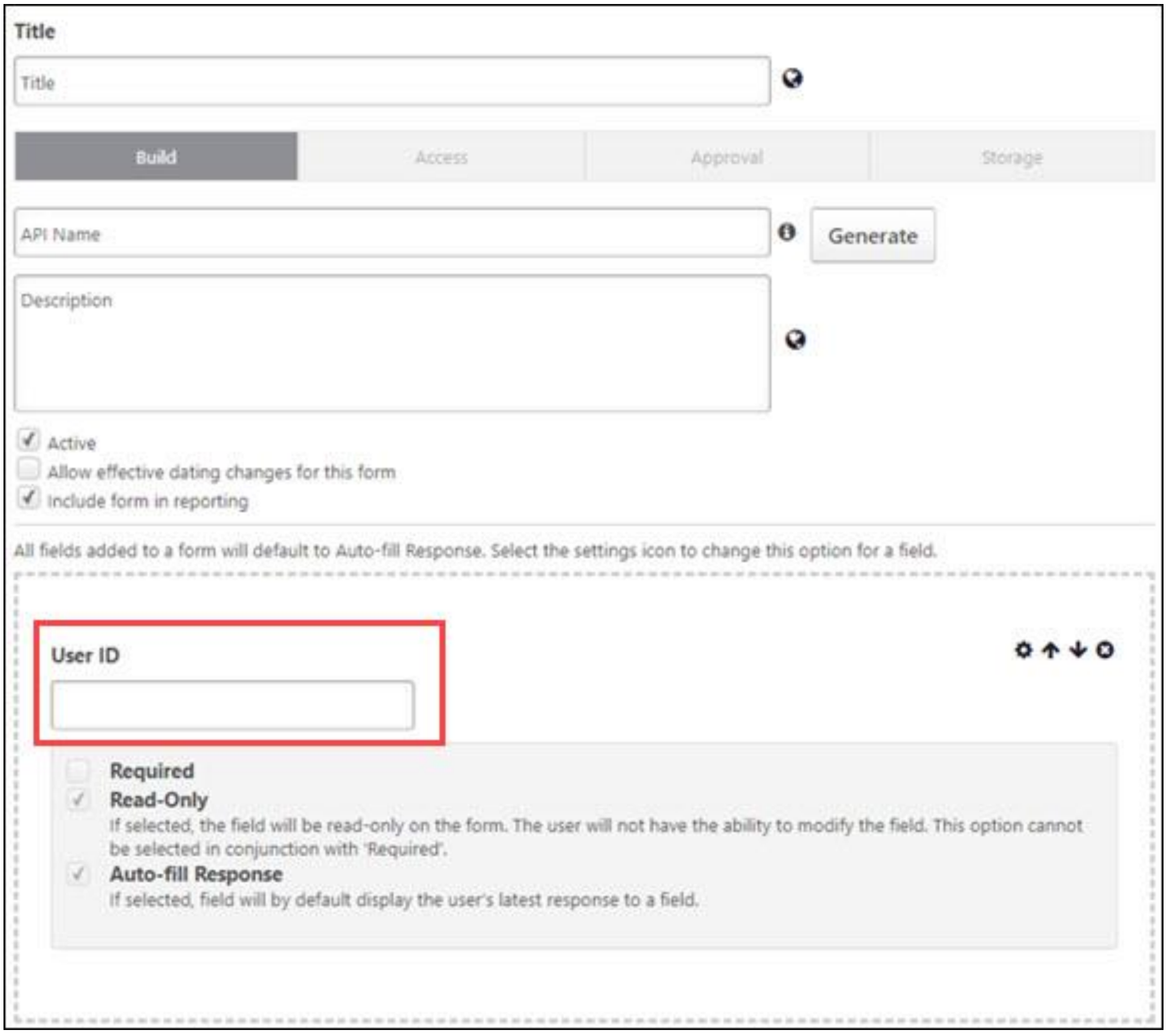


User ID field Available for Form Configuration

The User ID field is often used as a unique identifier for target users or custom-specific API calls that require this information.

With this enhancement, the User ID standard field is available for configuration in forms as a read-only field that cannot be edited or overwritten.

This field is available and reportable in Reporting 2.0.



Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Forms - Manage	Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission. ***Note:*** *This permission enables access to the Form Management functionality that is part of Cornerstone HR functionality and the Onboarding module. This permission*	Forms Management Administration

	does not grant access to the Training Forms Management functionality.	

Core/General

Capabilities Enhancements

Capability Category Improvements

Capability Category Improvements

With this enhancement, administrators have a faster, more effortless experience managing Capabilities with AI category detection, improved search, and **additional import functionality**. End users have a more apparent context of how skills are organized by seeing the tagged categories.

How Does this Enhancement Benefit My Organization?

These enhancements to Capability Categories make it easier for administrators to manage their Capability Library and give users greater visibility into the details about the skills in which they are interested.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants the ability to view an employee Skills Profile. Users with 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 the ability to create, edit, and copy capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Library - Manage	Grants the ability to create, edit, copy, delete, import, and approve capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration
Access Capabilities - Library Load	Grants access to load capabilities to the Capabilities Library via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Capabilities - User Profile Load	Grants access to load Skills Profile data via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

User Ratings	For end users, this permission grants the ability to perform ratings and view ratings. For administrators, this permission is required, along with the specific user rating administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

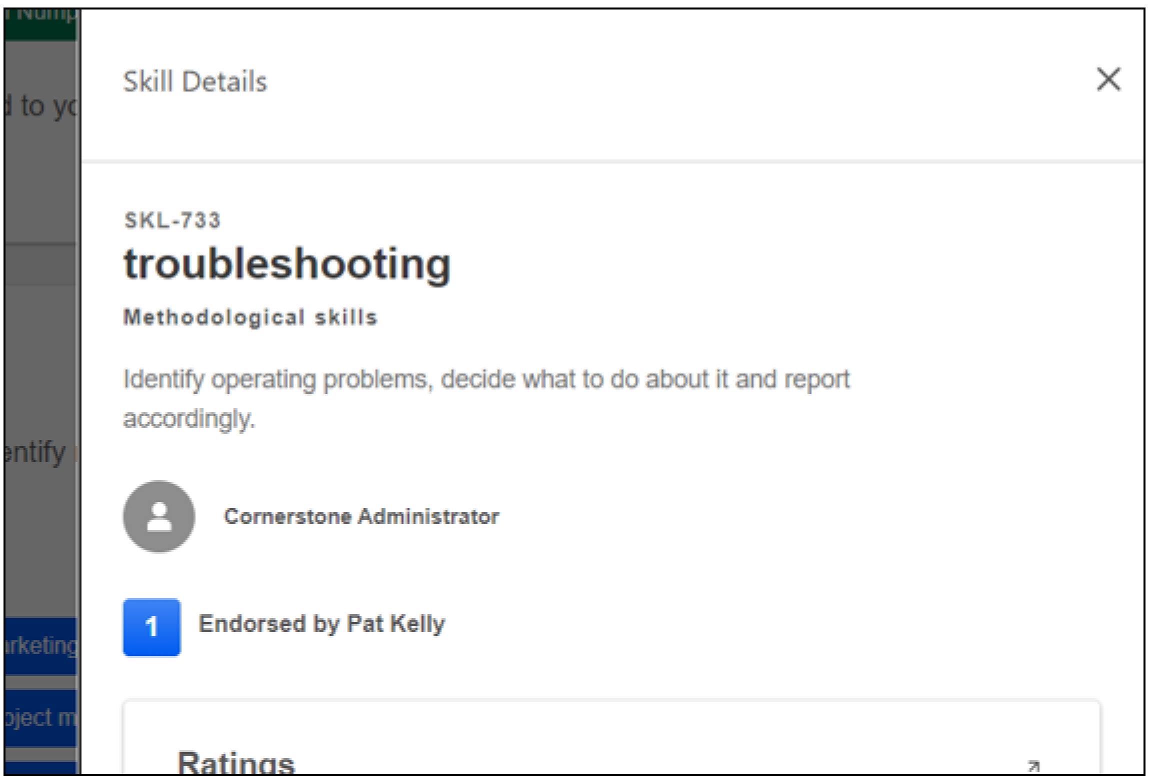
Skill Details - Display Category

When a user selects a Skill Tag, the skill's active categories are displayed under the skill title in the Skill Details flyout. Multiple categories are displayed alphabetically.

To view the Skill Details for a skill, navigate to the Skills Profile page. Then, select the skill name of a skill in your profile. *See Skills Profile.*

Permissions

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



Assign Category when Importing a Skill

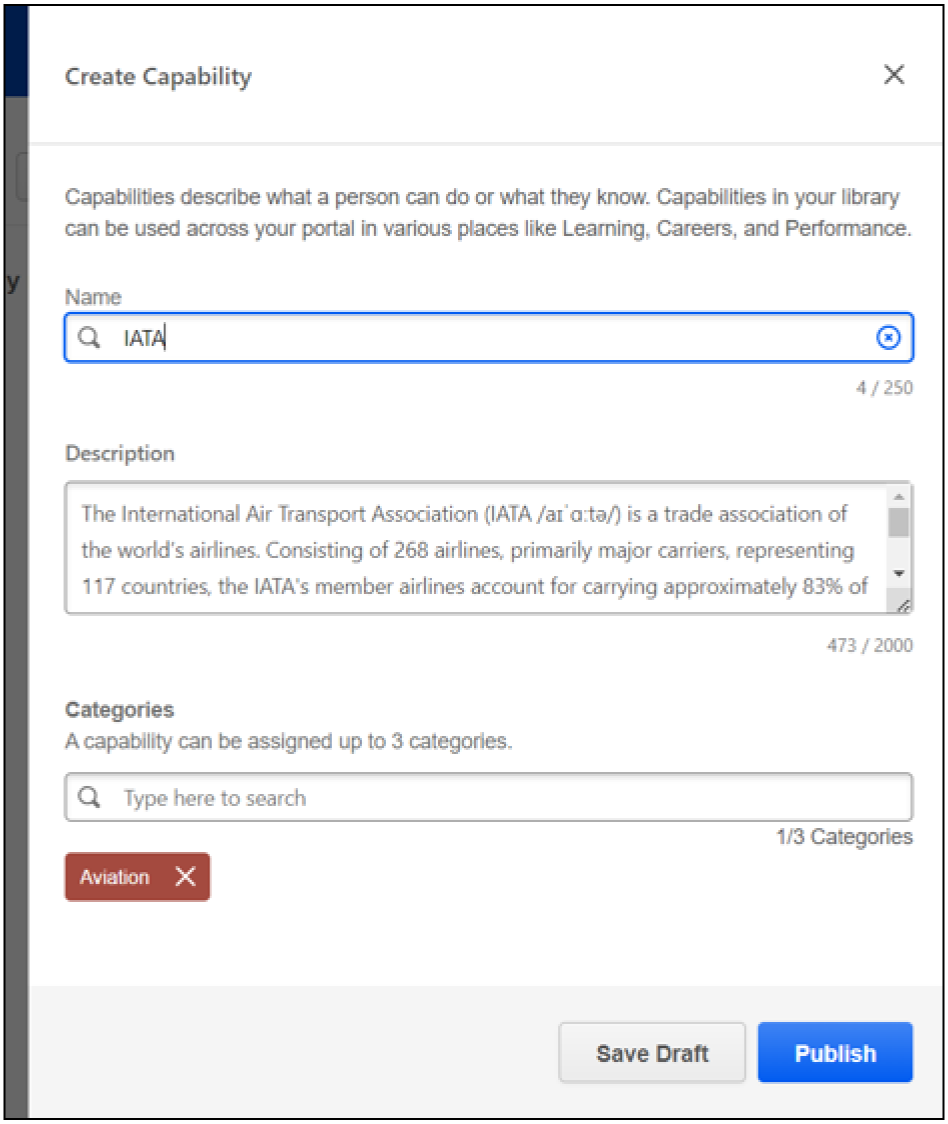
When an administrator imports a new skill from the Skills Graph taxonomy in the Capability Library, the associated category is automatically tagged on the skill. This only applies when importing skills from the Skills Graph taxonomy. If the Skills Graph returns more than three categories, only the first three in the collection are added to the skill.

The category is also added to the hierarchy if it does not exist in the hierarchy.

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

Permissions

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


Create Capability
Capabilities describe what a person can do or what they know. Capabilities in your library can be used across your portal in various places like Learning, Careers, and Performance.
Name
IATA
4 / 250
Description
The International Air Transport Association (IATA /aɪˈɑːtə/) is a trade association of the world's airlines. Consisting of 268 airlines, primarily major carriers, representing 117 countries, the IATA's member airlines account for carrying approximately 83% of
473 / 2000
Categories
A capability can be assigned up to 3 categories.
Type here to search
1/3 Categories
Aviation
Save Draft
Publish

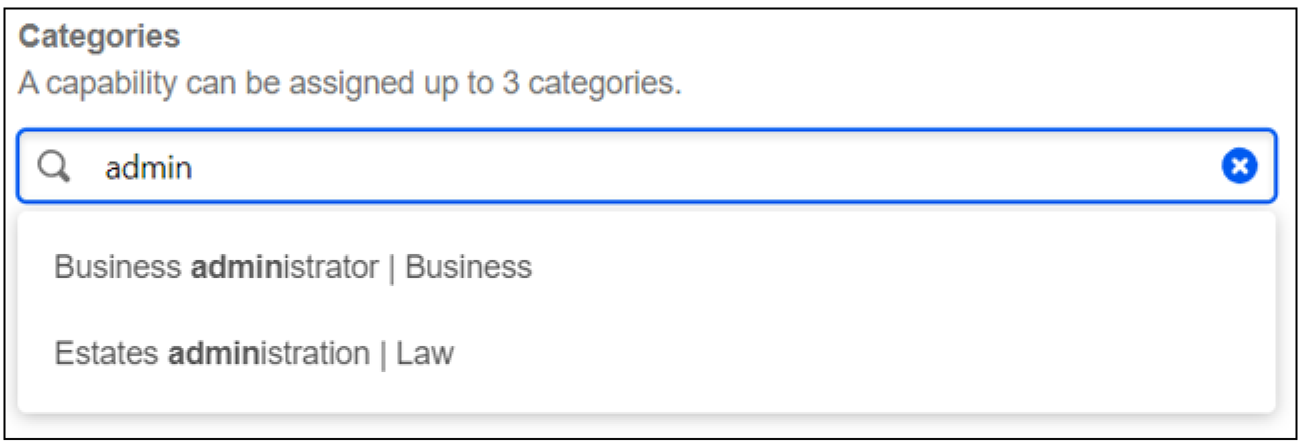
Improved Category Search

When assigning a category to a skill, administrators can now search for partial text in category names, highlighted in bold text. As the administrator types in the Categories field, the system displays any category that matches the search text anywhere in the category name.

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

Permissions

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



Critical Skills Experience Improvements

Critical Skills Experience Improvements

With this release, the Critical Skills section, located in the user Skills Profile, is enhanced with additional functionality to make it easier to capture ratings, make skills visible to a broader audience, and explain the goal of Critical Skills to the user.

The following enhancements have been made to the Critical Skills experience:

- Replaced text-based skill listing with interactive skills tags, making it easier for users to interact with the skill directly in the Critical Skills table
- Added a Bulk Rating process to rate proficiency on all of a user's Critical Skills at once
- Added an information icon to explain what the Critical Skills are and how the overall proficiency score is calculated
- Made Critical Skills viewable to Managers and Administrators

How Does this Enhancement Benefit My Organization?

Critical Skills make it easy for employees to understand the skills required for the Capability Models to which they belong. The Critical Skills experience is improved to make it easier for employees to understand and take action on their most essential skills.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Skills Profile - Critical Skills - View	Grants the ability to view the Critical Skills table for any user. This permission cannot be constrained. This is an administrator permission. Administrators must also have permission to access the user's Skills Profile.	Core Administration

The following existing permissions apply to this functionality:

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

	is required, along with the specific user rating administration permissions to edit rating scales or templates. This permission cannot be constrained.		

Explain Critical Skills

In the Critical Skills section header, an information icon is available for all users. When selected, text is displayed to the user to explain the Critical Skills and how the overall proficiency score is calculated.

To access the Skills Profile page, go to HOME > UNIVERSAL PROFILE. Then, click the Skills tab.

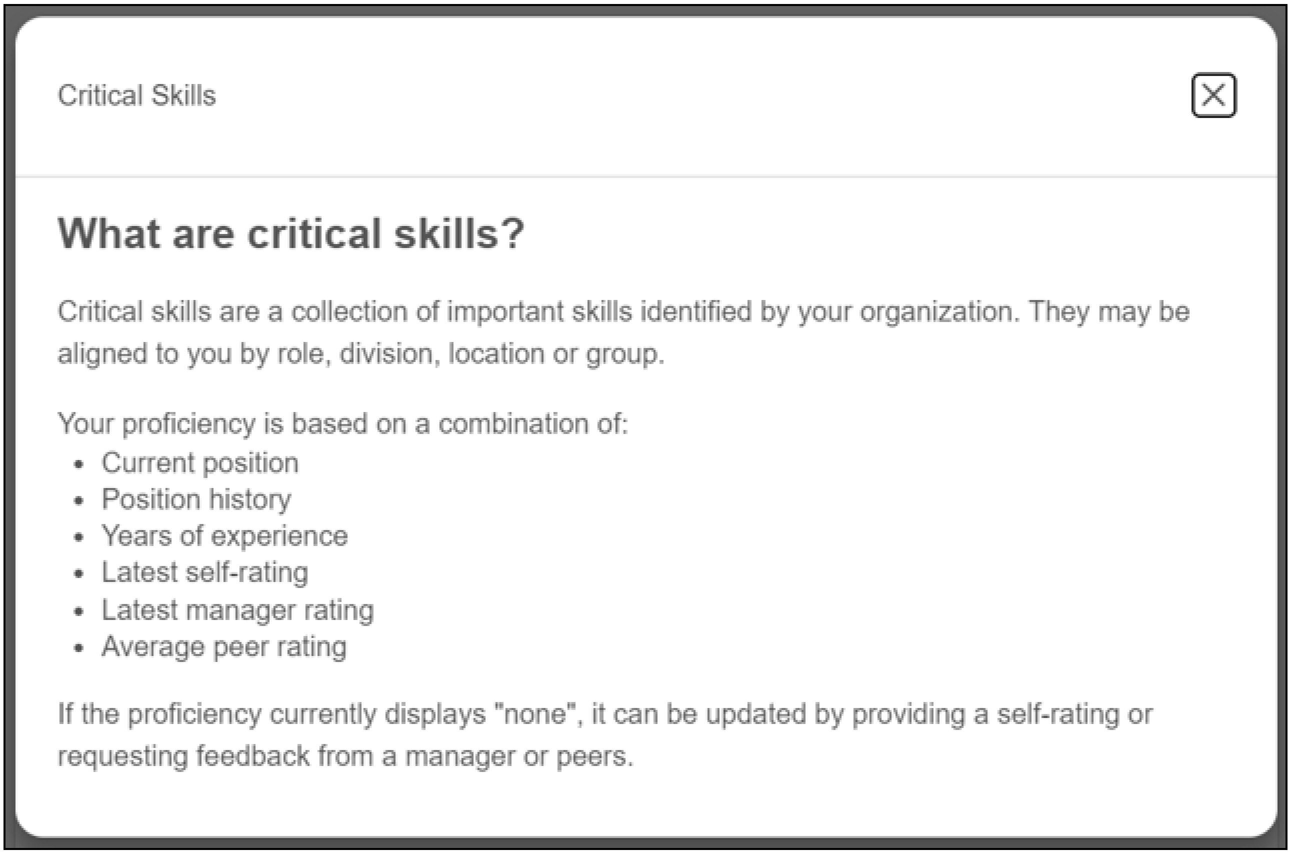
To access another user's Universal Profile - Bio page, select the user's photograph from any Universal Profile or Global Search page. You can access the user's Skills Profile page by clicking the Skills tab.

Permissions

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

Your Critical Skills ⓘ

Skill	Your Proficiency	Expected	Status
Jenkins •••	Intermediate	Intermediate	Expectations met
Mathematical Mod... •••	None	-	-
SQL •••	Intermediate	-	-
JavaScript •••	Expert	Intermediate	Above expectations
Networking •••	Beginner	Expert	Below expectations
DataBricks •••	None	Intermediate	-
Troubleshooting •••	None	-	-


Critical Skills
What are critical skills?
Critical skills are a collection of important skills identified by your organization. They may be aligned to you by role, division, location or group.
Your proficiency is based on a combination of:
• Current position
• Position history
• Years of experience
• Latest self-rating
• Latest manager rating
• Average peer rating
If the proficiency currently displays "none", it can be updated by providing a self-rating or requesting feedback from a manager or peers.

Critical Skills - Display Skill Tags

To provide better context to the user, the Critical Skills table now includes color-coded Skill Tags consistent with other sections of the Skills Profile. The color of the tag indicates the skills status, such as developing, declared, suggested, or hidden.

Users can select the skill tag to view the skill details. Users can take action on the skills with the action menu to the right of the skill name, such as Rate Proficiency, Rate Enjoyment, or Request Feedback.

If a critical skill name is too long to be displayed in the tag, the skill name is truncated. Users can hover over the skill name to view the full skill name.

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

Your Critical Skills

Skill	Your Proficiency	Expected	Status
Jenkins	Intermediate	Intermediate	Expectations met
Mathematical Mod...	None	-	-
SQL	Intermediate	-	-
JavaScript	Expert	Intermediate	Above expectations
Networking	Beginner	Expert	Below expectations
DataBricks	None	Intermediate	-
Troubleshooting	None	-	-

Critical Skills - Enable Bulk Rating

To facilitate capturing ratings for all Critical Skills, users can now interact with the action menu to quickly launch a bulk rating or request feedback from their peers. The bulk actions menu appears in the upper-right corner of the section.

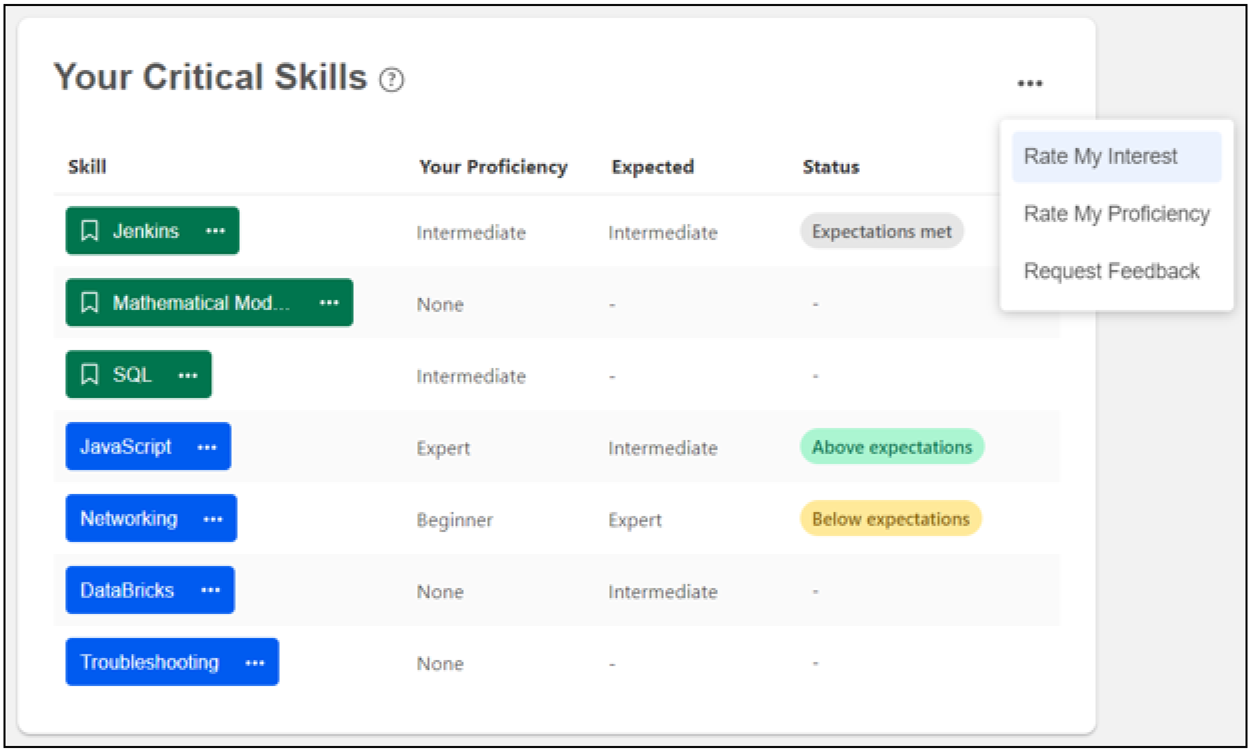
The rating options displayed will mirror those configured for the declared skills section.

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


Your Critical Skills
Skill
Your Proficiency
Expected
Status
Jenkins
Intermediate
Intermediate
Expectations met
Mathematical Mod...
None
-
-
SQL
Intermediate
-
-
JavaScript
Expert
Intermediate
Above expectations
Networking
Beginner
Expert
Below expectations
DataBricks
None
Intermediate
-
Troubleshooting
None
-
-
Rate My Interest
Rate My Proficiency
Request Feedback

Critical Skills - Expand Visibility

Previously, managers could view the Critical Skills section for their direct reports, but administrators could not view this section for other users. When viewing another user's Critical Skills, the section is renamed to Their Critical Skills, and the Proficiency column is renamed to Their Proficiency.

With this enhancement, administrators can access the Critical Skills section for other users via the “Skills Profile - Critical Skills - View” permission.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Skills Profile - Critical Skills - View	Grants the ability to view the Critical Skills table for any user. This permission cannot be constrained. This is an administrator permission. Administrators must also have permission to access the user's Skills Profile.	Core Administration

Critical Skills - Skills and Targets

Previously, the Critical Skills section did not display a skill if it did not have a defined proficiency target.

With this enhancement, the Critical Skills section displays all critical skills without a defined proficiency target. The Expected and Status columns display a dash for critical skills with no target.

The highest target and the corresponding status are displayed if a critical skill is in two models.

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

Your Critical Skills

Skill	Your Proficiency	Expected	Status
Jenkins	Intermediate	Intermediate	Expectations met
Mathematical Mod...	None	-	-
SQL	Intermediate	-	-
JavaScript	Expert	Intermediate	Above expectations
Networking	Beginner	Expert	Below expectations
DataBricks	None	Intermediate	-
Troubleshooting	None	-	-

People Matrix Qualification Mode - General Availability

People Matrix Qualification Mode - General Availability

Qualification Mode extends the ability of the People Matrix to work with Capability Models and enables managers to track training, in addition to skills, from within the People Matrix.

Qualification Mode includes the following key features:

- Use Capability Models as templates to create People Matrices pre-populated with a population's most important skills
- Templates that allow comparisons between individuals from organizational units with individualized proficiency targets
- Track the transcript completion status of select training in custom matrices built from scratch (templates not yet supported)
- Links in the matrix to assign training and access transcript

How Does this Enhancement Benefit My Organization?

People Matrix Qualification Mode speeds up identifying users with the right skills and who have taken the required training for roles, projects, gigs, and more and places them within a single visualization accessible by managers or administrators.

Considerations

- The ability to track training is only possible for matrices created from scratch. It is not available for matrices created from a template. This ability will be added in a future release.
- When adding training to a matrix, the matrix creator can only view and add training if they are within the training's availability.
- In the people matrix, the training status is simplified to the following four existing statuses: Completed, Not Started, Not Assigned, and N/A.
- When training is added to the matrix, it is assumed that the target is for users to complete the training. If the training is not complete, the training is considered off-target.
- When using a template, the matrix cannot be modified except for the name attributes and default rating source.

Frequently Asked Questions - Templates

What is a template, and which ones can I use?

The templates are another name for the Capability Models. Any capability model in the capability model library may be used, but your constraints will limit which users are included in the matrix.

Can the matrices I create be shared as models?

No. Currently, only capability models in the capability model library may be shared as templates. Please note that this is usually an administrator-only function.

I cannot edit the matrix I created using a template. Why is this?

Matrices created using a template are read-only; you may not add or remove skills or employees. If the criteria of a model need to be changed, please contact your system administrator.

I created a matrix using a template. How do I add training to it?

Currently, capability models do not support training; this functionality will be added in a future release. For now, you may only track training in matrices created ad-hoc.

I created a matrix using a template, but I do not see any people in it. Why is this?

Which employees you can view in a matrix depends on your constraints and the audience defined in the capability model. If your constraints do not align with the audience defined in the model, you may not be able to view any people.

Can I create a matrix using multiple templates?

No. Only one capability model may be added to a matrix for now.

I created a matrix from a template with multiple positions. Only some of the OUs have summary metrics when I access the matrix. Why?

To view metrics that enable comparison between OUs, two criteria must be met:

1. The OU must not exceed 1,000 employees. If the OU exceeds 1,000 employees, drilling into the OU will display metrics for the top 1,000 employees. An alert is displayed when this occurs.
2. The OU must have target proficiency ratings defined. If the OU does not have targets defined, the ratings will be color-coded from blue to gray. Targets must be defined for the OU to have a summary.

If a matrix exceeds 1,000 users, no summary metrics are provided. When viewing a matrix for an OU that exceeds 1,000 users, the first 1,000 users are displayed, and summary metrics are provided for that set of employees.

Frequently Asked Questions - Training

How do I enable the Training tab in the People Matrix?

The ability to track training is automatically enabled for organizations using Learning.

How do I disable the Training tab in the People Matrix?

Submit a request to Global Customer Support to disable the People Matrix - Qualification Mode. Disabling Qualification Mode will remove the Training tab.

I want to create a matrix that only tracks training. Can I do that?

Yes, there is no requirement to track capabilities and training together.

How do I add training to a capability model?

Currently, adding training requirements to a capability mode is not possible. This will be added in a future release.

What training types can I add to a people matrix?

Online Classes, Curriculum, Videos, Tests, Materials

While searching for training, I cannot see all the training I want to add to the matrix.

The matrix creator can only view and add training based on their availability restrictions.

Implementation

The ability to create a People Matrix from a capability model is automatically enabled for all customers.

The ability to track training within a People Matrix is automatically enabled for all organizations using Learning. This feature is optional and may be disabled by submitting a request to Global Customer Support. In a future release, this functionality will be controlled by a self-service preference.

Permissions

The following existing permissions apply to this functionality:

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

Create People Matrix - Use a Template

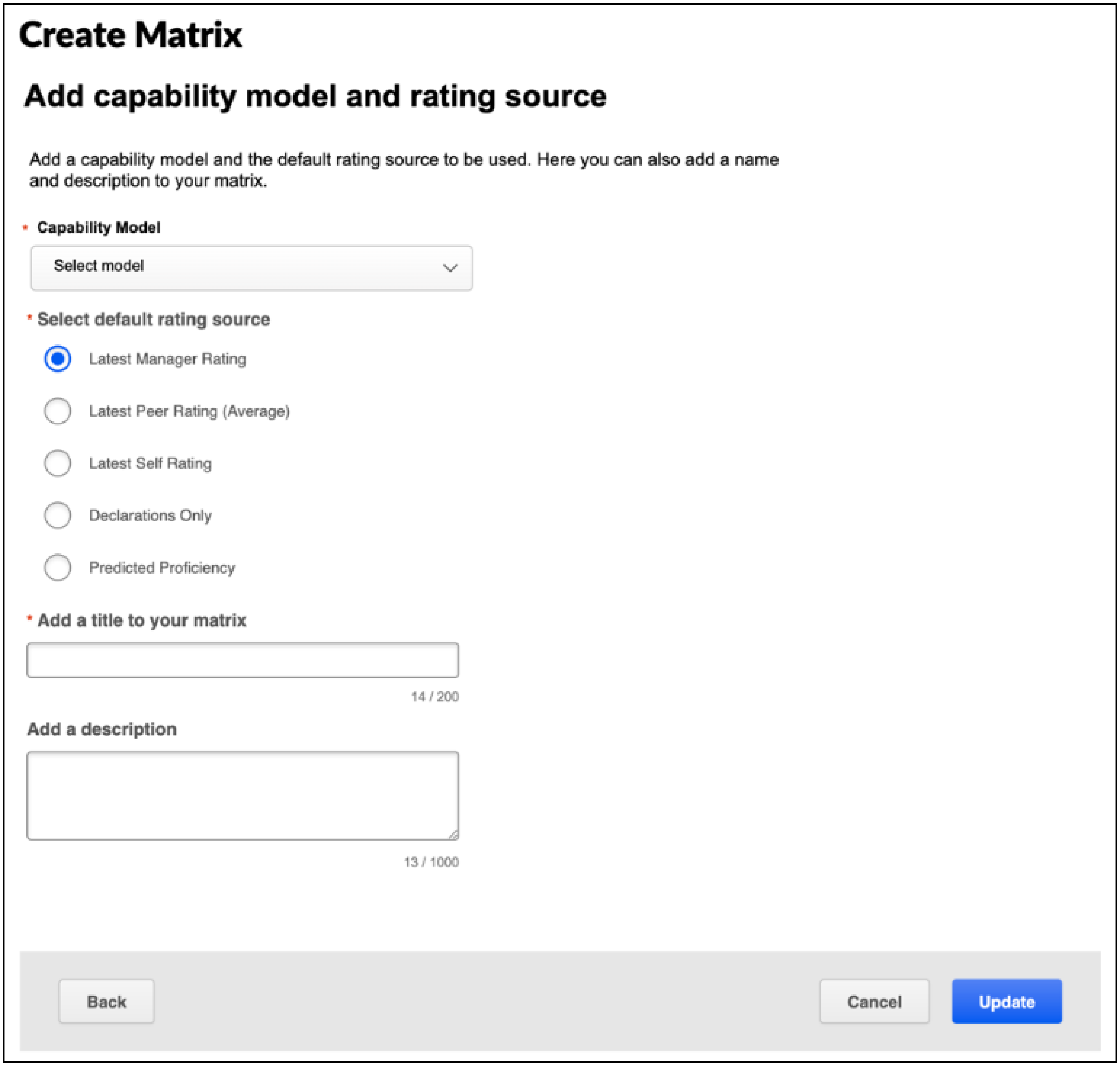
Capability Models define the skills employees should have to succeed in their roles, and the ideal proficiency level they should attain.

With this release, administrators and managers can create a People Matrix using a Capability Model as a template. This pre-populates the people matrix with the settings from the capability model, including the appropriate set of users, the relevant skills, and the corresponding ratings.

To create a people matrix from a capability model, go to SKILLS > PEOPLE MATRIX. Select the **GET STARTED** or **CREATE NEW** button. Select **Use a template**.

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



Capability Model

From the drop-down, select the capability model to use as the template for the people matrix. This drop-down includes all active models sorted alphabetically.

Select default rating source

Select which rating source should be used to display ratings in the matrix. The following options are available:

1. Latest Manager Rating
2. Latest Peer Rating

3. Latest Self Rating
4. Declarations Only
5. 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 their skill level that can be inferred from their years of experience in the role. If no value is displayed, it may mean there is no rating history for the skill, or the skill is not generally associated with the role. If a rating is added, a score will be computed and displayed.

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.

Add a description

Enter a description to explain the purpose of the matrix, up to 1,000 characters.

Save/Update

After configuring the matrix, select the Save button. The matrix is populated using the settings defined in the selected competency model. You are unable to modify the users or skills displayed in the matrix.

The first 1000 users in the competency model availability are included in the matrix.

- If the model has no defined availability, the first 1000 users in the viewer's constraints are included.
- If the model has no defined availability and the user has no constraints, the first 1000 users in the organization are included.

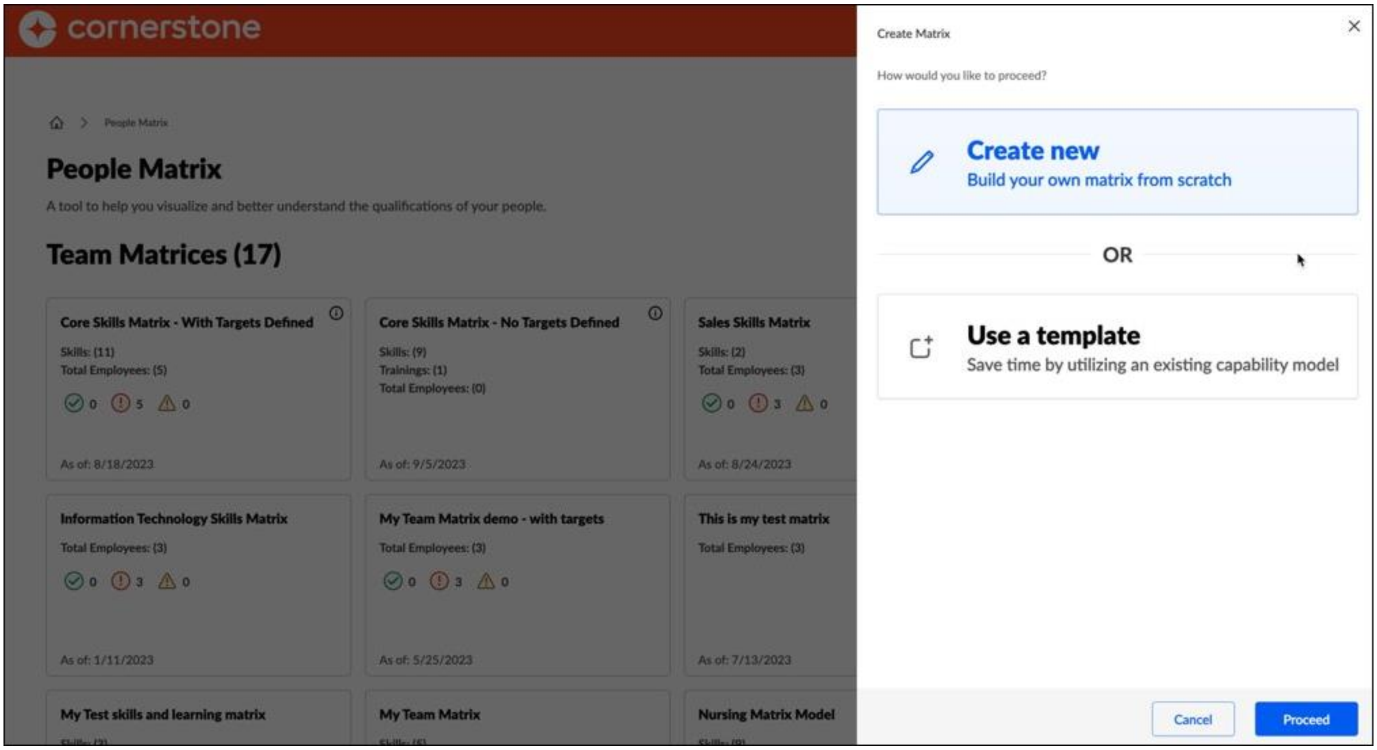
Create People Matrix - New Option

When creating a people matrix, administrators and managers can use a Capability Model as a template. This pre-populates the people matrix with the settings from the capability model, including the appropriate set of users, the relevant skills, and the corresponding ratings.

To create a people matrix from a capability model, go to SKILLS > PEOPLE MATRIX. Select the **GET STARTED** or **CREATE NEW** button.

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


cornerstone
People Matrix
People Matrix
A tool to help you visualize and better understand the qualifications of your people.
Team Matrices (17)
Core Skills Matrix - With Targets Defined
Skills: (11)
Total Employees: (5)
0 5 0
As of: 8/18/2023
Core Skills Matrix - No Targets Defined
Skills: (9)
Trainings: (1)
Total Employees: (0)
As of: 9/5/2023
Sales Skills Matrix
Skills: (2)
Total Employees: (3)
0 3 0
As of: 8/24/2023
Information Technology Skills Matrix
Total Employees: (3)
0 3 0
As of: 1/11/2023
My Team Matrix demo - with targets
Total Employees: (3)
0 3 0
As of: 5/25/2023
This is my test matrix
Total Employees: (3)
As of: 7/13/2023
My Test skills and learning matrix
My Team Matrix
Nursing Matrix Model
Create Matrix
How would you like to proceed?
Create new
Build your own matrix from scratch
OR
Use a template
Save time by utilizing an existing capability model
Cancel
Proceed

People Matrices from Capability Models with Multiple OUs

A new summary view is available for models containing multiple organizational units (OUs) to compare OUs with unique proficiency targets. Multiple OU types may be used in a matrix. The summary view enables viewers to compare target attainment across OUs.

To create a people matrix from a capability model, go to SKILLS > PEOPLE MATRIX. Select the **GET STARTED** or **CREATE NEW** button. Select **Use a template**.

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
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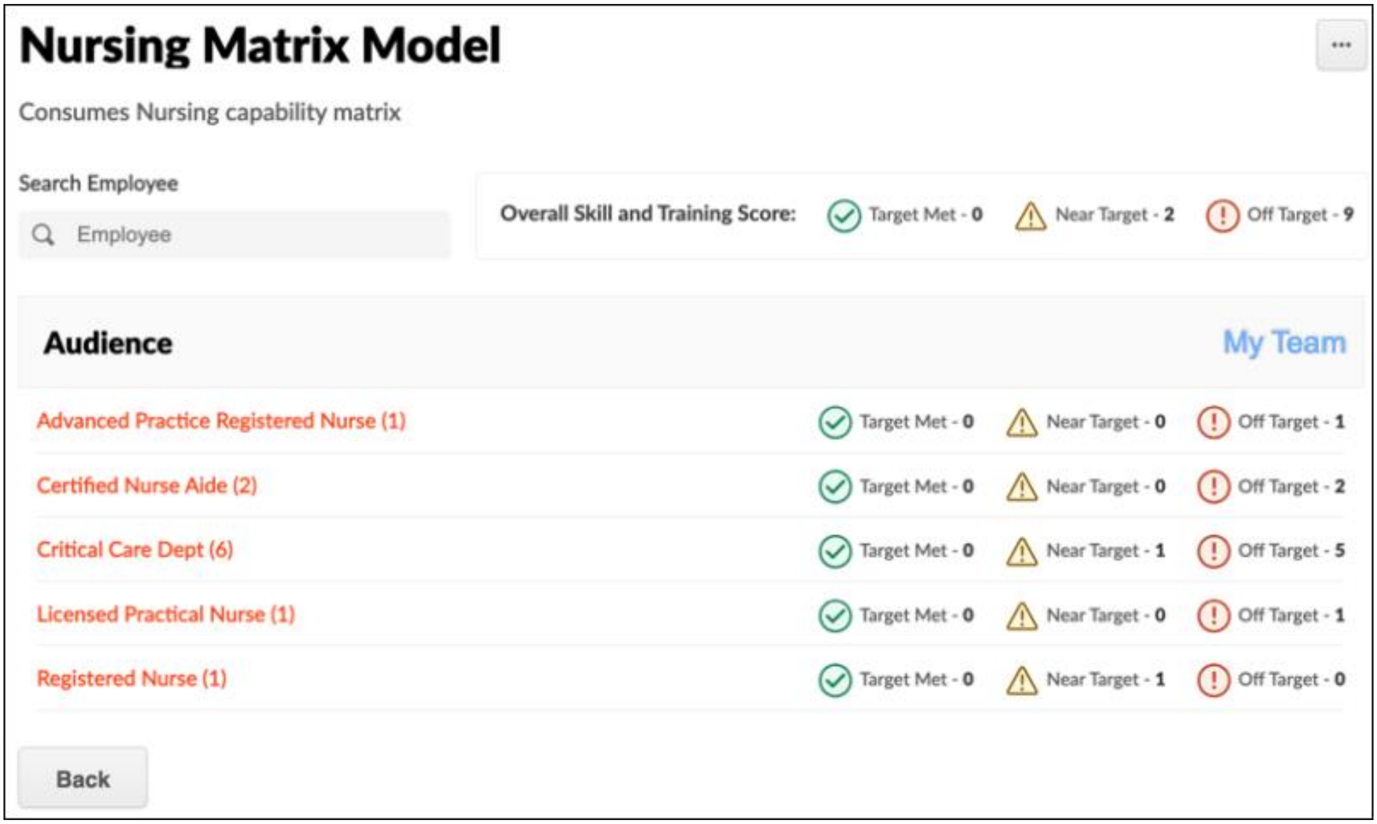
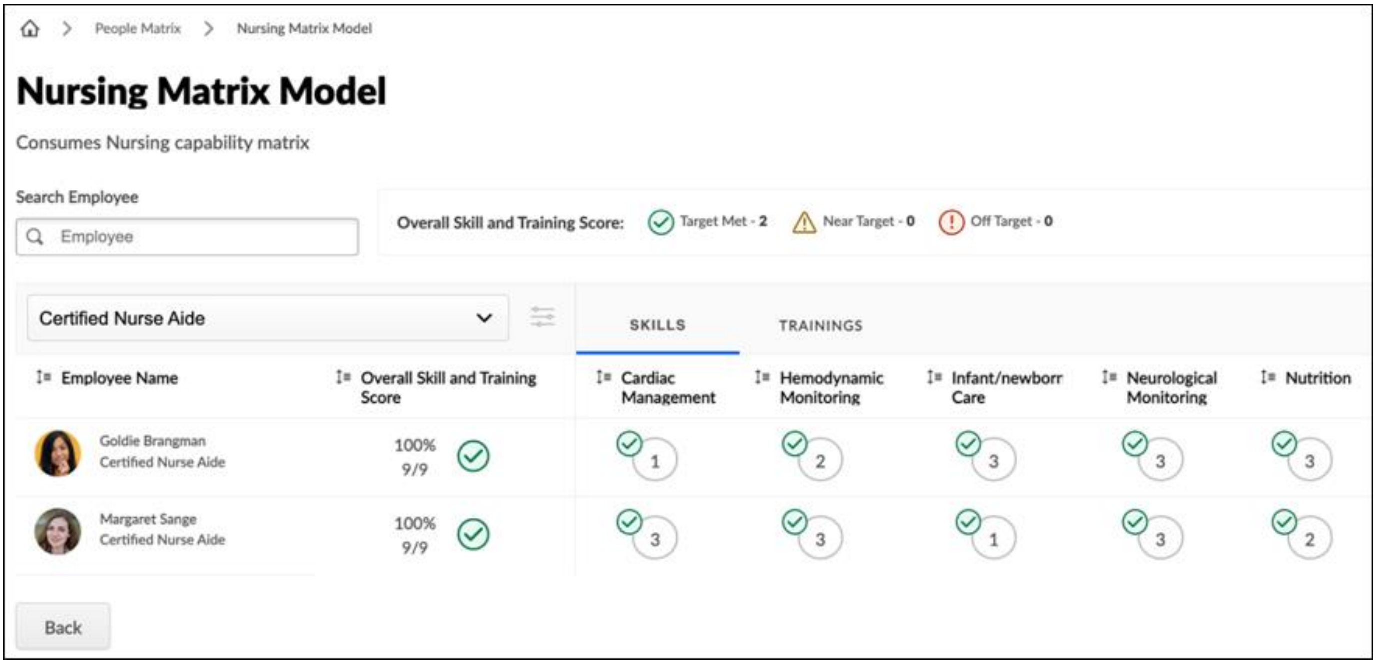


The Summary View displays each OU in the competency model along with target achievement metrics for the first 1,000 users in the OU. If the matrix includes over 1,000 users, the achievement metrics are not displayed when the matrix is first accessed. When this occurs, a message indicates that the matrix row limit is exceeded. **Note:** If the matrix includes over 1,000 users, the Export option is unavailable on the Summary View.

Managers can select the My Team link to view only their direct subordinates. This option is only available if the viewer has subordinates. The My Team view includes overall metrics for subordinates based on the highest skill target. When calculating if users are on target, the system considers the highest target within the capability model that applies to the user.

Matrix viewers can select an OU to view the details of individuals within it, quickly identifying which employees are most qualified for their roles. If the selected OU includes over 1,000 users, only the first 1,000 users are displayed in the matrix. When this occurs, a message indicates that the matrix row limit is exceeded. This message displays each time the matrix is accessed.



The OU drop-down enables viewers to navigate between OUs quickly. The following options are also available in the drop-down menu:

- Summary - Viewers can select this option to return to the Summary view.
- My Team - This option is only available if the viewer has subordinates. Managers can select this option to view only their direct subordinates.

If the selected OU has multiple levels in the hierarchy, viewers can select the Filter icon to the right of the OU drop-down to select specific OUs within the OU structure. The Filter option is unavailable if the capability model is not configured to include subordinate OUs.

When a matrix from a capability model is exported, the exported file includes an Audience OU field to indicate the OU associated with each user and their data. A user may be included in multiple OUs.

Track Training in People Matrix

When Qualification Mode is enabled for People Matrices, managers can add the critical training necessary to succeed in the team and track the team's progress for this training in the people matrix.

To create a people matrix with training included, go to SKILLS > PEOPLE MATRIX. Select the **GET STARTED** or **CREATE NEW** button. From the flyout, select the **CREATE NEW** button.

Note: Training cannot be added when creating a people matrix from a template.

Permissions

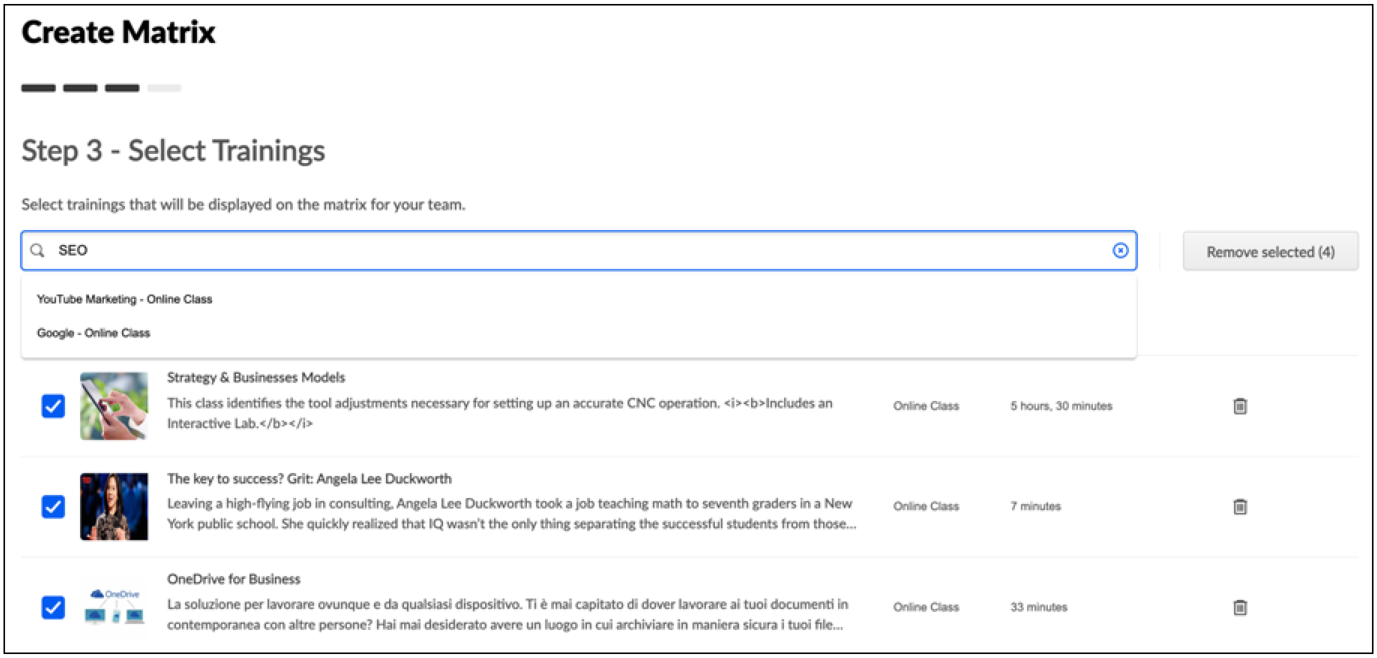
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available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

Select Trainings

A Select Trainings step is available when Qualification Mode is enabled for People Matrices. This step is optional.

Select any training that should be tracked in the people matrix. The selected training will be displayed in the people matrix along with each person's training status. This enables managers to easily track each team member's status regarding the critical training.

Managers can only search for and select training if the manager is within the availability of the training.



People Matrix - Trainings Tab

When training is added to a people matrix, the training is displayed on the Trainings tab within the matrix. Matrix viewers can select the Trainings and Skills tabs to view the other tab.

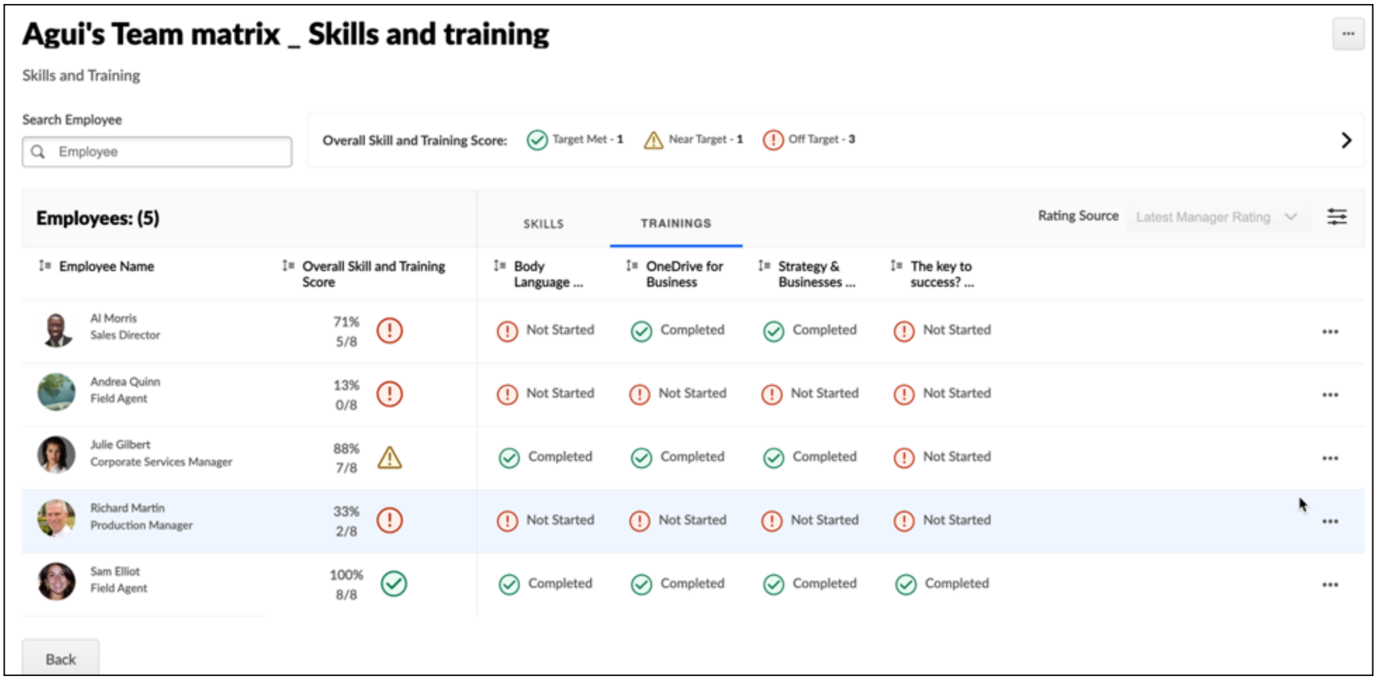
When viewing the Trainings tab, the user's training status is displayed for each training. When training is added to the matrix, it is assumed that the target is for users to complete the training. If the training is not complete, the training is considered off-target. The training status is simplified to the following four statuses: Completed, Not Started, Not Assigned, and N/A.

The Overall Skill and Training Score displays each user's cumulative score, including their skill assessments and training completion.

If the user has not been assigned the training, an Assign link is displayed in the corresponding column for the user. Managers can select this link to assign the training to the user.

Managers can hover over the training status for a particular user to open the Learning Details page for the user's training.

Managers can select the menu icon for a user to access the user's Skills Profile or Transcript.



People Matrix - Trainings Tab - Filters

When the Trainings tab is selected, the following options are available in the Filters flyout:

- Trainings - From the drop-down, select a specific training title included in the matrix. Choosing a training will display only the selected training in the matrix.
- Status - This option is only available if a specific training is selected from the Trainings drop-down menu. Select a radio button for a status to view only users who are in the selected training status for the selected training.

People Matrix - Export

When the people matrix is exported, any training added to the matrix is included in the export, including Training Title, Training Type, and Training Status.

Skills Quick Start Wizard

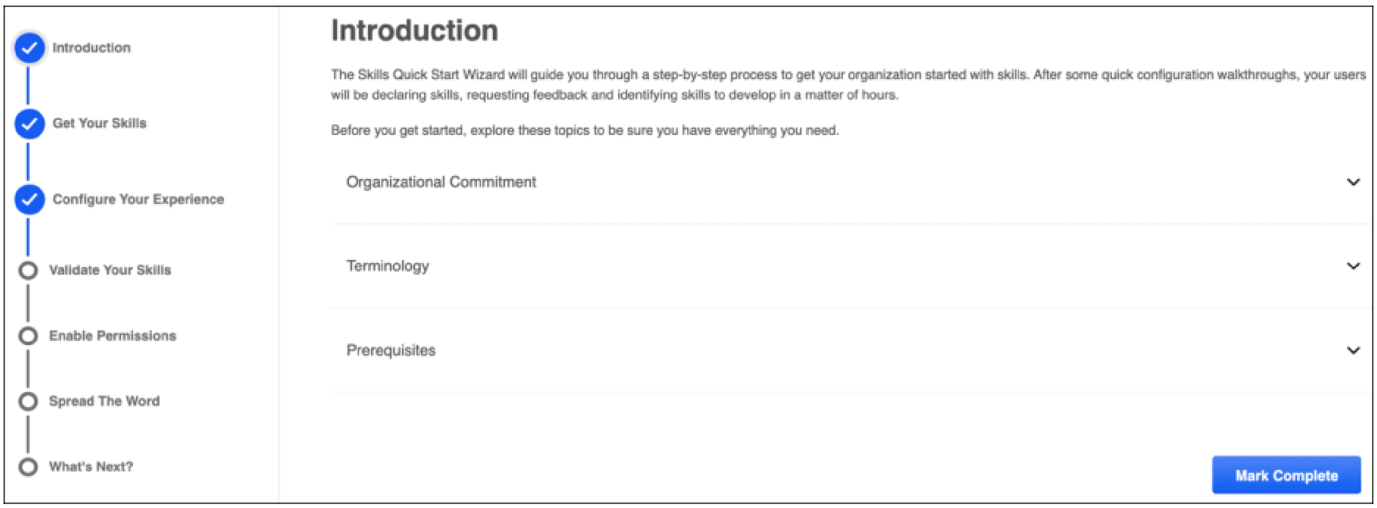
The Skills Quick Start Wizard makes it easy for administrators to start with Skills in Cornerstone CSX. With this release, the Skills Quick Start Wizard is improved to provide a better administrator onboarding experience by facilitating step-by-step navigation and focusing on the most critical and often confusing configuration tasks. The Skills Library Builder UI has also received an updated look.

The following features are included:

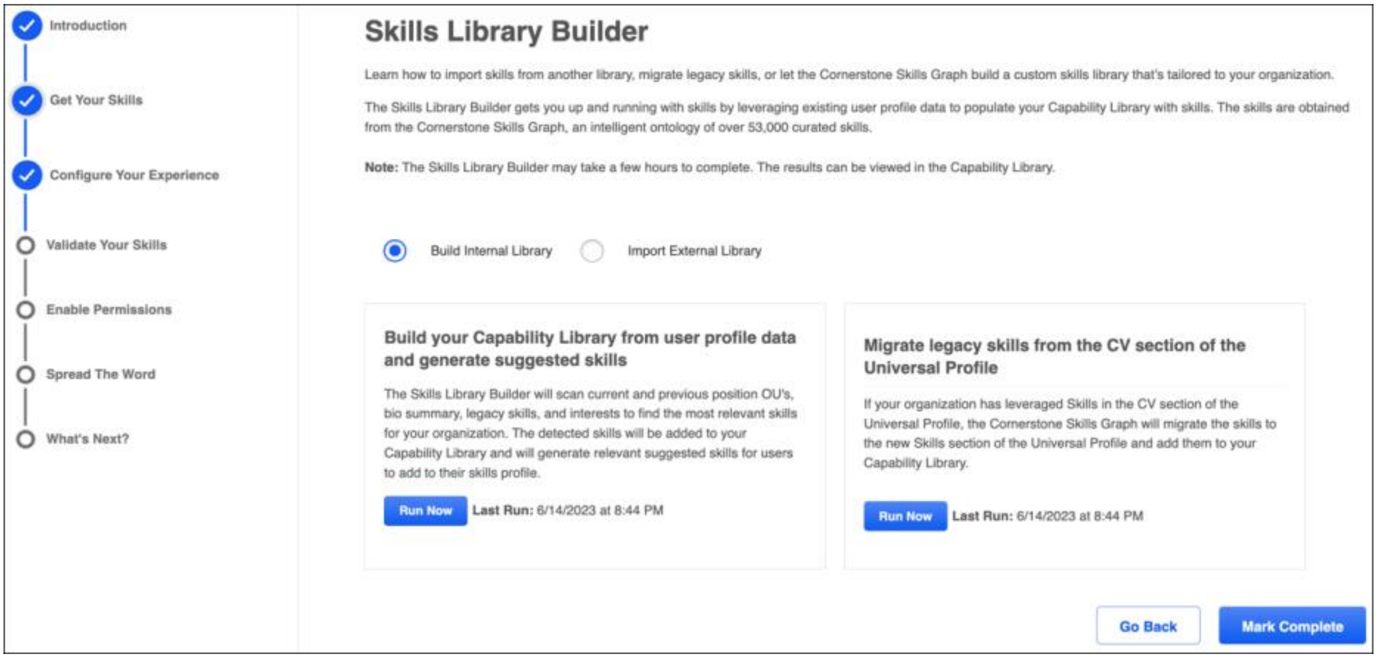
- Step-by-step guidance for administrators to quickly get started with skill configuration and deployment
- Links to valuable resources and capability administration tools
- Detailed text that explains concepts and best practices

To access the Skills Quick Start Wizard, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > SKILLS QUICK START WIZARD.

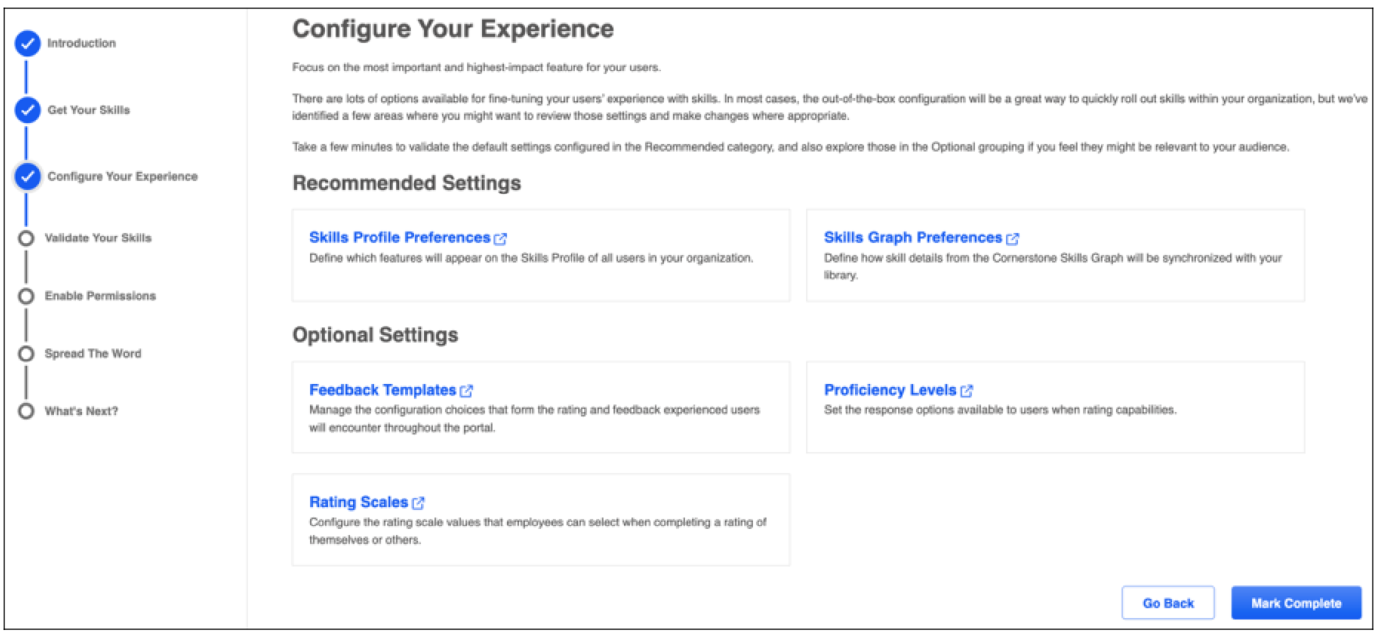
Introduction



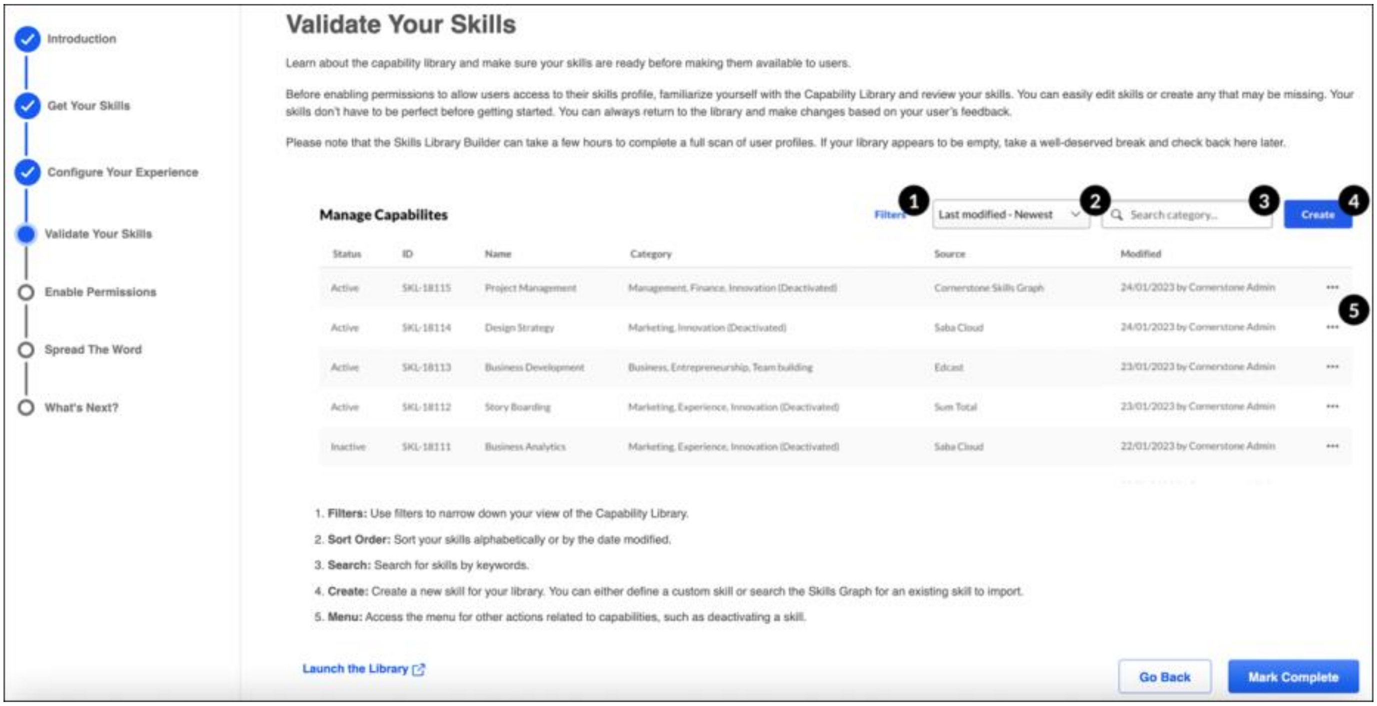
Get Your Skills



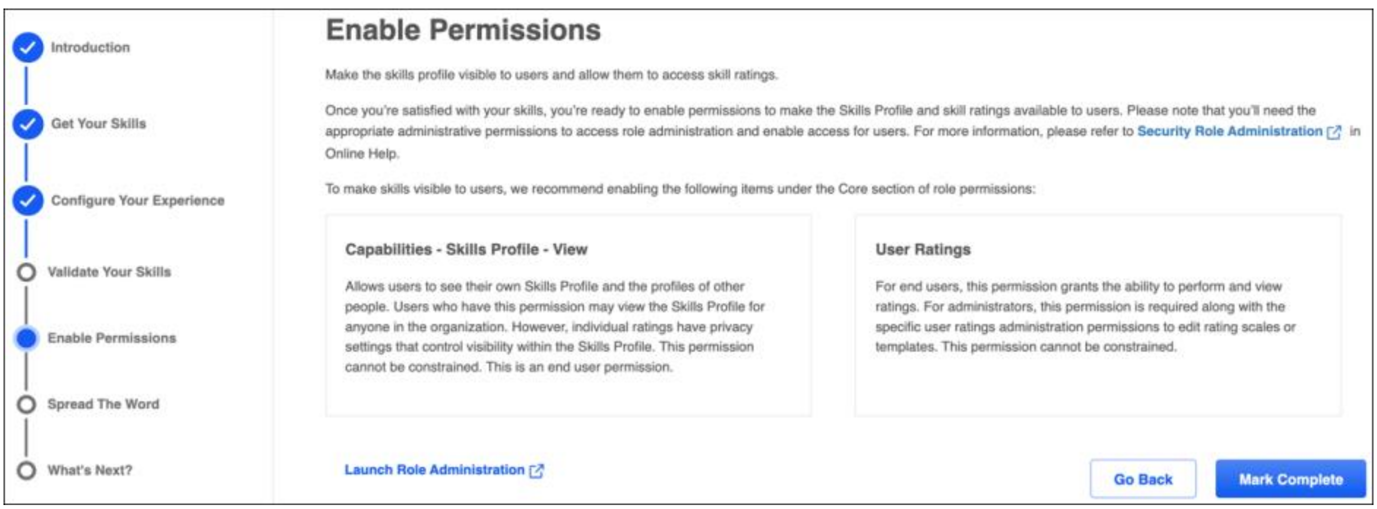
Configure Your Experience



Validate Your Skills

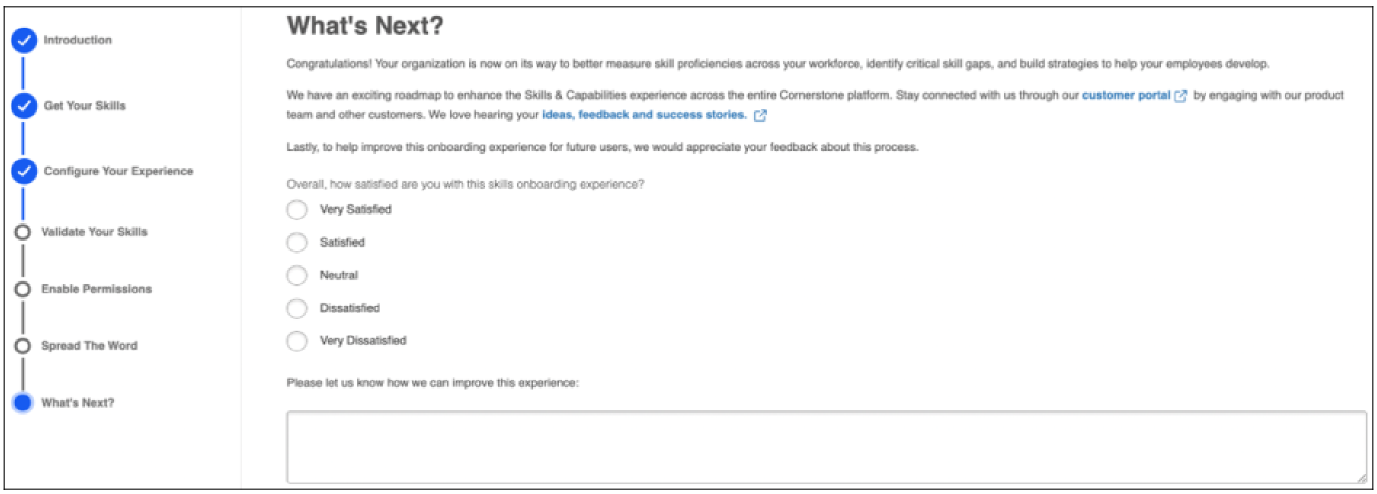


Enable Permissions

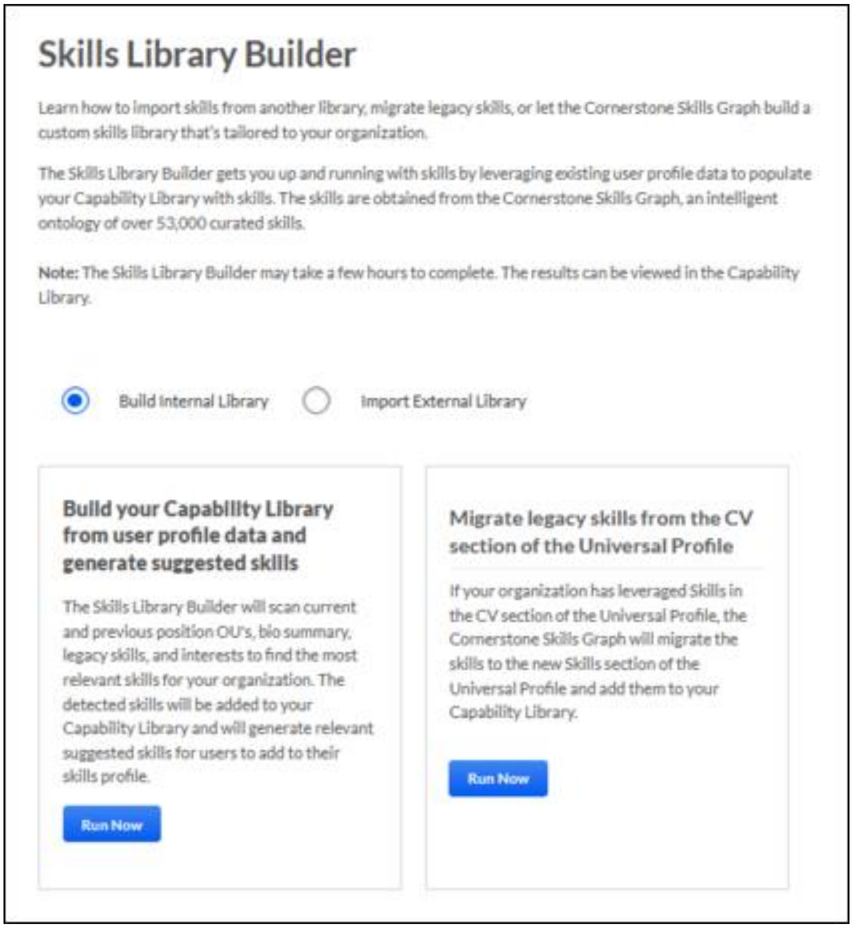


Spread The Word

What's next?



Skills Library Builder UI Update



How Does this Enhancement Benefit My Organization?

An enhanced Skills Quick Start Wizard makes it easier for organizations to adopt a skills strategy with improved explanation text, greater readability and accessibility in the user interface, and links to helpful external resources.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Quick Start Wizard - Manage	Grants access to the Skills Quick Start Wizard administrator experience, which helps administrators configure and deploy skills within their organization. This permission cannot be constrained. This is an administrator permission.	Core Administration

Tracking Your Critical Skills Progress

Tracking Your Critical Skills Progress

Without a structured skill tracking system, organizations struggle to identify skill gaps, leading to inefficient resource allocation, project delays, and operational setbacks. Additionally, the absence of personalized learning paths hampers employees' professional growth.

This feature offers a robust tracking system for the proficiency of an employee’s critical skills over time, which helps employees in their professional journey, facilitates manager evaluation and coaching, and links employees to opportunities within the organization.

How Does this Enhancement Benefit My Organization?

This functionality enables managers and employees to visualize skill progress over time. This helps to facilitate manager-employee conversations about skilling efforts, inform performance and development evaluations, and clearly show areas of improvement and opportunities for growth.

Considerations

With this release, six months of data is displayed in the flyout, and this time frame cannot be changed.

Frequently Asked Questions (FAQs)

How do I access the Track Your Critical Skills Progress page?

When enabled, a heartbeat icon is available in the Your Critical Skills section of your Skills Profile.

Is there a preference option to turn this feature on or off?

Yes, administrators can turn this feature on or off via Skills Profile Preferences.

How many views are available for tracking your critical skills progress?

Currently, there are two views available, line graph and tabular format.

Does the Track Your Critical Skills Progress page show any critical skills by default?

Yes, the top five critical skills are displayed by default.

Which view is shown by default?

The line graph is shown by default.

What is the duration of data displayed in the graph?

Currently, six months of data is displayed. This cannot be changed.

Can we change the rating labels shown in the line graph?

The rating labels displayed in the line graph are configured in the preference settings for Proficiency Levels.

Implementation

This functionality is automatically enabled for all organizations. Administrators may choose to disable this feature via Skills Profile Preferences.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Capabilities - Skills Profile - View	Grants the ability to view an employee Skills Profile. Users with 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 the ability to create and edit expertise levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Ratings	For end users, this permission grants the ability to perform ratings and view ratings. For administrators, this permission is required, along with the specific user rating administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Skills Profile Preferences - Show Progress Tracking in Critical Skills Section

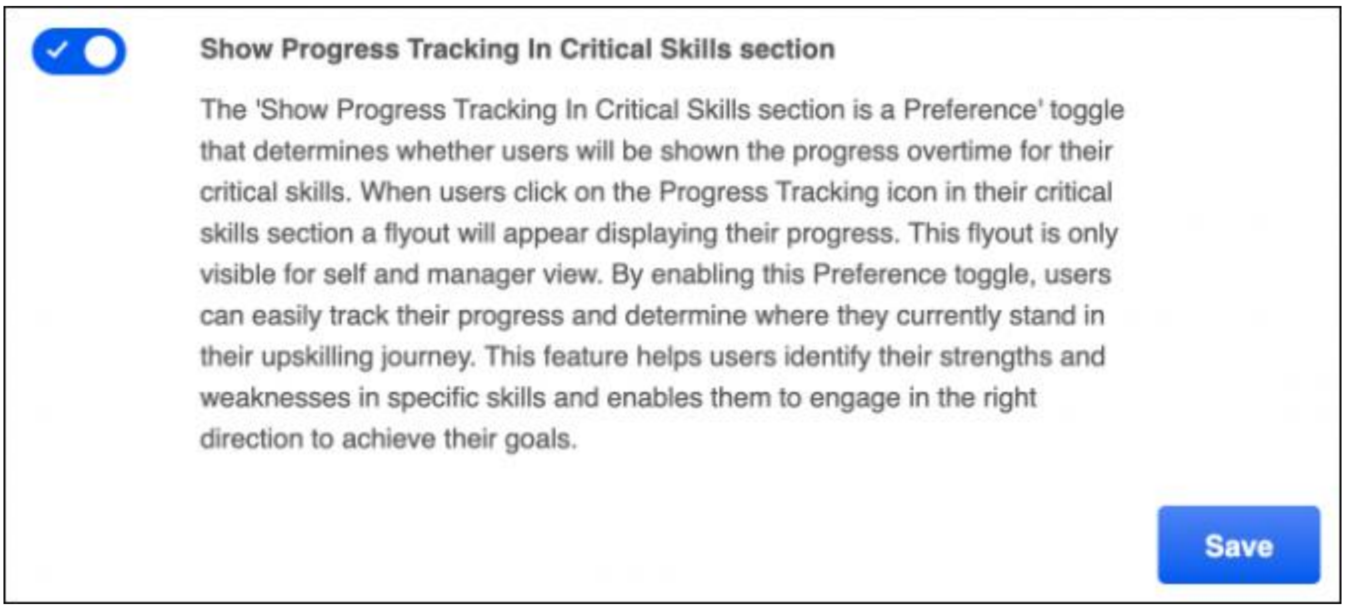
A new toggle is available in Skills Profile Preferences that controls whether managers and users can access the Critical Skills Progress Tracking flyout. The Critical Skills Progress Tracking flyout displays the user's progress over time for their critical skills. This toggle is enabled by default.

- Show progress tracking in critical skills section

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

Permissions

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



Skills Profile - Your Critical Skills

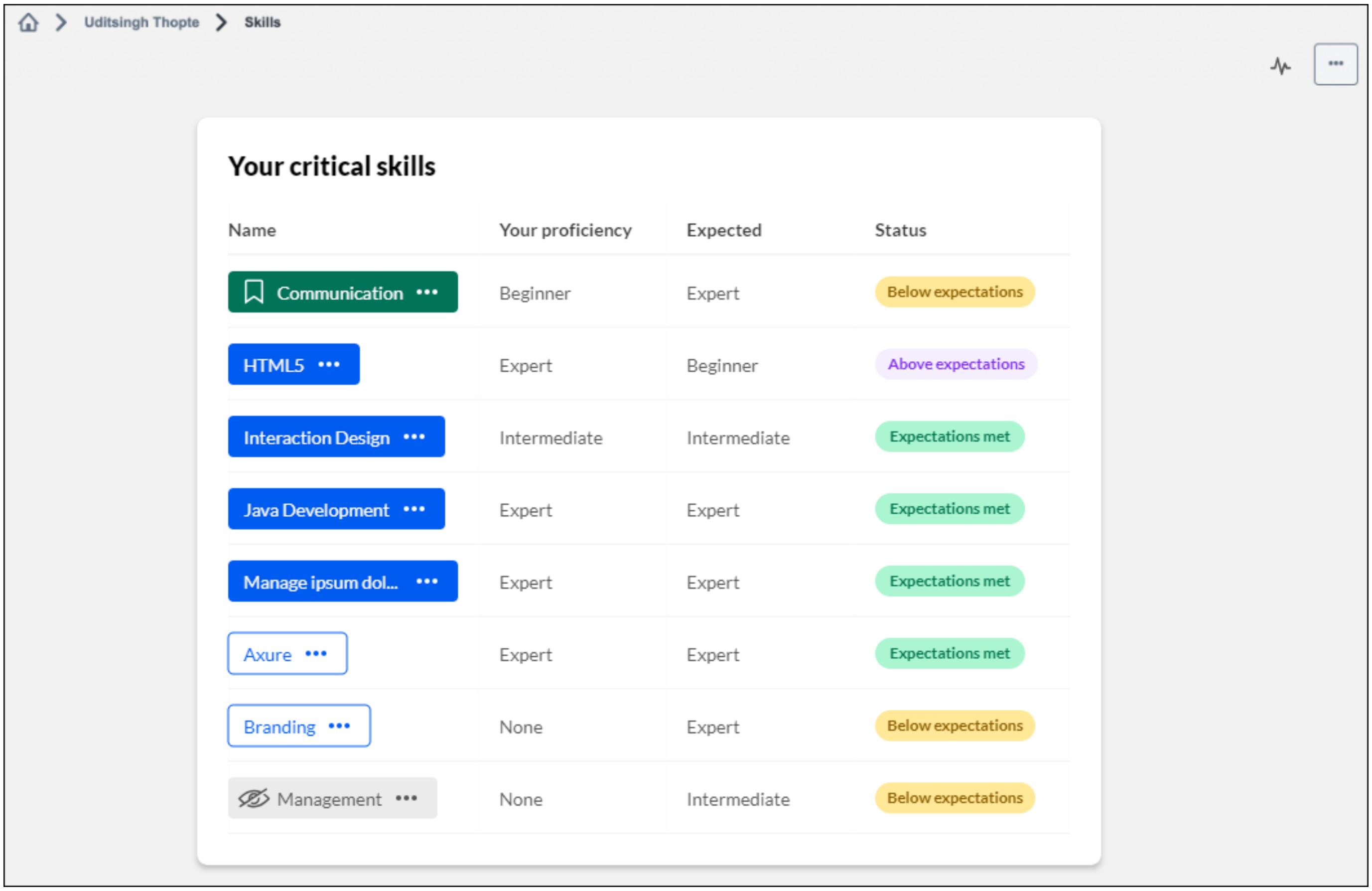
With this enhancement, a new icon is available in the Your Critical Skills section. Select this option to open the Critical Skills Progress Tracking flyout. This option is available for managers viewing their subordinates profile and for users viewing their own profile. This option is only available if enabled in Skills Profile Preferences. *See* **Critical Skills Progress Tracking Flyout** on page 136 *for additional information.*

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


Uditsingh Thopte
Skills
Your critical skills
Name
Your proficiency
Expected
Status
Communication
Beginner
Expert
Below expectations
HTML5
Expert
Beginner
Above expectations
Interaction Design
Intermediate
Intermediate
Expectations met
Java Development
Expert
Expert
Expectations met
Manage ipsum dol...
Expert
Expert
Expectations met
Axure
Expert
Expert
Expectations met
Branding
None
Expert
Below expectations
Management
None
Intermediate
Below expectations

Critical Skills Progress Tracking Flyout

The Critical Skills Progress Tracking flyout displays a user's proficiency in their critical skills over time. Users and managers can view this information in chart or table format.

To view the Critical Skills Progress Tracking flyout, go to HOME > UNIVERSAL PROFILE. Then, click the Skills tab and view your skills profile. In the Critical Skills section, select the Heartbeat icon to view proficiency progress.

To access another user's Universal Profile - Bio page, select the user's photograph from any Universal Profile or Global Search page. 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 the ability to view an employee Skills Profile. Users with this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants the ability to perform ratings and view ratings. For administrators, this permission is required, along with the specific user rating administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Toggle Between Formats

To toggle between the chart and table format, select the appropriate icon in the upper-right corner of the page.

Select or Deselect Skills

By default, the user's top five critical skills are displayed.

To change which skills are included in the graph, select or deselect the appropriate skills in the *Skills* section on the left.

Chart Format

The key below the chart indicates which color corresponds to each skill.

Users can hover their cursor over a point on the graph to view the overall rating percentage

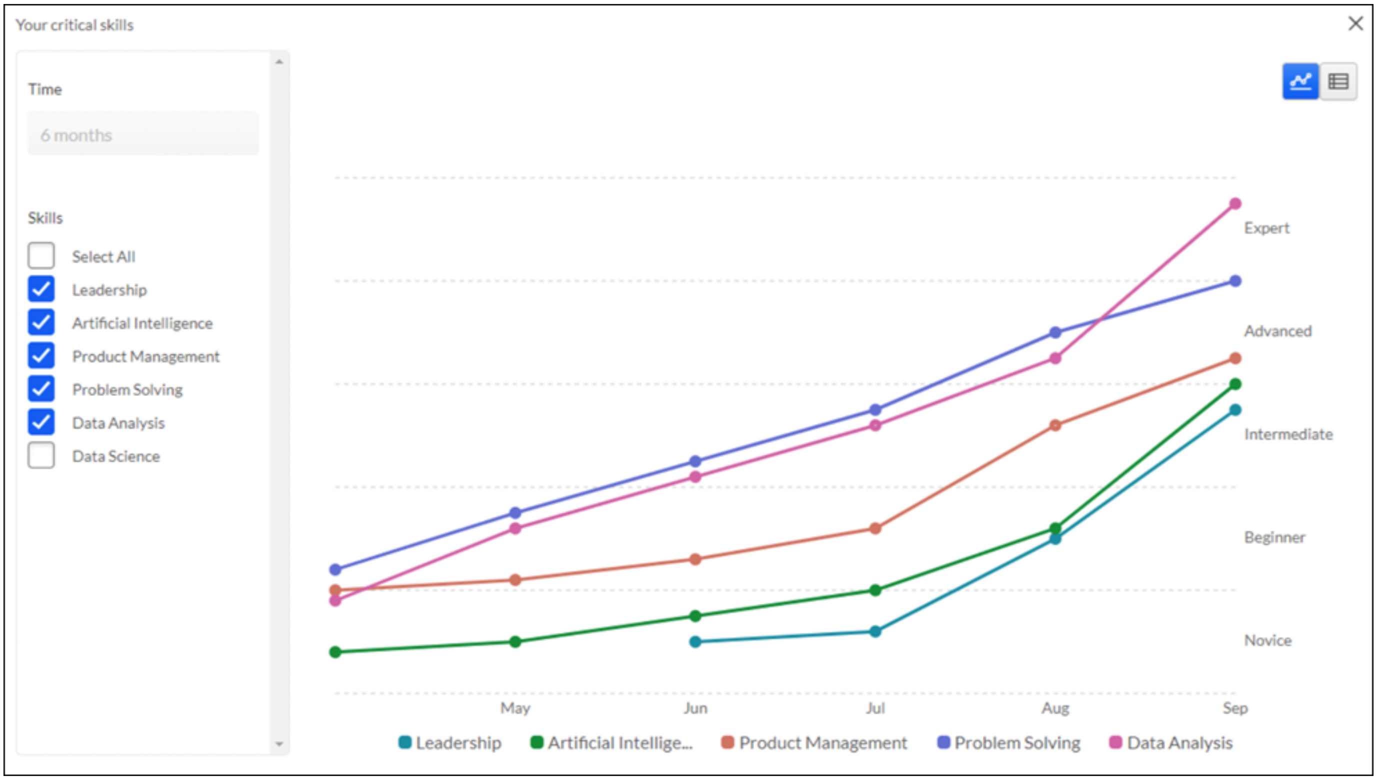


Table Format

The Skills Assessment column indicates whether the skill is strengthened, weakened, or if there is no progress over the selected time frame.

our critical skills

Time

6 months

Skills

- [x] Select All
- [x] web applications
- [x] AngularJS
- [x] d3.js
- [x] GraphQL
- [x] JSON
- [x] C#
- [x] program management
- [x] java
- [x] jquery

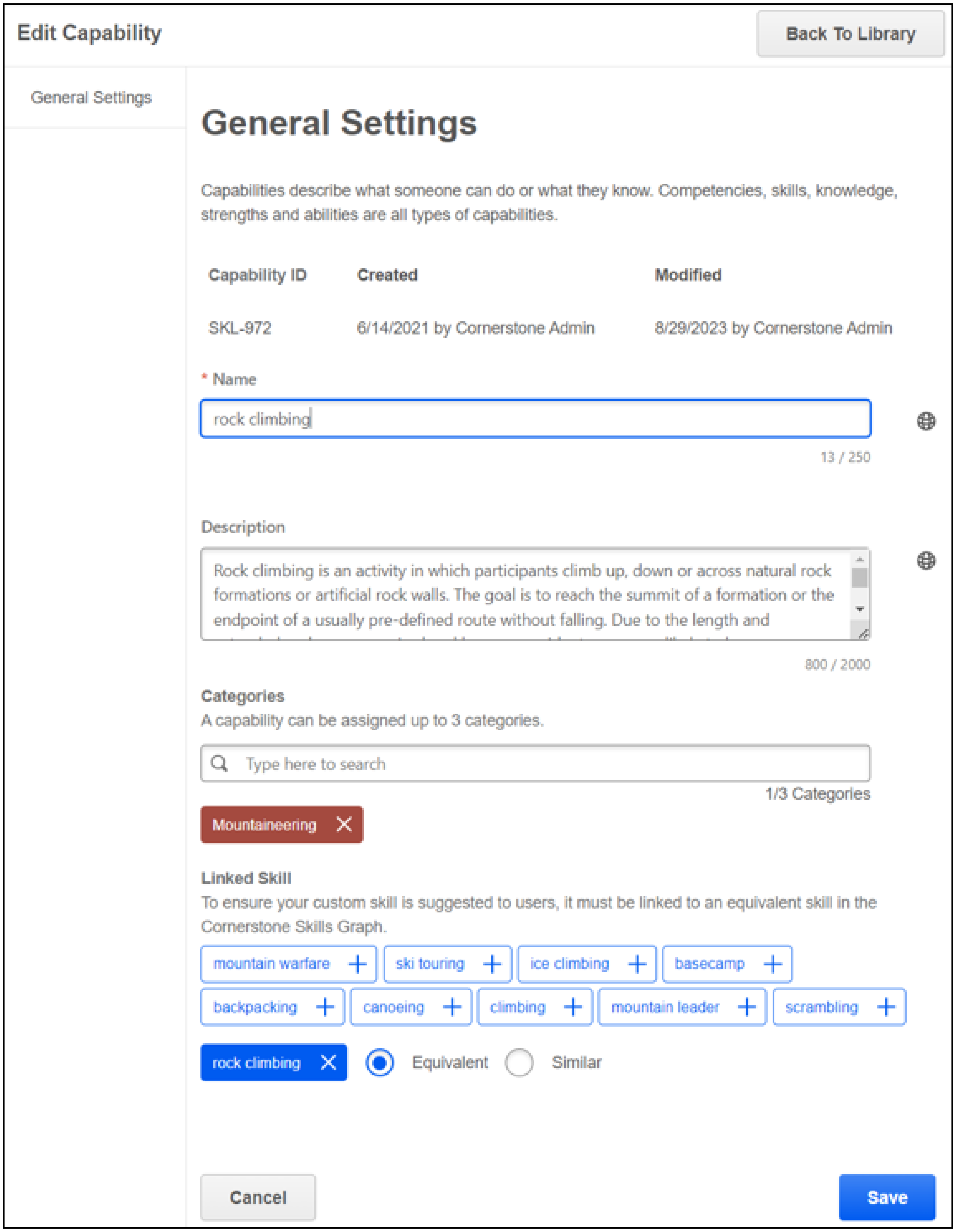
Skills	Skill Assessment	Mar	Apr	May	Jun
web applications	Strengthened	1 (2%) novice	2 (4%) beginner	2 (4%) beginner	2 (4%) beginner
AngularJS	Strengthened	1 (2%) novice	2 (4%) beginner	2 (4%) beginner	2 (4%) beginner
d3.js	Strengthened	1 (2%) novice	2 (4%) beginner	2 (4%) beginner	3 (6%) intermediate
GraphQL	Strengthened	1 (2%) novice	1 (2%) novice	2 (4%) beginner	3 (6%) intermediate
JSON	Strengthened	1 (2%) novice	1 (2%) novice	2 (4%) beginner	3 (6%) intermediate
C#	Strengthened	1 (2%) novice	1 (2%) novice	3 (6%) intermediate	3 (6%) intermediate

Unlinking Skills Graph Skills

When editing skills that were imported from the Skills Graph taxonomy, administrators now have the option to unlink the Capability from the underlying Skills Graph engine. This helps prevent overlapping Skills Graph IDs between Cornerstone-provided and custom skills.

This feature is most applicable where a custom skill must be linked to an equivalent Skill Graph ID, but that skill is already used from a Skills Graph import.

Administrators can unlink skills by selecting the X icon next to the name of the linked skill in the Linked Skill section.



How Does this Enhancement Benefit My Organization?

Administrators can now unlink Skills Graph skill IDs from imported skills to facilitate linking 3rd-party or custom skills to the Skills Graph AI engine.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

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

Core/General Enhancements

Accessibility Enhancements - November 2023

With this enhancement, Cornerstone CSX is making accessibility fixes within an application to enhance user inclusivity, ensuring a wider audience can seamlessly interact with and benefit from the platform.

The following accessibility enhancements have been made:

- Keyboard Accessibility Support - Significant strides have been made to bolster the user experience for everyone. We've introduced Keyboard Accessibility Support, ensuring users can efficiently navigate and interact with our application without relying on a mouse.
- Improvements to Screen Reader Support - Considerable improvements have been made to our Screen Reader Support, optimizing the way information is conveyed to blind or low vision users
- Color Contrast Enhancements - Recognizing the importance of visual clarity, enhancements have been made to our color contrast, making it easier for individuals with color vision deficiencies to discern content
- Semantic HTML Improvements - By refining our use of Semantic HTML, we've not only made our application more comprehensible for assistive technologies but also streamlined the overall user experience
- Support with Dragon Speech Recognition Software

Learning Administration

The following accessibility issues are fixed with the Catalog Management:

- Added a proper title attribute
- Added a description to the "Pin to sidebar" button
- Corrected visual link truncation issues
- Defined a decorative image alt attribute
- Corrected screen reader notification issues

The following accessibility issues are fixed within the Connect module:

- Corrected various web accessibility issues such as non-descriptive labels, roles not defined, missing labels, and inappropriate labels

The following accessibility issues are fixed within the Email module:

- Corrected link purpose issues
- Added missing labels
- Corrected an inappropriate label for a button

The following accessibility issues are fixed with the Learning Assignment Tool:

- Corrected multiple accessibility issues such as incorrect labeling, screen reader notification issues, and incorrect role definitions

The following accessibility issues are fixed with the Observation Checklist page:

- Corrected several web accessibility issues such as focus order, labels, and heading structures

Learning End User

The following accessibility issues are fixed with the Learning Details page:

- Corrected issues with how blanks are read and the presentation of data to screen readers

The following accessibility issues are fixed with the Login page:

- Corrected a focus placement issue on the Login button

The following accessibility issues are fixed within the Materials module:

- Corrected missing heading mark-up and identical label issues

The following accessibility issues are fixed within the Reporting module:

- Corrected visibility of focus outlines and other issues

The following accessibility issues are fixed with the Scheduled Tasks page:

- Corrected issues with h1 tags, focus movement, and other web accessibility challenges

The following accessibility issues are fixed with the Event Calendar page:

- Corrected various web accessibility issues related to labeling, grouping, and parsing

The following accessibility issues are fixed with the Events & Sessions page:

- Corrected issues related to name, role, value definitions, and structural problems inside forms

The following accessibility issues are fixed with the ILT Vendors and Instructors page:

- Corrected link description issues
- Corrected color contrast issues

The following accessibility issues are fixed with the Transcript page:

- Corrected web accessibility issues ranging from page titles, heading structures, and link purposes

The following accessibility issues are fixed with the Universal Profile page:

- Corrected several web accessibility issues such as keyboard support, unclear labels, and error messages

The following accessibility issues are fixed with the Learner Home and Playlists page:

- Corrected issues with color contrast ratios, focus orders, and information and relationship definitions

Performance

The following accessibility issues are fixed with the Manager Performance Review Overview page:

- Corrected the screen reader focus to not navigate to a blank column

- Corrected the labels for the 'From' and 'To' date edit fields for the screen reader
- Corrected the labels for the asterisks for the screen reader
- Corrected focus styles for decorative images like the triangle within the combo box
- Corrected an issue where the submission confirmation dialog was clipping on both sides to where text and button elements were obscured
- Corrected an issue where selecting a radio button shifted focus to the top navigation bar
- Corrected an issue where the graphics within a table gained focus and were announced by the screen reader

The following accessibility issues are fixed with the Talent Profile page:

- Corrected an issue with the focus order

The following accessibility issues are fixed with the Scheduled Tasks page:

- Improved the contrast ratio for the text
- Corrected an issue where the decorative graphics in the table gained focus and were announced by the screen reader

The following accessibility issues are fixed with the Manage Roles page:

- Corrected an issue where the decorative graphics in the table gained focus and were announced by the screen reader
- Corrected an issue where part of the text in the step content was clipped by the main content and could not be accessed

The following accessibility issues are fixed with the Manager Performance Review - Launch Review page:

- Corrected an issue where content is clipped when the browser is scaled to 200%
- Corrected an issue where the screen reader did not announce the page title when the new page is loaded
- Improved the contrast ratio with the Version Number
- Added a visual indication for required edit fields
- Added an announcement for error messages
- Added accessible names for the First and Last Page buttons
- Corrected an issue where selecting an element disrupts the focus order
- Corrected an issue where the screen reader announced invisible links

Recruiting

The following accessibility issues are fixed with the Career Site page:

- Improved the contrast ratio with links in the footer for internal career sites
- Improved button labels
- Made heading labels more unique
- Set the page title for screen readers

The following accessibility issues are fixed with the Manage Requisitions page:

- Updated labels so text fields are announced
- Updated the Close button in the Approval modal so it can be accessed via keyboard

The following accessibility issues are fixed with the Offer Letter page:

- Updated the page to improve focus navigation
- Updated the editing options so they are accessible by keyboard navigation and screen reader

The following accessibility issues are fixed with the Recruiting Email Login page:

- Updated the page to ensure unseen elements do not receive focus

The following accessibility issues are fixed with the Recruiting My Profile page:

- Improved the contrast ratio for the status text of list items

The following accessibility issues are fixed with the Manage Candidates page:

- Added a status message when successfully posting a comment
- Updated the page so the Resume and Application links are announced properly

The following accessibility issues are fixed with the Job Requisition page:

- Updated the page so JAWS readers can read or edit text inside the text area

Design System Updates

The following changes were made to common elements across the system:

- Breadcrumb - Made improvements for screen readers and icon labeling
- Date picker - Improved keyboard control, focus trap, and color contrast on days of the week
- Drop-down - Improved screen reader use, focus, and selected states
- Line chart - Improved keyboard use and focus management
- Radio - Enhanced focus state
- Textbox & Text Area - Improved form labels and behavior and character count
- Toasts - Added support for zoom to 200%
- Toggle Switch - Added Aria support for on/off states and keyboard interactions
- Tooltip - Ensured the tooltip is visible on keyboard focus

Implementation

This functionality is automatically enabled for all organizations.

Custom Login Page Enhancements

Custom Login Page Enhancements

The Custom Login Page functionality is optimized and refined to provide an even more visually pleasing experience and improve performance when using the Custom Login Page tool and accessing login pages built using the tool.

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 the ability 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

Manage Custom Login Pages

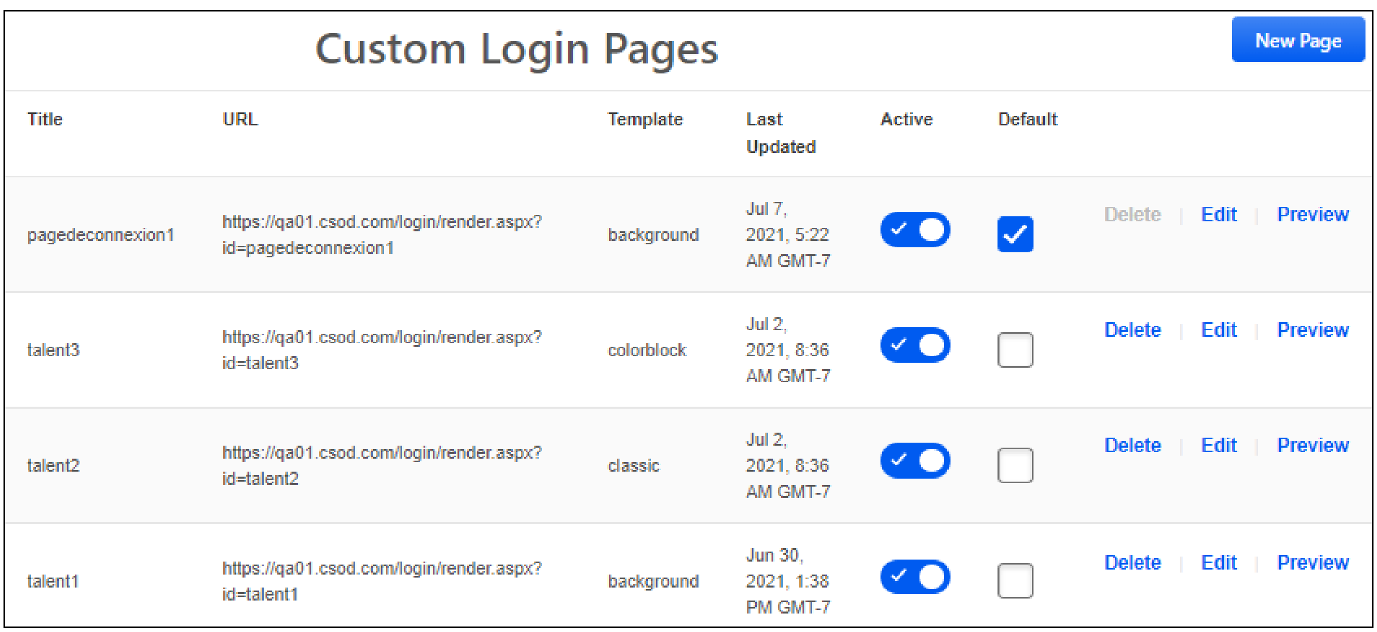
The following enhancements have been made to the Custom Login Pages page:

- Previously, the Custom Login Pages dashboard had various fonts in use. With this enhancement, the page adopts a consistent font throughout.
- The dashboard title is now centered for a more refined appearance.
- The spacing between row values is minimized for a cleaner layout.
- A new Template column has been added to allow administrators to identify the template applied to each login page easily.
- When a custom login page is the default page, the **Delete** link is disabled to prevent administrators from accidentally deleting the default login page.
- Previously, the Preview screen overlapped with specific controls, making navigating and closing the preview challenging. The Preview screen is redesigned to eliminate these challenges.
- Previously, there was latency when loading the Custom Login Page dashboard. The underlying processes are optimized, and pagination is added to improve performance.

To manage custom login pages, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > CUSTOM LOGIN PAGE.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Login Page - Manage	Grants the ability 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



Custom Login Page Builder Optimizations

The following enhancements have been made to the Custom Login Page Builder:

- The underlying framework is updated. This transition enhances the page's performance and significantly reduces security vulnerabilities.
- Page titles now have a 20-character limit to prevent issues with deep link URLs and multi-factor authentication.
- Footer notes now have a 150-character limit to prevent data overflow issues.
- When editing existing pages, a message about the character limit appears as an informational prompt. However, this message does not prevent users from saving changes.
- Support Email links now support web pages.
- To ensure a more inclusive and accessible user experience, Aria-Labels and alt text are now supported for the following fields for end users accessing the custom login page:
    - Company Logo
    - Login Button
    - Username/User ID
    - Password
    - SSO Link
    - Self Reg Link
    - Forgot Username
    - Forgot Password
    - Contact Us

To create a custom login page, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > CUSTOM LOGIN PAGE. Then, select the **NEW PAGE** button.

To edit a custom login page, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > CUSTOM LOGIN PAGE. Then, select the **Edit** link for the appropriate page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Login Page - Manage	Grants the ability 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

Default Email Address Settings - Changes to Deletion Behavior

Due to an identified performance issue related to one of the July ’23 Release enhancements, the behavior of the Delete action is changed to avoid negative impacts to customers while we work on the performance optimization. With this change, administrators can now delete a default email address in the Corporate Preference page when the default email address is used in emails and templates. This does not impact the configuration of existing emails and templates that are using the deleted default email address.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

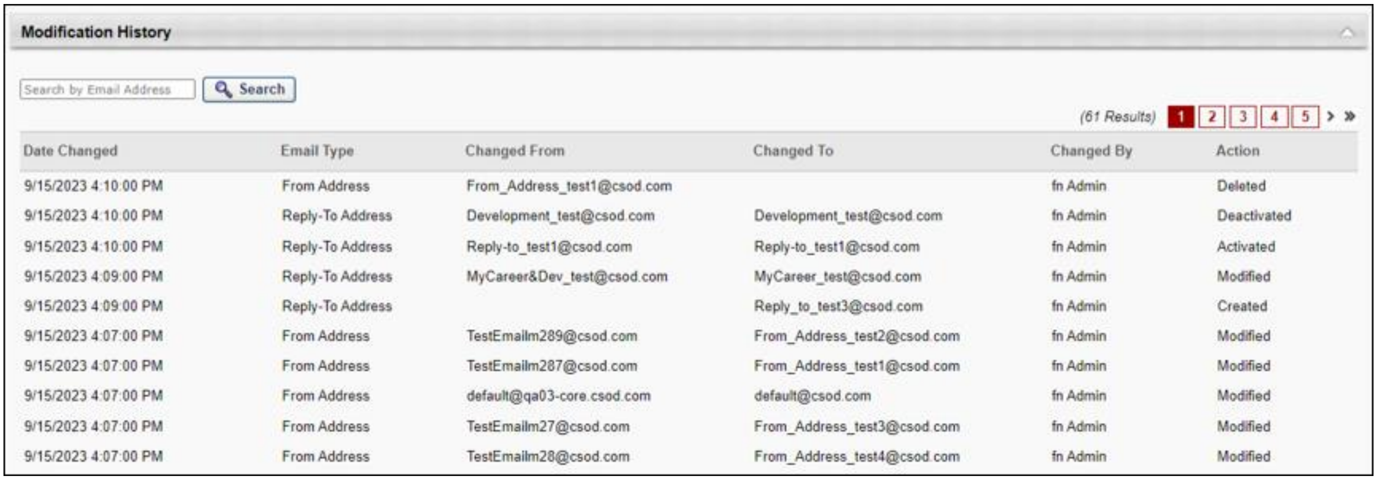
The following existing permission applies to this functionality:

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

Default Email Address Settings - Modification History

With this release, Default Email Address Settings now provide the ability to track changes via Modification history for auditing purposes or to aid in troubleshooting.

Modification history allows administrators to view a detailed record of all edits, updates, and deletions made to a default email address, along with the date and time of each change and the user who made it. There is an option to search the modification history by default email address for quick lookup.



Modification History

Search by Email Address | Search

(61 Results) 1 2 3 4 5

Date Changed	Email Type	Changed From	Changed To	Changed By	Action
9/15/2023 4:10:00 PM	From Address	From_Address_test1@csod.com		fn Admin	Deleted
9/15/2023 4:10:00 PM	Reply-To Address	Development_test@csod.com	Development_test@csod.com	fn Admin	Deactivated
9/15/2023 4:10:00 PM	Reply-To Address	Reply-to_test1@csod.com	Reply-to_test1@csod.com	fn Admin	Activated
9/15/2023 4:09:00 PM	Reply-To Address	MyCareer&Dev_test@csod.com	MyCareer_test@csod.com	fn Admin	Modified
9/15/2023 4:09:00 PM	Reply-To Address		Reply_to_test3@csod.com	fn Admin	Created
9/15/2023 4:07:00 PM	From Address	TestEmailm289@csod.com	From_Address_test2@csod.com	fn Admin	Modified
9/15/2023 4:07:00 PM	From Address	TestEmailm287@csod.com	From_Address_test1@csod.com	fn Admin	Modified
9/15/2023 4:07:00 PM	From Address	default@qa03-core.csod.com	default@csod.com	fn Admin	Modified
9/15/2023 4:07:00 PM	From Address	TestEmailm27@csod.com	From_Address_test3@csod.com	fn Admin	Modified
9/15/2023 4:07:00 PM	From Address	TestEmailm28@csod.com	From_Address_test4@csod.com	fn Admin	Modified

Implementation

This functionality is automatically enabled for all organizations.

This enhancement previously included overwrite logic to support the process of updating default email addresses that are used in existing emails and templates simply and quickly. The overwrite logic is being removed from the November ’23 Release; timing for the removal of this logic in stage portals is still being determined.

Permissions

The following existing permission applies to this functionality:

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

Group Preview (Early Adopter)

Group Preview (Early Adopter)

Groups are used for many business-critical functions, including learning assignments, task assignments, and generating reports. When editing a Group, it is easy to make errors, resulting in erroneous training or task assignments that are difficult and time-consuming to fix. The only way to detect a mistake is to save the edited Group, wait for the refresh to process, and then view the users in the Group to see if the membership is correct.

The Group Preview enhancements allow administrators to preview the Group membership based on the edited criteria so mistakes can be detected and fixed before saving the Group. Administrators can also save changes as a draft so edits can be made asynchronously while the current Group is retained.

The following key features are included in this enhancement:

- Generate a preview of users in the Group based on edited criteria before saving the edits.
- Create a Draft Group for asynchronous editing and preview. Draft Groups are saved for 90 days unless they are published or deleted.
- Optionally require all administrators to generate a preview before saving Group edits.
- Additional pop-up notifications will be sent when critical actions are taken.

How Does this Enhancement Benefit My Organization?

This enhancement allows previewing Group membership based on the edited criteria to detect and fix mistakes before saving. Administrators can also save changes as a draft so edits can be made asynchronously while the current Group is retained.

Frequently Asked Questions (FAQs)

After waiting approximately three minutes for a preview to process, a message displayed stating, “It is taking longer than expected to generate the preview….” What is causing that to happen?

Preview processing time varies based on the criteria being evaluated. However, most Group previews will process in fewer than three minutes. If the preview has not been generated within three minutes, the administrator receives this message, so they know the preview is still processing. An administrator can cancel and try again, which often resolves any latency, or select the Save Draft and Generate Preview option, which creates a draft using the modified criteria and continues processing the preview in the draft.

I chose the Save Draft and Generate Preview option. Will I receive a notification when the preview is done processing in the draft?

No. Currently, there is no email notification when a preview is done processing in a draft.

Am I the only person who can access the draft Groups I create?

No. Based on permissions and constraints, any administrator with access to edit a Group can resume and publish a draft for that Group.

When a draft is published, will the group’s modification history show who published the draft?

There are no changes or enhancements to the Group Modification History. If a draft is published, the Group’s Modification History will show "Modified by” followed by the administrator’s name, just as if edits are made directly on the Edit Group page.

Is a special security permission needed to preview or save a draft?

No. Any administrator with access to edit an existing group can generate a preview or save and publish a draft.

Can I generate a preview when I am creating a new group?

No. Preview is only available when editing an existing group. If you are creating a new group and want to use preview, save the group, then edit and begin adding criteria. You can then generate a preview.

Can we still use Edge Import to update Groups if 'Require Preview Before Saving Edits' is enabled?

Yes. The 'Require Preview Before Saving Edits' setting does not apply to changes made via Edge Import.

When a copy-down is performed, will any drafts in Production be copied to the lower environment?

No. The Group Preferences settings will be copied down, but any draft Groups in the higher environment will not be copied down.

Can I view or export the complete preview membership list?

No. It is not possible to view or export the complete preview membership list.

Is an administrator required to preview the Group when only metadata are edited?

No. It is not possible to generate a preview until at least one criterion is edited. Changes to the Group metadata, such as Title, ID, Description, do not require a Preview to save the group.

What pop-ups are introduced when "Group Preview and Save Draft" is activated?

- Administrator selects 'Save Draft' (pop-up with the option to save draft only or save draft and generate preview)
- Administrator saves group edits or publishes a draft without generating a preview (confirmation)
- Administrator saves group edits or publishes a draft after generating a preview (confirmation)
- Administrator cancels group edits, cancels draft edits, or deletes a draft (confirmation)
- Administrator attempts to edit a group with a draft (resume draft pop-up)
- Administrator saves a new draft when one already exists (replace draft)

Implementation

This functionality is automatically available but turned off for all organizations. Administrators with the *Group Preferences - Manage* permission can enable the functionality via the new Group Preferences page in Core Preferences. Group Preferences are global and cannot be configured by OU. Group Preview can be deactivated at any time. However, deactivating the feature will delete any draft groups.

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Group Preferences - Manage	Grants the ability to access and modify the Group Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration

The following existing permissions apply to this functionality:

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

Group Preferences

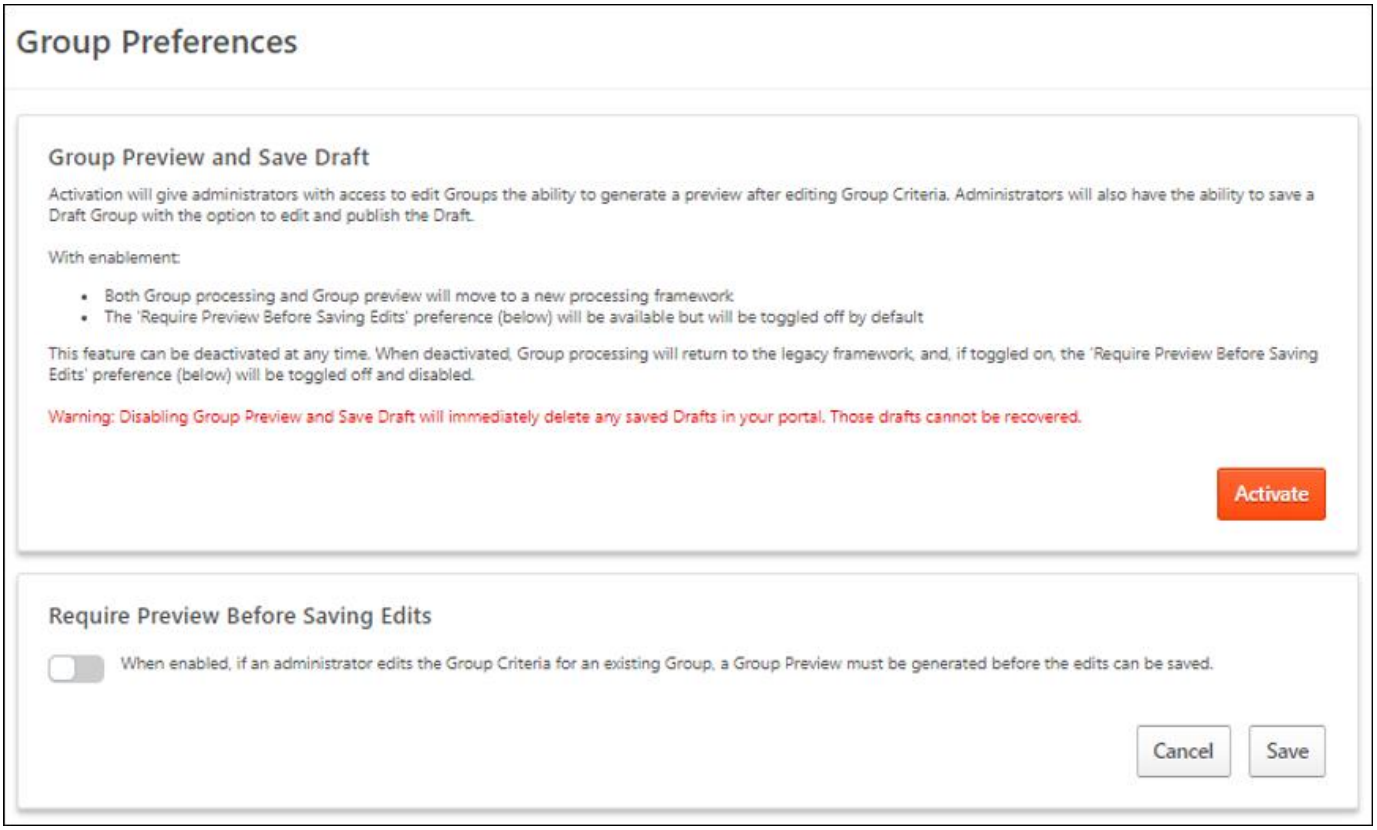
The Group Preferences page enables administrators to activate the Group Preview and Save Draft features. Once Group Preview is activated, administrators can require a preview before saving edits.

Group Preferences are global and cannot be configured by organizational unit (OU).

To access Group Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > GROUP PREFERENCES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Group Preferences - Manage	Grants the ability to access and modify the Group Preferences page. This permission cannot be constrained. This is an administrator permission.	Core Administration



Group Preview and Save Draft

Select the **ACTIVATE** button to activate the Group Preview and Save Draft functionality. This also enables the option to change the **Require Preview Before Saving Edits** preference.

This functionality can be deactivated at any time. When this functionality is inactive, the **Require Preview Before Saving Edits** preference is disabled and cannot be enabled. Deactivating this functionality immediately deletes any saved Group drafts in the portal that cannot be recovered.

Note: *Activating Group Preview and Save Draft does not impact your Group refresh schedule.*

Require Preview Before Saving Edits

Select the toggle to require all administrators to generate a preview of the Group before saving any criteria changes. By previewing the membership of the Group before saving the changes, the administrator can review the updated Group and potentially identify any unexpected issues.

If this preferences is off, administrators are not required to generate a preview of the Group before saving edits. However, they still have the option to do so if Group Preview and Save Draft are activated.

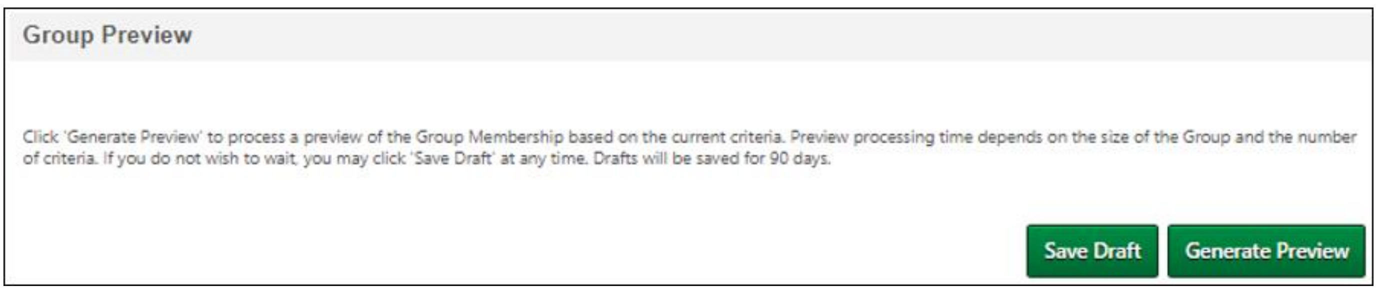
Edit Group - Preview and Save Draft

When enabled, administrators editing a group now have the option to preview the group membership before saving criteria changes and the option to save the edited group as a draft before publishing changes.

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

Permissions

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



Group Preview Section

If the Group Preview and Save Draft functionality is activated in Group Preferences, a Group Preview section is available when editing a group. The administrator can preview or save the modified Group as a draft in the Group Preview section.

The Save Draft and Generate Preview options are only available if the **Active** checkbox is selected and the **Freeze Group Processing** checkbox is unchecked.

Generate Preview

To preview the modified Group, select the **GENERATE PREVIEW** button. The preview processing time varies depending on the criteria, but most previews will process in fewer than three minutes. While the preview is generated, administrators can cancel the preview or save the modified Group as a draft.

When the preview processing is complete, the following information is displayed:

- Preview Generated - This displays the date and time the preview was processed in the administrator's time zone.

- Group Members in the Preview - This displays the number of users in the portal who meet the Group Criteria. Administrators can compare this value with the Current Group Membership value to understand the potential impact on the Group if the edits are saved.

Note: The Group Preview includes users who met the Group Criteria when the preview was generated. If the Group is saved, membership will be re-processed, and users who meet the criteria at that time will be included in the Group.

The administrator can select the **Search Users** link to search for specific users in the preview. When searching for users, an error message is displayed if more than 100 users in the portal meet the search criteria.

It is not possible to view or export the complete preview membership list.

Save Draft

A draft Group can be edited asynchronously while the current Group remains active and regularly processes. The draft Group can later be published to replace the current group.

Select the **SAVE DRAFT** button to save the modified Group as a draft. A pop-up opens with the following options:

- **SAVE DRAFT AND GENERATE PREVIEW** - Select this option to create a draft with the modified Group Criteria and initiate the Group Preview process for the draft. If a Preview is already underway, the preview continues processing.
- **SAVE DRAFT ONLY** - Select this option to create a draft with the modified Group Criteria without generating a preview. If a preview is already underway, the preview continues processing.

After a draft is saved, any administrator with access to the Group can access the draft Group from the Manage Group page for 90 days unless the draft is published or deleted.

Draft Group Options

Draft Groups have the following options:

- Publish - Select this button to publish the draft Group. The draft replaces the active version of the Group, and the Draft link is removed from the Manage Group page.
- Delete Draft - Select this button to delete the draft.
- Save Draft - Select this option to save any changes made to the draft. This replaces the previous draft.

Required Preview Before Saving Edits

Administrators may require a Group preview to be generated whenever the Group Criteria are modified.

When this preference is enabled, the Save and Publish options are disabled when the Group Criteria are modified, and the administrator has not previewed the Group.

When this preference is disabled, administrators are not required to preview the Group membership, but they are prompted to optionally generate a preview of the Group membership when the Group is saved or the draft is published.

Manage Groups - Drafts

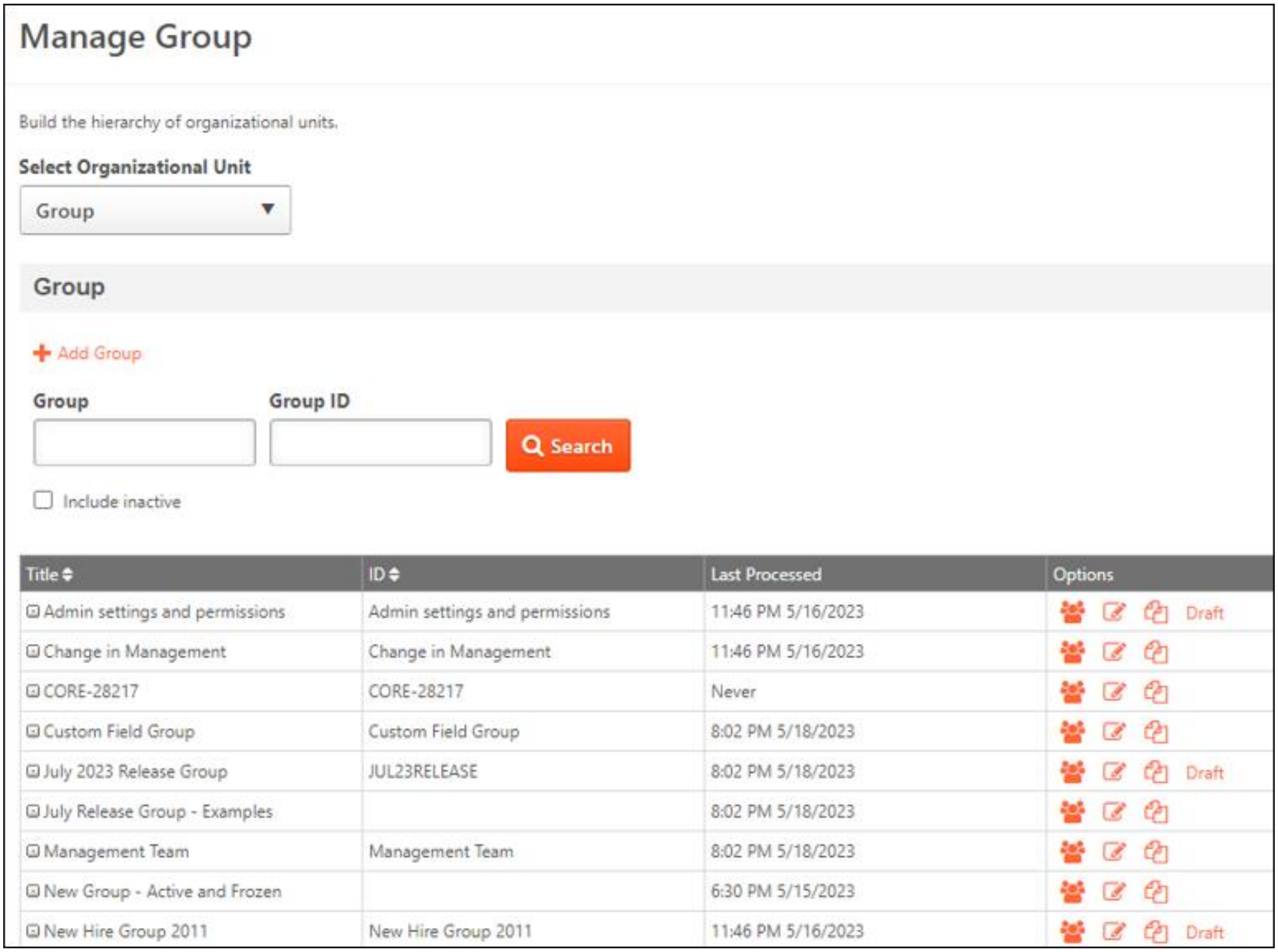
When an administrator saves a draft of a modified Group, any administrator with access to the Group can access the draft Group from a Draft link on the Manage Group page. The draft is available for 90 days unless it is published or deleted.

If an administrator edits a Group with a draft, a pop-up asks the administrator to resume the draft or continue editing the group. If the Group is edited and saved, the draft is automatically deleted.

To access the Manage Group page, go to ADMIN > TOOLS > CORE FUNCTIONS > ORGANIZATIONAL UNITS. Click the **Manage Organizational Unit Hierarchy** link. From the **Select Organizational Unit** drop-down list, select Group.

Permissions

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



Title	ID	Last Processed	Options
Admin settings and permissions	Admin settings and permissions	11:46 PM 5/16/2023	Draft
Change in Management	Change in Management	11:46 PM 5/16/2023	
CORE-28217	CORE-28217	Never	
Custom Field Group	Custom Field Group	8:02 PM 5/18/2023	
July 2023 Release Group	JUL23RELEASE	8:02 PM 5/18/2023	Draft
July Release Group - Examples		8:02 PM 5/18/2023	
Management Team	Management Team	8:02 PM 5/18/2023	
New Group - Active and Frozen		6:30 PM 5/15/2023	
New Hire Group 2011	New Hire Group 2011	11:46 PM 5/16/2023	Draft

Multi Factor Authentication (Open Beta)

Cornerstone is excited to introduce support for time-based, one-time passwords (TOTP), the most widely adopted two-step verification method, which is considered a secure multi-factor authentication (MFA) method.

TOTP is generated by a software token and is an Internet Engineering Task Force (IETF) standard. It is the most convenient and accessible to implement because it runs on hardware that the user already owns.

Multi-factor authentication includes the following key features:

- There are no dependencies on 3rd-party providers or tools
- This solution uses open, documented, and secure standards
- Users can use a company smartphone or their device, following company policies
- The solution is highly configurable, based on Location OU, Division OU, or individual Users
- It is easy for administrators to configure for quick enablement and rollout to a specific portal
- The solution is independent of any single sign-on (SSO) integration. The MFA solution can run in parallel to SSO.

This functionality will be released in a post-release patch.

How Does this Enhancement Benefit My Organization?

This enhancement provides a simple, smart, and secure two-factor authentication (2FA) solution to build stronger authentication into the Cornerstone CSX standard login process.

Two Factor Authentication

When this functionality is enabled, users are prompted for an authentication code after entering their username and password. The customer's authentication application generates the authentication code.

Considerations

- Currently, MFA is only available in English.
- Currently, MFA is only available in Cornerstone's branding, including the background and logo.
- The following features are currently not supported:
    - Cornerstone CSX mobile application
    - External Candidates (Recruiting)
    - Support for email or SMS/text-message authentication
    - Self-Registration (Extended Enterprise) - Initial login and user creation is not supported, but MFA is supported for all subsequent logins
    - E-Signature features, such as training completion, where the user must sign with Cornerstone credentials

Implementation

Please contact Global Customer Support to enable access to the new permissions.

This functionality is targeted to be available in stage portals with the December 1 patch. MFA is not available in production portals during the Open Beta.

Additional documentation will be available in the MFA Open Beta Community.

This functionality will be released in a post-release patch.

The new permissions are automatically granted to the default System Administrator role upon enablement. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Glossary

- TOTP (Time-based One-time Password) - This is the most widely adopted two-step verification method and uses hardware the user already owns. This second layer of security is linked to a service by scanning a QR code displayed on the website or manually entering a code. Once the app and the web service are synchronized, the login process requires two steps: entry of username and password and confirmation of the one-time passcode generated by the software token.
- MFA (Multi-factor Authentication) - This is a verification method in which users must verify their identity in multiple ways, such as user name and password and an authentication code.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
MFA - Admin - User Device - Manage	Grants the ability to manage the user device information for Multi-factor Authentication. This permission works in conjunction with the MFA - Admin - User Device - View permission. Administrators can delete devices for user records within their constraints. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
MFA - Admin - User Device - View	Grants the ability to view the user device information for Multi-factor Authentication. Administrators can view the page for user records within their Users - View permission constraints, and additional constraints can be added to this permission. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
MFA - Administration - Manage	Grants the ability to view and configure Multi-factor Authentication (MFA). This permission cannot be constrained. This is an administrator permission.	Core Administration
MFA - Administration - View	Grants the ability to view the Multi-factor Authentication (MFA) configuration. This permission cannot be constrained. This is an administrator permission.	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

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

November '23 Language Pack Updates

New updates to Cornerstone Language Packs and additional languages are available with the November '23 Release. Please visit the **November '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 November '23 Release include:

- Finnish
- Romanian

Updated November 6: Additional language/changes added:

- Finnish
- Danish
- Dutch
- French France
- Polish

Updated November 13: Additional language/changes added:

- Swedish
- Ukrainian
- Finnish (Curriculum)
- Finnish (Manager)
- Finnish (Transcript)

Implementation

This functionality is automatically enabled for all organizations.

Edge Import

Edge Import - Edge Import Framework - Support Customer PGP Key

Previously, reports for PGP encrypted files were only available to customers in a redacted format. By supporting a public key that customers specify when they import a file to the Edge Import feed, customers can use their corresponding private key to decrypt the PGP encrypted load report.

The load report can only be decrypted by the customer's private key associated with that public key. Once decrypted, the user can then see records with errors so they can readily resolve them.

How does this work?

Nothing is changing with how customers encrypt the files they send to Cornerstone. Customers must still only use Cornerstone-generated PGP keys to encrypt their files.

Customers add their public PGP key in Key Management to inform Cornerstone which key they used to encrypt the file.

Customers select an additional key, one of their public keys, when creating a load so Cornerstone can use it to encrypt a report after performing the load. Customers can download the load report and use their private key to decrypt it using their decrypting tool.

Customers are responsible for managing their public and private keys for load reports.

How Does this Enhancement Benefit My Organization?

This feature targets customers using Edge Import and uploading PGP encrypted files. By allowing customers to add their own public PGP key, they can now decrypt the load reports.

Manage Keys

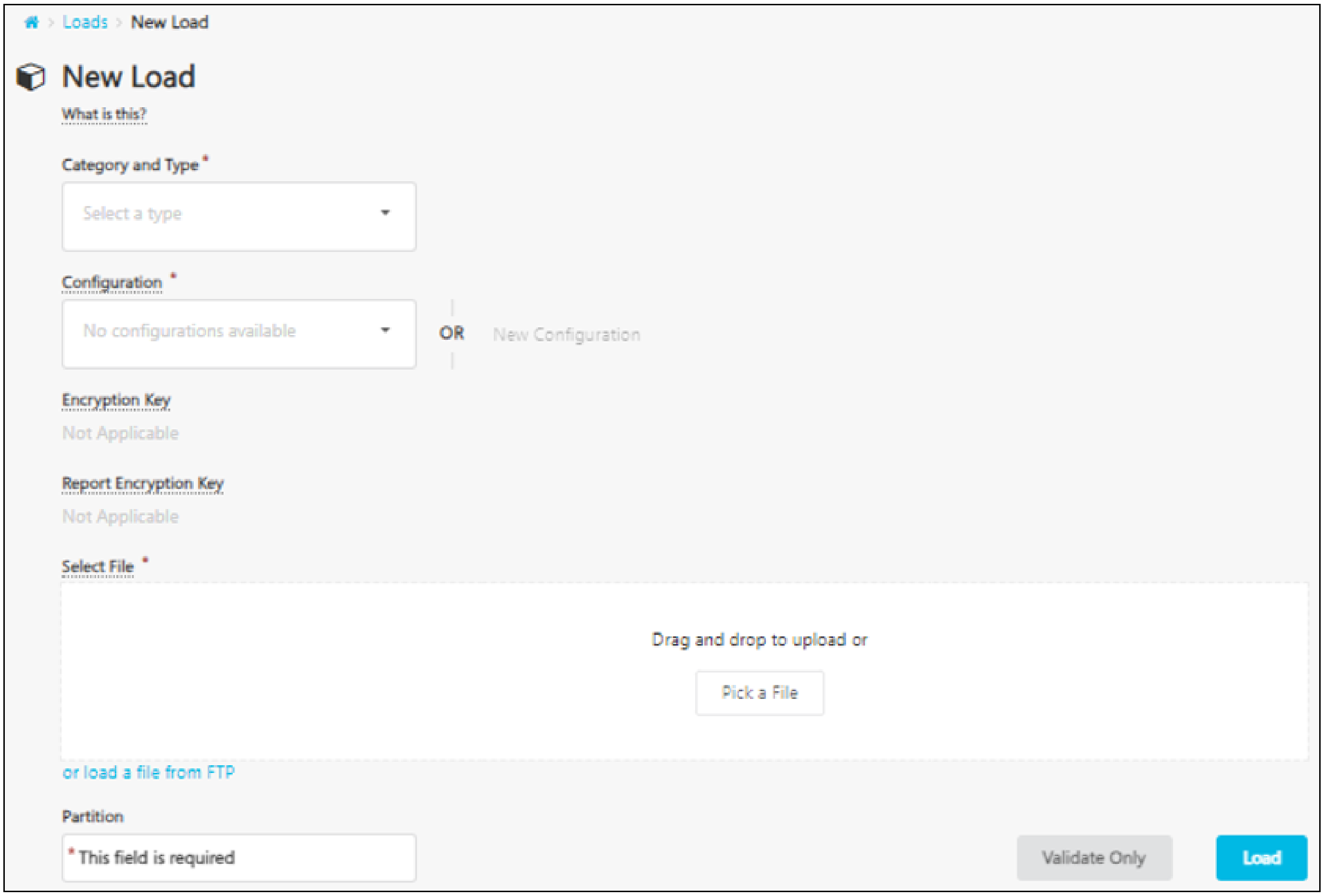
On the Manage Keys page, there are now two tabs:

- Encryption Keys - This tab contains all previously existing functionality from the Manage Keys page.
- Report Encryption Keys - This tab enables administrators to create keys to add their public key for Cornerstone to encrypt the reports.

A maximum of 20 Report Encryption Keys can be uploaded. Note that once the Report Encryption Key is uploaded, administrators cannot download nor view the value of the Report Encryption Key.

Create Load

Administrators can now select a Report Encryption Key when creating a new load.



Implementation

This functionality is automatically enabled for existing Edge Import customers. Customers must create a public/private key pair on their end. Please note that your portal may take a couple of days to update following the release of this new feature.

Permissions

The following existing permissions apply to this functionality:

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

Edge Import - Group Membership Load - Remove Inactive Users from Static Groups

When loading a Group Membership file via Edge Import, the Remove action can now remove "User is" criteria from the Group Criteria of a static group when the referenced user is inactive. Before this enhancement, attempting to remove those criteria would have generated an error.

This enhancement applies to static Groups, which are Groups that only contain "User is" criteria. Edge Import Group Membership loads still cannot be used to update combination Groups, which are Groups that contain both static and dynamic criteria, or dynamic Groups, which are Groups that contain only dynamic criteria.

Group Membership never includes inactive users and it is still not possible to add a "User is" criteria to a static Group if the referenced user is inactive.

Note: If the “User is” criteria references multiple users, Edge will not remove just one referenced user (either active or inactive) from within that string.

- Example: User is Smith, John (jsmith), [Thomas, Darron (dthomas) (Inactive)], Roger, Seth (sroger)

Implementation

This functionality is automatically enabled for existing Edge Import customers. The Template Guide in Edge Import will be updated to reflect this enhancement.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Group	Grants access to the Group organizational unit and Group Membership data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - ILT Transcript Load - Enhanced Ability to Update Due Date

With this enhancement, administrators can better manage ILT due dates in bulk, which reduces customer work orders.

This enhancement includes the following key features:

- Ability to delete a due date
- Ability to update a session transcript whose registration number is greater than 1
- Ability to apply the Event due date to a specific session transcript
- Newly created session transcripts inherit the Event due date if a due date is not specified
- For load configurations created after the November 2023 release, the Comments field is required to be mapped when the Due Date field is mapped. Existing load configurations created before the November 2023 release that have the Due Date field mapped and do not have the Comments field mapped will continue to work.

Implementation

This functionality is automatically enabled for existing Edge Import customers.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - ILT Transcripts Load	Grants access to the ILT Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import

Edge Import - Include Capability Categories in Capabilities Library Load

Administrators can now specify up to three category IDs to tag skills when using the Capability Load in Edge Import. A pipe character ("|") must separate multiple categories. Categories must already exist in the system before associating them with a skill. The categories provided in the data load will overwrite any categories already associated with the skill in the system.

A new tab labeled Categories is available in the Capabilities Load template to help administrators include the appropriate Category IDs.

Source	External ID	Type	Default Culture	Name	Description	Status	Categories
Edge Import	skill-142	Skill	1	Java	The techniques and p	Active	CAT-20
Edge Import	skill-463	Skill	1	Databases	Use software tools for	Active	CAT-20|CAT-21
Edge Import	skill-421	Skill	1	Data Analy:	Analysis of data is a p	Active	CAT-23
Edge Import	skill-553	Skill	1	Linux	Linux is a Unix-like an	Active	CAT-23
Edge Import	skill-841	Skill	1	PHP	The techniques and p	Active	CAT-27

	A	B
1	**Acceptable Values For: Categories**	**Description**
2	CAT-145	Forgery Category en-US (Status: Active, External ID: Forgery Category)
3	CAT-156	Forgery Category en-US | Espionage en-US (Status: Active)
4	CAT-610	Fundraising | Not for profit (Status: Active, External ID: __cat_fundraising)
5	CAT-338	Gaming | Leisure (Status: Active, External ID: __cat_gaming)
6	CAT-527	Geology | Science (Status: Active, External ID: __cat_geology)
7	CAT-490	Government operations (Status: Active, External ID: __cat_government_operations)
8	CAT-320	Graphic design | Visual arts (Status: Active, External ID: __cat_graphic_design)
9	CAT-515	Hair care | Health (Status: Active, External ID: __cat_hair_care)
10	CAT-278	Health (Status: Active, External ID: __cat_health)
11	CAT-329	Hospitality & Food & Tourism (Status: Active, External ID: __cat_hospitality)
12	CAT-294	Housing | Engineering (Status: Active, External ID: __cat_housing)

... | Considerations | Source | Type | Status | **Categories** | Langu: ...

Implementation

This functionality is automatically enabled for existing Edge Import customers. 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 Capabilities - Library Load	Grants access to load capabilities to the Capabilities Library via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

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

With this enhancement, a new Event Transcript Update load is available. This load enables administrators to update or delete due dates from ILT Events transcripts and associated curricula, reducing the need for work orders.

This new load type includes the following key features:

- Ability to update and delete event due dates
- Ability to update and delete an event's session due date
- Manage the event's impact on any associated curricula
- Ability to archive or unarchive event transcripts

When updating or deleting a due date, administrators can specify whether the action applies to transcript records for only the event, the event and its sessions, or the event, its sessions, and all associated curricula.

How to use the load

1. Download the Template Guide from Edge Import and prepare the import file.
2. Create a configuration in Edge Import.
3. Initiate a manual Event Transcript Update load to update Event transcripts that exist in the portal.

Due Date Action Use Cases

DUE DATE	DUE DATE ACTION ON	IMPACT ON
DATE TIME +/- UTC offset	Only Event	UPDATE ONLY for this standalone Event transcript. (default)
DATE TIME +/- UTC offset	Event and its Sessions	UPDATE for the Event and ALL Sessions associated to the standalone Event.
DATE TIME +/- UTC offset	Event, its Sessions and ALL LO associated transcripts	UPDATE for the Event and ALL Sessions associated to the standalone Event and for ALL LO associated transcripts.
DELETE	Only Event	DELETE ONLY for this standalone Event transcript. (default)
DELETE	Event and its Sessions	DELETE for the Event and ALL Sessions associated to the standalone Event.
DELETE	Event, its Sessions and ALL LO associated transcripts	DELETE for the Event and ALL Sessions associated to the standalone Event and for ALL LO associated transcripts.

Due Date Action on Only Event

Learner transcript has following ILT and Curriculum transcripts state:

1. Event Transcript Due date = 1st Dec 2023 (Event Registration Number = 2)
    1. Completed Session transcript due date = 1st Dec 2023 (Event Registration Number = 1)

    2. Not Completed Session transcript due date = 1st Dec 2023 (Event Registration Number = 2)
2. Event due date in Curriculum1 = 1st Oct 2023 (Event Registration Number = 2)
3. Event due date in Curriculum 2 = 1st Nov 2023 (Event Registration Number = 2)

Use Case 1: Want to update only Event due date to 10th Nov 2023

- Import File:
    - User ID = 123
    - Event ID = EV-01
    - Due Date = 10-11-2023 (In this example, Date Format is DD-MM-YYYY)
    - Due Date Action On = Only Event
- Expected Outcome (Changes in bold. Action only for greatest Registration Number)
    - **Event Transcript Due Date = 10th Nov**
        - Completed Session transcript due date = 1st Dec
        - Not Completed Session transcript due date = 1st Dec
    - Event due date in Curriculum1 = 1st Oct
    - Event due date in Curriculum2 = 1st Nov

Use Case 2: Want to delete Event due date only

- Import File:
    - User ID = 123
    - Event ID = EV-01
    - Due Date = DELETE
    - Due Date Action On = Only Event
- Expected Outcome (Changes in bold. Action only for greatest Registration Number)
    - **Event Transcript Due Date = NO DUE DATE**
    - No impact on associated Sessions and Curriculum transcripts

The Due Date change can be seen in the following places:

1. Event Transcript record (if outside curriculum or not associated to curriculum)
2. Event Training Details page

Due Date Action on Event and its Sessions

Learner transcript has following ILT and Curriculum transcripts state:

1. Event Transcript Due date = 1st Dec 2023 (Event Registration Number = 2)
    1. Completed Session transcript due date = 1st Dec 2023 (Event Registration Number = 1)
    2. Not Completed Session transcript due date = 1st Dec 2023 (Event Registration Number = 2)
2. Event due date in Curriculum1 = 1st Oct 2023 (Event Registration Number = 2)
3. Event due date in Curriculum 2 = 1st Nov 2023 (Event Registration Number = 2)

Use Case 1: Want to update due date for Event and all its sessions transcript. Due date to 10th Nov 2023

- Import File:
    - User ID = 123

    - Event ID = EV-01
    - Due Date = 10-11-2023 (In this example, Date Format is DD-MM-YYYY)
    - Due Date Action On = Event and its sessions
- Expected Outcome (Changes in bold. Action only for greatest Registration Number)
    - **Event Transcript Due Date = 10th Nov**
        - Completed Session transcript due date = 1st Dec
        - **Not Completed Session transcript due date = 10th Nov**
    - Event due date in Curriculum1 = 1st Oct
    - Event due date in Curriculum2 = 1st Nov

Use Case 2: Want to delete due date from Event and all its session transcripts

- Import File:
    - User ID = 123
    - Event ID = EV-01
    - Due Date = DELETE
    - Due Date Action On = Event and its sessions
- Expected Outcome (Changes in bold. Action only for greatest Registration Number)
    - **Event Transcript Due Date = NO DUE DATE**
        - Completed Session transcript due date = 1st Dec
        - **Not Completed Session transcript due date = NO DUE DATE**
    - Event due date in Curriculum1 = 1st Oct
    - Event due date in Curriculum2 = 1st Nov

The Due Date change can be seen in the following places:

1. Event Transcript record (if outside curriculum or not associated to curriculum)
2. Event Training Details page
3. Session Transcript record
4. Session Transcript Details page

Due Date Action on Event, its Sessions, and All LO Associated Transcripts

Learner transcript has following ILT and Curriculum transcripts state:

1. Event Transcript Due date = 1st Dec 2023 (Event Registration Number = 2)
    1. Completed Session transcript due date = 1st Dec 2023 (Event Registration Number = 1)
    2. Not Completed Session transcript due date = 1st Dec 2023 (Event Registration Number = 2)
2. Event due date in Curriculum1 = 1st Oct 2023 (Event Registration Number = 2)
3. Event due date in Curriculum 2 = 1st Nov 2023 (Event Registration Number = 2)

Use Case 1: Want to update due date for Event and all its associations. Due date to 10th Nov 2023

- Import File:
    - User ID = 123
    - Event ID = EV-01
    - Due Date = 10-11-2023 (In this example, Date Format is DD-MM-YYYY)
    - Due Date Action On = Event and its sessions and All LO associated transcripts

- Expected Outcome (Changes in bold. Action only for greatest Registration Number)
    - **Event Transcript Due Date = 10th Nov**
        - Completed Session transcript due date = 1st Dec
        - **Not Completed Session transcript due date = 10th Nov**
    - **Event due date in Curriculum1 = 10th Nov**
    - **Event due date in Curriculum2 = 10th Nov**

Use Case 2: Want to delete due date from Event and all its associations

- Import File:
    - User ID = 123
    - Event ID = EV-01
    - Due Date = DELETE
    - Due Date Action On = Event and its sessions and All LO associated transcripts
- Expected Outcome (Changes in bold. Action only for greatest Registration Number)
    - **Event Transcript Due Date = NO DUE DATE**
        - Completed Session transcript due date = 1st Dec
        - **Not Completed Session transcript due date = NO DUE DATE**
    - **Event due date in Curriculum1 = NO DUE DATE**
    - **Event due date in Curriculum2 = NO DUE DATE**

The Due Date change can be seen in the following places:

1. Event Transcript record (if outside curriculum or not associated to curriculum)
2. Event Training Details page
3. Session Transcript record
4. Session Transcript Details page
5. Curriculum Transcript Details page

Implementation

This functionality is automatically enabled for existing Edge Import customers. The Template Guide in Edge Import will be available to support this new load type.

Access to the new load type in Edge Import is controlled by the new *Access LMS - Event Transcripts Update Load* permission, which is automatically granted to the default System Administrator role for existing Edge Import customers. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Feed and Bulk API methods of import are not currently supported for this new load type.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Access LMS - Event Transcripts Update Load	Grants access to the Event Transcript Update data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import

Edge Import - New Learning Load Type (LO Catalog Update)

When an administrator who has created training leaves an organizational unit (OU), this can impact the ability of other administrators in the OU structure to manage that training if there are constraints applied to catalog management and training permissions in the portal.

With this enhancement, a new LO Catalog Update load is available. This load enables administrators to update the creator of training in the Course Catalog. The Modification History will reflect when the Created By value is modified via Edge Import.

The future vision is to eventually expand this load to update additional course catalog fields that are common across training types.

Implementation

This functionality is automatically enabled for existing Edge Import customers. The Template Guide in Edge Import will be available to support this new load type.

Access to the new load type in Edge Import is controlled by the new *Access LMS - LO Catalog Update Load* permission. The ability to modify the "created by" value for training in the LO Catalog Update data load is controlled by the new *Edge Import Learning - Modify Training Creator* permission. These permissions are automatically granted to the default System Administrator role for existing Edge Import customers. Administrators must grant these permissions to other roles if necessary.

Feed and Bulk API methods of import are not currently supported for this new load type.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - LO Catalog Update Load	Grants access to the LO Catalog Update data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Import Learning - Modify Training Creator	Grants the ability to modify the "created by" value for training in the LO Catalog Update data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - New Performance Load Types (Competency Loads)

With this release, a new Competency Bank load is available in Edge Import. This load type enables administrators to load Competency general information or associate Behaviors or Items to Competencies.

Considerations

Competency Bank Training, Feedback, and Development Actions are not supported. Localization is not supported.

Frequently Asked Questions (FAQs)

Why don't I see loaded competencies using Edge Import in the system interface?

Competencies are not visible in the system until Items or Behaviors are associated with the Competency.

Competency Category Type does not display all available categories in the template.

The template only includes active categories for Competency Category Types.

Why can't I update some competencies?

The Edge Import Competency load cannot update a Competency if the Competency is associated with a locked Skills Matrix role or contained within a model used in a locked Task or Checklist.

Implementation

This functionality is automatically enabled for existing Edge Import customers. The Template Guide in Edge Import will be available to support this new load type.

Access to the new load type in Edge Import is controlled by the new *Edge Import - Competency Bank Load* permission. This permission is automatically granted to the default System Administrator role for existing Edge Import customers. Administrators must grant these permissions to other roles if necessary.

Feed and Bulk API import methods are not currently supported for this new load type.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Import - Competency Bank Load	This permission enables administrators to load competency data via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - Online Course Assets Load Feed

With this enhancement, organizations can load new online course assets in the portal via a recurring feed in Edge Import.

The Online Course Assets Load Feed includes the following key features:

- Reusable feed configuration
- Easy to turn the feed on and off
- API error reports in the customer's FTP location
- Customized scheduler
- Can set email notifications on all stages of the feed run
- Support for AICC, SCORM, and XAPI content files

Considerations

Course reversioning is not supported.

Implementation

This functionality is automatically enabled for existing Edge Import customers. The Template Guide for the Online Course Assets load is available from the Edge Import homepage.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Online Course Assets Feed	Grants access to the Online Course Assets data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - Requisition Template Load Enhancement

Edge Import Requisition Template load is a powerful tool that allows organizations to manage their requisition templates in bulk. Administrators can easily and intuitively upload data into the Cornerstone system, reducing the need to insert or update individual records manually.

With this enhancement, when using Requisition Template ID as the primary identifier, administrators can update any fields of a requisition template in Edge Import without providing an internal and external description each time even when they are not being updated. The Internal Description and External Description fields are optional when using Requisition Template ID as the primary identifier. This enhancement also applies to translation loads.

Implementation

This functionality is automatically enabled for existing Edge Import customers. The Template Guide in Edge Import will be updated to reflect this enhancement.

Permissions

The following existing permissions apply to this functionality:

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

This enhancement makes the existing Edge Import transcript load permissions constrainable for an additional level of access control. The constraints apply to manual loads, manual feed runs, and bulk API loads.

The following permissions can now be constrained by OU and Provider:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Curriculum Transcripts Load	Grants access to the Curriculum Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. 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 can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - Material Transcripts Load	Grants access to the Material Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Load	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - Online Transcripts Load	Grants access to the Online Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - Test Transcripts Load	Grants access to the Test Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import
Access LMS - Video Transcripts Load	Grants access to the Video Transcripts data load via Edge Import. This permission can be constrained by OU and Provider. This is an administrator permission.	Edge Import

The following permissions can now be constrained by OU:

Access LMS - Certification Transcript Update Load	Grants access to the Certification Transcript Update data load via Edge Import. This permission can be constrained by OU. This is an administrator permission.	Edge Import

Access LMS - External Training Load	Grants access to the External Training data load via Edge Import. This permission can be constrained by OU. This is an administrator permission.	Edge Import

Impact on Transcript Feed Import

- Transcript feed permissions cannot be constrained.
- Scheduled feeds are run by the system and do not respect any constraints.
- Manual feeds must be run by an administrator. The administrator's load permission constraints are respected.

Impact on Bulk API Transcript Import

- Bulk API Transcript permissions cannot be constrained.
- An administrator's information is used to authenticate and call the transcript Bulk API for bulk import. The administrator's load permission constraints are respected.

Implementation

This functionality is automatically enabled for existing Edge Import customers. Edge Import customers can optionally apply the constraints to the Edge Import transcript load permissions. By default, no constraints are applied.

Edge Import Online Content (OLCO) Integration Solution

A new 1:1 Content Integration solution is now available for content vendors who prefer file-based content integrations over an API-based content integration. This integration solution also allows syncing content from a content provider and Online Content (OLCO) transcripts. The Online Content (OLCO) load, which is new with this integration, supports creating and updating content from approved domains. Both manual and automated scheduled feeds are supported. Once the integration solution is purchased, the new Online Content (OLCO) load is available.

The Edge Import OLCO Integration Solution includes the following:

- Online Content (OLCO) Feed (new load type)
    - Create new online content by providing new unique Online Content ID values
    - Update existing online content by providing an existing Online Content ID or Learning Object ID
    - Only import content if the vendor URL matches the approved content vendor list, which is configured during activation
    - Perform manual one-time loads or set up a feed to automate the import of Online Content files
- Online Content (OLCO) Transcript Feed (available today)
    - Import learner's registration and completion transcripts
    - Perform manual one-time loads or set up a feed to automate the import of Online Content Transcript files

Benefits for Customer:

- File-based integration solution for content vendors that prefer this method
- Self-serviceable solution
- Edge Import product experienced customers would find it easy to learn and implement this new OLCO integration solution

Benefit for Content Vendor:

- Repeat Value – Following the initial implementation of this integration, content vendors can reuse the knowledge gained to integrate their content with other mutual customers already using Cornerstone Learning CSX
- Market Ready for content integration with other CSX customers

This functionality is not available during UAT.

Frequently Asked Questions (FAQs)

Does Edge Import need to be purchased to use this solution?

Yes, if the customer has not yet purchased Edge Import, they will need to purchase Edge Import.

What is the difference between the Online Content (OLCO) Metadata load and the new Online Content (OLCO) load?

The Online Content (OLCO) Metadata load is used to make edits to the CSX catalog-related fields.

- Target User: Customer or Partner Administrator
- Access to this load is granted by purchasing Edge Import.

The new Online Content (OLCO) load is used to create and update Online Content metadata delivered from a third-party content provider through a subscription but hosted on the Content Provider's servers. This type of training is displayed on the CSX Course Catalog page.

- Target User: Customer Administrator
- Access to this load is granted by purchasing the Edge Import OLCO Integration.

Implementation

This functionality is enabled in two steps:

1. The customer and vendor agree on content licensing.
2. The customer contacts their Account Manager to initiate onboarding and purchase this integration solution.

This functionality is not available during UAT.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Online Content (OLCO) Feed	Grants access to the Online Content (OLCO) data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Online Content (OLCO) Load	Grants access to the Online Content (OLCO) data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Integrations and APIs

ADP Workforce Now Integrations - Display ADP Correlation ID

With this enhancement, the ADP Correlation ID is displayed in the OU sync email notification and user sync log for the following integrations:

- Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace U.S.)
- Cornerstone Learning Connector for ADP Workforce Now (ADP Marketplace Canada)
- Cornerstone Learning Connector for ADP Workforce Now Next Generation

This enhancement streamlines the support process between ADP and Cornerstone by exposing ADP's Correlation ID so customers can provide this unique ID to ADP when submitting support tickets.

This functionality is available with the December 1 patch.

Implementation

This functionality is automatically implemented for all organizations.

This functionality is available with the December 1 patch.

Permissions

The following existing permissions apply to this functionality:

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

Google OAuth Inbound SSO

The Google OAuth Inbound SSO (Single Sign-on) connection is available to customers for a seamless user login experience to their Cornerstone CSX portal. This self-configurable connection is available in the user interface under the Single Sign-On menu in Edge.

This integration includes the following features:

- Hassle-free login experience
- Supports deep link feature
- User-friendly configuration
- Default or customizable Error, Timeout, and Logout URLs

How Does this Enhancement Benefit My Organization?

This feature provides a self-service plug-and-play SSO connection with less maintenance.

Implementation

There is a two-step process to purchase this functionality:

1. Purchase from Google Marketplace. This requires contacting Google directly to purchase, install, and configure with Google.
2. Contact your Account Manager to purchase the service.

After purchase, the service can be self-activated via Edge (Admin > Tools > Edge > Single Sign On). Select the new oAuth option and click “Add” to get to the setup screen. The setup requires Client ID and Client Secret parameters from Google. This connection does not support E-signature and mobile app connectivity.

Field Configuration Details - General Properties

FIELD NAME	FIELD DESCRIPTION	REQUIRED?
SSO ID	Pre-filled with the next available OUID on the portal. This can be updated to another available value.	Yes
Client ID	Provided by Google	Yes
Client Secret	Provided by Google	Yes
Error URL	The Cornerstone error URL (common/ssoerror.aspx) is configured by default. A custom URL is also accepted.	If left blank, this defaults to the Cornerstone URL.
Logout URL	The Cornerstone logout URL (common/ssologout.htm) is configured by default. A custom URL is also accepted.	If left blank, this defaults to the Cornerstone URL.
Timeout URL	The Cornerstone timeout URL (common/ssotimeout.htm) is configured by default. A custom URL is also accepted.	If left blank, this defaults to the Cornerstone URL.
Skew (seconds)	The default value is -10, and the maximum value is -20.	Yes

Field Configuration Details - Contacts

FIELD NAME	FIELD DESCRIPTION	REQUIRED?
Name	Update the customer’s Technical and System Administrator name.	Yes
Email	Update the customer’s Technical and System Administrator email address.	Yes

SOAP API Deprecation in 2023 Q4

All Cornerstone SOAP APIs, except Transcript APIs (/webservices/LMS/LOWS.asmx), will be deprecated in Q4 of 2023 on December 1. This will impact only a subset of API customers.

UltiPro and Kronos Integrations - Update to UKG Branding

Cornerstone partners Ultimate Software and Kronos Inc. have merged and are now called Ultimate Kronos Group (UKG). The integration titles are updated in Edge Marketplace, Edge Integrations, Edge Settings, and the sync email notifications to align with UKG's new branding and product names.

PREVIOUS INTEGRATION TILE	POST-RELEASE INTEGRATION TILE
Ultimate Software's UltiPro Core Data Inbound Integration	UKG Pro™ User & OU Data Inbound Integration
Ultimate Software's UltiPro Single Sign-on (SSO) to Cornerstone	UKG Pro™ Single Sign-on to Cornerstone
Ultimate Software's UltiPro Transcript Outbound Integration	UKG Pro™ Transcript Data Outbound Integration
Kronos Workforce Dimensions Employee Dashboard Tile	UKG Pro Workforce Management™ Employee Dashboard Tile
Kronos Workforce Ready Core Data Inbound Integration	UKG Ready™ User & OU Data Inbound Integration
Kronos Workforce Ready Time & Attendance	UKG Ready™ Time & Attendance Integration

This functionality is available with the December 1 patch.

Implementation

This functionality is automatically implemented for all organizations.

This functionality is available with the December 1 patch.

Permissions

The following existing permissions apply to this functionality:

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

Webhooks (Early Adopter) Enhancements

In this release, content encoding is implemented to improve throughput for all subscriptions to event-driven notifications through Webhooks, providing more timely execution of the business process. Edge Import LMS Events are added to ensure all Learning Assignment and Completion events are published through the Webhook.

Webhooks were introduced in the July ’23 Release as an Early Adopter feature. With the November ’23 Release, the Webhooks functionality continues to be available to customers in the Early Adopter phase with additional functionality included.

What are Webhooks?

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

Why use Webhooks?

Webhooks provides the following:

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

New Features for the November '23 Release

The following key features are added with this release:

- Added Content Encoding to improve the speed of data throughput
- Added Edge Import LMS Events to the Training Webhook to ensure all Learning Assignment and Completions are received

What’s Next

The following enhancements will be delivered in future releases:

- Feature hardening for the General Availability deployment
- Support of infrastructure tiering to support business process requirements
- Establish notifications based on a Status Webhook

Implementation

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

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

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

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

Set up a Webhook

To set up a webhook, you must first create an endpoint to link your hosted URL and the webhook.

Then, create a webhook to begin publishing events to your endpoint.

See Webhooks (Early Adopter) - Overview.

Permissions

The following existing permissions apply to this functionality:

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

Mobile Enhancements

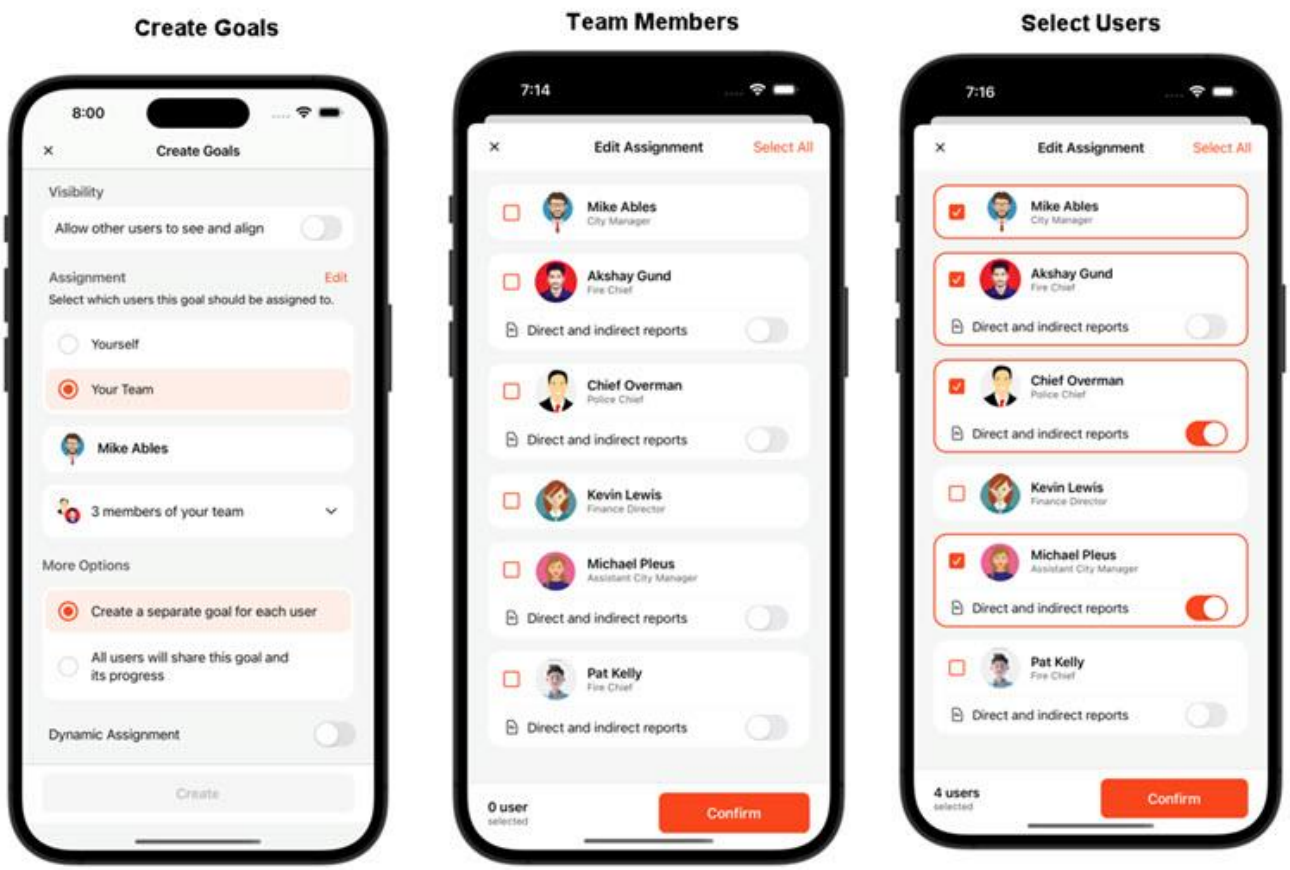
Cornerstone CSX App – Goals Enhancements

With this release, a new My Goals module is now part of the Cornerstone CSX mobile app. My Goals allows managers to create, edit, and update goals, tasks, and targets.

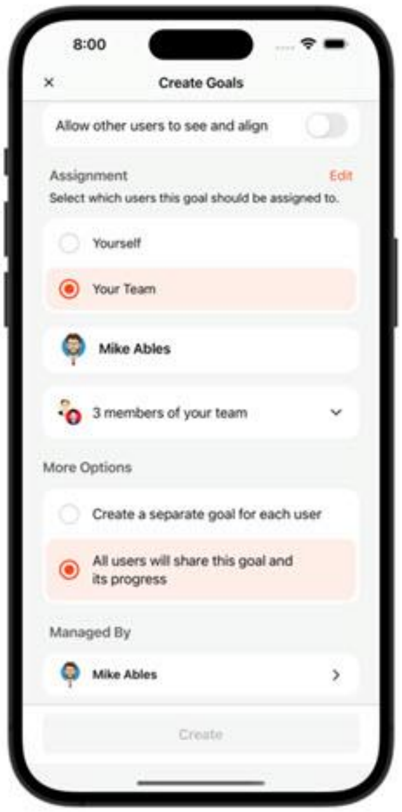
Users can also add and edit comments in the app with goals attachments.

My Goals App Screens

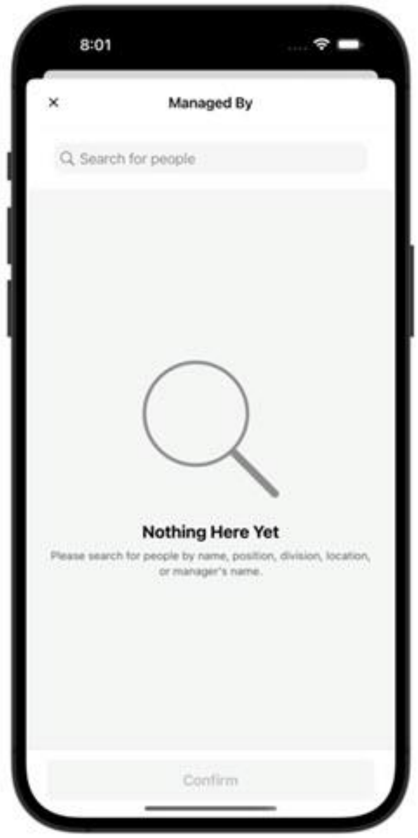
Images below display the goal screens in the My Goals module.



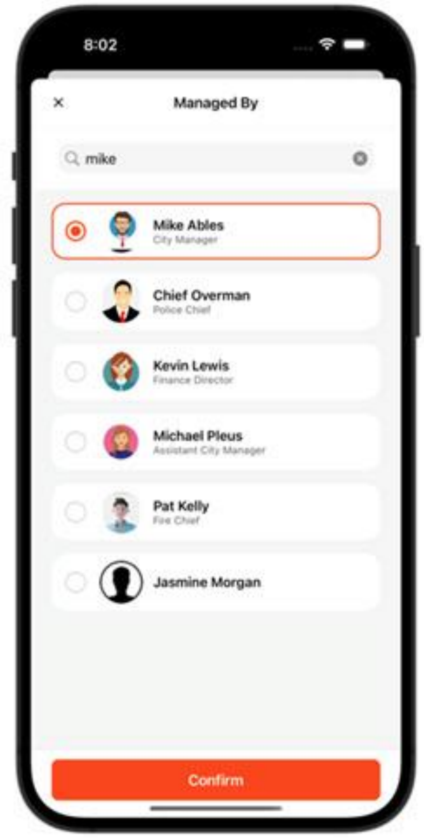
Shared Goal



Search



Select Goal Owner



Cornerstone CSX App – Offline Support for Course Videos

Learners often have limited internet access, especially while traveling or in areas with poor connectivity.

With this release, learners can now download course videos while online, then access and consume content at their convenience while offline. When learners come back online, the information is automatically synced.

Most video formats can be downloaded, but only ".mp4" and ".m4v" can be played inline. Other formats must be opened in external apps that support video playback.

Modernize Cornerstone CSX App

With this release, the Cornerstone CSX mobile app has a new simplified design to provide a premium and intuitive experience for users.

Updated Screens

The following screens are updated:

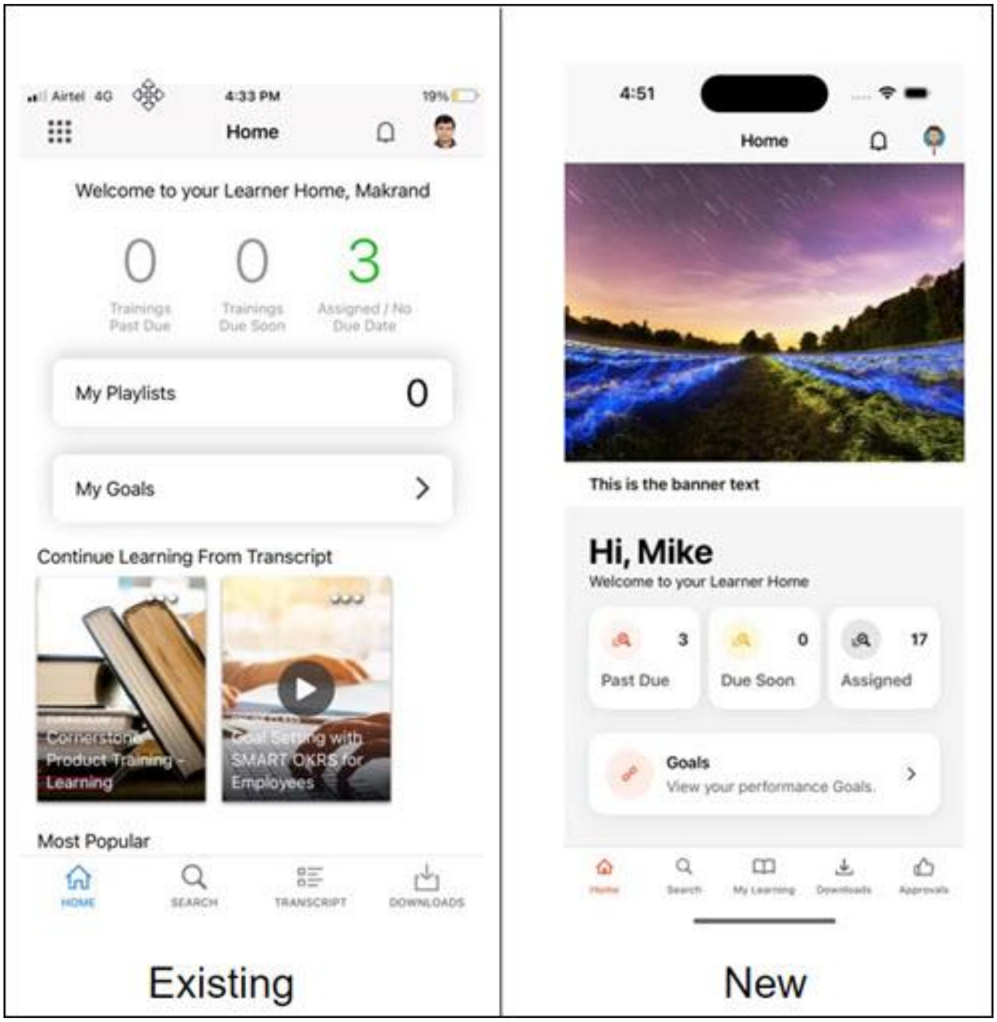
- Home Screen
- My Learning
- Search
- Curriculum
- Playlist
- Downloads

Additionally, there are two new search module features:

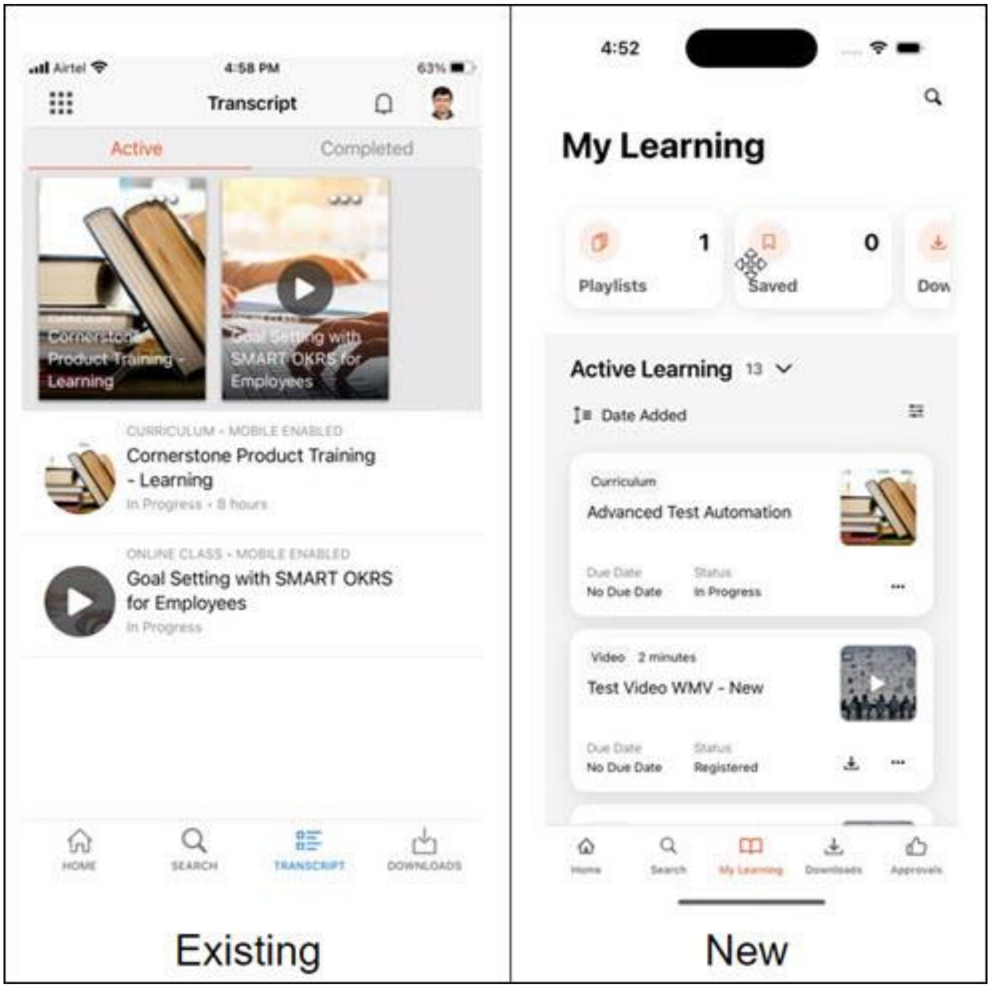
- Recently Viewed - Displays 5 recently viewed items.
- Search History - Displays five recent search phrases.

The user can remove items from both sections.

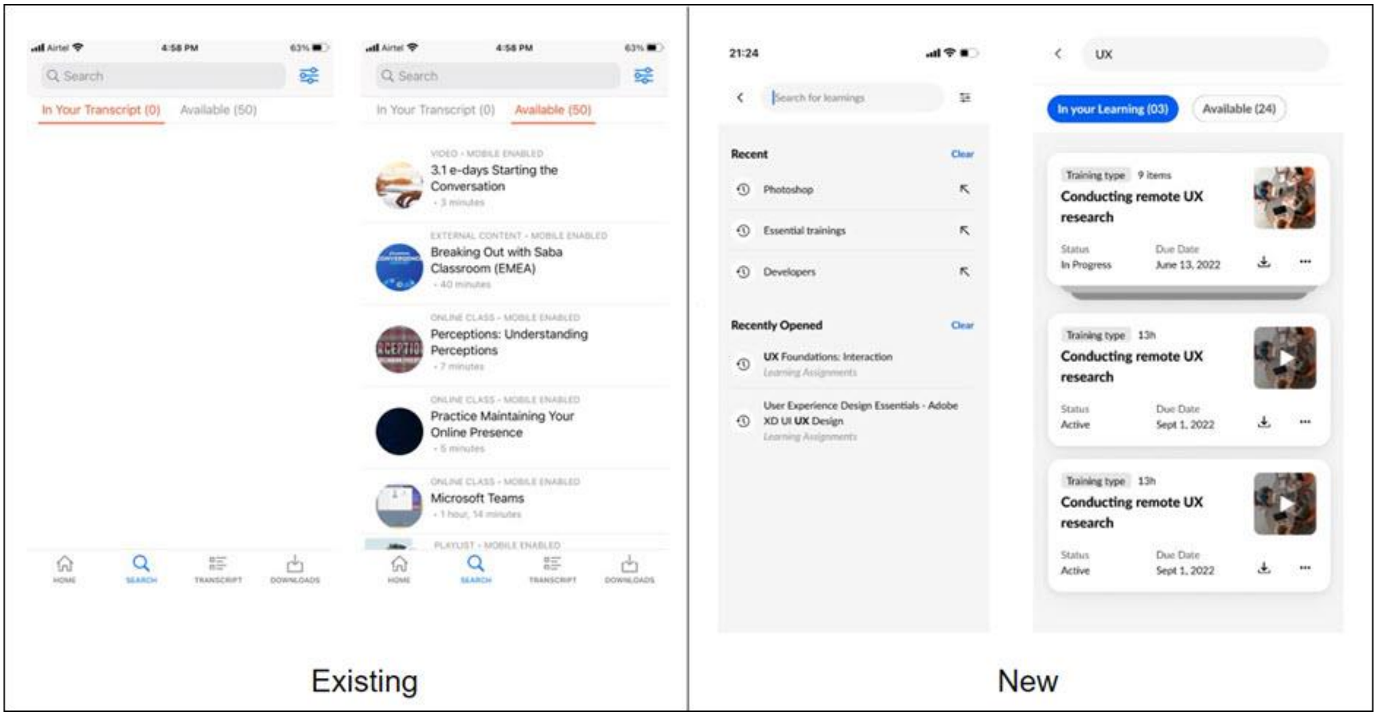
Home Screen


Airtel 4G
4:33 PM
19%
Home
Welcome to your Learner Home, Makrand
0
Trainings Past Due
0
Trainings Due Soon
3
Assigned / No Due Date
My Playlists
0
My Goals
Continue Learning From Transcript
Cornerstone Product Training - Learning
Goal Setting with SMART OKRS for Employees
Most Popular
HOME
SEARCH
TRANSCRIPT
DOWNLOADS
Existing
4:51
Home
This is the banner text
Hi, Mike
Welcome to your Learner Home
3
Past Due
0
Due Soon
17
Assigned
Goals
View your performance Goals.
Home
Search
My Learning
Downloads
Approvals
New

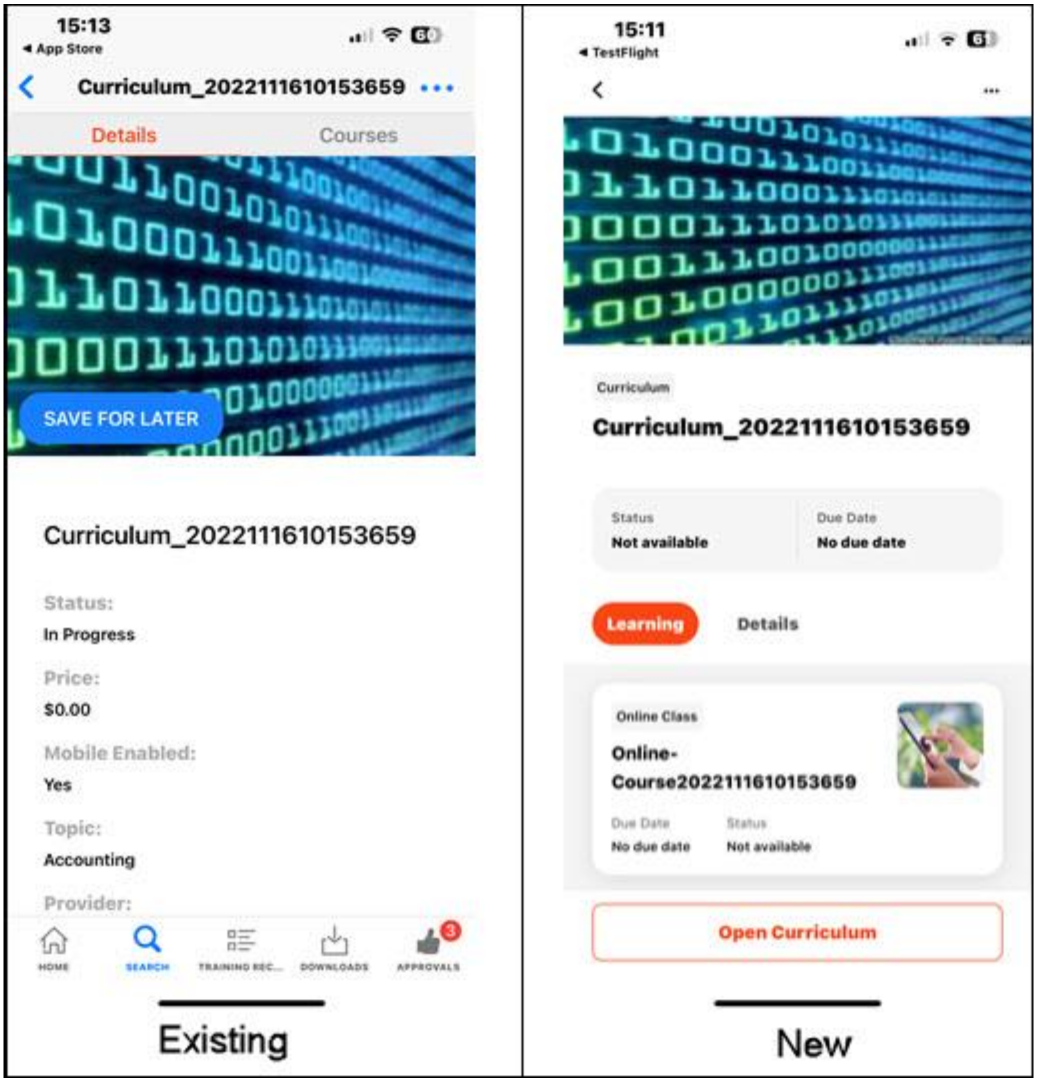
My Learning


Airtel
4:58 PM
63%
Transcript
Active
Completed
CURRICULUM - MOBILE ENABLED
Cornerstone Product Training - Learning
In Progress - 8 hours
ONLINE CLASS - MOBILE ENABLED
Goal Setting with SMART OKRS for Employees
In Progress
HOME
SEARCH
TRANSCRIPT
DOWNLOADS
Existing
4:52
My Learning
Playlists 1
Saved 0
Active Learning 13
Date Added
Curriculum
Advanced Test Automation
Due Date
No Due Date
Status
In Progress
Video 2 minutes
Test Video WMV - New
Due Date
No Due Date
Status
Registered
Home
Search
My Learning
Downloads
Approvals
New

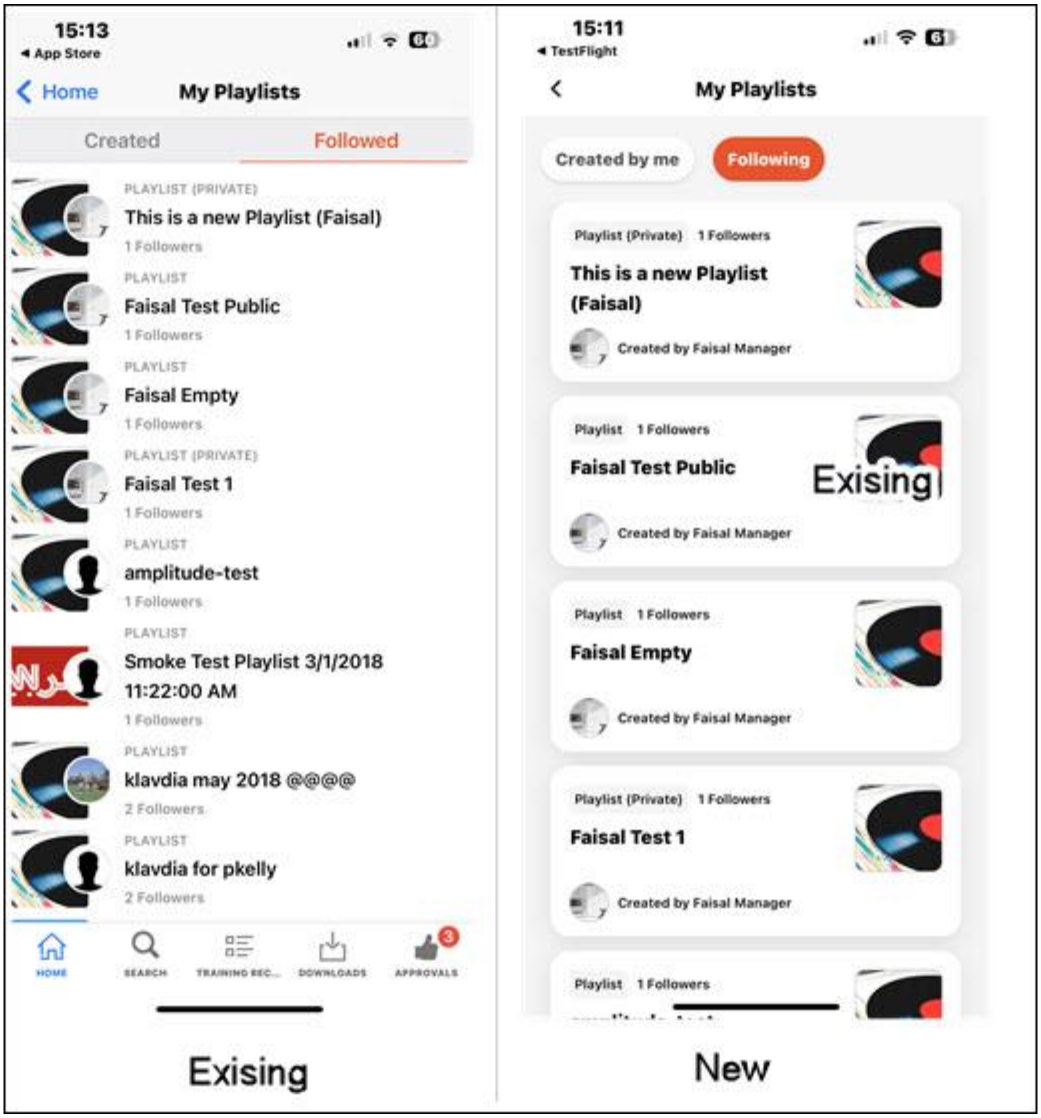
Search



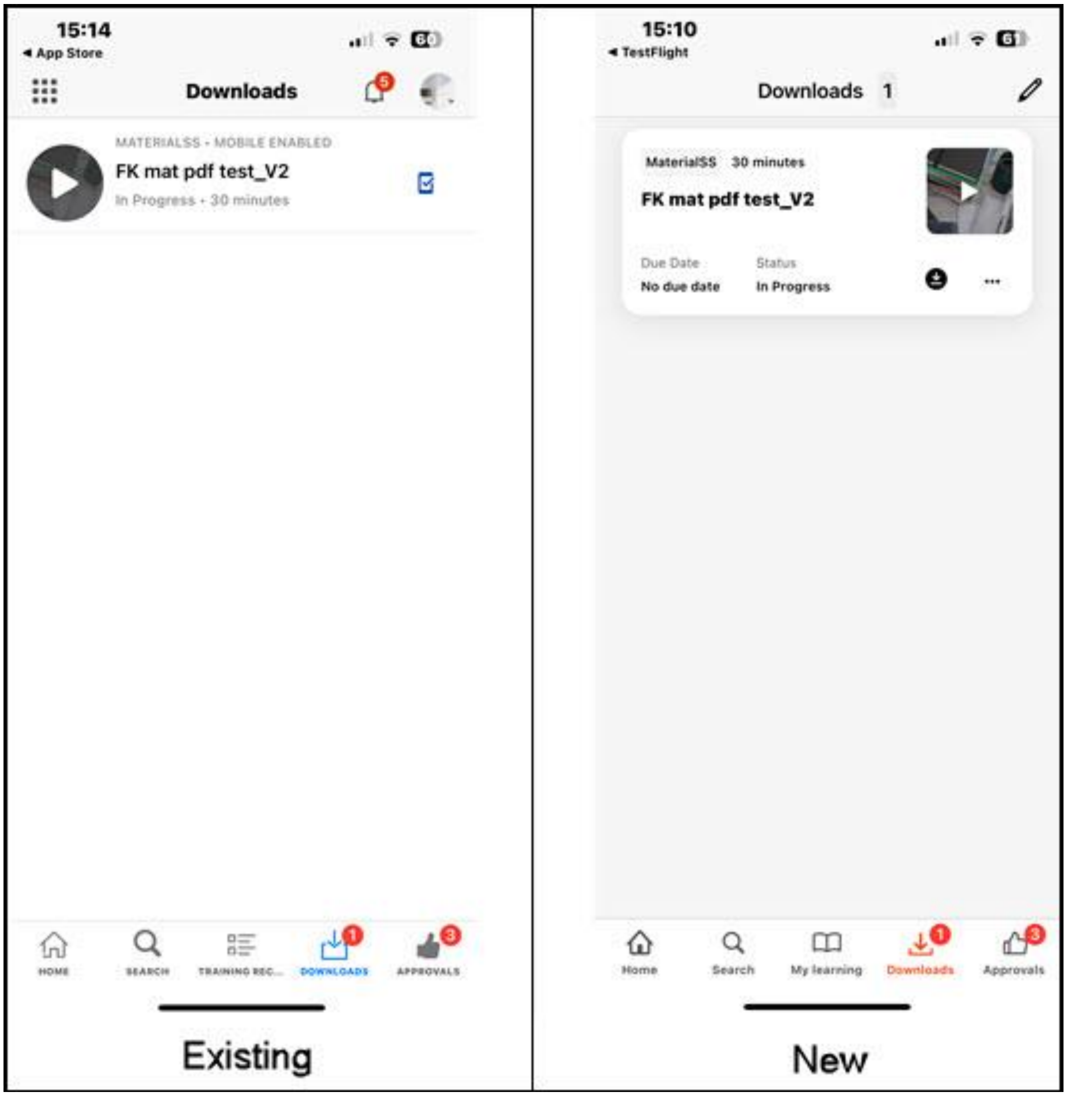
Curriculum


15:13
◂ App Store
Curriculum_2022111610153659
Details
Courses
SAVE FOR LATER
Curriculum_2022111610153659
Status:
In Progress
Price:
$0.00
Mobile Enabled:
Yes
Topic:
Accounting
Provider:
HOME
SEARCH
DOWNLOADS
APPROVALS
Existing
15:11
◂ TestFlight
Curriculum
Curriculum_2022111610153659
Status
Not available
Due Date
No due date
Learning
Details
Online Class
Online-
Course2022111610153659
Due Date
No due date
Status
Not available
Open Curriculum
New

Playlist


15:13
App Store
Home
My Playlists
Created
Followed
PLAYLIST (PRIVATE)
This is a new Playlist (Faisal)
1 Followers
PLAYLIST
Faisal Test Public
1 Followers
PLAYLIST
Faisal Empty
1 Followers
PLAYLIST (PRIVATE)
Faisal Test 1
1 Followers
PLAYLIST
amplitude-test
1 Followers
PLAYLIST
Smoke Test Playlist 3/1/2018 11:22:00 AM
1 Followers
PLAYLIST
klavdia may 2018 @@@@
2 Followers
PLAYLIST
klavdia for pkelly
2 Followers
HOME
SEARCH
TRAINING REC...
DOWNLOADS
APPROVALS
Exising
15:11
TestFlight
My Playlists
Created by me
Following
Playlist (Private) 1 Followers
This is a new Playlist (Faisal)
Created by Faisal Manager
Playlist 1 Followers
Faisal Test Public
Exising
Created by Faisal Manager
Playlist 1 Followers
Faisal Empty
Created by Faisal Manager
Playlist (Private) 1 Followers
Faisal Test 1
Created by Faisal Manager
Playlist 1 Followers
New

Downloads



15:14
App Store
Downloads
MATERIALSS • MOBILE ENABLED
FK mat pdf test_V2
In Progress • 30 minutes
HOME
SEARCH
TRAINING REC...
DOWNLOADS
APPROVALS
Existing
15:10
TestFlight
Downloads 1
MaterialSS 30 minutes
FK mat pdf test_V2
Due Date
No due date
Status
In Progress
Home
Search
My learning
Downloads
Approvals
New

Reporting 2.0

Reporting 2.0 - Auto-Disable Daily Schedules for Unused Reports

Many reports are scheduled to run daily with no delivery associated that users do not access. These reports take up valuable system resources to run daily, generating and storing report snapshots that are never accessed.

With the November ’23 Release, the system tracks the last accessed date for each scheduled snapshot of all owners and shared users associated with the report. If a scheduled report snapshot has not been accessed for 30 calendar days by any of the associated users, the system will automatically disable the schedule associated with it. This enhancement improves system performance and optimizes resource usage.

* The count for 30 days begins after the November '23 Release

When a scheduled report is disabled due to inactivity, the **Queue this report on a schedule** option is turned off. When a user accesses the snapshot for a report with a schedule that has been turned off, the system automatically enables the schedule for that specific report, ensuring that the enabling and disabling of schedules is based on user interactions. Users with edit access to the report can manually set up the scheduling options again.

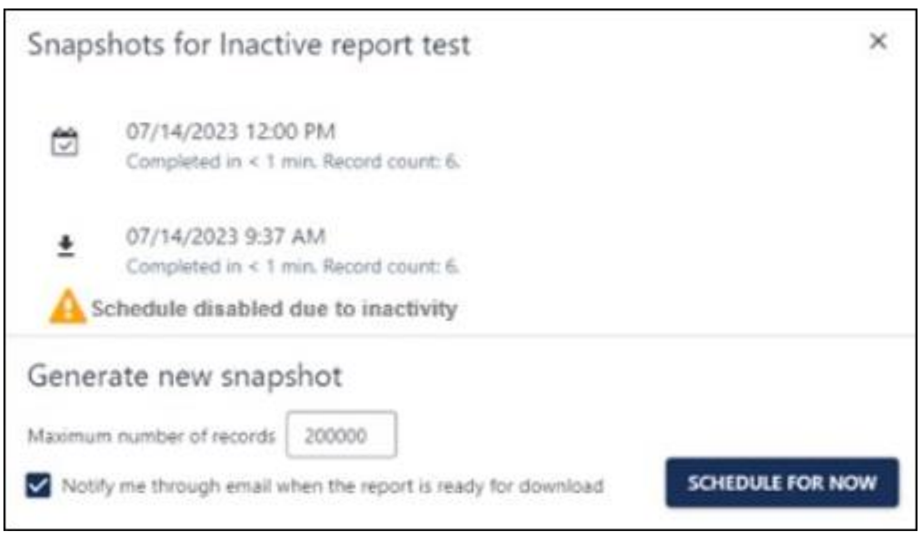
This enhancement only applies to reports scheduled to run daily without any email or FTP delivery associated with it.

A report snapshot is considered accessed when any of the following occurs:

- The scheduled snapshot is downloaded
- A dashboard associated with the report is accessed
- A dashboard widget associated with the report is refreshed, downloaded, or chart details are viewed

A report snapshot is not considered accessed when the report is viewed in the Report Viewer or when a non-scheduled snapshot for the report is manually generated or downloaded.

To help identify auto-disabled reports, a warning sign with a notification text appears in the report designer and the snapshot pop-up on the landing page and viewer page.

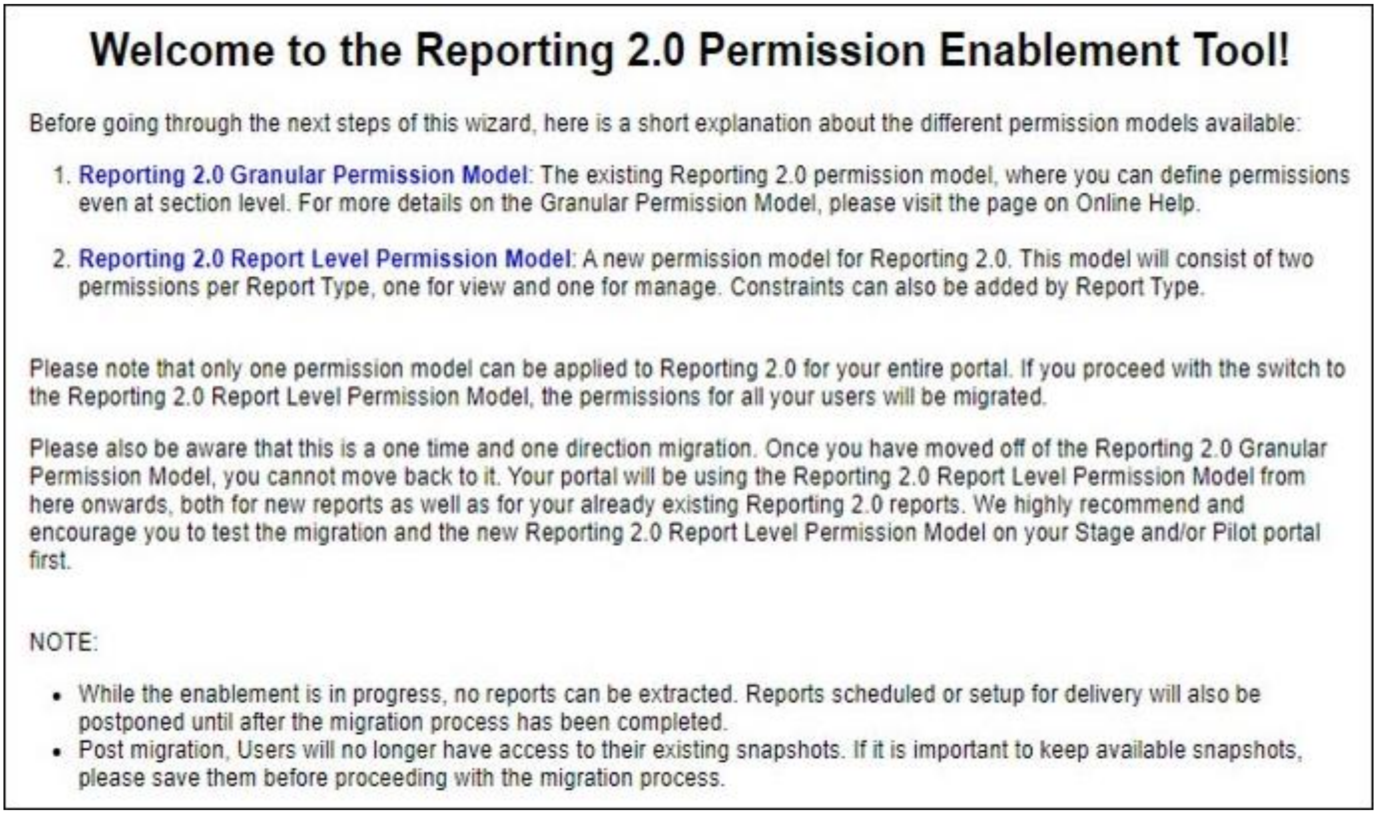


Implementation

This functionality is automatically enabled for all organizations.

Reporting 2.0 - Permissions Enablement Tool UI Update

With the November ’23 Release, all references of the Custom Reports permission model are removed from the welcome page of the Permissions Enablement tool. The Permissions Enablement Tool UI no longer displays options to migrate from Custom Report permissions and constraints, and the tool description is updated.



Welcome to the Reporting 2.0 Permission Enablement Tool!

Before going through the next steps of this wizard, here is a short explanation about the different permission models available:

1. Reporting 2.0 Granular Permission Model: The existing Reporting 2.0 permission model, where you can define permissions even at section level. For more details on the Granular Permission Model, please visit the page on Online Help.
2. Reporting 2.0 Report Level Permission Model: A new permission model for Reporting 2.0. This model will consist of two permissions per Report Type, one for view and one for manage. Constraints can also be added by Report Type.

Please note that only one permission model can be applied to Reporting 2.0 for your entire portal. If you proceed with the switch to the Reporting 2.0 Report Level Permission Model, the permissions for all your users will be migrated.

Please also be aware that this is a one time and one direction migration. Once you have moved off of the Reporting 2.0 Granular Permission Model, you cannot move back to it. Your portal will be using the Reporting 2.0 Report Level Permission Model from here onwards, both for new reports as well as for your already existing Reporting 2.0 reports. We highly recommend and encourage you to test the migration and the new Reporting 2.0 Report Level Permission Model on your Stage and/or Pilot portal first.

NOTE:

- While the enablement is in progress, no reports can be extracted. Reports scheduled or setup for delivery will also be postponed until after the migration process has been completed.
- Post migration, Users will no longer have access to their existing snapshots. If it is important to keep available snapshots, please save them before proceeding with the migration process.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting 2.0 Permissions Enablement Tool	Grants access to the Reporting 2.0 Permission Enablement Tool. This permission cannot be constrained. This is an administrator permission.	Reporting

Reporting 2.0 - Shared Reports Filter Behavior

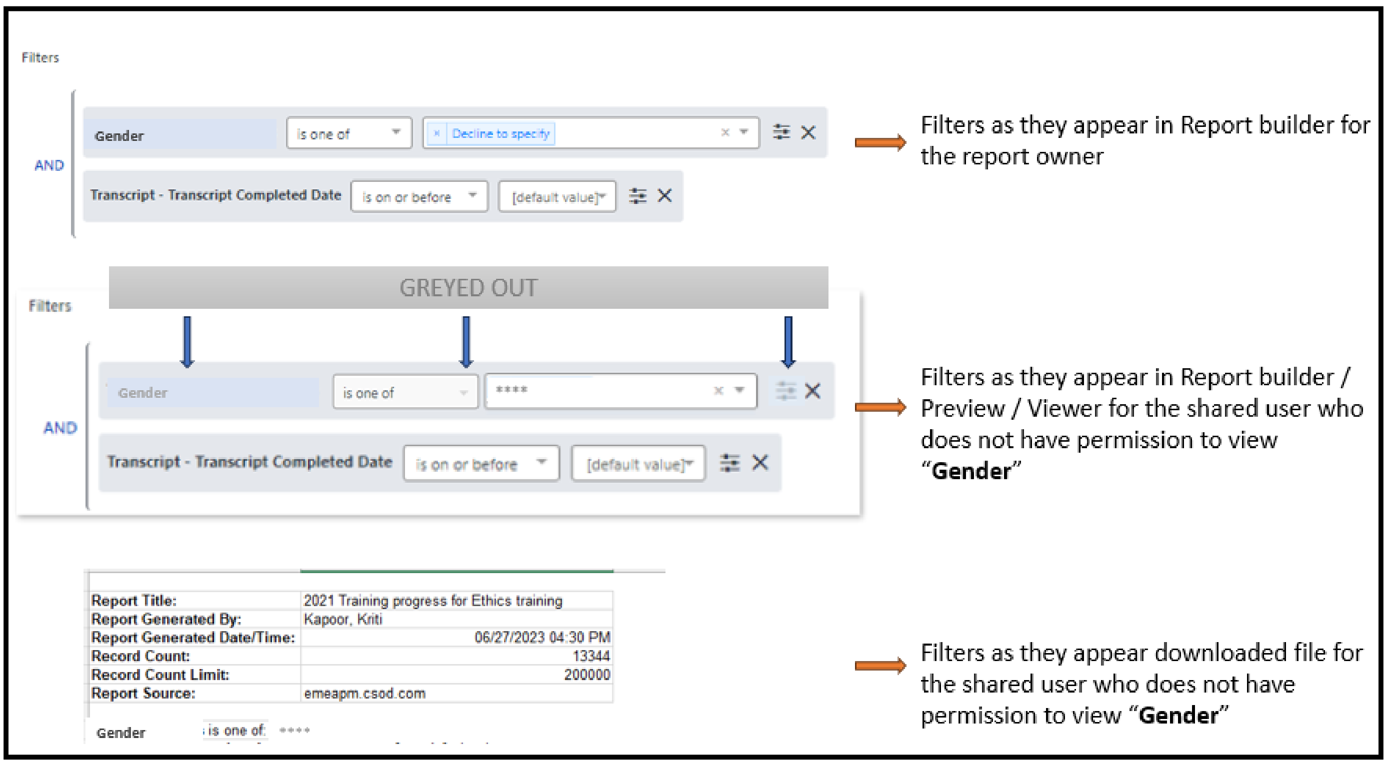
Before this enhancement, when a report owner shared a report with a user who lacked the necessary permissions for fields used in filters, the shared user gained access to more data than intended. ***Note:*** *Users have never been able to see more than their permissions and constraints allow.*

With this enhancement, the shared user only has visibility into data that strictly aligns with the filters applied by the report owner. This applies to reports that are created after the release. Existing reports will continue to behave as-is.

This enhancement applies to custom fields availability and all fields in the Special permissions category, including User Upload - Ethnicity, User Upload - Gender, and Grades - View.

This enhancement has the following impact on shared users:

- Filter names for restricted fields are visible but non-interactive, with associated filter values and operators hidden and grayed out.
- Shared users cannot edit or modify these filters, regardless of whether they have view or edit report sharing permissions.
- Shared users can delete these filters if they have edit permissions on the shared report.
- Restricted field filter names display in Report Designer Preview, Report Viewer, and downloaded files, while filter values remain hidden and greyed out.



Implementation

This functionality is automatically enabled for all organizations.

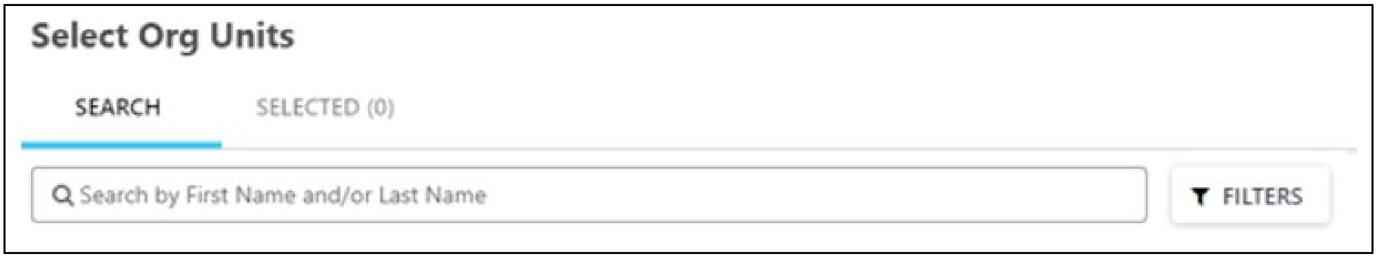
Reporting 2.0 - User and Training Flyouts Start with Empty Search

Before this enhancement, the user/organizational unit (OU) and training flyouts loaded the entire list of users/OUs and training to select from, which resulted in large amounts of data being loaded and displayed.

With this enhancement, when initially opened, the user and training flyouts no longer display full data lists to improve page load times. Instead, the flyouts load without prepopulated results to provide a clean interface that dynamically updates and displays only the selected information. Users are required to input search parameters to initiate the search process. When a user has selected or saved information for the flyout, the selected information is displayed when accessing it again.

This enhancement applies to user and training flyouts in filter and filter properties of the report designer page and to the user flyout while sharing and scheduling the report from the landing page and the report designer.

The experience when selecting an OU from the flyout is unchanged; the entire list will load once an OU type is selected from the Org Unit picker in the flyout.



Implementation

This functionality is automatically enabled for all organizations.

Reporting 2.0 New Fields - November 2023

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

- **Reporting Fields - Learning**
- **Reporting Fields - Performance**
- **Reporting Fields - Position Management**

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. A consolidated **list of Data Exporter API objects that currently support OData Delta/Change Tracking** is maintained in the **RTDW Documentation for Reporting API, RDW, and Data Exporter Community**. Join and follow the community to be notified of new objects with Delta support.

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

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

Documentation that describes RTDW views and fields used in Custom Reports will be updated for the November '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 portals as of October 18 and in production portals with the release on November 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 - Changes Scheduled for November '23 Release

The following items are scheduled for deprecation:

OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
training_part_core	training_part2_core	Release 24.03.00 (Nov 2024)	Marked for deletion
applicant	job_application_core job_application_disposition_local_core job_application_submission_source_core	Release 24.03.00 (Nov 2024)	Marked for deletion
COMPATIBILITY_eval_question_user_response_local	assessment_evaluation_core assessment_response_core assessment_result_core qna_container_core qna_structure_core qna_question_core qna_answer_bank_core qna_text_local_core	Release 24.03.00 (Nov 2024)	Marked for deletion
COMPATIBILITY_job_requisition_applicant_status_local	job_application_status_local_core	Release 24.03.00 (Nov 2024)	Marked for deletion
COMPATIBILITY_ou_custom_field_text_response_local	ou_cf_text_local_core	Release 24.03.00 (Nov 2024)	Marked for deletion

OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
curriculum_user_info	transcript_core field [progress_percentage] in deprecated [curriculum_user_info] corresponds to field [user_lo_pct_complete] in [transcript_core] for Curriculum objects	Release 24.03.00 (Nov 2024)	Marked for deletion
devplan	devplan_core devplan_training_core devplan_objective_core devplan_status_core devplan_action_step_core devplan_cf_core	Release 24.03.00 (Nov 2024)	Marked for deletion
evaluation	assessment_evaluation_core assessment_response_core assessment_result_core assessment_type_core qna_answer_bank_core qna_container_core qna_correct_answer_core qna_item_audit_core qna_question_category_core qna_question_category_local_core qna_question_core qna_question_type_local_core qna_section_core qna_structure_core qna_text_local_core	Release 24.03.00 (Nov 2024)	Marked for deletion
filter_lo_ou	training_availability_by_ou_core	Release 24.03.00 (Nov 2024)	Marked for deletion
filter_lo_user	training_availability_by_user_core	Release 24.03.00 (Nov 2024)	Marked for deletion

OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
goal	goal_core goal_association_core users_core	Release 24.03.00 (Nov 2024)	Marked for deletion
ou_cf	user_ou_pivoted_core user_ou_core ou_cf_core	Release 24.03.00 (Nov 2024)	Marked for deletion
recruiting	job_requisition_core job_application_workflow_core job_requisition_target_ou_core job_requisition_template_core job_requisition_eeo_category_core compensation_type_local_core job_requisition_employment_type_local_core users_core ou_core	Release 24.03.00 (Nov 2024)	Marked for deletion
requisition_cf	job_requisition_cf_core	Release 24.03.00 (Nov 2024)	Marked for deletion
requisition_location	job_requisition_target_ou_core ou_core	Release 24.03.00 (Nov 2024)	Marked for deletion
test	assessment_test_core assessment_response_core assessment_result_core assessment_type_core qna_answer_bank_core qna_container_core qna_correct_answer_core qna_item_audit_core qna_question_category_core qna_question_category_local_core	Release 24.03.00 (Nov 2024)	Marked for deletion

OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
	qna_question_core qna_question_type_local_core qna_section_core qna_structure_core qna_text_local_core		
training_schedule	training_part2_core training_part_attendance_core address_core timezone_core training_core users_core ou_core	Release 24.03.00 (Nov 2024)	Marked for deletion
transaction	training_purchase_core training_purchase_line_item_core training_purchase_payer_core	Release 24.03.00 (Nov 2024)	Marked for deletion
transaction_address	training_purchase_core	Release 24.03.00 (Nov 2024)	Marked for deletion
transaction_tax	training_purchase_line_item_core	Release 24.03.00 (Nov 2024)	Marked for deletion
transcript	transcript_core	Release 24.03.00 (Nov 2024)	Marked for deletion
user	users_core	Release 24.03.00 (Nov 2024)	Marked for deletion
user_ou_info	user_ou_pivoted_core ou_core	Release 24.03.00 (Nov 2024)	Marked for deletion
user_ou_status	user_ou_status_local_core	Release 24.03.00 (Nov 2024)	Marked for deletion

The following changes are scheduled:

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

RTDW - Changes Scheduled for November '23 Release

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

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

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

Learning

Learning Enhancements

Ability to Revert ILT Sessions Inside Curricula (Early Adopter)

Ability to Revert ILT Sessions Inside Curricula (Early Adopter)

Prior to this enhancement, there was no way to revert ILT session completions if the ILT had a relationship to pre-work, post-work, prerequisites, programs and cohorts, certifications, or curricula. The erroneous completion of such ILT sessions could result in a compliance breach.

With this enhancement, the administrators can revert ILT session completions where the ILT is part of one or more curricula.

The enhancement comes with the following functionalities:

- The revert option is displayed on the roster if the session is part of one or more curricula.
- A revert confirmation message is prompted before submitting a revert request.
- The Revert Status column displays the current status of the revert.
- A new filter on the roster page to show only Reverted users.
- A new security permission to restrict which administrators can revert curricula-related sessions.
- The updated curriculum transcript history shows curriculum updates caused by a reverted session.

How Does this Enhancement Benefit My Organization?

- Reverting a session completion where the session is part of one or more curricula triggers the curriculum to recalculate progress.
- Ensures data accuracy of employees if a session completion was submitted in error.
- The revert actions are audited in the learner’s transcript history.
- The learners can see the updated curriculum progress, transcript status, and transcript history when a session marked as attended in error is reverted.
- It enhances the administrator's application usability by creating a flexible environment.

Use Case

Session A and Curriculum A were completed. When Session A is reverted, Curriculum A will move from ‘’Completed’ to 'In Progress,' and the curriculum completion progress will be recalculated. An entry in Transcript History will be added to note the session revert and curriculum reprocessing.

Considerations

- This enhancement only supports the ability to revert a session completion where sessions are part of the curricula. It does not revert ILT session completions if the ILT relates to prework, postwork, prerequisites, programs, cohorts, or certifications.
- Suppose a learning object inside a curriculum had moved from ‘Pending Prior Training’ to another status because the session was completed. In that case, the learning object does not move back to ‘Pending Prior Training’ and retains its current status.
- If a curriculum is removed, the session revert is allowed, and the removed curriculum is reprocessed to support the restored curriculum to the learner.
- An inactive curriculum can be reverted. If the session is part of three curricula, one inactive and two active, all three curricula will be reprocessed. Please also note that if an inactive curriculum is on the Archived tab due to transcript preference rules or being manually moved, the inactive curriculum will remain on the Archived tab even if the ILT session is reverted.
- Reverting a session that is part of a curriculum may not always result in a transcript status change or progress percentage change for a curriculum. It depends on the setup and progress of the curriculum.

- Curricula that are in a status of ‘Completed Equivalent’ or ‘Exempt’ can not be reverted. If the session is part of 4 curricula, and 1 has a transcript status of ‘Completed Equivalent,’ and the other three have a status of ‘Completed,’ the Revert option on the Roster will not be available.
- Curricula with a transcript status of ‘Pending Completion Signature,’ ‘Pending Evaluation,’ ‘Pending Acknowledgement,’ or ‘Pending Completion Approval’ are considered valid statuses. If these curricula are reverted, they may have a change in transcript status. Any related emails or approval requests are updated based on the transcript status change.
- If a completed curriculum has associated points or badges, then a session revert inside the curriculum is not supported. However, if the curriculum is not completed and has associated points or badges, then a session revert inside the curriculum is supported.

Frequently Asked Questions (FAQs)

Why does the revert option not display even though the session is part of a curriculum?

Some scenarios do not allow a revert to occur. Some reasons for which the Revert option is not displayed for the session that is part of one or more curricula are:

- The Curriculum is also inside a certification.
- The Curriculum status is ‘Completed Equivalent’ or ‘Exempt’.
- The reverted session has a prerequisite, pre-work, or post-work association.
- The curriculum is completed and has points or badges associated with it.

Can I revert a session if the session is in multiple curricula?

Yes, as long as the curricula being reverted meet the scenarios supported, the session can be reverted, and the curricula impacted are processed.

What happens if my curriculum is completed and the session revert takes away any session completions for the curriculum?

The session revert causes the curriculum transcript status to change from completed to the appropriate transcript status (‘In Progress,’ for example). Also, the progress percentage and any applicable sections are recalculated. The transcript history for the curriculum shows an entry indicating the curriculum was reprocessed due to the session revert.

If I’m using the Audit PDF functionality, will the reverts be recorded in the Audit PDF?

Yes.

What happens if a session being reverted is part of a curriculum that is a prerequisite to another training? After the revert, Will the training return to a ‘Pending Prerequisite’ status?

No, if the session reverts, changes a curriculum transcript status from ‘Completed’ to ‘In Progress.’ If the curriculum was a prerequisite or pre-work to training, then that training status will not change when the transcript status changes.

Why I do not see the Revert option on the roster for my completed session if the curriculum meets the scenarios?

The revert option for sessions inside curricula requires that the feature is activated and that the user who is reverting has the security permission “Roster – Revert Sessions Inside Curricula.” A time frame for reverts can also be set in the ILT Preferences. By default, reverts are only allowed for up to 365 days. Still, it can be configured to be another time frame (maximum of 761 days) in the ILT preferences (top-level) using the preference “Specify the number of days to allow rosters for sessions to be reverted.”

Implementation

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

The availability of this functionality in Pilot and Production is controlled by a feature activation setting. To activate, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Allow Revert for Sessions which are part of Curricula** section, click **ACTIVATE**.

Permissions

The following new permission applies to this functionality:

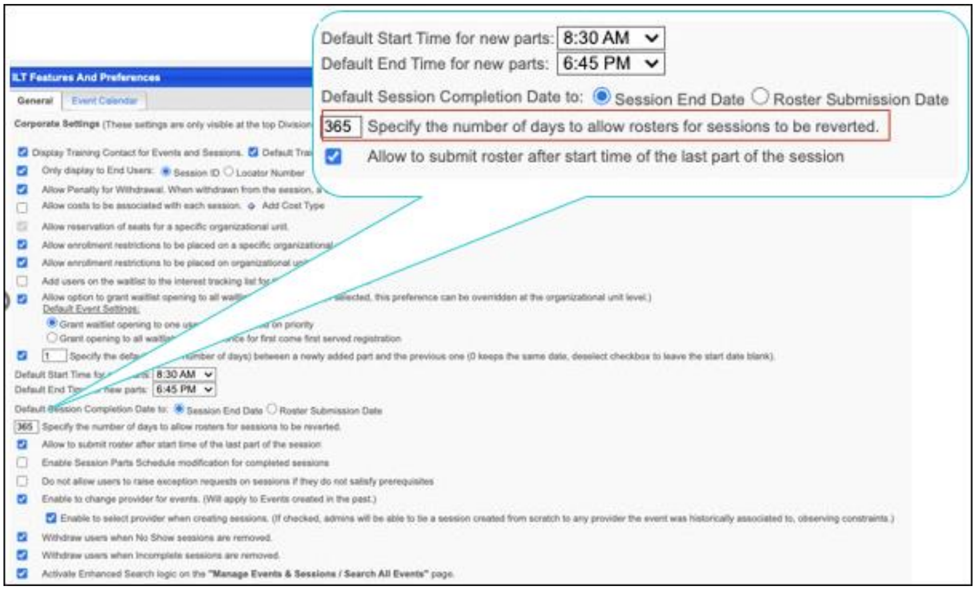
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Roster - Revert Sessions Inside Curricula	Grants the ability to revert instructor led training session rosters that are completed. This permission works in conjunction with Roster - Manage and Roster - View permissions and supports reverting sessions that are part of one or more curricula. This is an administrator permission.	Learning - Administration

Security Role

Upon release, the new Roster - Revert Sessions Inside Curricula permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

ILT Preference for Revert time frame

There is a new preference in the ILT Preferences page that enables the administrators to configure the time frame (in days) to allow session reverts.



This preference is only visible when the **Allow Revert for Sessions which are part of Curricula** is enabled.

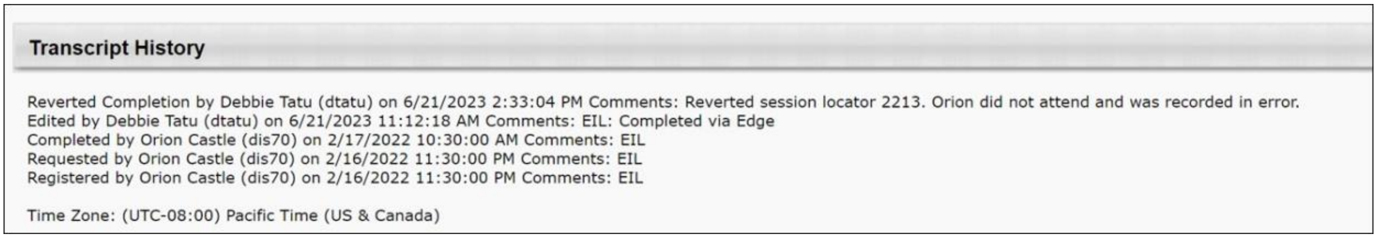
The minimum value is 1 day, which means the ‘Revert’ is allowed for only 1 day after the session is completed. The maximum value can be set to 731 days, and the default value will be set to 365 days.

This new preference applies to the revert timeframe for both standalone sessions and sessions within curricula.

Revert Impact on Curricula

A successful Session completion revert impacts the curriculum in the following ways:

- The Curriculum status is updated if applicable. For example, a Curriculum moving from ‘Completed’ to ‘In Progress’ upon a Session revert.
- The Curriculum progress percentage and the section progress are re-calculated.
- The Transcript History records and any comments captured during the session revert are reverted.


Transcript History

Reverted Completion by Debbie Tatu (dtatu) on 6/21/2023 2:33:04 PM Comments: Reverted session locator 2213. Orion did not attend and was recorded in error.
Edited by Debbie Tatu (dtatu) on 6/21/2023 11:12:18 AM Comments: EIL: Completed via Edge
Completed by Orion Castle (dis70) on 2/17/2022 10:30:00 AM Comments: EIL
Requested by Orion Castle (dis70) on 2/16/2022 11:30:00 PM Comments: EIL
Registered by Orion Castle (dis70) on 2/16/2022 11:30:00 PM Comments: EIL

Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Supported and Unsupported Revert Scenarios

The following representation shows different circumstances under which a revert is allowed and not allowed.

Supported Revert Scenarios

NUMBER	SCENARIO	EXPECTED RESULT
1	Session is part of one or more curricula	Revert is allowed.
2	Session is part of a removed curriculum	Revert is allowed.
3	Session is part of an inactive curriculum	Revert is allowed.
4	Session being reverted is part of a curriculum A and the curriculum is a prerequisite to another curriculum - Curriculum B	Revert is allowed. Curriculum A will be reprocessed but Curriculum B will not be updated.
5	Session being reverted is part of a curriculum V1 that is versioned to V2. User A has C1V1 and User B has C1V2	Revert is allowed and both curricula will be reprocessed.
6	Curriculum status is Completed, In Progress, Approved, Pending Approval, Pending Evaluation, Pending Acknowledgement, Pending Completion Approval, Pending Completion Signature	Revert is allowed and curriculum will recalculate progress and status.
7	Session being reverted is part of a curriculum that has sections	Revert is allowed. Note: LOs will not move back to Pending Prior Training status.
8	Session being reverted is part of a curriculum that has optional and required trainings	Revert is allowed. Note: LOs will not move back to Pending Prior Training status.
9	Session being reverted is part of Curriculum A which has bi-directional equivalency to Curriculum B and both curricula are NOT completed (none are completed equivalent)	Revert is allowed.
10	Session being reverted is part of a curriculum that has points or badges associated and Curriculum is NOT completed. (no points/badges were awarded)	Revert is allowed.
11	Session being reverted is part of a curriculum in Completed Equivalent or Exempt status	Revert is allowed.

Unsupported Revert Scenarios

NUMBER	SCENARIO	EXPECTED RESULT
1	Session being reverted is part of three curricula, one is Completed Equivalent, two are Completed	Revert is not allowed for all three curricula.
2	Session being reverted is part of a curriculum and the event is a prerequisite to another training	Revert is not allowed.
3	Session being reverted is part of a Curriculum A which is inside a Certification.	Revert is not allowed.
4	Session being reverted is part of a completed curriculum that has badges or points associated to it.	Revert is not allowed.

Auto-Completion of Videos Enhancements (Early Adopter)

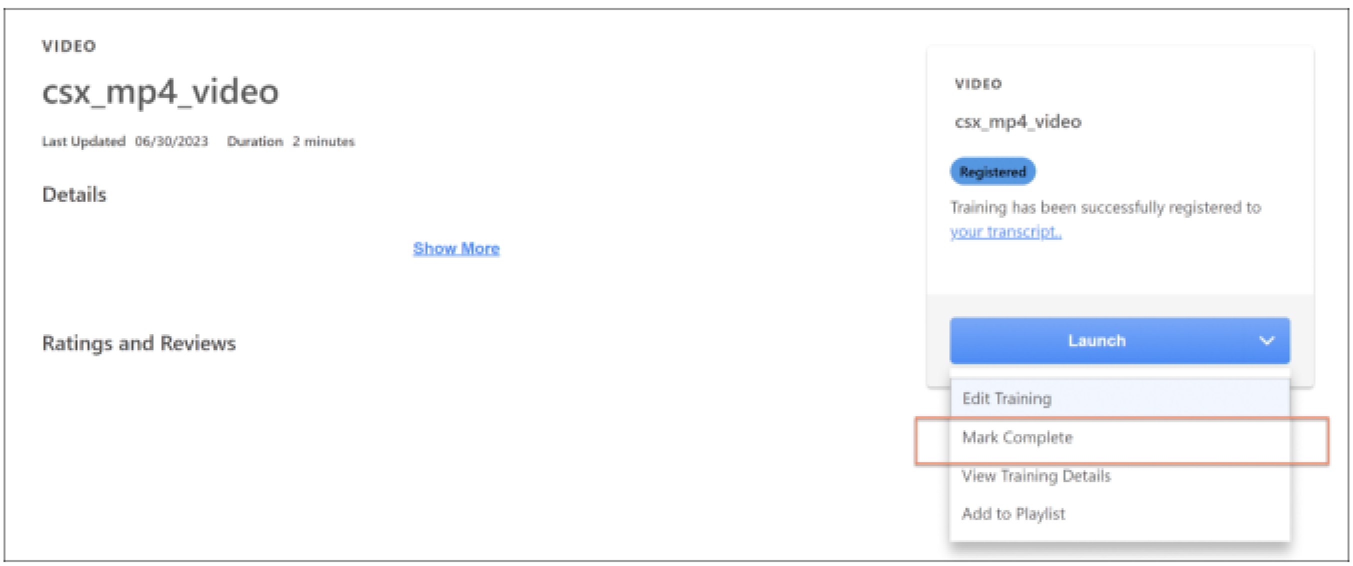
Prior to this enhancement, videos required the users to manually click ‘Mark Complete’ to complete training after watching a video.

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

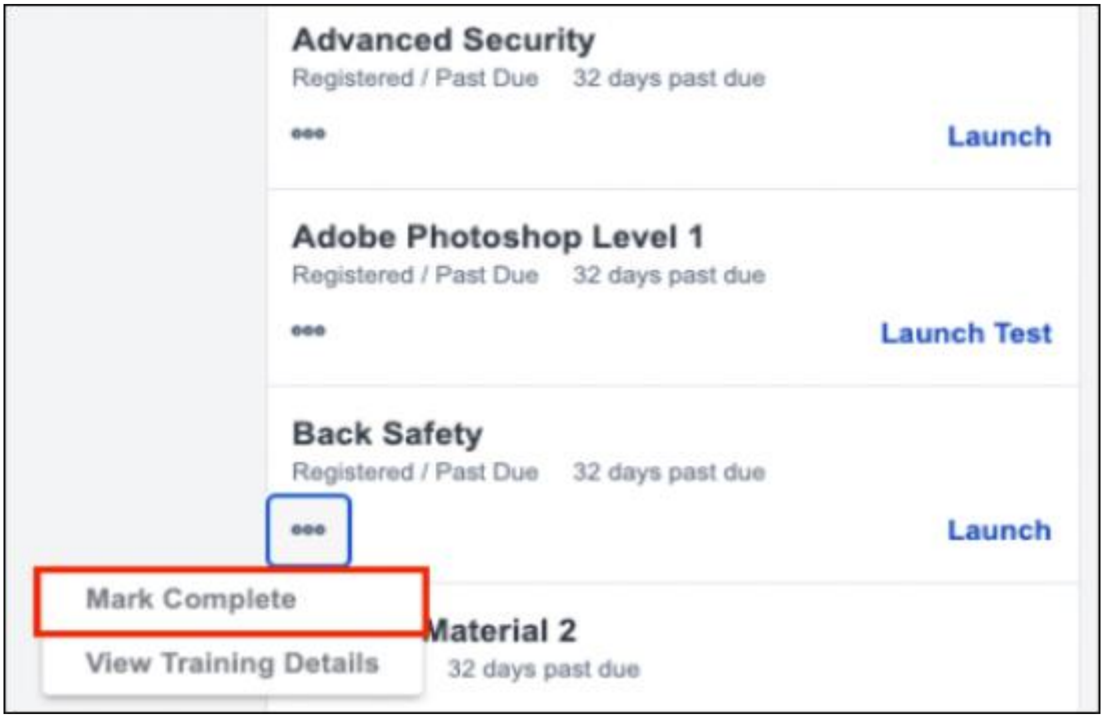
Enabling this functionality removes the ‘Mark Complete’ button from the following areas to maintain consistency:

- The ellipsis menu on the user transcript page.

- The Learning Details page when the video is already on the learner’s transcript.



- The “Continue Learning” carousel and training side panel in the Learner Home.



We have also added a supporting text under the video player to inform learners that the video automatically marks as complete once watched until the end. The text message displays standalone videos and is localized based on the learner's display language.

How Does this Enhancement Benefit My Organization?

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

Considerations

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

Implementation

This functionality is automatically enabled in Stage portals for all organizations using the Learning module and needs activation in Pilot and Production portals. To activate, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the Activate Video Auto-Completion section, click **ACTIVATE**. If the video auto-completion functionality is already enabled, no activation is required for these enhancements.

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

Admin Compliance Dashboard - Material and Online Course

Admin Compliance Dashboard - Material and Online Course

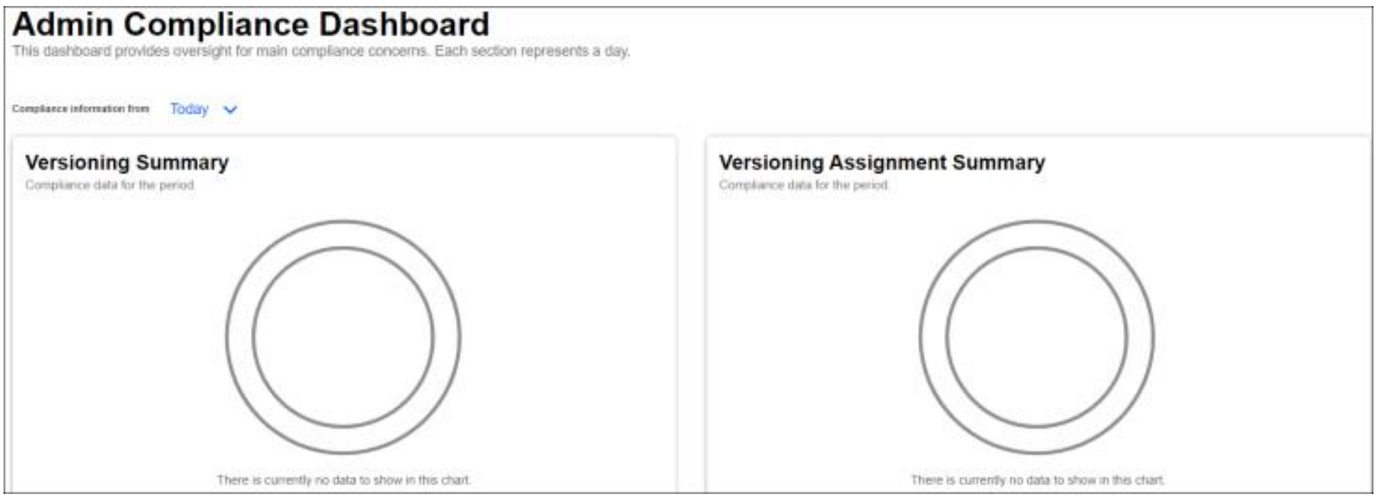
Customers need to check the effectiveness of training programs, versioning processes, and overall compliance to assign learners the correct training version at the right time.

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

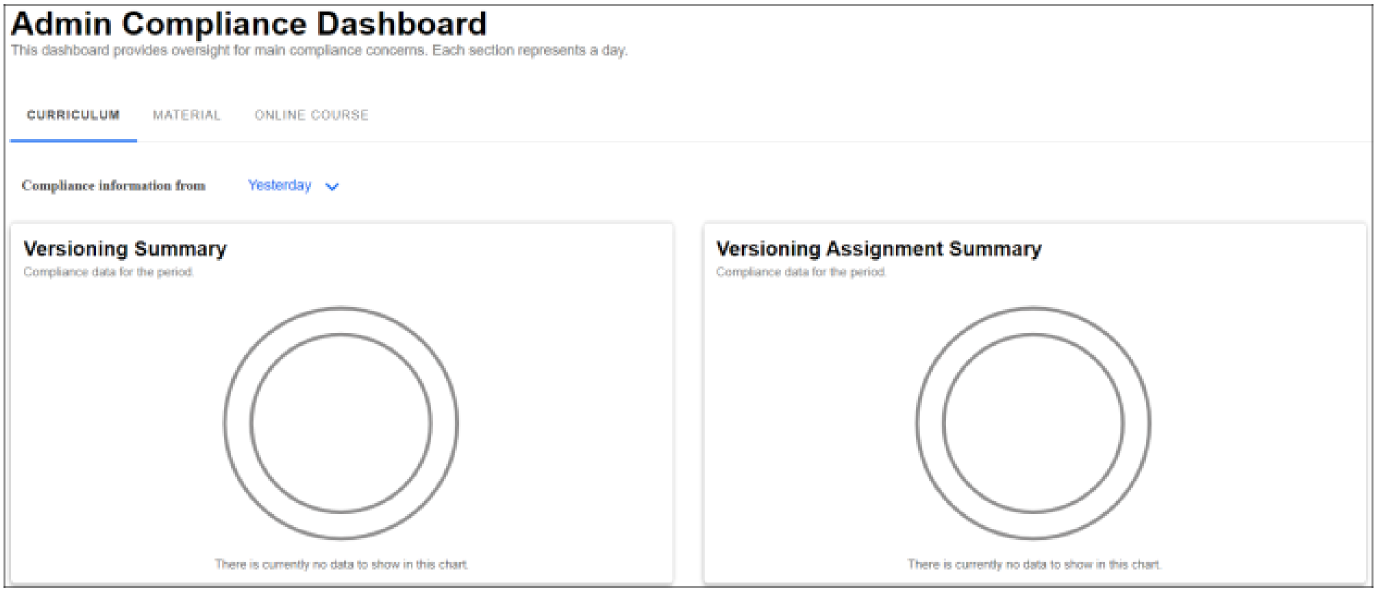
The Admin Compliance Dashboard has the following features:

- It displays the pass versus fail percentage for Material and Online Course versioning and assignment.
- It shows details about failed Material and Online Course for versioning and assignment on the flyouts.
- It contains a link to the Versioning Dashboard page to investigate failed assignment details.
- It includes breadcrumbs for ease of navigation.

Admin Compliance Dashboard - Before



Admin Compliance Dashboard - After



To access the Admin Compliance Dashboard, go to ADMIN > TOOLS > LEARNING > ADMIN COMPLIANCE DASHBOARD.

Considerations

- If no data is available for the day, the Dashboard displays an empty graph. It happens when no versioning has occurred in the system or when a very old date is selected.
- Unlike the Curriculum, the version number that failed for Material and Online Courses is shown in the Versioning Summary Widget.
- It is advisable to view the Admin Compliance Dashboard in the Desktop application.
- Suppose a Material or Online Course is not assigned to a single user. In that case, it is displayed as a failure in the Versioning Assignment Summary Widget, and the details are available on the Versioning Dashboard Page.
- Previously, saving a version without selecting Dynamic Assignment criteria during versioning was displayed as a failure in the Dashboard. Now, this scenario is not displayed as a failure if the versioning is successful.

Frequently Asked Questions (FAQs)

What are the possible reasons for Versioning failures?

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

What should I do if there are Versioning failures in the Dashboard?

In case of versioning failures, please raise a topic with Global Customer Support with the exact Material or Online Course Learning Object ID(s) and Title(s) listed in the Versioning Flyout Widget.

Implementation

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

Permissions

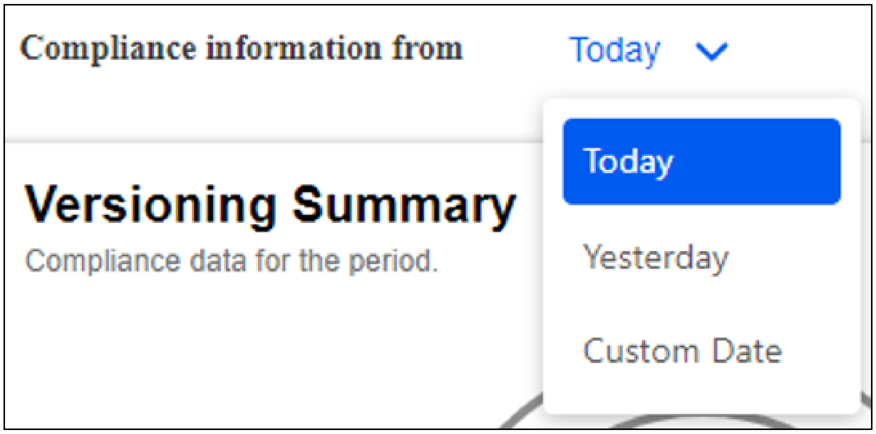
The following existing permissions apply to this functionality:

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

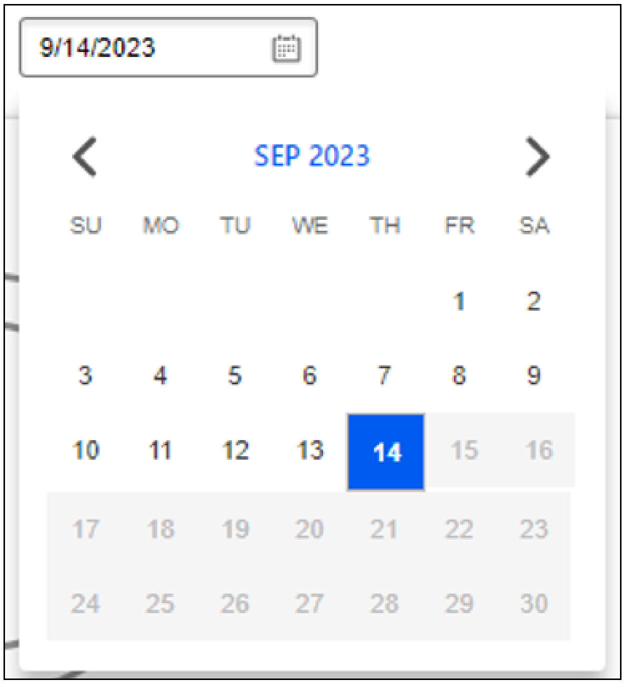
Date Picker

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

- Today
- Yesterday
- Custom Date



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



The Dashboard provides validation for the following:

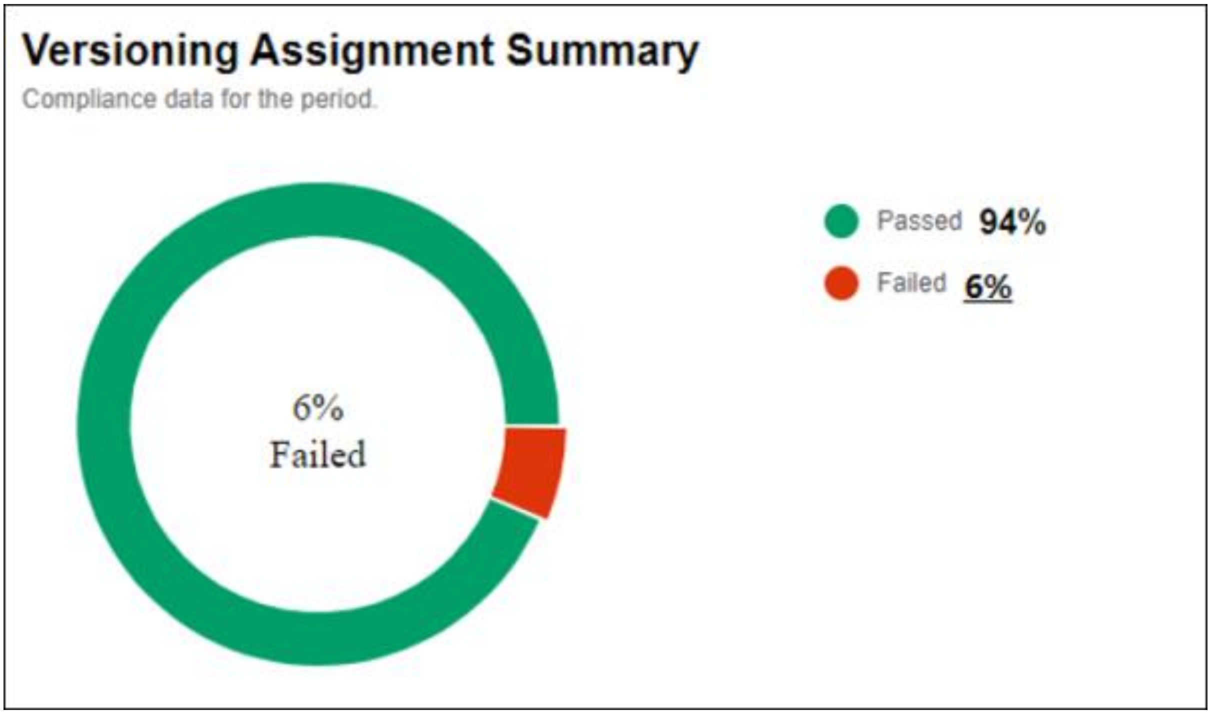
- Incorrect date format or empty date input
- Future date input


Compliance information from
Custom Date
21212
Please enter valid date.

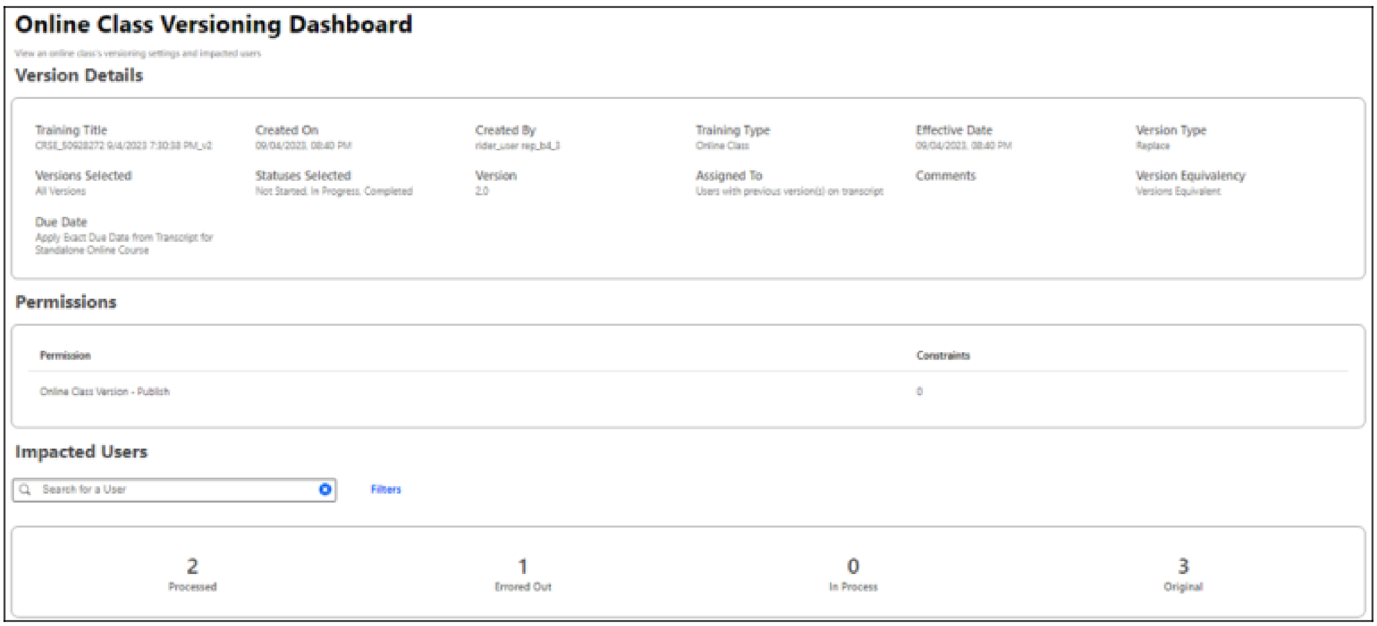

Compliance information from
Custom Date
8/8/2024
Date cannot be in the future.

Versioning Assignment Summary and Flyout

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



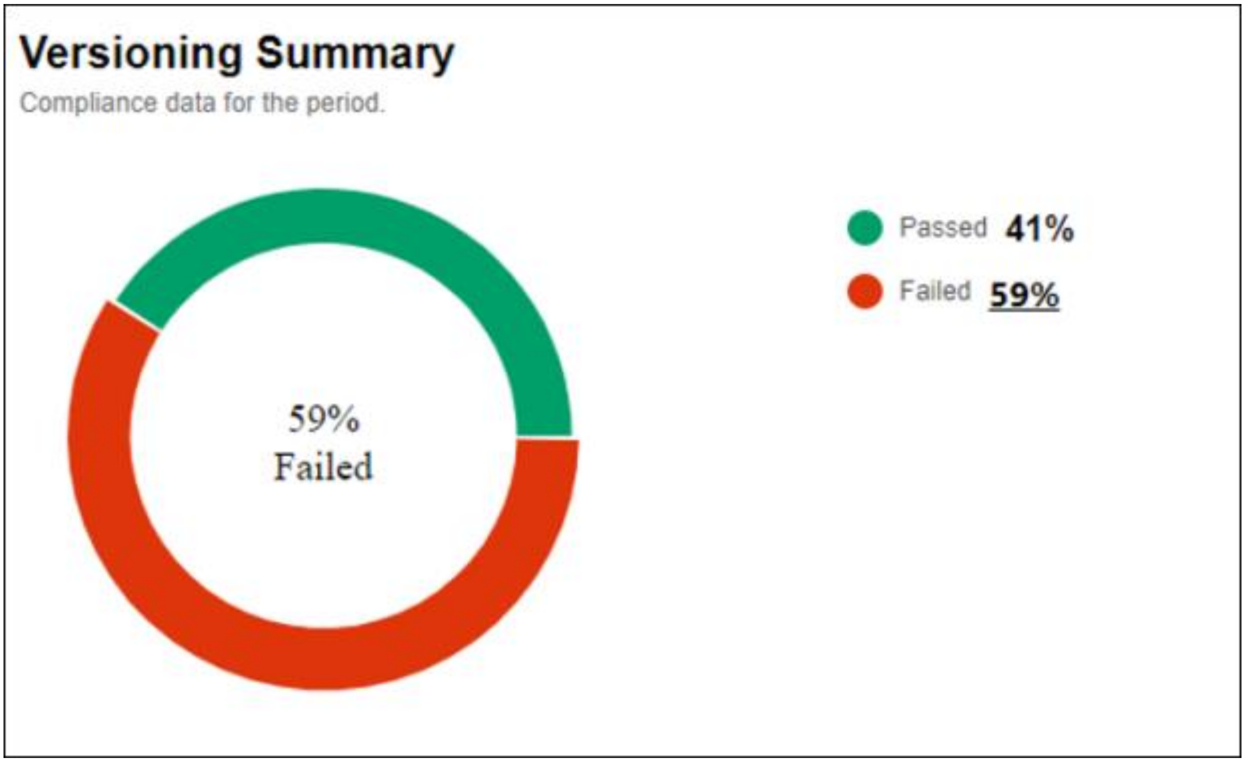
Versioning Assignment Details
Search For a Title
Search
Title
ID
CRSE_50928272 9/4/2023 7:30:38 PM_v2
b0ef2bb9-920f-44f6-b963-4028703367e1
View Details
(1 Results)
Cancel



Online Class Versioning Dashboard
View an online class's versioning settings and impacted users
Version Details
Training Title
CRSE_50928272 9/4/2023 7:30:38 PM_v2
Created On
09/04/2023, 08:40 PM
Created By
rider_user rep_b4_1
Training Type
Online Class
Effective Date
09/04/2023, 08:40 PM
Version Type
Replace
Versions Selected
All Versions
Statuses Selected
Not Started, In Progress, Completed
Version
2.0
Assigned To
Users with previous version(s) on transcript
Comments
Version Equivalency
Versions Equivalent
Due Date
Apply Exact Due Date from Transcript for Standalone Online Course
Permissions
Permission
Constraints
Online Class Version - Publish
0
Impacted Users
Search for a User
Filters
2
Processed
1
Errored Out
0
In Process
3
Original

Versioning Summary and Flyout

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



Versioning Details

Search For a Title

Search

Title	ID	Version
Material_Replace_20230911191115_27_V2	e27d8f01-1f09-47e0-bc04-28497b06c407	2
Material_Append_20230911191103_39_V2	65a2f6a0-1285-41ae-bc7f-cb57507a9a5f	2
Material_Replace_20230911191104_v2.0	07908020-ca8a-4529-a48e-5755aad8f2bc	2
Material_Append_20230911191058_20_V2	5b7fc8b6-5319-45d1-b236-4bfc5bedfcea	2
Material_Append_20230911191115_19_V2	bfb9fc67-1f92-44f7-bf6e-534d16b917dc	2
dmsMaterial2_LMS-93397_20230911191106_62_V2	7afea803-d1ea-4407-9252-f334975982b0	2

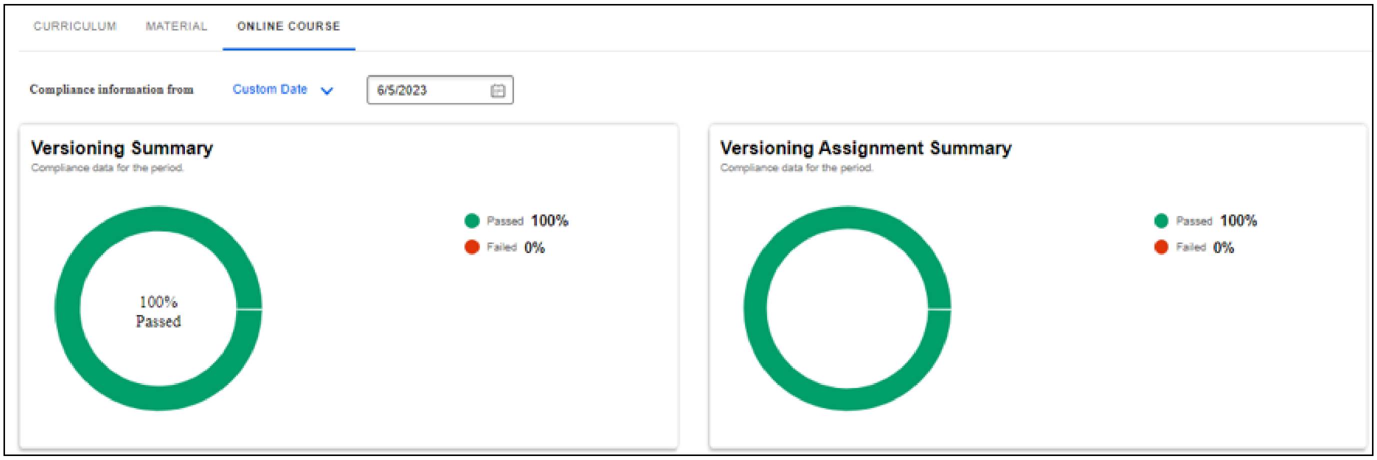
1 2 >

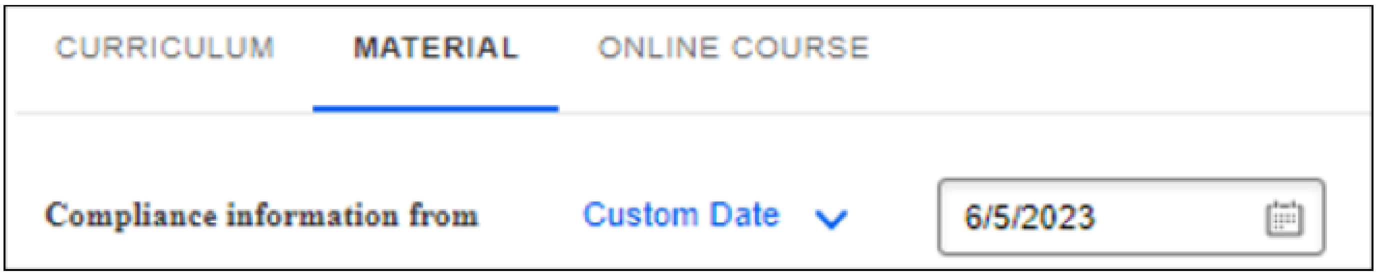
(32 Results)

Cancel

Tab Control

A new tab control functionality is available to view Curriculum or Material or Online Course details on the Dashboard. Selecting a specific Tab refreshes the data in both the Versioning Summary and Versioning Assignment Summary Widgets as per the date.





Certification Administration Enhancements

Certification Administration Enhancements

Prior to this enhancement, customers using many certification versions spent significant time inactivating one version at a time.

With this enhancement, the administrators can inactivate the top-level version and all lesser versions simultaneously instead of manually inactivating multiple versions of a certification one by one.

The enhancement comes with the following features:

- Ability to export pending and past requests to Excel.
- Ability to activate or inactivate certifications directly from the certification administration page.
- Prompt generation while deactivating or activating certifications.
- Indicator for inactive certifications on certification proxy enrollments.

How Does this Enhancement Benefit My Organization?

It reduces the number of clicks needed for deactivating versions and reviewing approval requests.

Considerations

If you do not wish to have the indicator displaying inactive certifications on the proxy enrollment list page, it can be turned off by opening a case with Global Customer Support.

Frequently Asked Questions (FAQs)

If I am inactivating a certification, will it always inactivate all versions?

No, when you inactivate a certification, you will be prompted to choose whether you want to inactivate just the current version or the current version and all lesser versions. For example, if you are inactivating version 6, you will be prompted as to whether you want to inactivate versions 6, 5, 4,3,2, and 1, or just version 6. If you had inactivated a certification with 7 versions and inactivated version 5 and selected all versions, this would inactivate versions 5,4,3,2, and 1. Versions 6 and 7 would remain active.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

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

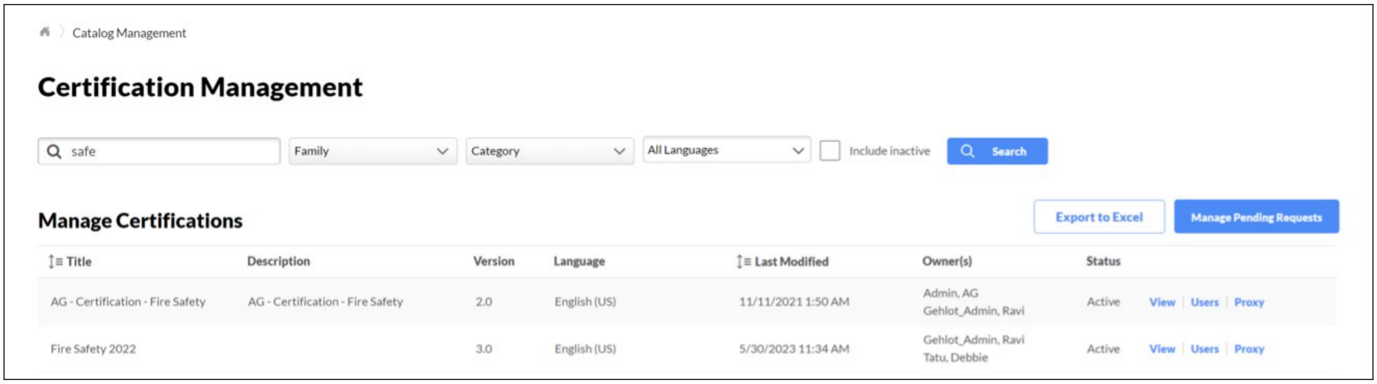
Certification - Categories Admin	Grants administrators ability to manage certification categories. This is an administrator permission.	Learning - Administration
Certification - Family Admin	Grants administrators ability to manage certification families. This is an administrator permission.	Learning - Administration

Export to Excel

The administrators can now export pending and past requests to Excel by clicking **EXPORT TO EXCEL**.

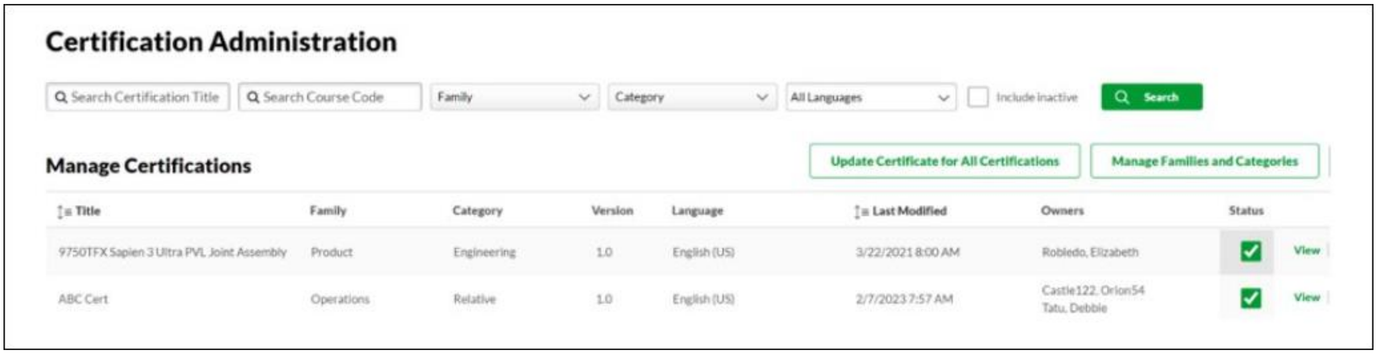
Considerations

- You can export up to 5000 records into Excel.
- The most recent 5000 records will be exported to Excel.
- If there are no records to export, the **EXPORT TO EXCEL** will not be clickable.

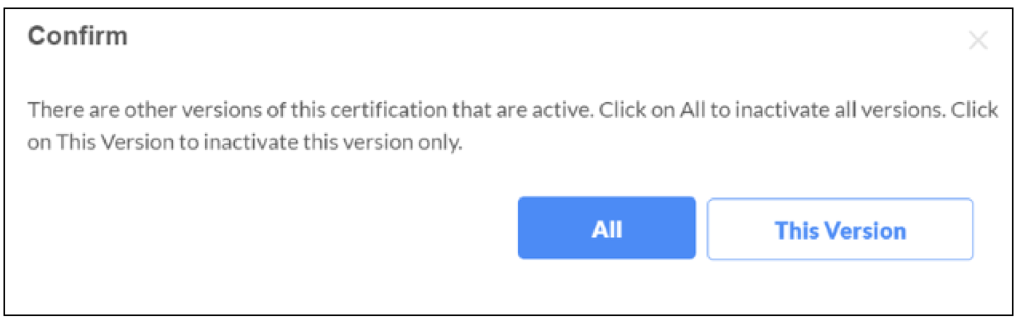


Inactivating Certifications

The administrators and certification owners can now inactivate multiple versions of a certification simultaneously. The certifications can be inactivated by navigating to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CERTIFICATIONS and unchecking the option under the Status column directly on the main certification administration list page.



When inactivating the certifications and their lesser versions, the user is prompted with a message - "There are other versions of this certification that are active. Click on All to inactivate all versions. Click on This Version to inactivate this version only." Clicking **ALL** inactivates the current version and all lesser versions. Clicking **THIS VERSION** inactivates only the current version.



For example, if there are 10 versions of a certification and version 10 is selected for inactivation, clicking **ALL** will inactivate Version 10, 9, 8, 7,6,5,4,3,2,1. However, clicking **THIS VERSION** will inactivate only Version 10. Again, if there are 10 versions of certification and if version 5 is selected for inactivation, then clicking **ALL** will inactivate Version 5,4,3,2,1 while clicking **THIS VERSION** will inactivate only Version 5.

This functionality also applies to activating an inactive certification. The user is prompted with the message - "There are other versions of this certifications that are inactive. Click on All to activate all versions. Click on This Version to activate this version only." Clicking **ALL** activates the current version and all lesser versions. Clicking **THIS VERSION** activates only the current version.

Note: *This prompt message appears only when there are lesser versions. In case of single versions, no prompt message appears.*

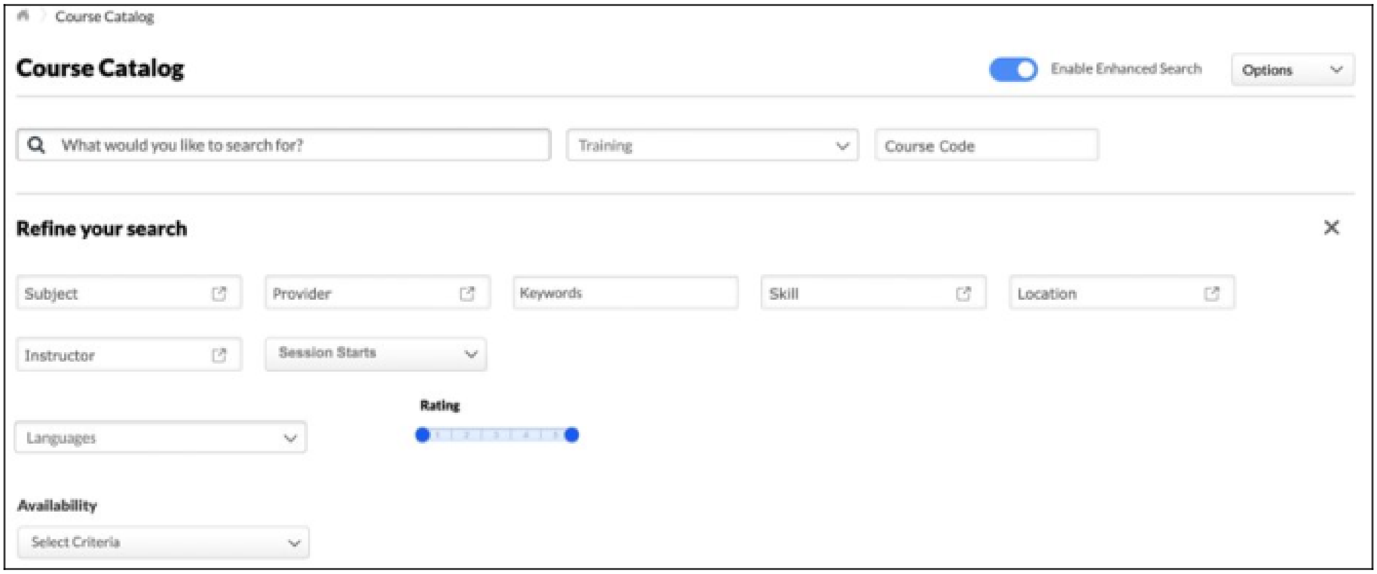
The certification proxy enrollment page contains an indicator that displays the inactive certifications being used by the proxies. If customers do not wish to have this indicator displayed on the proxy enrollment page, they can open a case with Global Customer Support to have it disabled.

Proxy ID	Training	Create Date	Created By	Type	Status	Dynamic Re-Enroll	Dyn
1472	!!FirstVersion_V2	7/20/2023 1:39 PM	Tatu, Debbie	Certified	Queued		

Course Catalog Search - Keyword Filter with Enhanced Search

Allowing administrators to filter based on keywords allows greater precision and accuracy when locating content within the course catalog.

With this enhancement, it is now possible to filter by keyword when Enhanced Search is enabled on the course catalog search page. The Keyword filter uses “partial match” and “starts with” when returning search results. The filter can be enabled and disabled in the Search Preferences.



To enable, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > SEARCH > MANAGE SEARCH PREFERENCES > TRAINING. In the **Training** section, scroll to **Filters** and select **Keywords** under the Admin Pages column to activate this filter.

Note: *This enhancement currently does not support the Keyword filter in Global Search.*

How Does this Enhancement Benefit My Organization?

A search filter based on Keywords provides greater flexibility and precision when searching for accurate results.

Frequently Asked Questions (FAQs)

My search results are different when Enhanced Search is enabled or disabled. Is that expected?

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

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

Admin Search Preferences - Manage	Grants ability to configure preferences for Global Search and Course Catalog within Search Preferences. The constraints of this permission are inherited from the Global Search Preferences - Manage permission. This is an administrator permission.	Learning - Administration
Global Search Preferences - Manage	Grants ability to configure Global Search Preferences. This is an administrator permission. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU and User's OU. By default, this permission is constrained to the organization.	Core Administration

Curriculum Versioning Enhancement

Prior to this enhancement, the administrators could not know if a curriculum version had been assigned to any user. Also, editing the Structure section of an unassigned Curriculum and saving the edits created a new curriculum version.

With this enhancement, the Structure section displays a message to notify the administrators when no assignment has happened to the curriculum version. When no user has been assigned to the curriculum version, making changes in the Structure section and clicking save does not create a new curriculum version. A new refresh icon is available to check for the Curriculum assignment status. When the Curriculum is assigned to a user, the message and the refresh icon disappear, and the administrators can create new Curriculum version.

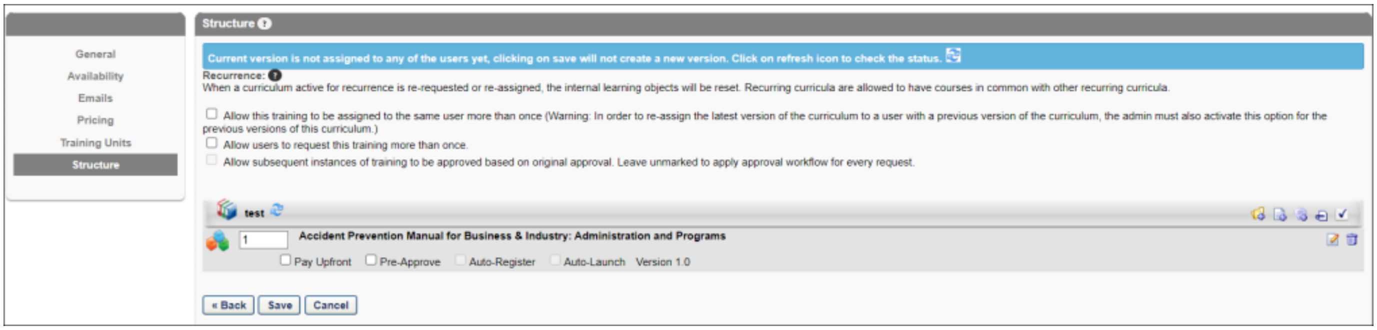
Note: *The "Refresh" icon does not trigger system assignment processing. It just checks whether any assignment has happened for the Curriculum version.*

Note: *Generally, the assignments process quickly. This is for scenarios where assignments might take time due to delays.*

To know more about structure changes that can cause a new version, *See Curriculum - Edit.*

Curriculum Versioning Enhancement - How does it work?

- When a Curriculum version is not assigned to a user, the **Structure** section displays the following message to the administrators, **Current version is not assigned to any of the users yet, clicking on save will not create a new version. Click on refresh icon to check the status.**
- Click the refresh icon to check the assignment status of the Curriculum. The message appears as long as the Curriculum remains unassigned. Also, in case of no assignment, saving the structural edits does not create a new curriculum version, and the Curriculum continues to display the existing version number after saving.
- Once the Curriculum is assigned to a user, the message and the refresh icon disappear, and the administrators can create a new version of the Curriculum after saving the edits made in the **Structure** section.



Use Case

An administrator created a Curriculum with version 1 (C1V1) and saved the structure. C1V1 has not been assigned to any user. As long as C1V1 remains unassigned, the Structure section of C1V1 displays the message, **Current version is not assigned to any of the users yet, clicking on save will not create a new version. Click on refresh icon to check the status.** Therefore, editing and saving Structure does not create a new version of C1V2. The administrator clicks on the refresh icon to periodically check for the C1V1 assignment status. Once C1V1 is assigned to a user, the message and the refresh icon disappear, and the administrator can create a new version of C1V2 after editing and saving the Structure of C1V1.

How Does this Enhancement Benefit My Organization?

The enhancement ensures that the administrators make the right choice during the versioning process.

Considerations

- This functionality is more relevant in scenarios where the administrators create back-to-back versions of a Curriculum within a short span.
- Customers may also experience improved email performance during versioning as some optimizations have also been included with the release.

Frequently Asked Questions (FAQs)

Will this change impact any of the existing functionality?

No, it does not impact any existing functionality.

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
Curricula Admin - Manage	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. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement. ***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.*	Learning - Administration
Curriculum Owner	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.	Learning - Administration
Curriculum Player Options	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.	Learning - Administration

Enable Curricula Auto-Launch Option	Grants ability to enable the curricula auto-launch feature via the Structure step when creating or editing a curriculum. This is an administrator permission.	Learning - Administration

Deep Link Enhancements

Deep Link Enhancements

Prior to this enhancement, there was a possibility of Base URLs and Page URLs in the Deep Link page getting accidentally deleted without any warning.

With this enhancement, the administrator is prompted with a confirmation message before deleting Base URLs to prevent accidental deletion. The enhancement also enables the activation or deactivation of system or user-defined Page URLs instead of deleting them. A new filter has been added to include all inactive Page URLs. This is accompanied by a new audit history functionality that captures all the activation and deactivation of Page URLs and tracks new Page URLs or edits made on Page URLs.

Besides tackling accidental deletion, the enhancement has replaced the custom reports links and deep link generation so that customers can generate a deep link to the Reporting 2.0 main page instead.

How Does this Enhancement Benefit My Organization?

It helps prevent accidental deletion of Base URLs and Page URLs by adding guardrails and reducing work orders.

Considerations

- The Base URL deletions are not tracked in the Modifications History table.
- The activation, deactivation, or addition of a new Page URL or edits to an existing Page URL is tracked in the modification history table accessible from the Deep Links Page URL page.
- The modification history only tracks the change in the Page URL, but does not track the old Page URL and the new Page URL value.

Implementation

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

Permissions

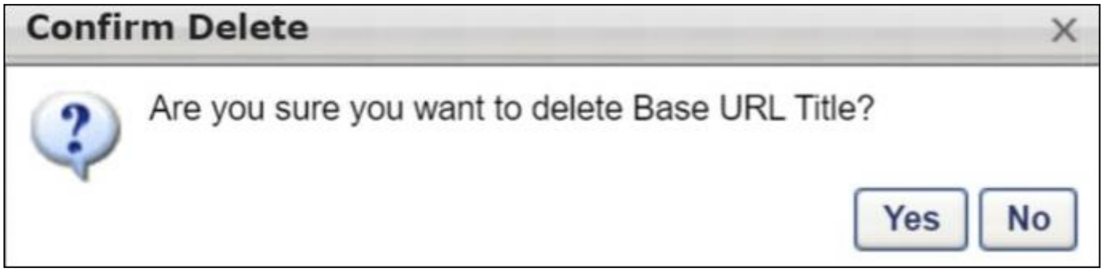
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Deep Link: Manage	Allows administrator to define the Base URL for all SSO module links. This permission cannot be constrained. This is an administrator permission.	Core Administration
Deep Link: View Modules	Allows administrator to view the deep links URLs. This is an administrator permission.	Core Administration

Deep Links Base - URL delete confirmation

When an administrator chooses to delete a Base URL, a confirmation message is prompted to prevent the accidental deletion of Base URLs. To delete a Base URL, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > DEEP LINKS > BASE URL.

Delete Base URL confirmation message in old UI



Delete Base URL confirmation message in new UI

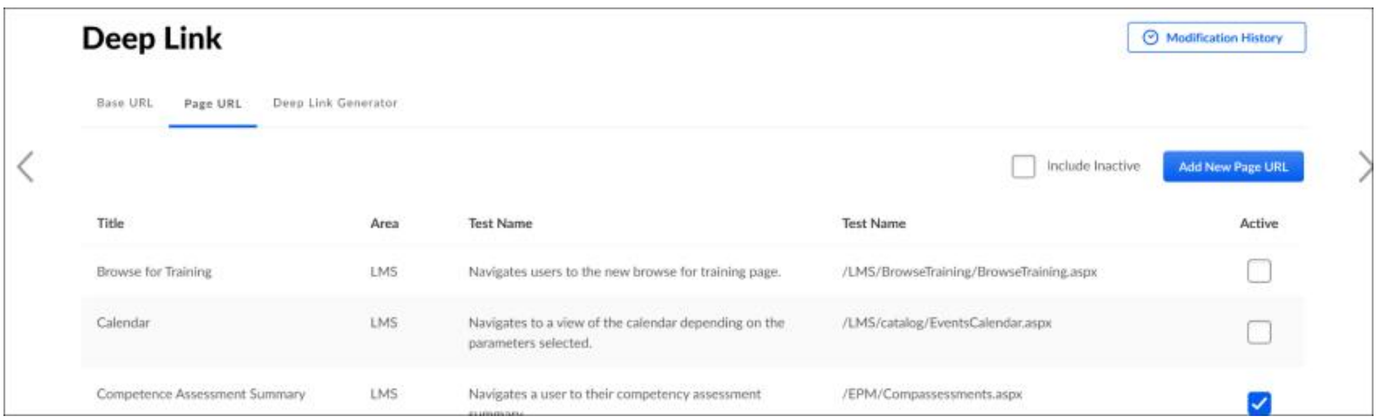
Deep Links Page URL changes

The administrators can now deactivate Page URLs instead of deleting them, as the delete functionality has been replaced with the ability to activate or deactivate Page URLs. It also enables the administrators to reactivate a Page URL that was deactivated previously.

The administrator must uncheck a selected checkbox under the Active column to deactivate a Page URL.

Activate or deactivate Page URL in old UI

Activate or deactivate Page URL in new UI



Deep Links Page URL Modification History

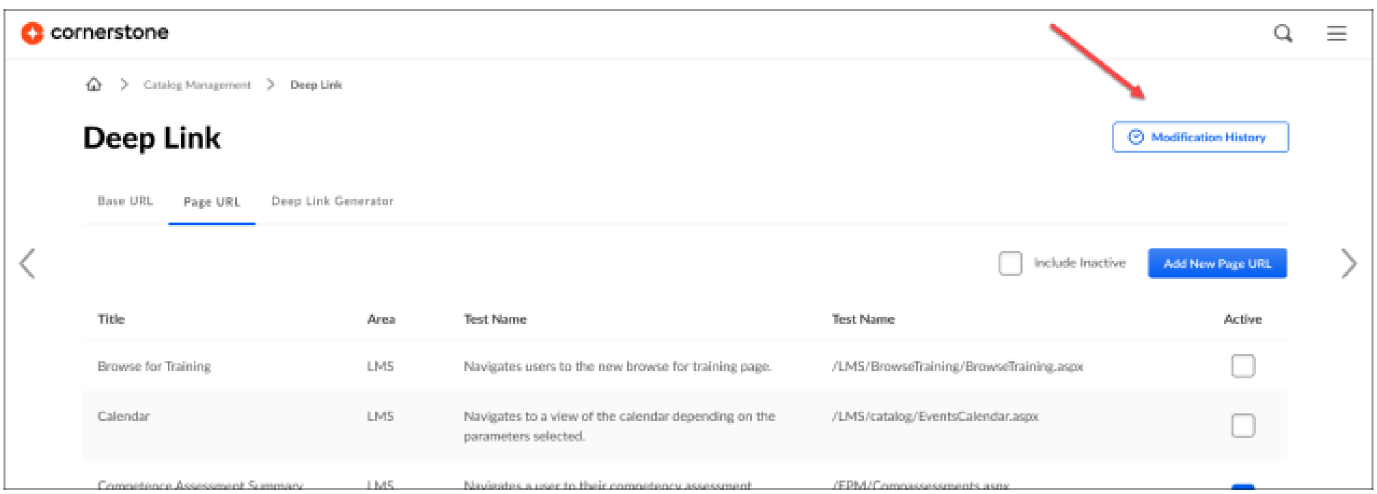
When the administrator deactivates or activates a Page URL, an audit history table tracks the following:

- Activation or Inactivation of a Page URL, creation of a new Page URL, and edits made on a Page URL.
- Full name and user ID of the user who performed either of the actions mentioned above.
- The date of action.

The audit history table is accessible by clicking on **MODIFICATION HISTORY**.

Modification History in Old UI

Modification History in New UI



The audit history table displays 10 rows on each page.

Old UI

History

(15 Results) 1 2 3 4 5

Effective Date	Change Type	Page URL	Area	Description	User
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu
06/20/2023 7:52:01 PM	Status Updated	Browse for training	LMS	Status to **Inactive**	Tran hieu

New UI

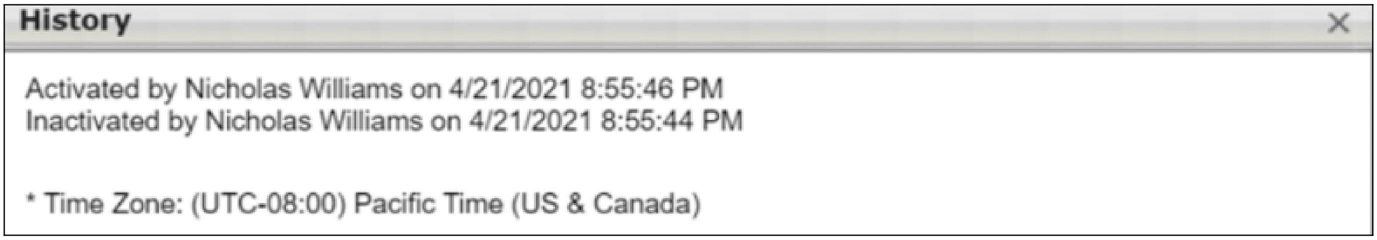
Modification History

Effective Date	Page URL	Area	Description	User
06/20/2023 7:52:01 PM	Browse for training	LMS	Status to **Inactive**	Tran Hieu (User ID)
06/20/2023 7:51:01 PM	Custom Reports	LMS	Status to **Inactive**	Tran Hieu (User ID)
06/20/2023 7:32:22 PM	Calendar	LMS	Status to **Inactive**	Tran Hieu (User ID)
06/18/2023 7:52:12 PM	Custom Reports	LMS	Page URL **created**	Tran Hieu (User ID)
06/10/2023 1:52:23 PM	Browse for training	LMS	Status to **Inactive**	Tran Hieu (User ID)
06/07/2023 7:52:00 PM	Browse for training	LMS	Status to **Active**	Tran Hieu (User ID)
06/06/2023 7:52:00 PM	Browse for training	LMS	Status to **Inactive**	Tran Hieu (User ID)
06/05/2023 7:52:00 PM	Custom Reports	LMS	Status to **Active**	Tran Hieu (User ID)
06/04/2023 7:52:00 PM	Custom Reports	LMS	Status to **Inactive**	Tran Hieu (User ID)
06/03/2023 7:52:00 PM	Custom Reports	LMS	Status to **Active**	Tran Hieu (User ID)

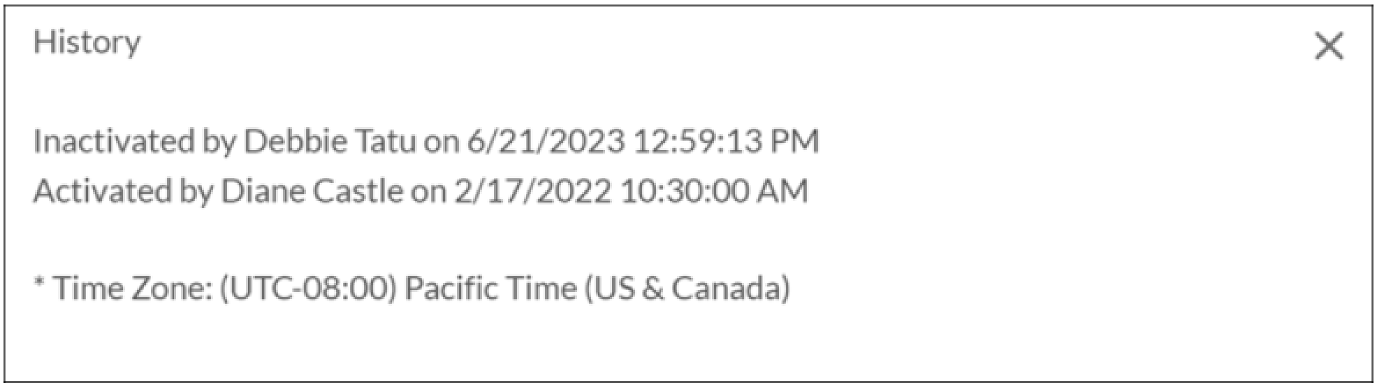
Showing 1-10 of 67 1 2 3 4 5

You can check the details of each Page URL in the audit history.

Old UI


History
Activated by Nicholas Williams on 4/21/2021 8:55:46 PM
Inactivated by Nicholas Williams on 4/21/2021 8:55:44 PM
* Time Zone: (UTC-08:00) Pacific Time (US & Canada)

New UI

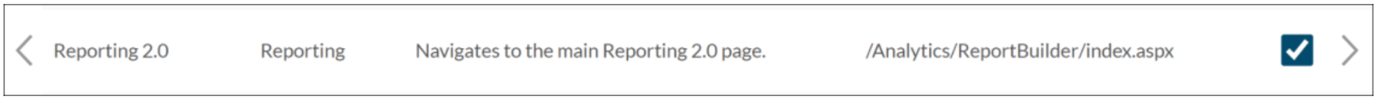

History
Inactivated by Debbie Tatu on 6/21/2023 12:59:13 PM
Activated by Diane Castle on 2/17/2022 10:30:00 AM
* Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Reporting 2.0 replaces Custom Reports in Page URL

We have replaced the Custom Reports links and deep link generation so that customers can generate a deep link to the Reporting 2.0 main page instead.

Old Page URL with Custom Reports

New Page URL with Reporting 2.0



General Due Date Enhancements

General Due Date Enhancements

Prior to this enhancement, when learners missed their due dates for the assigned training, it resulted in past due instances causing compliance gaps and inconsistencies.

This enhancement provides consistent due date calculations across different use cases so that the learners do not miss the due date for the training and remain compliant.

How Does this Enhancement Benefit My Organization?

- The administrators can maintain overall compliance by ensuring that the learners do not become past due for training.
- The managers can track and report on the due date of the Training efficiently, ensuring compliance for their subordinates.
- The learners do not become past due by missing the due date to complete the assigned training.

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

	only assign to and view assignments created by users within the constraints. This is an administrator permission.	
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	Learning - Administration
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration
Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission.	Learning - Administration

General Due Date Enhancements Use Cases

Use Case 1: Consider Override Due Date Maintain Progress is On

Curriculum A has a child learning object (LO) called Material M1. Material M1 due date is set to 21 days from the most recent assignment. Curriculum A is now assigned through Dynamic Learning Assignment to Learner 1 and Learner 2. Material M1 is now removed from the structure of Curriculum A causing the Curriculum to version to Curriculum A version 2. Material M1 is now removed from the Learner transcript by an administrator. Now a new Curriculum B is created which includes Material 1 in its structure and Material 1 due date is set 30 days from the most recent assignment. Now Curriculum B is assigned through a new Dynamic Learning Assignment to Learner with Assign New Occurrence ON, Maintain Progress ON, and Override Prior Due Date ON.

Before the enhancement: Learner was retaining the previous due date for Material 1.

After the enhancement: Learner gets the new due date as per Curriculum B assignment for Material 1.

Use Case 2: Reset Due Date when re-assigning Removed Child LO

Curriculum A V1 has a Material 1 V1 and a note. The due date for Material 1 V1 is set to 21 days from the initial assignment date in the Curriculum A V1 structure. Curriculum A V1 is now assigned through a Learning Assignment to a Learner. The Child LO Material 1 Version 1 is removed from the structure of the Curriculum A creating a new version of Curriculum A V2 and the Child LO is now standalone on Learner's transcript (Any configurations can be selected during versioning). The Standalone Child LO Material 1 V1 is manually removed from Learners' transcript either by transcript removal or using Training removal tool. Now a Curriculum B V1 is created having Material 1 V1 with due date set to 25 days from the initial assignment date in the structure. Now Curriculum B V1 is assigned through Learning Assignment to the Learner with Assign New Occurrence ON, Maintain Progress ON, and Override Prior Due Date OFF.

Before the enhancement: Learner was retaining the previous due date for Material 1 V1.

After the enhancement: Learner gets the new due date for Material V1 as per new due date criteria (25 days from initial assignment).

Conclusion: If a Learning Object (LO) with a due date is removed from a Learner transcript and then re-assigned, the learner receives a new due date regardless of override prior due date configuration.

Use Case 3: New Due Date email trigger after removed LO is restored

Learner is assigned a Material A through Dynamic Learning Assignment with a due date. Material A is now dynamically or manually removed from the Learner transcript. Material A is re-assigned through standard or dynamic learning assignment with a new due date with Assign New Occurrence ON, Maintain Progress ON, and Override Prior Due Date ON.

Before the enhancement: Learner was not receiving an email as per new due date.

After the enhancement: Learner receives an email as per the new due date.

Use Case 4: Due date not updated with Dynamic Assignment Re-versioning

When "Apply Previous Version Due Date Criteria" is selected, 'No Due Date' is assigned if the associated previous version was assigned via a Learning Assignment that had no due date set. The due date is only recalculated if that Learning Assignment had a due date criteria set as 'Relative to Assigned Date'. For other criteria such as 'Relative to Hire Date/Custom Field', the due date is copied from the previous version.

Append version with no due date LAT criteria:

- Create a Material 1 version 1 (M1V1).
- Assign M1V1 to Learner 1 via Learning Assignment Tool (LAT). Do not set the Due Date in LAT.
- Go to Learner 1 transcript and set the Due Date for M1V1.
- Version M1V1 in append mode. Select all versions, all statuses, and previous version Due Date Criteria.

Before the enhancement: Due Date from M1V1 is copied to M1V2.

After the enhancement: No Due Date for M1V2.

Append version with no LAT:

- Create a Material 1 version 1 (M1V1).
- Assign M1V1 directly to Learner 1.
- Go to Learner 1 transcript and set the Due Date for M1V1.
- Version M1V1 in append mode. Select all versions, all statuses, and Previous Version Due Date Criteria.

Before the enhancement: Due Date from M1V1 is copied to M1V2.

After the enhancement: No Due Date for M1V2.

Append version with Due date in Curriculum structure and Training Removal Tool:

- Create a Material 1 version 1 (M1V1).
- Create a Curriculum 1 version 1 (C1V1). Add M1V1 to C1V1. Add the due date for M1V1 inside the Curriculum.
- Assign C1V1 to Learner 1 via LAT.
- Use the Training Removal Tool (TRT) to remove C1V1 from Learner 1 Transcript. Clear the "Remove training within Curricula" option.
- Version M1V1 in append mode. Select all versions, all statuses, and Previous Version Due Date Criteria.

Before the enhancement: Due Date from M1V1 is copied to M1V2.

After the enhancement: No Due Date for M1V2.

Append version with Due date in Curriculum structure:

- Create a Material 1 version 1 (M1V1).
- Create a Curriculum 1 version 1 (C1V1).
- Add M1V1 to C1V1. Add the due date for M1V1 inside the Curriculum.
- Assign M1V1 via Dynamic LAT to Learner 1.
- Version M1V1 in append mode. Select all versions, all statuses, and Previous Version Due Date Criteria.
- Assign C1V1 to Learner 1 via Standard LAT or Direct Assignment.
- Version M1V2 in append mode. Expire M1V1 in the popup.

- Select all versions, all statuses, Users Assigned by Dynamic LAT, and Previous Version Due Date Criteria.

Before the enhancement: Due Date from M1V2 is copied to M1V3.

After the enhancement: No Due Date for M1V3.

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

Cornerstone has introduced a modernized look and feel for the most used learning administration pages. These user interface page changes are currently available for customers to review in Pilot and Stage and can be self-activated in Production. At the start of User Acceptance testing (October 18) and in preparation for the November '23 Release, the new user interface updates for learning administration pages are automatically enabled in all customer stage portals. We want to provide customers with time to test, update documentation, and prepare for the adoption of user interface changes.

With the November release, we have completed our planned user interface work for the most frequently used learning administrator pages. We will be continuing to focus on other projects such as administrator usability which will focus on both user interface and user experience enhancements.

What do I need to know about deprecation of pages?

The new user interface (UI) for learning administration pages will be automatically enabled in Production portals with the Q1 2024 Release and customers will have the option to disable the new UI modifications. With the Q3 2024 Release, the new UI for learning administration pages will be automatically enabled in Production portals and the legacy UI pages will be permanently disabled.

Deprecation Milestones

- October 18, 2023: All Stage portals have new UI enabled
- November 17, 2023: Needs self-activation in Production portals
- March 22, 2024 (Q1 2024): All Production portals will automatically enable the new UI pages. Customers will still have the option to disable it. We will drop a reminder about the deprecation of legacy UI page's timeline
- Q3 2024 Release: The new UI of learning administration pages will be automatically enabled in all Production portals, and the legacy UI pages will no longer be available. Customers will be unable to revert to legacy UI

How can I prepare?

Create a test plan and review the following pages:

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

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

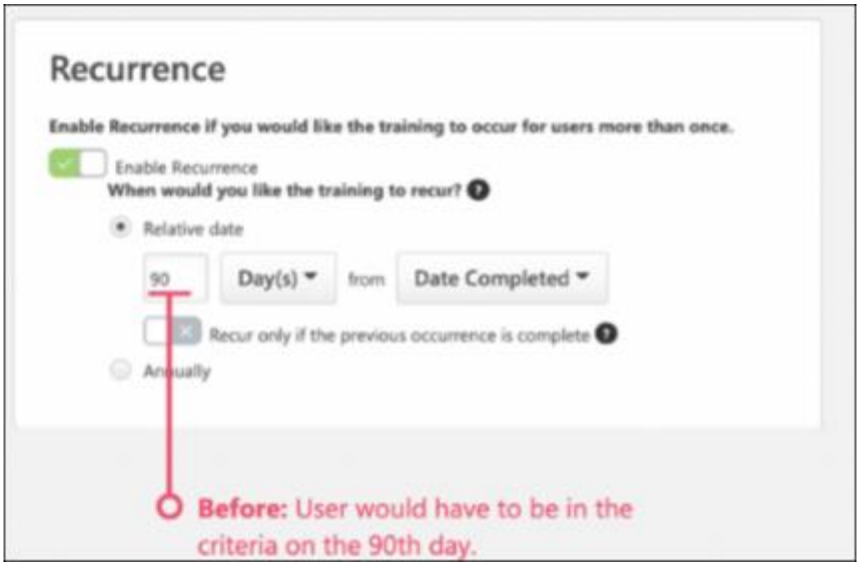
We want to hear from you. Your input and feedback will help us continue to deliver what you need for your teams and organizations. Please go to Customer Success Center and search for "Feedback Requested – UI Modifications and Enhancements" to share your feedback.

Learning Assignment Tool - Relative Recurrence Enhancement (General Availability)

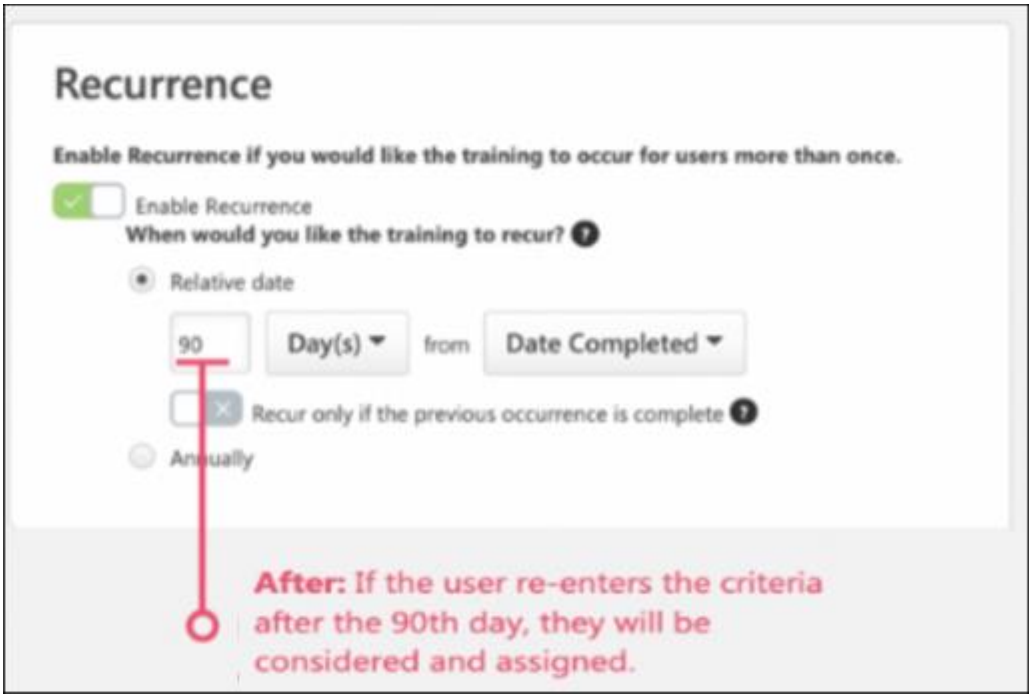
Prior to this enhancement, when the users did not meet the recurrence date criteria for dynamically recurring Learning Assignments, the training assignments were not assigned to the users even if they met the assignment criteria later, affecting overall compliance.

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

Before



After



How Does this Enhancement Benefit My Organization?

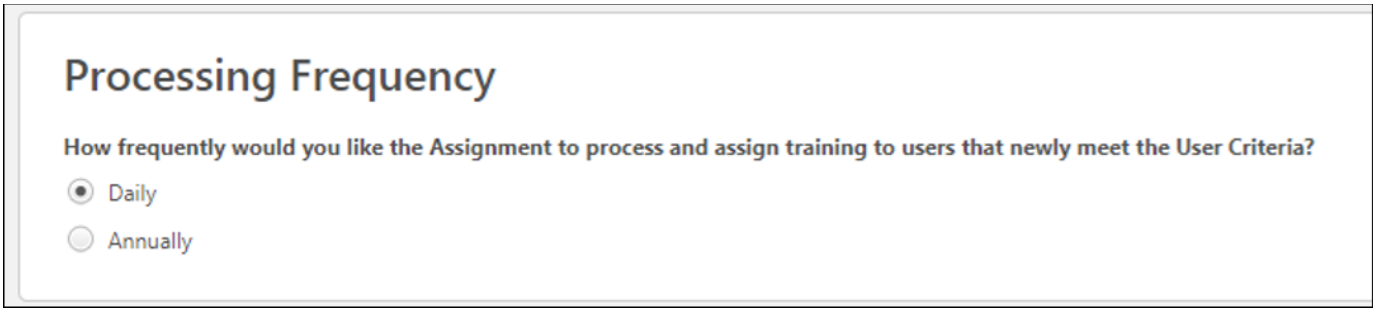
- Administrators can ensure that the users comply with the dynamically recurring Learning Assignments, thus reducing additional overhead to create another training assignment if a recurrence is missed.
- The users are later assigned the trainings even if they miss the training assignments because of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

Use Cases

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

Considerations

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



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

Frequently Asked Questions (FAQs)

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

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

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

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

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

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

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

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

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

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

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

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

Implementation

This functionality is automatically enabled for all organizations in Stage portals on October 18 and Production portals on November 17.

Permissions

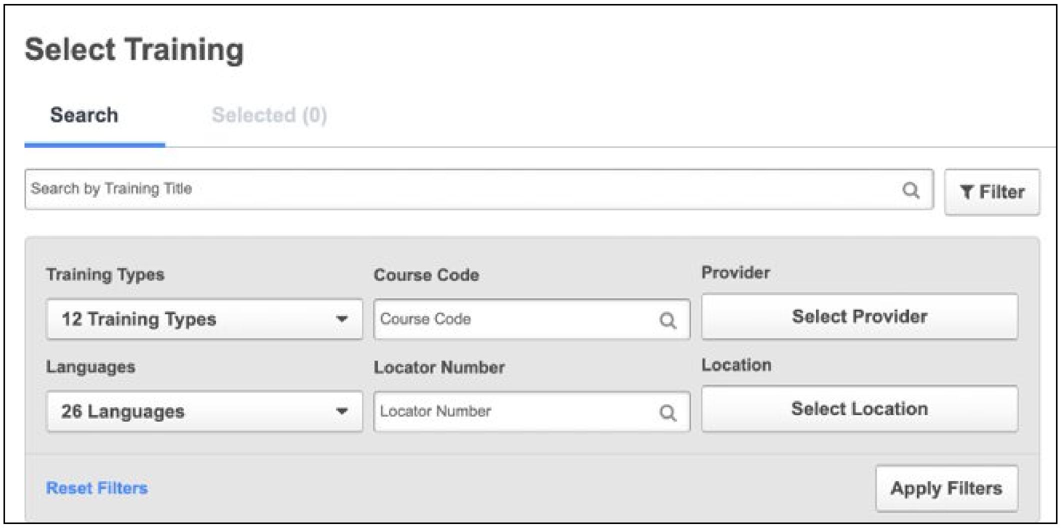
The following existing permissions apply to this functionality:

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

Learning Assignment Tool - Search Training Modal - Enhanced Search

Prior to this enhancement, the Search Training Modal within the Create Assignment Workflow used the Traditional Search which uses SQL to return results. SQL has a longer processing time for large data sets and is not as scalable as data grows over time.

With this enhancement, the Search Training Modal within the Create Assignment Workflow allows administrators to use the Enhanced Search as a default setting. The Enhanced Search supports all the filters in the Search Training Modal except for the Description filter.



To access Search Training Modal, go to ADMIN > TOOLS > LEARNING > LEARNING ASSIGNMENT TOOL and click **CREATE ASSIGNMENT**. In the **Setup** section, click **SELECT TRAINING** under **Training Selection** field. It opens the Select Training flyout that includes the Search Training Modal.

A preference is available so administrators can switch back to Traditional Search (SQL) whenever necessary. To access this preference, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > ASSIGNMENT TOOL PREFERENCES. Scroll down and turn on the **Enable Enhanced Search on Select Training** toggle to enable Enhanced Search.

How Does this Enhancement Benefit My Organization?

It enables better, faster searches, and returns relevant results.

Considerations

- The current search results are sorted alphabetically. However, the Enhanced Search results are displayed by Relevance by default.
- The Enhanced Search prioritizes learning objects localized to the language you currently have set up as the display language.
- In most cases, a newly created or updated learning object is updated within Enhanced Search results in 15 minutes or less with few exceptions.
    - Training was included as a part of a large data ingestion, or a large bulk update was completed. In this case, the time for the update to be made available within search results may depend on the amount or the size of the change.

- The training was created or updated at the exact moment of an update to the data set. In this case, we would expect the learning object to be available beyond the base 15-minute time-frame.

Frequently Asked Questions (FAQs)

What information is used by Enhanced Search to display search results?

On other pages, such as the Course Catalog and Learning Search, Enhanced Search searches across Title, Description, and Keywords. For the Search Training Modal in the Learning Assignment Tool, Enhanced Search only considers the Title when completing a search.

Are we able to change the search framework if we choose?

Yes. Administrators can change the search framework from Enhanced Search to Traditional Search if you choose or if it is a better option for your portal. This can be done by navigating to Assignment Tool Preferences and scrolling down to “Enable Enhanced Search on Select Training.”

Why isn’t the description filter being supported in Enhanced Search?

Our data shows that the description filter is rarely used in this area. If you require the description filter, please update the preference described above to disable Enhanced Search.

How will I be able to tell if my portal has been updated?

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

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

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

Implementation

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

The update may take up to 10 business days to be present after their respective release dates in the Stage and Production portals.

Permissions

The following existing permissions apply to this functionality:

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

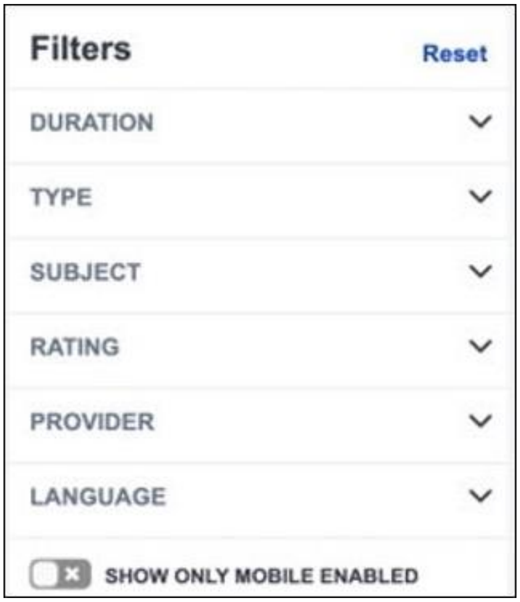
Assignment Tool Preferences	Grants access to Assignment Tool Preferences where an administrator can activate the new Assignment Tool and configure the processing options and settings to create Learning Assignments. This permission cannot be constrained. This is an administrator permission.	Learning -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

Learning Search - Filter Configuration - General Availability

As part of the November '23 release, the Filter Configuration for Learning Search is now Generally Available (GA). The Filter Configuration for Learning Search was introduced as an Early Adopter enhancement with the July ’23 Release.

With this enhancement, the administrators can enable or disable filters for the Learning Search page not used within a portal or a division.

To access Learning Search, go to LEARNING > LEARNER HOME.



Configure the Learning Search filters by visiting Learning Search Preferences. To access Learning Search Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > LEARNING SEARCH PREFERENCES.

How Does this Enhancement Benefit My Organization?

The administrators have greater customization capabilities on Learning Search.

Frequently Asked Questions (FAQs)

What filters can be configured or changed?

Before this feature, only the Modality filter could be enabled or disabled based on the administrator's wishes. After this release, the following filters can be enabled or disabled: Duration, Types, Subjects, Rating, Provider, Language, Mobile Enabled, and Skills (Capabilities).

What happens to the links to the filtered searches if that filter is disabled?

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

Should we consider the Skills (Capabilities) Filter also to be Generally Available?

No. The Skills (Capabilities) Filter which was first introduced in the July ’23 Release as a brand new Learning Search filter is still considered as an Early Adopter.

Are there any functional changes coming as a part of this release?

No. No changes are being announced other than the Filter Configuration that is Generally Available (GA). All filters, except Skills (Capabilities), are enabled by default. Customers can disable the filters not in use on their portal, or re-enable the filters that were previously disabled. If you have already configured a filter to be enabled or disabled, that setting will continue to be respected. Cornerstone will make no configuration changes.

Permissions

The following existing permissions apply to this functionality:

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

Reporting Fields - Learning

The following enhancements have been made to Learning Reporting:

- Additional user-specific constraints available for Reporting 2.0 Certification Removal History permissions
- Reporting 2.0 "Greatest Registration Number" field output change to Bit type (Yes/No)
- New Reporting 2.0 Report Type: Certification Approval History Report
- New Reporting 2.0 Report Type: ILT Interest Tracking Report

Additional user-specific constraints available for Reporting 2.0 Certification Removal History permissions

Customers want to constrain certification removal history reporting further with additional user constraints

Granular permission "Reporting - Learning - Certification Removal History - View" and Report level permission "Reporting - Learning - Certification Removal History Report - View" can now be constrained using the following additional constraints:

- Restrict to User’s Self Only
- Restrict to User Self and Subordinates
- Restrict to User (e.g., specifying a user)

Reporting 2.0 "Greatest Registration Number" field output change to Bit type (Yes/No)

The "Greatest Registration Number" field output is updated to display as "Yes" or "No" rather than "1" or "0" to ensure consistency and accuracy across all aspects of the Cornerstone platform.

This change impacts all Reporting 2.0 reports that contain the "Greatest Registration Number" field. "0" is replaced with "No," and "1" is replaced with "Yes" in all report outputs, including FTP, email delivery, scheduled reports, dashboards, and calculated fields. This change impacts both existing and new reports. This change does not affect field values in filters because they are already consistent with the actual data type and already display Bit values ("Yes" or "No").

New Reporting 2.0 Report Type: Certification Approval History Report

Access the new Reporting 2.0 Certification Approval History report type for historical pending or past certification approval requests.

The following new fields are available to use in Reporting 2.0 with the Certification Approval History report type:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY
Owner	This field displays the name of the certification owner who approved or denied the request.	Text	Learning	Certification Approval History
Requester	This field displays the user who requested the certification approval.	Text	Learning	Certification Approval History

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY
Certification Title	This field displays the title of the certification that requires approval.	Text	Learning	Certification Approval History
Comment	This field displays any comments provided during the approval or denial process.	Text	Learning	Certification Approval History
Decision	This field displays whether the certification approval request was approved or denied.	Text	Learning	Certification Approval History
Decision Date	This field displays the date the approval or denial decision was made.	Date	Learning	Certification Approval History
Request Date	This field displays the date the certification approval was requested.	Date	Learning	Certification Approval History
Request Type	This field displays the type of approval request that was made.	Text	Learning	Certification Approval History

The following new granular permissions apply to the Certification Approval History report type:

- Reporting - Learning - Certification Approval History - View
- Reporting - Learning - Certification Approval History - Manage

The following new report-level permissions apply to the Certification Approval History report type:

- Reporting - Learning - Certification Approval History Report - View
- Reporting - Learning - Certification Approval History Report - Manage

The View permissions can be constrained using the following constraint types:

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

New Reporting 2.0 Report Type: ILT Interest Tracking Report

Use the new Reporting 2.0 ILT Interest Tracking report type to report on users who have shown interest in an event when no session is available.

The following new fields are available to use in Reporting 2.0 with the ILT Interest Tracking report type:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE	SOLUTION/SUITE	ENTITY
Interest Location	This field displays the OU location the learner selected when indicating interest.	Text	Learning	ILT Interest Tracking
Interest location ID	This field displays the ID of the OU location the learner selected when indicating interest.	Text	Learning	ILT Interest Tracking
Interest comments	This field displays any comments the learner entered when indicating interest.	Text	Learning	ILT Interest Tracking
Interest location parent	This field displays the parent of the OU location the learner selected when indicating interest.	Text	Learning	ILT Interest Tracking
Interest location parent ID	This field displays the ID of the parent of the OU location the learner selected when indicating interest.	Text	Learning	ILT Interest Tracking
Interest date submitted	This field displays the date on which the learner indicated interest.	Date	Learning	ILT Interest Tracking

The following new granular permissions apply to the ILT Interest Tracking report type:

- Reporting - Learning - ILT Interest Tracking - View
    - Restrict to User
    - Restrict to User Self And Subordinates
    - Restrict to OU
    - Restrict to User's OU
- Reporting - Learning - ILT Interest Tracking - Manage
- Reporting - Learning - ILT Interest Tracking - Training - View
    - Restrict to Training Item
    - Restrict to Training Provider
    - Restrict to Training Type
    - Restrict to Instructor
    - Restrict to Facility
- Reporting - Learning - ILT Interest Tracking - Training - Manage

The following new report-level permissions apply to the ILT Interest Tracking report type:

- Reporting - Learning - ILT Interest Tracking Report - View
    - Restrict to User
    - Restrict to User Self And Subordinates
    - Restrict to OU
    - Restrict to User's OU
    - Restrict to Training Item

    - Restrict to Training Provider
    - Restrict to Training Type
    - Restrict to Instructor
    - Restrict to Facility
- Reporting - Learning - ILT Interest Tracking Report - Manage

Implementation

This functionality 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.

SF-182 Enhancements for Approvals and Completions

SF-182 Enhancements for Approvals and Completions

Prior to this enhancement, any edits or completions that resulted in incomplete workflows for approved and completed SF-182 forms could impact the funding approval and the documentation of the completion of required training hours.

With this enhancement, when editing an approved SF-182 form, the approvers can allow a learner to edit the approved form. The learners allowed to edit can re-submit the form while maintaining the existing approvals.

The key features of this enhancement are:

- A prompt is generated while editing an approved form to determine if a learner can edit the SF-182 form.
- The learners can edit an approved SF-182 form without impacting the completion workflow.
- Marking the SF-182 forms as complete from the training details finishes the completion workflow process.

How Does this Enhancement Benefit My Organization?

- The SF-182 forms are configurable by division to allow editing of approved and completed forms without resulting in incomplete workflows.
- Saves time by enabling approvers to mark SF-182 forms complete from the training details page.
- The learners who can edit the SF-182 forms can provide additional information or make corrections.

Frequently Asked Questions (FAQs)

If an approved SF-182 form is edited and saved, and the user is allowed to edit, will the SF-182 form go back through the approval workflow?

No, the learner can edit and save; the form will not go back through the approval workflow. Any approver that allows a learner to edit the approved form should review the form to verify the changes.

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
SF-182 Administration	Grants ability to view SF-182 requests for populations of users (based on constraints), approve SF-182 forms at any step of the process, and view the link for managing SF-182 specific vendors for their organization. (Governmental clients). This is an administrator permission.	Limited Use/Obsolete
SF-182 Requests - Manage	Grants ability to view SF-182 requests for a population of users based on constraints. If this permission is added to the dynamic Manager security role, the permission will automatically be constrained to self	Limited Use/Obsolete

	and subordinates. If the SF-182 approver is a manager and should not be constrained to just self and subordinates, please create a separate security role and add the SF-182 Requests Manage permission to that role with any needed constraints.	
SF-182 Requests - Complete	Grants ability to mark complete SF-182 requests for a population of users based on constraints (e.g., managers can complete requests of their subordinates, etc.). This permission can be constrained by the following: User Self and Subordinates, User's Subordinates, User's Division, User's Corporation, User's Position, User's Grade, User's Cost Center, User's Location, User's Group, User Custom OUs, Division, Position, Grade, Cost Center, Location, Group, Custom OUs, Self Registration Groups, User's Self Registration Groups.	Limited Use/Obsolete

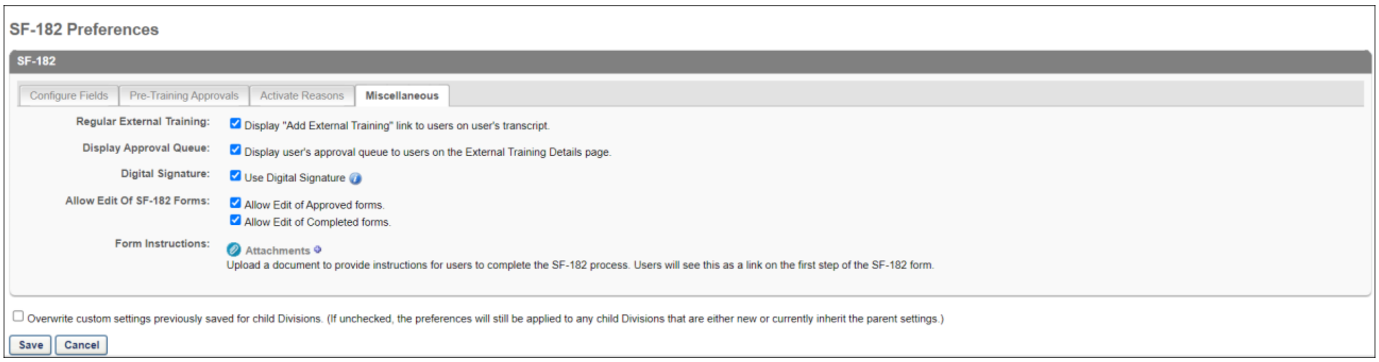
Editing Approved SF-182 Forms

Previously, when **Allow Edit of Approved forms** was enabled, the learners could edit the SF-182 form but could not re-submit the form and the approval workflow would be incomplete.

Now, the approver is prompted with the message "This form has been previously approved. Allow the learner to edit and re-submit the form from their transcript?" when editing an SF-182 form. If the approver clicks **YES**, it allows the learner to edit and re-submit the form. If the approver clicks **NO**, it saves the changes, but the learner cannot edit the form from their transcript.

The approver can also cancel and not save any changes when editing an SF-182 form. In such a case, the form does not undergo the approval workflow again and retains existing approvals.

Note: *This functionality is powered by a backend setting that enables the LMS Transcript Status Tracking. The backend setting is enabled by default.*



Marking Complete from Training Details

Previously, when an approver viewed the training details of the SF-182 form and clicked Mark Complete, the form, and the workflow would remain incomplete unless the approver used the bulk mark complete functionality. Now, when an approver clicks Mark Complete, the SF-182 form status and the training status is marked as Completed. The completion workflow is also fully completed.

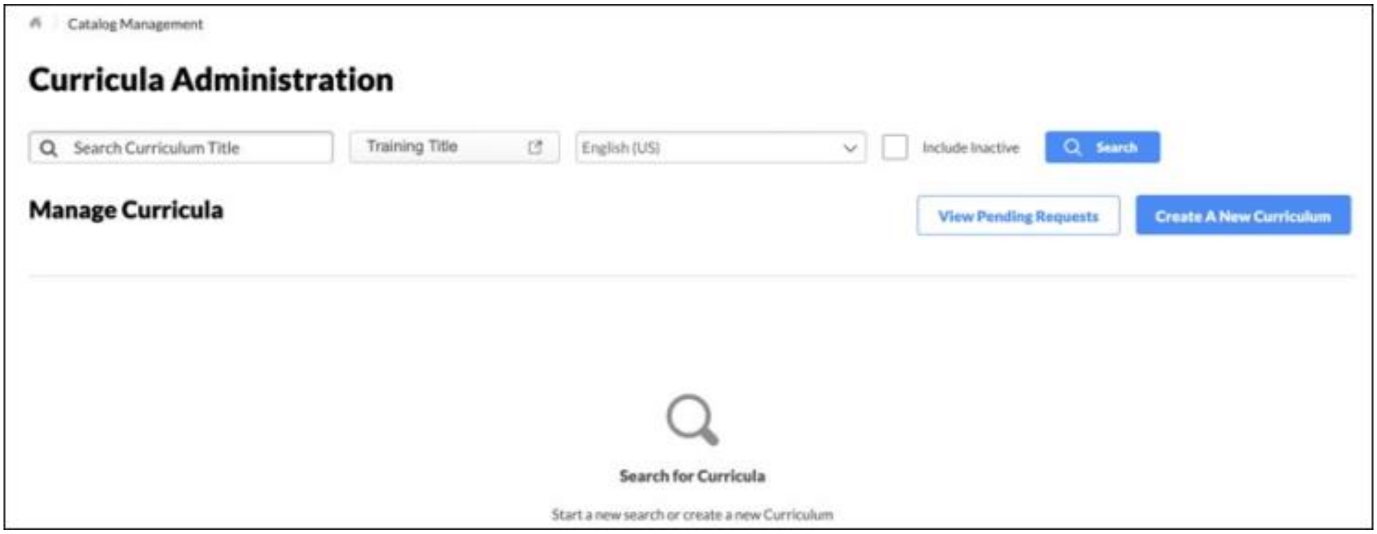
Also, when an approver edits a completed form and saves it, the completion workflow is finished this time.

Stop Auto-Populating Results in Administrative Search (Early Adopter)

Prior to this enhancement, the initial loading time of pages in portals with a large amount of training objects was frequently delayed.

With this enhancement, the administrators can control the initial load of results on a page, reducing the time a page takes to load with all the results. It helps the administrators to search faster as they are not forced to wait for all the results to load before they can perform a search.

A preference is available in Feature Activation Preferences to enable or disable the functionality. When the preference is enabled, various administrative search pages display an “empty state” upon initial load. The administrators can still search for the full catalog by conducting an “empty search.”



The list of administrative pages includes the following:

- Manage Sessions
- Curriculum Administration
- Material Administration
- Test Administration
- Question Administration
- Certification Administration
- Video Administration
- Manage Learning Assignments

To enable the preference, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Disable Auto-Populating Results in Administrative Search** section, click **ACTIVATE**.

How Does this Enhancement Benefit My Organization?

The administrators utilizing various search pages can complete searches faster, reducing waiting time and enhancing productivity.

Frequently Asked Questions (FAQs)

Why has Cornerstone allowed us to remove search results from displaying by default?

We strive to improve the performance and efficiency of all our portals. Our data also tells us that users visiting these pages typically enter search criteria before accessing a learning object. Allowing customers not to have search results by default improves initial page load times and will enable us to improve administrators' efficiency.

Am I able to change this preference if I decide?

Yes. Administrators can manage this preference through the Feature Activation Page. However, this functionality is not activated by default in production environments. Cornerstone will consider enabling this functionality by default in future releases.

Is any other functionality affected by this enhancement?

No. No other changes are made as a part of this enhancement.

The Manage Events search page already received an enhancement where search results are not displayed by default. Is that page also affected?

The manage events page is not affected by the functionality of the preference.

Why is this functionality being released as an early adopter? Is there any new functionality coming?

There is no new functionality currently planned with this initiative. However, we want to hear feedback from our customers regarding this change. Any information regarding how this change is received or what other information would be helpful on these pages could help us inform our roadmap in the future.

Implementation

This functionality is available for all organizations using the Learning module. Activation is required in Production portals. No activation is required in Stage portals.

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

Upgrade Excel Format of Exports in ILT

Prior to this enhancement, the Excel download options offered in Cornerstone were HTML with an Excel extension or older versions of Excel. This would often result in a warning message when opening the file, "The file format and extension of … don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?".

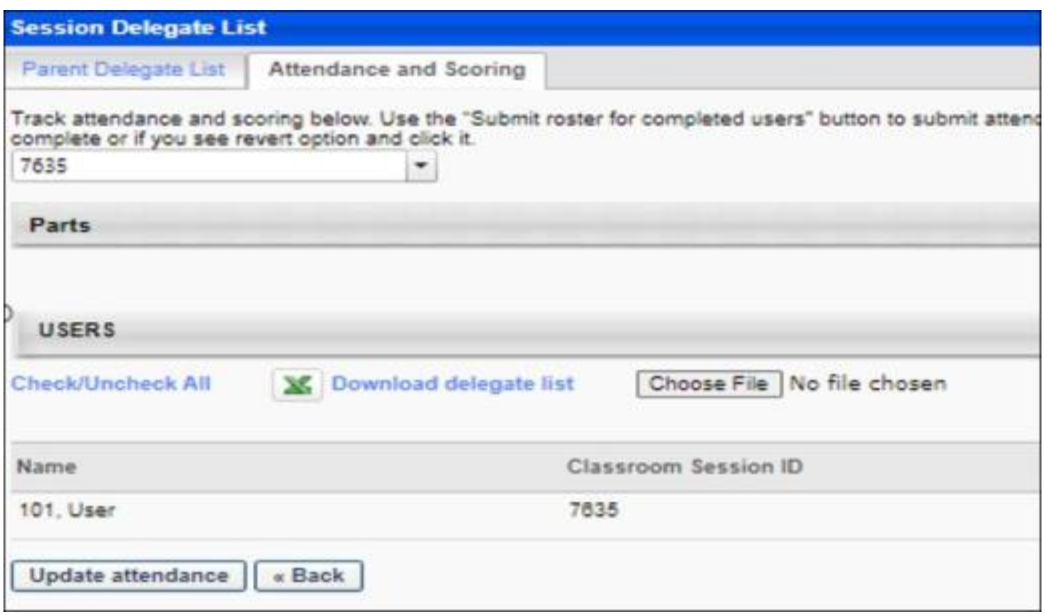
With this enhancement, Excel download options available in ILT have been upgraded with the .xlsx extension to make downloads easier and safer to use for administrators and instructors. The XLSX extension has replaced the XLS extension for the following reasons:

- The XLSX is more robust than the binary format-based XLS.
- The openness of the Office XML Format (.xlsx) translates to more secure and transparent files.
- The XLSX are of smaller file size when compared to XLS.

The enhancement impacts the **EXPORT TO EXCEL** functionality in the following areas:

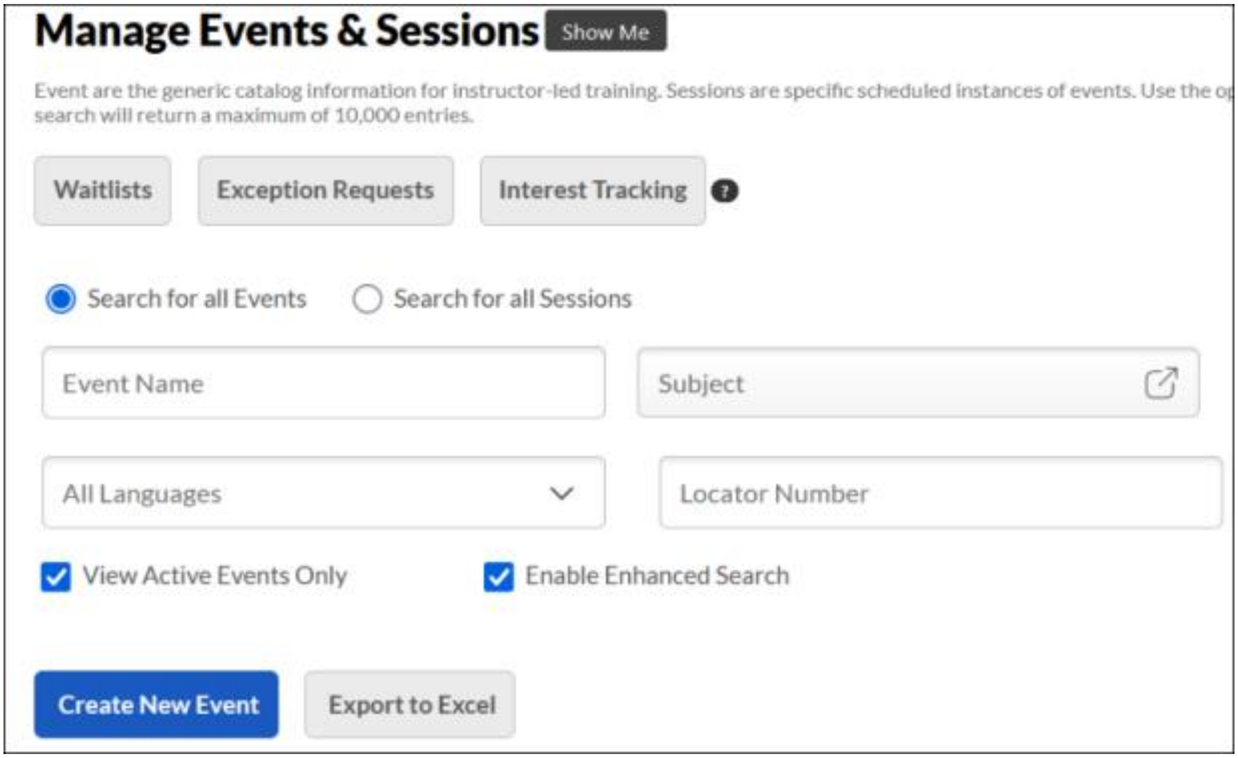
- Download 'Bulk add user template' (ILT > ROSTER > PARENT ROSTER). The file format update is for both the 'Download Bulk Add Users' template and the error file. For more information about the Bulk Add user template, *See Session Roster - Bulk Add Users.*

- Roster or Download roster from the attendance and scoring page (ILT > ROSTER). For more information about the Download Roster, *See Session Roster - Attendance and Scoring Tab.*



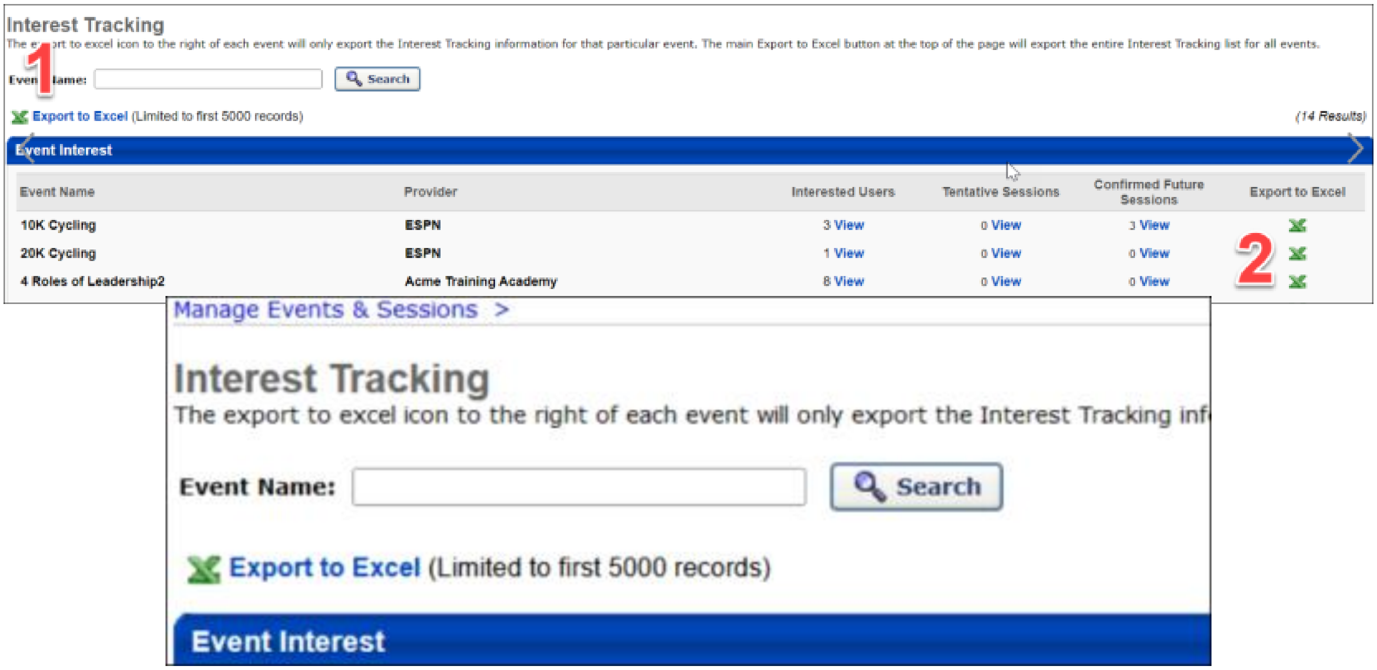
- Export list of events (ILT > MANAGE EVENTS AND SESSIONS). For more information about the export formats, *See Manage Events and Sessions.*

- Export list of sessions (ILT > MANAGE EVENTS AND SESSIONS OR SESSIONS TAB). For more information about the Manage Events and Sessions export formats, *See Manage Events and Sessions.* The content of the export remains identical.

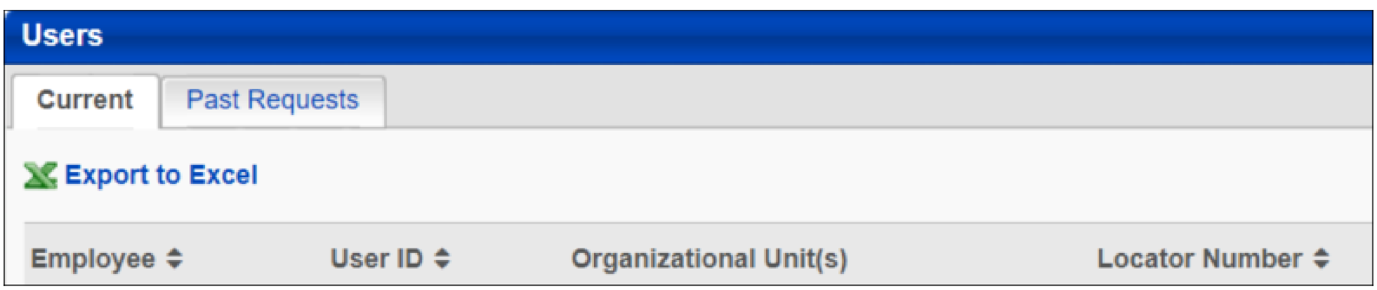


- Download Interest tracking (ILT > MANAGE EVENTS AND SESSIONS > INTEREST TRACKING). There are two types of exports:
    - Export to Excel for all Events
    - Export to Excel for one Event

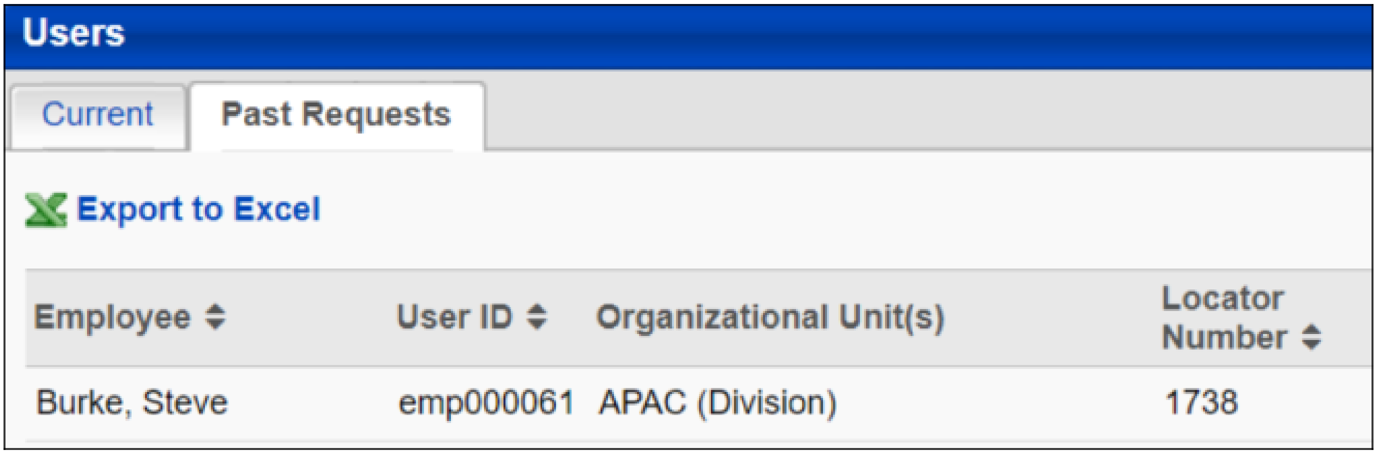
The content of the export remains identical. For more information about the Interest Tracking export formats, *See Interest Tracking.*



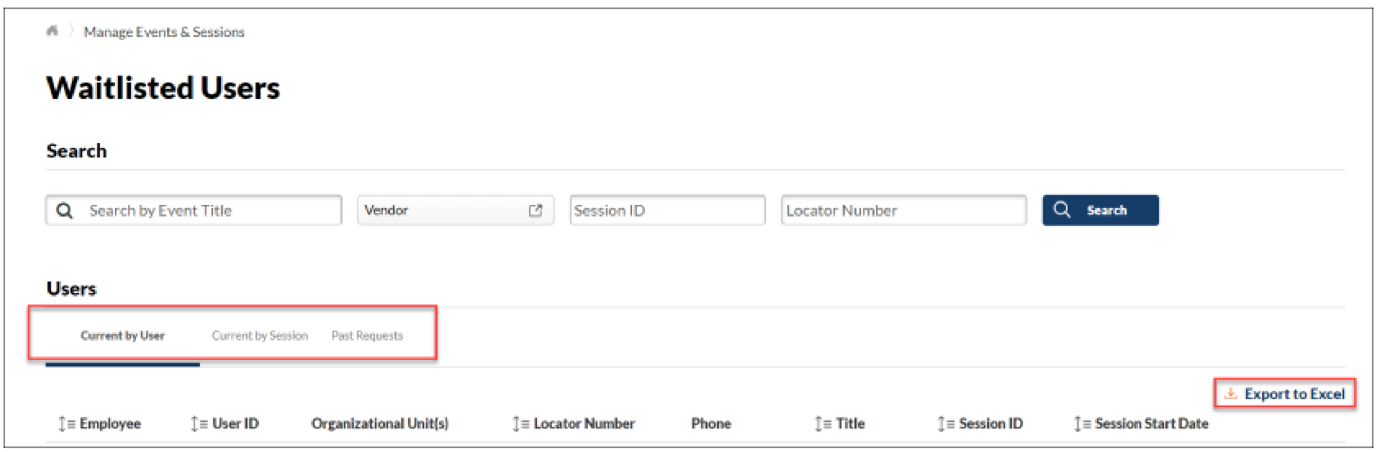
- Export current user requests (ILT > MANAGE EVENTS AND SESSIONS > EXCEPTION REQUESTS > CURRENT REQUESTS).



- Export past user requests (ILT > MANAGE EVENTS AND SESSIONS > EXCEPTION REQUESTS > PAST REQUESTS)



- Current by User (ILT > MANAGE EVENTS AND SESSIONS > WAITLISTS > WAITLISTED USERS > CURRENT BY USER)
- Current by Session (ILT > MANAGE EVENTS AND SESSIONS > WAITLISTS > WAITLISTED USERS > CURRENT BY SESSION)
- Past Requests (ILT > MANAGE EVENTS AND SESSIONS > WAITLISTS > WAITLISTED USERS > CURRENT BY SESSION)



How Does this Enhancement Benefit My Organization?

The XLSX extension is easier and safer to use.

Implementation

This functionality is automatically enabled in both Stage and Production portals for all organizations using the Learning module.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
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
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	Learning - Administration

Interest Tracking - Manage	Grants ability to manage Interest Lists for instructor led training events, including adding and removing users from interest lists. This permission works in conjunction with Events - View, and Interest Tracking - View permissions. This is an administrator permission.	Learning - Administration
Interest Tracking - View	Grants view-only access to instructor led training Interest Lists, via the ILT Events and Sessions screen, enabling the user to view the Interest Lists for various ILT events. This permission works in conjunction with the Events - View permission. This is an administrator permission.	Learning - Administration

User Interface Modifications for Learning Administration Pages (Early Adopter)

User Interface Modifications for Learning Administration Pages (Early Adopter)

This collection of enhancements for the November ’23 release is part of the larger initiative to provide a modern, consistent, improved administrator experience to our customers. We are improving the user interface (UI) of previously released Learning Administration pages based on customer feedback. You can ensure they are right for your team by taking a test drive on stage before implementing them in production. You can introduce these new features in production via Learning Feature Activation Preferences. If you want to turn off these features and revert back to your prior experience in production or stage, you can disable them.

With this enhancement, the following pages are further upgraded:

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

How Does this Enhancement Benefit My Organization?

- The new features ensure reduced scrolling, optimizes the use of white space, clear designation of action items.
- Presents modernized, more intuitive learning administration pages and training request approval pages.

Considerations

- We have not introduced any new pages with this release.
- With these interface changes, no functionality changes are included. No functionality is added or removed.

Frequently Asked Questions (FAQs)

Can I disable or enable individual pages?

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

Can we enable or disable feature preferences at any time?

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

How does customization and branding work with the page modifications?

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

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

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

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

- ILT Roster

Will custom integrations work with the new pages?

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

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

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

Did you make any changes to address accessibility?

No, we did not add any new accessibility updates, but we have a team focused on accessibility who is reviewing and making changes to update accessibility.

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

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

Implementation

All pages are automatically enabled in stage portals on October 18. Activation is required in production portals for all organizations using the Learning module. Customers who have activated the previously released pages with new UI in production will continue to see these pages with new changes applied.

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

Permissions

The following existing permissions apply to this functionality:

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

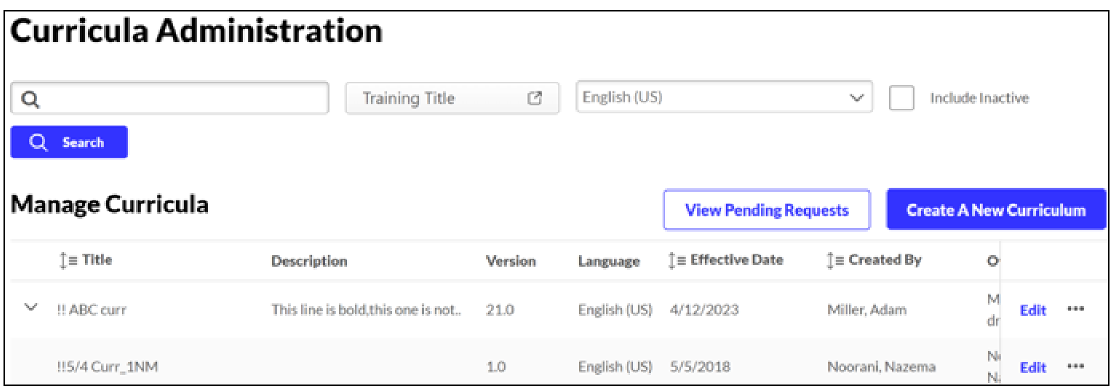
New User Interface Modifications

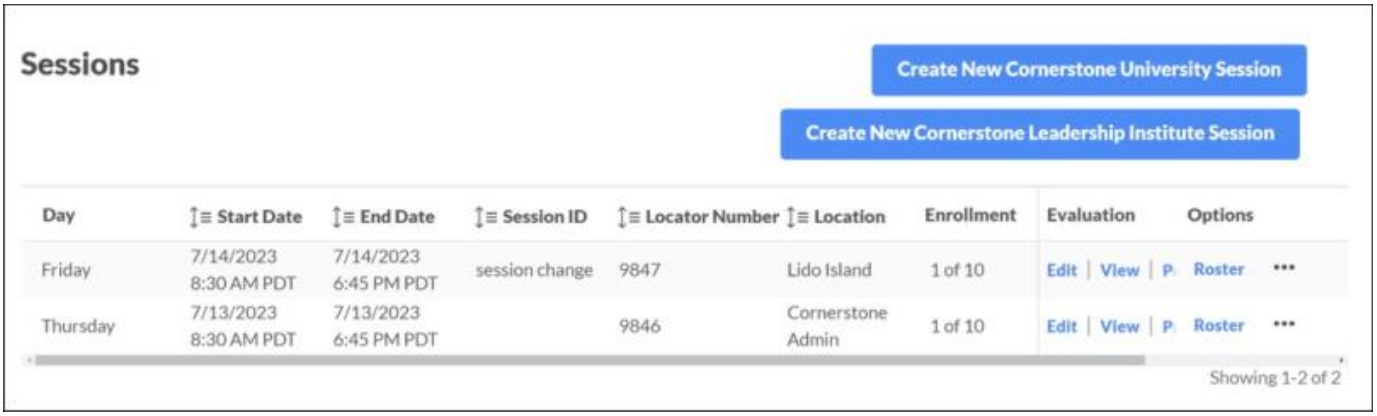
We have introduced a new UI design for the frequently used learning administration pages to improve the look and feel and make the actions on these pages clearer. All the updates were done based on customer feedback. The key features of the new UI are:

- Horizontal scroll bar on pages with table grids to support zooming and lower resolution.
- Freezing of action columns during horizontal scrolling so actions can be accessed without scrolling far right.
- Vertical scroll bar to use default browser vertical scroll bar.
- Course Catalog sort icons to display colors and direction to show sort applied.
- Course Catalog and Test Administration pages to use a chip to differentiate between Active and Inactive items.
- Course Catalog to use a chip to highlight Draft items.

The pages with Horizontal Scrolling and freezing of action columns

- Course Catalog main page
- Curricula Administration main page
- Materials Administration main page
- Certification Administration main page
- Certification Management:
    - Main page
    - Users page
- Test Engine Administration:
    - Main page
    - Question Bank
- Training Request Approval - View Pending Requests
- ILT Manage Events and session:
    - Search for all events
    - Search for all sessions
- ILT Roster:
    - Parent Roster
    - Assignments




Sessions

Create New Cornerstone University Session

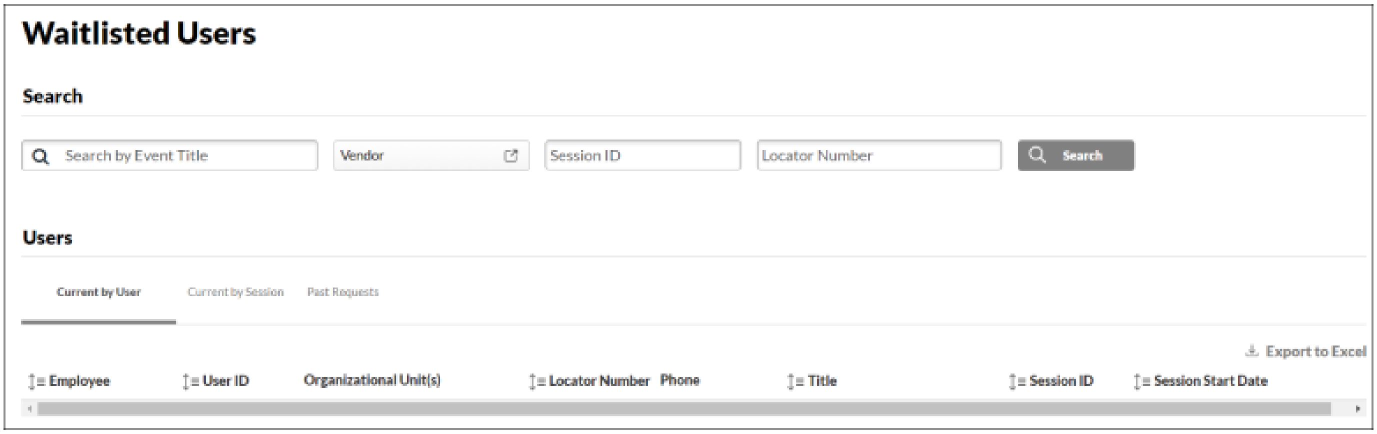
Create New Cornerstone Leadership Institute Session

Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Options	
Friday	7/14/2023 8:30 AM PDT	7/14/2023 6:45 PM PDT	session change	9847	Lido Island	1 of 10	Edit | View | P	Roster	•••
Thursday	7/13/2023 8:30 AM PDT	7/13/2023 6:45 PM PDT		9846	Cornerstone Admin	1 of 10	Edit | View | P	Roster	•••

Showing 1-2 of 2

The pages with only Horizontal Scrolling

- Course Catalog batch edit
- Curricula Administration and
  - View pending requests
  - View past requests
  - View users page
- Certification Management - Edit Due date
- Materials Administration - View users
- Deep Links:
  - Base URL
  - Page URL
  - Deep Link Generator
- ILT Manage Events and sessions
  - Waitlists - Current by user
  - Waitlists - Current by user - Past Requests
  - Exception Requests - Current
  - Exception Requests - Past
  - Interest Tracking
  - Interest Tracking - Tentative Sessions and Confirmed Future
  - Interested User details
- ILT Roster - Attendance and Scoring



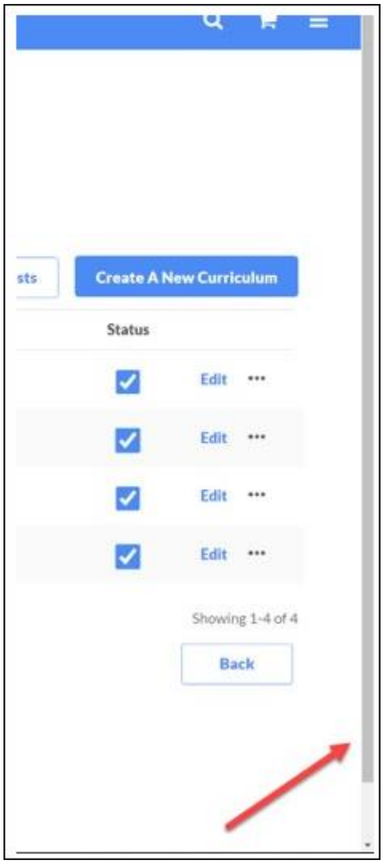
The pages with Vertical Scrolling using default browser

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

Legacy UI

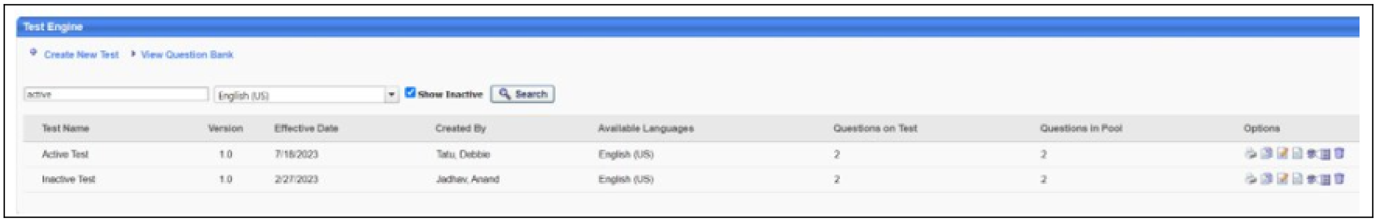
sts
Create A New Curriculum
Status
Edit
Edit
Edit
Edit
Edit
Showing 1-5 of 5
Back

New UI

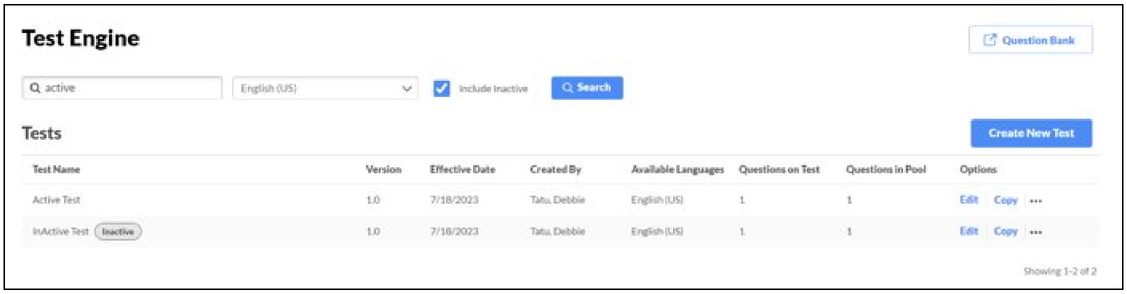


Course Catalog and Test Administration pages displaying Inactive items

Legacy UI

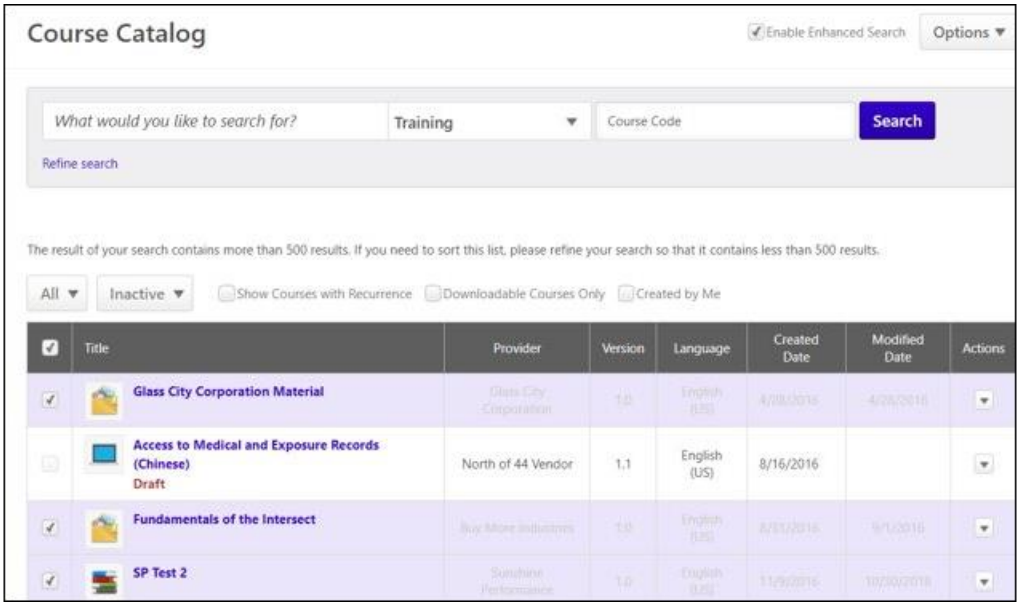


New UI

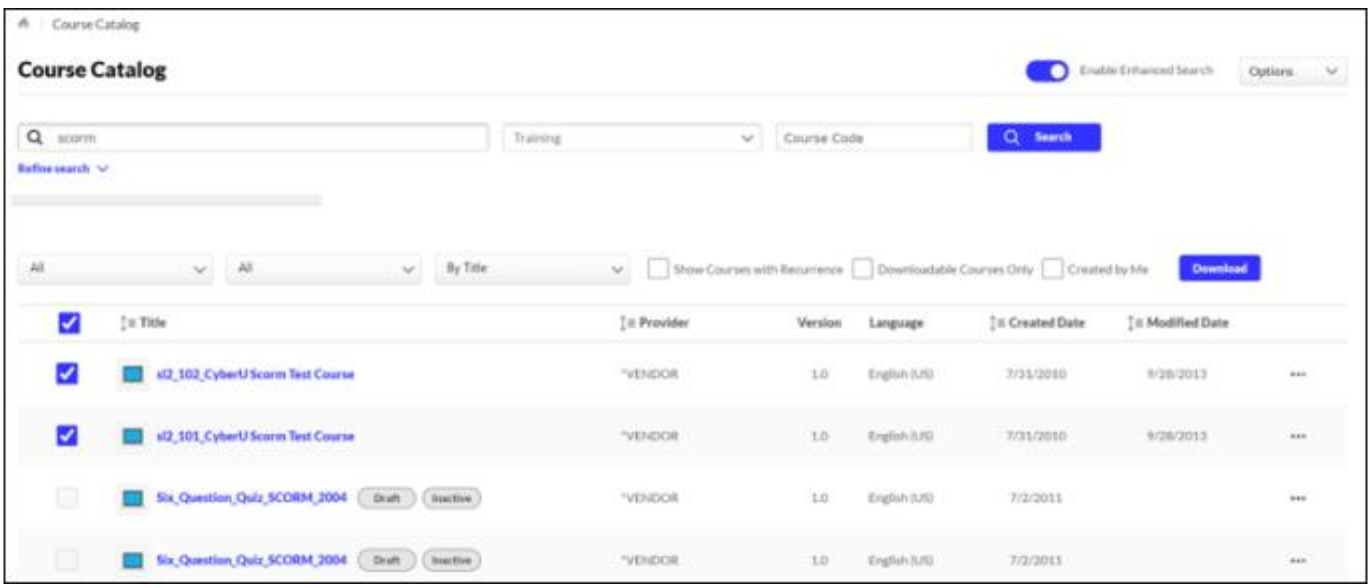


Course Catalog - Active and Inactive Draft

Legacy UI



New UI



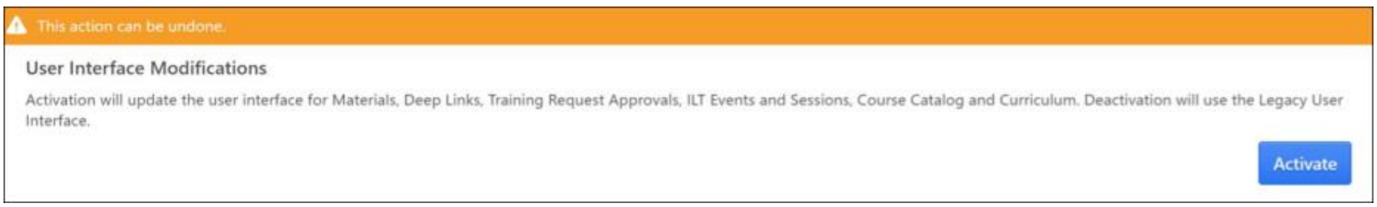
Feature Activation Preferences - User Interface Modifications Activation

All UI preferences are enabled automatically in Stage environments on October 18. All UI preferences can be enabled in Production environments by customers through Feature Activation. The following pages are enabled with a single preference:

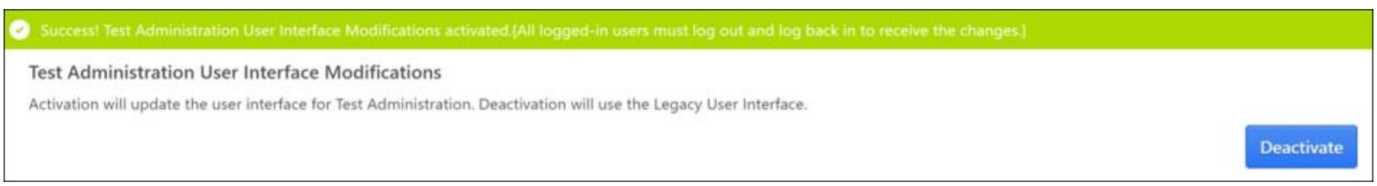
- ILT Events and Session Administration
- Materials Administration
- Course Catalog Administration
- Curricula Administration
- Deep Link Administration
- Training Request Approval

ILT Roster, Test Engine Administration, and Certification Administration are enabled with individual preferences.

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



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



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

Versioning Dashboard Enhancements

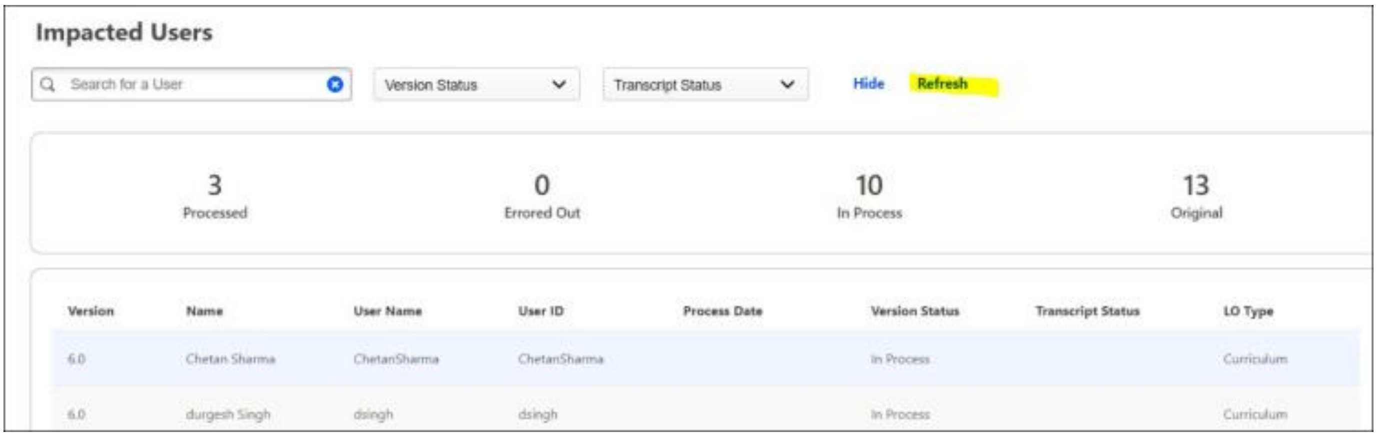
Prior to this enhancement, the administrators did not have an overview of the versioning setting choices made via user interface or Reporting 2.0. To troubleshoot versioning issues, the administrators had to open support cases that were time-consuming.

With this enhancement, the administrators get more options to utilize the Versioning Dashboard Page effectively due to the following functionalities:

- **The Refresh link**

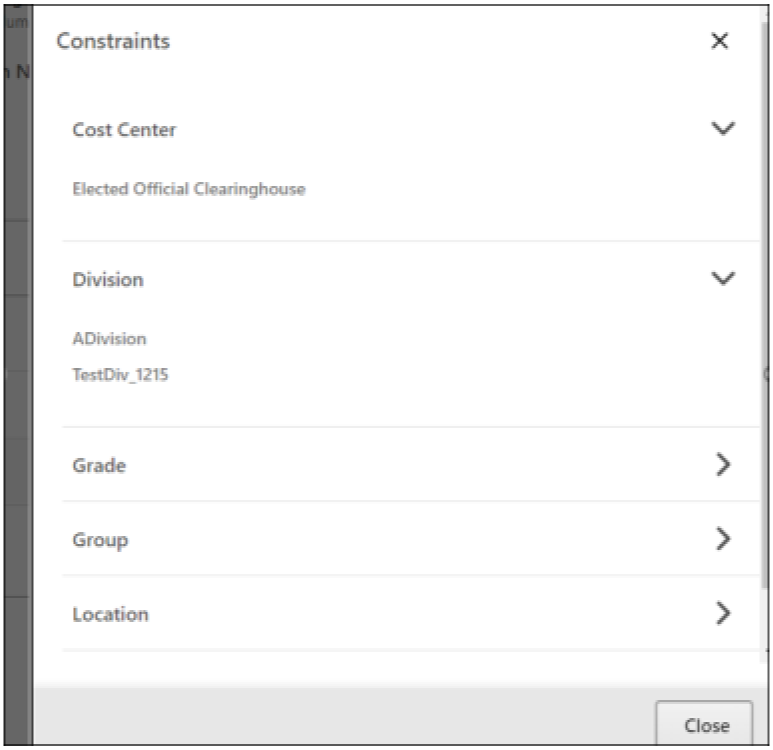
A Refresh link is available in the Impacted Users section. It is visible when the versioning assignment is in progress and hidden once the versioning assignment is complete.

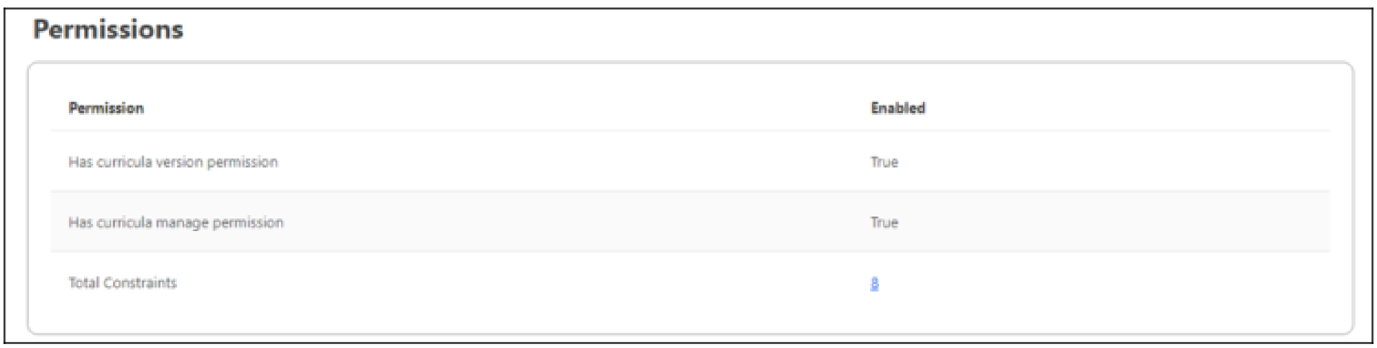
For example, if an administrator starts processing from a curriculum version 1 to curriculum version 2 where the version 2 assignment is in progress, the administrator needs to check version 2 Versioning Dashboard page for status. When the **In Process** displays 0, it means the processing is complete and the Refresh link disappears.



- **Constraints on Flyout**

The administrators can view the total number of constraints applied for the permissions at the time of Curriculum Versioning on the flyout.





- **Access Control**

A new security permission **Versioning Dashboard Page - View** to control access to the Versioning Dashboard page.

To access the Versioning Dashboard, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG > COURSE CONSOLE. Open the Options drop-down and click **VERSION DETAILS**. Alternately, go to ADMIN > TOOLS > LEARNING > ADMIN COMPLIANCE DASHBOARD > VERSIONING ASSIGNMENT SUMMARY. In the Versioning Assignment Details flyout, click **VIEW DETAILS** to open the Versioning Dashboard page. To learn more, *See Admin Compliance Dashboard.*

How Does this Enhancement Benefit My Organization?

The administrators can review Versioning options with the help of this dashboard and check if the right users got the right training version at the right time.

Considerations

- The refresh link is visible when the Versioning is in progress and hidden once the Versioning process is complete. It also works with all the applicable filters.
- The total number of constraints are clickable only if the total count of constraints is more than zero, which is now available for Curriculum Learning Objects.
- The version details link in the Course Catalog and Admin Compliance Dashboard is not visible without having the **Versioning Dashboard Page - View** permission to view the Versioning Dashboard Page.

Frequently Asked Questions (FAQs)

What if the Refresh link is not visible on the Impacted Users Section?

In such scenarios, verify if the Versioning process for the training is complete or not.

Implementation

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Versioning Dashboard Page - View	Grants ability to view the Versioning Dashboard Page. This permission cannot be constrained. This permission works in conjunction with the Course Catalog - View and Admin Compliance Dashboard - View permissions. This is an administrator permission.	Learning

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - View	Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.	Learning - Administration

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

Security Role

Upon release, the new Versioning Dashboard Page - View permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Learning - Content

Create Tool Enhancements

Create Tool Enhancements - Add Collaborators

Prior to this enhancement, all the users with access to create content could edit any content irrespective of who created it. It resulted in a lack of governance for organizations with multiple users creating content.

With this enhancement, the content authors can limit editing capabilities on their content and collaborate only with the chosen users.

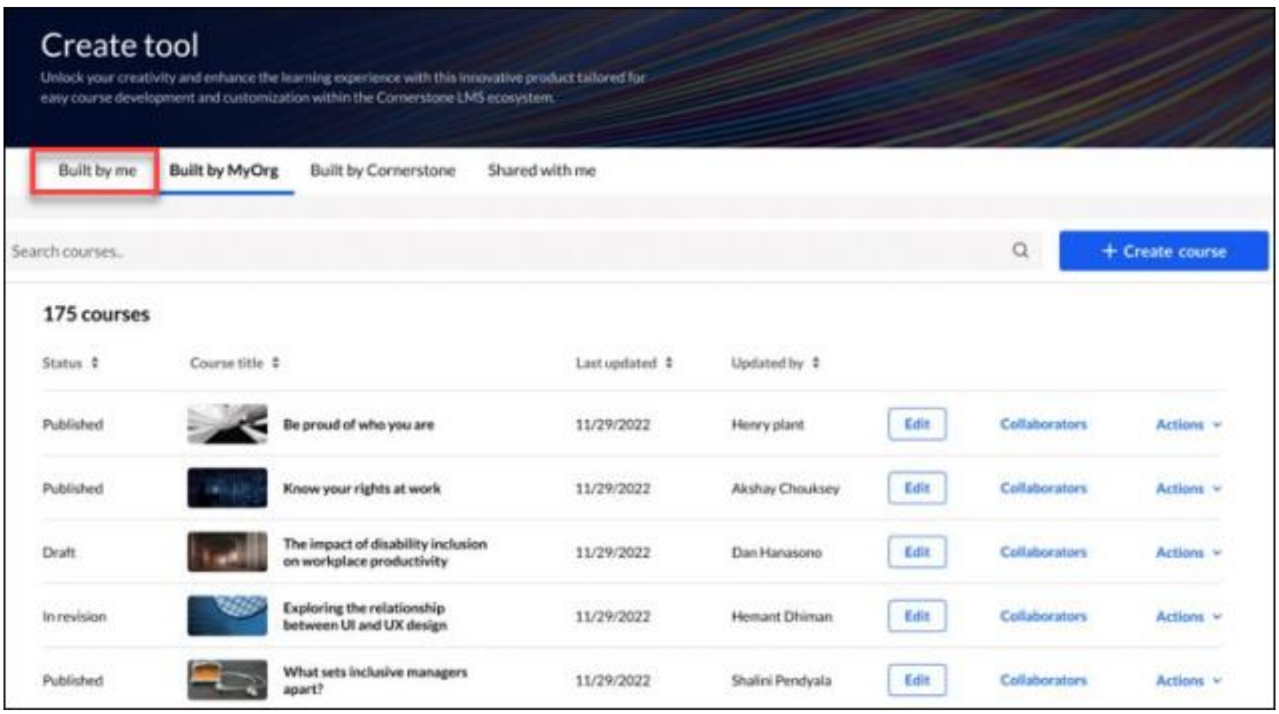
Some key features of this enhancement are as follows:

- As a content author, add collaborators from the existing Create Tool user base to your content.
- As a collaborator, edit the content in a separate view.
- The administrators can continue to edit or manage all contents for better governance while retaining authenticity.

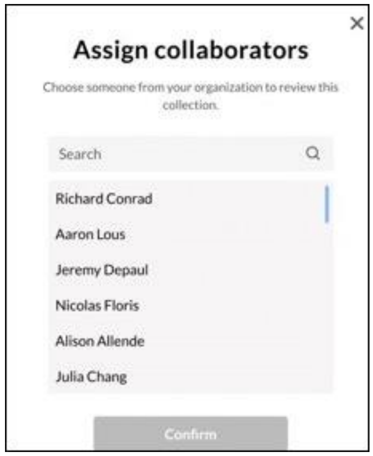
Design Note: The Create Tool User Interface (UI) has been updated with this enhancement to add collaborators.

How to add collaborators

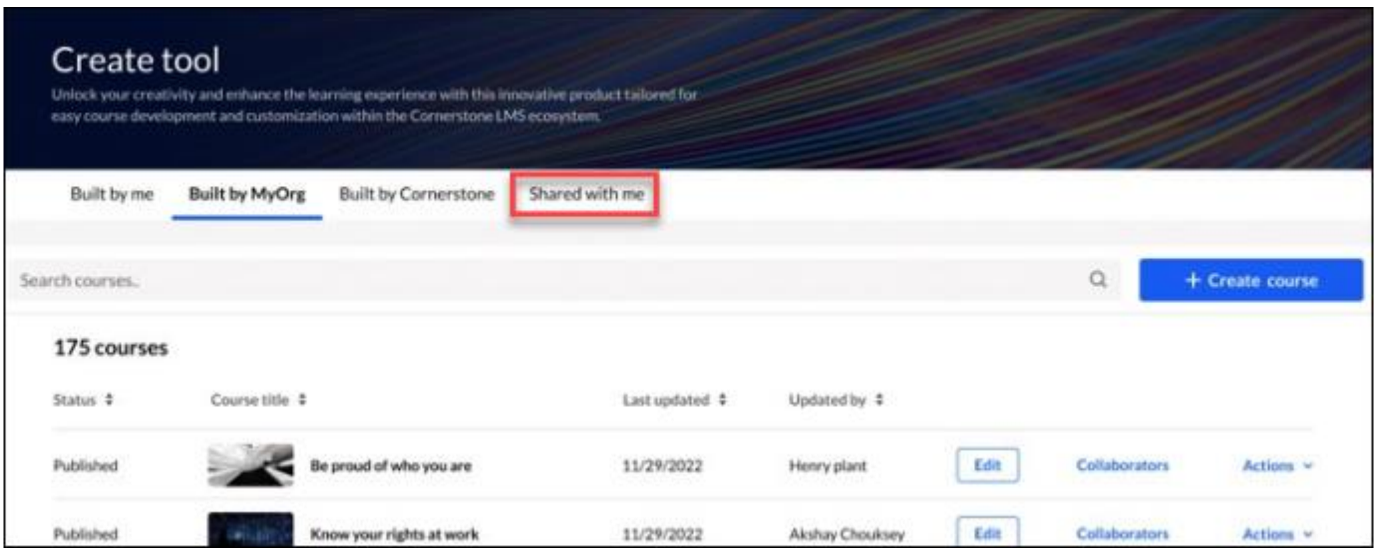
- On the Create Tool landing page, under the **Built by me** tab, click **COLLABORATORS**.



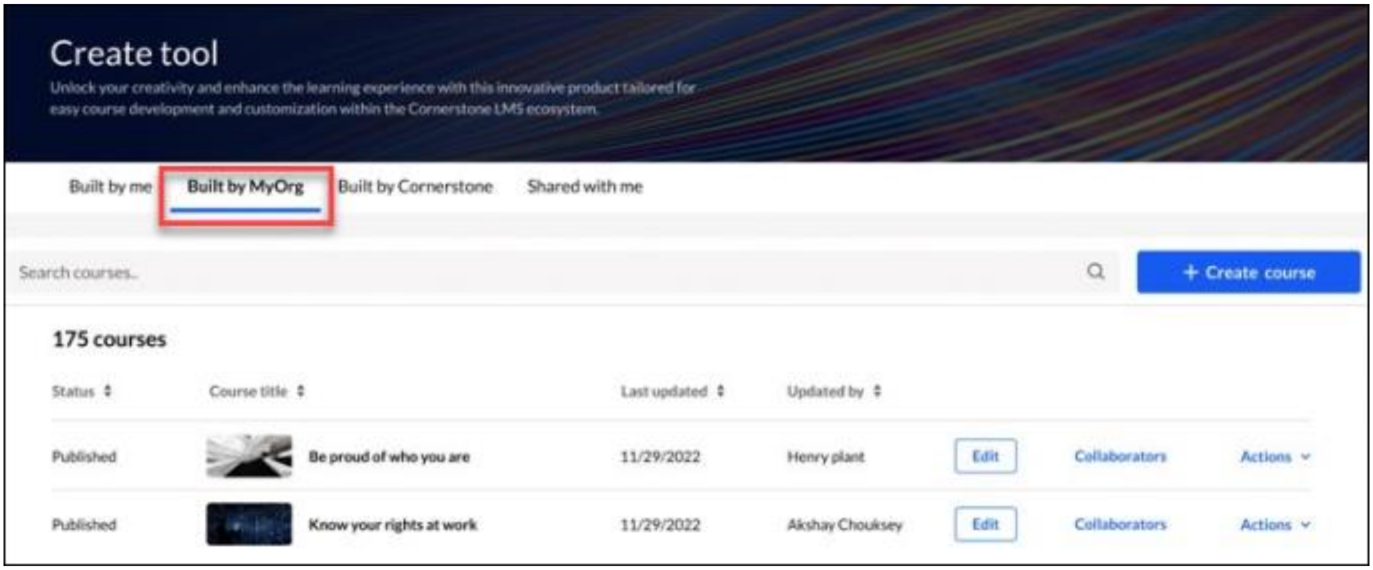
- In the **Assign Collaborators** window, add collaborators from a list of users.



- As a collaborator, edit content by going to the **Shared with me** section.



- Administrators with the 'Create Tool Admin' permission can edit and manage all the content created by the users within an organization.



Note: *You can add, remove, and view collaborators by clicking* **COLLABORATORS***.*

Considerations

- All users with the existing Create Tool permission continue to have access to the Create Tool feature. However, the editing rights are limited to the content they created, with the ability to add collaborators.
- Users must access Create Tool at least once to appear in the 'Assign Collaborator' list.
- The new permission 'Create Tool Admin' allows administrators to edit or manage content created by all users.

Implementation

Upon release, this functionality is automatically enabled in production environment for all organizations using Create Tool. This functionality is not available during User Acceptance Testing (UAT).

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Tool Admin	Grants the administrators access to Create Tool. Administrators must also have the Create Tool permission. Administrators can manage content created by anyone in the organization. This permission cannot be constrained.	Learning

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Tool	Grants access to Create Tool for content authoring. This permission cannot be constrained.	Learning - Administration

Security Role

Upon release, the new Create Tool Admin permission is automatically granted to the default System Administrator role. This permission cannot be constrained.

Create Tool Enhancements - Auto Transcription

Prior to this enhancement, generating transcripts for videos uploaded in Create Tool required manual intervention and alternate tools.

With this enhancement, the uploaded videos in the Create Tool are automatically transcribed by default. The transcription appears as closed captioning to learners during video playback.

How Does this Enhancement Benefit My Organization?

- It saves time and resources by using automatic transcription to generate closed captioning.
- It speeds up content creation.

Implementation

Upon release, this functionality is automatically enabled in production environment for all organizations using Create Tool. This functionality is not available during User Acceptance Testing (UAT).

Deprecation of Course Builder, Module Builder, Asset Importer with the November ‘23 Release

Course Builder, Module Builder, and Asset Importer were designed as authoring tools to build proprietary or customized courses. Despite low usage, there is a relatively high volume of defects reported. In addition, Cornerstone provides the Create Tool as its premium authoring tool offering.

With these points in mind, Cornerstone has decided to deprecate these products with the November '23 Release. When this occurs, customers can no longer access Course Builder, Module Builder, or Asset Importer. It is advised to export all newly created courses before deprecation takes effect!

Deprecation Milestone

November 17, 2023: Full Deprecation

Frequently Asked Questions (FAQs)

Do I need to do anything before the deprecation goes live?

Yes. If you have the courses that need to be exported from the Course Builder, it is essential to do so before November 17, 2023. Otherwise, all data stored inside the Course Builder, Module Builder, and Asset Importer will be erased.

Will I still be able to access courses created with the Course Builder after it is deprecated?

Yes. Courses from the Course Builder are created as SCORM packages and can continue being used after the deprecation goes into effect.

Can I still apply for two free licenses to the Create Tool?

Unfortunately, no. The window for the offer of free licenses has closed. You can speak to your Account Manager for more details about purchasing a license.

Is there feature parity between the Course Builder and Create Tool?

No. Create Tool has the full functionality of Course Builder.

Resources

- **Create Tool - Overview**
- **Create Tool Starter Guide**

Deprecation of (Legacy) Course Publisher with the July '24 Release

The Course Publisher has been used to upload Online Courses since 2009. In 2017, Cornerstone introduced the Content Uploader, a course upload tool used by over 81% of our customers.

The Content Uploader counters the following limitations of Course Publisher:

(LEGACY) COURSE PUBLISHER	CONTENT UPLOADER
Requires Licensing.	Unlimited Usage and permission-based.
250MB course size limit.	750MB course size limit. Edge Import can be used to upload up to 2GB per course.
Limited file and structure validation on the new version or replace, potentially causing issues with launch and progress tracking.	Enhanced file and structure validations with errors and warning to prevent issues with course launch and progressed tracking.
It does not support versioning with a course that is a different learning protocol than the previous version.	New versions can be created in any learning protocol, regardless of the original course's protocol.
No option to set automatic versioning rules, new version must be assigned manually to users.	Advanced Versioning configuration page, automatically assigns the new version to users based on the configurations made during versioning.
New version does not trigger Curriculum versioning, new version must be manually updated in Curriculum.	Curriculums with previous versions of the course will be automatically versioned, and users will get the new version based on the configurations made during the versioning.

As the Content Uploader was designed as an improved replacement for Course Publisher to address the challenges identified in Course Publisher and enhance the administrator experience for uploading, versioning, and modifying online courses, Cornerstone will deprecate the Course Publisher and upgrade all clients to use the Content Uploader.

Feature Parity Exclusions and Considerations

The Bulk Publish is currently unavailable in Content Uploader, but the feature will be available via Catalog by March '24 as a part of Content Uploader enhancement. As of now, upload courses using Edge Import Load as a workaround.

Deprecation Milestones

- November '23 Release: Deprecation announcement
- March '24 Release: Content Uploader Enhancement: Bulk Publish
- July '24 Release: Course Publisher disabled in customer portals and Content Uploader enabled in customer portals

The customers are encouraged to begin using Content Uploader prior to the deprecation in the July '24 Release. Content Uploader can be self-activated in Feature Activation Preferences. To activate, ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Activate Content Publishing Features for Online Courses section**, click **ACTIVATE**.

Resources

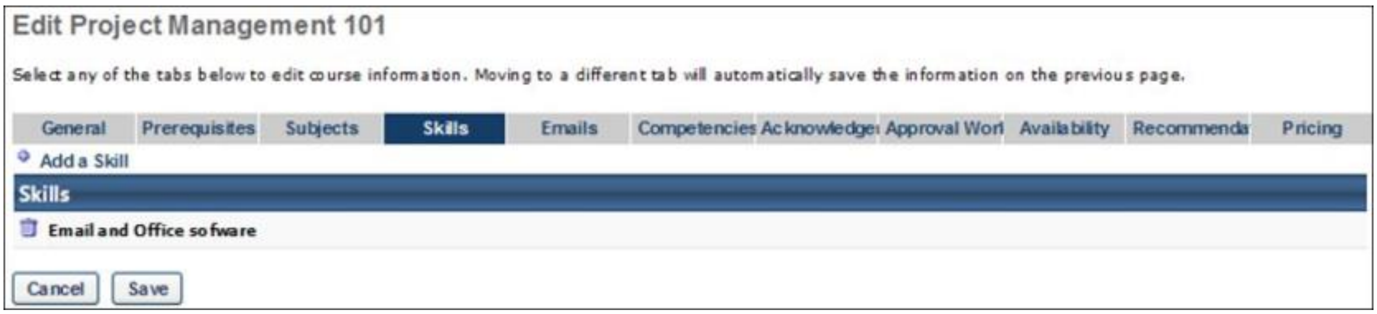
Content Uploader Tool – Create an Online Course - Overview

Hide Legacy Skills Tab on Edit Training Page UI with the November '23 Release

Prior to this deprecation, Cornerstone CSX had two systems of skills: legacy Skills and Skills (Capabilities). Legacy Skills is an older functionality, while Skills (Capabilities) is the current system powered by the machine learning of the Cornerstone Skills Graph. The CSX customer base widely utilizes skills (Capabilities) and receives constant innovation through enhancements. The legacy Skill system, which gets no ongoing support, exists as a separate functionality that uses a different dataset of skills compared to Skills (Capabilities).

With this November 2023 release, the legacy Skills tab will be default hidden from the Edit Training page UI in the Course Catalog. Administrators can contact Global Customer Support to retain the Skills tab on the UI. When the deprecation occurs with the November 2023 release, the legacy "Skills" tab will be hidden from the UI by default.

To access the legacy Skills tab in Edit Training, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG > EDIT > SKILLS.



How Does this Deprecation Benefit My Organization?

This deprecation removes the confusion caused by two distinct collections of skills related to content but also allows administrators to keep the Skills tab visible if required.

Considerations

- This deprecation only affects the display of legacy Skills on Content. No other area of CSX that uses the legacy Skills dataset is affected by this change.
- Customers can opt-out to keep the legacy Skills tab visible. To do so without disruption to the legacy Skills tab, contact Global Customer Support before November 9, 2023.

Implementation

The deprecation of this functionality is controlled by a backend setting that will be enabled by default on November 17, 2023. Support for the legacy Skill tab will be stopped from November 17, 2023.

Deprecation Milestones

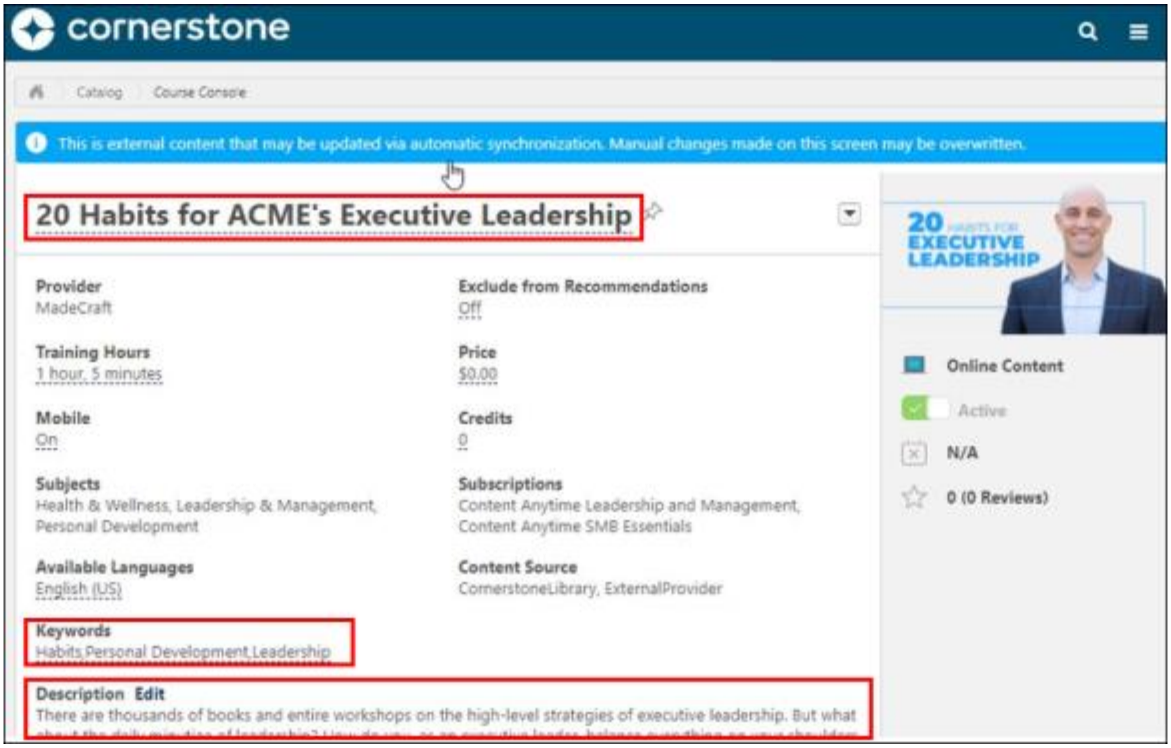
- November 17, 2023: Full Deprecation
- November 17, 2023: End of Support

Metadata Preservation for Content Subscriptions and Integrations

Metadata Preservation for Content Subscriptions and Integrations

Prior to this enhancement, customers would not receive updates to course metadata such as Title, Description, Keywords, and localizations to those fields to prevent manual changes from being overwritten by updates from their content subscriptions and integrations.

With this enhancement, the “CDS Block Metadata Updates” setting allows customers to choose whether to allow overwrites or to preserve manual changes made to the course metadata when the updates to a course are available from the Course Provider. The default setting enables course updates from your content subscriptions and integrations to flow into your CSX portal.



How Does this Enhancement Benefit My Organization?

Administrators can now choose between either of the two configurations given below:

- Administrators can receive corrections and improvements to course metadata when they receive course updates from content providers or
- Administrators can confidently customize the Title, Description, and Keywords (and any localizations associated with those fields) without fear of their changes being overwritten when course updates are received.
    - This requires customers to opt out and request the setting “CDS Block Metadata Updates” = TRUE

Considerations

- Customers who wish to continue preserving metadata changes they have made on their portal should contact Global Customer Support before November 9, 2023.

- Title, Description, and Keywords are the only metadata fields preserved when the “CDS Block Metadata Updates” setting is enabled. All other metadata fields will be overwritten even with the setting enabled.
- Subjects are never overwritten. Subjects from CDS course updates are appended to the existing Subjects in the portal.
- The setting applies to both Online Courses and Online Content.
- The LinkedIn Learning integration is not affected by this change. This integration uses an older delivery system, not CDS.

Implementation

This functionality is available for all organizations using the Learning module.

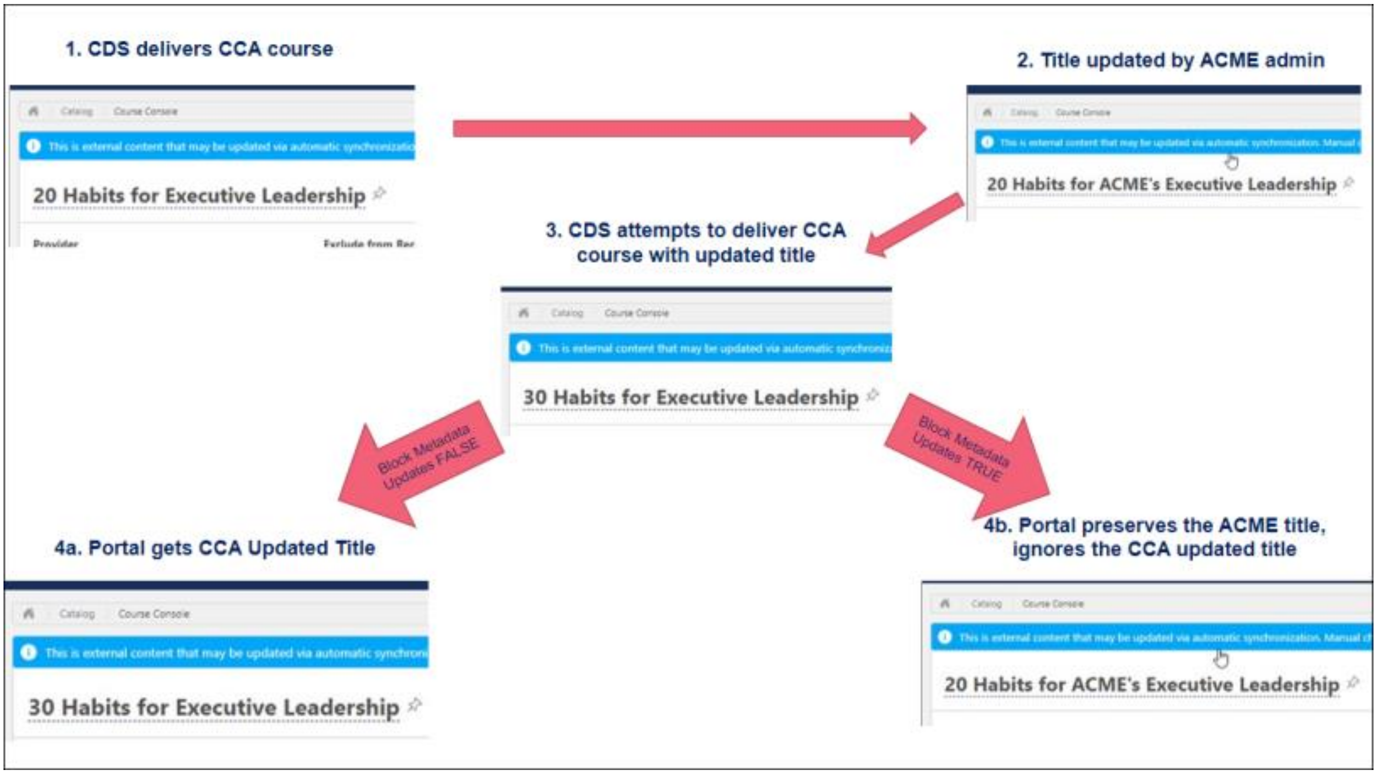
The “CDS Block Metadata Updates” setting will be turned off (= FALSE) by default (allowing the latest Course Metadata to flow to the portal). To enable this functionality, contact Global Customer Support.

Metadata Preservation for Content Subscriptions and Integrations Workflow

When a customer purchases a Content Subscription or Integration, the courses are automatically added to their portal via the Content Delivery System (CDS). These courses are added with rich metadata such as title, description, keywords, etc., pre-populated by the Content Provider and Cornerstone's curation team. Once these courses are delivered to the portal, the administrator can manually update some fields of course metadata.

However, when the Content Provider made metadata updates to their courses, those updates overwrote any metadata changes the customer made manually during subsequent synchronizations with the CDS.

To prevent manual metadata changes from an Administrator from being overwritten by changes provided by Content Providers, we have introduced the “CDS Block Metadata Updates” setting, which allows customers to preserve the course metadata when the Course Provider updates the course.

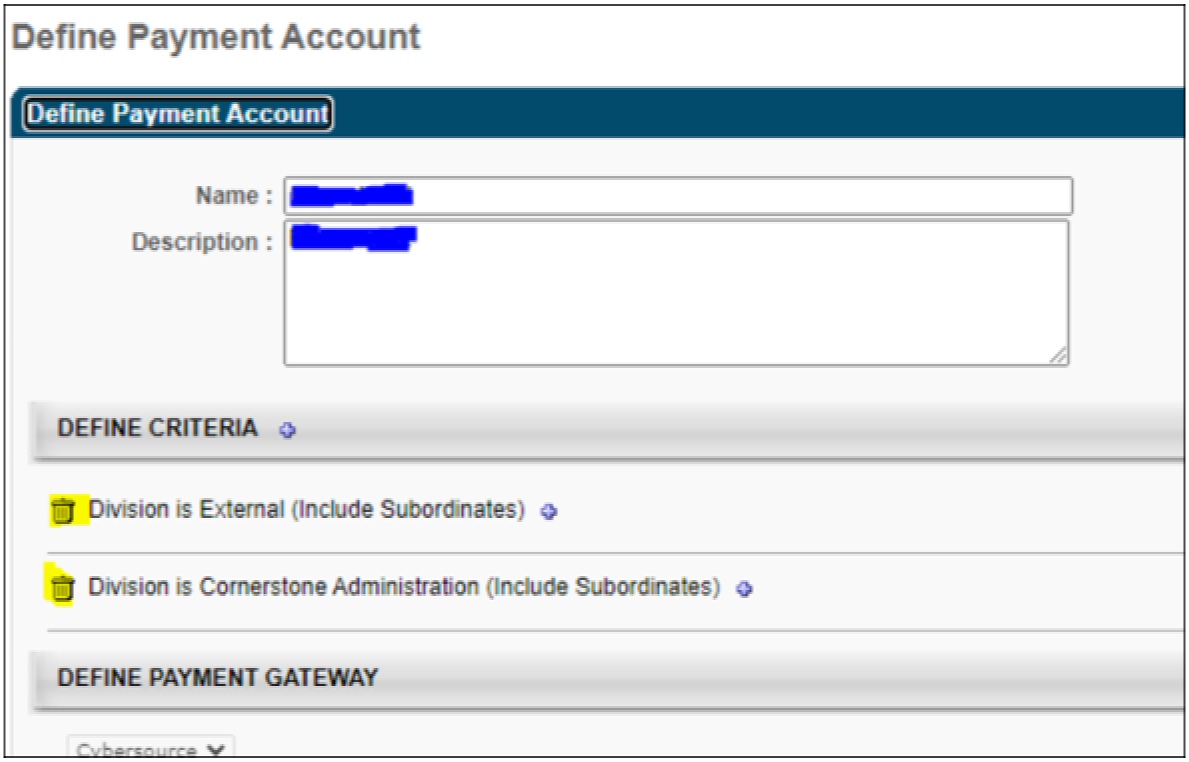


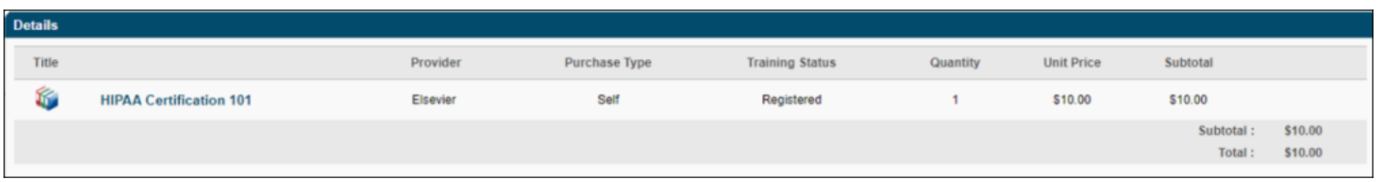
Learning - Extended Enterprise

Curriculum Subscription Enhancements

Prior to this enhancement, the learners were unable to auto-renew curriculum subscriptions due to the availability criteria being attached to the relevant payment account. As a result, they had to select the payment account criteria manually for registration.

With this enhancement, the learners can auto-renew curriculum subscriptions (with or without availability criteria being attached to the payment account configuration), therefore removing manual intervention. The Manage Transaction page is also correctly populated with the renewal transaction details.





Details

Title	Provider	Purchase Type	Training Status	Quantity	Unit Price	Subtotal
HIPAA Certification 101	Elsevier	Self	Registered	1	$10.00	$10.00
					Subtotal :	$10.00
					Total :	$10.00

Considerations

It is recommended not to use Subscription Auto-renewal with Purchase Bill or Invoice or Send Bill payment method.

Frequently Asked Questions (FAQs)

Will Coupons be applied for renewal transactions?

Coupons will be applied only on the initial transaction and not renewals.

Implementation

This functionality is automatically enabled for organizations using recurring curriculum subscriptions on their portals. To enable recurring curriculum subscriptions in your portal, contact Global Customer Support.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Admin - Manage	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. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement. ***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.*	Learning - Administration
Curriculum Admin - View	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. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement. ***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.*	Learning - Administration
Curriculum Owner	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.	Learning - Administration

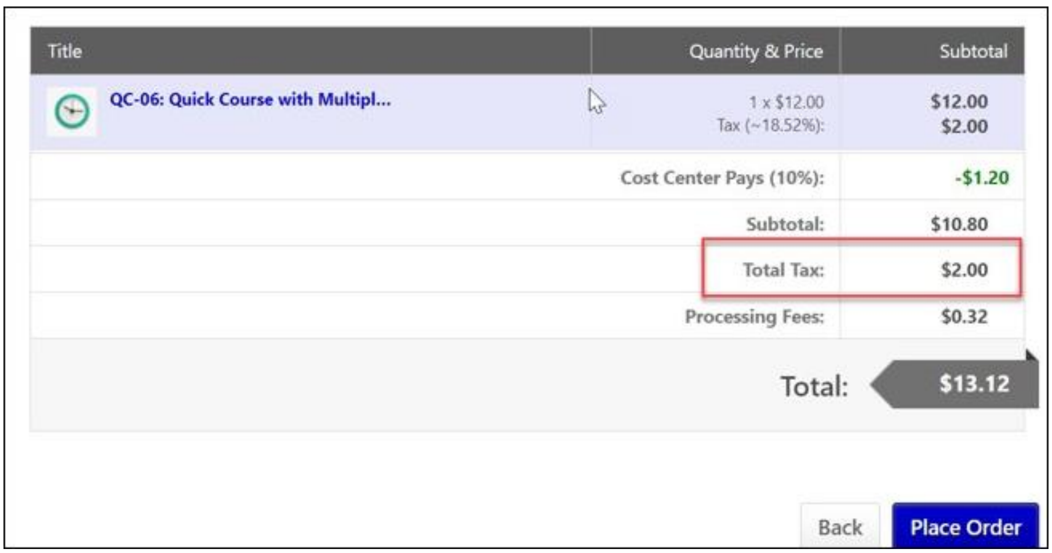
Stripe Payment Gateway - Tax

Prior to this enhancement, the customers had to find other ways of collecting the taxes for transactions made via CSX EXE as the payments processed through Stripe did not include the sales tax amount.

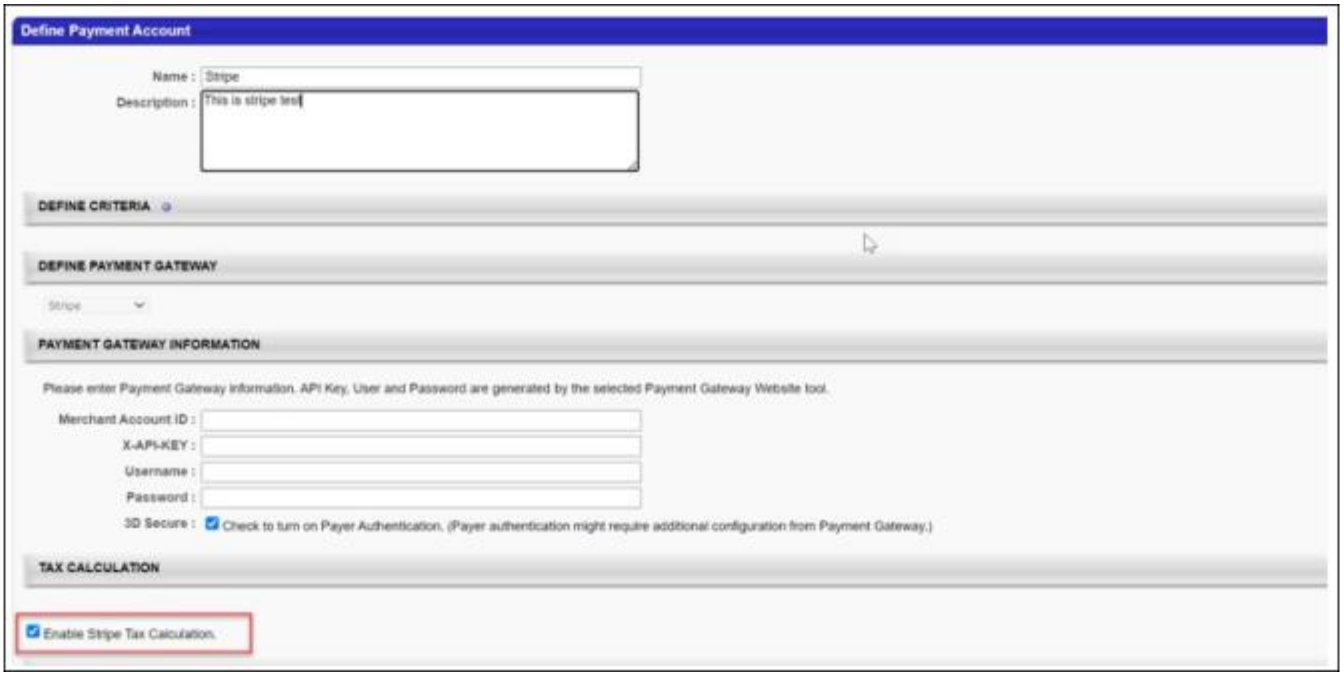
With this enhancement, customers using the Stripe payment gateway can automatically collect tax from their end users during the transaction. Stripe Tax lets you calculate, collect, and report tax on global payments with a single integration. You can easily register with Stripe and access the reports within Stripe to file returns.

Before

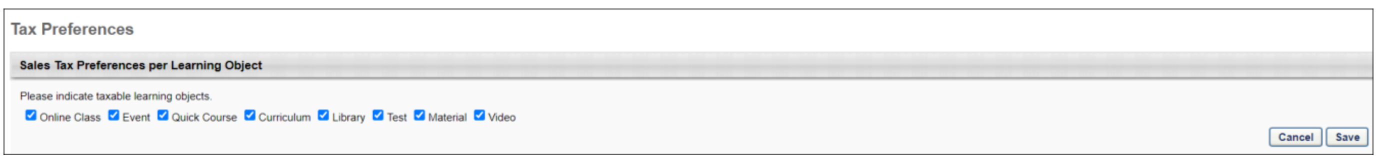
After

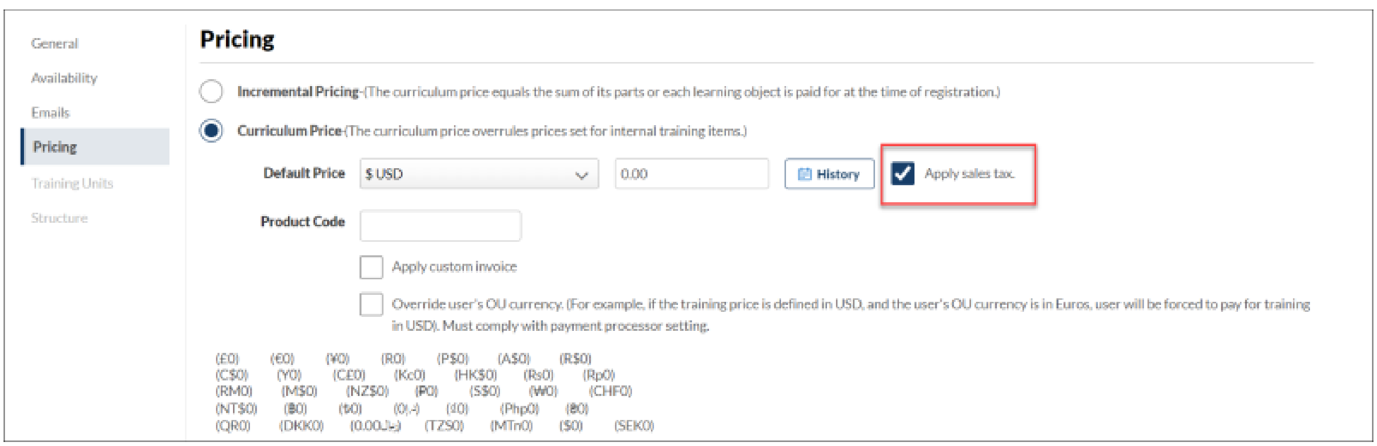


To enable Stripe Tax Calculation, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > E-COMMERCE and click **MODIFY PAYMENT ACCOUNT**. In the Define Payment Account page, select **ENABLE STRIPE TAX CALCULATION** check box.



To select the Learning Objects (LOs) that are eligible for tax calculation, go to ADMIN > TOOLS > LEARNING > E-COMMERCE > TAXES > TAX PREFERENCES and select the LOs. Now go to the pricing section of an eligible LO and select **APPLY SALES TAX** check box.





How Does this Enhancement Benefit My Organization?

- There is no need for a separate tax account with Stripe.
- It is easy to define the specific regions within Stripe for tax calculation.
- It provides a clear visibility of the tax that needs to be paid for a transaction.

Considerations

- Stripe Tax is an enhancement to the existing Stripe Payment Gateway.
- Stripe Tax is not available for other payment gateways.
- Stripe Tax can be calculated based on the billing address only.
- As of now, tax cannot be calculated based on the Secondary address.

Frequently Asked Questions (FAQs)

Can Stripe tax be used for tax calculation when the payment gateway provider is not Stripe?

No. As of now, Stripe tax can only be used when Stripe is the payment processor for the transactions.

Do we need a separate tax account with Stripe payment gateway for tax calculations?

No separate tax account is needed but you must register the regions within your Stripe account to collect taxes.

Can tax be calculated on the basis of secondary address?

Currently, Stripe tax can only be calculated based on the billing address entered during the checkout or the primary address along with the saved card details.

If a given LO does not have the pricing tab, can tax be calculated for that particular LO?

No. Apply sales tax checkbox under the pricing tab of a given LO should be checked for Tax calculation. If the pricing tab is unavailable, tax cannot be calculated for that LO.

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
Payment Account - Modify	Grants ability to create payment profiles to determine the routing of users' payments. This permission cannot be constrained. This is an administrator permission.	eCommerce - Administration

Learning - Integrations & APIs

Deprecation of Learning on Workplace by Facebook Integration

The Learning on Workplace by Facebook integration is being deprecated in the November ‘23 release and the “Learning on Workplace by Facebook Integration” tile will not be displayed in Edge Marketplace. Customers who installed the integration in their CSX portals will no longer see it in Integration Center. No action is required from customers.

Transcript API (Early Adopter)

The Transcript API is a bundle of APIs providing access to the learner's transcript. The APIs follow the same business logic, security, rules, and events from the portal’s configuration.

The Transcript APIs were scheduled to be delivered in various milestones (from Open Beta or Early Adopter to General Availability), allowing our customers and partners to get involved early and provide feedback as needed.

The Transcript API Milestone 1 features were first made available to customers as an Open Beta only in stage portals in the July ’23 Release. The Transcript API Milestone 2 is available as an Early Adopter to customers with the November ’23 Release.

Transcript API Milestone 1

All the following Transcript API Milestone 1 features are now available in Early Adopter mode:

- Data APIs (GET): Overview API, Detailed APIs, filters, multi-language support
- Request API: Request training, Employee perspective
- Assign API: Assign training, Manager and Learning Administrator perspective
- Remove API: Remove training, bi-directional

Transcript API Milestone 2

With this release, the Transcript API Milestone 2 supports the following features:

- Register API: Register a training, Change an “Approved” learning record to “Registered"
- Progress API: Change a “Registered” learning record to “In Progress"
- Complete API: Complete a learning record
- Update API: Update transcript data, Custom Fields, Form Fields, Due date

Developer Portal

The web services URLs and scopes from Milestone 1 have changed. For full documentation about the API, please see the Developer Portal: **https://csod.dev**

Transcript API (Open Beta) Community

The Transcript API (Open Beta) Community in the Success Center provides the following:

- API overview
- Milestone plan
- Question forum
- Feedback forum

Link to community: **Transcript API (Open Beta) community**

Navigation path: CORNERSTONE SUCCESS CENTER > ALL COMMUNITIES > CORNERSTONE BETA COMMUNITY > TOPICS > LEARNING > TRANSCRIPT API (OPEN BETA)

Implementation

All the Transcript APIs can be enabled and tested in all portal environments (production, pilot, stage). Review the API documentation for new permissions, constraints and scopes.

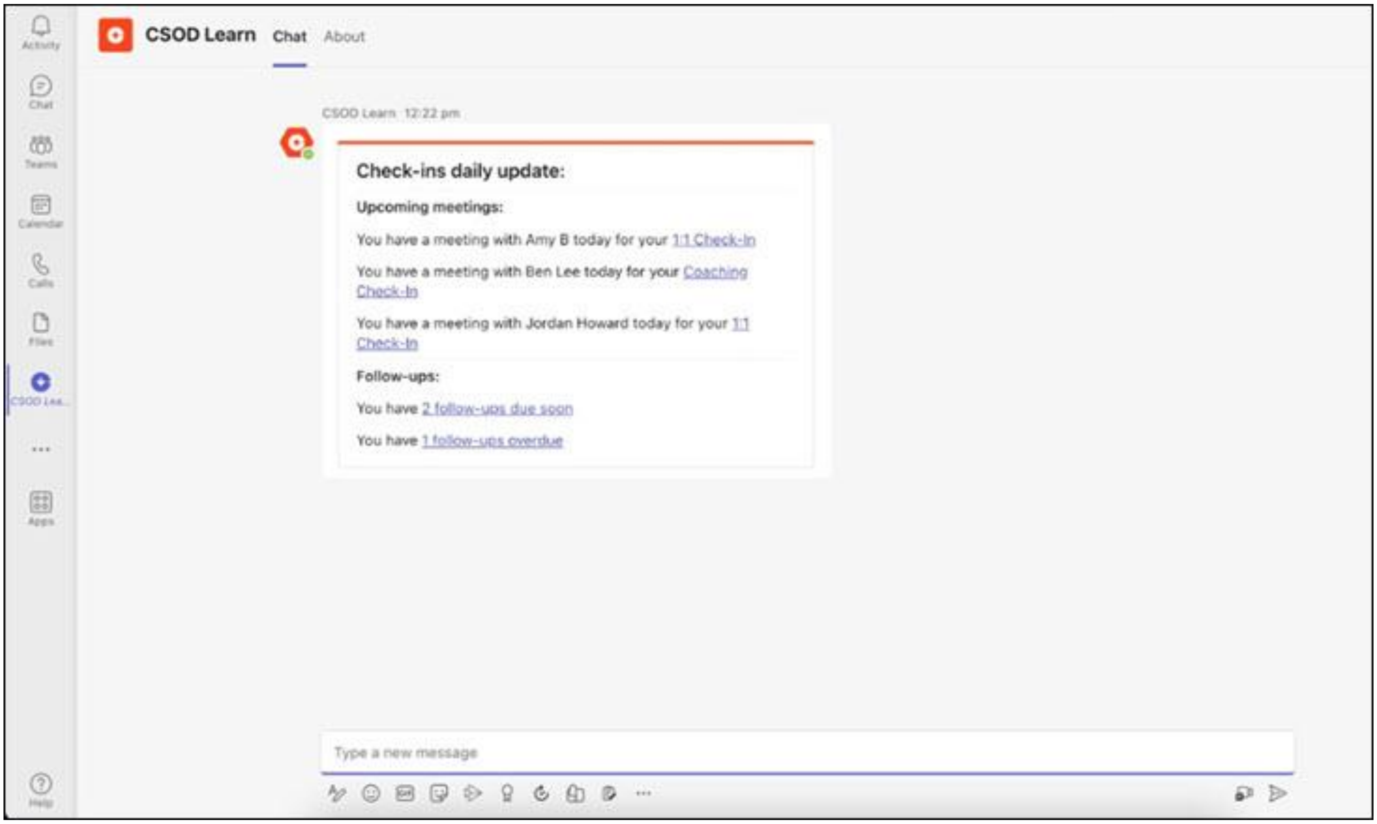
Performance

Check-Ins

Check-Ins Microsoft Teams Integration

With this release, Check-Ins is integrated with MS Teams. Now, users can receive Check-In meetings and Follow-Ups notifications on the MS Teams chat page and click a link to take action, even if not actively logged into Check-Ins.

Users will receive a daily, automated update that includes information about their scheduled meetings for the day and any overdue or upcoming follow-ups. If a user has no notifications for the day, they will not receive an update.



Enable the MS Teams Integration

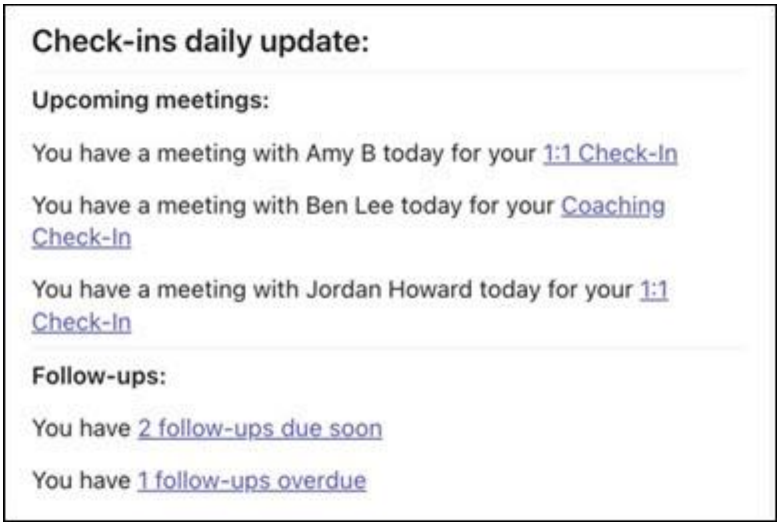
The CSOD Learn app must be added in MS Teams to use this functionality.

To enable the MS Teams integration:

1. Open MS Teams.
2. In the left column, select the Apps icon.
3. Locate the CSOD Learn option and click **ADD**, then click **ADD** again on the CSOD Learn page.

Note: If you do not see the CSOD Learn app in MS Teams, contact your IT department and ask them to allow this app.

Notifications



- Upcoming meetings - Both participants in the meeting receive a notification the morning of the meeting. If the user has more than one meetings on a specific day, the participants' names are listed in alphabetical order. Clicking the meeting name opens the Check-In meeting.
- Follow-Ups - The participant assigned the follow-up is notified of the total number of follow-ups due in the next seven days. Users are also notified of past due follow-ups. If the follow-up is unassigned, both participants in the Check-In series receives a notification. Clicking on the follow-up opens the Follow-Up flyout where users can view their information. If a follow-up is unassigned, both participants in the series receive a notification. **Note:** Check-Ins Insights must be enabled to view the follow-ups flyout. If Check-Ins Insights is not enabled, clicking on the follow-ups link will redirect the user to the homepage. *See Check-Ins Insights Page.*

Considerations

Users receive Check-Ins notifications along with existing learning notifications if they have active Check-Ins. This cannot be turned off.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users with constraints in the “Check-Ins -	Performance

	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. This is an end user permission. **Note:** *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.*	

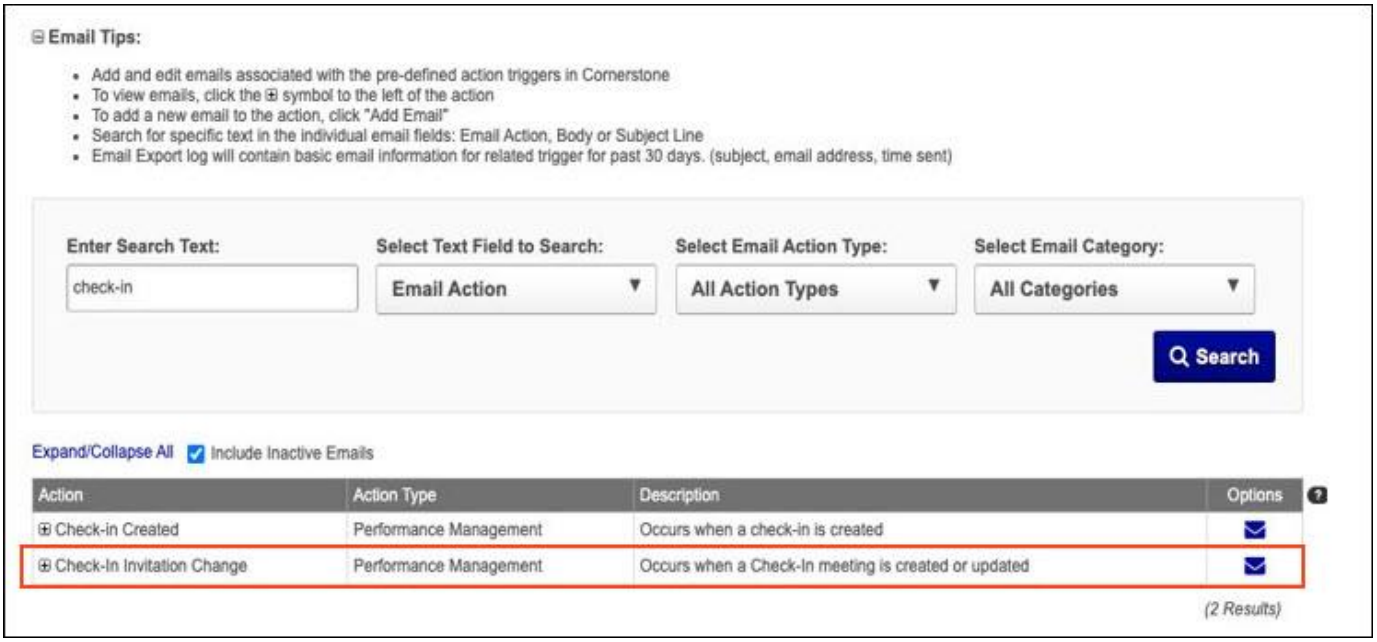
Check-Ins Calendar Invites

Prior to this enhancement, when Check-In users created a series of meetings, they had to manually create matching meeting invites on their external Outlook calendar. This means that users have to manage meetings in two different systems.

With this enhancement, a user's Outlook calendar is integrated with Check-Ins meetings. Users can create a Check-Ins meeting(s) and send an invite to the Outlook calendar of both participants. Users can then easily access their Check-In meetings from their Outlook calendar, and participants in the meeting series can edit the meeting schedule and calendar invite..

An administrator must configure the Outlook calendar invite to use these features.

Enable the Outlook Calendar Invite



To enable the Outlook Calendar Invite feature, go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT. Complete the following fields:

- **Enter Search Text** - Type "check-in"
- **Select Text Field to Search** - Select "Email Action"
- **Select Email Action Type** - Select "All Action Types"
- **Select Email Category** - Select "All Categories"

New Fields for Creating a Check-Ins Meeting Series


Create a new check-in
Add meeting schedule
First Meeting Start Time
M/D/Y
12:00 PM
First Meeting End Time
M/D/Y
12:30 PM
Meeting Time Zone
(UTC-08:00) Pacific Time (US & Canada)
Meeting Location
e.g., link to a call or the name of your meeting room
Meeting Frequency
Every
Weekly
1
Week(s)
S M T W T F S
End
No End
Email Invite
Send a calendar invite to all participants. Invites will be automatically updated if meetings are amended or cancelled.
Previous
Continue

The following new fields allow users to complete and send an Outlook calendar invite to participants when creating a new Check-Ins meeting series or for an existing series:

- **Meeting Frequency** fields: Select weekly or monthly recurrence options.
- **End** field: Select to end the meeting series on a specific date. Options are **On** to end on a specific date, **No End** to continue indefinitely, or **After** to end after a specific number of occurrences.
- **First Meeting Start Time** and **First Meeting End Time**: Select meeting times for recurring meetings. These fields must be completed to automatically send or download an Outlook calendar invite.
- **Meeting Time Zone** - The default time zone for this meeting. This is a required field.
- **Meeting Location** field: Select a location for the meeting series. Add a link to a MSTeams or Zoom call or the name of the meeting room.
- **Email Invite**: Check to send an Outlook calendar invite to both participant in the Check-Ins meeting series. The meeting invite is updated if there are changes to the meeting series. Email invites can be sent on desktop or mobile.

If these fields are completed, users can also edit the Check-In name and description before confirming the Check-In meeting. Once the meeting is confirmed, the invite is automatically sent to the Outlook calendar for both participants.

To create or edit a new Check-In meeting series, go to CHECK-INS HOME PAGE > CREATE A NEW CHECK-IN MEETING or open an existing meeting series.

Edit Check-Ins Meetings

Participants can edit the meeting schedule for a series and individual meetings.

Edit the Series

To edit, go to PERFORMANCE > CHECK-INS and click the appropriate check-in series on your home page. Click the ellipses, select **Check-Ins Settings**, and then select the Manage Meeting Schedule tab.

Any changes made on the Manage Meeting Schedule tab will automatically update the future Check-Ins meetings and Outlook calendar invite.

The Check-Ins **Modification History** tab provides details of any changes made to the selected meeting series.

Edit an Individual Meeting

To edit an individual meeting, open a meeting and select the date at the top of the page. On the fly-out, make the necessary changes. The participant calendars will reflect the new changes. Changes to individual meetings do not impact the Check-In series.

Delete a Check-Ins Meeting

If a meeting is deleted from the Outlook calendar, it is not reflected in CSX Check-Ins.

Send Outlook Calendar Invites

The Outlook invite includes the following information:

- **Meeting Name:** The Check-Ins series name.
- **Organiser:** This is always "CSX".
- **Attendees:** The participants in the meeting series.
- Time:
    - **Start time:** The meeting start time.

    - **End time:** The meeting end time.
- **Date:** The meeting date.
- **Location**, if specified: The location information.
- Invite Body: Configured by the administrator.

Outlook calendar invites can be sent automatically or by downloading/importing:

Automatically

Complete the associated fields and click the **Email Invite** box when creating or editing a Check-Ins meeting series.

- Administrators must create an email for the "Check-In Calendar Invitation Change" to allow invitations to be sent.
- Users must have their correct email addresses stored in the system to receive emails.
- The default email is noreply@csod.com.

Downloading and Importing:

In Meeting View, open the appropriate meeting series and select the appropriate meeting start and end time. Select the vertical ellipsis and select **Download Calendar Invite (Series)** or **Download Calendar Invite (Occurrence)**. The meeting is downloaded to the participant's Outlook calendar. Downloading allows users to receive Outlook calendar invites even if the email invite functionality is not configured on their system. Once the ICS file downloads to a browser, the user can drag the invite into their Outlook calendar and import the invite information into Outlook.

Considerations

- Any changes must be made in CSX Check-Ins. If a user make changes in Outlook or deletes a Check-Ins meeting in Outlook, those changes are not updated in CSX Check-Ins.
- If a user makes changes through CSX Check-Ins and selects “Send email invite”, all meetings in the Outlook calendar series are updated to reflect the changes. If a user makes changes through CSX, past meetings in Check-Ins will not be updated.
- If a user adds a new meeting to the CSX Check-Ins series after sending the invites, and it is not part of the recurrence, this meeting is not reflected in the participants Outlook calendar.

Implementation

- Administrators must **enable this feature**. Go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT and check the **Check-In Invitation Change** box.
- The downloading invites functionality is off by default. To enable it, go to ADMIN > PERFORMANCE MANAGEMENT > CHECK-INS > CHECK-INS SETTINGS. Enable the **Check-Ins Calendar Invite Download** option.
- To use the email invite functionality, an administrator must activate and configure the Check-In Calendar Invitation Change email trigger.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users with constraints in the “Check-Ins - Create” permission cannot create a new Check-In with anyone who is not part of the constraints, but can still view and update any Check-In in which they are a participant. This is an end user permission. **Note:** *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.*	Performance

Email - Edit From Address	Grants ability to edit the "from" address when creating or modifying an email trigger. In addition, the **Allow user to change email address** option must be selected in Email Preferences. This permission works in conjunction with the Global Email Administration - Manage permission. This is an administrator permission.	Core Administration

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

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

Check-Ins Slack Integration

With this release, Check-Ins is integrated with Slack. Now, users can receive Check-In meetings and Follow-Ups notifications on Slack and click a link to take action, even if not actively logged into Check-Ins.

Users will receive a daily, automated notification that includes information about their scheduled meetings for the day and any overdue or upcoming follow-ups. If a user has no notifications for the day, they will not receive an update.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users with constraints in the “Check-Ins - Create” permission cannot create a new Check-In with anyone who is not part of the constraints, but can still view and update any Check-In in which they are a participant. This is an end user permission. **Note:** *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.*	Performance

Enable Slack Integration

Administrators can access the **Slack Learning in the Flow** integration in the Edge Marketplace.

See the Slack Learning in the Flow Edge Integration Guide.

Notifications

The Slack integration provides the following notifications:

- Upcoming meetings - Both participants will receive a notification the morning of the meeting. If the user has multiple 1:1s in a day, the participants’ names will be listed in alphabetical order. Clicking the meeting name opens the Check-In meeting.
- Follow-Ups
  - Due Soon - The participant assigned the follow-up is notified of the total number of follow-ups due in the next seven days. Users are also notified of past due follow-ups. If the follow-up is unassigned, both participants in the Check-In series receives a notification. Clicking on the follow-up opens the Follow-Up flyout where users can view their information.

- Overdue - The participant assigned the overdue follow-up will receive the notification. If the follow-up is unassigned, both participants in the check-in series will receive a notification.

Note: Check-Ins Insights must be enabled to view the follow-ups flyout. If Check-Ins Insights is not enabled, clicking on the follow-ups link will redirect the user to the homepage. *See Check-Ins Insights Page.*

Considerations

Users receive Check-Ins notifications along with existing learning notifications if they have active Check-Ins. This cannot be turned off.

Implementation

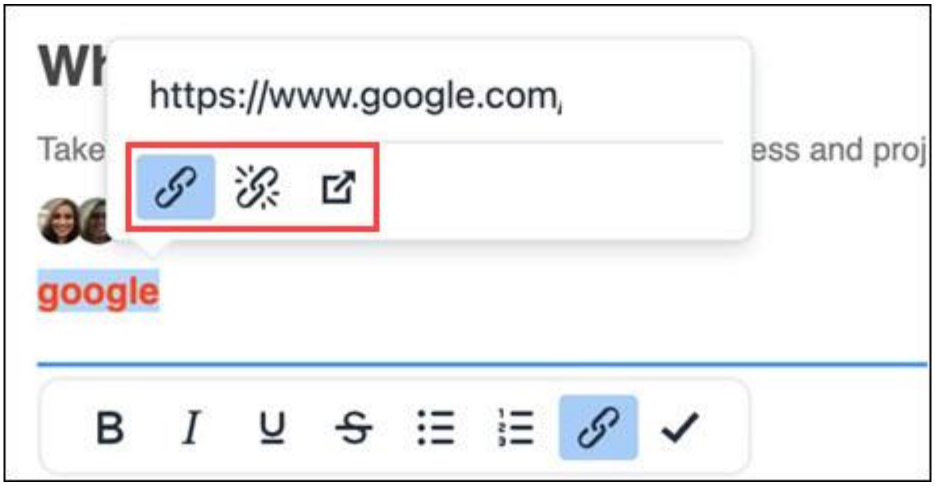
This functionality is automatically enabled for all organizations using the Performance Check-Ins module.

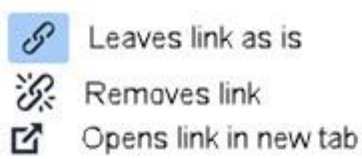
Check-Ins Usability Enhancements

With this enhancement, the hyperlink functionality is simplified and redundant buttons removed to improve the Check-Ins user experience.

Hyperlink Functionality Simplified

With this release, on the meetings and topics page, when users click on a link in the comments section, three new options appear.



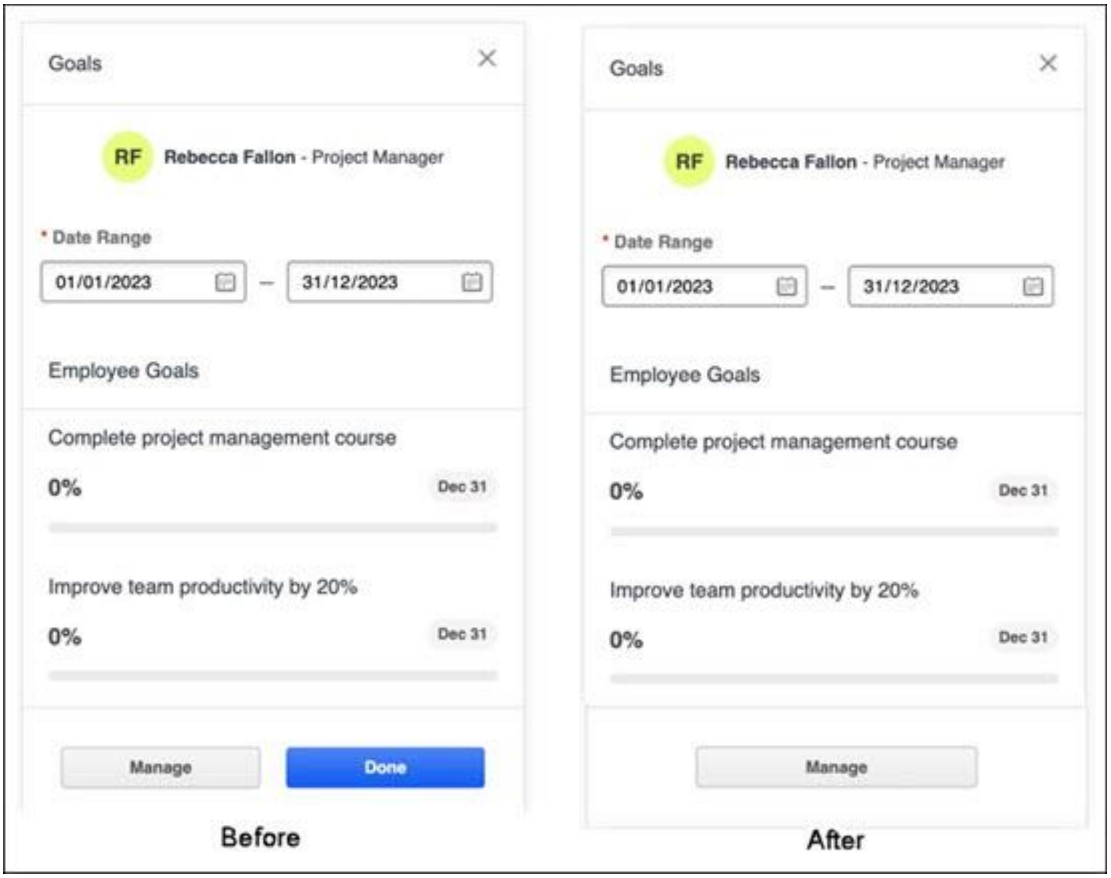


Redundant Buttons Removed

With this release, unnecessary buttons are removed from the Check-Ins Goals, Development Plan, Follow-Ups, Skills, and Personal Notes panels. Users can use the default "x" in the upper right corner to close these panels.

Goals

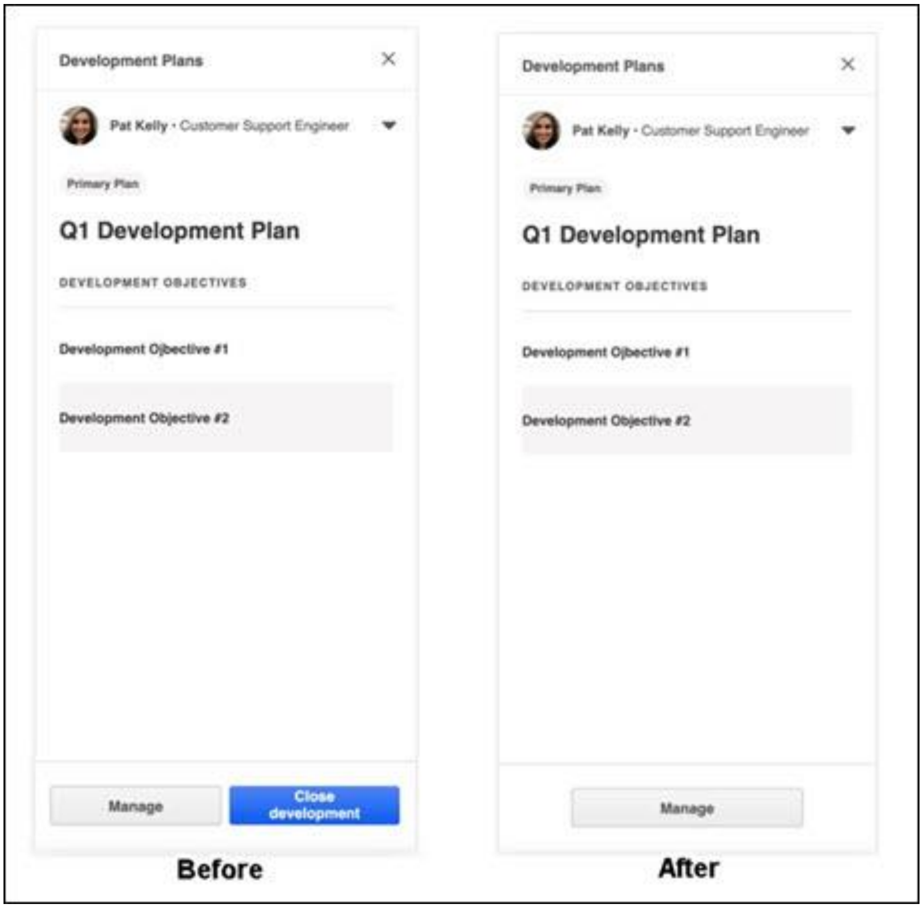
The **DONE** button is removed.



Note: *The Goals Panel applies the same rules that the 'View Goals' permission allows for goals.*

Development Plans

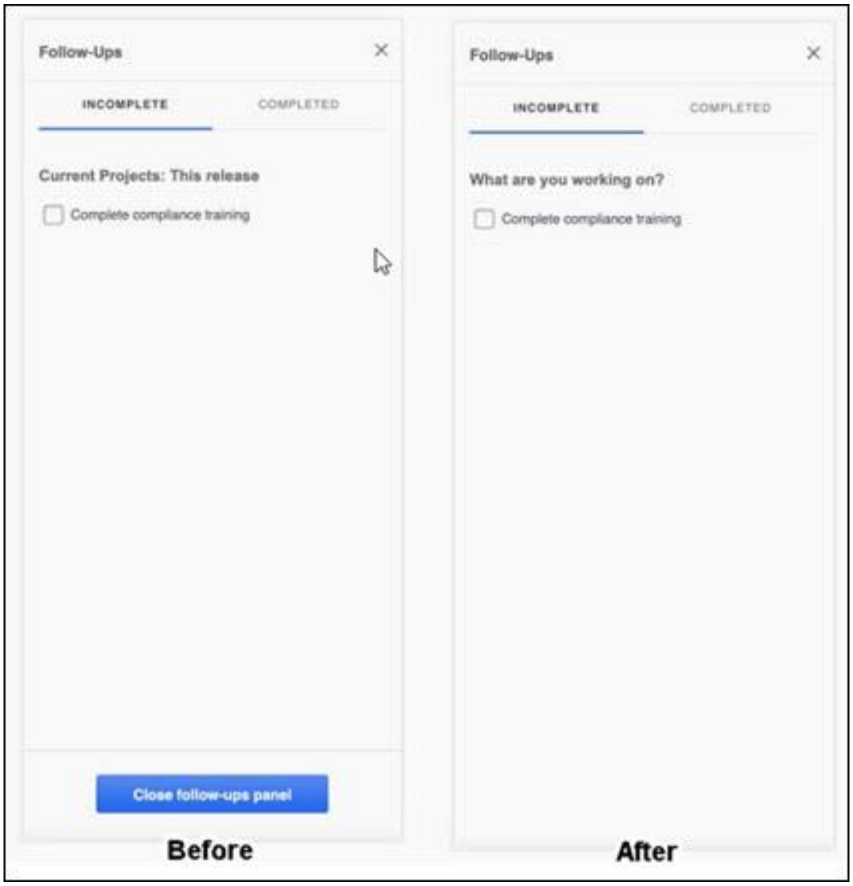
The **CLOSE DEVELOPMENT** button is removed.



Note: *The Dev Plan panel applies the same rules that the "Snapshot - Development Plans" permission allows for development plans.*

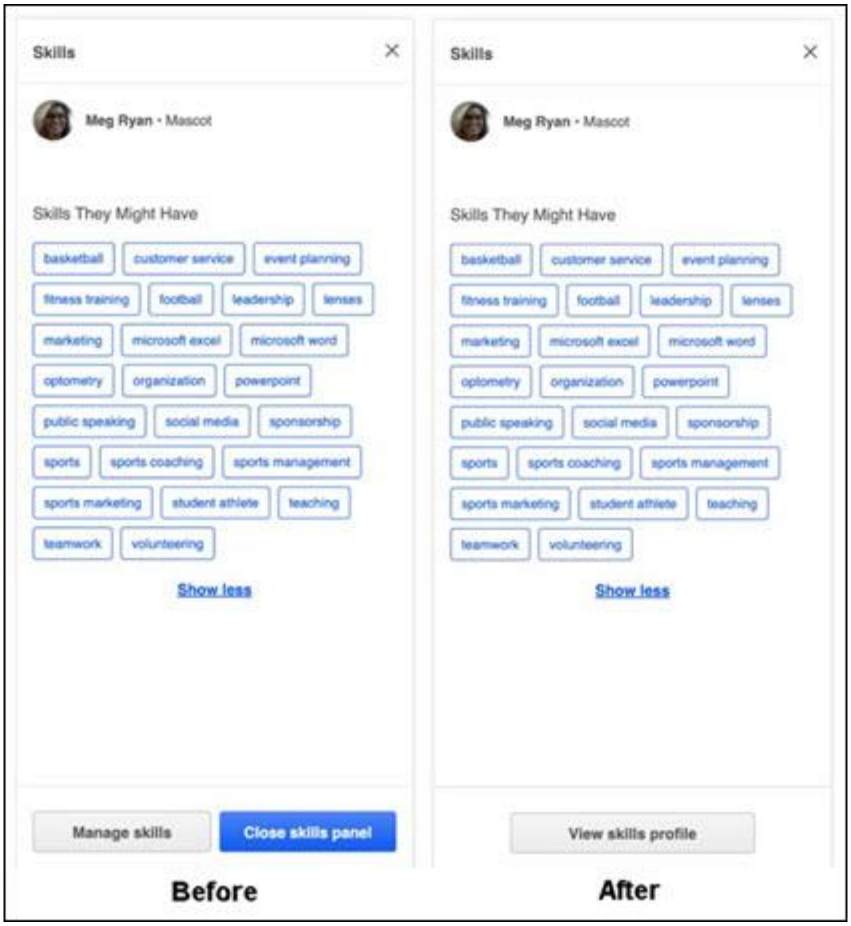
Follow-Ups

The **CLOSE FOLLOW-UPS PANEL** button is removed.



Skills

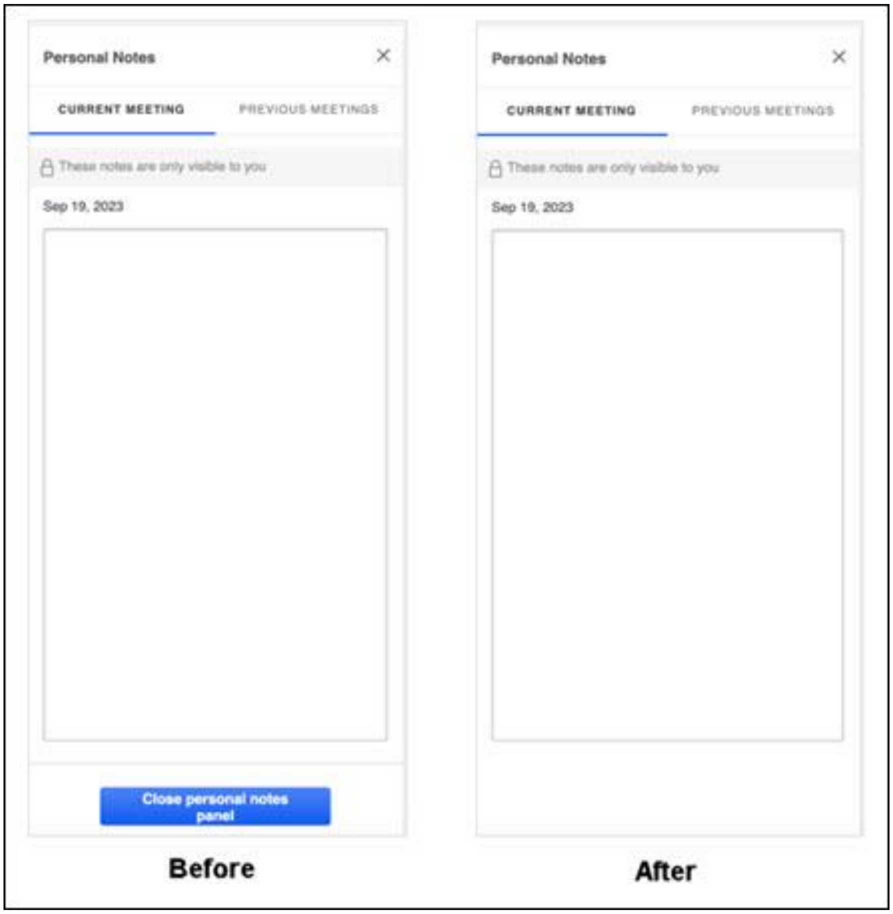
The **CLOSE SKILLS PANEL** button is removed.



Note: *The Skills panel applies the same rules that the "Capabilities - Skills Profile - View" permission allows for the Skills Profile.*

Personal Notes

The **CLOSE PERSONAL NOTES PANEL** button is removed.



Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users with constraints in the “Check-Ins - Create” permission cannot create a new Check-In with anyone who is not part of the constraints, but can still view and update any Check-In in which they are a participant.	Performance

	This is an end user permission. **Note:** *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.*		

Check-Ins View Permission

With this enhancement, a new option, **Check-Ins View Permission**allows users to share Check-Ins with other colleagues. Managers and coaches now have more visibility to provide feedback and meeting participants can share their Check-Ins series with managers or coaches to ensure visibility.

Once enabled, the following new features are available:

- New Check-Ins settings page - Allows administrators to enable Check-Ins sharing.
- Share Check-Ins - Allows users to share Check-In series with other active users, and includes a new Share With Me tab for users to view these shared meetings.
- View Archived - Allows users to view details of archived Check-Ins.

New Check-Ins Settings Page

To use this new functionality, an administrator must enable it on the new Check-Ins Settings page. To access, go to ADMIN > PERFORMANCE MANAGEMENT > CHECK-INS SETTINGS. Enable the **Check-Ins View Permission** option. Once enabled, the user page will display with the new features.

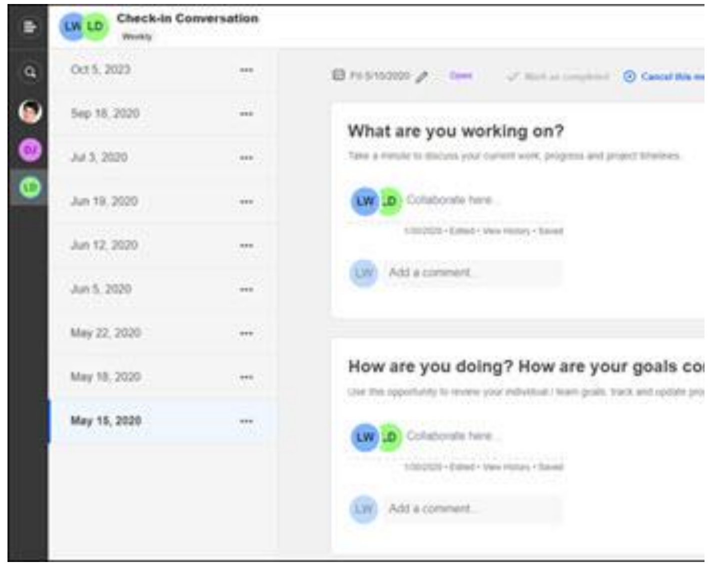
Share Check-Ins

Once enabled, an active participant of the Check-In can share the Check-In with an unlimited number of users in the organization.

Access the Share functionality as follows:

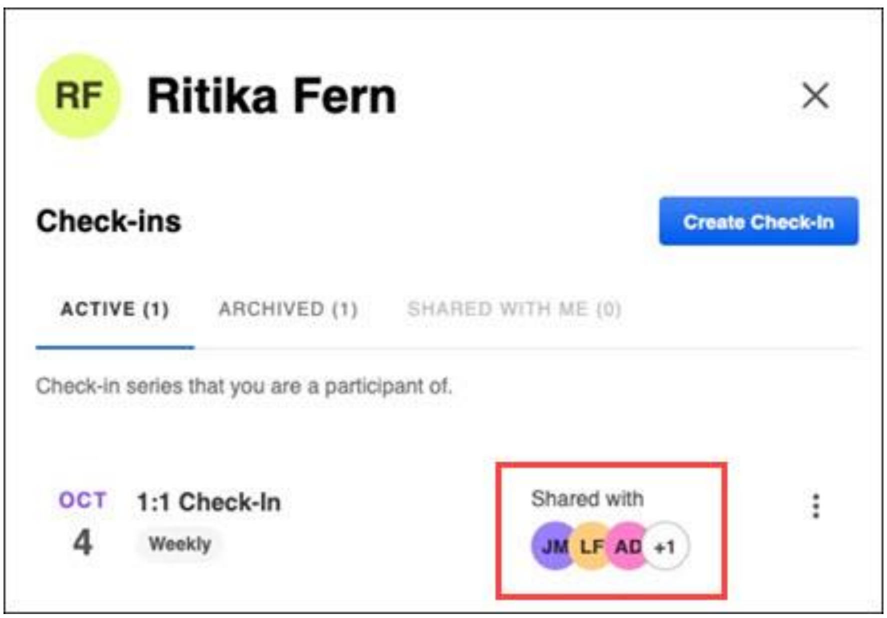
- **From a user profile: From the People Sidebar, select a user with whom you share an active Check-In. Click the Active tab. Click the action menu, and click Share.**

- **From a Check-In Series: Go to the Check-Ins home page and select a meeting that is part of a series. From the options menu, click Share check-in.**

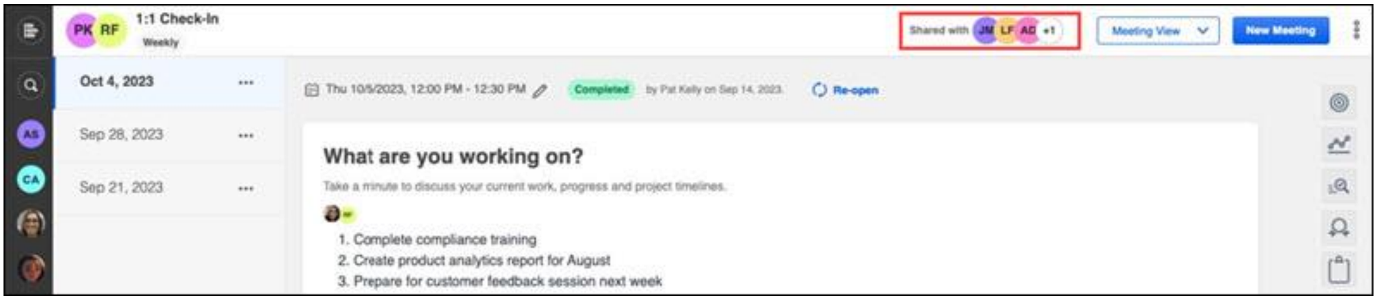


In the **Add people to share this check-in with** box, start typing a name and select one or more names from the name suggestions. Click **SHARE**. The selected people now have read-only access to all meetings in the selected Check-In series. Selected users must be active users. **Note:** Searching and adding users is based on the constraints applied on Check-Ins - Create permission.

Once the Check-In is shared, a **Shared with** section appears on the Active tab. Hover over each icon to view the user names.



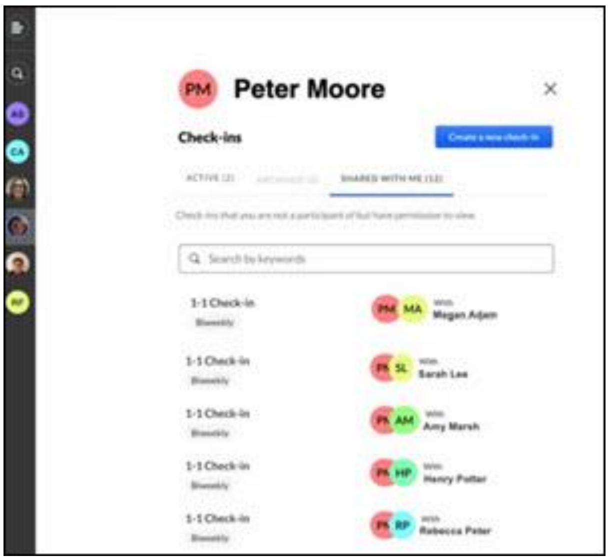
Additionally, a **Shared with** section now appears on the header of a Check-In series.



Note: Users on mobile devices can also share a Check-In series on the Active tab and from a Check-Ins meeting series.

New Shared With Me Tab

The new **Shared with Me** tab lists all of the read-only meetings shared with a user. Check-Ins are listed with most recent at the top. Click a Check-In series to view the shared meetings.



Non-participant Shared Users

Users with shared access who are not participants of the series have read-only access and have limited access to options. These users can view all meetings in the series, view all comments, switch between meeting and topic view and view follow-ups.

Read-only users cannot:

- Add or edit comments
- Add or edit follow-ups
- Add a new meeting
- Download an .ics file
- View personal notes
- Update a Check-Ins status
- Change the meeting date
- Delete a meeting
- Archive a meeting series
- View the skills panel

Remove a Shared User

To remove the read-only permission from a user, on the Share page, click the x next to the appropriate user name. The selected user is no longer able to access the Check-In series. Any series participant can remove a user, even if they did not add them.

View Archived Check-Ins

With this release, users can view an archived Check-In without restoring it. To view an archived check-in, from the meetings and topics page, from the People Sidebar, click a participant's name. Click the **Archived** tab and select the meeting you want to view. To make any changes to an archived check-in, it must be restored. An archived check-in cannot be shared.

Considerations

Add any considerations or exceptions here, if available.

Implementation

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Settings - Manage	Grants ability for the user to update global settings relating to Check-Ins. The permission constraints determine whom can modify the global Check-In settings. 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. This is an administrator permission.	Performance

Goals

Delegation of Goal Permissions

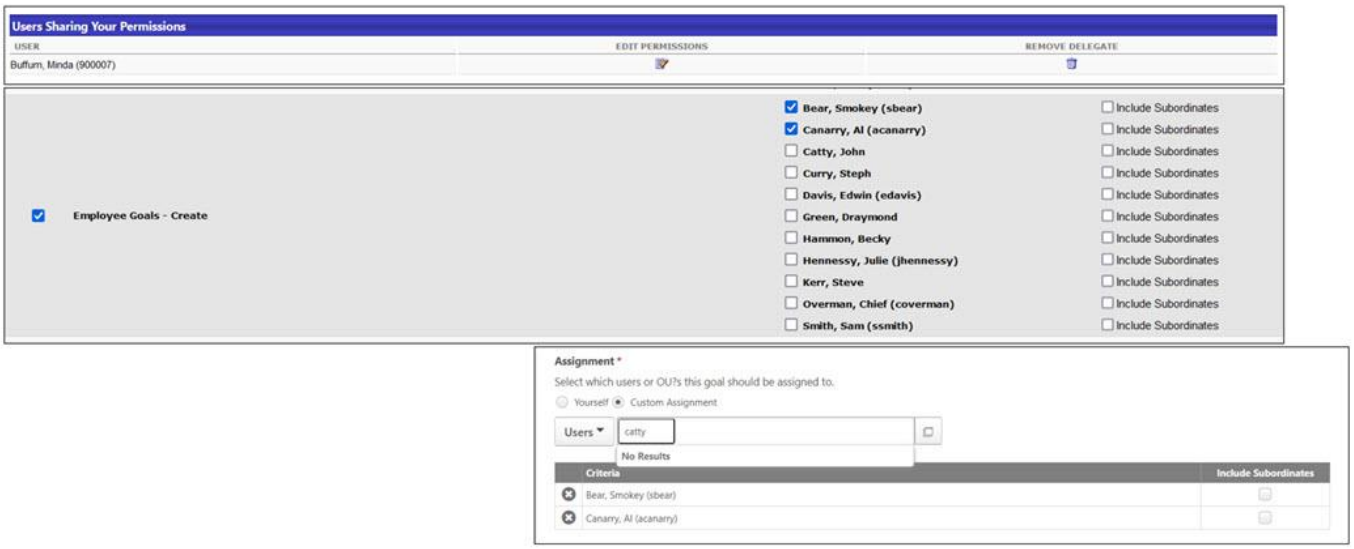
Prior to this enhancement, when managers were out of the office, they were unable to delegate goal creation and view-only permissions to another staff member.

With this enhancement, managers can assign the following existing goal permissions to select subordinates when they are away from the office for an extended period:

- Snapshot Goals - View Goals
- Employee Goals - Create

The Share Permissions page can be accessed from the following pages:

- My Account - Select the Settings icon in the upper-right corner of the screen, and select the My Account link. Then, from the Options drop-down menu, select Share Permissions.
- My Team - From the My Team page, place the computer cursor over the black arrow of your ID card on the left. From the list of options that appears to the right, select Share Permissions.



For more information, *see Share Permissions.*

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
Employee Goals - Create	Allow user to Create Goals for other employees (other than self and subordinates). The constraints on this permission determine with which employees a user can align their goals. This permission can be constrained by OU, User's	Performance - Administration

	OU, Employee Relationships, and User. This is an administrator permission. Note: If this permission is constrained by Employee Relationships, assigned co-planners can create, view, and approve goals.	

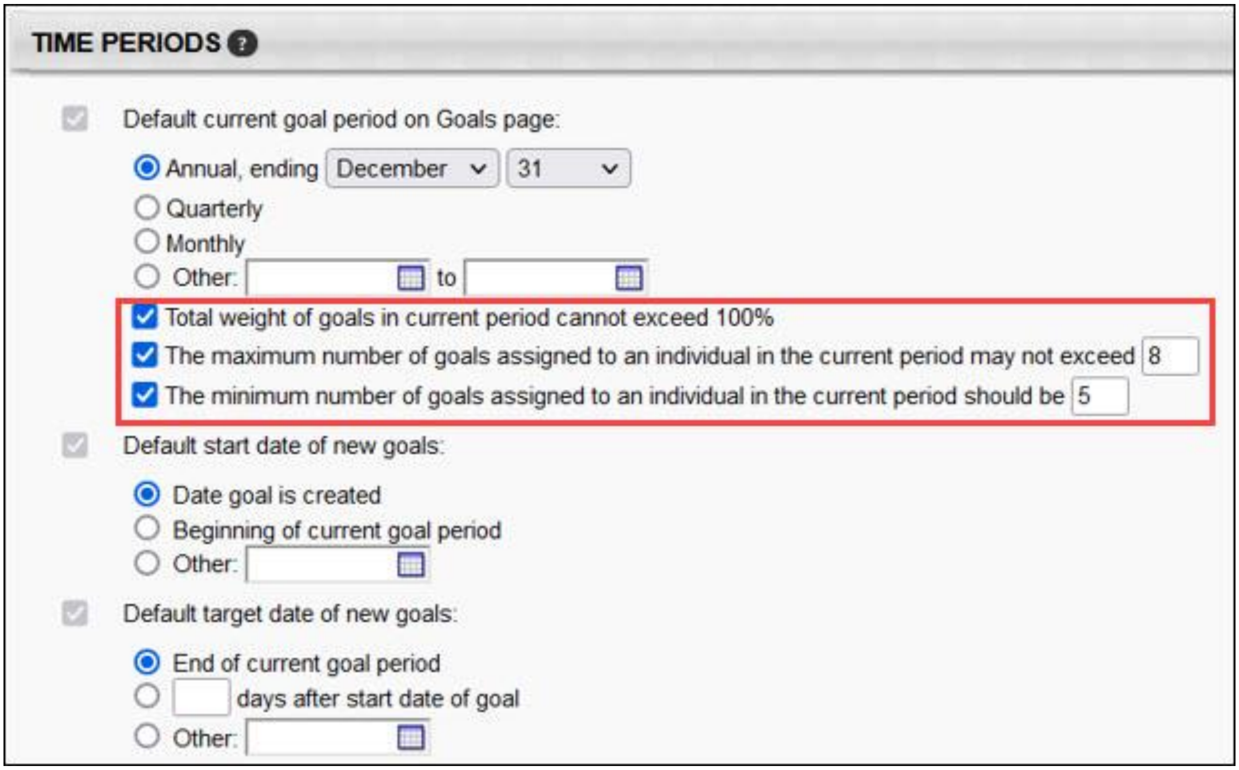
Snapshot Goals - View	Enables user to view their own goals, and others' public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.* **Note:** Managers can assign this permission to select subordinates when they are away from the office for an extended period.	Universal Profile

Enforce Goal Policies

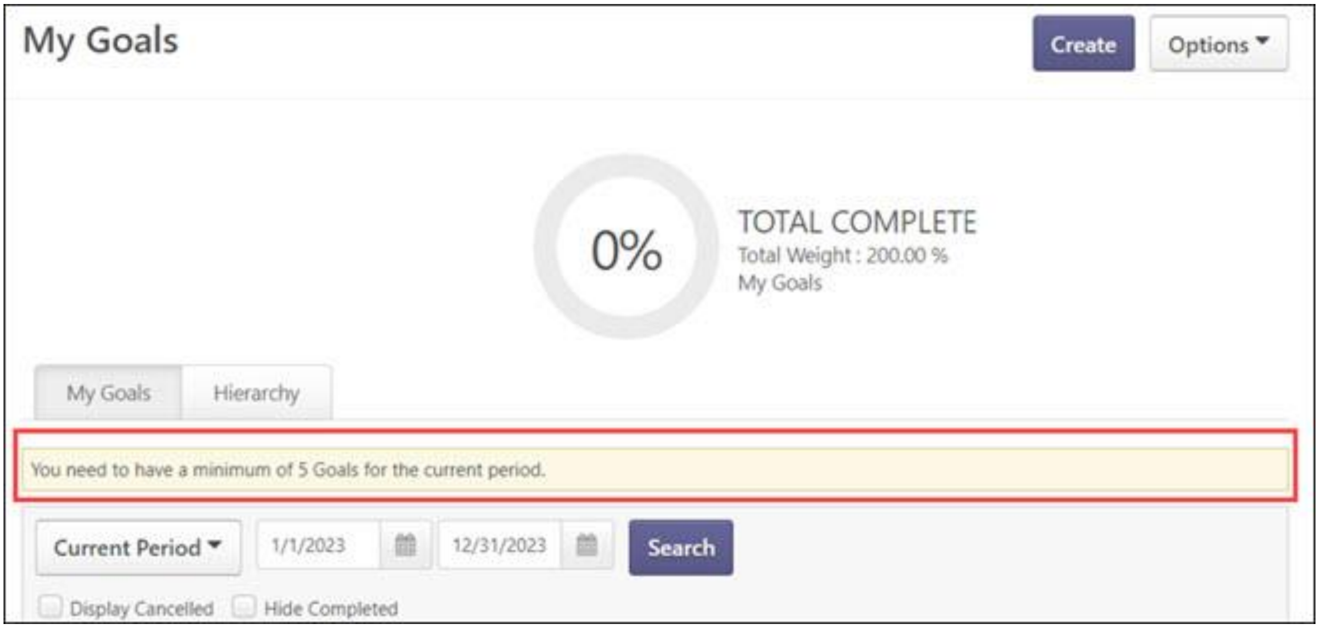
Prior to this enhancement, when creating goals, users did not know the minimum number of required goals in a review period.

With this enhancement, administrators can configure, a minimum and maximum number of required goals for a Division, and a total weight limit for goals.

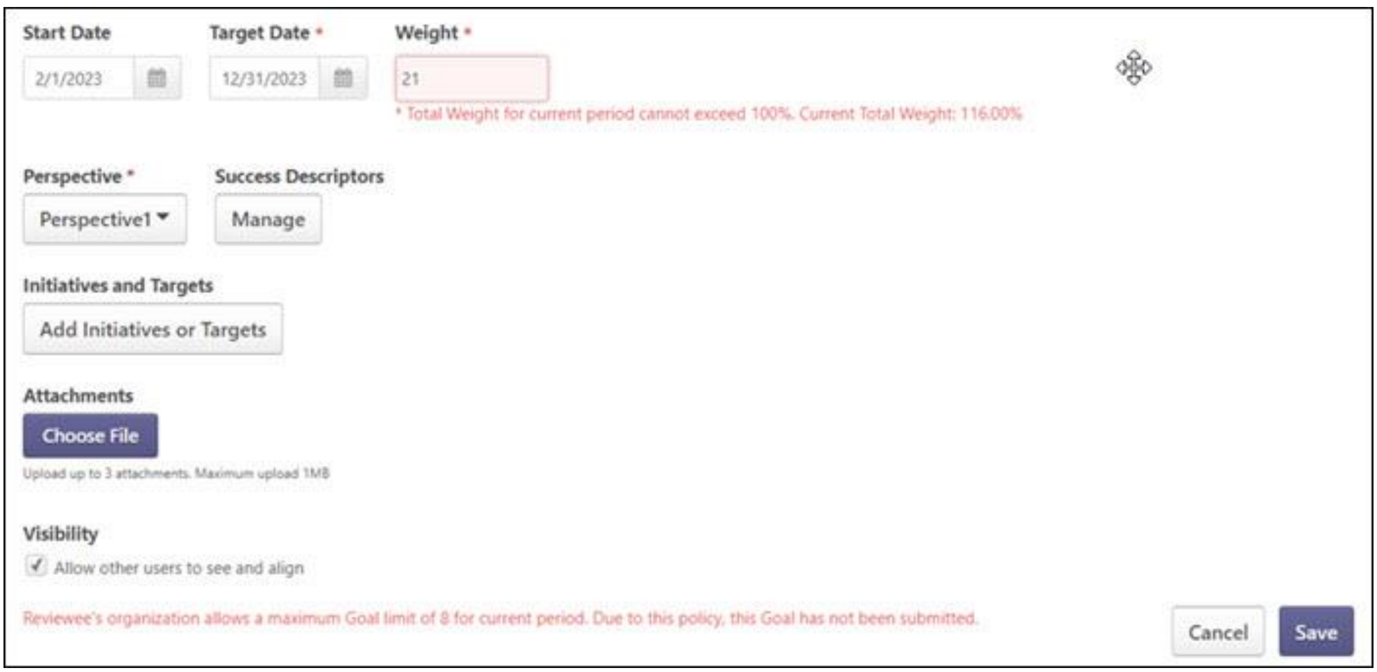
The system now displays the message on My Goals page for the minimum number of required goals. Additionally, the system now enforces the maximum number of goals limit and total weight limit via Review tasks.



Users can see these requirements on the My Goals page.



If any of these limits are exceeded, error messages appear:



Considerations

- Neither Reviewees nor Reviewers of a Review task will be able to breach the configured weight and maximum goal limit via a Review task.
- This feature works best when the following Corporate Preference option is enabled: **Goals preferences and configuration respect the goal owner's OU**. Changes made to this setting affects all goals.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

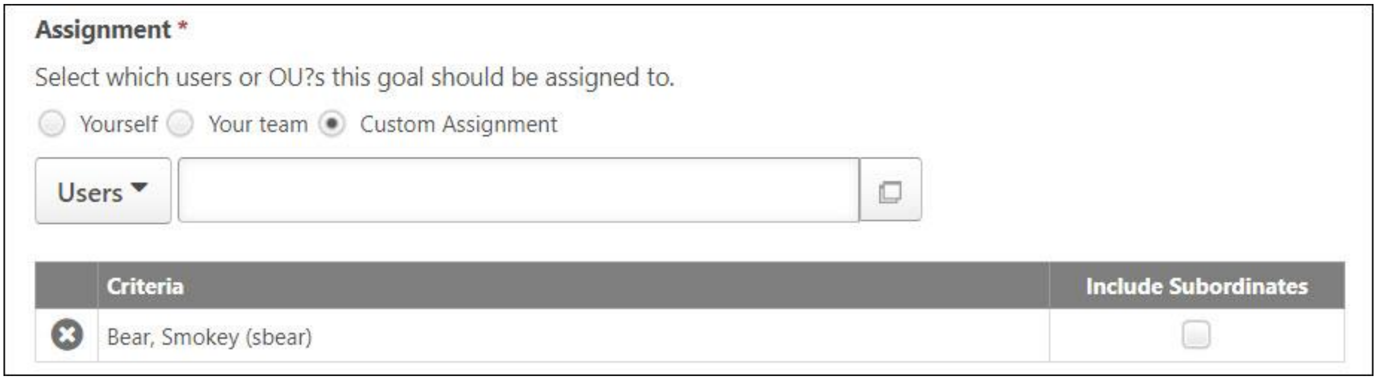
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Goal Preferences - Manage	Grants ability to manage Goal Preferences, where various goal features can be enabled or disabled according to the needs of the organization. This permission can be constrained by OU and User's OU. This is an administrator permission.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

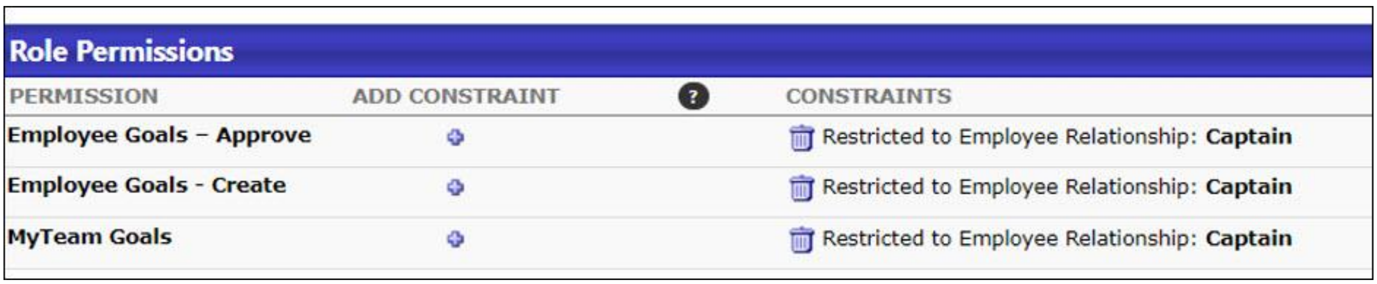
Goal Co-Planners

Prior to this enhancement, if goal approvers and creators were not available for a period of time, no one else had permission to create or approve goals in their absence.

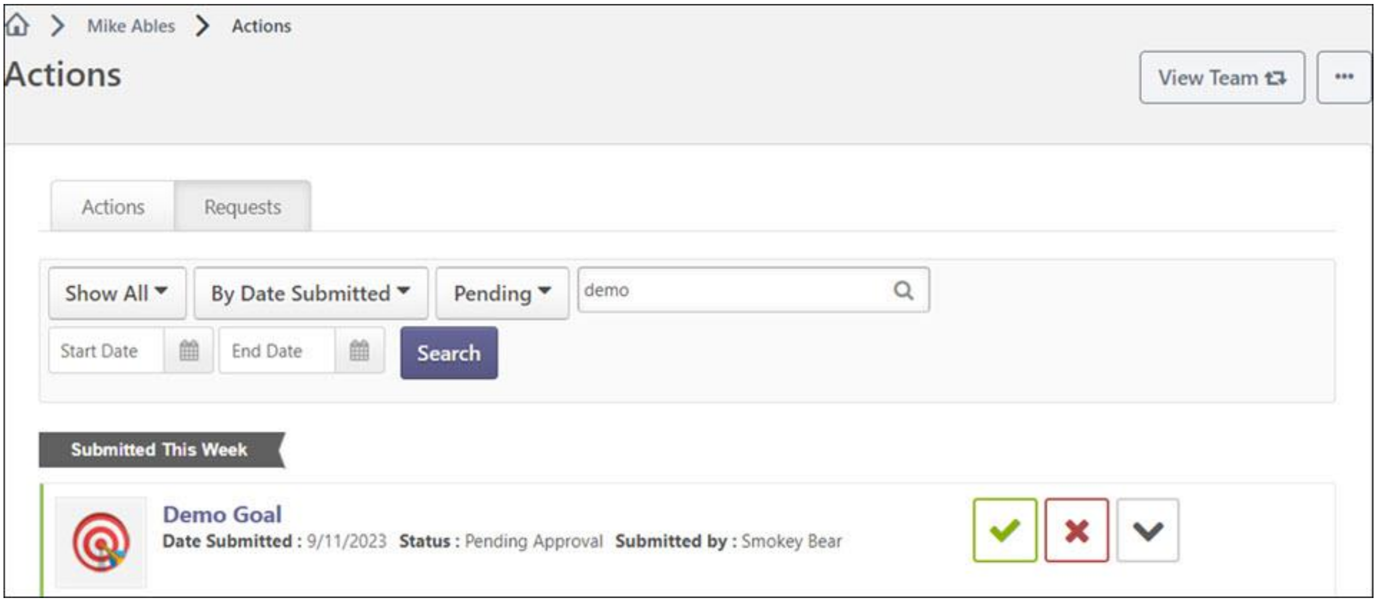
With this enhancement, administrators can grant goal creation and approval permissions to someone other than the manager/approver. These additional co-planners can create, view, and approve goals by being granted the following permissions:

- Employee Goals - Approve
- Employee Goals - Create
- MyTeam Goals

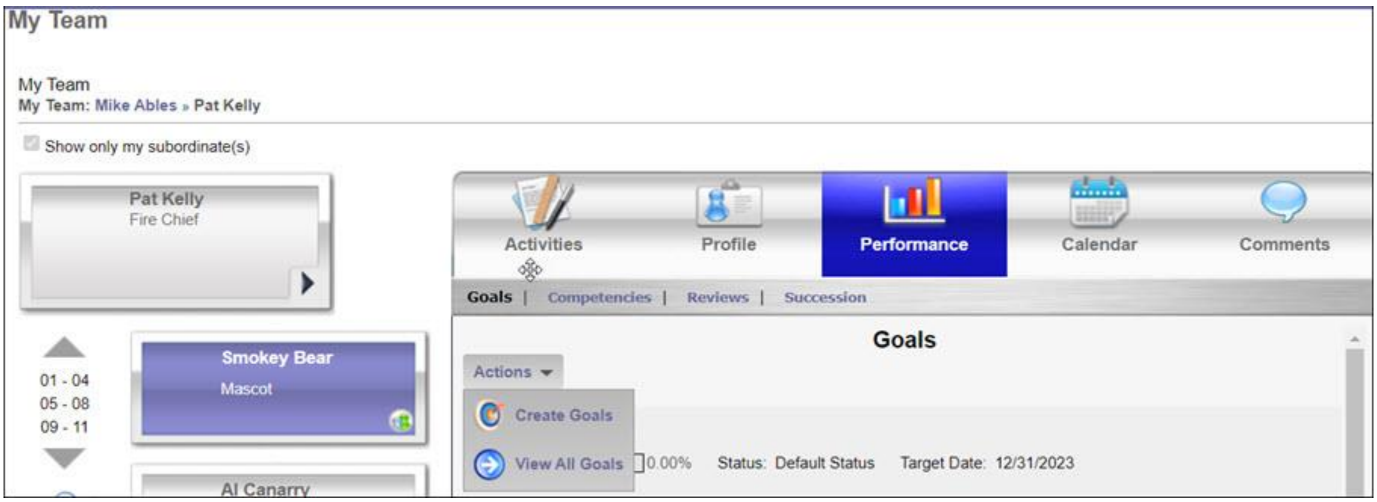




Once the permissions and security roles are allowed, the co-planner will see the items on their Actions tab.



Once enabled, the options to manage goals appear on the co-planners on the My Team page:



Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

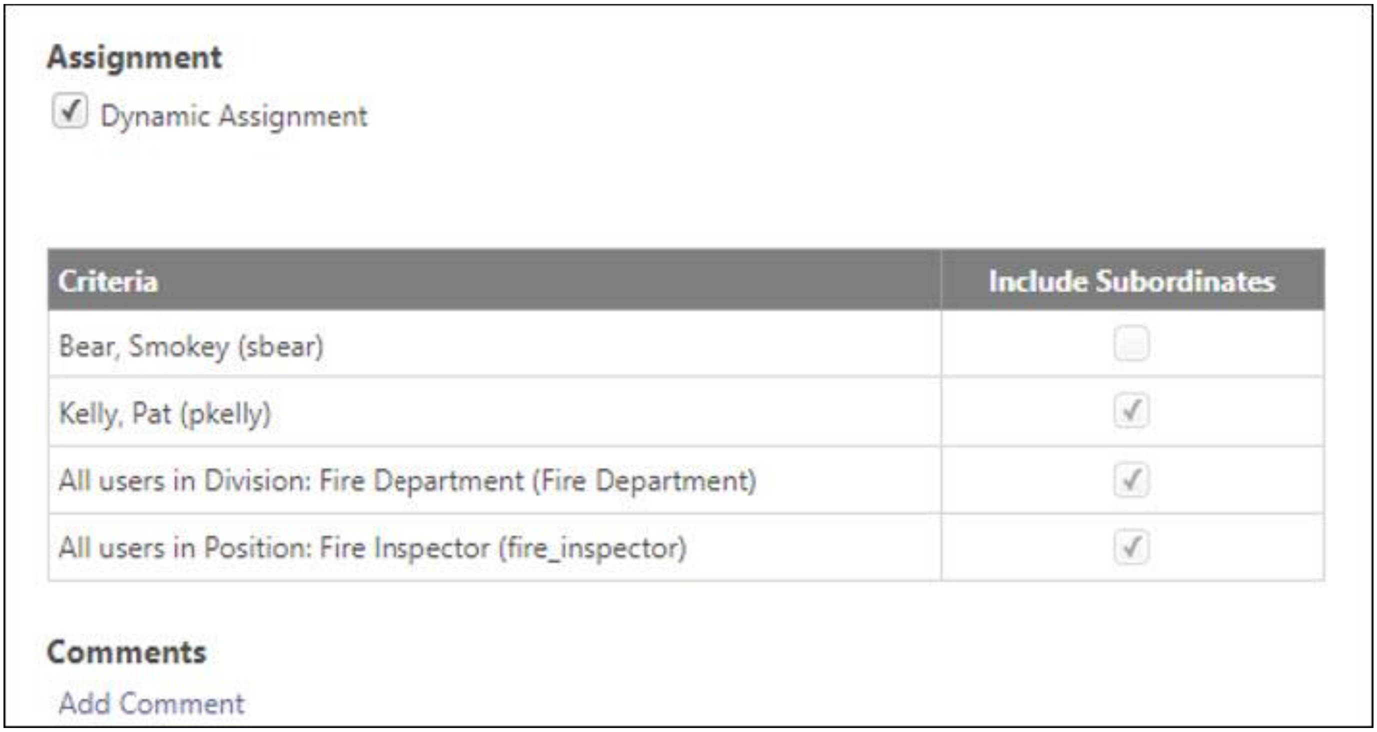
Security Administration - Manage	Grants ability to create, modify and constrain security roles within the portal, and assign users to those security roles. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates. This is an administrator permission.	Core Administration
Users - View	Grants the ability to search for and view summary information about users in the portal via the Admin/Users screen. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Users. If multiple constraints are added, these constraints are considered OR statements. This is an administrator permission.	Core Administration
Goals - Create	Grants ability for user to create goals for self, direct reports, and indirect reports only. Any constraint on this permission is operating as an "AND" function. This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance
MyTeam Goals	Grants ability for manager (or others depending on constraints) to view, edit and manage progress of Goals for their direct and indirect reports via MyTeam and Talent Profile. This permission can be constrained by OU, User's OU, User's Direct Reports, User, Employee Relationships, and User Self and Subordinates. The permission constraints determine for which users the Goals tab is available when viewing a user in My Team. ***Note:*** *By design, for any My Team permission that is included in the Manager default security role, all of the manager's direct and indirect reports are included in the constraints, even if they are not selected in the permission constraints for the role.* ***Note:*** *If the user's permission is also constrained by User Self and Subordinates, then this overrides the User's Direct Reports constraint.* **Note:** If this permission is constrained by Employee Relationships, assigned co-planners can create, view, and approve goals.	Performance

View a Goal's Dynamic Assignment Criteria

Prior to this enhancement, administrators were not able to view the criteria used to dynamically assign goals to users.

With this enhancement, administrators can view the dynamic assignment while viewing the details of the Dynamic Assignment Template in read-only mode.

To view dynamic assignment, go to PERFORMANCE > MANAGE SHARED AND DYNAMIC GOALS and select the edit icon for the appropriate item.



Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Shared and Dynamic Goals	Grants ability to turn off the dynamic behavior and edit a dynamic goal from the Edit Goals page. The administrator or manager can only view and edit goals created by users that exist within the OU constraints set for this permission.	Performance

Performance Reviews

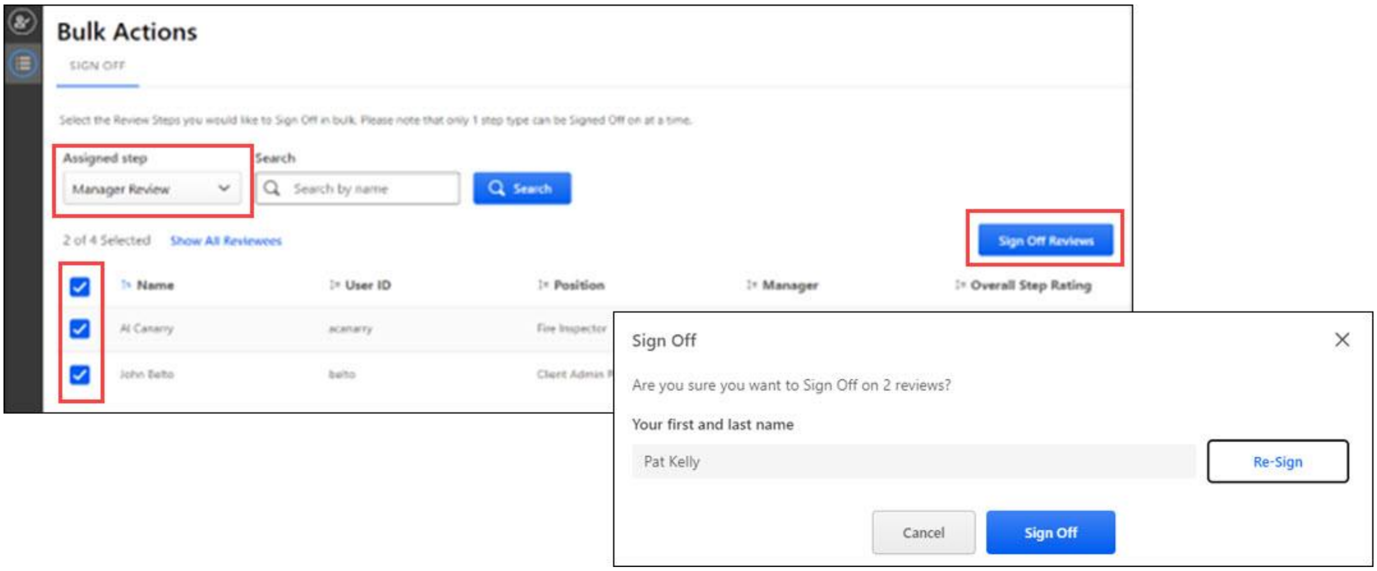
Review Task Central - Bulk Sign Off

Prior to this enhancement, bulk sign off on reviews was only allowed if sign-off was the only section for the step. Signers had to navigate to a separate link for each assigned review step.

With this enhancement, in Review Task Central, signers can sign off in one place, multiple steps in a single review task. This bulk sign off saves time and effort.

To use the bulk sign-off feature, the review step must include a sign off section and the electronic signature must be enabled for the signer. *See Create Review Section - Sign Off.*

To use this functionality, Review Task Central must be activated. *See Activating Review Task Central.*



Enable Bulk Sign Off

To enable bulk sign off:

1. Go to ADMIN > TOOLS > PERFORMANCE MANAGEMENT > TASK ADMINISTRATION.
2. Select the Review Workflow tab for the appropriate review.
3. In the Define Review Step section, check **Enable Bulk Submit for this Review Step** to allow bulk sign-off in Review Task Central. **Note:** This checkbox is only visible if a sign-off section is added and the sign-off section has e-sign enabled.

Bulk Sign Off Review of Review Tasks

To submit bulk sign off review tasks:

1. Go to PERFORMANCE > PERFORMANCE REVIEWS.
2. In the reviewer view, in the Review Actions menu, select the bulk action icon. The Bulk Actions page opens to display all bulk actions available to the reviewer.
3. Click the Sign Off tab.
4. In the Assigned step drop-down, select an option to enable the selection check-boxes.
5. Click one or more reviews to sign off on or search for specific assignees.
6. Click **SIGN OFF REVIEWS**.
7. In the confirmation window, in the Your first and last name box, enter your name. If you need to edit the signature, click **RE-SIGN** and re-enter the information.

8. Click **SIGN OFF**. **Note:** If an error message appears, go back and make the appropriate changes and attempt to sign-off again.
9. Click **CLOSE** on the confirmation message.

Note: Bulk Sign-off only signs off on the reviews. To submit the reviews, click the Submit tab.

Considerations

- Bulk sign-off is not available for self-review, peer, or subordinate review steps.
- A maximum of 1000 records will be displayed in the table at one time. As records are signed-off and automatically removed from the table, new records may appear, if necessary.

Implementation

Review Task Central must be enabled to use this functionality. *See Activating Review Task Central.*

Permissions

The following existing permissions apply to this functionality:

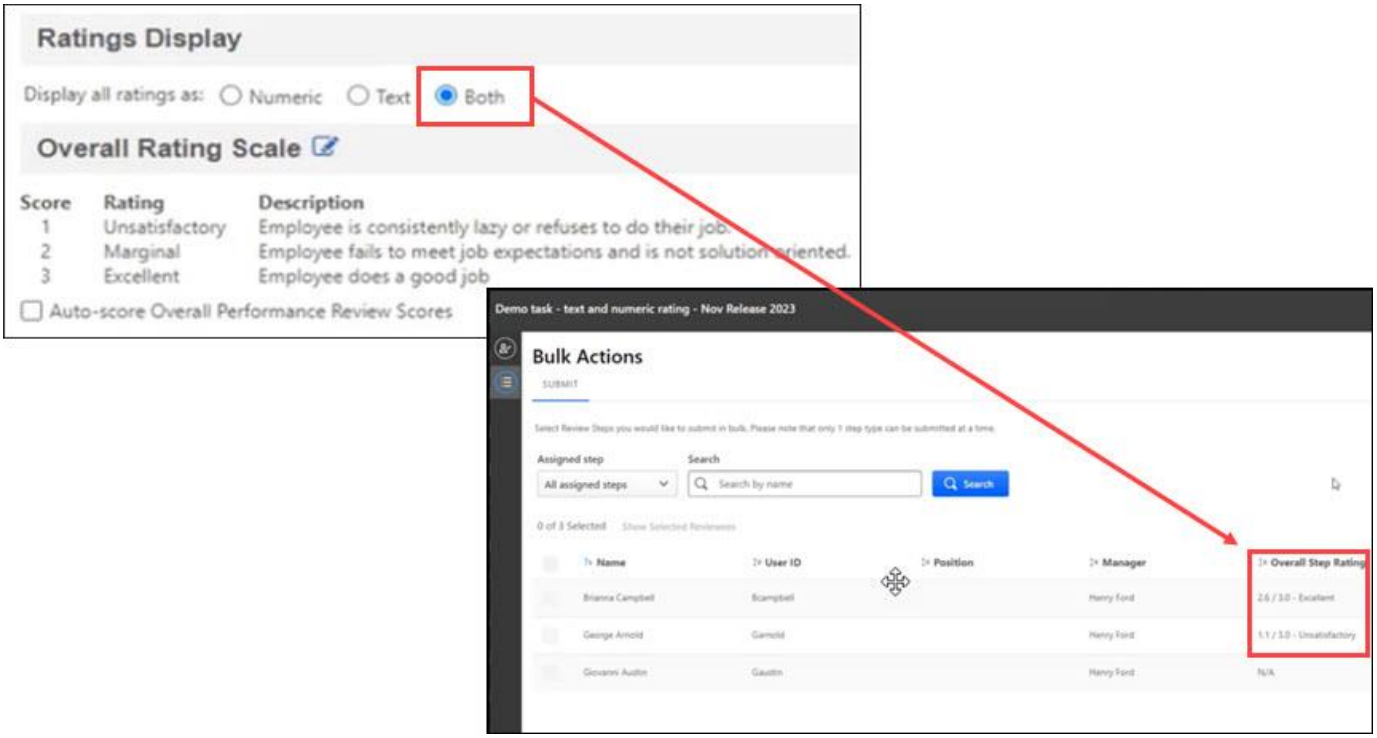
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission also gives the ability to enable and view co-planners for a task from the administration pages. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who have this permission and are within the Admin Visibility settings can view the task, edit the task, add users, and view the task details. However, the admin cannot edit the Admin Visibility settings for the task. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The constraints on this permission control which users can be added to the task.	Performance - Administration

Review Task Central Bulk Submit – Display Ratings as Text

Prior to this enhancement, the Overall Step Rating column in Bulk actions table displayed ratings in numeric format only, regardless of the rating scale set in Task Administration.

With this enhancement, the Overall Step Rating column displays the rating scale as Numeric, Text, or Both based on the scale setting set in Task Administration.

To use this functionality, Review Task Central must be activated. *See Activating Review Task Central.*



Implementation

- Review Task Central must be activated. *See Activating Review Task Central.*
- Bulk Submit must be enabled. *See Review Task Central - Bulk Submit.*

Permissions

The following existing permissions apply to this functionality:

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

Review Task Central – PDF Redesign

This functionality was available in stage portals on 10/26.

With this release, in Review Task Central, the improved Performance Review .pdf document will provide a more user-friendly, intuitive, and reliable user interface to for administrators, managers, and end-users.

Additionally, employees can easily add and configure their skills in the new Skills Assessment section.

Note: Review Task Central must be installed to access the new .pdf format. *See Activating Review Task Central.* Customers who do not activate Review Task Central will still see the old .pdf format.

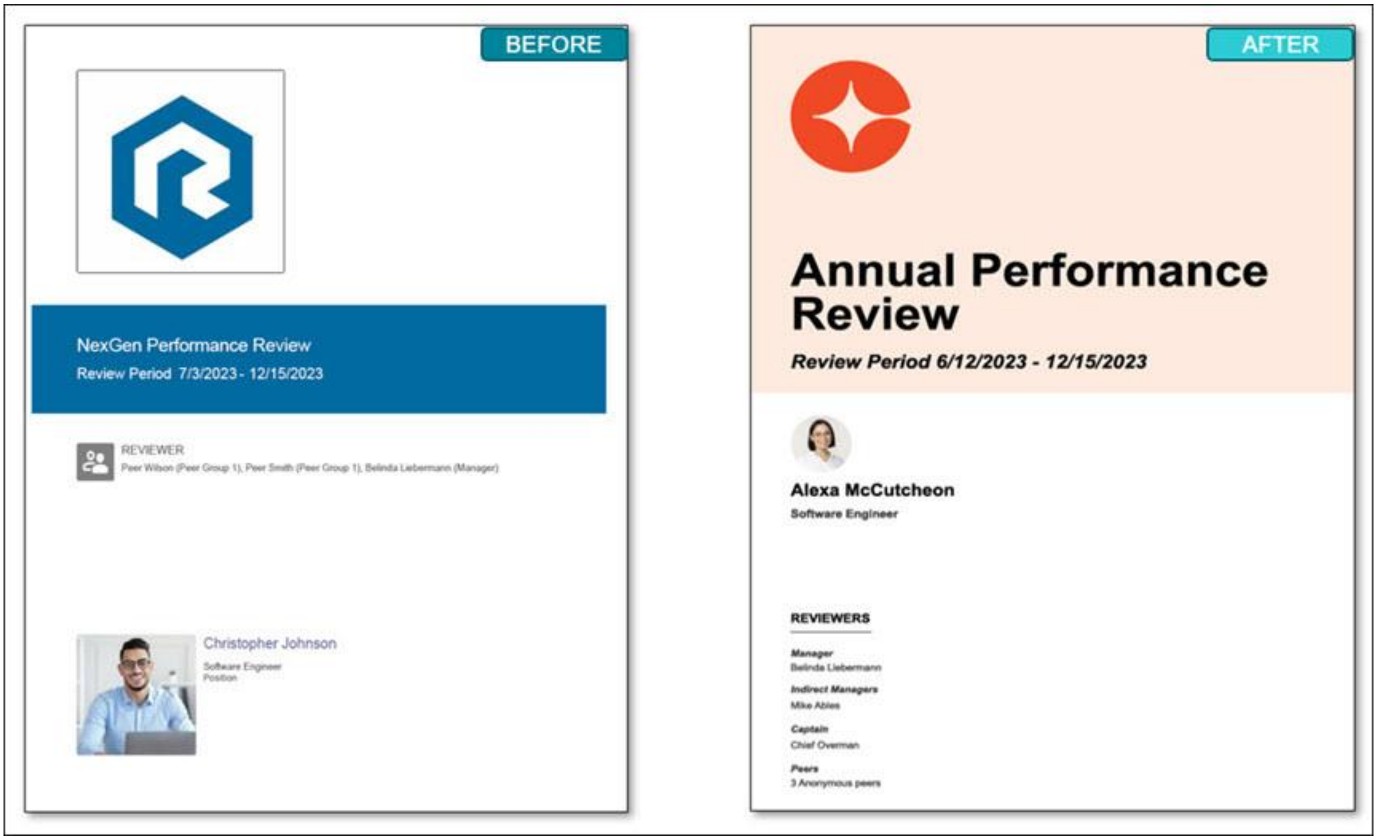
These changes affect the following pages of the Performance Review .pdf:

- Cover
- Overview
- Goal Planning
- Competency Assessment
- Questions List
- Goal Rating
- Development Plans
- Sign-Off
- Peer Review
- Manager's Assessment (Formerly "Manager Review")
- Summary

Note: While the look of each page changed, the information on the page remains the same.

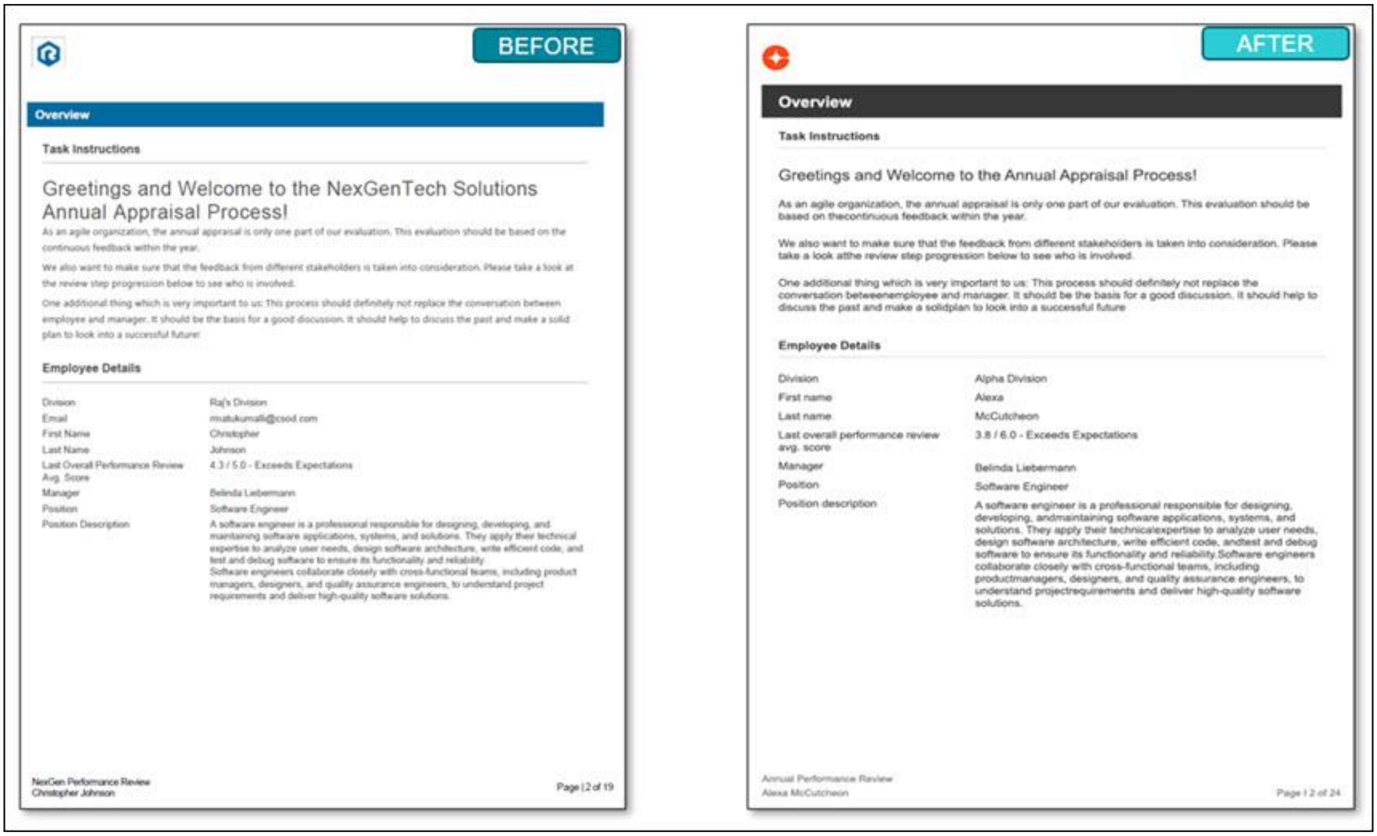
Cover Page

The new cover page provides a streamlined and organized experience, including separate line for each type of reviewer.



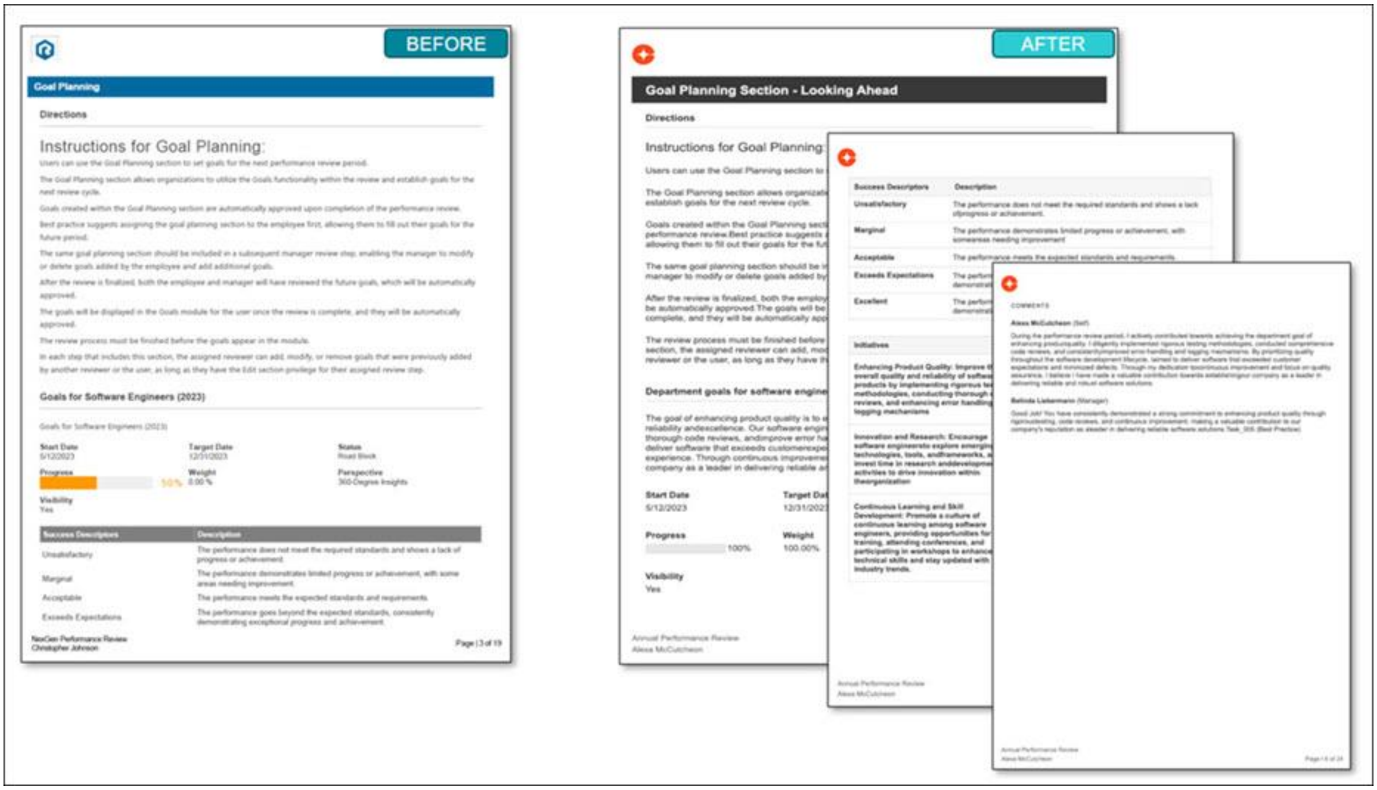
Overview Page

The Overview page content remains the same; the only change is the branding colors.



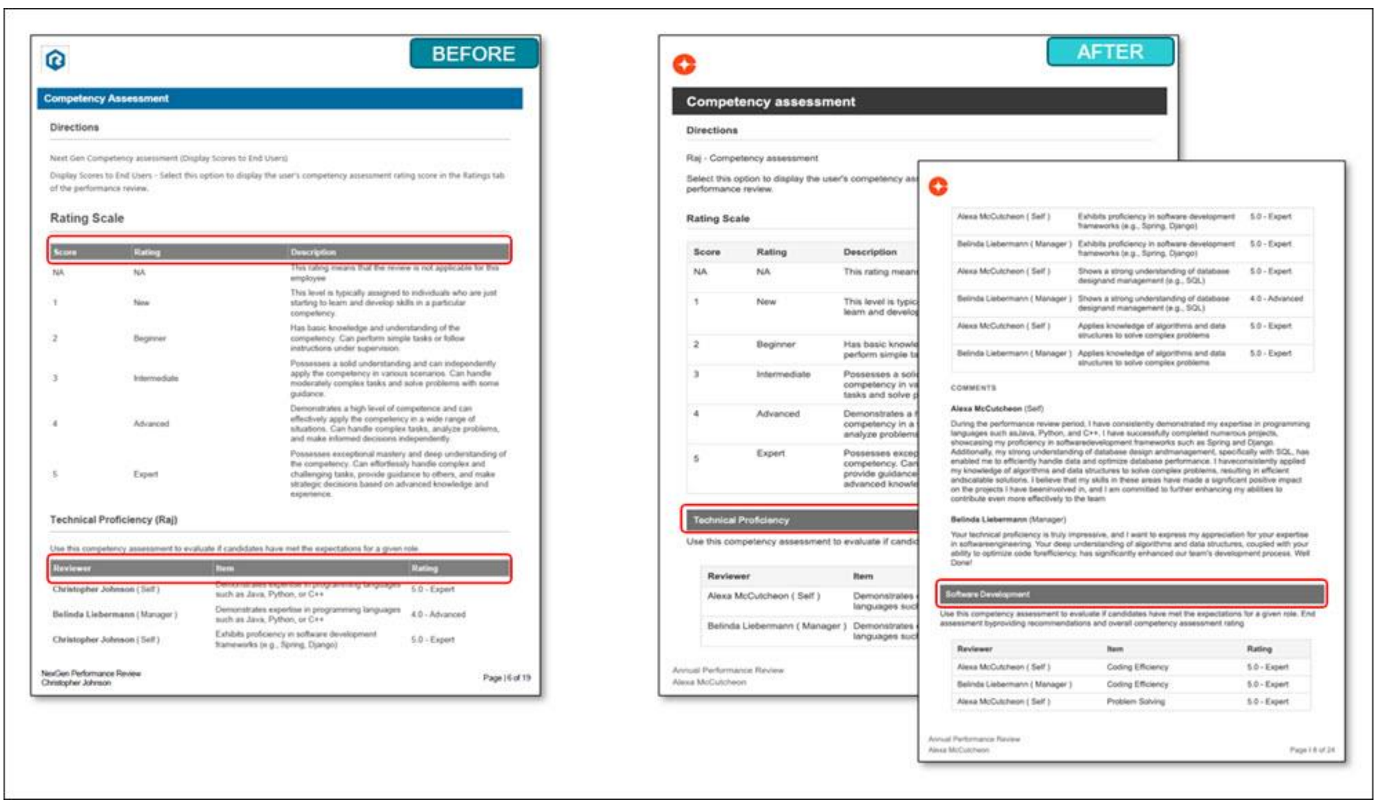
Goal Planning Page

The new Goal Planning page clearer emphasis and improved information architecture.



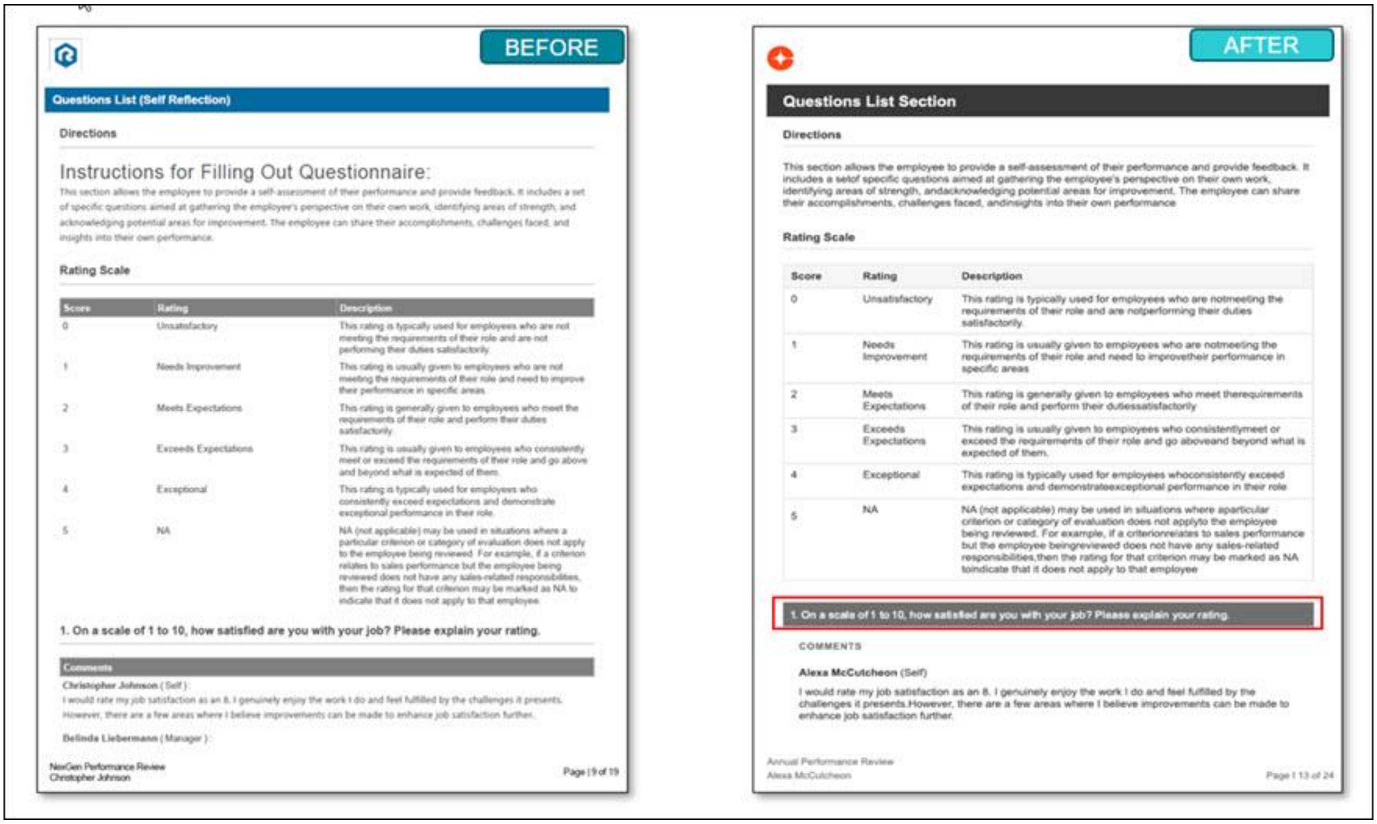
Competency Assessment

The Competency Assessment page provides clearer emphasis and information architecture.



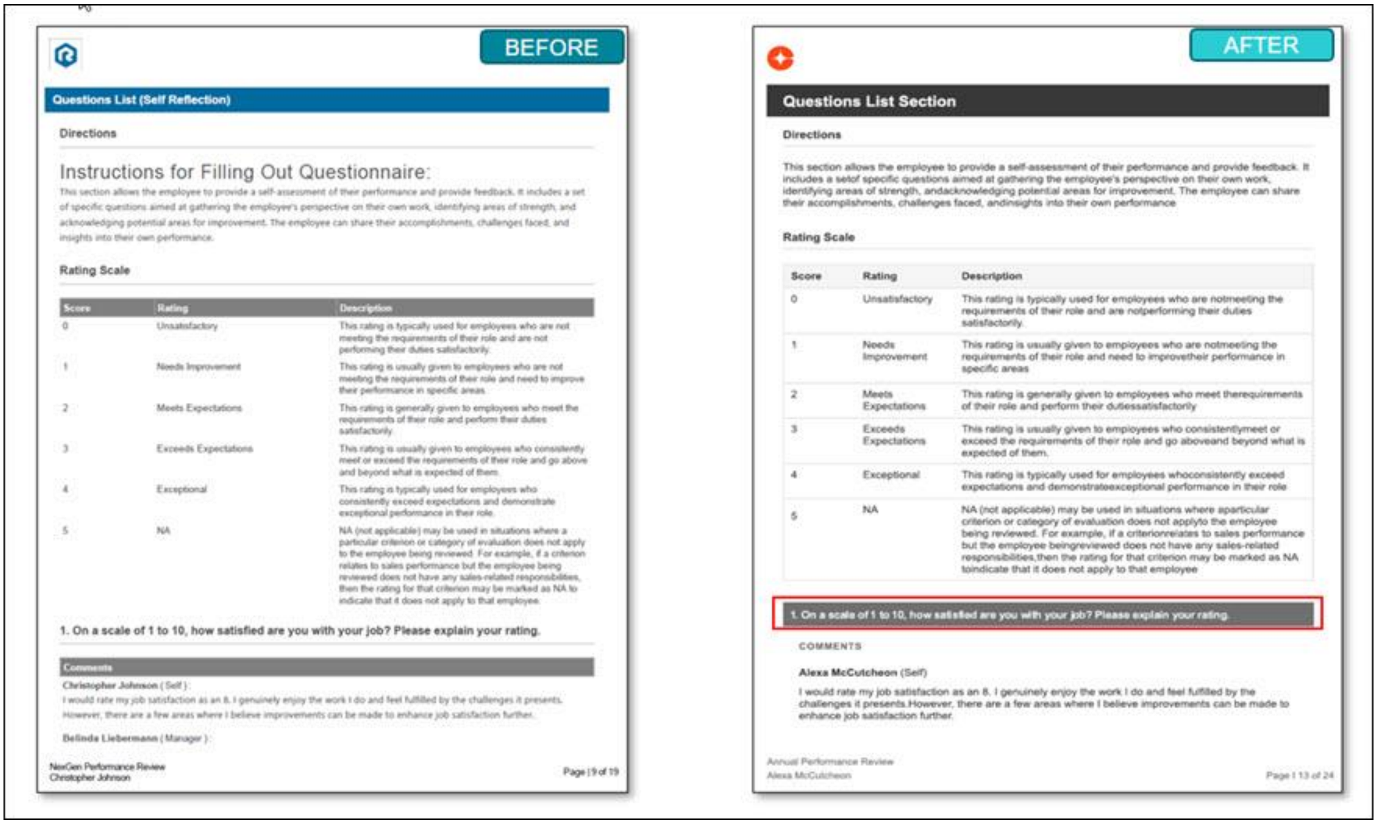
Questions List

The Questions List page provides clearer emphasis and information architecture.



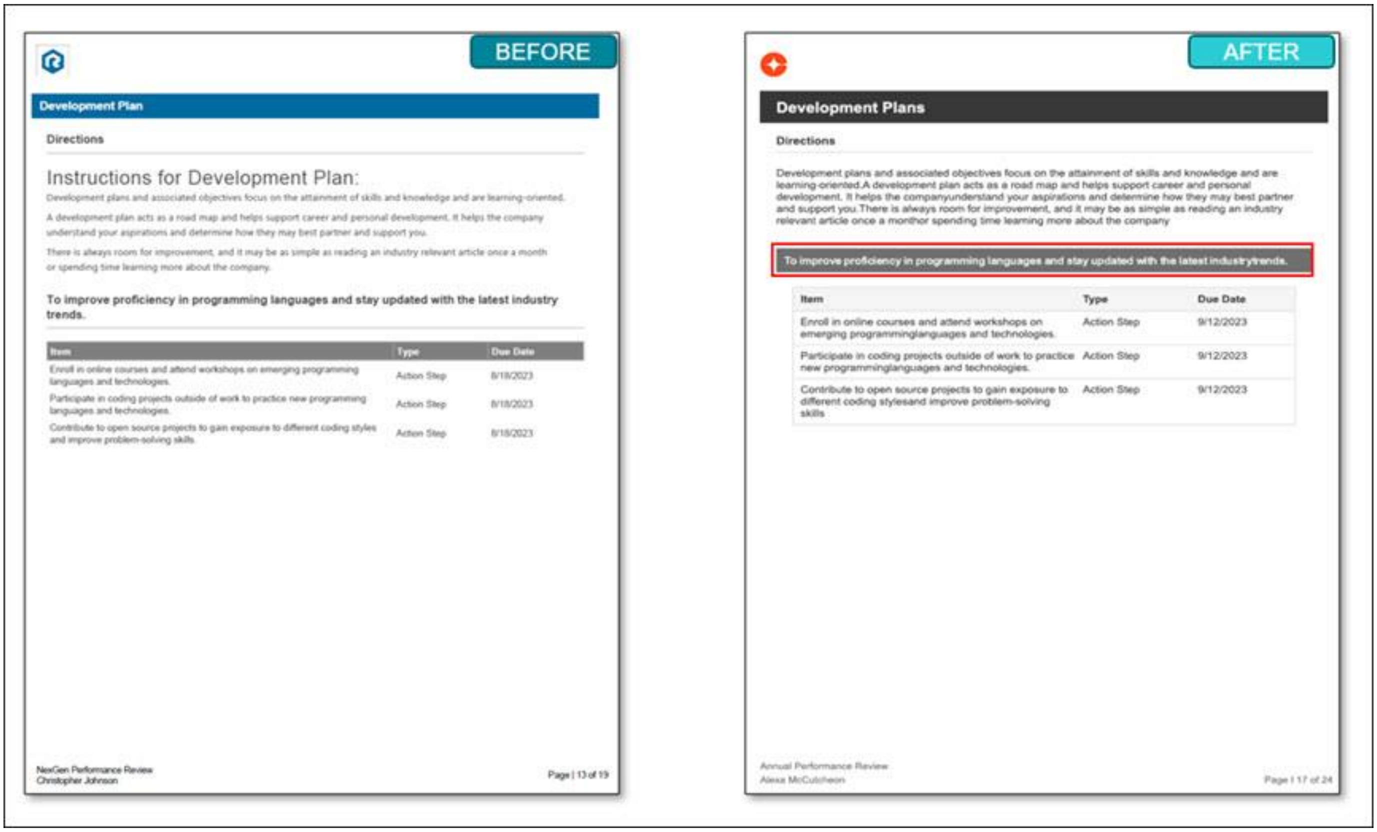
Goal Rating

The Goal Rating page provides clearer emphasis and information architecture.



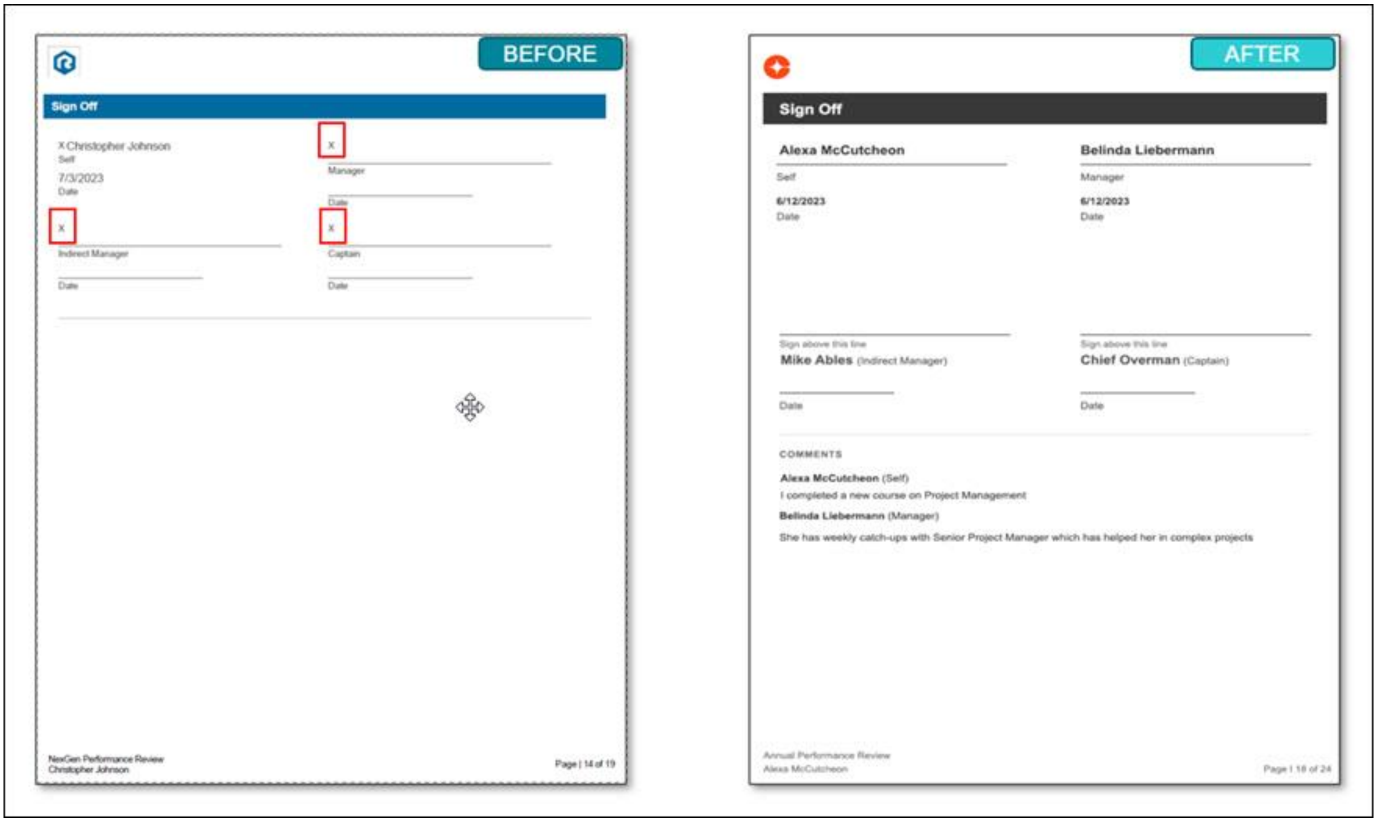
Development Plan page

The Development Plan page provides clearer emphasis and information architecture.



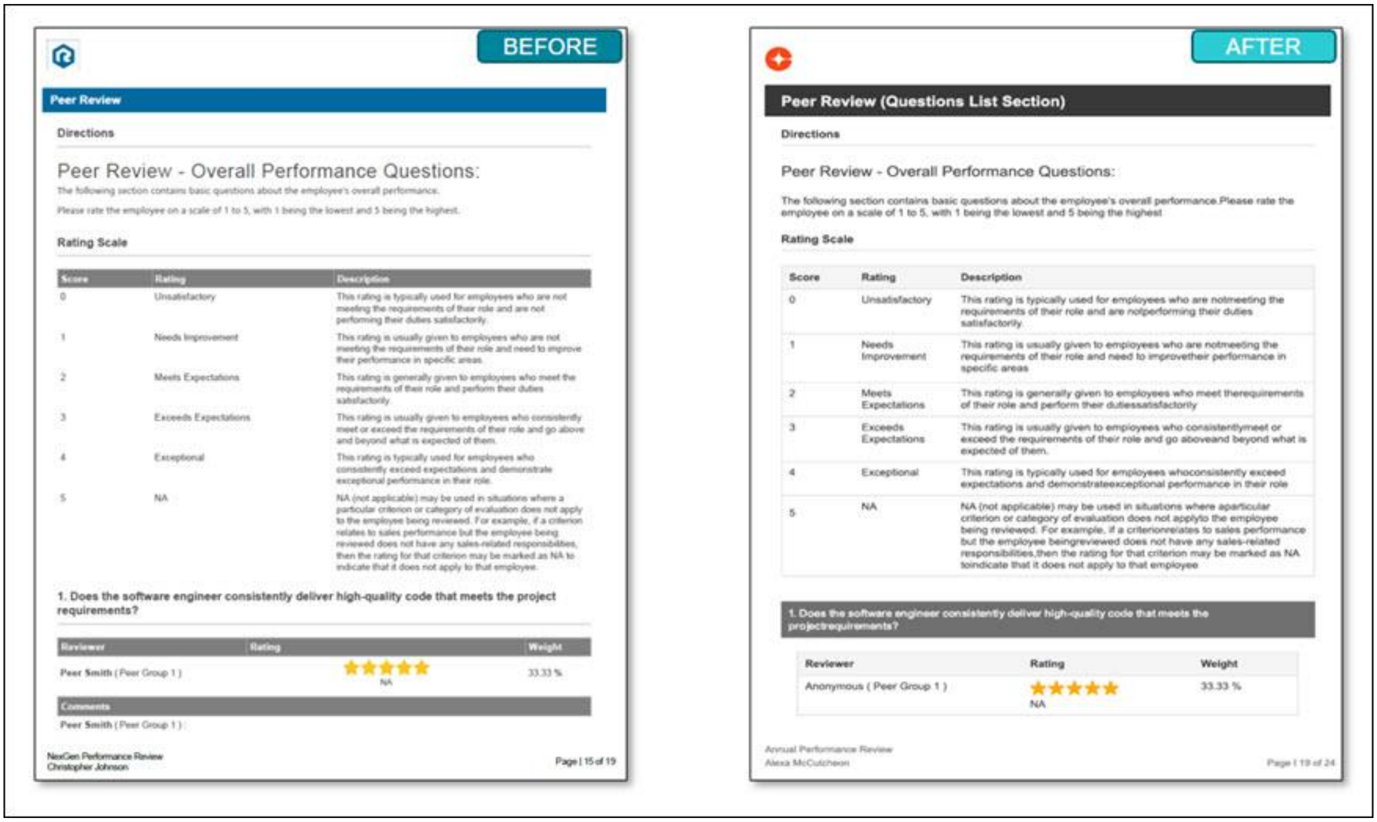
Sign-Off

The Sign Off page process is streamlined for enhanced clarity.



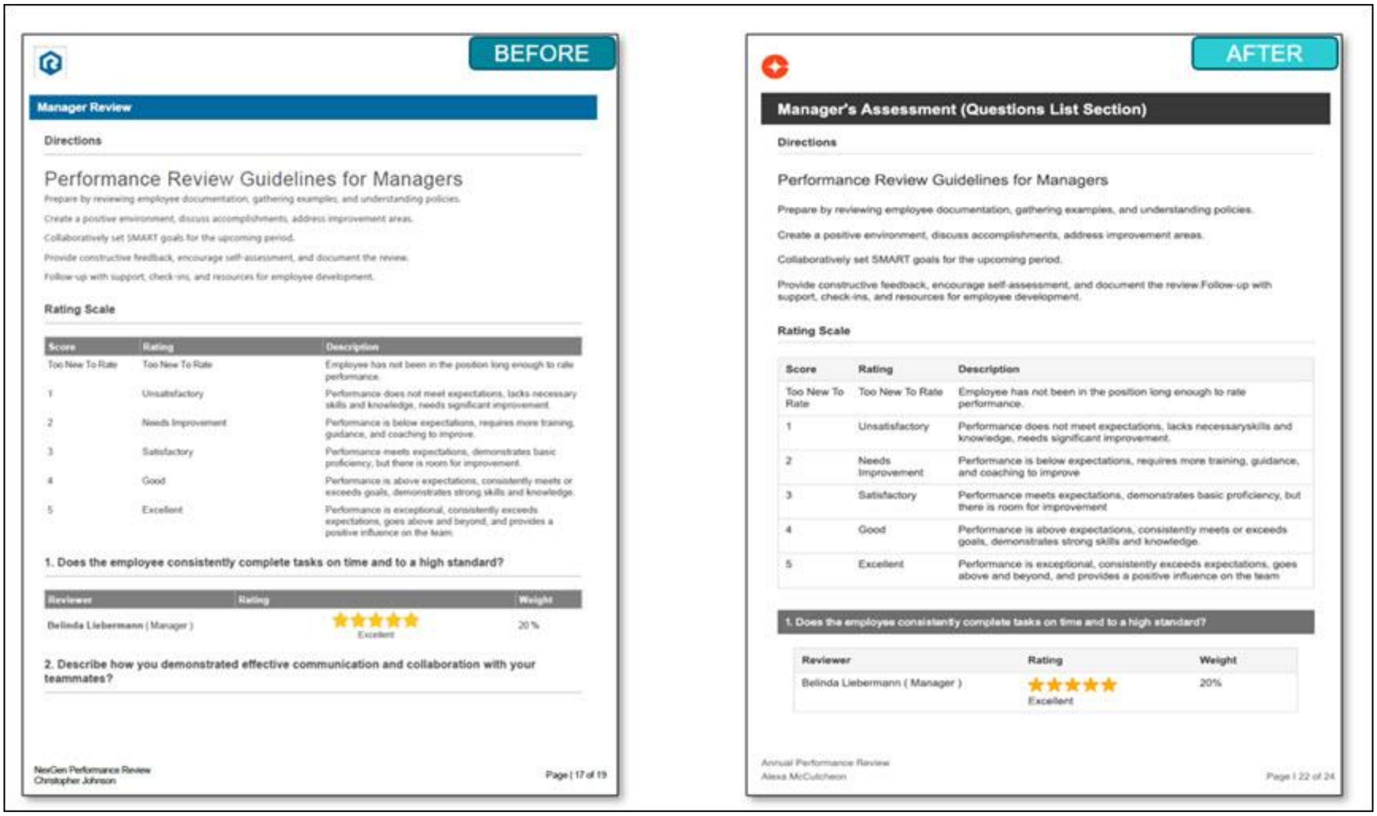
Peer Review

The Peer Review page provides clearer emphasis and improved information architecture.



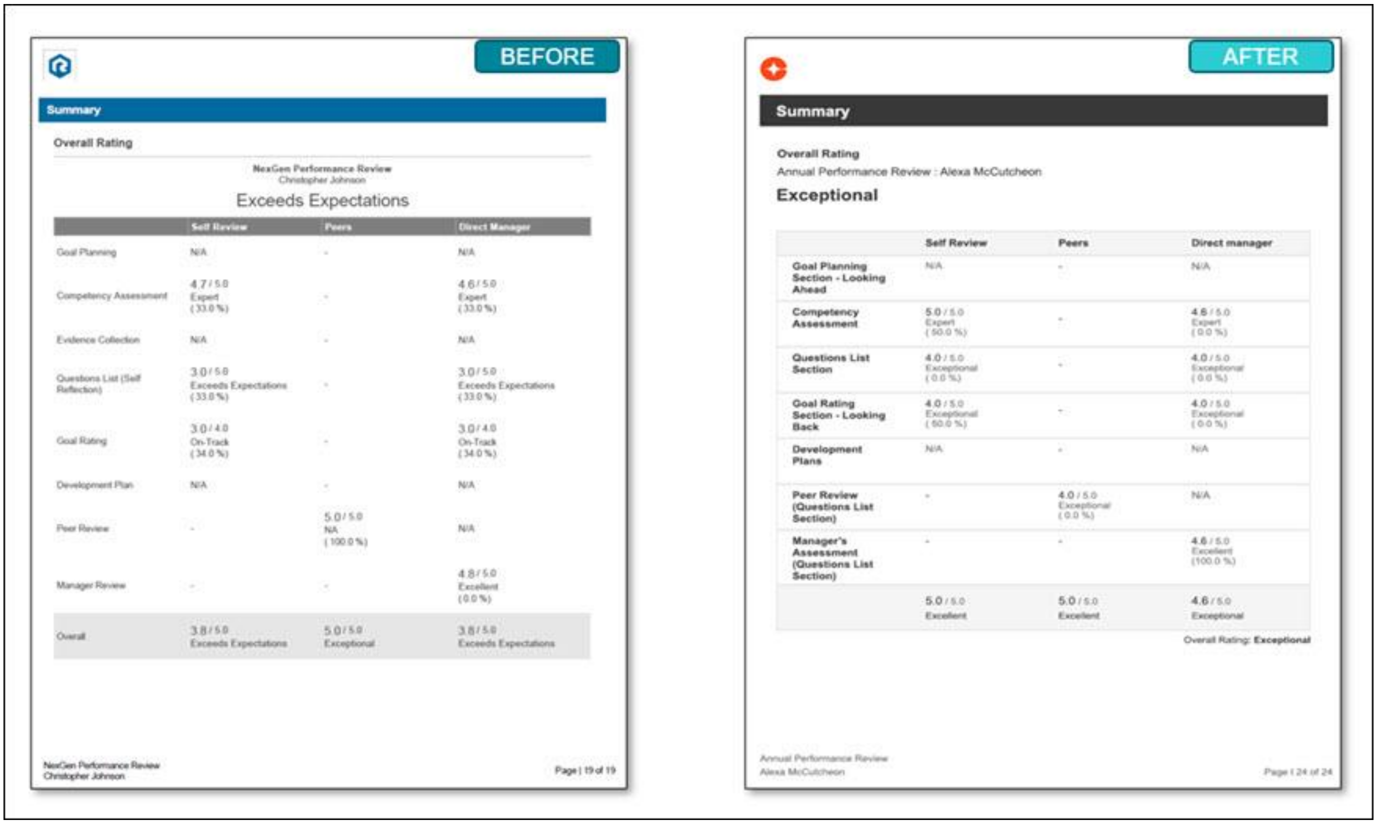
Manager's Assessment

The Manager's Assessment page provides clearer emphasis and information architecture.



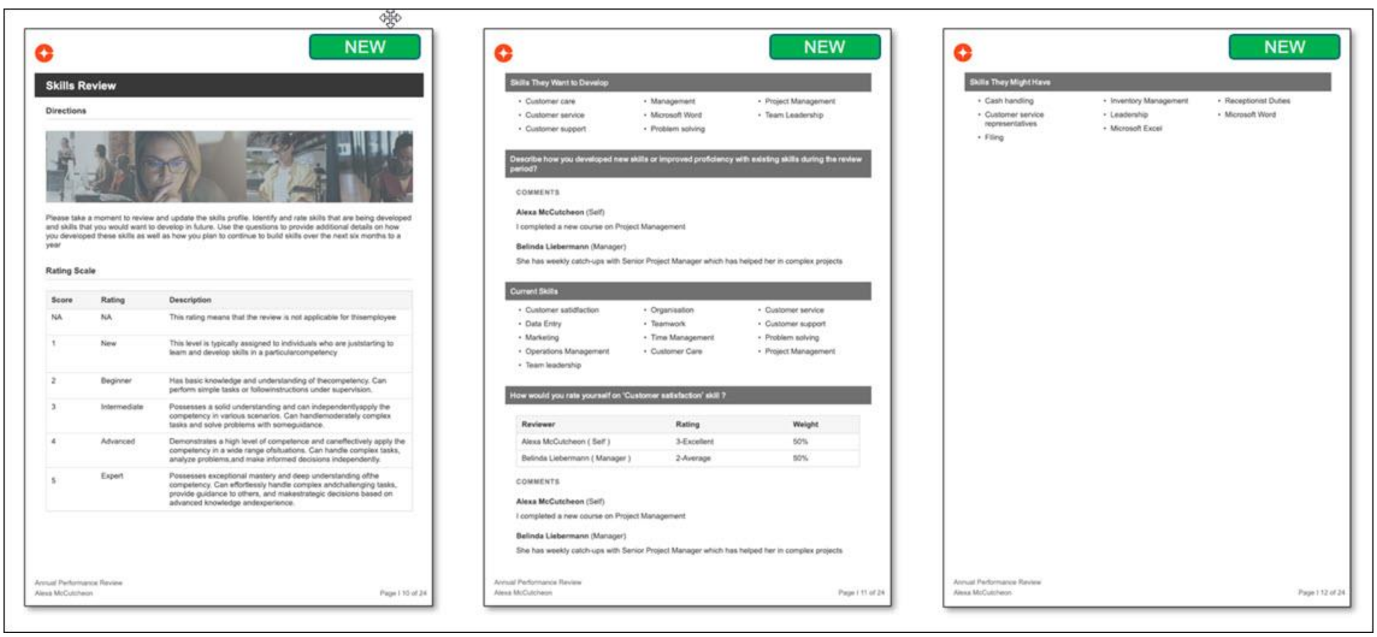
Summary

The Summary page is streamlined to focus on the overall rating.



Skills Assessment

Employees can easily add and configure their skills in the new Performance Review Skills Assessment section.



Considerations

The new .pdf format also applies to closed and expired tasks once Review Task Central is activated and a new .pdf is generated.

Implementation

This functionality is not automatically enabled. Organizations must activate Review 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
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core
View Performance Reviews	Grants ability to view the Performance Reviews page, which displays a user's own past performance reviews as well as performance review task steps they've been assigned to complete. This also grants ability to view the Batch Rating page. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an end user permission.	Performance

Recruiting

Recruiting Enhancements

Candidate Skills Match

Candidate Skills Match (Early Adopter)

Prior to this release when vetting candidates, recruiters manually reviewed resumes to identify potential candidates for a position. This process can be time-consuming and frustrating.

With this release, on the Manage Candidates page, a new "Candidate Matching Score" field is provided. The candidate skills match score is calculated by matching a candidate's profile against the requisition's job description.

Additionally, on the updated Skills Matching Summary Flyout, recruiting teams can quickly identify and review which candidates have the highest number of matching skills and relevant work history. This ensures that organizations do not miss out on top talent.

Enable Candidate Skills Match

To enable this feature, administrators can go to ADMIN > RECRUIT > FEATURE ACTIVATION and select Candidate Skills Match.

Once enabled, an administrator **must** configure location Organizational Units (OUs) where matching is required by going to ADMIN > RECRUIT > COMPLIANCE ENABLEMENT and checking the **Enable Candidate Skills Match** option under the Applicants section.

Candidate Matching Score Column

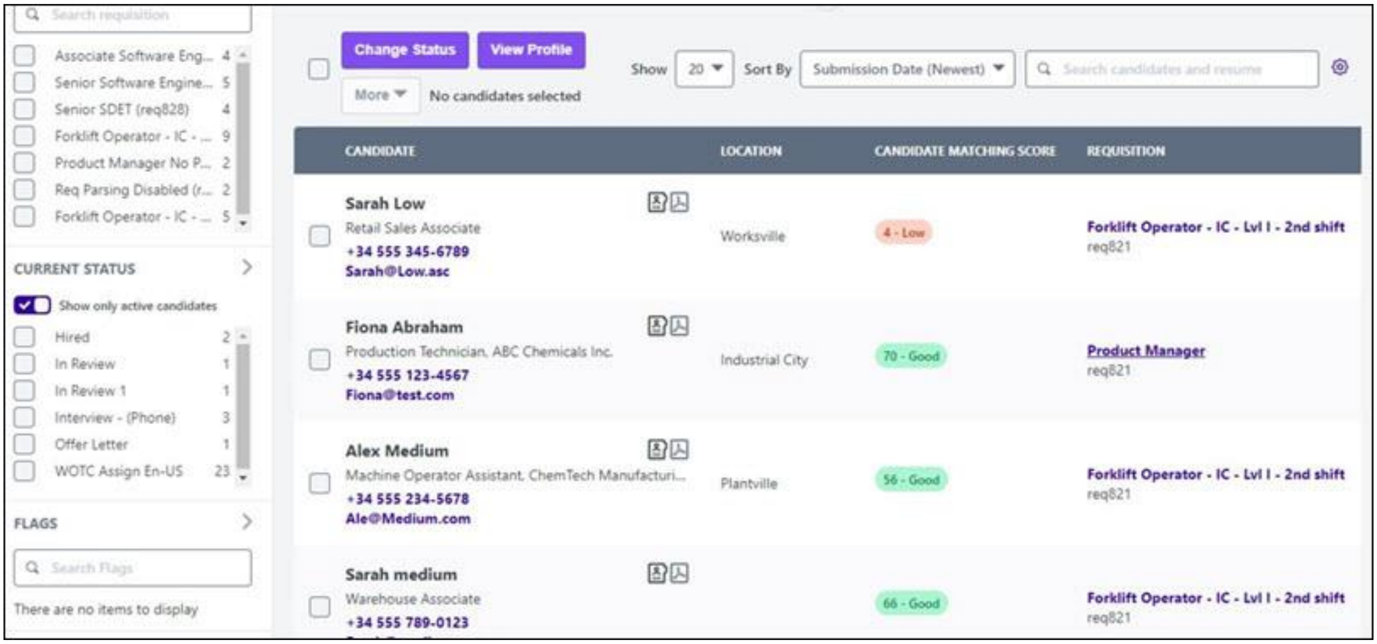
To access the Manage Candidates page, go to HOME > RECRUIT > MANAGE CANDIDATES.

If enabled, matching begins when a candidate submits an application with a resume attached in .doc, .docx, or .pdf format. Scoring is based on the candidate's resume /work experience matched against the requisition's job description, job qualifications, and Position Title.

Scores appear in the Candidate Score column as follows:

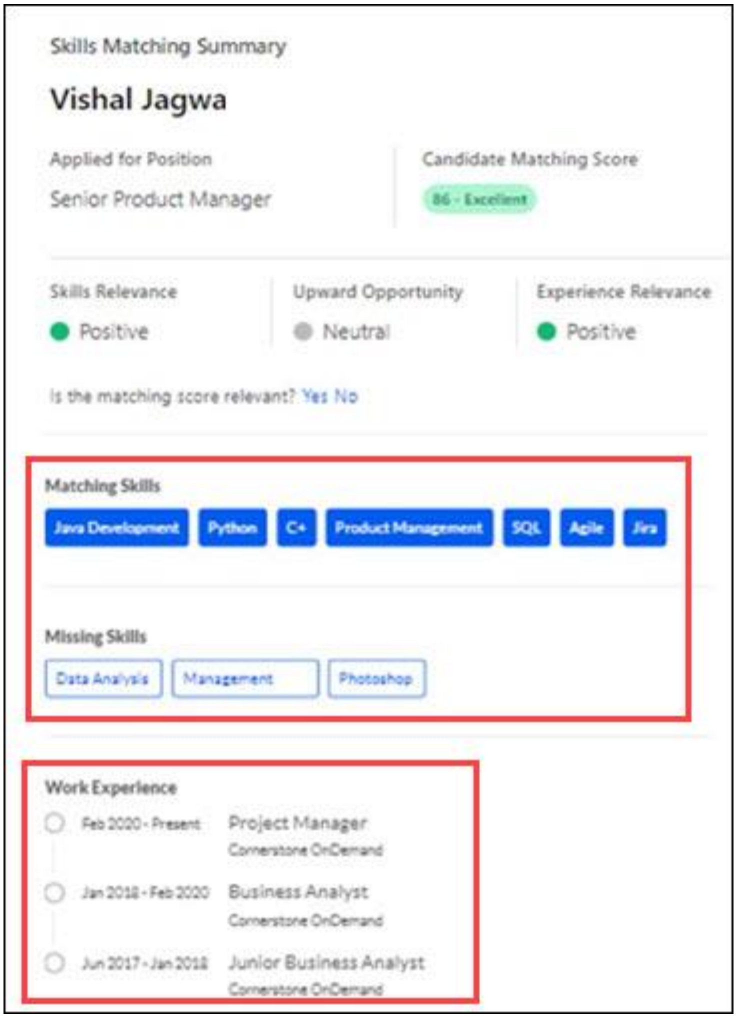
- 76 to 100 – Excellent
- 51 to 75 – Good
- 26 to 50 – Fair
- 0 to 25 - Low

Note: *If the resume is not attached to the application, the score is blank. For better scoring, it is recommended that parsing for previous work experiences is enabled.* *See Application Workflow - Upload Attachments.*



Skills Matching Summary Flyout

Recruiters can click on any Candidate Score to open Skills Matching Summary flyout.



The flyout displays the following additional details:

- Skills Relevance – Predicts how well the candidate's skill match the position
- Experience Relevance – Predicts whether the candidate's experience matches the position
- Upward Opportunity - Predicts how well the current position matches the candidates career path.
- Is the matching score relevant? question - Recruiters can submit feedback about whether the scores calculated were appropriate or needed fine tuning.
- Matching Skills and Missing Skills - Items mapped in the customer's Capabilities Library are now visible in these sections. **Note:** If the skills identified are not mapped in the Capabilities library, then the Skills Graph keys display. *See Capabilities Library - Create/Edit Capability.*
- Work Experience - Only visible if work experience parsing is enabled for the application.

Considerations

- Matching is done only for locations where candidate skills match is enabled under ADMIN > RECRUIT > COMPLIANCE ENABLEMENT.
- With this release skills matching is only supported for External Career Site, Internal Career Site, Add/ Move to Requisition, and Snapshot workflows.

- If the Capabilities Library is not configured, on the Skills Matching Summary flyout, information in the Matching Skills and Missing Skills fields will be displayed as keys and might not be translated to the logged-in user's language.

Implementation

- This functionality is **not** enabled by default. To enable, go to ADMIN > RECRUIT > FEATURE ACTIVATION and select **Candidate Skills Match**.
- This functionality is available in all environments.
- In the Matching/Missing skills section, to display only skills mapped in the Capabilities Library and ignore the Skills Graph skills, 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
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:*** *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.*	Recruiting
Applicants: Comments - View	Grants ability to view comments for applicants.	Recruiting
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

The following new permission applies to this functionality:

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

Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '24 Release

The ability to perform Requisition Template data loads using DLW will be deprecated with the November ’24 Release. Support for DLW Requisition Template loads will also stop. Customers are encouraged to begin using Edge Import for their Requisition Template loads prior to the deprecation.

Data Load Wizard is a legacy data load tool, built on older technology, with limited load type support, a dated user interface (UI), and slow performance. Edge Import addresses these issues with a modern UI and an intuitive workflow that can support a greater number of concurrent loads, while providing administrators with a delightful user experience. Edge Import (EI) offers manual loads and automated scheduled feed abilities.

Deprecation Milestones

Phase 1 - August '22 Release:

- Introduce Requisition Template Edge Import Load.
- Support for translation loads.
- Support all existing fields in EI as supported in DLW.
- Allow update of Requisition Template through EI even if the template is edited from UI.

Phase 2 – March ‘23 Release:

- Support updates to templates based on Requisition Template ID along with Requisition Template Reference ID.
- Allow update to templates from EI for templates created from UI.

Phase 3 – July ’23 Release:

Ÿ Support Feeds for Requisition Template load in Edge Import

Phase 4 – July ’24 Release:

Support Requisition Template Status List upload through Edge Import.

November 24, 2024

Ÿ Stop support and full deprecation.

See **Edge Import Fundamentals - System Administrator Training** for more information.

Manage Applicants Deprecation with the March '24 Release

The Manage Applicants deprecation ensures all users benefit by using Manage Candidates enhanced, mobile-friendly user experience to quickly and effectively assess and manage all their candidates through the hiring process.

Prior to deprecating the Manage Applicants user interface (UI) in March 2024, Cornerstone will bring the most commonly used workflows to Manage Candidates to reduce complexity, making the Manage Candidates page simpler to use.

With the Manage Applicants deprecation, Manage Candidates becomes the single source to assess and manage all candidates.

The following paths will be redirected from Manage Applicants to Manage Candidates:

- Recruit > Manage Requisitions > Applicants, Referrals and New Submissions link
- Recruit > Review Applicants > Applicants and In Review link
- Recruit > Hiring Dashboard > New Submissions, In Review, Interview, Background Check, Other Statuses, Offer Letter and Active Applicants links
- Recruit > Recruiting Dashboard > Recent Referrals link

Hiring Manage Shortlisting: Hiring Dashboard will redirect to Manage Candidates. There will be a temporary exception for existing customers who are still using the non-supported Hiring Manager Shortlisting feature – this scenario will access the Carousel from Manage Applicants.

Deprecation and Feature Parity Milestones

July ‘23 Release

- Send Emails to candidates with attachments/reply to candidate responses with or without attachments
- Configure reply-to address so the candidates’ responses are not sent to the recruiter’s email address

November ‘23 Release

- Receive Attachments from Candidates in Manage Candidates
- Setup emails with CC
- Setup CC addresses and attachments in Email Templates
- Pre-screening questions as filters on Manage Candidate

March ‘24 Release

- Deprecation
- Manage Candidates available to managers and reviewers
- Expand Selection to 100 in Manage Candidates
- Send email from Manage Candidates with custom tags
- Sort by last name in Manage Candidates

July '24 Release

Star Rating in Manage Candidates

Hiring Manage Shortlisting

There will be a temporary exception for existing customers who are still using the non-supported Hiring Manager Shortlisting feature – this scenario will access the Carousel from Manage Applicants.

Manage Candidates

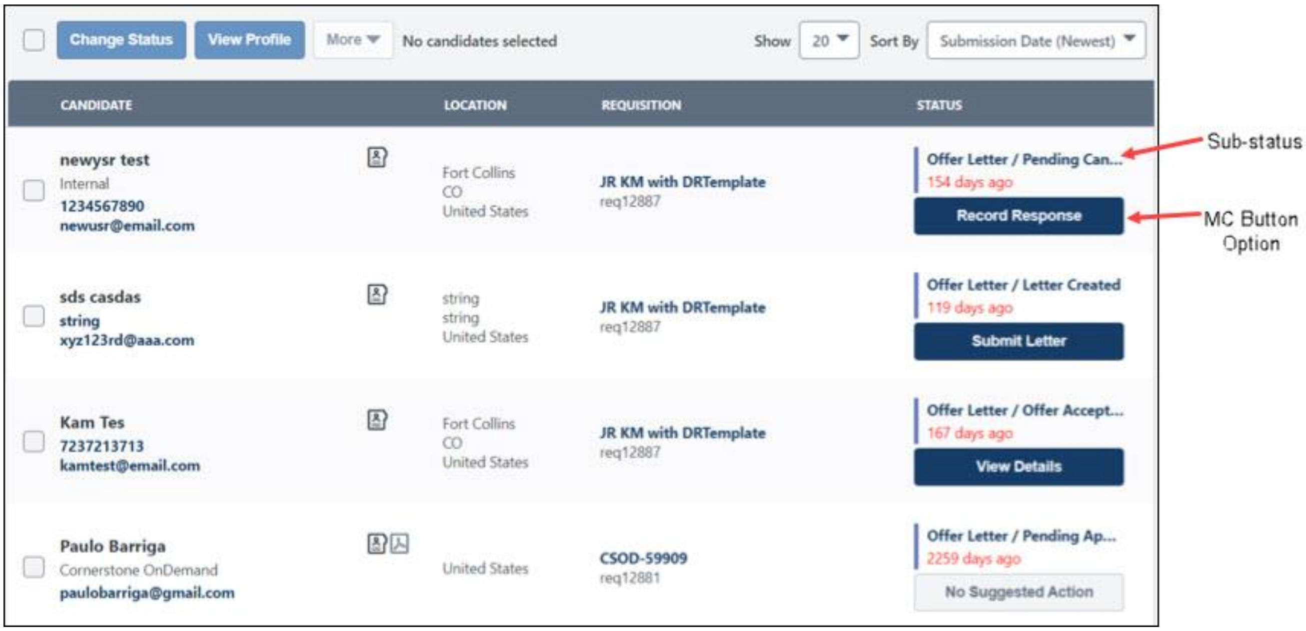
Offer Letter Enhancements

With this release, for the modular offer letter functionality, the following enhancements are provided to improve and simplify this process:

- New sub-status and action buttons on the Manage Candidates page
- Sub-status details visible in multiple locations
- No default Start Date for offer letters
- New editor for offer letter templates

Manage Candidates Page Updates

The Manage Candidates page Status column now displays a sub-status and new action buttons. Additionally, some functionality displayed on later pages is now surfaced to the Manage Candidates page, such as the Create Offer Letter button.



The following information is provided in the Status column:

If ...	Sub-status is...	MC Button Option is...	Button Action
No letter created	No offer created	Create Offer Letter	Opens Offer Letter Creation page
Letter is being generated	Letter in Preparation	View Details	Opens Applicant Status tab
Letter created	Letter Created	Submit Letter	Opens Applicant Status tab
Letter approved by all internal approvers OR Letter doesn't require internal approval*	Letter Approved	Send to Candidate	Opens Applicant Status tab

Letter is submitted for internal approval	Pending Approval	No suggested action	Opens Applicant Status tab
One internal approver denies	Approval Denied	View Details	Opens Applicant Status tab
Letter submitted to candidate	Pending Candidate's Response	Record Response	Opens Record Response page
Candidate accepted offer	Offer Accepted	View Details	Opens Applicant Status tab
Candidate rejected offer	Offer Rejected	View Details	Opens Applicant Status tab

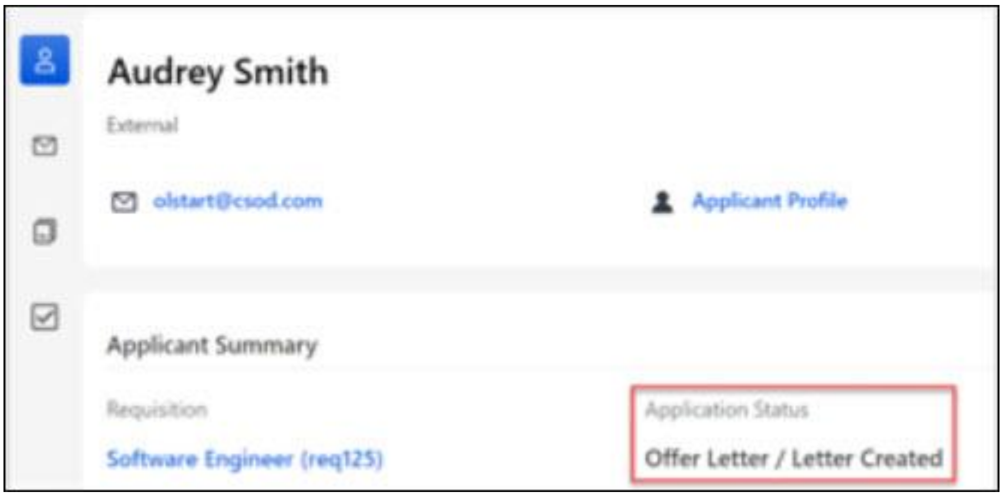
Note: Items in red are new sub-statuses, button options, and button actions.

*If the letter does not require approval, as per the existing experience, it still must be submitted. It then automatically moves to "letter approved" status.

Sub-Status Details

The sub-status also appears in the following locations:

Candidates Profile page



Applicant Profile page

Applicant Profile page - Summary tab

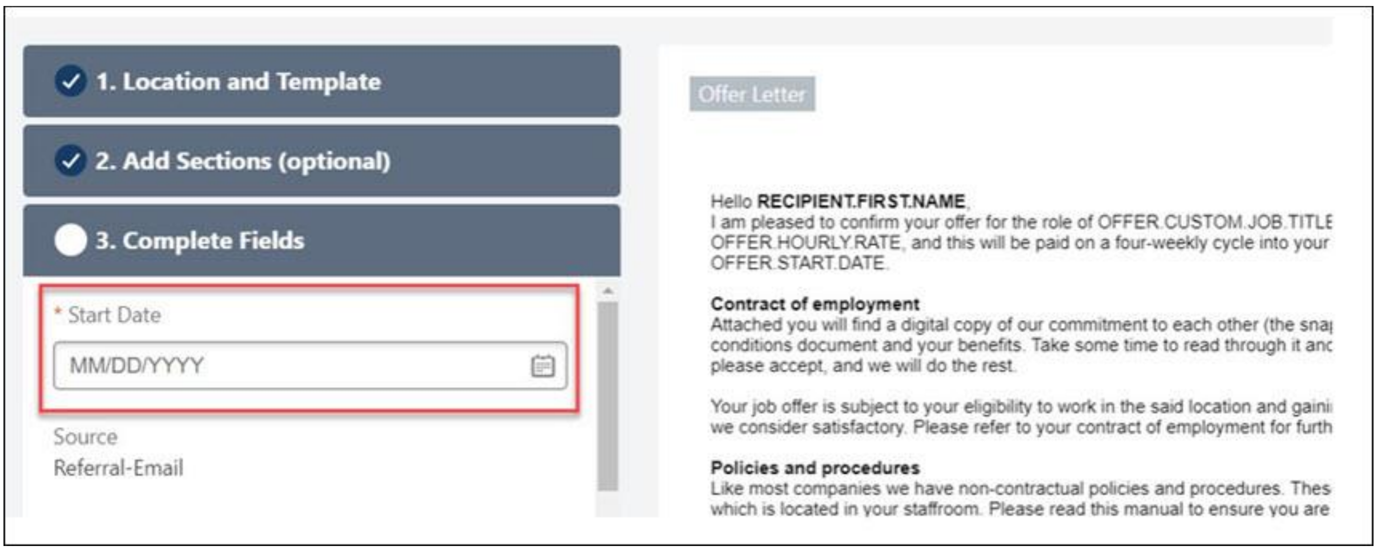
The Offer Letter Details page also display the new sub-status.

Note: Sub-statuses appear for modular and standard offer letters.

Offer Letter Start Date

When creating a new offer letter, the Start Date field no longer defaults to today's date when creating the first version of an offer letter. Recruiters must now select or enter the correct date.

This enhancement applies to modular offer letters only.



Offer Letter Template Editor

A new editor is now available for letter templates and letter sections. With this new editor, administrators can easily use HTML source code and add images to offer letters.

This enhancement applies to modular offer letters only.

Considerations

The new editor offers a much better rendering of the actual formatting of the letter. As a result, the way the offer letter templates and sections are displayed in the UI will seem different compared to the previous editor and will be much closer to the actual printed result. It is strongly recommended to review the rendering of your offer letters in your stage portal during user acceptance testing (UAT).

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Applicants: Comments - Manage	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:*** *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.*	Recruiting
Applicants: Comments - View	Grants ability to view comments for applicants.	Recruiting
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are	Recruiting

	completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	
Offer Letter Template Management - Manage	Grants ability to access and manage Offer Letter Template Management. This permission can be constrained by OU and User's OU. Creator constraints apply. This is an administrator permission.	Recruiting Administration
Offer Letter Template Management - View	Grants ability to access and view Offer Letter Template Management. This permission can be constrained by OU and User's OU. Creator constraints apply. This is an administrator permission.	Recruiting Administration
Offer: Manage Offers	Grants ability to manage all functionality available in the Offer Letter Management table of an applicant's profile, as well as view offer letters on the Documents tab of the Applicant Profile page. This permission must be used in conjunction with the *Requisition: Manage or Requisition: Owner* permission. This permission cannot be constrained. ***Note:*** *Users must also be assigned the Offer: Edit Letter Content permission in order to edit offer letters that are generated from a template.* ***Note:*** *Users must also be assigned the Offer: Select Letter Template permission to change the template that is used when generating offer letters.* • *If an offer letter template is defined at the Requisition Level[1], then users without the Offer: Select Letter*	Recruiting

[1]*Requisition level refers to the job requisition in Manage Job Requisitions. Changes made to a job requisition are referred to as being made at the "requisition level." Applicant reviewers added to a job requisition after the requisition is created are referred to as being added at the "requisition level." An offer*

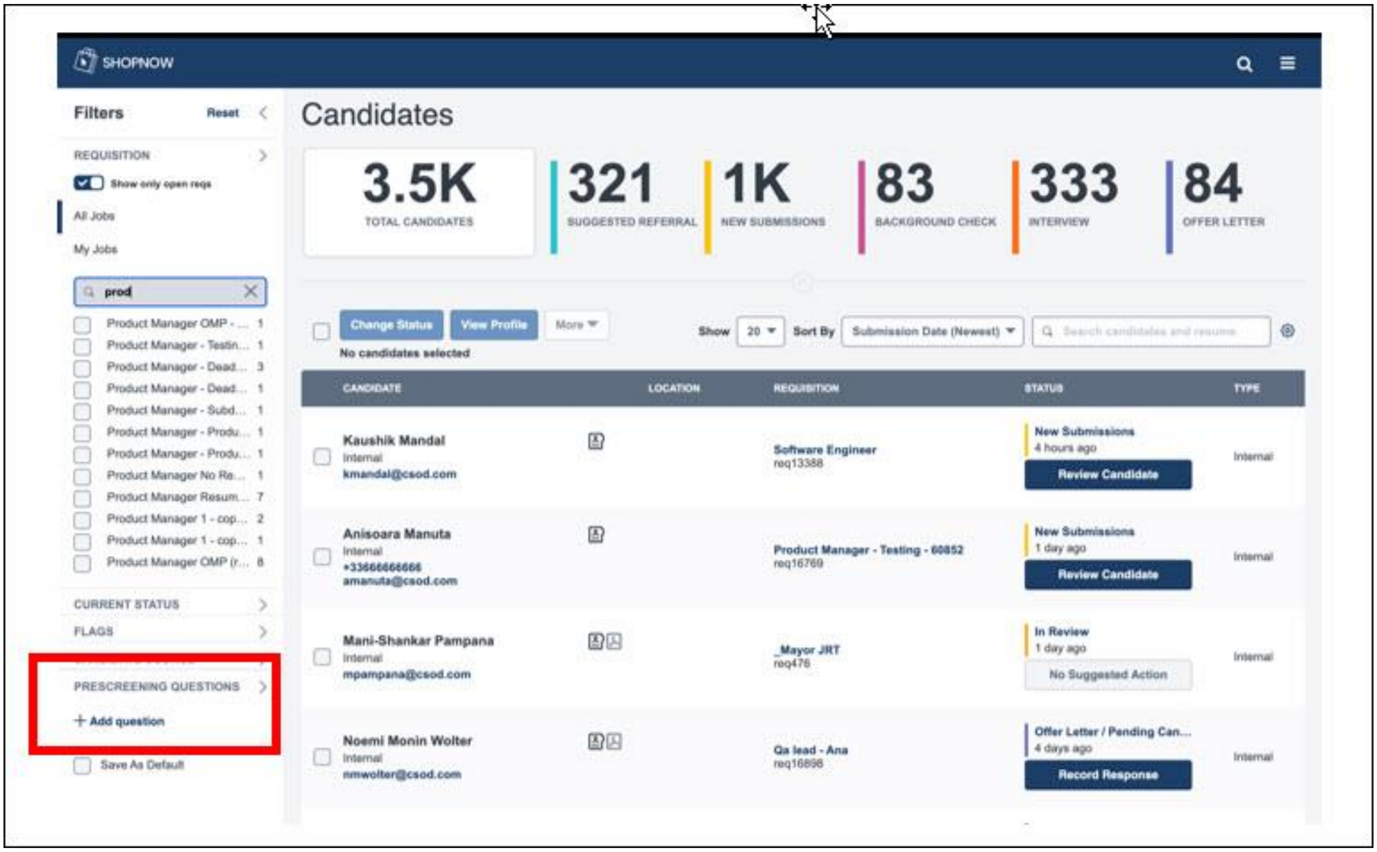
	Template permission can only use the template defined at the requisition level when configuring the offer letter at the Applicant Level[2]. • *If an offer letter template is not defined at the requisition level, then users must have the Offer: Select Letter Template permission in order to use a template at the applicant level.* ***Note:** Users must also be assigned the Applicants: Access Sensitive Statuses permission to access offer letters that are defined as sensitive.*		

letter template added to a job requisition is referred to as being added at the "requisition level." This term applies to the Recruiting functionality. This is a Recruiting term.

[2]*Applicant level refers to the applicant's profile. Changes made to an applicant's profile are referred to as being made at the "applicant level." Access granted to an applicant's profile is referred to as being granted at the "applicant level." This term applies to the Recruiting functionality. This is a Recruiting term.*

Pre-screening Questions as Filters on Manage Candidates

With this enhancement, on the Manage Candidates page, recruiters can create pre-screening questions and filter candidates based on the answers to these questions.

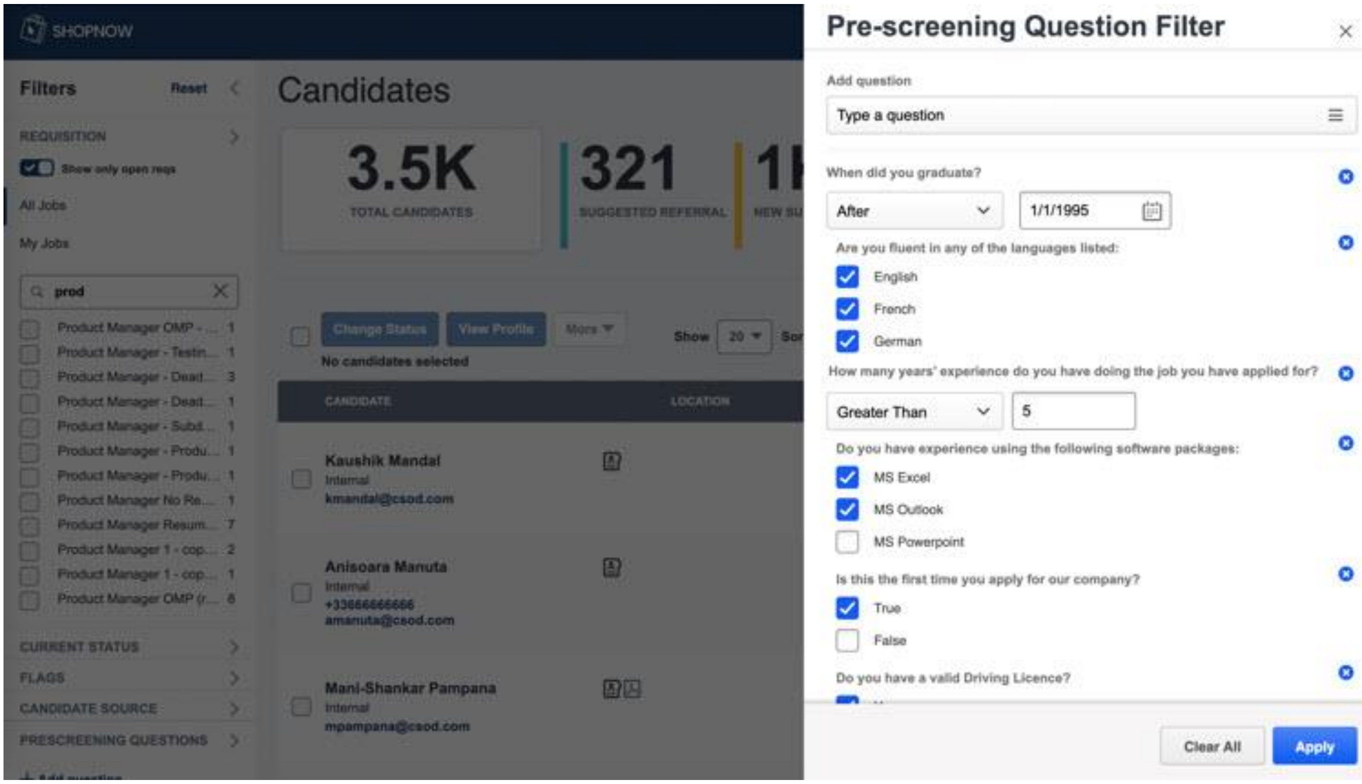


Pre-screen filtering supports the following question types:

- Multiples choices, single answer
- Multiple choice, multiple answer
- Date
- Numeric
- Yes/No
- True/False

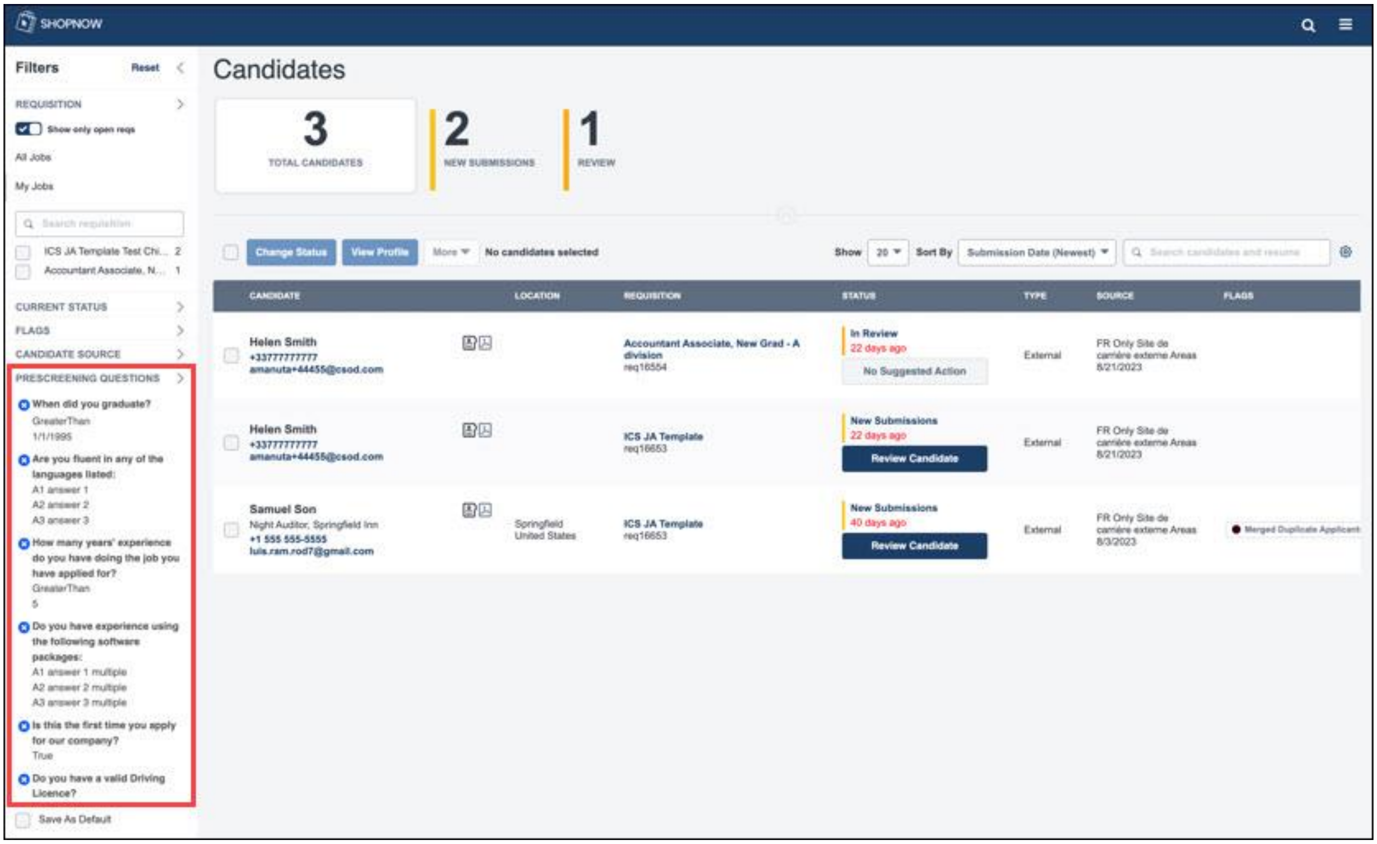
To create pre-screening question filters:

1. Go to Recruit > Manage Candidates.
2. In the Prescreening Questions section, click Add question.



3. Search for, and select pre-screening questions.
4. Provide options and answers for each question.
5. Click **APPLY**.

The Manage Candidates page refreshes and displays only candidates that match the selected pre-screening criteria. The selected questions and their options appear in the Prescreening Questions area.



Considerations

- Free-format text (Essay), Free form (short text), and Title and instructions are not supported as pre-screening filters.
- When searching for a question to add as filter, you will only be able to find questions that have been answered by the candidates that you are currently viewing on the Manage Candidate page.
- If you add several questions as filter, the candidates shown are those matching all requirements.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Applicants: Comments - Manage	Grants ability to view and manage comments for applicants.	Recruiting

	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:*** *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.*	
Applicants: Comments - View	Grants ability to view comments for applicants.	Recruiting
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Send Email from Manage Candidates and Templates Enhancements

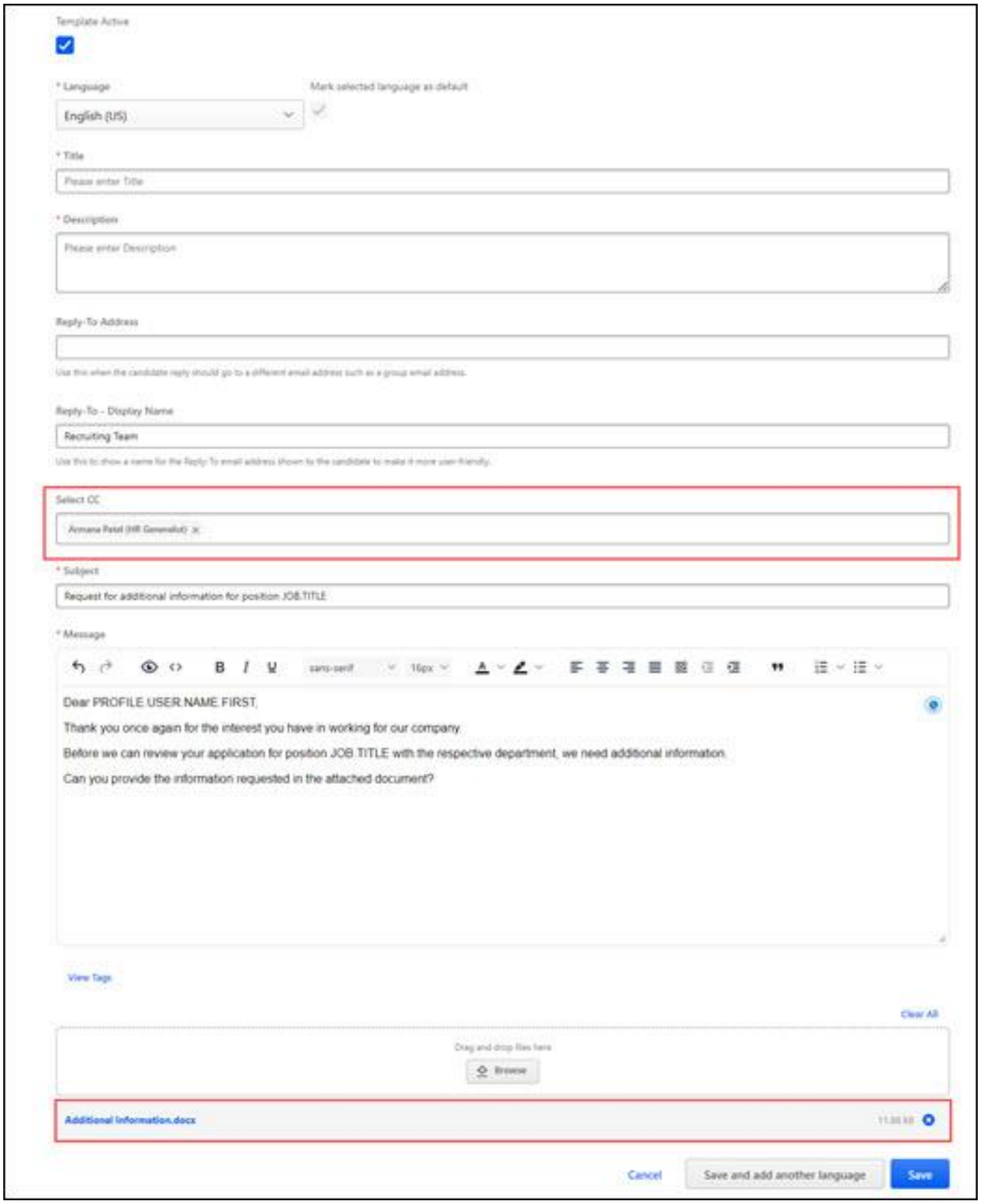
With this release, the overall Manage Candidates email and templates customer experience is enhanced as follows:

- For candidate email templates, administrators can now configure cc: addresses and add attachments to the template.
- When sending email to candidates, recruiters can now configure cc: addresses or select them from Candidate Email Template. Additionally, Recruiters can now receive attachments from candidates.

Administrators

For Candidate Email Templates, administrators can now add one or more cc: addresses and add attachments.

To access email templates, go to ADMIN > RECRUIT > EMAIL TEMPLATES.



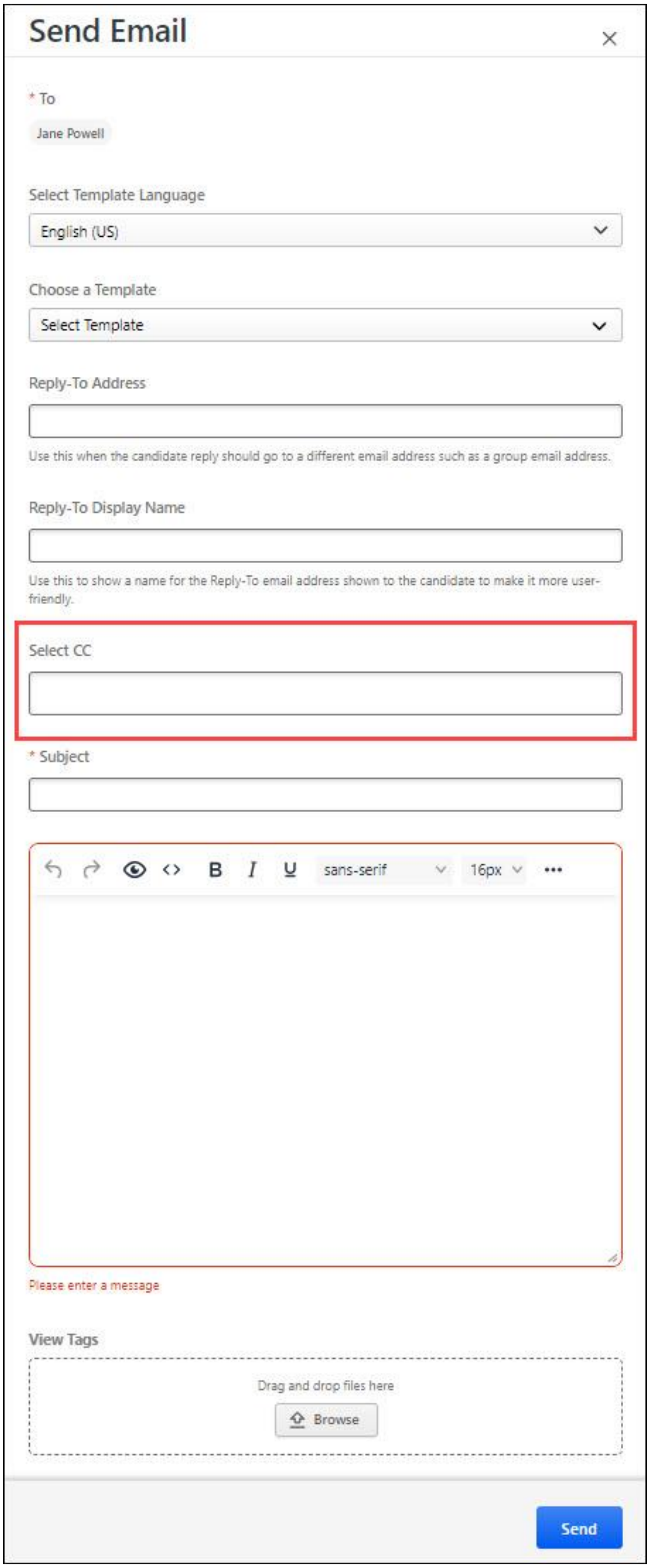
To access email templates, go to ADMIN > RECRUIT > EMAIL TEMPLATES.

- File size limit is 5 MB
- Total file size is 10 MB
- Supported file types: .arf, .avi, .bmp, .doc, .docx, .dot, .dotx, .flv, .gif, .htm, .html, .jpeg, .jpg, .m4a, .m4v, .mid, .mp3, .mp4, .mpeg, .mpg, .mpp, .pdf, .png, .pps,. ppsx,. ppt,. pptx, .rm, .swf, .txt, .vsd, .wav, .wma, .wmv, .xls, .xlsx, .zip.

Recruiters

When sending emails to candidates, recruiters can now add a cc: address or select an address from the email template. Additionally, recruiters can add pre-populated attachments from the template.

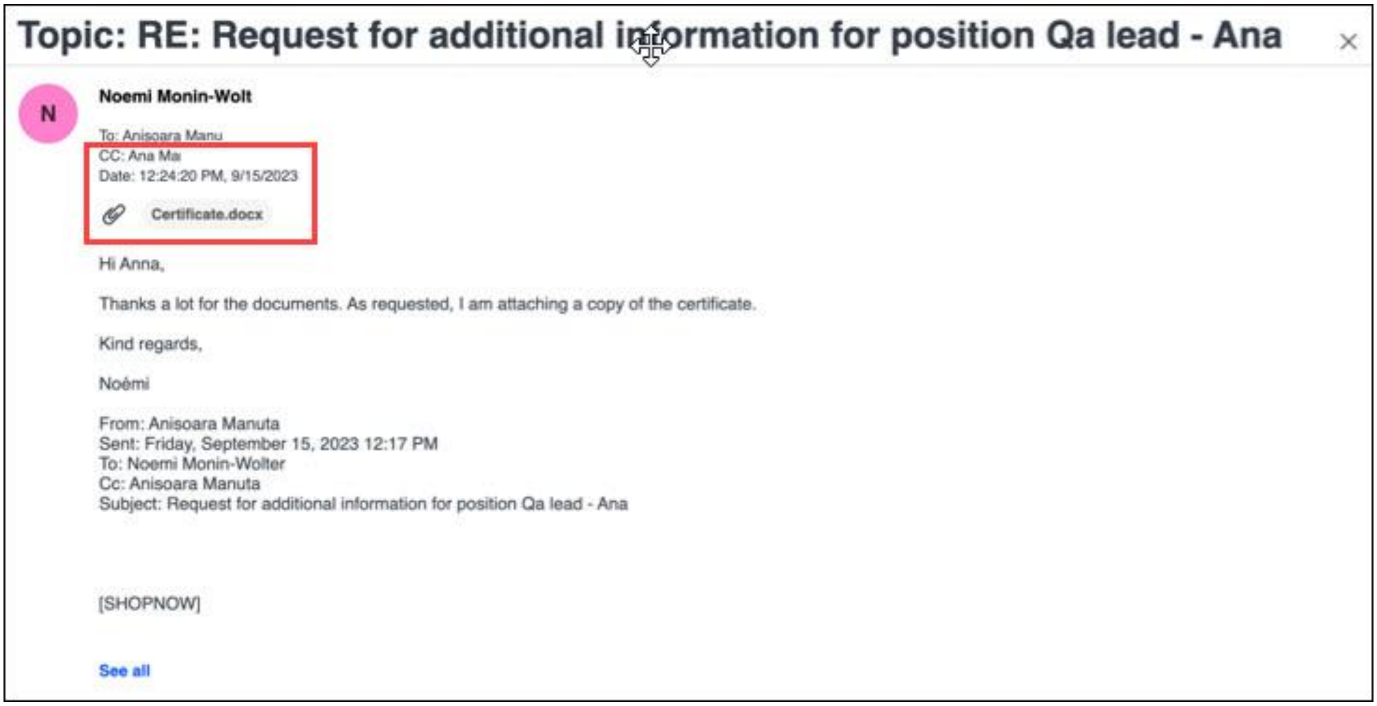
To send emails to candidates, go to RECRUIT > MANAGE CANDIDATES. Click the More drop-down and select **Send Email**



Send Email
* To
Jane Powell
Select Template Language
English (US)
Choose a Template
Select Template
Reply-To Address
Use this when the candidate reply should go to a different email address such as a group email address.
Reply-To Display Name
Use this to show a name for the Reply-To email address shown to the candidate to make it more user-friendly.
Select CC
* Subject
sans-serif
16px
Please enter a message
View Tags
Drag and drop files here
Browse
Send

When viewing candidate messages, recruiters can now see the cc: information and view and download candidate attachments.

To view candidate messages, go to RECRUIT > MANAGE CANDIDATES. Select a candidate, and then click a conversation from the Candidate Messages section.



Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Applicants: Comments - Manage	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:*** *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.*	Recruiting

Applicants: Comments - View	Grants ability to view comments for applicants.	Recruiting
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Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Recruiting - Integrations & APIs

Paradox: Interview Scheduling Integration

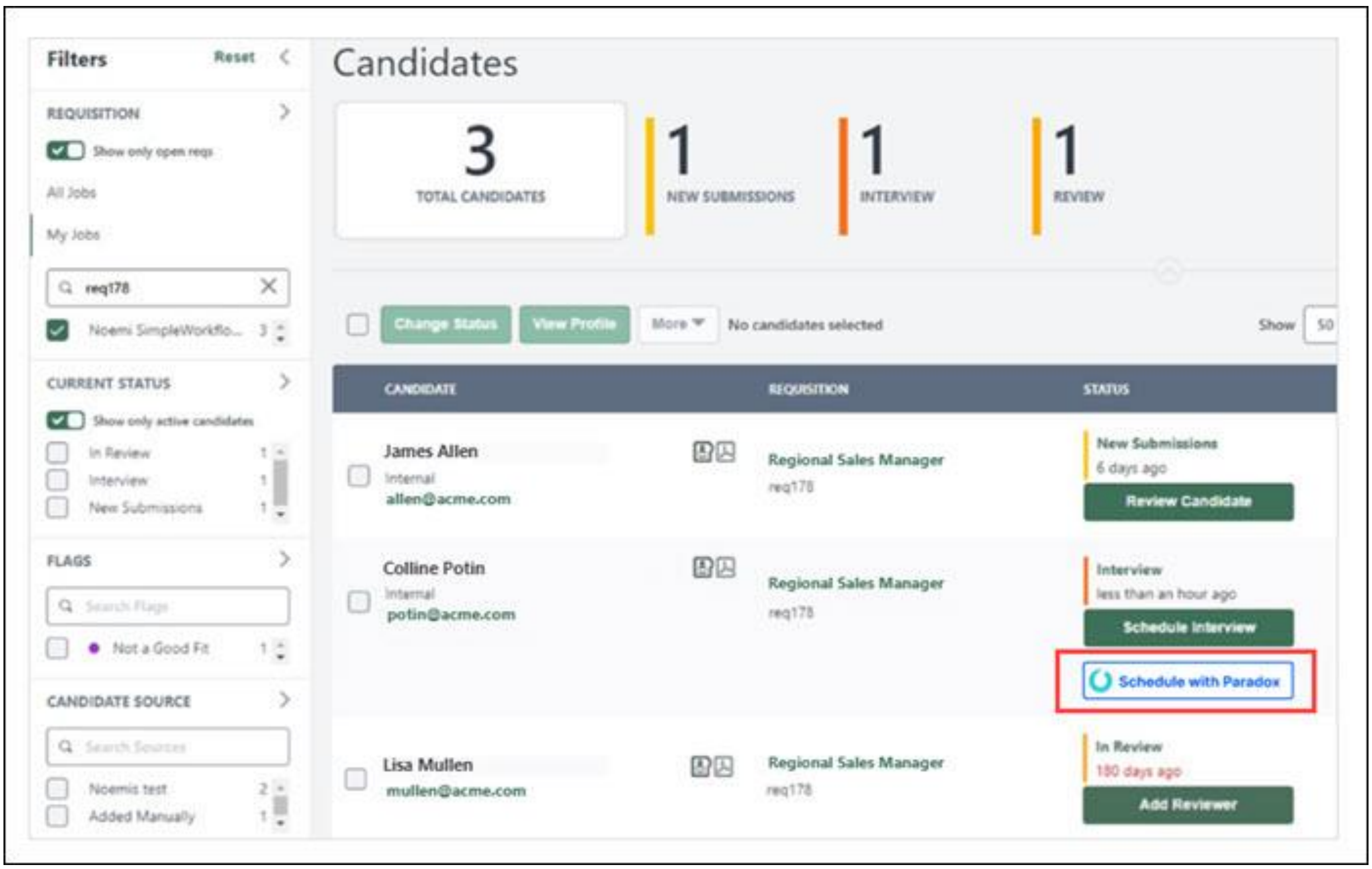
Paradox Conversational Scheduling automates every type of interview in minutes - from a simple phone screen to a multi-person, multi-location interview day - saving recruiters and hiring managers countless hours, every day.

With this release, Cornerstone integrates with Paradox to allow recruiters and candidates to schedule interviews using the calendar and virtual meeting tools of their choice.

Key Features

- Seamless integration from Cornerstone Recruiting pages towards the Paradox browser extension.
- Interview schedule returned to Cornerstone enables the recruiting feedback process.
- Benefits from Paradox
    - Recruiter defined schedule or candidate selects a time.
    - Calendar integrations/Virtual meeting integrations.
    - Multi-modal communication with candidates.
    - Schedule, reschedule, and cancel interviews.
    - Communicate with candidates through Emails + SMS or WhatsApp (defined at portal level).

Once enabled, the Paradox option appears on the Manage Candidates page:



Starter Guide

Click here to view the Paradox Interview Scheduler Integration Starter Guide.

Considerations

- Customers must have CSOD Recruiting licenses and Paradox scheduling licenses.
- Customers must be Paradox customers to use the integration.

Implementation

To enable this integration, contact Global Customer Support (GCS).

PitchYou Integration

This functionality is available with the December 1 patch.

WhatsApp is the most popular chat app in the world. Candidates need a seamless job application process in chat format that is easily accessible through mobile phones.

With this release, Cornerstone integrates with PitchYou to allow candidates a seamless job application experience using WhatsApp.

Considerations

Customers must have a PitchYou subscription.

Implementation

- To enable and configure this integration, go to the Edge Marketplace and locate the PitchYou tile. *See Marketplace - Browse Edge Integrations.*
- Customer can reach out support@pitchyou.de for additional support.

Structured Resume Details API

Customers need flexibility when processing structured resume data, for example, custom formatting a flattened application.

With this release, the new Structured Resume Details API endpoint queries on the application ID and provides structured resume data as a response. Customers can use this endpoint to fetch the parsed resume data and process it per their requirements.

The end point only fetches the candidate's structured resume data as updated at the time of submitting the application.

The following sections are provided as part of the response:

- Work Experience
- Education
- Certification

Additional Information

Click here to view the API documentaton.

Implementation

- This functionality is automatically enabled in Production and Stage as of August 29, 2023 to customers using the Cornerstone API.
- To enable the new scope, go to Home > Admin > Edge > API Management > Cornerstone API > jobapplicant:read> /rec-resume/v1/resume/job-application/{jobApplicationId}.

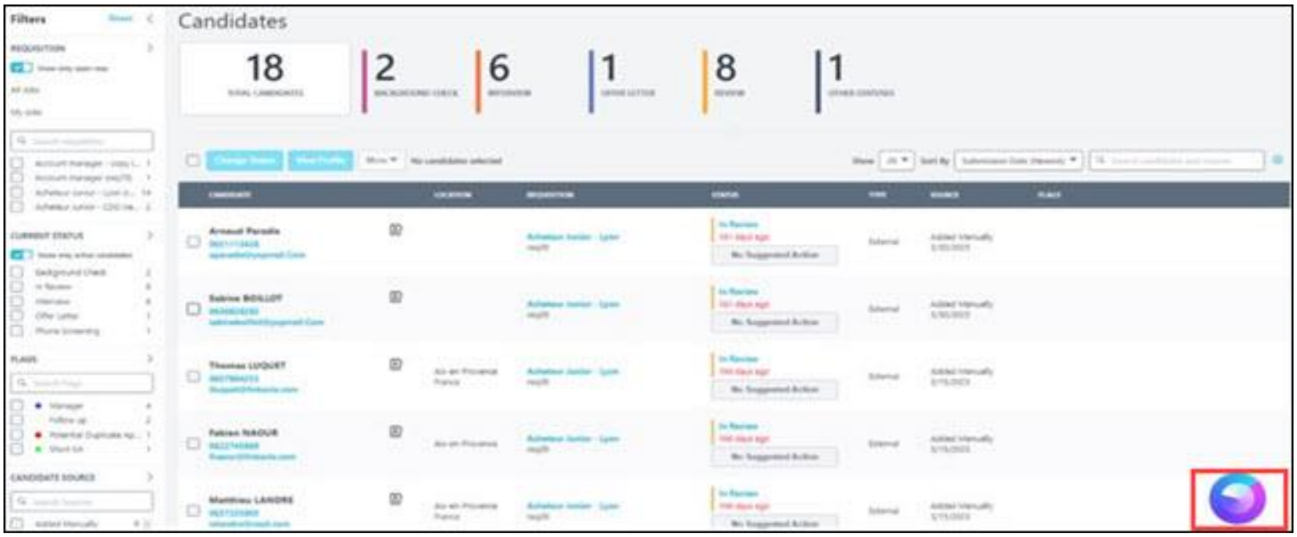
TimeKO Integration - Send Ad Hoc SMS to Candidates

This functionality is available with the December 1 patch.

TimeKO by LINKAVIE, provides best-in-class solutions to facilitate communication with candidates and employees by sending mass text messages and getting real-time categorized positive or negative answer.

With this release, Cornerstone integrates with TimeKO to provide customers an efficient ad hoc messaging and communication solution.

Once enabled, the TimeKo icon appears on the Manage Candidates page. Clicking the icon opens the extension.



Key Features

- Multi-channel communication solution for candidates and employees.
- Bulk SMS dispatch with automatic categorization of responses.
- Schedule messages to send reminders to candidates or employees.

Considerations

- Customers must use Chrome or Firefox to access ATS.
- Customers must be a TimeKO customer to use this integration.

Implementation

Contact TimeKO at contact@linkavie.com to get quotes and guidelines to integrate this solution.