- Elevate the essentials
- Dynamic and connected talent experiences
- Connected securely to the ecosystem
- Accessible and responsible partner

Cornerstone March 2024 What's New

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What's New for March 2024

What's New for March 2024

The following release resources are available within Online Help:

- **Printable Release Notes** - This topic provides a printable version of all What's New content. *See Printable What's New Guides.*
- **New and Enhanced Permissions** - This topic provides a list of all permissions that are newly added or modified with this release. *See* **New and Enhanced Permissions for March 2024** on page 10 *for additional information.*
- **Release Notes Updates** - This topic provides a complete list of all changes that have been made to the What's New content. *See* **Release Notes Updates for March 2024** on page 17 *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 Solutions

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Content Solutions Updates	Yes	No	No	Admin

Core/General Features

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Accessibility Enhancements - March 2024	Yes	No	No	All
Align Your Goals From the Cornerstone CSX App	Yes, with latest version of the Cornerstone CSX App after March 25	No	No	User
Capabilities Experience Improvements	Yes	No	No	All
Ceridian Dayforce Core Data Inbound Integration	No	Yes	Yes	Admin

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Concurrent Group Edits Guardrail	Yes	No	No	Admin
CSX and EdCast Skills Integration	No	Yes	Yes	All
Default Email Address Settings - Modification History Sorting Option	Yes	No	No	Admin
Edge Import - Deprecate Support for .XLS File Type with the November '24 Release	N/A	No	No	Admin
Edge Import - Organizational Unit (OU) Feed - Usability Enhancement	Yes, when using Edge Import	Yes	No	Admin
Edge Import - New Performance Load Type (Reviews Score Load)	Yes, when using Edge Import	Yes	No	Admin
Edge Import Learning Loads - Additional Loads Support Feeds and Bulk API	Yes, when using Edge Import. Bulk APIs are only available when enabled.	Yes	No	Admin
Edge Import Learning Loads - New Optional Fields	Yes, when using Edge Import	No	No	Admin
Edge Import Learning Loads - Usability Enhancements	Yes, when using Edge Import	Yes	No	Admin
Enhanced Skills Profile	Yes	No	No	User
Filter "Manage Group" Table To View Drafts	Yes, when the Group Preview and Save Draft functionality is enabled	No	No	Admin
Group Preview (General Availability)	No, it must be enabled via Group Preferences	Yes	No	Admin
Language Pack Updates - March 2024	Yes	No	No	All

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Multi-Factor Authentication (Early Adopter)	No, it must be enabled via Feature Activation Preferences	Yes	No	All
Observation Checklists in Cornerstone CSX App	Yes, with latest version of the Cornerstone CSX App after March 25	No	No	User
Overwrite Settings Guardrail	Yes	No	No	Admin
People Matrix - Critical Skills Team Matrix	Yes	No	No	Manager
People Matrix - Required Employees on Target	Yes	No	No	Manager
People Matrix - Usability Enhancements	Yes	Yes	No	All
Reporting API - Underlying Code Libraries Upgraded	Yes	No	No	Admin
Reporting Fields - Capabilities	Yes	No	No	Admin
Reporting Fields - Position Management	Yes, when Position Management is enabled. Position Management requires an implementation project to enable. To enable this functionality, contact Global Customer Support.	No	No	Admin
Reporting 2.0 - Accessibility Enhancements	Yes	No	No	Admin
Reporting 2.0 - Disable Auto-Refresh for Viewer Page	Yes	No	No	Admin
Reporting 2.0 - Refresh Actions Disabled When Refresh In Progress	Yes	No	No	Admin

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Reporting 2.0 - Select Training Modal - Enhanced Search	Yes	No	No	Admin
Reporting 2.0 New Fields - March 2024	Yes	No	No	Admin
RTDW Updates to OData v4.0 Delta Objects	Yes	Yes	No	Developer
RTDW Updates to Reporting API, RDW, Data Exporter and Data Exporter API	Yes	Yes	No	Admin
Security Permission To Bypass Required Group Preview	Yes	Yes	No	Admin
Self Registration - Ability to Add Multiple Approvers	Yes	Yes	No	Admin
Skill Proficiency Experience Improvements	Yes	No	No	All
SOAP Transcript API (LOWS.asmx) will be Deprecated with the November '24 Release	N/A	N/A	N/A	Developer
Third-Party Cookies Access Deprecation in Google Chrome and Firefox Browsers	N/A	N/A	N/A	All
User Record Custom Field Default Value	Yes	No	No	Admin

Cornerstone HR Features

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Form Management - Refresh Option	Yes	No		

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Position Management - Overview and General Availability Announcement	No	Yes	Yes	
Position Management - Custom Fields	No	Yes	Yes	
Position Management - Capabilities	No	Yes	Yes	
Position Management - Custom OU Types	No	Yes	Yes	
Position Management - Edge Import Enhancements	No	Yes	Yes	

Learning Features

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Ability to Assign Training Beyond Managers (Early Adopter)	No, needs activation through Feature Activation Preferences	Yes	No	All
Accessing Versioned Training in Certifications	Yes	No	No	End User
Allow Session Completions to be Credited Toward Curricula	Yes	No	No	End User
Bulk Publish Online Courses From Content Uploader	Yes	No	No	Admin
Content Skills Tagging - Portal Retagging	Yes	No	No	Admin
Curricula Administration Search to Enhanced Search	Yes	No	No	Admin
Curriculum Player 2.0 (Early Adopter)	No, needs activation by selecting "Curriculum Player 2.0" radio button on the General tab when editing a curriculum	Yes	No	End User
Deprecation of (Legacy) Course Publisher with the July '24 Release	N/A	N/A	N/A	Admin
Do Not Show Inactive Trainings on Learner Home	Yes	No	No	End User

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Download Online Course Publication Files From Course Console	No, needs activation through Global Customer Support	No	Yes	Admin
Edit Skills UI for Individual Learning Objects	Yes	No	No	Admin
Email Optimizations for Versioning Performance Improvement	Yes	No	No	Admin
Enhancements to Ability to Revert ILT Sessions inside Curricula (Early Adopter)	Yes, only in Stage. Needs activation in Pilot and Production through Feature Activation Preferences	Yes	No	Admin
"Failed" Status for Online Content	No, Needs activation through Global Customer Support	No	Yes	All
Global Search (Training) - Deprecation of Traditional Search with the November 2024 Release	N/A	N/A	N/A	All
Hiding Legacy Skills on Bulk Edit and Refine Search	N/A	N/A	N/A	Admin
Inactive User Handling on Inbox Widget and Test Grader Page	Yes	No	No	Grader
Learner Home - Skills Carousels	No, needs activation through Learner Home Preferences	Yes	No	End User
Learning Administration New UIs Auto Enabled and Legacy UIs Deprecated with the July '24 Release	Yes	No	No	Admin
Learning Search Skills Filter - View All Skills	Yes	No	No	End User
Legacy "Transcript And Task" APIs - Optional Constraints	Yes, but optional	No	No	Developer
LinkedIn Learning Integration - Course Filtering Based on Language	No, needs activation through Global Customer Support	No	Yes	All
Material Versioning - Resubmit After Versioning Flow Failure	Yes	No	No	Admin

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Microsoft Teams vILT Integration Enhancements	Yes	No	No	Instructor
New "SF-182 Add Approver" Permission	Yes	No	No	Manager
"One Player" Inline Experience for Standalone Trainings (Open Beta)	No, needs activation through Feature Activation Preferences	Yes	No	Admin
Reporting Fields - Learning	Yes	No	No	Admin
Required Training Tagging (Early Adopter)	No, needs activation through Feature Activation Preferences	Yes	No	Admin
Shopping Cart Enhancements (Open Beta)	No, needs activation through Feature Activation Preferences	Yes	No	Admin
Skills Quick Start Wizard - Content Skills Tagging Added	Yes	No	No	Admin
SOAP Transcript API (LOWS.asmx) will be Deprecated with the November '24 Release	N/A	N/A	N/A	Developer
Sorting Options in Learning Assignment Tool Search Training Modal	Yes	No	No	Admin
Stop Auto-Populating Search Results in Administrative Search - General Availability	No, needs activation through Feature Activation Preferences	Yes	No	Admin
Stripe Tax - Standalone Feature for Any Payment Gateway	No, needs to contact Account Manager	Yes	No	Admin
Transcript API Enhancements	No, needs self-activation	Yes	No	Developer
Version Equivalence Alignment - Materials and Online Course Feature (Early Adopter)	No, needs activation through Feature Activation Preferences	Yes	No	Admin

Performance Features

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Check-Ins Outlook Calendar Invite Enhancements	Yes	No	No	
Check-Ins Share With Me Enhancements	Yes	No	No	
Check-Ins Usability Enhancements	Yes	No	No	
Improved "Contact Administrator" Email in Compensation	Yes	No	No	
Goals Redesign (Open Beta)	Yes	No	No	
Equal Weighted Average Rating for Goals and Competencies in Review Tasks	Yes	No	No	
Performance Reviews – Update Missing Reviewers	Yes	No	No	
Reporting Fields - Check-Ins	Yes	No	No	Admin

Recruiting Features

FEATURE	ON BY DEFAULT?	ADMIN SETUP REQUIRED	SUPPORT TICKET REQUIRED	AFFECTED AUDIENCE
Manage Candidates Usability Enhancements	Yes	No	No	
Unified Experience for the Hiring Team on Manage Candidates	Yes	No	No	
Email on Manage Candidates – Requisition and Application Custom Fields	Yes	No	No	
Interview Scheduler Enhancements to the Paradox Integration	Edge Import	Yes	No	
Comments on Requisitions (Early Adopter)	Yes	No	No	
Deprecation of Data Load Wizard (DLW) Requisition Template Load with the November '24 Release	N/A	N/A	N/A	
Manage Applicants Deprecation with the March '24 Release	N/A	N/A	N/A	
Reopen Closed/Cancelled Requisitions	Yes	No	No	
Reporting Fields - Recruiting	Yes	No	No	Admin
Share on LinkedIn from Internal Career Site	Yes	No	No	

New and Enhanced Permissions for March 2024

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 Bulk API - LMS - Event Transcript Update	Grants ability to use the Bulk API to load event transcript update data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - ILT Instructors	Grants ability to use the Bulk API to load ILT instructor data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Subjects	Grants ability to use the Bulk API to load subject data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access LMS - Event Transcript Update Feed	Grants access to the Event Transcript Update data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - ILT Instructors Feed	Grants access to the ILT Instructors data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Subjects Feed	Grants access to the Subjects data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Bypass Required Group Preview	When the Group Preview functionality is enabled and the **Require Preview Before Saving Edits** toggle is enabled in Group Preferences, administrators with this permission can save edits to a Group or publish a draft without generating a preview. Administrators with this permission still have the option to generate a preview. This permission cannot be constrained. This is an administrator permission.	Core Administration
Core Features Activation	Grants ability to manage Core Feature Activation Preferences in which administrators can enable and disable certain features. This permission cannot be constrained. This is an administrator permission.	Core Administration
Edge Import - Load Review Scores	Grants access to upload or override the rating score for reviewees via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Import Learning - Modify Training ID	Grants the ability to modify the "Training ID" 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
MFA - Admin - User Device - Manage	Grants the ability to manage the user device information for Multi-factor Authentication. This permission works 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

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
People Matrix - Manage Preferences	This grants the ability to manage the People Matrix Settings. This permission cannot be constrained. This is an administrator permission.	Core Administration

Position Management

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Company Chart - View	Grants users the ability to access the Position Management Company Chart. This permission cannot be constrained.	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: Jobs - View	Grants users the ability to view 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: 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 CorporationUser's Standard OUs,	Position Management

	Custom OUs, Positions, Jobs, Functions, and UserStandard OUs.	
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: 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
Position Management - Manage	Grants users the ability to access Position Management. This permission cannot be constrained.	Position Management
Positions: Position - Add	Grants users the ability to add positions. This permission cannot be constrained.	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: Positions - View	Grants users the ability to view 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

Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Send email from Manage Candidates	Grants the ability to send emails to all candidates the user has access to from Manage Candidates. This permission cannot be constrained.	Recruiting

Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Activate Required Training Requirements Preferences	Grants ability to activate Required Training Requirements by organizational unit. This permission can be constrained by OU and User. When activated, these reasons are available to administrators when assigning training from Learning Assignment Tool (LAT).	Learning - Administration
Assignment Tool - Edit Required Training TAG and reason	Grants the administrator the ability to edit the Required Training reason and TAG of dynamic learning assignments via the Assignment Summary page for the assignment. This permission can be constrained by OU and User's OU.	Learning - Administration
Assign Training with Constraints	This permission grants any Role, User, or Organizational Unit (standard and custom, including groups) the ability to assign training to other users. This permission, along with its constraints, seamlessly integrates with the existing Assign Training permission. Users with either the new permission or both will be redirected to a new interface and will use the constraints associated with the Assign Training with Constraints permission. This permission can be constrained by the following: • User's direct subordinates • User's subordinates • User's Organizational Unit - Standard and Custom • Organizational Units (including Groups) - Standard and Custom • Provider • Training Type • Training Item (specific training) • Restrict to Employee Relationship Multiple constraints on the permission between User/OU and LO are treated as AND constraints, whereas constraints between User/OU are treated as OR constraints.	Learning - Administration
Online Class - Download Files	Grants access to the download option in Course Console for administrators to download Online Class zip files.	Learning - Administration
Remove Required Training	Grants ability to remove required trainings if user has another training removal permission. This permission can be constrained by OU, User's OU, User's Corporation, User Self	Learning

	and Subordinates, User's Self, User's Direct Subordinates, and User. This is an administrator permission.	
Required Training Requirements Manage	Grants ability to add and edit/update Requirements, which can then be made to appear or not appear at the organizational unit level to administrators when setting up Required Training Learning Assignments. This is an administrator permission.	Learning - Administration
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
SF-182 Add Approver	Allows users to view and click on the +Add Approver on the SF-182 Training details page. This permission can be constrained by OU, User's OU, and User Self. This is an end user permission.	Learning - Administration

Release Notes Updates for March 2024

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

Changes made on 05 April 2024:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Learning	Reporting 2.0 - Null Value Support for Training Custom Fields	Added a new topic with a use case to further clarify the change.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Performance Reviews – Update Missing Reviewers	Performance Reviews – Update Missing Reviewers	Updated the "With this enhancement..." paragraph.

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 the updated Manage Applicants Deprecation Guide.

Changes made on 26 March 2024:

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Curriculum Player 2.0 (Early Adopter)	Curriculum Player 2.0 (Early Adopter)	The Feature Activation settings will be available with the April 5 patch, not the March 26 hotfix.

Changes made on 22 March 2024:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Enhanced Skills Profile	Skills Profile Page	During the Rate at least five of your skills step in the Complete Your Profile widget, when you select the **Rate my skills** link, you will see actions based on your organization's configuration. For example, you may see Rate My Interest or Rate My Proficiency.
Multi Factor Authentication (Early Adopter)	Multi Factor Authentication (Early Adopter)	When adding new OUs in the MFA Configuration page, all previously selected OUs needs to be re-selected,

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	MFA (Multi-factor Authentication) Configuration	otherwise they will be removed from the list. This will be improved with the July release.
Reporting 2.0 - Disable Auto-Refresh for Viewer Page	Reporting 2.0 - Disable Auto-Refresh for Viewer Page	Added the Report Viewer Properties image.
Self Registration - Ability to Add Multiple Approvers	Self Registration - Ability to Add Multiple Approvers	Administrators can select static or dynamic groups, but Cornerstone recommends using static groups to ensure the correct users are included.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ability to Assign Training Beyond Managers (Early Adopter)	Ability to Assign Training Beyond Managers (Early Adopter)	Corrected the FAQ "How is Transcript history updated when training is assigned, reassigned or a newer version of training is assigned?". Updated the Assign Training with Constraints permission description to remove this note because it does not apply to Production. ***Note:** The constraint for "User's direct subordinates" is currently not populating users in the new assign training workflow. We expect this constraint to become functional within 7-10 business days from the release.*
Curriculum Player 2.0 (Early Adopter)	Curriculum Player 2.0 (Early Adopter)	Updated the Implementation information with the new setting in Feature Activation Preferences.
Material Versioning - Resubmit After Versioning Flow Failure	Material Versioning - Resubmit After Versioning Flow Failure	Added new topic.
Microsoft Teams vILT Integration Enhancements	Support for Extended Options	Added Attendance Calculation as an extended option.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Candidate Skills Match Enhancements (EA)	Candidate Skills Match Enhancements (EA)	Added the following to the Considerations section: Matching Score filter will NOT be visible to customers who have Candidate skills match prior to the January 12th patch. The matching score is still calculated, but the filter won't be visible. To view matching score filter, impacted customers can disable and then re enable the candidate skills match feature by going to ADMIN > RECRUIT > FEATURE ACTIVATION. Reenablement will NOT impact their existing score data.

Changes made on 15 March 2024:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Accessibility Enhancements - March 2024	Accessibility Enhancements - March 2024	Removed: This functionality is not available during UAT. This functionality is available during UAT.
Edge Import – Deprecate Support for .XLS File Type with the November '24 Release	Edge Import – Deprecate Support for .XLS File Type with the November '24 Release	Added new topic.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Microsoft Teams vILT Integration Enhancements	Microsoft Teams vILT Integration Enhancements	The latest Microsoft Teams vILT Integration Guide is available now.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Candidates Usability Enhancements	Manage Candidates Usability Enhancements	Added the following: **Note:** Only users with appropriate permissions can use the Change Status option. If you do not have the appropriate permission, an error message appears.

Changes made on 8 March 2024:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Default Email Address Settings - Modification History Sorting Option	Default Email Address Settings - Modification History Sorting Option	Updated the screenshot to reflect the table when a responsive theme is used in the portal.
Edge Import - New Performance Load Type (Reviews Score Load)	Edge Import - New Performance Load Type (Reviews Score Load)	Added the following note: This load type is not yet activated in Stage portals. It is expected to be available with the UAT 3 Stage deployment.
Edge Import - Organizational Unit (OU) Feed - Usability Enhancement	Edge Import - Organizational Unit (OU) Feed - Usability Enhancement	This is a new item.
Multi Factor Authentication (Early Adopter)	Multi Factor Authentication (Early Adopter) MFA (Multi-factor Authentication) Configuration Feature Activation Preferences - Activate Multi-Factor Authentication (MFA)	MFA is now ready for testing as of February 29.
Reporting API - Underlying Code Libraries Upgraded	Reporting API - Underlying Code Libraries Upgraded	This is a new item.
Third-Party Cookies Access Deprecation in Google Chrome and Firefox Browsers	Third-Party Cookies Access Deprecation in Google Chrome and Firefox Browsers	This is a new item.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ability to Assign Training Beyond Managers	Ability to Assign Training Beyond Managers (Early Adopter)	The new Assign Training UI is available to anyone with the new Assign Training with Constraints permission when assigning training from Learner Home, Learning Search, and Learning Details.
Edit Skills UI for Individual Learning Objects	Edit Skills UI for Individual Learning Objects	This functionality is available for testing as of February 29.
Email Optimizations for Versioning	Email Optimizations for	Customers with heavy email usage in terms of custom emails will see improved performance during versioning.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Performance Improvement	Versioning Performance Improvement	

Changes made on 1 March 2024:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Check-Ins	Reporting Fields - Check-Ins	Updated the Check-In Has Content field name to Check-In Note Has Content.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Sorting Options in Learning Assignment Tool Search Training Modal	Sorting Options in Learning Assignment Tool Search Training Modal	The **Enable Enhanced Search on Select Training** setting must be toggled on in Assignment Tool Preferences to see the sorting options.

Changes made on 27 February 2024:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting 2.0 - Refresh Actions Disabled When Refresh In Progress	Reporting 2.0 - Refresh Actions Disabled When Refresh In Progress	Corrected the action names that are disabled when a report query is in progress.
Reporting Fields - Check-Ins	Reporting Fields - Check-Ins	Updated field names from Check-Ins to Check-In. Also, added two values for Check-In Creator and Check-In Follow-up Assignee.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edit Skills UI for Individual Learning Objects	Edit Skills UI for Individual Learning Objects	Added the following note:

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		This functionality is not available for testing at the start of UAT; it is targeted to be ready for testing with the UAT 2 deployment to stage portals.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Applicants Deprecation with the March '24 Release	Edit Skills UI for Individual Learning Objects	Added an item under "2024" and added a note.
Share on LinkedIn from Internal Career Site	Share on LinkedIn from Internal Career Site	Updated topic to include that the Share on LinkedIn button on the internal career site page is visible when configured for an internal career site and the job is also posted on an external career site.

Changes made on 23 February 2024:

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Enhanced Skills Profile	Skills Profile Page	Clarified the behavior of the Critical skills widget when the critical skill does not have a target.
Multi Factor Authentication (Early Adopter)	Multi Factor Authentication (Early Adopter) MFA (Multi-factor Authentication) Configuration Feature Activation Preferences - Activate Multi-Factor Authentication (MFA)	Added the following note: MFA is not ready to test at the start of UAT. Customers are encouraged to not activate this feature at the start of UAT; it is targeted to be ready for testing with the UAT 2 deployment to stage portals.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ability to Assign Training Beyond Managers	Ability to Assign Training Beyond Managers (Early Adopter)	Updated the Assign Training with Constraints permission.
Version Equivalence Alignment - Materials and Online Course Feature (Early Adopter)	Version Equivalence Alignment Use Cases	Corrected the Use Case 2 end result.

Content Solutions Updates

Beginning in 2024, our Content products including Content Studios, and Create Tool will be aligned with our High-Growth Release program. New enhancements to these tools will be released every 6 weeks. Content Anytime refreshes will continue monthly updates. Information on these dates can be found in our **2024 Content Refresh & Content Solutions Calendar**.

The **Content Solutions 2024 Release Resources Playlist** contains up to date information for all Content Solutions releases: Calendar, Matrix, First Looks, On-Demand Webinars and more. Follow the playlist and the **Content Solutions Updates** topic to stay on top of the latest release announcements and get notified as soon as new resources become available.

Information on the March '24 release will be available on February 26th.

Content Solutions Recent/Upcoming Highlights:

- Content Subscriptions: New AI-related courses from Madecraft (Feb '24)
- Content Subscriptions: New Providers: Cellmates, FutureHuman (Feb '24)
- Content Subscriptions: Skill Pill series on DEI (Feb '24)
- Create Tool: Share content on the web without needing to access LMS (March '24)

Core/General

Capabilities Enhancements

Capabilities Experience Improvements

With this enhancement, the following improvements are made to the Capabilities experience based on customer feedback:

- Include neighboring skills in Skills Profile suggestions
- Hide Recommendations only for suggested skills
- Remove the User option from the Capability Models organizational unit selector
- Require administrators to select an organizational unit and a skill for Capability Models
- Clarify proficiency target options in Capability Models
- Rename Learning Recommendations in Skill Details toggle in Capability Preferences

Include neighboring skills in Skills Profile suggestions

Previously, skills were suggested to users based only on their profile data and learning completions. When a user accepted or rejected all suggested skills, it was possible that no additional skills were suggested to the user in the Skills You Might Have section of the Skills Profile.

With this release, skill suggestions are provided based on the skills the user has declared. For example, if a user indicates they have the agile project management skill, the Skills Profile may suggest agile methodologies, scrum, and software project management as skills the user might have.

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

Hide Recommendations only for suggested skills

Previously, the Hide Recommendations option was available for skills in the Skills You Want to Develop, Your Skills, and Skills You Might Have sections of the Skills Profile.

With this release, the Hide Recommendations option is removed from skills in the Skills You Want to Develop and Your Skills sections. This option is now only available for skills in the Skills You Might Have section.

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

Remove the User option from the Capability Models organizational unit selector

Due to a system limitation, the User organizational unit (OU) type was removed from the **Select Your Audience** OU selector when creating a Capability Model. Administrators who want to associate specific users with a Capability Model can do so with the Groups OU type.

Existing models where administrators have configured the audience using Users are unaffected by this change. In such models, when the OU selector is opened, the flyout will not display the selected user data.

To create a Capability Model, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > CAPABILITY MODELS LIBRARY. Then, select the **CREATE** button.
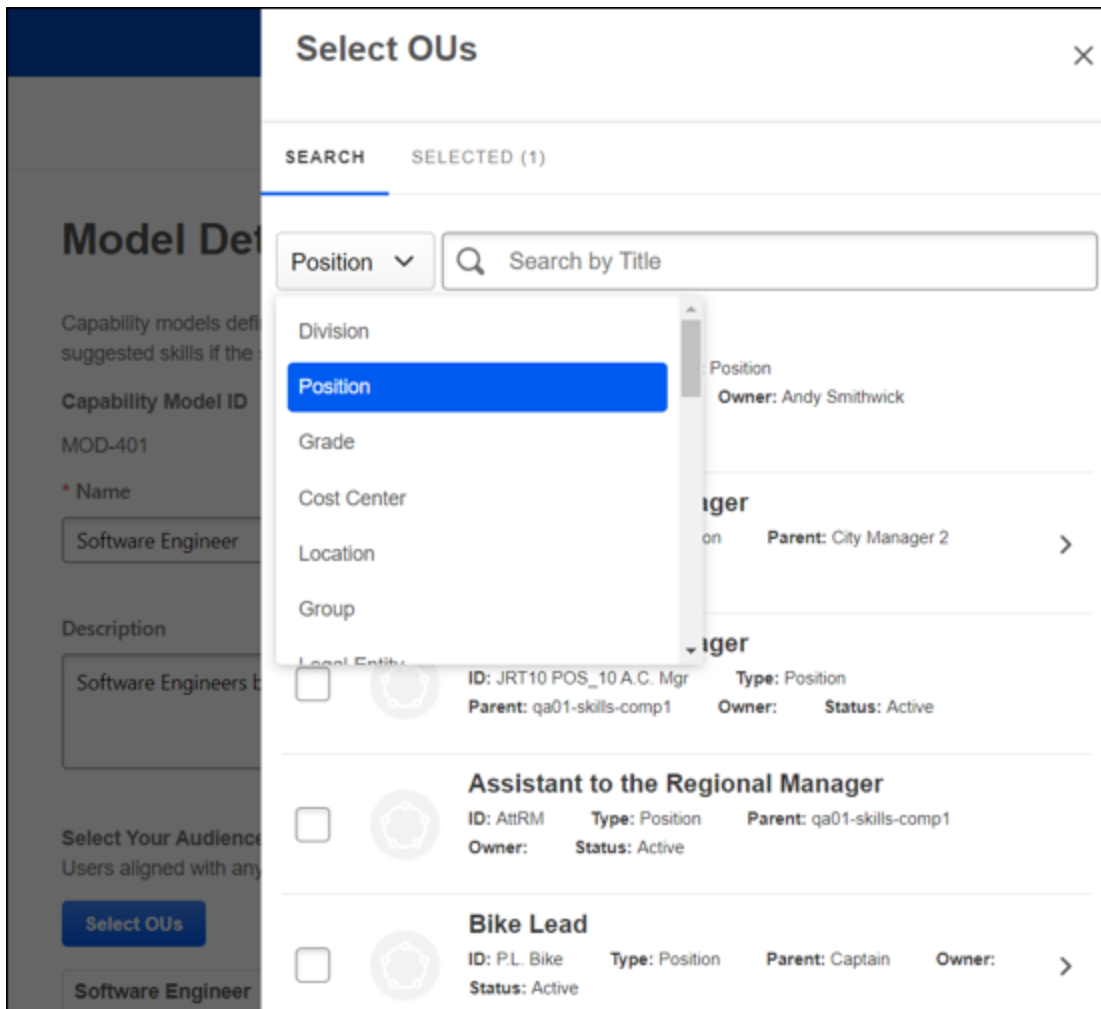
Require administrators to select an organizational unit and a skill for Capability Models

When creating a Capability Model, administrators are required to select an OU and a skill before defining Capability Targets.

If the administrator has not selected at least one OU and skill, the Define Capability Targets toggle on the Capability Targets tab is disabled, and targets cannot be defined.

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

Clarify proficiency target options in Capability Models

Previously, when defining capability targets for a Capability Model, the text describing the options did not clearly indicate the outcome of each choice.

With this release, the following option labels are updated to explain the outcome of each choice more clearly.

- Set the same targets for all selected OUs
- Set different targets for selected OUs

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

Rename Learning Recommendations in Skill Details toggle in Capability Preferences

In the Capability Preferences > Skills Profile page, the Learning Recommendations in Skill Details toggle is renamed to **Show Related Learning in Skill Details**. This makes the toggle name clearer for administrators.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

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

	permission cannot be constrained. This is an administrator permission.	
Capabilities - Skills Profile - View	Grants the ability to view an employee's 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

Enhanced Skills Profile

Enhanced Skills Profile - Overview

With this enhancement, the Skills Profile is enhanced with a new user experience that includes an updated look and new widgets. This enhancement increases usability and adoption by presenting critical information at a glance and shifting the focus from a simple list of skills to an actionable view of the most important development activities.

The Enhanced Skills Profile includes the following features:

- Simpler profile creation onboarding experience with more guidance
- A new manager view that facilitates simplified skill coaching and monitoring
- New Critical Skills and Your Skills Proficiency pie charts that provide an at-a-glance view of skill progression

Frequently Asked Questions (FAQs)

What happens if critical skills are not enabled for an employee?

The Critical skills widget does not display on the Skills Profile.

What happens if a user completes the three steps to populate their Skills Profile and they do not have critical skills enabled?

The Complete your profile and Critical skills widgets do not display on the Skills Profile. The Your skills proficiency and Skills you're developing widgets display at the top of the page.

Are these enhancements applicable to the manager view as well?

Yes, the Enhanced Skills Profile is available for self and manager view.

Is there any change in the critical skills view?

No, critical skills view is integrated with the critical skills donut chart with sorting options, progress tracking, and the total number of skills in each status.

Implementation

This functionality is automatically enabled for all organizations. The Critical Skills widget is visible when Critical Skills are enabled for employees.

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's 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

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
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 Page

The Skills Profile page is updated with the following changes:

- Critical Skills - This new widget replaces the Your Critical Skills section. This widget shows the user's critical skills and their current status. Users can select the **View critical skills** link to access the Critical skills page. *See* **Skills Profile - Critical Skills** on page 37 *for additional information.*
- Your skill proficiency - This new widget displays a graphical representation of the user's declared skills and their proficiency level.
- Complete your profile - This new widget visually displays the completeness of a user's skill profile and encourages them based on incomplete areas. Users can select the **Add skills** link to open the Manage Skills pop-up, in which users can add skills to their profile.
- Skills you're developing - The Skills You Want to Develop section is renamed Skills you're developing. When managers view a subordinate's page, the section name is Skills they're developing. The functionality is unchanged.
- Your declared skills - The Your Skills section is renamed Your declared skills. When managers view a subordinate's page, the section name is Their declared skills. The functionality is unchanged.
- Suggested skills for your profile - The Skills You Might Have section is renamed Suggested skills for your profile. When managers view a subordinate's page, the section name is Suggested skills for their profile. The functionality is unchanged.
- Skills you're excluding - The Skills You Don't Want to Develop section is renamed Skills you're excluding. When managers view a subordinate's page, the section name is Skills they're excluding. The functionality is unchanged.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants the ability to view an employee's 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
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
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	Core Administration

permissions to edit rating scales or templates. This permission cannot be constrained.

Critical skills widget

This widget displays a graphical representation of the user's critical skills and status. Within the graph, the widget displays the total number of critical skills in which their proficiency is below expectations. If the user has no skills in which their proficiency is below expectations, the widget displays the number of skills in which their proficiency meets expectations. If the user has no skills in which their proficiency meets expectations, the widget displays the number of skills in which their proficiency is above expectations.

If a critical skill does not have a target, then a user's status is determined in the following way:

1. If the user has not declared the skill, the user's status is Below expectations.
2. If the user has declared the skill, the user's status is Expectations met.

Your skill proficiency widget

This widget displays a graphical representation of the user's declared skills and proficiency level. Within the graph, the widget displays the total number of declared skills.

Complete your profile widget

This widget visually displays the completeness of a user's skills profile and encourages them based on incomplete areas. The following steps are tracked in the Complete your profile widget:

- Add at least five skills to your profile
- Add two skills you want to develop
- Rate at least five of your skills - When you select the **Rate my skills** link, you will see actions based on your organization's configuration. For example, you may see Rate My Interest or Rate My Proficiency.

Select the **Add skills** link to open the Manage Skills pop-up where users can add skills to their profile.

This widget is hidden once all three tasks are complete.

Skills Profile - Critical Skills

If you belong to an organizational unit (OU) with an associated capability model, a Critical skills page can be accessed from your Skills Profile.

The Critical skills page outlines your critical skills, predicted proficiency ratings, targets, and status for the proficiency target. The highest proficiency target and the corresponding status are displayed if you are aligned to multiple competency models with different proficiency targets for the same skills.

The color associated with the skill tag indicates the skill association. Green indicates developing, blue indicates declared, white indicates suggested, and gray indicates hidden.

Your predicted proficiency rating is an amalgamation of all declared ratings for you (Self, Manager, and Peers) and your skill level that can be inferred from your job history and job title.

You can perform actions on a single skill by selecting the options menu (three dots) to the right of the skill name. You can perform bulk actions on all critical skills by selecting the options menu (three dots) in the upper-right corner of the table.

Select the heartbeat icon to open the Critical Skills Progress Tracking flyout. This option is only available if enabled in Skills Profile Preferences. *See Skills Profile - View Critical Skills Progress.*

To access the Critical skills page, go to HOME > UNIVERSAL PROFILE. Then, click the Skills tab. In the Critical skills widget, select the **View critical skills** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants the ability to view an employee's 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
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
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

Critical skills ⓘ

⇅ Name	⇅ Your proficiency	⇅ Expected proficiency	⇅ Status
🔖 Defining Goals ⋯	Guiding	Expert	Above expectations
Java Development ⋯	Learning	Applying	Below expectations
Accessibility ⋯	Guiding	Expert	Below expectations
HTML5 ⋯	Learning	Applying	Below expectations
Interaction Design ⋯	Guiding	Expert	Expectations met
🔖 Communication ⋯	Guiding	Expert	Above expectations
Axure ⋯	Learning	Applying	Below expectations
Branding ⋯	Guiding	Expert	Below expectations
Management ⋯	Learning	Applying	Below expectations
User Experience Design ⋯	Guiding	Expert	Expectations met

People Matrix - Critical Skills Team Matrix

People Matrix - Critical Skills Team Matrix

A new default view option is added to the People Matrix for managers to see their team's critical skills and proficiency. This new read-only view saves time as it requires no setup.

Considerations

- The **VIEW CRITICAL SKILLS** button is available to all users accessing the People Matrix homepage. If a non-manager accesses the Critical Skills people matrix, it will be empty because the user does not have subordinates.
- Critical skills for each team member are pooled together from various models. If a skill exists in multiple models, the skill with the highest target will be shown. This is existing behavior.
- The system-generated Critical Skills people matrix cannot be edited, deleted, or copied. This matrix will remain in sync with any changes made to the relevant models.

Implementation

This functionality is automatically enabled for all organizations. A new option to generate a team matrix of critical skills is added to the People Matrix homepage.

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

People Matrix Homepage - View Critical Skills

With this enhancement, a **VIEW CRITICAL SKILLS** button is now available on the People Matrix Homepage. When users select this button, the system generates a people matrix of the user's subordinates and their critical skills.

Critical skills for each team member are pooled together from various models. If a skill exists in multiple models, the skill with the highest target will be shown. This is existing behavior.

The system-generated Critical Skills people matrix cannot be edited, deleted, or copied. This matrix will remain in sync with any changes made to the relevant models.

The **VIEW CRITICAL SKILLS** button is available to all users accessing the People Matrix homepage. If a non-manager accesses the Critical Skills people matrix, it will be empty because the user does not have subordinates.

To access the People Matrix homepage, go to SKILLS > PEOPLE MATRIX.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available in the People Matrix. This is a manager permission.	Core Administration
User Ratings - View All Shared Ratings	Grants 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

People Matrix

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

Team Matrices (12)

View critical skills | Create New

Core Skills Matrix (C) - With Targets Defined	Core Skills Matrix - No Targets Defined	Agui's Team matrix _ Skills and training	Nursing Matrix Model
Skills: (11)	Skills: (9)	Skills: (5)	Skills: (9)
Total Employees: (160)	Trainings: (1)	Trainings: (4)	Total Employees: (11)
	Total Employees: (6)	Total Employees: (5)	
⊘ 1 ⊙ 157 ⚠ 2	⊘ 0 ⊙ 6 ⚠ 0		⊘ 4 ⊙ 12 ⚠ 0
As of: 11/30/2023	As of: 9/12/2023	As of: 9/18/2023	As of: 12/5/2023

Core Skills Matrix (M)	Core Skills Matrix - With Targets and training	Agui's Team matrix _ Skills only	Agui's Team matrix _ Training only
Skills: (5)	Skills: (11)	Skills: (5)	Trainings: (4)
Total Employees: (315)	Trainings: (4)	Total Employees: (5)	Total Employees: (5)
⊘ 8 ⊙ 305 ⚠ 2	Total Employees: (5)	⊘ 1 ⊙ 2 ⚠ 2	⊘ 1 ⊙ 4 ⚠ 0
	⊘ 0 ⊙ 5 ⚠ 0		
As of: 12/6/2023	As of: 9/29/2023	As of: 11/21/2023	As of: 8/30/2023

Core Skills Matrix - With NO Targets and training	My Team Matrix - with training	Group Matrix	My Team Matrix
Skills: (11)	Trainings: (2)	Skills: (3)	Skills: (2)
Trainings: (3)	Total Employees: (5)	Total Employees: (3)	Total Employees: (4)
Total Employees: (5)	⊘ 0 ⊙ 5 ⚠ 0	⊘ 0 ⊙ 3 ⚠ 0	

People Matrix

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

Hi Cornerstone, let's get you all set up

You can either create a new team matrix or work on the existing critical skills

Create new

View critical skills

People Matrix - Required Employees on Target

People Matrix - Required Employees on Target

With this enhancement, when creating a people matrix, users can define the number of skilled people required for a particular team, organizational unit (OU), or position. With this functionality, administrators can create a custom matrix to quantify if the required number of employees have the necessary skills at the OU or position level. Within their teams, managers can easily track if they have the required employees with the necessary skills and proficiencies.

Managers can use this functionality to build a team with the right mix of skills or as an overview of the team's skills status to help define future development and planning.

Considerations

- The **Employees Needed to Achieve Target** field is only available for matrices created from scratch, not those created from a capability model template.
- The **Employees Needed to Achieve Target** value may be set to a value larger than the number of users in the people matrix.

Implementation

This functionality is automatically enabled for all organizations. A new **Employees Needed to Achieve Target** field is available for matrices created from scratch. This field is optional, and the default value for the field is zero.

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 Matrix - Employees Needed to Achieve Target

A new **Employees Needed to Achieve Target** field is available on the Set target step when creating a custom people matrix. With this field, users can specify the number of employees required to have each skill and the required proficiency. This field is optional, and the default value for the field is zero. The maximum value is 999.

Users can only set the **Employees Needed to Achieve Target** field when the **Proficiency Target Level** field is set for the skill.

To create a People Matrix, go to SKILLS > PEOPLE MATRIX.

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

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available in the People Matrix. This is a manager permission.	Core Administration
User Ratings - View All Shared Ratings	Grants 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 Matrix

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

▬ ▬ ▭ ▭

Step 2 - Select Skills

Select skills that will be displayed on the matrix for your team. You can add skills individually or in bulk using capability models as the source.

Search skills

| Q Enter a skill name |

Select skills from a capability model

| Q Enter a model name |

[Remove selected (2)]

☐ Skills: (6)	Capability Model	Proficiency Target Level	Employees Needed to Achieve Target
☑ accounting systems	Customer Success	3 - Intermediate ∨	0
☑ accounting	Customer Success	4 - Advanced ∨	0

Skills Your Team Might Have

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

business development ＋   marketing ＋   leadership ＋   project management ＋   strategic planning ＋   team leadership ＋

business strategy ＋   strategy ＋   consulting ＋

| Back | | Cancel | Next |

View Matrix - Employees Needed to Achieve Target

When viewing a people matrix, if an **Employees Needed to Achieve Target** value is set for a skill in the matrix, then the people matrix indicates how many employees are on target for the skill and how many employees are required to be on target for the skill. This information helps managers and administrators quickly identify whether the team or group has the necessary number of adequately skilled employees for each skill.

This is displayed as [Number of employees on target]/[Number of employees needed].

This value does not display if the **Employees Needed to Achieve Target** value is set to zero or is not set.

The **Employees Needed to Achieve Target** value may be set to a value larger than the number of users in the people matrix.

To view a People Matrix, go to SKILLS > PEOPLE MATRIX. Then, select the appropriate matrix.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available in the People Matrix. This is a manager permission.	Core Administration
User Ratings - View All Shared Ratings	Grants 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

Core Skills Matrix - With Targets and training

Team Matrix with Targets

Search Employee

🔍 Employee

Overall Skill and Training Score: ✓ Target Met - **0** ⚠ Near Target - **0** ⊘ Off Target - **5** ❯

Employees: (5)

| | SKILLS | TRAININGS | | Rating Source | Latest Manager Rating ⌄ |

I= Employee Name	I= Overall Skill and Training Score	I= analytics 👤 5/3	I= communication 👤 5/2	I= marketing 👤 5/1	I= marketing mix 👤 5/1	I= Project Management 👤 4/1	
Al Morris Sales Director	⊘ 56% 4/9 pending	✓④	✓⑤	✓④	✓③	✓④	•••
Andrea Quinn Field Agent	⊘ 56% 4/9 pending	✓③	✓③	✓③	✓②	✓⑤	•••
Julie Gilbert Corporate Services…	⊘ 56% 4/9 pending	✓④	✓③	✓④	✓④	✓④	•••
Richard Martin Production Manager	⊘ 44% 5/9 pending	✓④	✓②	✓⑤	✓⑤		•••

People Matrix - Usability Enhancements

People Matrix - Usability Enhancements

People Matrix is enhanced to make it easier to see actionable data and lessen maintenance efforts. Users can spend less time hunting for critical data and keeping matrices up-to-date.

The following usability enhancements have been made to the People Matrix functionality:

- People Matrix Settings - Administrators gain the ability to enable and disable the use of training and capability models. *See* **People Matrix Settings** on page 52 *for additional information.*
- Create Custom Matrices from Capability Models - Create relevant and consistent Custom Matrices using organizational Capability Models as the starting point. Customize the matrix by adding additional metrics and users not usually tracked by the model. *See* **Create Custom Matrices from Capability Models** on page 53 *for additional information.*
- New Matrix Setting to Track the Latest Version of Training - When training is versioned, there is no need to revise the training list. This saves time and effort because the matrix is always up to date. *See* **New Matrix Setting to Track the Latest Version of Training** on page 55 *for additional information.*
- See Summary of Skill Gaps - Actionable insight to help managers pinpoint where to spend time helping their teams grow. Can display skills and training gaps based on training and skills tracked in the matrix. *See* **Summary of Skill Gaps** on page 57 *for additional information.*

Considerations

The **Track Latest Version of Training** option is an optional field that applies to all selected training. When this option is selected, the matrix is only updated if the training is reversioned and assigned to users. If the training is versioned but not assigned to the user, then the matrix is not updated. As a result, if training is reversioned and only assigned to some users, the matrix could include a user on target for completing version 1 of the training and another user off target for not completing version 2 of the same training.

The following considerations apply to the Create Custom Matrices from Capability Models feature:

- Currently, there are no availability rules for capability models, meaning that models are available to all users. However, user constraints and the Audience setting are still applicable.
- Users can add multiple models, and the skills from all included models will be listed in alphabetical order. In a future release, skills may be grouped by model when multiple models are added.
- If a skill is present in multiple models, the Capability Model column displays the most recently added model.
- The skills and targets used in the matrix are specific to the time when the matrix was created. If the model is updated, the matrix will not automatically update.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

People Matrix - Manage Preferences	This grants the ability to manage the People Matrix Settings. 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
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

People Matrix Settings

A new People Matrix Settings page is available, allowing administrators to enable and disable the use of training and capability models.

To manage People Matrix Settings, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PEOPLE MATRIX SETTINGS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix - Manage Preferences	This grants the ability to manage the People Matrix Settings. This permission cannot be constrained. This is an administrator permission.	Core Administration

The following settings are available:

- **Enable use of capability models** - When this toggle is enabled, users can create a people matrix using a capability model as a template. This enables users to save time while creating the matrix because this populates the matrix with the settings from the capability model, including the appropriate set of users, the relevant skills, and the corresponding ratings.
- **Add trainings to matrices** - This option is only available for organizations using Learning. When this toggle is enabled, managers can add training to the people matrix. This enables users to track critical training completions in the matrix.

Create Custom Matrices from Capability Models

When creating a people matrix from scratch, a **Select skills from a capability model** drop-down is now available on the Select Skills step. When a user selects a capability model from this drop-down, the skills and targets are retrieved from the model and added to the matrix.

Multiple capability models can be selected. If a skill has multiple targets, the highest target is used.

When a model is selected, the audience is not carried into the matrix.

A Capability Model column is added to the Select Skills page to indicate whether the skill was added from a capability model or ad hoc. If the skill was added from a capability model, the name of the capability model is displayed. If a skill is present in multiple models, the Capability Model column displays the most recently added model. The matrix is not automatically updated when a capability model is updated. When editing a matrix, an alert is displayed if the selected skills and targets do not match the capability model, and users can re-add the model to use the latest version.

To create a People Matrix, go to SKILLS > PEOPLE MATRIX.

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

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available in the People Matrix. This is a manager permission.	Core Administration
User Ratings - View All Shared Ratings	Grants 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 Matrix

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

▬▬ ▬▬ ▭▭ ▭▭

Step 2 - Select Skills

Select skills that will be displayed on the matrix for your team. You can add skills individually or in bulk using capability models as the source.

Search skills

🔍 Enter a skill name

Select skills from a capability model

🔍 Core Skills (2 div) ⊗

| Core Skills (2 div) |
| Core skills - Please don't modify |

[Remove selected (5)]

☑	Skills: (5)	Capability Model	Proficiency Target Level	Employees Needed to Achieve Target
☑	analytics	Core Skills (2 div)	2 - Advanced Beginner ⌄	0
☑	communication	Core Skills (2 div)	2 - Advanced Beginner ⌄	0
☑	marketing mix	Core Skills (2 div)	2 - Advanced Beginner ⌄	0
☑	marketing	Core Skills (2 div)	2 - Advanced Beginner ⌄	0
☑	Project Management	Core Skills (2 div)	2 - Advanced Beginner ⌄	0

New Matrix Setting to Track the Latest Version of Training

When creating a people matrix from scratch, a **Track latest version of the training** option is now available on the Select Training step. When this checkbox is selected, any time a learning object in the matrix is updated, reversioned, and assigned to users, the people matrix displays the completion status of the latest training version assigned to the user.

This option applies to all of the training in the matrix. When this option is selected, the matrix is only updated if the training is reversioned and assigned to users. If the training is versioned but not assigned to the user, then the matrix is not updated. As a result, if training is reversioned and only assigned to some users, the matrix could include a user who is on target for completing version 1 of the training and another user who is off target for not completing version 2 of the same training.

In the matrix, users can hover over the training status to view the version of the training that is currently used. If this checkbox is not selected, only the current training version will be used in the matrix, even when the training is reversioned.

To create a People Matrix, go to SKILLS > PEOPLE MATRIX.

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

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available in the People Matrix. This is a manager permission.	Core Administration
User Ratings - View All Shared Ratings	Grants 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 Matrix

▬▬ ▬▬ ▬▬ ▬

Step 3 - Select Trainings

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

☐ Track latest version of the training

🔍 Start typing to find a training | Remove selecte

☑ Trainings: (4)   Type   Duration

☑   Strategy & Businesses Models

This class identifies the tool adjustments necessary for setting up an accurate CNC operation for   Online Class   5 hours, 30 minutes   🗑
business. *Includes an Interactive Lab.*

☑   The key to success? Grit: Angela Lee Duckworth

Leaving a high-flying job in consulting, Angela Lee Duckworth took a job teaching math to seventh   Online Class   7 minutes   🗑

Summary of Skill Gaps

Previously, the people matrix displayed how many of the skills and training in the matrix each user had. For example, if a user had four of the eight skills in the matrix, "4/8" would display.

With this enhancement, this fraction is now a link. Matrix viewers can select the link to open the Summary of Skill Gaps flyout, which displays a summary of the skills and training gaps for the user.

The Summary of Skill Gaps flyout displays the user's overall target status for all skills and training and the number of skills and training not on target. The flyout also lists all skills and training that are not on target so the matrix viewer can quickly see which skills and training need action.

The matrix viewer can select the left and right arrows to view different users in the skills matrix.

To view a People Matrix, go to SKILLS > PEOPLE MATRIX. Then, select the appropriate matrix.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
People Matrix	Grants access to the People Matrix functionality. This permission can be constrained to User, OU, User's OU, User Self and Subordinates, and User's Direct Subordinates. The constraints on this permission determine which users are available in the People Matrix. This is a manager permission.	Core Administration
User Ratings - View All Shared Ratings	Grants 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

Core Skills Matrix - With Targets and training

Team Matrix with Targets

Search Employee

🔍 Employee

| Overall Skill and Training Score: | ✓ Target Met - 0 | ⚠ Near Target - 0 | ⓘ Off Target - 5 | ❯ |

Employees: (5)

SKILLS   TRAININGS

Rating Source | Latest Manager Rating ▼ | ⚏

⌶≡ Employee Name	⌶≡ Overall Skill and Training Score	⌶≡ analytics 👤 5/3	⌶≡ communication 👤 5/2	⌶≡ marketing 👤 5/1	⌶≡ marketing mix 👤 5/1	⌶≡ Project Management 👤 4/1	
Al Morris Sales Director	ⓘ 56% 4/9 pending	✓ 4	✓ 5	✓ 4	✓ 3	✓ 4	...
Andrea Quinn Field Agent	ⓘ 56% 4/9 pending	✓ 3	✓ 3	✓ 3	✓ 2	✓ 5	...
Julie Gilbert Corporate Services...	ⓘ 56% 4/9 pending	✓ 4	✓ 3	✓ 4	✓ 4	✓ 4	...
Richard Martin Production Manager	ⓘ 44% 5/9 pending	✓ 4	✓ 2	✓ 5	✓ 5		...

Overall Skill and Training Score ✕

| 🌍 Andrea Quinn Field Agent | ⓘ Off Target | 4 skill gap(s) | 4 training(s) pending | ❮ ❯ |

Gaps in skills and trainings

SKILL GAPS		All ▼	TRAINING GAPS		All ▼
Skill	**Current**	**Target**	**Training**	**Status**	
analytics	3	4	Business Development	ⓘ Not Started	
communication	3	4	Data Analysis with Python	ⓘ Not Started	
marketing	3	4	The secret structure of great talks: Nancy Duarte	Assign	
marketing mix	2	4	Video Training	Assign	

Close

Reporting Fields - Capabilities

With this enhancement, the following new Learning fields have been added to the Capabilities section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Category ID	Unique ID of the category	Text
Category Name	Name of the category	Text
Category Status	Current status of the category	Text

How Does this Enhancement Benefit My Organization?

New fields enable users to include the skill category when reporting on Capabilities.

Implementation

This functionality is automatically enabled for all organizations using the Reporting 2.0 module.

Permissions

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

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

Skill Proficiency Experience Improvements

With this enhancement, the following improvements are included to improve the overall skill proficiency experience:

- Predict Proficiency for Skills You Are Developing
- Administrator Managed Proficiency Scores
- Additional Timeline Filter to Track "Your Critical Skills" Progress
- Removal of Predicted Proficiency Permission

Predict Proficiency for Skills You Are Developing

Previously, predicted proficiency scores were exclusively calculated for "Your Skills" and "Critical Skills."

With this enhancement, predicted proficiency scores are available for "Skills you're developing." Users now receive predicted proficiency scores for the skills they are developing based on profile indicators such as work experience, declared skills, and ratings.

Administrator Managed Proficiency Scores

With this enhancement, administrators can recalculate predicted proficiency scores using a new proficiency score recalculation setting in Capabilities Preferences, eliminating the need to submit a work order for this task.

Within Capabilities Preferences, a new Proficiency Score Recalculation section is available. Administrators should recalculate proficiency scores when there is a change in logic for any backend attributes such as proficiency levels or rating scales. Customers may also recalculate predicted proficiency scores if they observe any unexpected data regarding predicted proficiency scores.

To access Proficiency Score Recalculation Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PREFERENCES. Then, select the Proficiency Score Recalculation tab.

Additional Timeline Filter to Track "Your Critical Skills" Progress

Previously, it was only possible to view six months of data when viewing proficiency progress via the Critical Skills Progress flyout.

With this enhancement, a timeline filter is available with an option to view either 6 months or 12 months of data.

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 **View critical skills** link.

Then, select the Heartbeat icon ⚡.
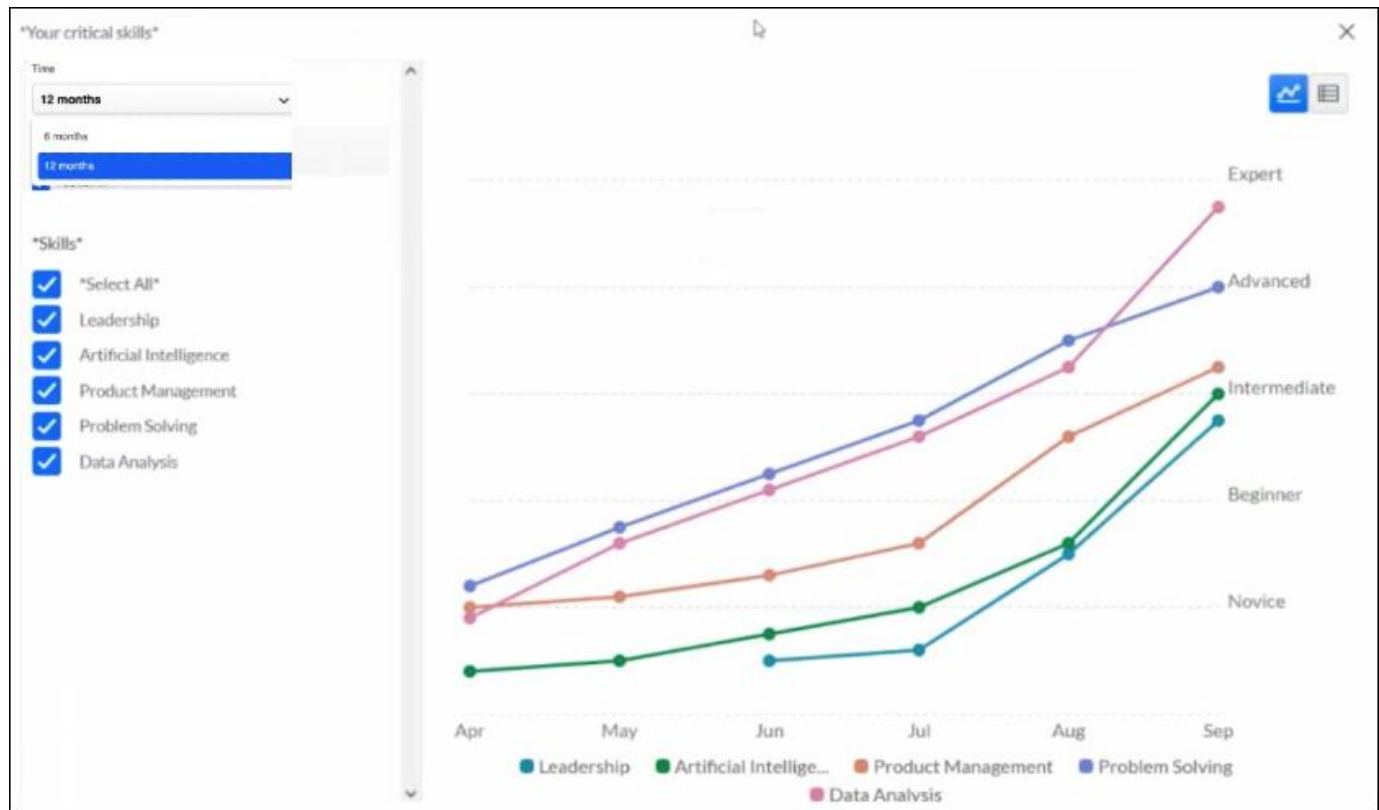
Removal of Predicted Proficiency Permission

Previously, administrators could add or remove the "Capabilities - Predicted User Proficiency Levels - View" permission from any security role, but doing so inadvertently disrupted other system functionalities.

With this enhancement, the "Capabilities - Predicted User Proficiency Levels - View" permission is removed from portals. Since predicted proficiency operates more as a service than a feature, removing this permission does not impact the ability of managers to view proficiencies for their subordinates.

Frequently Asked Questions (FAQs)

As an administrator, how will I know I need to refresh the predicted proficiency score?

Administrators should refresh the predicted proficiency scores when there is a change in logic for any backend attributes such as proficiency levels or rating scales. Customers may also recalculate predicted proficiency scores if they observe any unexpected data regarding predicted proficiency scores.

Does removing the "Capabilities - Predicted User Proficiency Levels" permission impact the functionality of any other existing features?

No, there will be no impact on other features.

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's 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
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
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

Integrations & APIs - Capabilities

CSX and EdCast Skills Integration

Customers leveraging both CSX and EdCast can now have an integrated experience for skills with consistent skills libraries and the ability to modify user Skill Profiles in either platform, keeping both in sync.

With this integration, administrators no longer need to administer skills in CSX and EdCast separately. The CSX and EdCast integration simplifies the administrator and end-user experiences by synchronizing appropriate data between systems. This results in easier adoption, greater data integrity, and a consistent and intuitive user experience.

This integration provides the following features:

- One-way synchronization of skills from the CSX Capability Library to EdCast via Skills Studio
- Bi-directional sync of user-related skills data, such as declared and developing skills and self-ratings, between CSX and EdCast

Skill library synchronization includes the unique skill ID, title, description, created or modified user, date and time of creation or modification, source, localizations, status, and categories.

User profile synchronization includes the unique user ID, skill ID, and action (declared, developing, removed).

Skill rating synchronization consists of the user who received and shared the rating and the rating level.

Implementation

Existing customers leveraging CSX and EdCast can submit a case to customer support to enable the integration. Integrations for existing customers will be managed on a case-by-case basis. There may be added complexity if skills are already in use in both systems, especially if different skills taxonomies are enabled in each.

This integration is not available in stage portals.

Core/General Enhancements

Accessibility Enhancements - March 2024

With this enhancement, Cornerstone CSX has made accessibility enhancements to empower users with disabilities by providing an inclusive and seamless user experience, enhancing their ability to access, understand, and interact with our digital content effectively.

The following accessibility enhancements are included:

- 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
- **Reporting 2.0 - Accessibility Enhancements**

Search Preferences

In Search Preferences, the following enhancements were made:

- Added descriptive text for buttons
- Fixed the following Focus Order issues:
    - Non-interactive element received keyboard focus
    - Focus did not move to the triggering element
    - Focus was not set onto modal dialog
- Added grouping for form controls
- Added keyboard support for interactive elements
- Added landmark labels

Playlists

When viewing a playlist, the following enhancements were made:

- Fixed the following Screen Reader issues:
    - Viewing a Playlist did not produce intuitive results using the JAWS screen reader
    - Incomplete page title
    - The currently selected link was only communicated visually
    - Redundant alternative text for image links
    - The screen reader announced unnecessary content
    - Identical label for combo box
    - Role was defined inappropriately
    - Label was not defined for navigation landmark
    - Decorative icon was not hidden
    - Description list was not declared

- Fixed the heading structure
- Fixed the following Focus Order issues:
    - Focus moved inappropriately
    - Modal dialog did not trap the screen reader's focus
- Removed unnecessary grouping
- Fixed an inappropriately defined role

Playlist Preferences

In Playlist Preferences, the following enhancements were made:

- Fixed an incomplete page title
- Defined a heading
- Fixed the following Screen Reader issues:
    - The accessible name did not match the visual label
    - Aria attribute was defined incorrectly
    - Button labels were incomplete

Learning Search

In Learning Search, the following enhancements were made:

- Fixed the following Screen Reader issues:
    - The Star Rating was inaccessible for all users
    - Role was defined inappropriately
    - The Aria role was defined incorrectly
    - Link text was not defined for the Home link
    - Decorative icon was not hidden
    - The screen reader announced unnecessary content
    - Current page state was not defined
- Fixed missing labels for actions combo box

Learner Home Preferences

In Learner Home Preferences, the following enhancements were made:

- Improved color contrast for text
- Fixed the focus for the Select an image button
- Fixed the following Focus Order issues:
    - Non-interactive elements received focus
    - Focus moved inappropriately
    - Focus did not remain on the activated checkbox
- Fixed the following Screen Reader issues:
    - Missing heading markup
    - The screen reader did not announce a character countdown for the input field
    - Missing labels for the expand buttons
    - Decorative icons were not hidden
    - A title existed on non-interactive elements

- Inappropriate page titles
- Incomplete labels for buttons
- Dynamically updated content was not updated
- Unnecessary alt was provided for decorative images
- Identical label for Restore and Enabled buttons
- Fixed the following Grouping issues:
  - No legend was provided
  - Missing grouping of radio buttons
- Fixed the accessible labels to match the visual labels

Learning Assignment Tool

In the Learning Assignment Tool, the following enhancements were made:

- Fixed the following Focus Order issues:
  - The focus did not move to the error field
  - The focus did not move to the Close control after selecting All users
  - The focus did not move to the first interactive control of the Filter screen
  - The focus landed on the entire screen after selecting the User Criteria control
- Fixed the screen reader to announce error messages

ILT Facility and Resources

In the ILT Facility and Resources, the following enhancements were made:

- Fixed the screen reader focus upon activating the View active vendors only checkbox, the list of items in a combo box, and the Previous and Next links
- Fixed the screen reader to properly announce the Next and Previous links

Extended Enterprise

Throughout Extended Enterprise, the following enhancements were made:

- When checking out in the Shopping Cart, the contrast ratio of text elements is fixed
- When viewing the Order History, the focus highlighting is fixed
- In the Shopping Cart Options drop-down, non-descriptive links are fixed
- In the Order History, labeled form elements

Connect

Throughout Connect, the following enhancements were made:

- Fixed the following Color Contrast issues:
  - Improved color contrast for the error message when a community member replies to a posting
  - Improved color contrast for the Delete option for an Expert post
  - Improved color contrast for the text in an Expert post
- Added a distinct style for the Add a file link when a community member replies to a post
- Associated the error message with the input fields when an administrator is adding a community
- Fixed the following Focus Order issues:
  - When creating a posting and adding tags, the focus moved inappropriately

- When deleting a posting, the focus did not move to the triggering element
- When viewing a posting, identical text existed for the More options link
- Fixed the incorrect placement of a label for instructions when adding a community
- Ensured IDs are unique for active elements on the main page of a community
- Fixed the following Screen Reader issues:
  - An inappropriate label appeared for a landmark when a visitor was viewing a posting
  - Alt text was all white space when a visitor was viewing a posting
  - The selected state was not defined when adding a posting and adding tags as a community member
  - The role was not defined when adding a posting as a community member
  - The labeling was unclear on reply windows when replying to a discussion posting
  - As a community expert, the Like link did not have descriptive text
  - As a community expert, there were identical and non-descriptive labels for buttons
  - As a community expert, the alt text was all white space
  - As a community expert, there was no link text
  - As a community expert, the Aria attribute used an incompatible element

Implementation

This functionality is automatically enabled for all organizations.

This functionality is not available during UAT.

Concurrent Group Edits Guardrail

If two administrators edit the same group at the same time, the edits that are saved last overwrite the edits saved first. Previously, the system did not have any guardrails to prevent this.

With this enhancement, when an administrator attempts to save a Group, generate a preview, or save a draft, the system now confirms that the Group was not modified and saved by another administrator while they were editing it. If the Group was modified, the administrator attempting to save changes receives a Group Modified notification and cannot save the edits. This prevents unexpected changes in Group membership that may occur when one administrator accidentally overwrites the edits of another administrator.

The Group Modified notification includes the name of the administrator and the date and time at which they saved their changes.

Administrators who receive this message can select **GO BACK** to return to the Group and cancel their edits. This enables them to view their edits before canceling them. Selecting select **CLOSE** immediately cancels the edits and returns the administrator to the Manage Groups page.
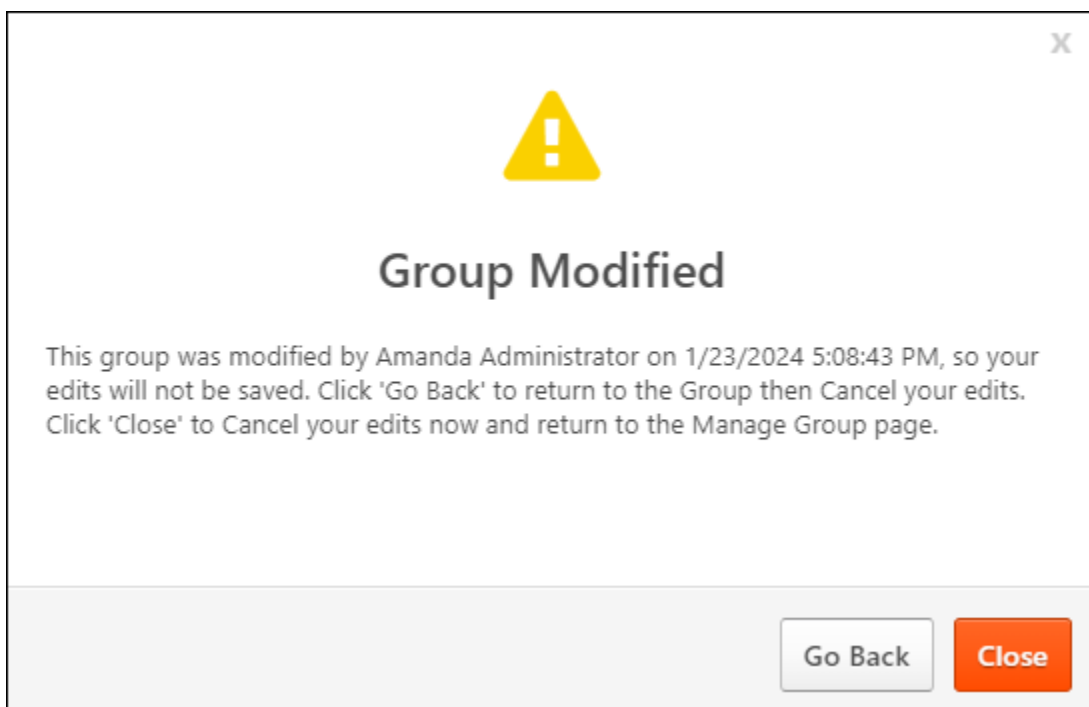
Frequently Asked Questions (FAQs)

Do we need the Group Preview and Save Draft functionality enabled for the Concurrent Group Edits Guardrail to work?

No. The Concurrent Group Edits Guardrail works for all customers.

If an administrator is editing a group and the same group is updated by an Edge Import Group Membership load, will the administrator receive the Group Modified notification?

Yes. If the Group's membership is modified by Edge Import or Data Load Wizard, any administrator editing the Group in the user interface while the modification occurs will receive the Group Modified notification when they attempt to save, generate a preview, or save a draft.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

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

Default Email Address Settings - Modification History Sorting Option

With this enhancement, administrators can now sort the Date changed and E-mail type columns in the Modification History section when managing default email addresses in Corporate Preferences.

To access Corporate Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > CORPORATE PREFERENCES.

Considerations

Currently, only the Date changed and E-mail type columns are sortable.

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

Filter "Manage Group" Table to View Drafts

With this enhancement, an **Only groups with a draft** checkbox is now available for customers who have activated the Group Preview and Save Draft functionality. When this checkbox is selected, the table only displays groups that have a draft. This enables administrators to efficiently identify and manage draft groups.

Frequently Asked Questions (FAQs)

What happens when I check both the **Include inactive** and the **Only groups with a draft** checkbox filters on the Manage Groups page?

Only active groups with a draft will display. Inactive groups cannot have a draft.

What happens when I check the **Only groups with a draft** checkbox filter on the Manage Groups page but there are no drafts in the system?

The table will be blank and show "(0 Results)."

Implementation

This functionality is automatically enabled for all organizations that have activated the Group Preview and Save Draft functionality. This can be activated in Group Preferences.

Permissions

The following existing permission applies 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 - 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 (General Availability)

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 functionality allows 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 the Group Preview functionality:

- 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 feature 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.

Implementation

Administrators with the *Group Preferences - Manage* permission can activate and configure the Group Preview functionality via the Group Preferences page in Core Preferences. Group Preferences are global and cannot be configured by OU.

Permissions

The following existing permissions apply 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
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

Language Pack Updates - March 2024

New updates to Cornerstone Language Packs and additional languages are available with the March '24 Release. Please visit the **March '24 Language Pack Updates** and **March '24 Release Global Edit Updates** postings to review the full list of changes and their targeted availability in stage and production environments.

Languages included in the March '24 Release Language Pack Updates:

- German
- Hebrew
- Polish
- Portuguese (Portugal)
- Swedish
- Ukrainian

Languages included in the March '24 Release Global Edit Updates:

- French (France)
- Polish
- Romanian

Implementation

This functionality is automatically enabled for all organizations.

Multi Factor Authentication

Multi Factor Authentication (Early Adopter)

Cornerstone is excited to support time-based one-time passwords (TOTP), the most widely adopted two-step verification method and considered a secure method for multi-factor authentication (MFA). This smart and secure two-factor authentication (2FA) solution builds stronger authentication into the Cornerstone CSX standard login process.

Multi-factor Authentication includes the following features:

- No dependencies to 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
- Highly configurable solution based on Location OU, Division OU, or individual Users
- Easy for admins to configure for quick enablement and rollout to a specific portal
- The solution is independent of existing or new single sign-on (SSO) integrations. The MFA solution can also run in parallel to SSO.

MFA was previously available in stage portals only during the Open Beta phase. With the March '24 Release, MFA moves to the Early Adopter phase, and administrators can activate it in pilot and production portals.

The following new features are available with the March '24 release:

- Corporate Branding - The initial MFA login page adopts the branding from login pages created with the Custom Login Page tool
- Skip on subsequent logins - A new administrator setting enables organizations to skip the multi-factor authentication on subsequent logins

MFA is ready for testing as of February 29.

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

- When adding new OUs in the MFA Configuration page, all previously selected OUs needs to be re-selected, otherwise they will be removed from the list. This will be improved with the July release.
- The following features are currently not supported:
    - External Candidates (Recruiting)
    - Cornerstone CSX mobile application
    - 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
- The copy-down process (from Production to Pilot/Stage) copies the MFA configuration, not individual mobile device registrations. End users who are required to log in with MFA must register a new mobile device while they log in to the Stage or Pilot portal for the first time.

Implementation

This functionality can be self-activated via Feature Activation Preferences. Once activated, administrators can configure the feature via Multi-Factor Authentication Preferences.

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

MFA is not ready to test at the start of UAT. Customers are encouraged to not activate this feature at the start of UAT; it is targeted to be ready for testing with the UAT 2 deployment to stage portals.

Workflow to Determine if MFA is Required for a User

The Cornerstone MFA solution uses the following process to check the MFA Configuration settings and identify which users need to log in with MFA:
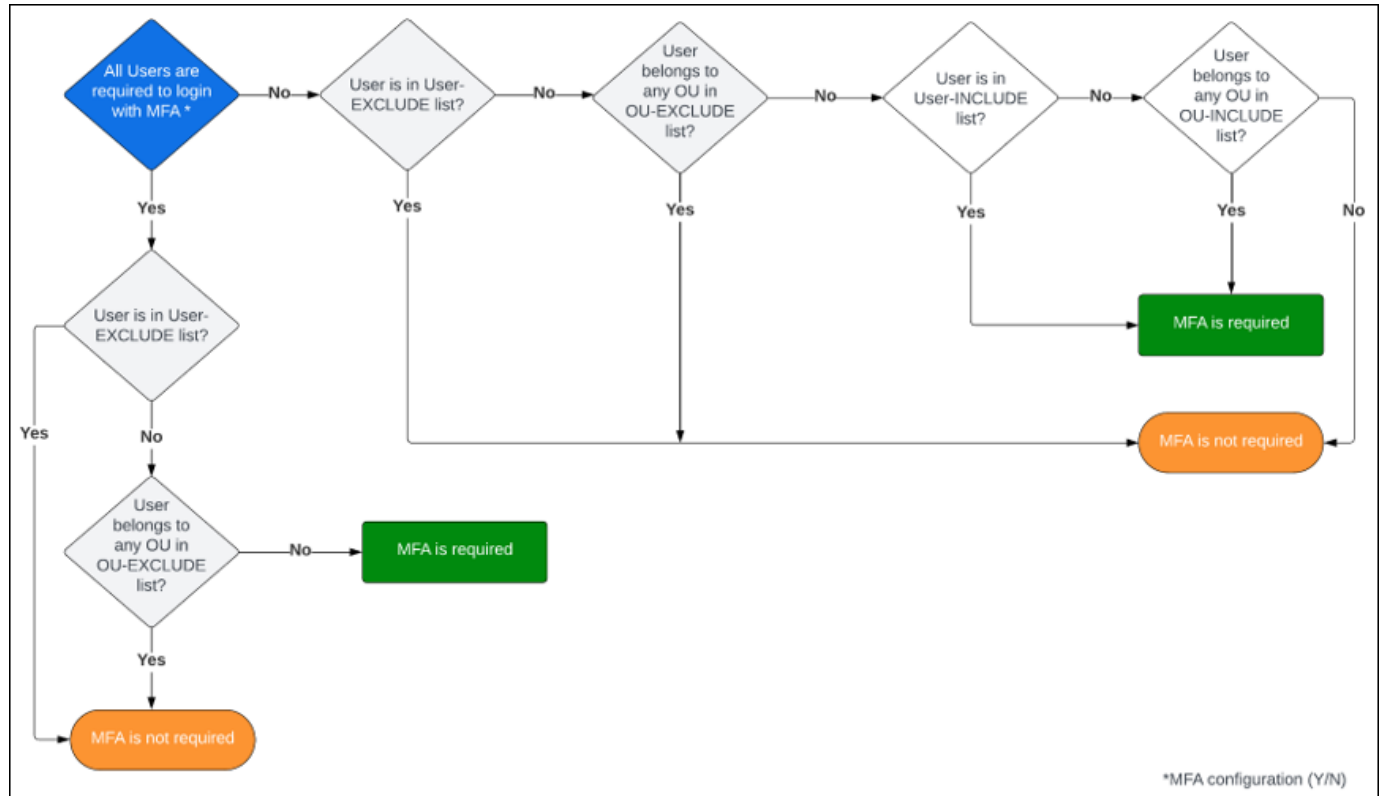
MFA User Login Workflow
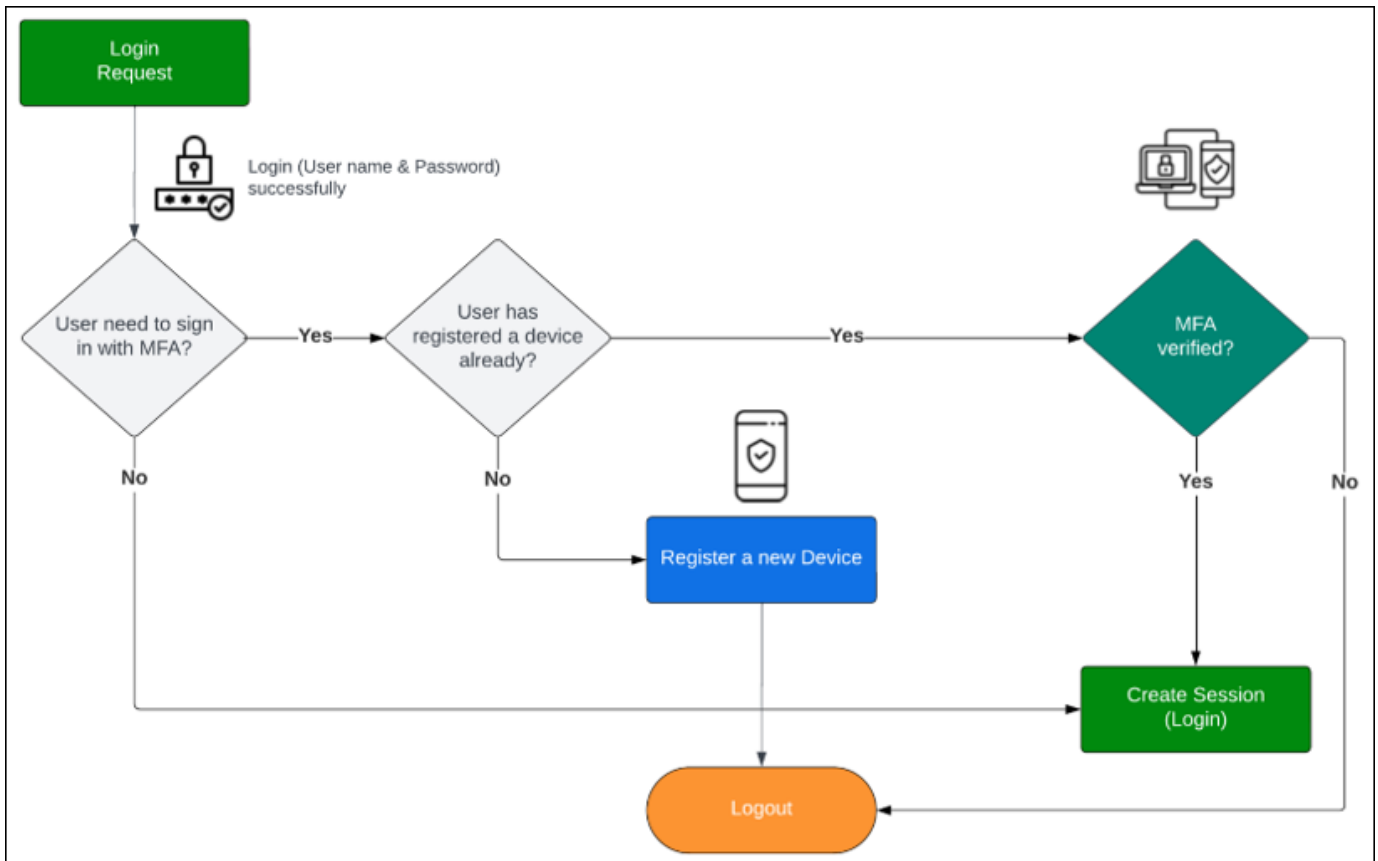
Frequently Asked Questions (FAQs)

Can an administrator register a device on behalf of a user?

No. This is not possible for security reasons.

How do I identify if a user is required to log in with MFA?

Users can navigate to My Account > MFA, and administrators can select the MFA option on the User Records page. A message indicates whether MFA is required for the user.

Does a user require an email address to log in with MFA?

No. An email address is not required.

How many MFA devices can each user register?

Cornerstone MFA supports only one secret key, which will be created and associated with the user while registering a new device. Usually, this means one mobile device per user.

However, it is possible to register multiple devices by simply re-using the same QR code or secret key. For example, when a user registers a mobile device using the QR code, the user can register two mobile devices using the same QR code.

What is the maximum number of MFA secret code attempts, and will the user account be locked after multiple failed MFA code attempts?

The account will not be locked after failed attempts. However, after three attempts, the user must log in with their username and password again for authentication.

When modifying an MFA configuration, how long does it take before the changes made by an administrator take effect?

There could be a delay of up to 15 minutes due to various caching mechanisms before the new MFA configuration takes effect.

What should a user do if they must log in with MFA, but the MFA code does not work, or the mobile device is no longer available?

The user must contact the CSX administrator through an offline process such as email or an internal ticketing system. The CSX administrator has two options:

- Remove the device from the user so the user must register a new device as part of the first-time login process.
- Add the user to the individual exception list for a certain period so the user does not need to log in with MFA temporarily and can replace the device in My Account.

Is it possible to restore a device using the Secret Unique Key?

Yes. Regardless of whether a user has registered the MFA device using a QR code or manually using the secret unique key, the user can store the unique key securely.

If a user loses access to the authentication app, they can use the secret key to register a new device and regain access to their account.

If MFA is enabled for all users, is there any impact on service accounts used for integrations and APIs?

No. There is no impact. MFA affects the standard login process but does not impact any existing integration via APIs.

Is it possible to authorize a single authentication application? For example, can my organization authorize users to use only Authentication App 1 but block Authentication App 2 and 3?

The CSX MFA solution supports the TOTP algorithm, which many applications support. There is no way to authorize or block specific TOTP applications. However, customers can create and point to a custom MFA online help page with clear instructions to end users on which authentication applications should be used following your corporate policies.

The "skip on subsequent logins" feature defaults to 24 hours. Is this configurable?

No. The default is 24 hours, and this is not configurable.

Glossary

- 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.
- 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: entering a username and password confirming the one-time passcode generated by the software token.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Core Features Activation	Grants ability to manage Core Feature Activation Preferences in which administrators can enable and disable certain features. 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 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 Authentication Preferences - Manage	Grants the ability to view and configure Multi-factor Authentication (MFA) preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
MFA Authentication Preferences - View	Grants the ability to view the Multi-factor Authentication (MFA) preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration

Feature Activation Preferences - Activate Multi-Factor Authentication (MFA)

The Core Feature Activation Preferences page enables administrators to activate and deactivate certain functionality within their portal. With this release, administrators can activate Multi-factor Authentication.

The Feature Activation Preferences in Core Preferences is only available if activation preferences are available. After Multi-factor Authentication is enabled, this page may only be available once another feature is available for activation in the future.

Multi-factor authentication (MFA) is a method in which users must verify their identity in multiple ways to log in to the system, such as user name, password, and authentication code.

MFA is ready for testing as of February 29.

To access Feature Activation Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > FEATURE ACTIVATION PREFERENCES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Core Features Activation	Grants ability to manage Core Feature Activation Preferences in which administrators can enable and disable certain features. This permission cannot be constrained. This is an administrator permission.	Core Administration

MFA (Multi-factor Authentication) Configuration

Administrators can configure how multi-factor authentication is configured within their organization.

Multi-factor authentication (MFA) is a method in which users must verify their identity in multiple ways to log in to the system, such as user name, password, and authentication code.

MFA is ready for testing as of February 29.

To access MFA Configuration, go to ADMIN > TOOLS > CORE FUNCTIONS > MULTI-FACTOR AUTHENTICATION.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
MFA Authentication Preferences - Manage	Grants the ability to view and configure Multi-factor Authentication (MFA) preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
MFA Authentication Preferences - View	Grants the ability to view the Multi-factor Authentication (MFA) preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration

MFA Configuration

Multi-Factor Authentication (MFA) is a security mechanism used to verify the identity of a user by requiring the presentation of multiple factors before granting access to the portal. To authenticate with MFA, the user must provide a second factor during the login process. When logging into an account, the user need to enter a username/password and a one-time code from their registered device to gain access.

1. General Settings

1.1. Online Help Link

Customized Help URL, visible for end users while logging in with MFA. If empty, the link will point to the default Cornerstone Online help.

Help Link Url

1.2. Skip the Multi-Factor Authentication on Subsequent Logins

☐ The setting allows skipping the multi-factor authentication on subsequent logins. The expiration time for skipping Multi-Factor Authentication is 1440 minutes (1 day).

2. Organizational Units and Users

There are two sections that control how OUs and users are configured to be required to login with MFA: "2.1 Include" and "2.2 Exclude". It is important to note that the second section (Exclude) takes precedence over the first section (Include). Please check out the Online Help for more information and examples.

2.1. Include Organizational Units and Users

☐ All users are required to login with MFA. If you select this option, it is no longer necessary to configure any individual OUs or users.

Individual OUs and Users

Select OUs or users who are required to login with MFA. Note that a selected OU always includes all child OUs. A user needs to belong to one of the selected OUs to be considered.

Max. number of OUs: 40
Max. number of Users: 100

ORGANIZATION UNITS (OU)   USERS

Add OUs

2.2. Exclude Organizational Units and Users

Select OUs or users who should be excluded from being required to login with MFA. The OUs and users listed here have precedence over the first section, where OUs and users can be added. Note that a selected OU does always include all child OUs. A user needs to belong to one of the selected OUs to be considered. Please check out the Online help for more information and examples.

Max. number of OUs: 10
Max. number of Users: 100

ORGANIZATION UNITS (OU)   USERS

Add OUs

Cancel   Save

General Settings - Online Help Link

When users log in, and MFA is enabled, a Help link is available on the page. By default, this link opens Cornerstone's Online Help for this functionality. However, organizations may prefer to create a customized support page with specific, company-related help and instructions for users in their organization.

If your organization has created a customized support page to help users log in with multi-factor authentication, enter the URL for that page in this field.

General Settings - Skip the Multi-Factor Authentication on Subsequent Logins

The setting allows users to skip the multi-factor authentication on subsequent logins. The expiration time for this setting is 24 hours by default.

If this setting is enabled, users will see the Multi-Factor Authentication screen only for the first login attempt. After successfully logging in, the Multi-Factor Authentication screen will be bypassed for one day.

Include and Exclude Organizational Units and Users

Two sections control which organizational units (OUs) and users must log in with MFA: the *Include Organizational Units and Users* and *Exclude Organizational Units and Users* sections. The *Exclude Organizational Units and Users* section takes precedence, meaning that if a user is included in both sections, they are not required to log in with MFA.

Administrators may select the **All users are required to login with MFA** option. When this option is selected, administrators may still add users or OUs to the Exclude section since the Exclude section takes precedence.

Otherwise, administrators can select the **Organization Units (OU)** and **Users** tabs in each section to choose which OUs and users must log in with MFA. All child OUs are included by default when an OU is selected.

To avoid latency when logging in to the system, the maximum number of configurable OUs and users is limited:

- Maximum number of Organizational Units (OUs) to Include - 40
- Maximum number of Organizational Units (OUs) to Exclude - 10
- Maximum number of individual users to Include - 100
- Maximum number of individual users to Exclude - 100

Important: When adding new OUs in the MFA Configuration page, all previously selected OUs needs to be re-selected, otherwise they will be removed from the list. This will be improved with the July release.

Disable MFA for a User Account

Administrators with appropriate permissions can disable Multi-factor Authentication (MFA) for a specific User record. This can be helpful to allow a user to log in for a short time without MFA and re-register their device.

To disable MFA for a specific user, an administrator can open the MFA Preferences and add the user to the list of users in the Exclude Organizational Units and Users section.

To access MFA Configuration, go to ADMIN > TOOLS > CORE FUNCTIONS > MULTI-FACTOR AUTHENTICATION.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
MFA Authentication Preferences - Manage	Grants the ability to view and configure Multi-factor Authentication (MFA) preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration

Login Report - MFA Login Method

The Login Report enables organizations to report which users have logged in to the portal using multi-factor authentication (MFA) and when. Organizations may need to provide this information to auditors.

Select MFA as a Login Method filter to process the report.

To access the Login Report, go to REPORTS > STANDARD REPORTS. From the System tab, select the **Login Report** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Login Report	Grants access to the Login Report, which enables organizations to report which users have logged in to the portal and when. This permission cannot be constrained.	Reports - System

Report Criteria

View which user has logged in when. The maximum number of rows is 100,000.

USER CRITERIA

User Criteria: Select Criteria

DATE FILTERS

Date Criteria: Last Month   From: 9/1/2023   To: 9/30/2023

ADVANCED FILTERS

Login Method: MFA

User Status: ☐ Include Inactive Users

PROCESS REPORT

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

Process Report

User Record - Remove MFA Device

Administrators with appropriate permissions can remove an existing mobile device from a User record.

This may be necessary if a user cannot log in anymore because the existing registered mobile device is broken or unavailable. After the administrator removes the mobile device, the user can register a new one as part of the initial login process.

To access the User Records Administration page, go to ADMIN > TOOLS > CORE FUNCTIONS > USERS.

To view or remove a user's registered Multi-factor Authentication device, select the Options drop-down and select the MFA option for the user.

Permissions

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 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

Multi-Factor Authentication Device

×

> ❶ Following the company policy, multi-factor authentication is required for this user account. Only one device can be active for an account.

Registered Device

🔒 Last Updated : 11/15/2023 2:48 AM

Cancel   **Delete**

Multi-factor Authentication - End User Experience

If a user is required to log in with Multi-factor Authentication (MFA), they need to have a mobile device, such as a smartphone, with a Time-based One-time Password (TOTP)-compatible virtual authenticator application installed to log in to the Cornerstone CSX platform.

Register New Device

Users can register a new mobile device in two different ways: in My Account or during the initial Login Process after MFA has been enabled for a user account.

1. My Account - This option is available to all users of an MFA-enabled portal. *See* **My Account - Register New Device** on page 93 *for additional information.*
2. Login Process - This option is available and mandatory to all users who must log in with MFA but have not yet registered a device. *See* **Login Process - Register New Device** on page 96 *for additional information.*

My Account - Register New Device

In My Account, users can register a new device or delete or replace an existing device. In a Multi-factor Authentication (MFA)-enabled portal, any user can register an MFA device, even if the user is not yet required to log in with MFA.

To access My Account:

- Select the Settings icon ⚙ in the screen's upper-right corner and select the **My Account** link.
- Select the Navigation icon in the screen's upper-right corner and select the **My Account** link.

Select the MFA tab on the left. Select the **ADD DEVICE** button to register a device.

Note: *The MFA tab only displays when the system administrator enables MFA.*

Users can register a device in two ways:

- QR Code - *See* **Register an MFA Device with a QR Code** on page 97 *for additional information.*
- Secret Unique Key - *See* **Register an MFA Device with a Secret Unique Key** on page 98 *for additional information.*

Preferences

MFA
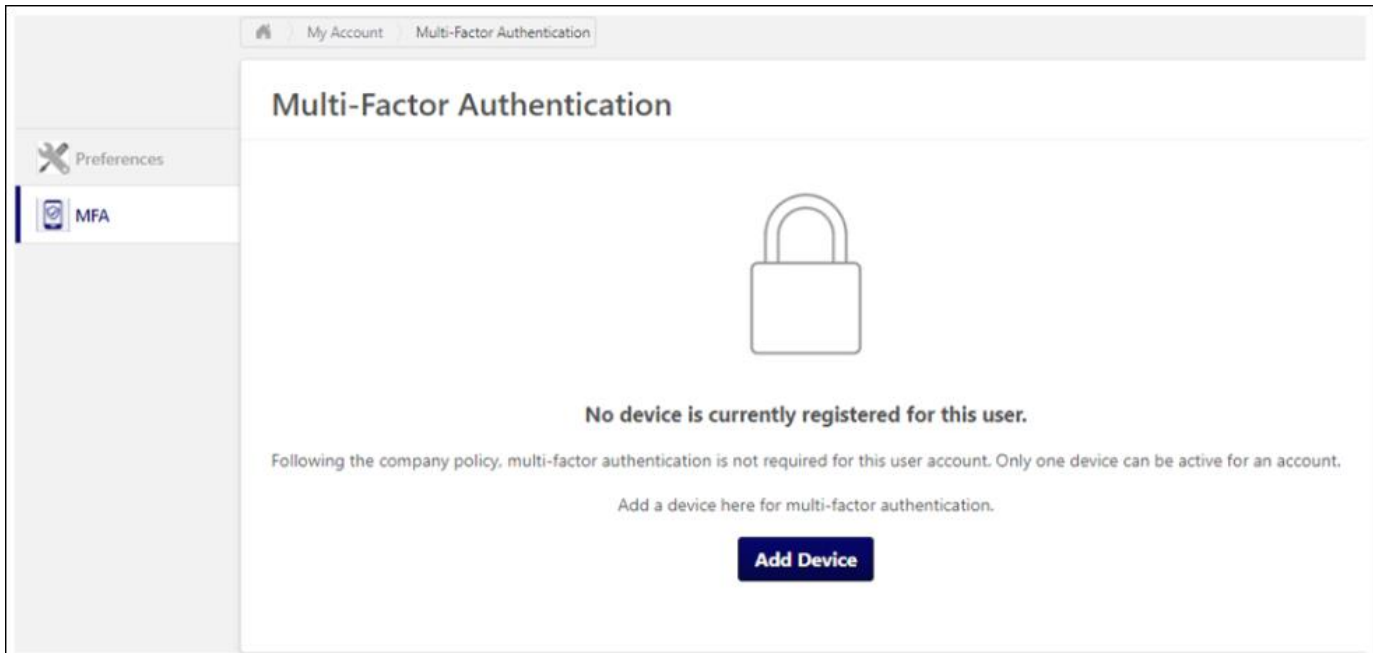
Multi-Factor Authentication

ⓘ Following the company policy, multi-factor authentication is not required for this user account. Only one device can be active for an account.

Registered Device
Last Updated : 10/27/2023 1:20 AM

Delete   Replace

Replace a Multi-factor Authentication Device

A Multi-factor Authentication (MFA) device can be replaced in two ways, depending on whether the previous mobile device is still available and working:

1. The mobile device is still available and working - The user logs in with MFA and replaces the device in My Account. *See* **My Account - Register New Device** on page 93 *for additional information.*
2. The mobile device is not available or not functional - The user contacts the CSX administrator outside the CSX system, such as via email or an internal ticketing system, to remove the existing mobile device from the user account. After the administrator has removed the device, the user can register a new mobile device as part of the login process.
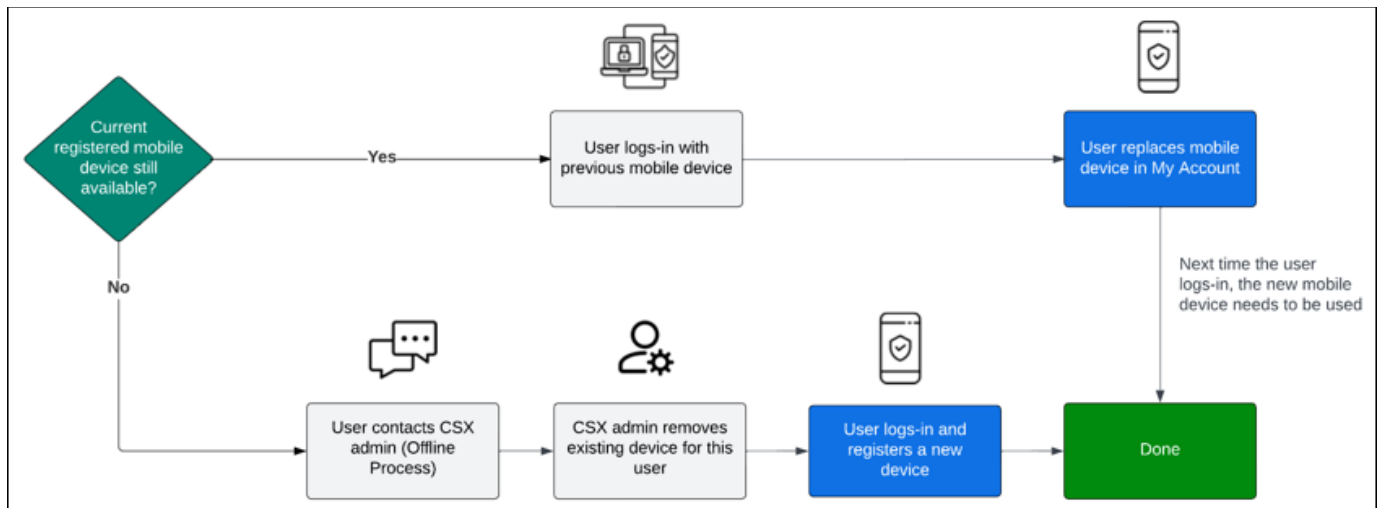
Login Process - Register New Device

The option to register a new Multi-factor Authentication (MFA) device as part of the login process is available and mandatory for all users who are required to log in with MFA but who have not yet registered a device.

If the following conditions are met, an MFA device must be registered as part of the first-time login process:

1. MFA has been activated for a user by the CSX administrator in the portal's Multi-factor Authentication Configuration. *See* **MFA (Multi-factor Authentication) Configuration** on page 85 *for additional information.*
2. The user still needs to register an MFA device.

Users can register a device in two ways:

- QR Code - *See* **Register an MFA Device with a QR Code** on page 97 *for additional information.*
- Secret Unique Key - *See* **Register an MFA Device with a Secret Unique Key** on page 98 *for additional information.*

Register an MFA Device with a QR Code

QR codes are the most convenient way to register a device for multi-factor authentication (MFA).

Steps to register a device with a QR Code

1. On your smartphone, open the virtual authenticator app.
2. In the app, select the option to add an account or scan a QR code.
3. Use your smartphone's camera to scan the QR code on your computer screen. The app will automatically recognize the code and add the account.
4. After adding the account to your virtual authenticator app, the app will generate a one-time code. Enter this code into the Cornerstone MFA page to verify the setup and confirm that the virtual authenticator app is correctly set up.
5. Once verified, your MFA device is active. Now, each time you log in to your account, you must open your virtual authenticator app to generate a temporary code to complete the login process. *See* **Login Process - Log in Using Multi-factor Authentication** *for additional information.*

Register an MFA Device with a Secret Unique Key

Users can use a secret unique key to register their device for multi-factor authentication (MFA).

Steps to register a device with a secret unique key

1. On your smartphone, open the virtual authenticator app.
2. In the app, select the "Add Account" or "Manual Entry" option. This may vary depending on the app.
3. Enter a name or label for the account.
4. Enter the secret key from the Cornerstone MFA page. This will be a random sequence of characters and numbers, such as Q5DADUPKCKOPK6JVJQOZMIVZ7FXHUAYE.
5. The app will recognize the secret code and add the account.
6. After adding the account to your virtual authenticator app, the app will generate a one-time code. Enter this code into the Cornerstone MFA page to verify the setup and confirm that the virtual authenticator app is correctly set up.
7. Once verified, your MFA device is active. Now, each time you log in to your account, you must open your virtual authenticator app to generate a temporary code to complete the login process. *See* **Login Process - Log in Using Multi-factor Authentication** on page 100 *for additional information.*

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Multi-Factor Authentication

Multi-factor authentication has been enabled for your account. Please, open your company's authentication app to scan a QR code.

Scan the QR code and enter the code into the field below.

If the QR code does not work enter the key below into the authentication app.

OR

Q5DADUPKCKOPK6JVJQ
OZMIVZ7FXHUAYE

* Enter MFA Code

Help   Cancel   Register

Login Process - Log in Using Multi-factor Authentication

After the user's username and password are successfully verified and the user has registered a Multi-factor Authentication (MFA) device, they must enter the random and temporary 6-digit number from the virtual authenticator app on their registered device to log in to the Cornerstone portal.

When available, the MFA login page uses the organization's corporate branding from the custom login page.

Overwrite Settings Guardrail

With this enhancement, when an administrator attempts to save the configuration for the following Core Preferences pages, a pop-up warning message is displayed if the **Overwrite custom settings** checkbox is selected:

- Login Message
- Navigation Tabs and Links
- Welcome Page

Administrators can select **OK** to overwrite custom settings for child OUs or **CANCEL** to cancel the action and return to the preferences page.

This helps prevent inadvertent changes if the **Overwrite custom settings** checkbox is selected unintentionally. If this setting is selected in error, recovering previous configurations is difficult and time-consuming to fix.

Implementation
This functionality is automatically enabled for all organizations.

Permissions
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Log In Message - Manage	Grants access to create a message that appears upon portal login to all users or a selected group/subset of users. This is an administrator permission. This permission can be constrained by OU and User's OU.	Core Administration
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.	Core Administration

| Welcome Page Preferences - Manage | Grants ability to configure the look and feel of the Welcome Page that users see upon logging in to the portal. This permission can be constrained by OU and User's OU. This is an administrator permission. | Core Administration |

Security Permission to Bypass Required Group Preview

When the Group Preview functionality is enabled, organizations can make it mandatory for administrators to generate a group preview before they can save any edits to the group.

With this enhancement, Cornerstone has added a *Bypass Required Group Preview* permission. When the Group Preview functionality is enabled and the **Require Preview Before Saving Edits** toggle is enabled in Group Preferences, administrators with this permission can save edits to a Group or publish a draft without generating a preview. Administrators who have this permission and attempt to save a Group without generating a preview will see a confirmation pop-up.

Frequently Asked Questions (FAQs)

Can administrators with the *Bypass Required Group Preview* permission still generate a preview?

Yes, administrators can always choose to generate a preview. For those with this permission, it is optional.

Are users in the default System Administrator role ever required to generate a preview?

No. Because the *Bypass Required Group Preview* permission is in the default System Administrator role by default, users in this role will never be required to generate a preview. Customers who want this permission removed completely should open a case with Global Customer Support (GCS).

Implementation

This functionality is automatically enabled for all organizations. Upon release, the new *Bypass Required Group Preview* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bypass Required Group Preview	When the Group Preview functionality is enabled and the **Require Preview Before Saving Edits** toggle is enabled in Group Preferences, administrators with this permission can save edits to a Group or publish a draft without generating a preview. Administrators with this permission still have the option to generate a preview. This permission cannot be constrained. This is an administrator permission.	Core Administration

The following existing 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

Third-Party Cookies Access Deprecation in Google Chrome and Firefox Browsers

Google is planning to end third-party cookies for Chrome users in 2024. In Q1 2024, Chrome is beginning to phase out third-party cookies access to approximately 1% of its users, with up to 100% phase out planned for Q3 2024 and beyond. Firefox browser has already been restricting third-party cookies access in its default settings.

What are third-party cookies and how are they used?

They are cookies in a user's browser which are from a domain other than the one the user is currently on. They are primarily used for tracking and targeting users with advertisements, but they are also used for seamless transitioning of users between sites.

Impacts on Cornerstone applications

Unless steps are taken on the customer side, this deprecation can be disruptive to existing features that were previously acceptable such as content progress tracking with third party vendors, custom pages and features like CSX Welcome and Login pages, and facilitating integrations between sites (e.g. LXP integration between CSX and Edcast).

Customer action is required

Due to these new third-party cookie enhancements in Chrome and Firefox, customer action is required to prevent disruption of functionality in Cornerstone's platforms. Customers should partner with their IT teams to review the deprecation's potential impact and implement a corrective course of action.

Cornerstone is recommending the following approach

Customers should configure the browser privacy preference for Google Chrome and Firefox to allow their Cornerstone hostname(s) and necessary third-party domains/sites in users' browsers to access third-party cookies. This allows customers to control the domains/sites they want to allow and provides users with a seamless experience. This requires customer effort to configure their users' machines.

Chrome - when this feature is enabled in Chrome at your organization, follow these instructions.

1. On Chrome press the three dots in the top right
2. Then go to Settings
3. In the Search
4. Go to Privacy and Security
5. Then Tracking Protection
6. Scroll down page and click Add next to Sites allowed to use Third-party cookies
7. In the pop up enter one or more of the following:
    1. [*.]csod.com
    2. [*.]edcast.com
    3. [*.]sabacloud.com

Firefox - you can specify which websites have Enhanced Tracking Protection turned off. Type the exact address of the site you want to manage and then click Add Exception.

1. On Firefox press the hamburger menu in the top right to open the application menu
2. Then go to Settings
3. On the left sidebar menu, click Privacy & Security

4. Under Enhanced Tracking Protection, click Manage Exceptions… to open the Exceptions for Enhanced Tracking Protection pop-up window
5. In the pop-up window enter your fully qualified Cornerstone domain name in the Address of website field (e.g., https://companya.csod.com)
    1. https://*<portalname>*.csod.com
    2. https://*<portalname>*.edcast.com
    3. https://*<portalname>*.sabacloud.com
6. Click Add Exception
7. Click Save Changes

Learn more
- Google
    - **https://blog.google/products/chrome/privacy-sandbox-tracking-protection/**
- Firefox
    - **https://support.mozilla.org/en-US/kb/enhanced-tracking-protection-firefox-desktop**
    - **https://support.mozilla.org/en-US/kb/third-party-cookies-firefox-tracking-protection**

User Record Custom Field Default Value

Previously, when administrators configured a default value for a user record custom field, the User Record page displayed the default value if no other value was explicitly selected for the user. This created confusion when reporting on the custom field because reporting would show a blank value for the user since there was no value for that field stored in the database.

With this enhancement, when administrators configure a default value for a user record custom field, the User Record page will not display the default value unless the value is explicitly selected for the user. This enhancement provides consistency between data displayed on the User Record page and the data output in reporting.

Frequently Asked Questions (FAQs)

Will the Modification History show that the custom field values were changed from the configured default values to blank values?

No. The Modification History will not show that the configured default values were changed or removed post-release since these default values are not stored in the database.

What options are available to keep the configured default values displayed on the User Record page?

You must explicitly change the user record custom field value for users to save these values in the database. To do this, you can either make the change on the User Record page or load the values using Edge Import.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users – View Custom Field Information	Grants ability to view the custom fields on a user record. Administrators are only able to view a custom field on a user's user record if the user is within their permission constraints and the administrator is within the availability of the custom field. This permission works in conjunction with the Users - View 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

Edge Import Enhancements

Edge Import - Deprecate Support for .XLS File Type with the November '24 Release

With the November '24 Release, Edge Import will no longer support uploading and processing files with an .xls extension (Microsoft Excel 97-2003).

Deprecation Milestones

March '24 Release

- Deprecation is announced.
- Customers can begin converting their load/feed files from .xls to .xlsx or other supported file types.

July '24 Release

- Warning message will appear in Edge Import when an .xls file is uploaded.
- Warning message will be displayed in the email notification if an .xls file is used.

November '24 Release

Import/feed files with .xls file extension will no longer be processed.

Edge Import - New Performance Load Type (Reviews Score Load)

A new Reviews Score load type enables administrators to upload or override the rating score for reviewees via Edge Import. This new load can be used for standard and off-cycle tasks. This new load type provides the ability to upload the rating score of reviewees in bulk for multiple tasks at a time without needing to submit a work order.

There is no limitation to the number of review steps or the kind of sections in a review step. The task status can be Not Started, In Progress, or Completed.

Implementation

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

This load type is not yet activated in Stage portals. It is expected to be available with the UAT 3 Stage deployment.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Import - Load Review Scores	Grants access to upload or override the rating score for reviewees via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - Organizational Unit (OU) Feed - Usability Enhancement

Previously, when a customer loaded multiple files to create and update an OU in a single data feed, the system created multiple OUs with the same ID. By limiting the number of OU files processed concurrently, organizations can create and update the same OU when loading multiple files in a data feed.

Implementation

This functionality is automatically enabled for existing Edge Import customers.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import Workflow - Cost Center	Grants access to the Cost Center organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Custom OU	Grants access to the Custom organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Division	Grants access to the Division organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Grade	Grants access to the Grade organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Legal Entity	Grants access to the Legal Entity organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Location	Grants access to the Location organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Position	Grants access to the Position organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

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

Edge Import Learning Loads - Additional Loads Support Feeds and Bulk API

With this release, the following load types support the loading of data via feeds and Bulk API:

- Event Transcript Update Load
- ILT Instructor Load
- Subjects Load

Implementation

This functionality is automatically enabled for existing Edge Import customers. The Template Guides in Edge Import will be updated to reflect this enhancement. New permissions control access to the new feeds and bulk APIs.

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

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Bulk API - LMS - Event Transcript Update	Grants ability to use the Bulk API to load event transcript update data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - ILT Instructors	Grants ability to use the Bulk API to load ILT instructor data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Subjects	Grants ability to use the Bulk API to load subject data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access LMS - Event Transcript Update Feed	Grants access to the Event Transcript Update data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Access LMS - ILT Instructors Feed	Grants access to the ILT Instructors data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Subjects Feed	Grants access to the Subjects data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import Learning Loads - New Optional Fields

With this enhancement, new optional fields are available for Edge Import learning loads.

NEWLY SUPPORTED OPTIONAL FIELD	SUPPORTED LOAD TYPES
Exclude from Course Recommendation • Type: Boolean • Default Value: False	• Curriculum • ILT Events • LO Catalog Update • Material • Online Course Metadata • Online Content (OLCO) Metadata • Test • Video

Training Purpose
 	
• Acceptable Values:
    • Learning Object loads - This field accepts active training purposes as configured in Learning Preferences.
    • Transcript loads - This field accepts active training purposes as configured for the learning object.
• Default Value: No default
	• Curriculum
	• Curriculum Transcript
	• Event Transcript Update
	• ILT Events
	• LO Catalog Update
	• Material
	• Material Transcript
	• Online Course Metadata
	• Online Course Transcript
	• Online Content (OLCO) Content Metadata
	• Online Content (OLCO) Transcript
	• Test
	• Test Transcript
	• Video
	• Video transcript

Training ID • Type: Text • Acceptable Values: • New training ID value	• LO Catalog Update

NEWLY SUPPORTED OPTIONAL FIELD	SUPPORTED LOAD TYPES
- DELETE - Default Value: No default - New Permission: Edge Import Learning - Modify Training ID	
Keywords - Type: Text - Field Format: Accepts multiple values separated by a comma or semicolon - Default Value: No default	Test
Training Hours - Type: Text - Field Format: HHHH:MM:SS - Default Value: No default	Test
Do not allow exception request - Type: Boolean - Default Value: False	ILT Sessions
Display Times in Timezone of User - Type: Boolean - Default Value: - ILT Session loads - Use Event - ILT Session Parts - Use Session	- ILT Event Load (existing) - ILT Sessions - ILT Session Parts
Copy Availability to New Sessions - Type: Boolean - Default Value: True When this value is true for an event, then the following occurs for new sessions created for the event: - If Availability-related fields have values in the ILT Session load file, the session inherits the event's availability. This availability is appended to the Availability-related fields in the ILT Session load file.	ILT Events

NEWLY SUPPORTED OPTIONAL FIELD	SUPPORTED LOAD TYPES
• If Availability-related fields do not have values in the ILT Session load file or are not mapped in the configuration, the session inherits the event's availability. • If Availability to All Users = True, then this overrides all existing availability criteria from the event and any other Availability-related fields included in the ILT Session load file. Exclusion: This field has no impact on the LO Availability load as it updates existing session availability, not new sessions.	
Copy Availability from its Event • Type: Boolean • Default Value: False When this value is True for a session, then the following occurs for existing sessions updated for the event: • If Availability-related fields have values in the ILT Session load file, the session inherits the event's availability. This availability is appended to the Availability-related fields included in the ILT Session load file. • If Availability-related fields do not have values in the ILT Session load file or are not mapped in the configuration, the session inherits the event's availability. • If Availability to All Users = True, then this overrides all existing availability criteria from the event and any other Availability-related fields included in the ILT Session load file. This field is ignored for any new sessions created from the ILT Sessions load. The load respects the Copy Availability to New Sessions value configured for the event. Exclusion: This field has no impact on the LO Availability load.	• ILT Sessions

Implementation

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

Upon release, the new *Edge Import Learning - Modify Training ID* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Edge Import Learning - Modify Training ID	Grants the ability to modify the "Training ID" 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 Learning Loads - Usability Enhancements

With this release, updates have been made to existing data loads to support more customer use cases and recent enhancements.

Online Content (OLCO) Transcript - Support Failed Status

The Online Content (OLCO) Transcript load now supports the Failed transcript status if your organization has activated the Failed status for Online Classes. Customers must contact Global Customer Support to enable the Failed status for OLCO.

Transcript statuses can be changed from the following statuses to Failed:

- Approved
- Registered
- In Progress
- Approved/Past Due
- Registered/Past Due
- In Progress/Past Due

Transcript statuses can be changed from Failed to Completed.

When the Transcript Status is imported as Failed, the Passed field value in Reporting 2.0 is "No." When the Transcript Status is imported as Completed, the Passed field value in Reporting 2.0 is "Yes."

ILT Loads - Instructor Field Enhancements

The following enhancements are made to the ILT Instructor load:

- The Instructor ID field now accepts Username values for internal instructors and GUID for external or internal instructors created in the CSX system.
- The Home Location field is optional. It is only required when creating a new instructor.
- The load can be used to create the same internal instructor for multiple providers in the same file. Unique records are a combination of Instructor ID and Provider.

The Preferred Instructor ID field in the ILT Events load now accepts Username and GUID.

The Part Instructor ID field in the ILT Session and ILT Session Parts loads now accepts Username and GUID.

ILT Sessions Load - Vendor/Provider Field Enhancement

In the ILT Sessions load, the Vendor/Provider field is enhanced to allow for updating the vendor for existing sessions. The Vendor/Provider field can now be updated for an existing session, and the Part Instructor must belong to the new Vendor/Provider. The Vendor/Provider field description in the template guide is updated to reflect this change.

Previously, organizations had to request a work order to update the Vendor/Provider for existing sessions.

ILT Loads - How is the Session ID Provided?

In the ILT Sessions and ILT Session Parts loads, the "How is the Session ID provided?" question contains a new "Session Learning Object ID" option.

In the ILT Transcript load, the "How is the Session ID provided?" question contains a new "Session Locator Number" option.

Transcript Loads - Comments Field is Conditionally Required

For the following Transcript loads, the Comments field is now only required when creating a load configuration in which the Due Date field is mapped:

- Curriculum Transcript
- Event Transcript Update
- Material Transcript
- Online Content (OLCO) Transcript
- Online Course Transcript
- Test Transcript
- Video Transcript

For existing saved configurations, when the Due Date field is mapped and the Comments field is not mapped, the configurations continue to function as previously.

Transcript Loads - Support Auto-resolution

Edge Import supports automatic resolution for a transcript load and its corresponding transcript custom field loads in a feed setting to be able to import the transcript and its custom fields in a single feed run.

For example, if an organization has a Material Transcript and Material Transcript Custom Field feed scheduled to run at 5 PM, the feed automatically resolves the data dependency between both files. The feed creates new transcript records and updates custom fields in the same feed run.

This functionality is added for the following load-type pairs:

- Curriculum Transcript and Curriculum Transcript Custom Fields
- ILT Transcript and Session Transcript Custom Fields
- Material Transcript and Material Transcript Custom Fields
- Online Content (OLCO) Transcript and Online Content (OLCO) Transcript Custom Fields
- Online Course Transcript and Online Course Transcript Custom Fields
- Test Transcript and Test Transcript Custom Fields
- Video Transcript and Video Transcript Custom Fields

Format Enhancement - Multiple Field Values

Most fields that accept multiple values can now separate values by a semicolon or a comma. This impacts fields such as Available Language, Keywords, and Subject IDs. Template guides are updated for the impacted fields.

This impacts the following load types:

- Curriculum
- ILT Event
- Material
- Online Content (OLCO) Metadata
- Online Course Metadata
- Test

- Video

Implementation

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

Core/General - Extended Enterprise
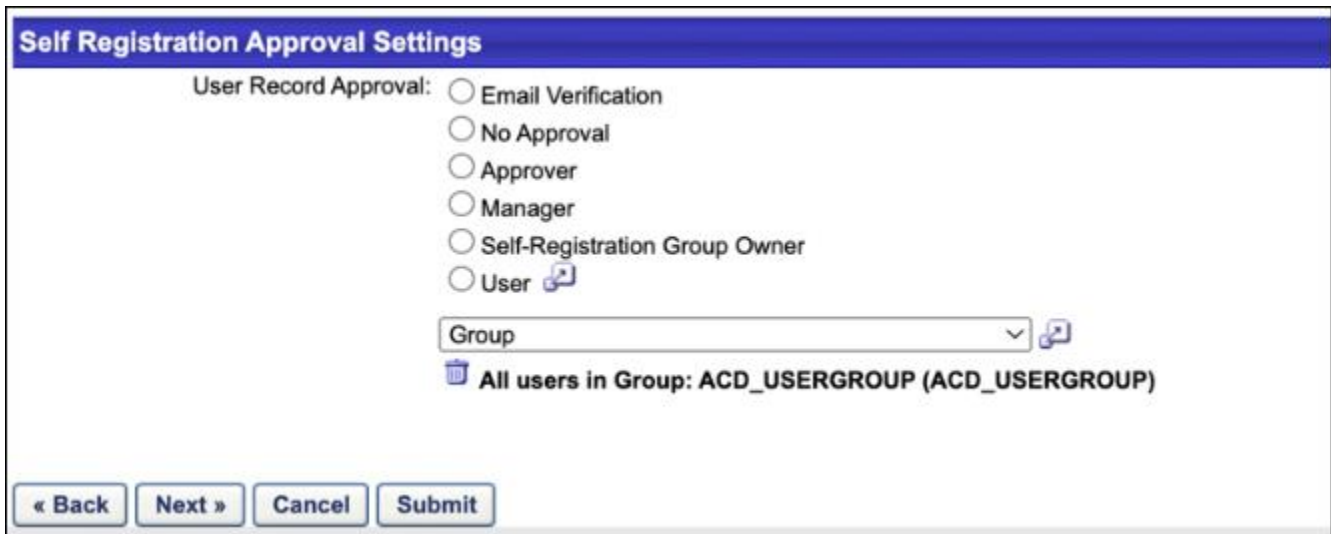
Self Registration - Ability to Add Multiple Approvers

Administrators can now include multiple approvers for self-registration groups, reducing the risk of prolonged approval delays if any requests go unaddressed in the self-registration functionality.

Administrators must first create a group that contains the approvers to add multiple user record approvers to a self-registration group. Administrators can now select the group when setting the user record approvers on the Self Registration Approval Settings step.

When a user self-registers for the portal, all approvers receive the approval request in their inbox and an email to approve the record. Any approver can approve the record, and the request is removed from all approvers' pending request queue once it is approved.

To create a self-registration group, go to ADMIN > TOOLS > CORE FUNCTIONS > ORGANIZATIONAL UNITS > MANAGE SELF REGISTRATION GROUPS. Then, click the **Create New Self Registration Group** link.

Considerations

- Administrators can select static or dynamic groups, but Cornerstone recommends using static groups to ensure the correct users are included.
- Customers must add and remove users from their group of approvers as needed.
- Administrators can select only one group per self-registration link.
- Approval workflows are out of the scope of this enhancement.

Frequently Asked Questions (FAQs)

Is the rest of the Self Registration process the same?

The rest of the Self Registration process, apart from the multiple approval configuration, is unchanged.

Will all approvers receive the request and an email?

All approvers will receive the request in their inbox and an email to approve the pending user record. If any of the approvers approve the record, the pending request is removed from all approver's queues.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
OU Group - Manage	Grants the ability to create, copy, and edit custom groups of users without allowing the ability to manage organizational units (OUs). This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
Self Registration Groups - Manage	Grants ability to create and update/edit self-registration groups, which are configured to make a self-registration page available to people who are not added to the portal via user feed. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.	Core Administration

Integrations & APIs - Core/General

Ceridian Dayforce Core Data Inbound Integration

The new Ceridian Dayforce Core Inbound Data Integration is a flexible unidirectional sync to load the user and organizational unit (OU) data from Dayforce to Cornerstone CSX portals. This integration provides access to real-time User and OU data in Cornerstone and Ceridian Dayforce. This integration can pave the way for upcoming solutions between Cornerstone and Ceridian Dayforce.

This integration includes the following features:

- Facilitates User and OU sync from Ceridian Dayforce to the Cornerstone CSX portal by providing configuration details
- Provides options to run on Full or Delta mode
- Supports sync of User, OU, or both
- User-friendly OU mapping
- Email notification with a summary after the sync

Frequently Asked Questions (FAQs)

Can the scheduled run time be modified?

The integration run time is currently not configurable.

I've copied the configurations from my Pilot environment. Why did the integration fail in production when it worked on the Pilot environment?

Each environment is assigned a unique "Username" and "Password." Be sure to use the correct values.

How can I ensure no duplicate records are created in my Cornerstone portal?

The integration compares existing User and OU IDs in the Cornerstone portal with the Xrefcode ID in the Ceridian Dayforce portal to update records in Cornerstone. This prevents any duplicate records from being added.

Does the integration support future terminations?

The integration currently does not support future termination.

Implementation

Enablement is a two-step process:

1. Customers should contact their Ceridian Dayforce team to enable the Cornerstone Data Connector on their Dayforce Portal. Customers should receive a client ID and client secret details from the Dayforce team to configure the Integration in their Cornerstone portal.
2. Purchase the integration in Edge Marketplace in Cornerstone.

SOAP Transcript API (LOWS.asmx) will be Deprecated with the November '24 Release

Cornerstone's SOAP Transcript API (/webservices/LMS/LOWS.asmx) will be deprecated with the November '24 Release. This will impact only a subset of API customers.

Customers are encouraged to consult with their local IT team who may have created an integration with Cornerstone using SOAP Transcript APIs. Customers who are impacted by this upcoming change will need to take action prior to this deprecation.

In preparation for the phase out of the Transcript SOAP API (LOWS.asmx), Cornerstone created a guide to help customers migrate integrations from SOAP APIs to the newer REST APIs. REST API are much more secure, flexible, and easier to use.

Mobile Enhancements

Align Your Goals From the Cornerstone CSX App

Goal alignment ensures that all employees in a team, division, or organization are working towards common goals. With the March '24 Release, goal alignment is possible using the Cornerstone app. This improves the alignment of goals by ensuring that users can easily connect their goals to parent goals that they directly support.

This enhancement includes the following features:

- Align a goal with a parent goal
- Allow managers to create aligned goals for team members
- View goal hierarchy
- Contribute towards parent goal progress

This functionality is not available during UAT.

Create Goal - Align

When creating a goal, an Align option is now available. This option provides users with a streamlined process to align their goals with parent goals. Managers can create aligned goals for team members.

When aligning a goal, users can view detailed information about a parent goal within the Goal Details by selecting the goal in the goal list.

After selecting a parent goal, an Alignment Confirmation screen prompts the user to confirm and save the alignment.

Users can select the Goal Overwrite option during goal alignment. When the user selects this option, the child goal settings can be overridden or adjusted after alignment with the parent goal, ensuring flexibility in goal management.
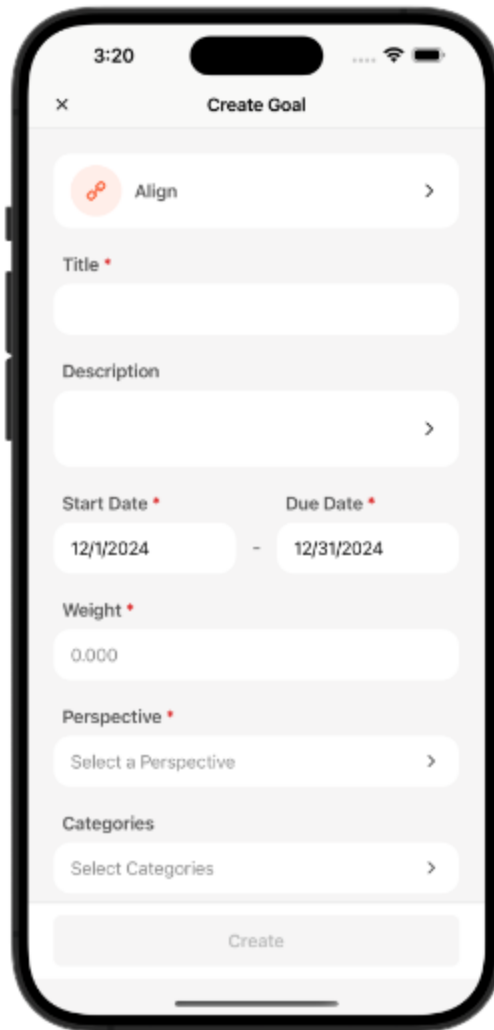
Goal Details - View Alignment

The goal hierarchy is displayed when viewing the Goal Details for an aligned goal.
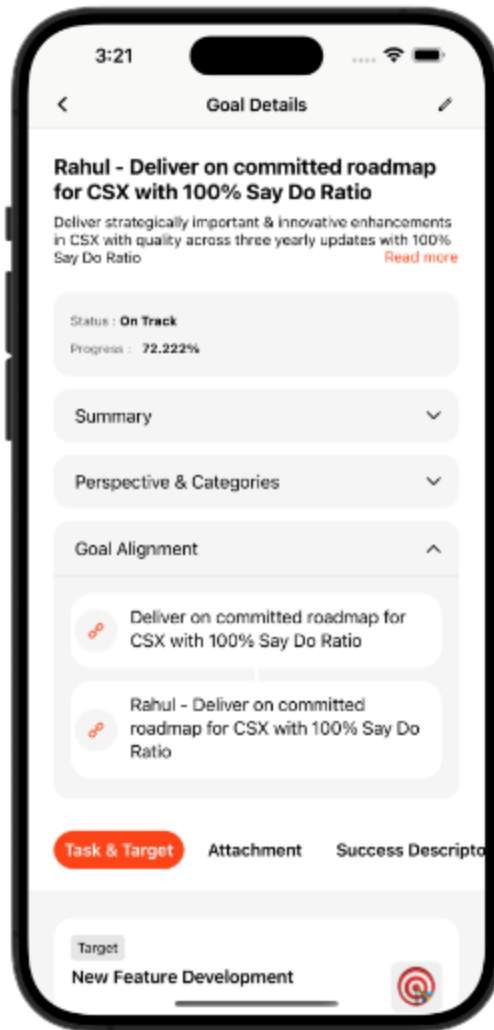
Edit Goal - Edit or Remove Alignment

When editing a goal, users can edit or remove the alignment.
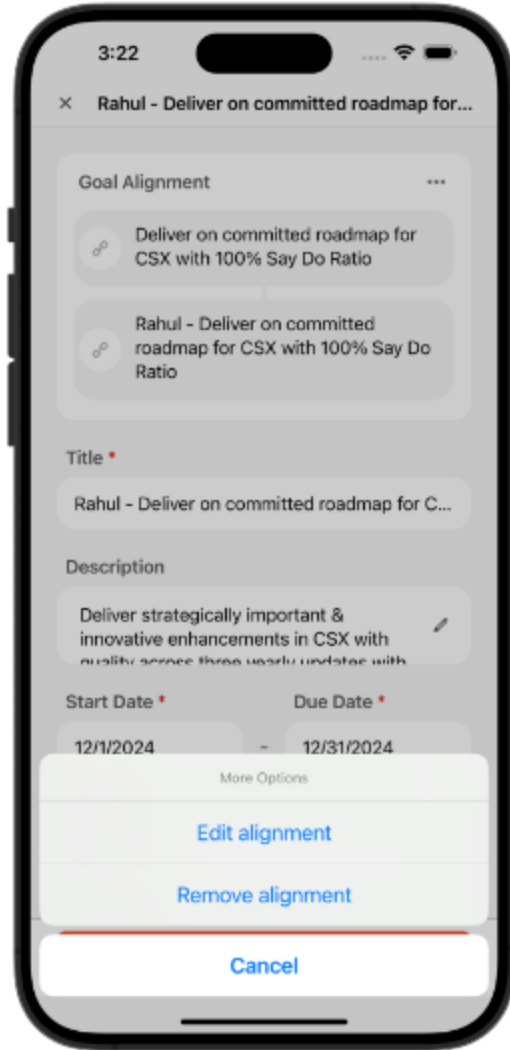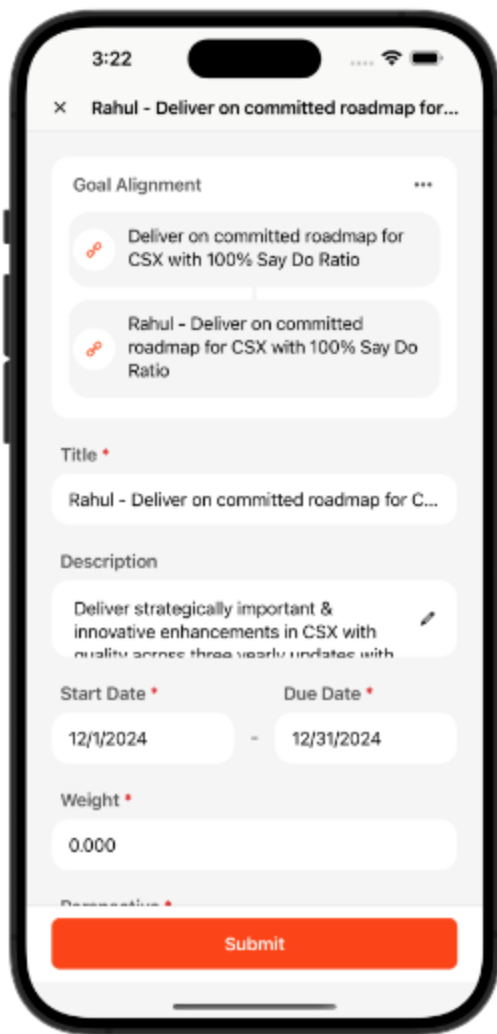
Implementation

This functionality is automatically enabled in app versions after the March '24 Release. If the apps on a user's device are configured to auto-update, no action is required from the user to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from either the Apple Store or the Google Play store.

Cornerstone CSX App enhancements are available with a delay after the release. Depending on your time zone, enhancements may be available in app stores on March 25 (based on US time zones).

This functionality is not available during UAT.

Observation Checklists in Cornerstone CSX App

With the March '24 Release, The Cornerstone CSX App now includes an Observation Checklist feature. This marks a significant advancement in our app, facilitating seamless assessments and accessing employees' skills and competencies, even in remote locations with limited or no internet connectivity. This enhancement empowers organizations to ensure comprehensive evaluation and documentation regardless of the working environment.

Changes to navigation paths, which offer a more organized, user-friendly interface, are also included in support of this new feature. A "More" menu is added to the navigation tray. Observation checklists can be accessed from this menu, along with other actions that were previously accessible from the User Profile. The user profile image is moved to the "More" menu and no longer has any clickable actions. The "Downloads" option is removed from the navigation tray to make room for the "More" menu, and it can now be accessed through the "My Learning" section.

This functionality is not available during UAT.

Offline Mode Support

- User Checklist Management and Checklist Summary Modules - Users can access Observation Checklists offline, including checklist items, criteria, descriptions, and attachments. This comprehensive offline access ensures that users have all necessary information readily available, even without an internet connection.
- Checklist Updates - Validators can update checklists, add notes, and revise assessments even offline. This feature ensures that assessments remain dynamic and up-to-date, regardless of the user's connectivity status.
- Offline Mode for Observation Checklists - Observation checklists can be utilized offline, allowing users to conduct assessments regardless of internet availability. The app automatically synchronizes offline checklist data with the central server once the user reestablishes an internet connection, ensuring data consistency and integrity.
- Offline Mode Indicator - Visual indicators in the app inform users when they are operating offline. The app provides clear guidance on syncing data once back online, ensuring a seamless transition between offline and online modes.

Checklists Page

The new Checklists page can be accessed by selecting the More menu and selecting Observation Checklists.
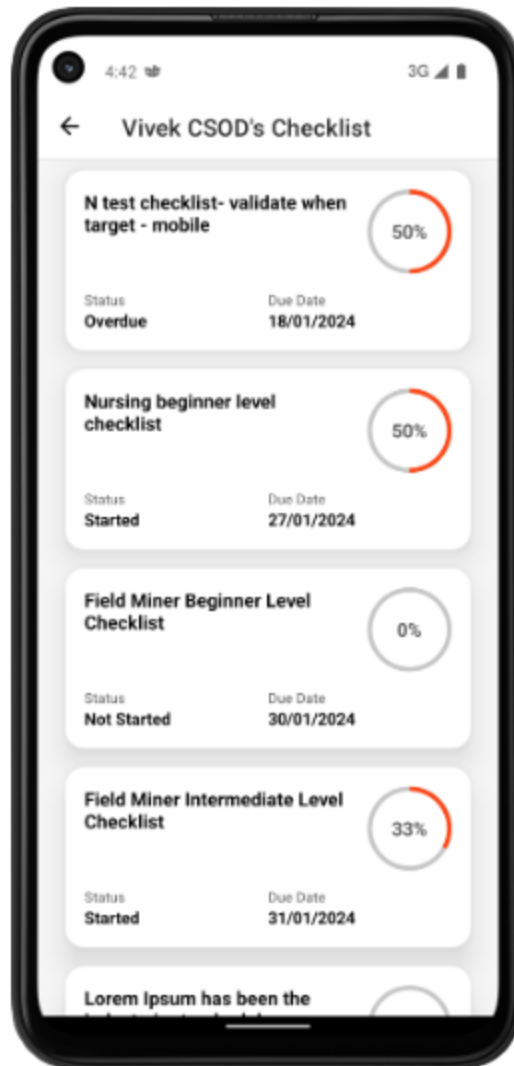
Checklist Details

When viewing the checklist details, observers can add observation notes from the Observation Notes tab or assess competencies from the Competencies tab.
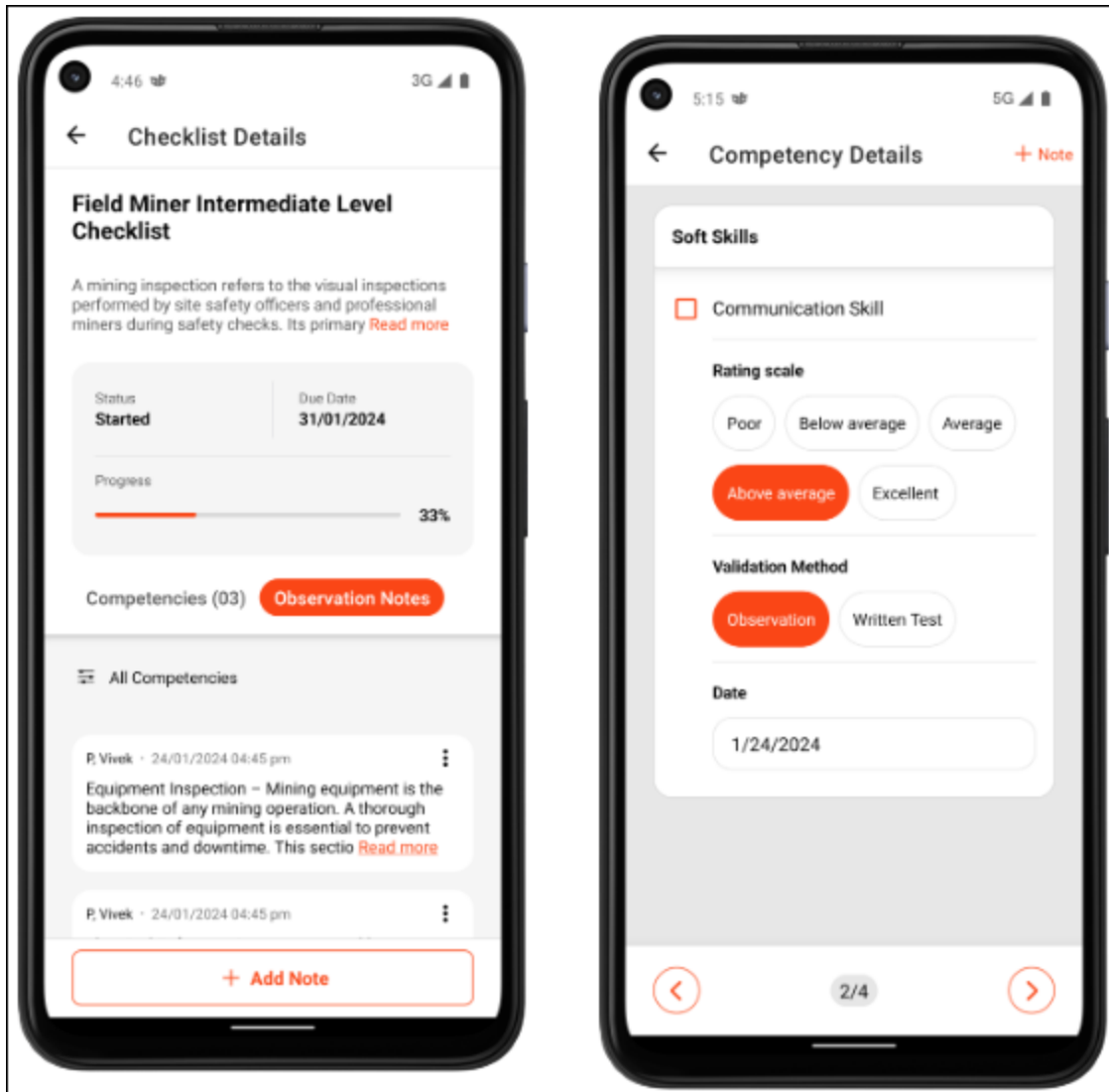
More Menu

Significant improvements have been made to the navigation tray and settings menu. These enhancements streamline the user experience and align with modern design principles.

In the Cornerstone CSX app, a More menu is now available in the navigation tray. This menu is a hub for accessing additional features and options within the app.

The More menu may contain the following options:

- User profile image
- Observation checklist
- Scan QR Code
- Settings
- Forget Me
- Log Out
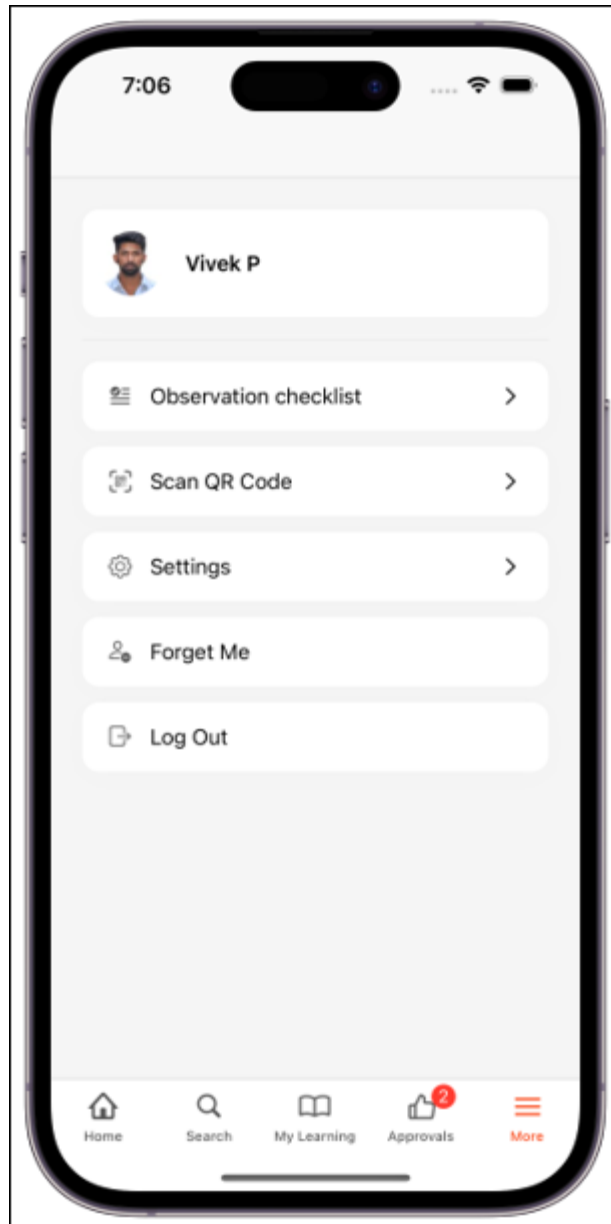
Enhanced Settings Menu

The existing settings menu is enhanced to align with modern information architecture and design principles. These enhancements result in a cleaner, more intuitive user interface, improving usability and visual appeal.
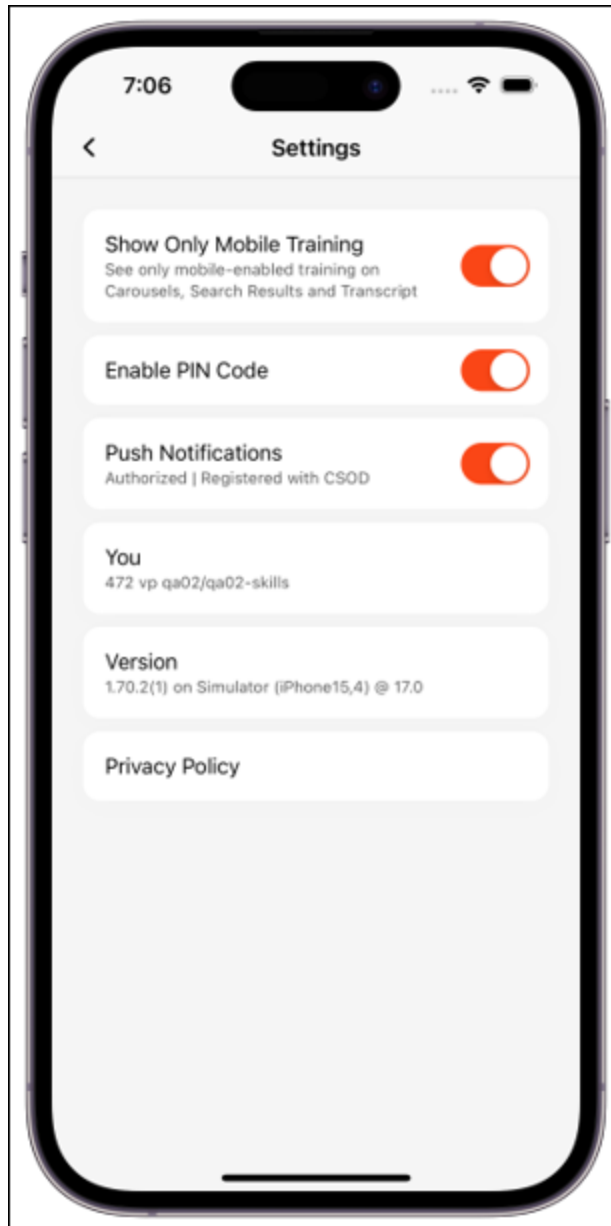
Implementation

This functionality is automatically enabled in app versions after the March '24 Release. If the apps on a user's device are configured to auto-update, no action is required from the user to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from either the Apple Store or the Google Play store.

Cornerstone CSX App enhancements are available with a delay after the release. Depending on your time zone, enhancements may be available in app stores on March 25 (based on US time zones).

This functionality is not available during UAT.

Reporting Enhancements

Reporting 2.0 New Fields - March 2024

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

- **Capabilities Fields**
- **Check-Ins Fields**
- **Recruiting Fields**
- **Learning Fields**
- **Position Management Fields**

Reporting 2.0 - Accessibility Enhancements

With this enhancement, accessibility enhancements have been made to keyboard focus and visual indicator support for screen readers.

The following accessibility issues are fixed with the Reporting 2.0 Landing page:

- Corrected the keyboard focus for the report name and report location.
- Corrected the visual indicators for My Reports for screen readers.
- Corrected the visual indicators for more options controls for screen readers.

The following accessibility issues are fixed with the Reporting 2.0 Viewer/Editor page:

- Corrected visual indicators for keyboard and tab support for screen readers
- Corrected visual indicators for filters and more option controls for screen readers.

How Does this Enhancement Benefit My Organization?

The improved keyboard focus and visual indicator support for screen readers enhance the ability of all users to access and use Reporting 2.0.

Implementation

This functionality is automatically enabled for all organizations the Reporting 2.0 module.

Reporting 2.0 - Disable Auto-Refresh for Viewer Page

Prior to this enhancement, the **Run When Opened** option in Report Properties would automatically execute the report upon opening it in the report viewer. Similarly, enabling **Auto-Refresh on Open** in **Report Viewer Properties** would automatically refresh the report viewer page upon opening. This behavior led to many reports being auto-refreshed.

With this release, both the **Run When Opened** and **Auto-Refresh on Open** options are removed. Now, the report will refresh only when the user clicks the refresh button on the report viewer page.

To access the report viewer page, go to REPORTS > REPORTING 2.0. Then, click the name of a report to open the report viewer.

The following image show the location from where the **Run When Opened** option is removed.
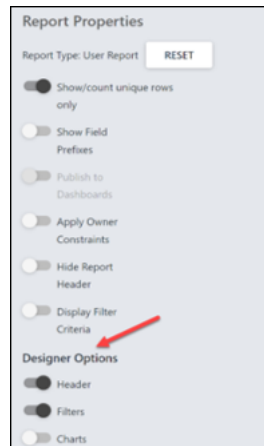
The following image show the location from where the **Auto-Refresh on Open** option is removed.
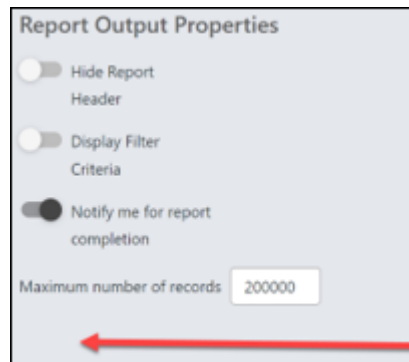
Note: The existing behavior for Excel, Schedule for Now, and Download your report is not impacted by this change. Clicking the Excel and Schedule for Now options still refresh the report data.

How Does this Enhancement Benefit My Organization?

This enhancement will improve the user experience by preventing reports from being auto-refreshed without user interaction, giving users more control and reducing unintended refreshes.

Implementation

This functionality is automatically enabled for all organizations the Reporting 2.0 module.

Permissions

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

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

Reporting 2.0 - Refresh Actions Disabled When Refresh In Progress

Prior to this enhancement, users on the report viewer page could initiate a report refresh and then click on another report refresh action, even when a report query was still in progress. This led to excessive and unnecessary query executions, resulting in unexpected report results.

With this enhancement, the system restricts access to refresh-related actions when a report query is in progress.

On the Report Landing page, the following actions are disabled when a report query is in progress:

- Download your report - Schedule for Now
- Export to Excel

On the Report Viewer Page, the following actions are disabled when a report query is in progress:

- Download your report - Schedule for Now
- Export to Excel
- Field filters
- Refresh

How Does this Enhancement Benefit My Organization?

Disabling the ability to refresh while a report refresh is in progress will reduce the number of report query executions and minimize unexpected report results, contributing to enhanced system performance and ensuring a smoother and more responsive user experience.

Implementation

This functionality is automatically enabled for all organizations using the Reporting 2.0 module.
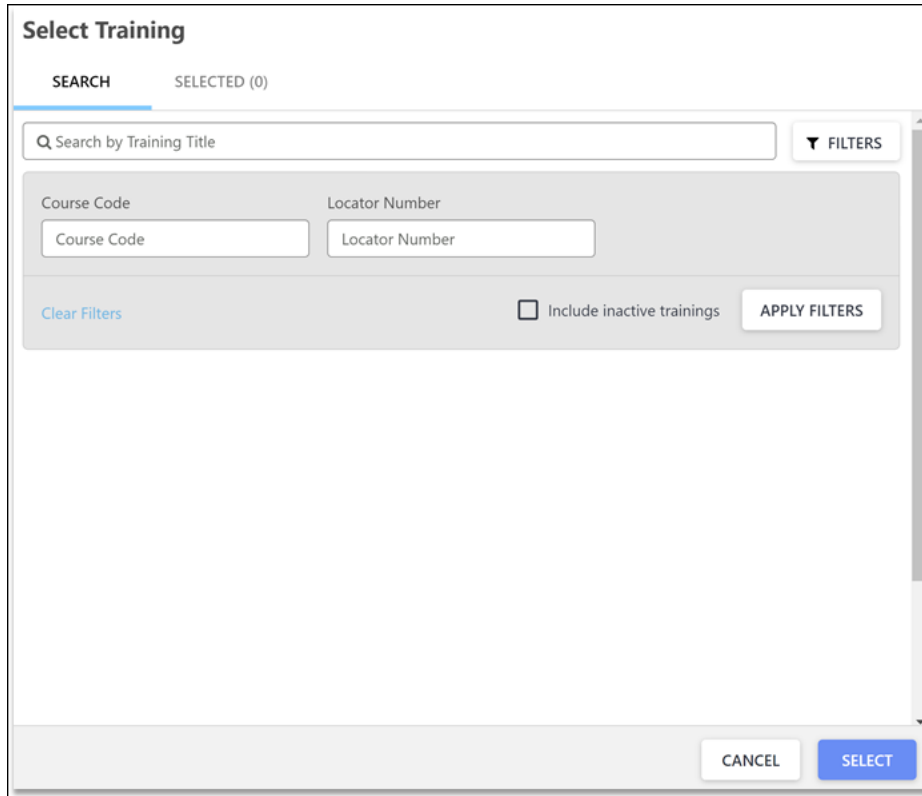
Permissions

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

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

Reporting 2.0 - Select Training Modal - Enhanced Search

Prior to this enhancement, the Search Training Modal within the Reporting 2.0 workflow used Traditional Search which uses SQL to return results. SQL takes more time to process large data sets and becomes less scalable as data grows over time.

With this enhancement, the Search Training Modal within the Reporting 2.0 workflow uses Enhanced Search to deliver results based on relevance. Enhanced Search is enabled by default and supports all the filters in the Search Training Modal except for the Description filter, which has been removed.

To access the Search Training Modal, go to REPORTS > REPORTING 2.0 and click **CREATE REPORT**. In the **Filters** section, click **SELECT TRAINING** under the **Training Title** field. It opens the Select Training flyout that includes the Search Training Modal.

How Does this Enhancement Benefit My Organization?

This enhancement reduces processing times for extensive datasets. Enhanced search offers a more efficient, scalable, and results-driven approach, enabling users to conduct better and faster searches, particularly in scenarios involving large datasets.

Considerations

- The current search results are sorted alphabetically; however, the Enhanced Search will display results based on 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 the following exceptions:

- Training is included as a part of a large data ingestion, or a large bulk update is completed. In these instances, the time for the update to appear in search results may vary based on the amount or size of the change.
- When a learning object is created or updated at the exact moment of a data set update, the learning object should be available shortly after the initial 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 Reporting 2.0, Enhanced Search will only consider the Title when searching.

How do I navigate to the modal that utilizes the Enhanced Search within Reporting 2.0?

To navigate to the modal, go to REPORTS > REPORTING 2.0 and click **CREATE REPORT**. In the **Filters** section, click **SELECT TRAINING** under the **Training Title** field. It opens the Select Training flyout that includes the Search Training Modal.

Why isn't the description filter being supported in Enhanced Search?

Our data tells us that the description filter is rarely used in this area.

My search results are not been the same since Enhanced Search was introduced. 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 Reporting 2.0 module.

Permissions

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

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

Reporting API - Underlying Code Libraries Upgraded

Beginning with the start of User Acceptance Testing (UAT) in stage environments on February 22, a number of underlying code libraries used by Reporting API were upgraded to ensure security and reliability. While this should be transparent to users (no new functionality was introduced), it is recommended that customers who use Reporting API test and verify their integrations. Given the wide array of integrations that use Reporting API, customers are encouraged to take this opportunity to test before the release to the production environment with the CSX March '24 Release on March 22. For additional details or questions, please refer to the **RTDW Documentation for Reporting API, RDW, and Data Exporter Community**.

Reporting Fields - Position Management

Prior to this enhancement, the Reporting 2.0 featured the field **Is Current Assignment** in four different locations. The identical name caused confusion, particularly when users tried to include these fields in report filters.

This enhancement renames the field under each location with a more descriptive and specific name, improving clarity for fields used in reporting for position management. The following outlines the details of the name changes:

LOCATIONS	NEW FIELD NAME
Position > Employee Assignment	Is Current Employee Assignment
Job Assignment	Is Current Job Assignment
Parent Relation	Is Current Parent Assignment
Position > Unit Assignment	Is Current Unit Assignment

How Does this Enhancement Benefit My Organization?

Reporting 2.0 Field Renaming improves the user experience (UX) when Position Management is enabled in a portal.

Implementation

To enable this functionality, contact Global Customer Support.

Permissions

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

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

RTDW Updates to OData v4.0 Delta Objects

Impacting only customers using Data Exporter API, new objects will be added that support the OData v4.0 Delta/Change Tracking capabilities for Data Exporter API. 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 March '24 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 February 22 and in production portals with the release on March 22.

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

The following items are scheduled for deprecation:

OBJECT PUBLIC NAME	REPLACED BY	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
CheckinNote	CheckinNote2	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

OBJECT PUBLIC NAME	REPLACED BY	CHANGE DATE	ACTION
COMPATIBILITY_ou_custom_field_text_response_local	ou_cf_text_local_core	Release 24.03.00 (Nov 2024)	Marked for deletion
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

OBJECT PUBLIC NAME	REPLACED BY	CHANGE DATE	ACTION
filter_lo_user	training_availability_by_user_core	Release 24.03.00 (Nov 2024)	Marked for deletion
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	Release 24.03.00 (Nov 2024)	Marked for deletion

OBJECT PUBLIC NAME	REPLACED BY	CHANGE DATE	ACTION
	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		
training_schedule	training_part2_core	Release 24.03.00 (Nov 2024)	Marked for deletion
	training_part_attendance_core		
	address_core timezone_core		
	training_core		
	users_core ou_core		
transaction	training_purchase_core	Release 24.03.00 (Nov 2024)	Marked for deletion
	training_purchase_line_item_core		
	training_purchase_payer_core		
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

OBJECT PUBLIC NAME	REPLACED BY	CHANGE DATE	ACTION
The following XXX_cf_enum_local_core objects: • 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	The following XXX_cf_enum_local2_core objects: • application_cf_enum_local2_core • devplan_cf_enum_local2_core • offer_letter_cf_enum_local2_core • ou_cf_enum_local2_core • performance_review_cf_enum_local2_core • succession_cf_enum_local2_core • training_cf_enum_local2_core • training_forecast_cf_enum_local2_core • user_cf_enum_local2_core 'Version 2' of these objects add either 'field_id' or 'property_id' to the primary key to more easily facilitate finding all enumeration options associated with a particular custom field; a unique index on 'option_id' + 'culture_id' is still honored so that the new objects can still be filtered (when using DEAPI) similar to the legacy objects.	Release 25.01.00 (March 2025)	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

CHANGE TYPE	OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
Description Change	training_core: 'thumbnail_location'	Description updated to use case-sensitive 'LoThumbnail_Upload' in url part	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
Addition	training_ilt_facility_core	Added	Release 24.01.00 (March 2024)	Scheduled
Addition	UserRatingVisibility_local	Added	Release 24.01.00 (March 2024)	Scheduled
Addition	Some endpoints were missing in the Edge API Management list of 'Reporting API' scopes available to OAuth applications. So while these objects were available to users of the file-based Data Exporter, and may have even been published in previous versions of DEAPI documentation, they were not accessible by DEAPI users. Scopes have now been added, so these can be considered 'new objects' to DEAPI users: AvailabilityType CapabilityCategory CapabilityCategory_local CapabilityCategoryMap CapabilityModelCapabilityMap CategoryStatus devplan_comment_core devplan_comment_reply_core	Added	Release 24.01.00 (March 2024)	Scheduled

CHANGE TYPE	OBJECT PUBLIC NAME	CHANGE DESCRIPTION	CHANGE DATE	ACTION
	devplan_objective_comment_core			
	devplan_objective_comment_reply_core			
	job_application_status_local_core			
	job_requisition_cf_core			
	SkillsGraphLinkMethod			
	TargetType training_available_culture_core			
	training_ilt_facility_type_local_core			
	training_part_instructor_core			
	training_part2_core			
	training_purchase_payer_core			
	training_purchase_payment_type_core			
	training_purchaser_overrides_core			

RTDW - Changes Scheduled

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 is changed from nvarchar(4000) to nvarchar(10000)	Release 24.01.00 (March 2024)	Scheduled

Reporting API - Changes Scheduled

The following items are scheduled for deprecation:

OBJECT PUBLIC NAME	REPLACED BY	CHANGE DATE	ACTION
vw_rpt_applicant_response	vw_rpt_ats_compliance_question_applicant_responses vw_rpt_ats_compliance_question_applicant_responses_dt	Release 24.03.00 (Nov 2024)	Marked for deletion

Cornerstone HR

Forms

Form Management – Refresh Option

Prior to this enhancement, refreshing published forms required several steps to refresh the form with the latest changes.

With this release, forms can be refreshed to reflect custom field name and translation adjustments which were done after the form is published.

On the Custom Field Administration page, the following updated custom field settings are reflected when refreshing a form:

- Custom field name updates
- Custom field name translations with newly, updated, or deleted localization.

To access the Custom Field Administration page, go to ADMIN > TOOLS > CORE FUNCTIONS > CUSTOM FIELD ADMINISTRATION.

The following settings are automatically reflected on all forms without a refresh:

- Custom Field Regex Pattern
- Applicability (only available to CHR customers)
- Availability

The following custom field settings are excluded from the refresh action on user record custom fields:

- Read-only
- Required

Submitted but currently not approved forms are also showing the updated custom fields after the form has been refreshed.

Refresh Forms

Refresh forms on the Manage Forms page. Only forms that are active and published can be refreshed.

To access the manage forms page, go to ADMIN > TOOLS > CORE FUNCTIONS > FORM MANAGEMENT > MANAGE FORMS.

To refresh forms:

1. Select an option below:
   - To select specific forms, select options in the Select column.
   - To select all available forms, select **Select all from this page**.
2. Select **Refresh published forms**.
3. Select **CLOSE** on the confirmation message.

Note: When activating a deactivated form which is already in published status, please make sure to refresh it to reflect the newest custom field configuration.

After a refresh, if you move to another page, all of the selected options are unselected.

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
Compensation Custom Fields - Manage	Grants ability to define custom fields for the employee compensation statement. This is an administrator permission.	Compensation - Administration
Development Plan Custom Fields - Manage	Grants access to create and edit custom fields used in development plans and templates. This is an administrator permission.	Performance - Administration
Display all Training Custom Fields	Enables display of all training custom field values including blank fields when viewing details of training on transcript. Without this permission, the custom field will only appear if it is populated with a value. This is an end user permission.	Learning
Organizational Unit Custom Fields - Manage	Grant Access to create and edit custom fields for Org Units. This is an administrator permission.	Core Administration
Performance Review Custom Fields - Manage	Grants access to create and edit custom fields for Performance Reviews. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
Self-Registration and User Record Custom Fields - Manage	Grants access to manage custom fields for user Self Registration and the user record in Custom Field Administration. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration
SF-182 Custom Fields - Manage	Grants ability to manage SF-182 Fields (Governmental clients). This is an administrator permission.	Limited Use/Obsolete
Succession Management Plan Templates - Manage	Grants ability to create and edit Succession Management Plan (SMP) templates for use in assessing talent (incumbents and successors) in SMP tasks. This permission cannot be constrained. This is an administrator permission.	Talent/Succession - Administration
Training Custom Fields	Grants ability to create and edit custom fields to be used for one or more learning object types. This is an administrator permission.	Learning - Administration

Training Request Form Custom Fields - Manage	Grants access to create and edit custom fields used for Training Request Forms. This is an administrator permission.	Training Forms Administration
Vendor Custom Fields - Manage	Grants access to manage training vendor (provider) custom fields.	Learning - Administration
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 does not grant access to the Training Forms Management functionality.*	Forms Management Administration

Position Management

Position Management – Overview and General Availability Announcement

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.

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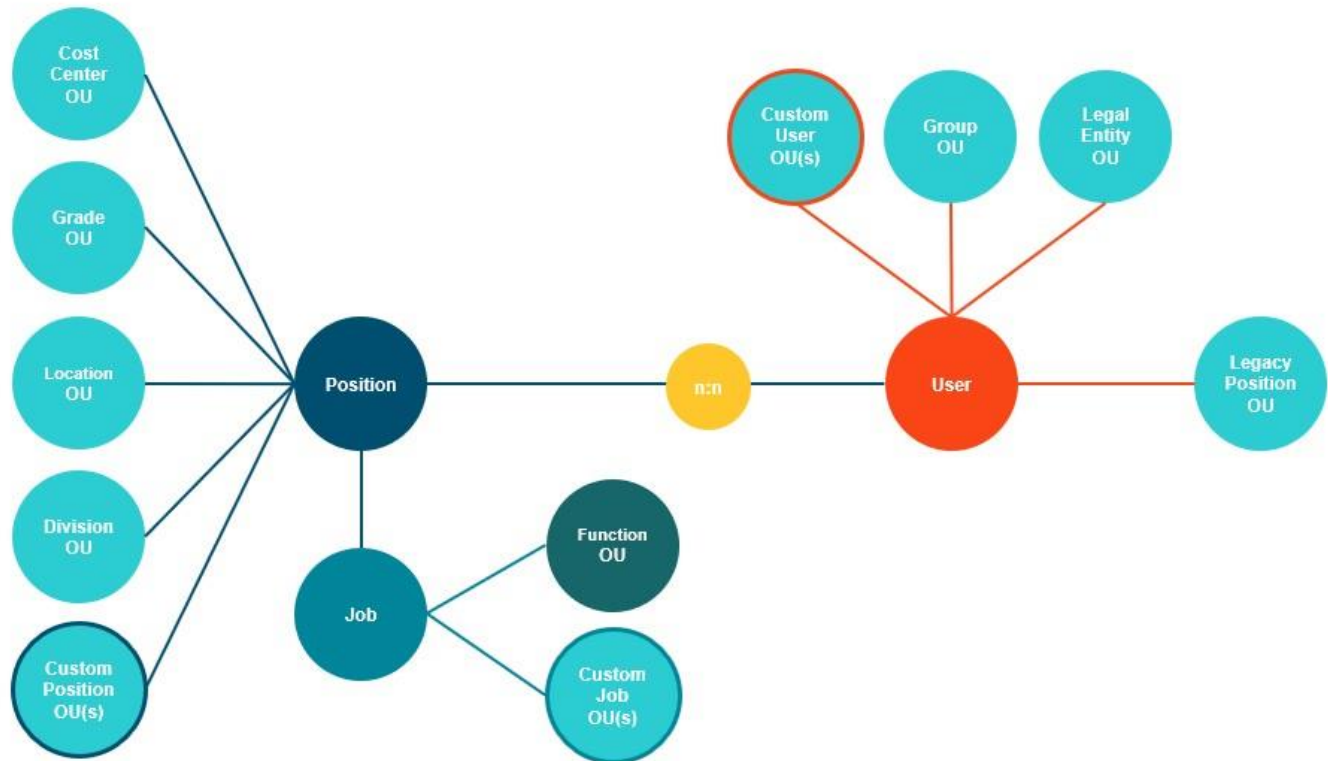
As a part of the Cornerstone HR product suite, Position Management in CSX provides an additional option to define, consolidate and map organizational data structures to meet the next levels of demand and flexibility.

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	Position	Job	Function
An employee in the organization.	A specific seat or role in the organization with a place in the hierarchy including organizational units.	A group of multiple positions that share similar duties, responsibilities and qualifications.	A broader role of a job which helps to organize and structure roles and responsibilities efficiently.
Example: John Smith	Example: Country Sales Manager Italy	Example: Country Sales Manager	Example: Sales

- 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:
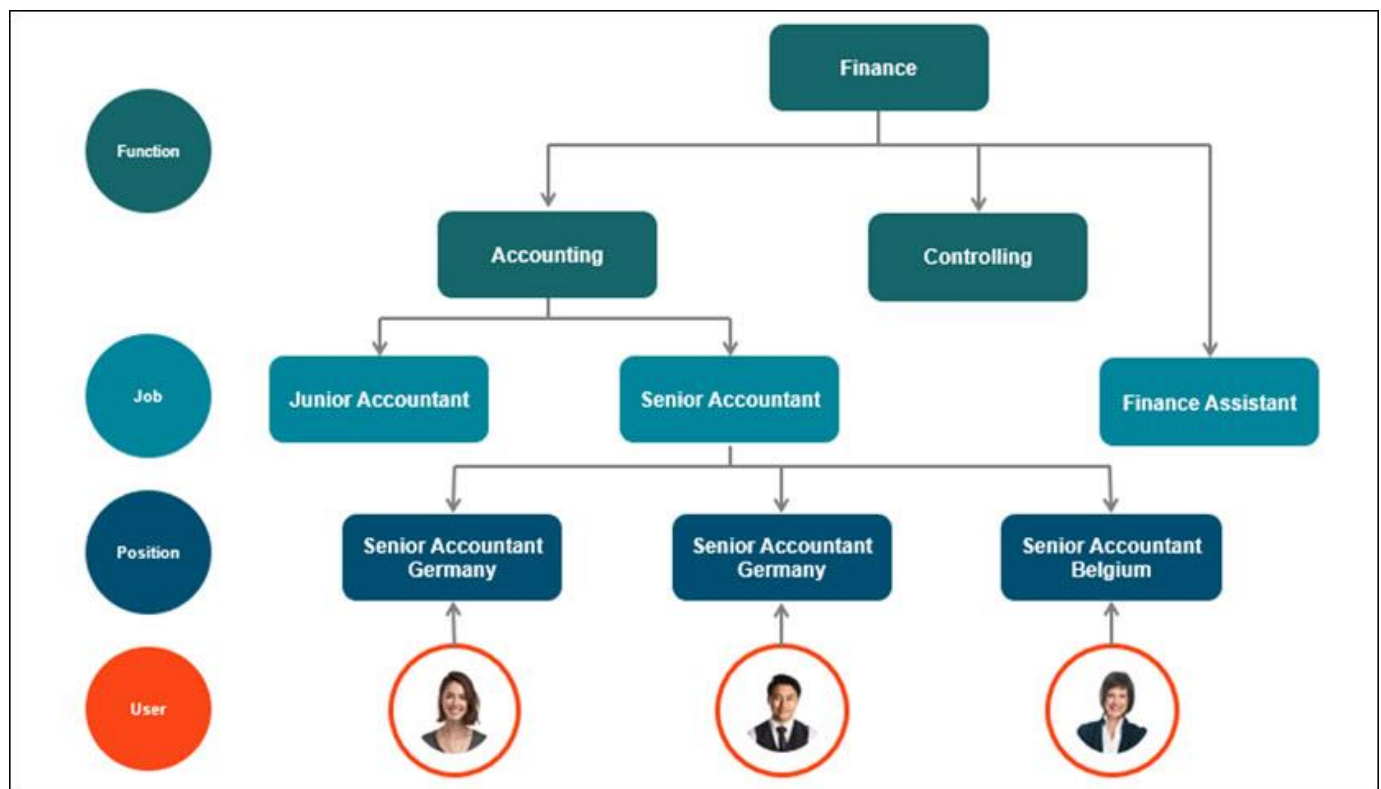
Position Management – Capabilities

Prior to this enhancement, Position Management did not display capabilities from a capability model with an audience set to either a Position, Job, Function or an Organizational Unit.

With this enhancement, a new section displays details from a capability model for:

- Positions
- Jobs
- Functions
- Standard Position OU Types (Division, Location, Cost Center & Grade)
- Custom OU Types for Position and Jobs

Capability Views

There are two views in PM capability management:

- Tags View
- Table View

Additionally, users can search for capabilities by Target Level, Category, Source, and Capability Model.

Tags View

The Tags view has the following features:

- Assigned capabilities listed in alphabetical order.
- A counter that displays the number of current assignments/occurrences.

Selecting a capability opens a flyout that displays Target Level, Audience, and Capability Model.

Table View

- Assigned capabilities listed in alphabetical order.
- Information about ID, Capability, Target Level, Category, source, and Capability Model.

Capabilities for Positions

Capabilities for a Position are displayed using multiple sources, because Positions can be associated with different Jobs, Functions, and Organizational Units (OUs).

Any capability associated to a Position or can be derived from a Job, Function or an Org Unit assigned to the Position will be displayed on the Position.

Capabilities for Jobs

Capabilities for a Job are displayed using multiple sources because a Job can be associated to a Function and Custom Job OUs .

Any capability associated with a capability model where the audience is set to a Job or can be derived from a Function or Custom Job OU associated to the Job is displayed on the Job.

Capabilities for Functions

Capabilities for a Function display for capability models set to a Function as a source.

Any capability associated to a capability model where the audience has been set to a Function is displayed on the Function.

Capabilities for Organizational Units

Capabilities for a Function display for capability models which are set to a Function as a source.

Any capability associated to a capability model where the audience has been set to a Function is displayed on the Function.

Considerations

- This enhancement relies and focuses only on surfacing/displaying details from capability models configured within Capability Management.
- If a modification is made at the capability model level, it is dynamically be reflected in Position Management.

Implementation

To enable this functionality, contact Global Customer Support.

Position Management – Custom Fields
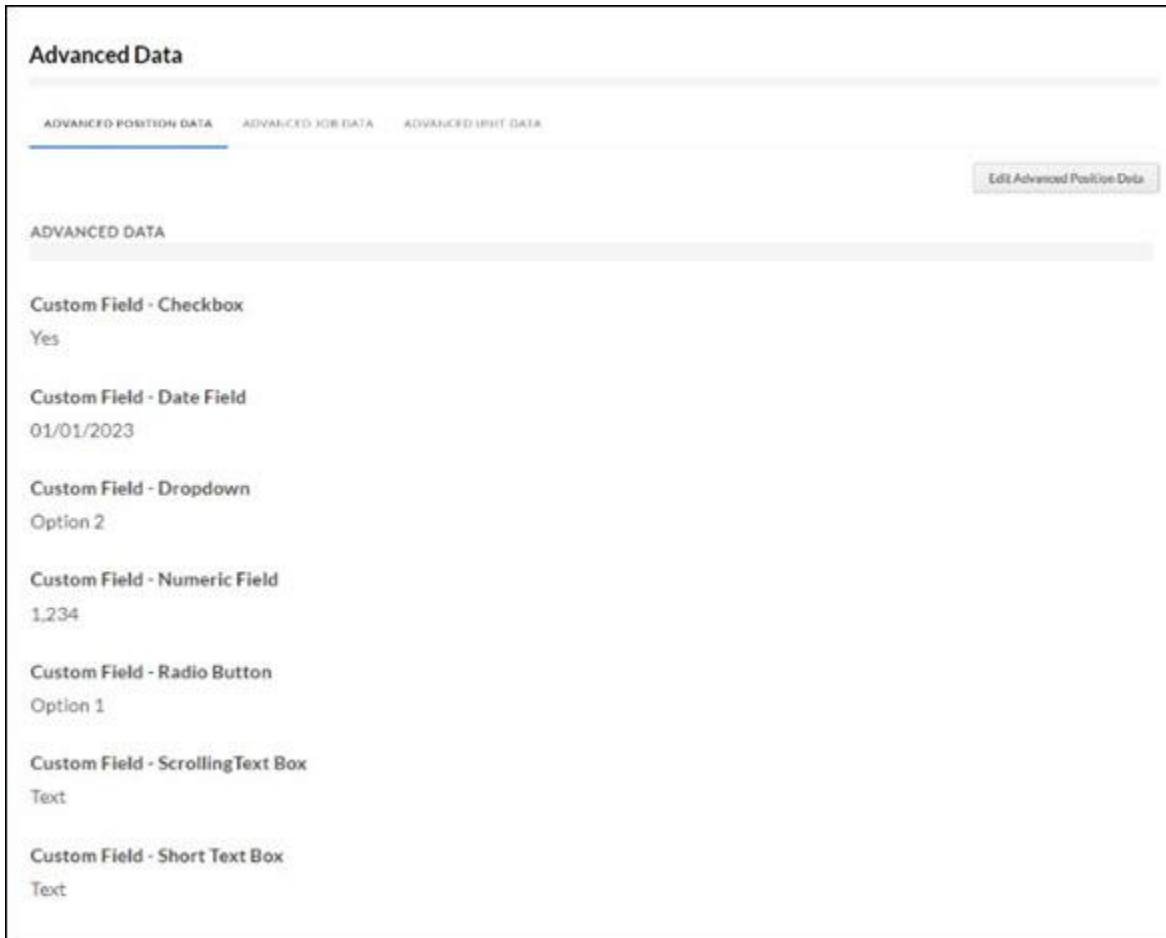
With this release, users can create and maintain custom fields for Positions and Jobs.

Custom fields are managed in the existing Custom Field Editor. The following custom fields are available for Positions and Jobs:

- Checkbox
- Date Field
- Dropdown
- Numeric Field
- Radio Button
- Scrolling Text Box
- Short Text Box

To access the Custom Field Editor, go to ADMIN > TOOLS > CORE FUNCTIONS > CUSTOM FIELD ADMINISTRATION.

Custom Fields for Positions

Administrators can view and manage custom fields for Positions in the Advanced Data section. If there are any position custom fields configured, these fields appear on the Advanced Position Data section when creating and editing a position. This section also displays custom field information for a current
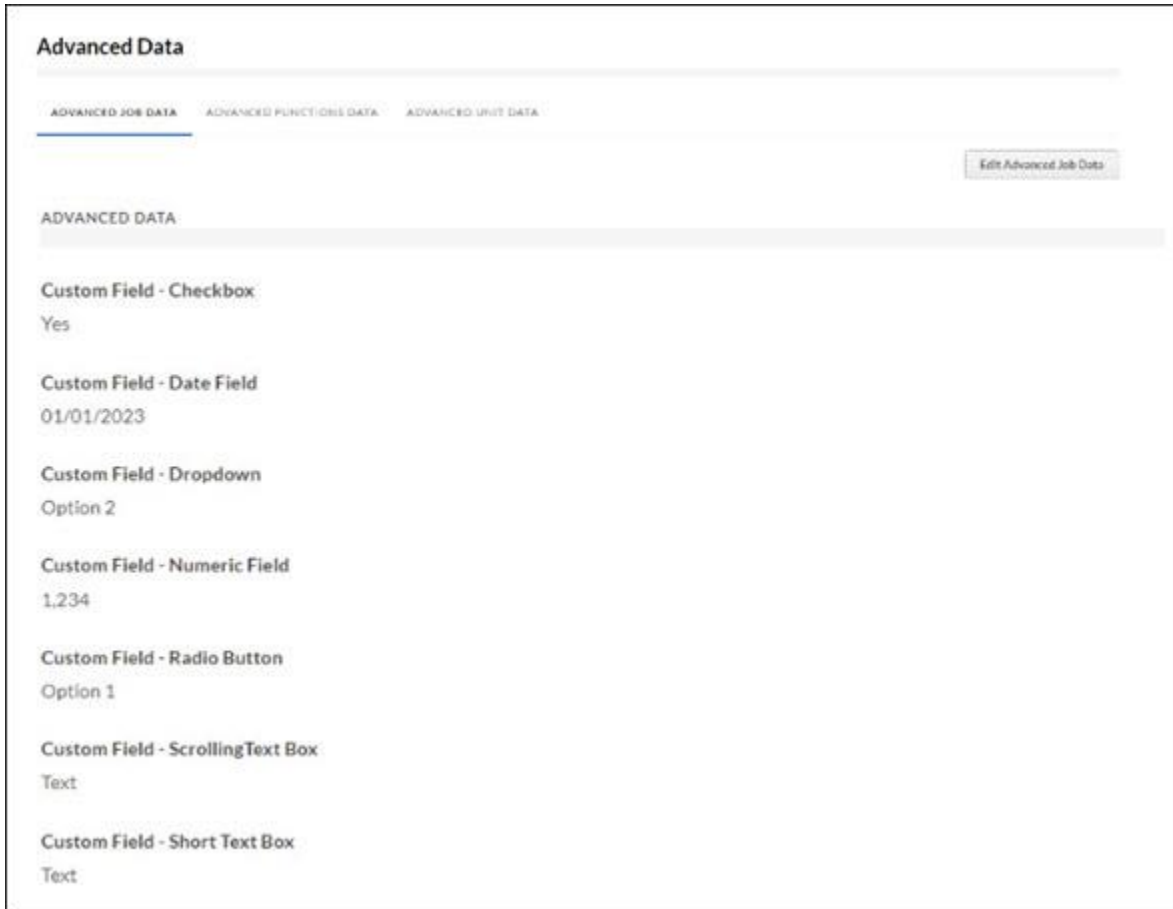
assigned Job, Standard Organizational Units (OUs) (Cost Center, Division, Grade, Location), or Custom OUs tied to Positions.

If there are any position custom fields, these fields appear in the Advanced Job Data tab and the Advanced Unit Data tab.

All custom fields are available in CSX OU Management (for Positions OU Type).

To access this page, go to Position Management, select the Position tab, and then select a Position. On the Advanced Data section, select the Advanced Position Data tab.

Custom Fields for Jobs

Adminstrators can view or manage the custom field information for a selected Job in the Advanced Data section.

If there are any job custom fields configured, these fields appear in the Advanced Job Data section when creating and editing a job. This section also displays custom fields information for a current assigned Function or Custom OUs tied to Jobs.

If there are any job custom fields, these fields appear on the Advanced Functions Data tab or Advanced Unit Data tab.

All custom fields are available in CSX OU Management (for Jobs OU Type).

Considerations

- When Position Management is activated, standard and custom Organizational Units for Positions and Jobs are managed in Position Management and not in the existing OU administrator pages.
- Custom Fields entered to the Position, Job, Function, Standard Position OU Type, Custom OUs tied to Positions or Jobs will not be synchronized to the User record.
- Custom OUs tied to Positions or Jobs are called "Custom Position OU Types". The same applies for Jobs.
- For custom fields, custom Edge Import Loads and reporting capabilities are not available in this release.

Implementation

To enable this functionality, contact Global Customer Support.

Permissions

The following new permissions applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Jobs: Custom Fields - Manage	Grants users the ability to manage custom fields for Jobs.	Position Management
Positions: Custom Fields - Manage	Grants users the ability to manage custom fields for Positions.	Position Management

Position Management – Custom OU Types

With this release, in Position Management, users can add custom OU Types to the Position and Job.

User's custom OU memberships can be identified for all current Position assignments.

Once Position Management is activated, standard and custom Organizational Units for Positions and Jobs are managed within Position Management and not within the existing OU administration pages.

New Custom OU Types
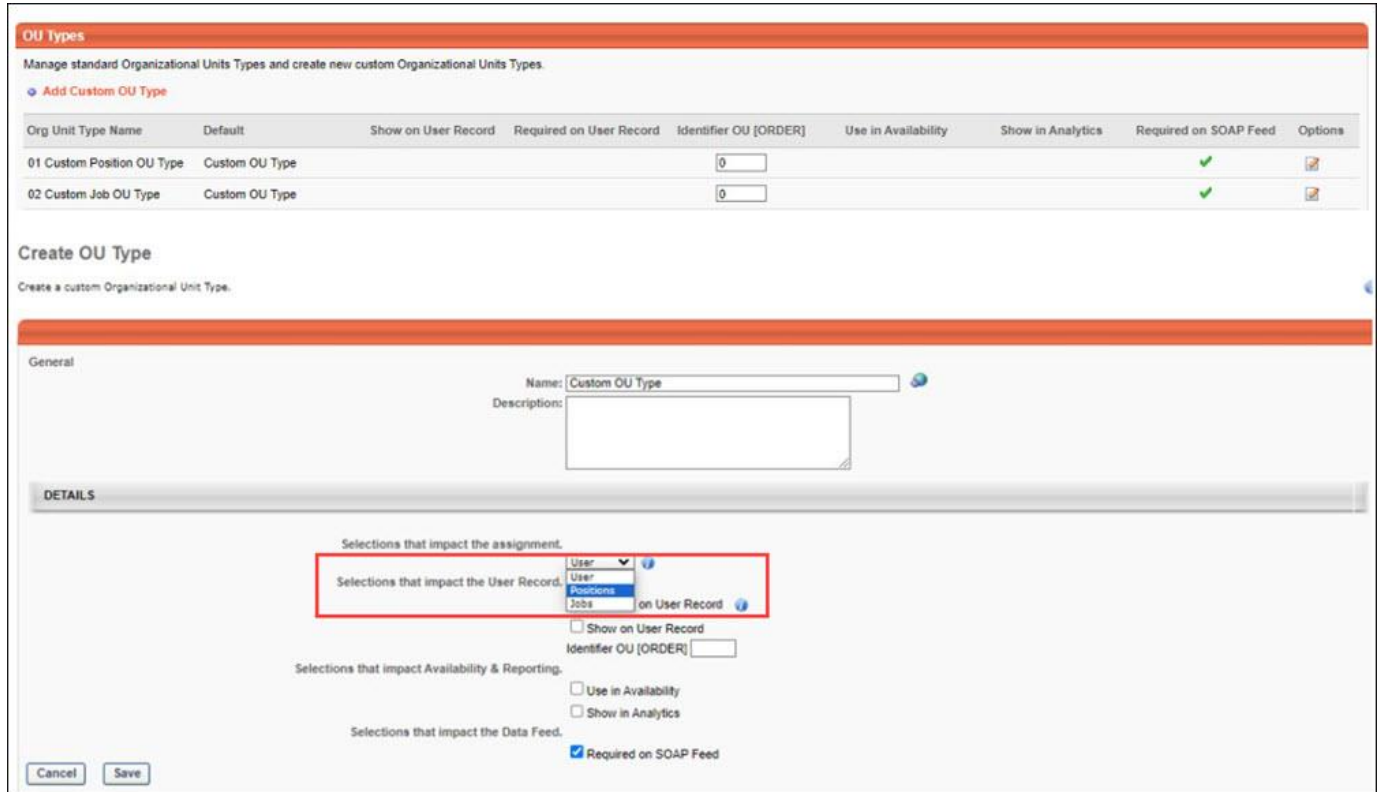
Custom OU Types are managed in the existing Organizational Unit Type Management.

When creating a new custom OU Type, a new field **Selections that impact the assignment** is available to tie the custom OU to the Position or the Job.

This new field has the following options:

- User –The custom OU is still defined at the user record level.
- Positions – Ties the custom OU to the Position.
- Jobs –Ties the custom OU to the Job.

If the Positions or Jobs option is selected, users cannot update the value of this custom OU at the user record level. Users can create several custom OU types for Positions and Jobs.

To access Organizational Unit Type Management, go to ADMIN > TOOLS > CORE FUNCTIONS > ORGANIZATIONAL UNITS. Then, select the Manage Organizational Unit Hierarchy link.

New Custom OU Hierarchy

If Positions or Jobs is selected from the **Selections that impact the assignment** drop-down, the hierarchy is managed in Position Management.

Organizational Unit Types can be managed in a hierarchical structure by defining parent and child associations. After selecting an Organizational Unit, the following information can be viewed and managed:

- General Information
- Advanced Data (Custom Fields)
- Unit Status (Active/Inactive) (Effective Dated)
- Unit FTE Overview
- Assigned Parent Unit (Effective Dated)
- Capabilities

If Users is selected from the **Selections that impact the assignment** drop-down, For existing custom OU types, and the new custom OU type, the hierarchy management is unchanged.

To access this functionality, go to Position Management and select the Organizational Units tab. Select a custom Position OU Type or custom Job OU Type in the dropdown.

Assign Custom OUs to Positions and Jobs

PM displays information about past, current, and future Units. Users can schedule future changes to keep all historic assignments in the organization.

Positions Organizational Units

Assigning custom OUs to Positions for all the custom OU types is done at the Position level.

To access this page, go to Position Management, select the Position tab, and then select a Position. On the details page, locate the Organizational Structure section and select the Organizational Units tab.

Jobs Organizational Units

Assigning custom OUs to Jobs for all the custom OU types associated is done at the Job level.

To access this page, go to Position Management, select the Jobs tab, and then select a Job. On the details page, locate the Job Organizational Structure section and select the Organizational Units tab.

User's Custom OUs

A user's custom Position and Job OU memberships of are derived from all current Position and Job assignments, allowing users to have multiple assigned custom OUs. All current assigned custom OUs to User's Positions and Job are displayed on the user record.

As a result, all changes must be made in the Position Management environment through a valid Position assignment. It is not possible to update the information directly on the User record when creating or editing a user.

The Standard Organizational Units from an employee's primary position will be synchronized to the user record (Division, Location, Grade and Cost center). An employee would have only one Division, Location, Grade and Cost center, even if they are assigned to multiple position swith different Divisions, Locations, Grades and Cost Centers.

Considerations

- For custom fields, custom Edge Import Loads and reporting capabilities are not available in this release.
- Custom Position OUs and custom Job OUs are available in existing Position Management constraints.

Implementation

To enable this functionality, contact Global Customer Support.

Permissions

The following permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Positions: Organizational Units - Manage	Grants users the ability to manage custom fields for Organizational Units.	Position Management

Position Management – Edge Import Enhancements

With this enhancement, Position Management introduces more capabilities for existing loads and new loads to support relevant bulk data operations in Edge Import.

Custom Field Support

Position and Job metadata load data is now visible.

Standard Organizational Structure Assignment for Positions

Position metadata is now visible.

🔧 Configuration Snapshot: position standard
What is this?

Options   **Mapping**

Show All Column Headers ▾

Show Required Unmatched ▾

Status	Column Header	Map To Field	Description	Unmatched Fields
●	Position ID	Position ID*	Must be a unique ID for every Position. ID must differ from the Corp OU and all other OU of the type. Both alpha and numeric characters are acceptable.	
●	Position Title	Position Title*	The Position Title is used to label each Position.	
●	Position Description	Position Description	Provide extra information to describe the Position.	
●	Multiple Incumbents Allowed	Multiple Incumbents Allowed	Setting to prevent multi-assignments or allow shared seats.	
●	Utilization Control	Utilization Control	Setting to prevent over-utilization.	
●	Job ID	Job ID*	Must be a unique ID for every Job. ID must differ from the Corp OU and all other OU of the type. Both alpha and numeric characters are acceptable.	
●	Position Status FTE	Position Status FTE*	Provide the value relevant to the FTE Position Status record.	
●	Position Status Effective Date	Position Status Effective Date	Effective date of the position status record.	
●	Position Status	Position Status	Provide the value relevant to the Position Status record.	
●	Division ID	Division ID	Must be a unique ID for every OU. ID must differ from the Corp OU and all other OU of the type. Both alpha and numeric characters are acceptable.	
●	Location ID	Location ID	Must be a unique ID for every OU. ID must differ from the Corp OU and all other OU of the type. Both alpha and numeric characters are acceptable.	
●	Grade ID	Grade ID	Must be a unique ID for every OU. ID must differ from the Corp OU and all other OU of the type. Both alpha and numeric characters are acceptable.	
●	Cost Center ID	Cost Center ID	Must be a unique ID for every OU. ID must differ from the Corp OU and all other OU of the type. Both alpha and numeric characters are acceptable.	

* This field is required

[Close]

Position Organizational Structure Assignment Load

Position Relationship Functional Load
There is a new dedicated load for functional relationships.

Implementation

To enable this functionality, contact Global Customer Support.

Permissions

The following permissions apply to this functionality:

- Edge Import - CHR - Position Relationships Functional
- Edge Import - CHR - Position Relationships Functional - Bulk API
- Edge Import - CHR - Position Relationships Functional - Feed
- Edge Import - CHR - Position Organizational Structure Assignment
- Edge Import - CHR - Position Organizational Structure Assignment - Bulk API
- Edge Import - CHR - Position Organizational Structure Assignment - Feed

There are no constraints for these permissions.

Learning

Learning Enhancements

Ability to Assign Training Beyond Managers (Early Adopter)

Ability to Assign Training Beyond Managers (Early Adopter)

With this enhancement, we introduced a new Assign Training with Constraints permission, enabling users without managerial or approver roles to assign trainings. The simplified user interface provides an intuitive and streamlined experience with robust search functionality. Up to 1000 users can now be assigned training. The following are the key features of this enhancement:

- The new Assign Training with Constraints permission can be granted to any Security Role.
- The User Interface (UI) is now simpler and more intuitive.
- Users can easily search for others by their first name, last name, division, position, location, or manager's name.
- The ability to select multiple users simultaneously for a specific training.
- The Assign Training page now consistently presents key details for all Learning Objects (LOs).
- The Assign Training page displays more user details with multiple columns, providing comprehensive information at a glance.

The new Assign Training UI is available to anyone with the new Assign Training with Constraints permission when assigning training from Learner Home, Learning Search, and Learning Details.

To assign training from the Training Details page, search for the learning object (LO), and then, click the **ASSIGN** button. Enter the necessary details on the Assign Training page and click **SUBMIT**. *See* **Assign Training Page Features** on page 195 *for additional information.*

How Does this Enhancement Benefit My Organization?

With this improvement, assigning training has become easier for non-administrative users through the introduction of a user-friendly interface. This will reduce delays, errors, and the administrative workload.

Considerations

- The new UI does not support Assignment for Cohort and Certifications. Users will always be redirected to the old UI for certifications and cohorts, regardless of their permissions.
- The previously existing UI is still used when training is assigned through the Transcript, MyTeam or Universal Profile Actions. The previously existing Assign Training page and permission still work for anyone who does not have access to the new permission.
- For users with both permissions, the previously existing Assign Training page and permission continue to function in scenarios that are not supported by the new Assign Training UI and permission, and/or when assigning training outside the constraints of the new permission.
- The **ASSIGN** button will not be visible if the user does not have Assign Training with Constraints or Assign Training permission. Also, the training needs to be within user constraints for the Assign button to be visible.
- Users with only the Assign Training permission will always be redirected to the previously existing UI with manager constraints.
- If a user possesses both Assign Training and Assign Training with Constraints permission, they will be directed to the new UI for trainings falling within the constraints of the new permission. For other trainings within their availability, they will see the Assign action and be directed to the old UI, where they can assign the training only to users for whom they are the manager, approver, or cost center approver.
- Note that if any constraints are modified for the Assign Training with Constraints permission, it may take up to 1 hour to propagate the updated constraints.

- For a learning object (LO) without an associated price, if the **Registered Users On Approval** checkbox is selected during creation, the **Auto Register** checkbox on the Additional Details page of the Assign Training Project becomes redundant. This implies that the user will be assigned with a Registered status.
- Trainings are assigned to users selected as new registrations (Assign New Occurrence). This implies that if learners are currently in progress for a training, their progress will be reset, and they will receive a new registration. For curricula, the progress of all associated child trainings will also be reset. This is true if the recurrence settings are enabled on the LO in the course catalog.
- If a pricing rule by Organizational Unit (OU) is established, the **Automatically register users** checkbox is not disabled for the OU that has a price.

Frequently Asked Questions (FAQs)

What happens if I try to select more than 1000 users for a training assignment?

You will be notified that the maximum number of selected users (1000) has been reached. No more users can be selected at this time. You will need to reduce your selection to 1000 or less.

Why can't I click on the Assign button?

The Assign button will not be visible if the user does not have Assign Training with Constraints or Assign Training permission. Also, the training needs to be within user constraints for the Assign button to be visible.

Why can't I click on the Continue to details button?

Continue to details button will be disabled if:

- No user is selected for the training assignment.
- The number of users selected is equal to or greater than 1000.
- The number of selected users are greater than the seats available.

Why do I see the total number of users as 10K when I know it should be more?

Enhanced Search is designed to fetch up to 10K users based on the permissions and constraints set in the system. If no specific search criteria are entered, the system retrieves any 10K users within those parameters. To ensure relevance, we recommend refining your search criteria to narrow down the number of users to less than 10K.

Please note that training assignments can only be done for up to 1000 users at a time. Hence, we recommend using Learning Assignment Tool (LAT) to assign training if the number of users is greater than 1000.

Why do I see spinner when I click on Assign button or Submit button?

When loading training details and user information, it may take some time to display the information on the page. Similarly, when submitting a list of users for assignments, there might be a delay. The spinner is displayed while training and user data are loaded in the background or until the training assignment is processed.

How can I see the seat availability while assigning the session, provided I have the relevant permissions?

If enrollment reservations or restrictions are configured for the session being assigned, then View seat availability link button will be displayed. Clicking View seat availability will open a modal with additional seat information.

How will training with recurrence be assigned to users who already have the same training In Progress on their transcript?

When a training has recurrence enabled, and learners are selected for reassignment, a notification will be displayed on the 'Select users' screen to notify the assignor that progress will be overwritten. If the users that are in an In Progress status are deselected, then the notification will disappear.

Notification text: One or more users previously started this training. Re-assignment will reset any work in progress.

Which training statuses are considered as In Progress?

The following statuses are considered In Progress and the notification will be displayed if one or more users selected have the following status for their current registration.

- Completion Approval Denied
- Completion Approval Denied / Past Due
- Failed
- Failed / Past Due
- In Progress
- In Progress / Past Due
- Incomplete
- Incomplete / Past Due
- Past Due
- Pending Acknowledgement
- Pending Acknowledgment / Past Due
- Pending Completion Approval
- Pending Completion Signature
- Pending Completion Signature /Past Due
- Pending Evaluation
- Pending Evaluation / Past Due
- Pending Grade
- Pending Grade / Past Due
- Pending Observer Completion
- Pending Observer Completion
- Pending Observer Completion / Past Due
- Pending Post-Work
- Pending Post-Work/Past Due
- Pending SF-182 Form Approval
- SF-182 Form Denied

What will be the Transcript delivery method when training is assigned using new permission?

Transcript Delivery Method field in Reporting 2.0 will display Direct Assignment when training is assigned using the new permission.

How shall I assign training if the number of users exceeds 1000?

Use the Learning Assignment Tool (LAT) to assign training in bulk to large groups of users.

How is Transcript history updated when training is assigned, reassigned or a newer version of training is assigned?

The following are the details on how transcript history updated when training is assigned, reassigned or a newer version of training is assigned.

TRAINING STATUS	AUTOMATICALLY REGISTER USERS CHECKBOX	FINAL STATUS	COMMENTS ADDED?	ENTRIES*	TRANSCRIPT HISTORY ENTRIES (WILL BE LOCALIZED AND SORTED BY DATE WITH THE MOST RECENT ENTRY AT THE TOP)
Assigned	Not checked	Approved	No	1	Assigned by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: Initial Request
Assigned	Not checked	Approved	Yes	1	Assigned by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: ()
Assigned	Checked	Registered	No	2	• Assigned by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: Initial Request • Registered by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM
Assigned	Checked	Registered	Yes	2	• Assigned by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: () • Registered by User First Name and Last Name
Re-assigned**	Not checked	Approved	No	1	Assigned by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM
Re-assigned**	Not checked	Approved	Yes	1	Assigned by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: ()
Re-assigned**	Checked	Registered	No	2	• Assigned by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM • Registered by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: Automatic registration upon training assignment

TRAINING STATUS	AUTOMATICALLY REGISTER USERS CHECKBOX	FINAL STATUS	COMMENTS ADDED?	ENTRIES*	TRANSCRIPT HISTORY ENTRIES (WILL BE LOCALIZED AND SORTED BY DATE WITH THE MOST RECENT ENTRY AT THE TOP)
Re-assigned**	Checked	Registered	Yes	2	- Assigned by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM Comments: () - Approved by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM - Registered by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: ()
Newer version assigned**	Not checked	Approved	No	1	Assigned by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM Comments: Initial Request
Newer version assigned**	Not checked	Approved	Yes	1	Assigned by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM Comments: ()
Newer version assigned**	Checked	Registered	No	2	- Assigned by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM Comments: Initial Request - Approved by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM - Registered by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM
Newer version assigned**	Checked	Registered	Yes	2	- Assigned by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM Comments: () - Approved by User First Name Last Name (User ID) on mm/dd/yyyy/ hh:mm:ss AM/PM - Registered by User First Name and Last Name (User ID) on mm/dd/yyyy hh:mm:ss AM/PM Comments: ()

TRAINING STATUS	AUTOMATICALLY REGISTER USERS CHECKBOX	FINAL STATUS	COMMENTS ADDED?	ENTRIES*	TRANSCRIPT HISTORY ENTRIES (WILL BE LOCALIZED AND SORTED BY DATE WITH THE MOST RECENT ENTRY AT THE TOP)

* Entries in Transcript History

** Training is already on user's transcript

Implementation

To assign training to users who may not be under the direct supervision of the assignor, the Assign Training with Constraints permission is required.

To enable this functionality, go to the Feature Activation tile in LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES.

After activation, the permission Assign Training with Constraints will be added to your System Administrator security role, providing the capability to assign training to users within specified constraints using the new workflow.

Administrators can deactivate the feature in Feature Activation Preferences if necessary. Deactivation will revert to the legacy User Interface for assigning training.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assign Training with Constraints	This permission grants any Role, User, or Organizational Unit (standard and custom, including groups) the ability to assign training to other users. This permission, along with its constraints, seamlessly integrates with the existing Assign Training permission. Users with either the new permission or both will be redirected to a new interface and will use the constraints associated with the Assign Training with Constraints permission. This permission can be constrained by the following: • User's direct subordinates • User's subordinates • User's Organizational Unit - Standard and Custom • Organizational Units (including Groups) - Standard and Custom • Provider • Training Type • Training Item (specific training) • Restrict to Employee Relationship	Learning - Administration

| | | Multiple constraints on the permission between User/OU and LO are treated as AND constraints, whereas constraints between User/OU are treated as OR constraints. | |

Assign Training Page Features

Assign Training Fields Overview

The following fields are available on this page:

- **User Selection:** A checkbox near the Employee column allows the selection of all users on a specific page. A maximum of 1000 users can be selected, and a notification appears if the selection exceeds this limit.
- **Show Selected:** This toggle when activated, shows only the users selected for the training assignment.
- **Training Purpose:** A dropdown is available with training purposes from the Course Catalog.
- **Due Date:** A calendar icon is provided for selecting a due date.
- **Add a Comment:** Allows users to input comments or instructions related to the training assignment.
- **Automatically Register Users:** Selecting this checkbox automatically registers users for training in a Registered status. This feature is disabled for Events, as automatic registration is not possible. Additionally, it is disabled when the training has an associated price, requiring payment before registering.
- **Cancel:** Redirects the user to the Learning Details page for the selected training.
- **Back:** Redirects the user to the user selection step.
- **Submit:** Redirects the user to the Learning Details page for the assigned training.

Additional Features

- Consistent presentation of key details for the following Learning Object (LO) types:
    - Materials
    - Online Courses
    - Tests
    - Videos
    - Events
    - Sessions
    - Curricula
    - External Content
- For all these types of learning materials, the following details are available:
    - Training Title
    - Training Type
    - Provider
    - Training Hours
    - Price (if applicable) / Training Units
    - Available languages
    - Rating (if enabled)
- Specific Details for Certain LO Types:
    - Version available for Materials, Online Courses, Tests, Curricula
    - Session Information is available for Start date/time, End date/time, Locator Number, Session ID, Seats Available
- These user details are available:
    - Employees (Employee name)

- User ID
- Division
- Position
- Direct Manager
- Location
- Assignment History
- Current Status
- Language equivalence
- Cost center

- Breadcrumb Navigation: Breadcrumb navigation to guide users through each step they have taken to access a LO they want to assign.
- User Details: Employees, User ID, Division, Position, Direct Manager, Assignment History and Current status details are shown for the selected users.
- Pagination:
  - Select Users List: Paginated view when the number of users exceeds 25, with a default of 25 users per page.
  - Pending Users List: Pagination view when the number of users exceeds 50 users, with the number of users being assigned displayed in the bottom right-hand corner.
- A warning message will be displayed when assigning a training that has a prerequisite, pre-work or post-work associated with it.
- Once the training assignment is submitted:
  - If it is not successful due to any reason, an error toast message will be displayed for 5 seconds on the page stating: "An error has occurred. Assignment could not be completed."
  - If the assignment is submitted without any error, a toast notification will be shown on the Learning Details page or the Learner home page stating: "Assignment Submitted"
- While assigning Events/Sessions/External Content to individuals who already have these Learning Objectives on their transcript, a notification will be displayed: "Users who already have this training on their transcript are not eligible for a new assignment."

Assigning Session without Session - Edit Permission without Waitlist

If the user assigning training does not have the Session - Edit permission and the waitlist is not enabled for the session, a notification "The total number of users exceeds available seats for the session. Please reduce the number of selected users or choose a new session." will be shown during the assignment process when the following occurs:

- The number of selected users exceeds the available seats for the session.
- The selected users belong to an organizational unit (OU) with reserved seats, but there are not enough reserved seats available for that OU.
- There are reserved seats setup in Instructor Led Training (ILT) Administration, and the maximum number of reserved seats has already been allotted.

The **CONTINUE TO DETAILS** button will be disabled if the number of selected users is greater than the seats available.

Assigning Session without Session - Edit Permission with Waitlist

If the user assigning training does not have the Session - Edit permission and the waitlist is enabled for the session, a notification "The total number of users exceeds available seats for the session." will be shown during the assignment process when the following occurs:

- The number of selected users exceeds the available seats for the session.
- The selected users belong to an organizational unit (OU) with reserved seats, but there are not enough reserved seats available for that OU.
- There are reserved seats, and the maximum number of users is already registered for the session.

The notification will also be displayed under the Additional Details section along with a disabled checkbox titled "Add additional users to the waitlist". This checkbox cannot be unchecked.

Assigning Session with Session - Edit Permission without Waitlist

If the user assigning training has the Session - Edit permission and the waitlist is not enabled for the session, a notification "The total number of users exceeds available seats for the session." will be shown during the assignment process when the following occurs:

- The number of selected users exceeds the available seats for the session.
- The selected users belong to an organizational unit (OU) with reserved seats, but there are not enough reserved seats available for that OU.
- There are reserved seats, and the maximum number of users is already registered for the session.

The notification will also be displayed under the Additional Details section along with a disabled checkbox titled "Increase the session's available seats". This checkbox cannot be unchecked.

Assigning Session with Session - Edit Permission with Waitlist

If the user assigning training has the Session - Edit permission and the waitlist is enabled for the session, a notification "The total number of users exceeds available seats for the session." will be shown during the assignment process when the following occurs:

- The number of selected users exceeds the available seats for the session.
- The selected users belong to an organizational unit (OU) with reserved seats, but there are not enough reserved seats available for that OU.
- There are reserved seats, and the maximum number of users is already registered for the session. In this case, maximum seat allotted can be increased or users can be added to the waitlist.

The notification will also be displayed under the Additional Details section along with a message: "The total number of users exceeds available seats for the session. Select one of the options below". This selection only applies to users who are automatically registered into the session. Two radio buttons will be available:

- Increase the session's available seats
- Add remaining users to the waitlist

Accessing Versioned Training in Certifications

 Prior to this enhancement, when a training within a certification was versioned, some learners could not see and interact with the training. Therefore, the administrators either enabled Override LO Availability on the certification as a workaround or asked learners to search for the training outside the certification.

With this enhancement, the learners can see and interact with the versioned training directly from the certification, even if the Override LO Availability is not enabled. The administrators no longer must enable override availability as a workaround or ask learners to search for the training outside the certification.

To learn more about Override LO Availability functionality, *See Certification - Create - Step 1 - General.*

How Does this Enhancement Benefit My Organization?

- It improves usability by allowing learners to interact directly with the versioned training inside the certification.
- Administrators can configure a certification to leverage the training's availability set in the course catalog.

Use Case - Accessing versioned training in Certifications

Ava Employee is enrolled in the Annual Compliance 2024 certification that contains these two materials. Override LO Availability is not enabled on the certification. The material Code of Ethics was versioned from version 1 (V1) to version 2 (V2), and Ava was excluded from the versioning.

Before this enhancement

After versioning it, Ava did not see the Code of Ethics 2024 material when accessing her certification.

CERTIFICATION						
TITLE	**TYPE**	**CREDITS**	**STATUS**	**OPTIONS**	**CREDITED**	**DETAILS**
Initial (Required Credits: Min = 2.00, Max = 2.00 / Acquired Credits: 0.00)						
Compliance 2024	Material	1.00	In Progress	Mark Complete | Launch	No	

After the enhancement

After versioning, Ava can see the Code of Ethics 2024 material when accessing the certification and take action.

CERTIFICATION						
TITLE	**TYPE**	**CREDITS**	**STATUS**	**OPTIONS**	**CREDITED**	**DETAILS**
Initial (Required Credits: Min = 2.00, Max = 2.00 / Acquired Credits: 0.00)						
Code of Ethics 2024	Material	1.00	In Progress	Mark Complete | Launch	No	
Compliance 2024	Material	1.00	In Progress	Mark Complete | Launch	No	

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 - 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

Allow Session Completions to be Credited Toward Curricula

Prior to this enhancement, when there were standalone sessions on a learner's transcript, the session with the greatest registration number was mapped to the curriculum during a curriculum assignment. This could lead to a session completion not propagating to the parent curriculum if the session was completed in a prior registration (not the most recent). Therefore, the learner was not credited for session completion inside a curriculum even though a prior completion exists.

With this enhancement, when a curriculum is assigned with "Assign New Occurrence" (ANO) turned off, the learners are credited with a session completion inside the curriculum if they have ever completed the session contained in the curriculum. It allows learners to receive credit for a completed session despite having another non-completed registration.

If a curriculum is assigned with "Assign New Occurrence" (ANO) on and "Maintain Progress" on or off, the session with the greatest registration number will continue to be mapped to the curriculum.

Enhancement "Rules"

When a curriculum is assigned, the session with the greatest registration number is mapped to the event under the curriculum. After this enhancement, mapping to the greatest session registration number will only occur when a curriculum is assigned with ANO turned on (Maintain Progress can be on or off.) If a curriculum is assigned with ANO turned off, then any session completion will count towards the event completion inside the curriculum.

Event Reg Num	Session Sataus	Prior Session Status under curriculum	New Status	LAT Setting
1	Completed			
2	Completed	Completed	Completed	ANO off, ANO on
1	Completed			
2	Non-completed (withdrawn, cancelled, no show)	Event in Approved	Completed with Reg Num 1	ANO off
		Event in Approved	Event in Approved	ANO on (keep current behavior)
1	Completed			
2	Registered	Registered	Completed with Reg Num 1	ANO off
		Registered	Registered	ANOon (keep current behavior)
1	Completed			
2	Non-completed			
2	Registered	Registered	Completed with Reg Num 1	ANO off
		Registered	Registered	ANO on (keep current behavior)
			*Should be completed with most recent reg num	

Cheat-Sheet

LAT SETTING	RULE	CHANGE IN BEHAVIOR?
Curriculum assigned with ANO off	Any session completion is considered and propagated to the event inside the curriculum.	Yes
Curriculum assigned with ANO on + MP on	Session associated with event's greatest registration is propagated to the event inside the curriculum.	No

LAT SETTING	RULE	CHANGE IN BEHAVIOR?
Curriculum assigned with ANO on + MP off	Session associated with event's greatest registration is propagated to the event inside the curriculum.	No

How Does this Enhancement Benefit My Organization?

- It assures the administrators that learners are rightfully credited for session completions inside their curricula.
- It leads to less administrative burden in adjusting completions.
- The managers and instructors do not have to track why session completions are not propagated to curricula.
- The end users receive credit for session completions in their curricula without contacting managers, instructors, or administrators.

Frequently Asked Questions (FAQs)

Why are we changing the logic of how session completions propagate to curricula?

Based on customer feedback, we heard that customers want a way to ensure any session completion is credited when a curriculum is assigned. This enhancement will support this use case. Also, when assigning training with 'ANO' off, the intended result is to ensure that trainings are not recompleted. We wanted to extend this logic to Events/Sessions.

Will this feature be retroactive?

No, this will only impact curricula being assigned without 'ANO' in the future.

What do I do if I don't want prior session completions to count towards an assigned curriculum?

Assign the curriculum with 'ANO' on. Maintain Progress can be on or off.

How will my curriculum be impacted when it is versioned?

This logic does not impact versioning, only the initial assignment. If a curriculum is later versioned, whatever status the Event is in will be maintained after versioning.

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	Learning - Administration

	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.	
Assignment Tool - Standard	Grants ability to create Standard (one-time) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration

Curricula Administration Search to Enhanced Search

Prior to this enhancement, the Curricula Administration used SQL-based Traditional Search to return results. SQL has a longer processing time for large data sets and is less scalable as data grows over time.

With this enhancement, Enhanced Search is enabled as the default search setting in Curricula Administration, which utilizes Enhanced Search to provide results based on relevance. It continues to support all filters in Curricula Administration, and no administrator action is required.

A preference is available so administrators can switch to Traditional Search (SQL). To access this preference, navigate to MENU > ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > CURRICULA PREFERENCES. Turn on the **Enable Enhanced Search on Curricula Administration Search** toggle to activate Enhanced Search.

How Does this Enhancement Benefit My Organization?

- Enhanced Search is a more performant, scalable, and results-driven way to power a search framework.
- Administrators utilizing the Curricula Administration Search can search for training using Enhanced Search.

Considerations

- The current search results are sorted alphabetically. However, the Enhanced Search results are displayed by Relevance by default.
- 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 will be updated within Enhanced Search results within 15 minutes or less, with few exceptions.

- The learning object 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 learning object was created or updated at the exact moment of an update to the data set. In this case, we 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, the Enhanced Search searches across Title, Description, and Keywords. Enhanced Search only considers the Title when completing a search for the Curricula Administration Search.

Will we be able to change the search framework if we choose?

Yes. Administrators can change the search framework from Enhanced Search to Traditional Search if they choose or if it is better for your portal. This can be done by navigating to Curricula Preferences and scrolling down to "Enable Enhanced Search on Curricula Administration Search."

How can I tell if my portal has been updated?

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

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.

Implementation

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

The update may take up to 20 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
Curricula Preferences	Grants ability to configure Curricula Preferences, which grants the ability to allow or disallow the same learning object (LO) from being added to multiple recurring curricula. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
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.	Learning - Administration

	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.*	
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
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

Curriculum Player 2.0 (Early Adopter)

Curriculum Player 2.0 (Early Adopter)

The Curriculum Player 2.0 is an improvement on the legacy Curriculum Player that provides users with a straightforward path to completing their curriculum. It is fine-tuned to offer a modern user interface while addressing complex workflows.

Until now, Curriculum Player 2.0 (Milestone 3) has been available to customers in an open beta and only in stage portals. With this release, Curriculum Player 2.0 (Milestone 4) is also available for customers to enable in production portals as early adopters.

The Curriculum Player 2.0 (Milestone 3) contained the following features:

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

The key features of Curriculum Player 2.0 (Milestone 4) include:

- New and improved UI/UX with color-coordinated indicators for completed and past-due training.
- Support for Online Content (OCLO), Observation Checklists, Forms.
- Saving user context (which training the learner was last on) when re-launching a curriculum.
- Support for manager and administrator actions when viewing a learner's curriculum.
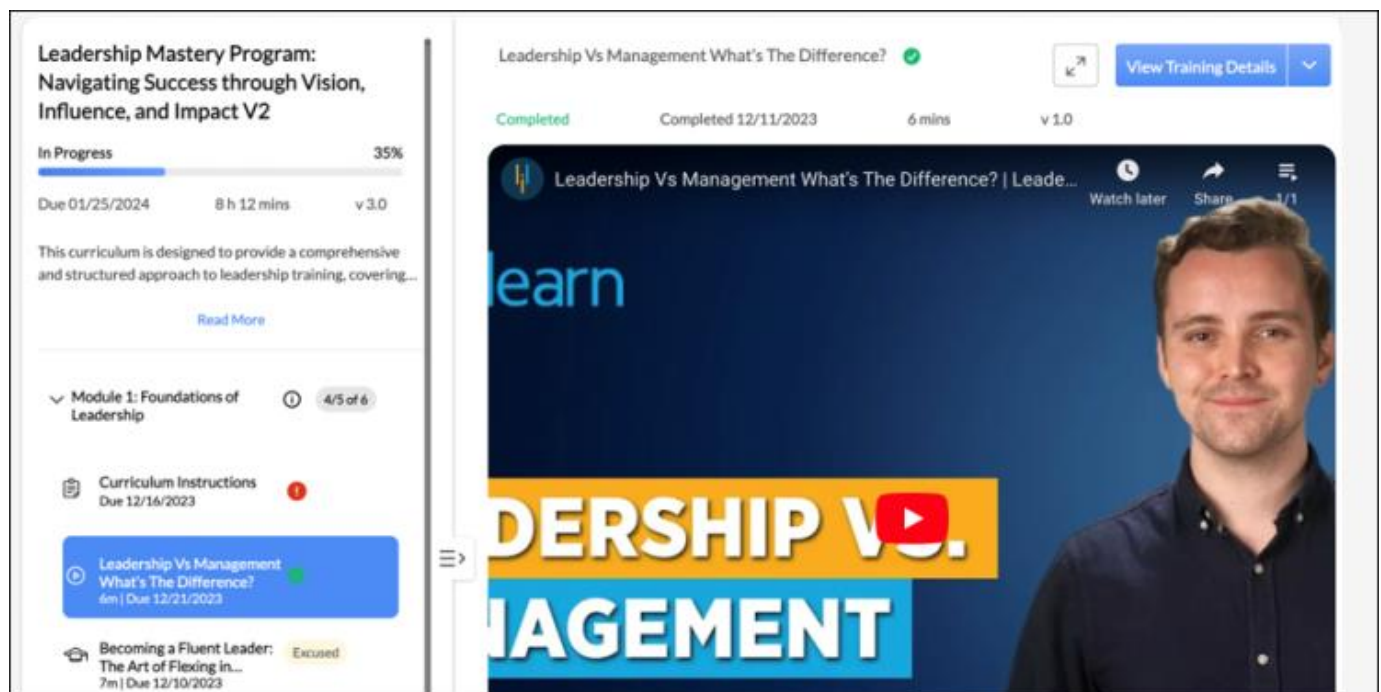
How Does this Enhancement Benefit My Organization?

- Improved workflows to minimize administrative involvement with functionality or process questions.
- Increase in curriculum engagement.
- Intuitive design that guides users through training completions

- Supports 90% of existing curriculum features.

Considerations

- The Curriculum Player 2.0 does not support VILT yet.
- For July Release, we will be adding a new field to the Edge Import "Curriculum" load type so that the "Curriculum Player" radio button can be updated in bulk.
- We have started to work on the responsiveness of the player but will continue streamlining responsiveness through the next release.
- We are still working through all WCAG requirements, which will be finalized in the next release.

Implementation

This functionality is available to all organizations using the Learning module.

After the April 5, 2024 patch deployment, administrators can enable or disable the Curriculum Player 2.0 via Feature Activation Preferences, and it is enabled by default for all organizations. When enabled, the Curriculum Player 2.0 radio button is available on the General tab when creating or editing a curriculum. When disabled, the Curriculum Player 2.0 radio button is not available.

You can activate the Curriculum Player 2.0 for any curricula in any environment by selecting the "Curriculum Player 2.0" radio button on the General tab when editing a curriculum. The "Training Details Page" is the flat view of the curriculum, seen on the Training Details page. The "Curriculum Player" option is the existing player, and the "Curriculum Player 2.0" is the new inline player. We have maintained your current curriculum settings, so you must change them to see the new player actively.

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.	Learning - Administration

	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.	
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.	Learning - Administration
	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.	
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
Observation Checklist - Verifier	Enables user to serve as the verifier for the observation checklist of another user. This permission should be included in the dynamic security role "Checklist Verifier." The role, when active, is dynamically assigned to any user who is designated as a verifier for one or more checklists. This permission can be constrained by OU and User's OU. This is an end user permission.	Performance
Test Engine - Review	Grants ability to view details of user results for tests, via the test engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

Curriculum 2.0 (EA) - Feature Breakdown

The Curriculum Player 2.0 (Milestone 4) comes with the following key features:

- A new, improved UI and UX with color-coordinated indicators for completed and past-due training.
- Support for Online Content (OCLO), Observation Checklists, Forms.
- Saving user context (which training the learner was last on) when re-launching a curriculum.
- Support for manager and administrator actions when viewing a learner's curriculum.

New, improved UI and UX

- New icons to denote different training types.
- Color-coordinated indicators to express when training is completed (green checkmark) or past due (red exclamation point).
- Info icon for section instructions.
- Tags that denote how many trainings are required per section.
- A new modal that displays curriculum description upon launching a curriculum.
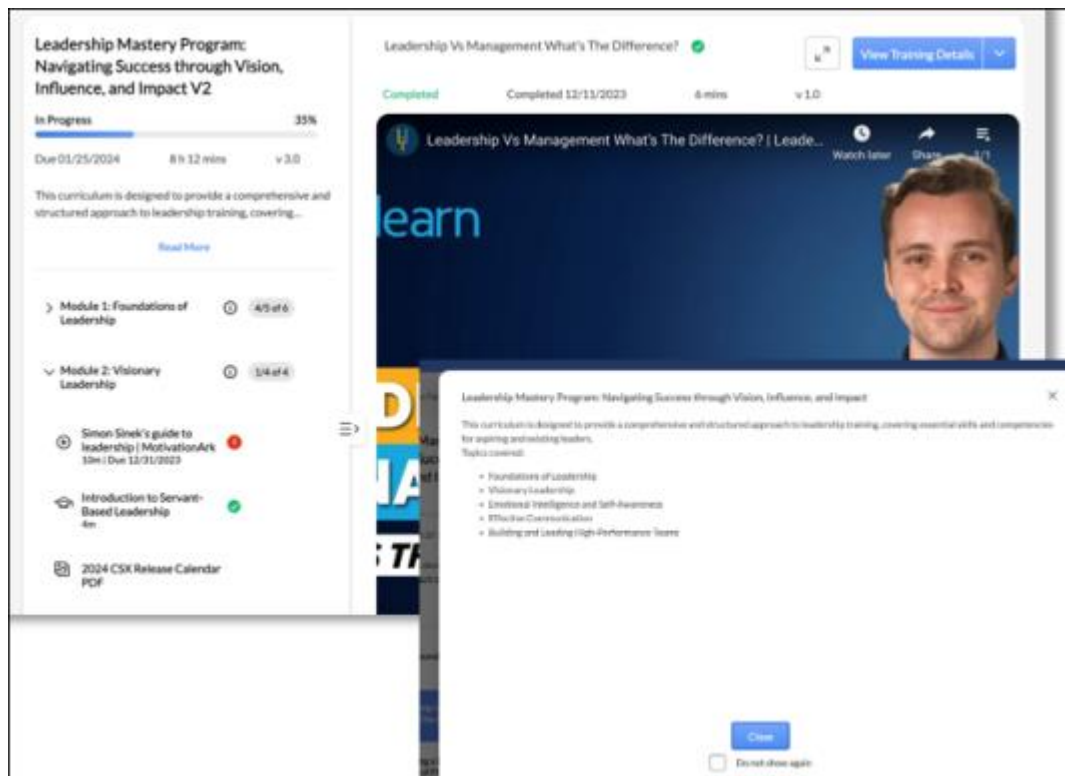
Support for Online Content

- The new player now supports subscription-based Online Content (OCLO).

Support for Observation Checklists

- Observation Checklists are now supported in the new player.
- Checklist contents are displayed inline.

- Clicking 'View Checklist' or 'Validate Checklist' redirects users to the existing UI to complete validation.

Support for Forms

- Forms can be completed and submitted inline in the new player.
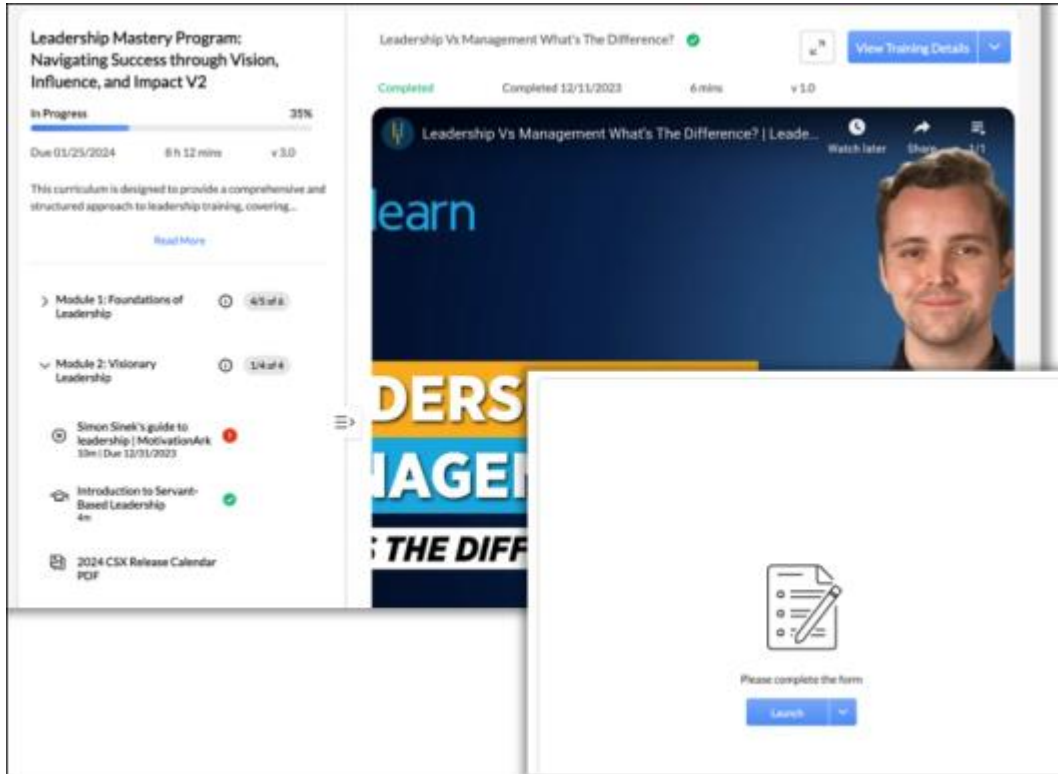
Saving User Context

- Upon re-launching a curriculum, the last training that the learner accessed will be opened by default.

Manager and Admin Action Support

- Managers and Admins can now view learner's curricula and see relevant transcript actions.
- Support for 'Record Observation' action that redirects observers to the observation checklist verifier page.
- Support for 'Review' action for tests that redirects to the test attempt page, where admins can manage attempts.
- Ability to mark training as Exempt using a fly-out.

Leadership Mastery Program: Navigating Success through Vision, Influence, and Impact V2

In Progress   35%

Due 01/25/2024   8 h 12 mins   v 3.0

This curriculum is designed to provide a comprehensive and structured approach to leadership training, covering...

Read More

> Module 1: Foundations of Leadership   ⏱   4/5 of 6

∨ Module 2: Visionary Leadership   ⏱   1/4 of 4

- Simon Sinek's guide to leadership | MotivationArk
  10m | Due 12/31/2023   🔴

- Introduction to Servant-Based Leadership
  4m   🟢

- 2024 CSX Release Calendar PDF

Leadership Vs Management What's The Difference?   🟢   [View Training Details ∨]

Completed   Completed 12/11/2023   6 mins   v 1.0

Leadership Vs Management What's The Difference? | Leade...   Watch later   Share

learn

Mark Exempt   ✕

Indicate Reason

Select a reason ▾

*Comments

Cancel   Confirm

Do Not Show Inactive Trainings on Learner Home

Prior to this enhancement, when inactive training were displayed on the Learner Home training side panel, it would occupy the critical space that should have been reserved for active training.

With this enhancement, the Learner Home training side panel will hide all the inactive trainings and display only the relevant, actionable trainings to the learners. The inactive trainings that will be hidden are as follows:

- Standalone inactive training
- Inactive training inside curricula
- Inactive training inside Cohorts
- Inactive certifications
- Inactive trainings in a 'Not Activated' or 'Pending Prior Training' status, including all other statuses

The inactive trainings will not be displayed in any of the training side panel sections:

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

PAST DUE

2018 IT policies
Not Activated   1356 days past due

Developing Development Plans
Registered / Past Due   770 days past due

•••   Launch

Elizabeth Recurring Child LO #1
Registered   591 days past due

•••   Inactive

9750TFX Sapien 3 Ultra PVL Joint Assembly
In Progress/Past Due   286 days past due

                                      Manage

ASSIGNED / NO DUE DATE

10/24 M1V2
Registered

•••   Launch

10/24 Curriculum V2
In Progress

•••   Open Curriculum

Oct 11 v2
Registered

•••   Launch

Data Privacy 2023
In Progress

•••   Open Curriculum

How Does this Enhancement Benefit My Organization?

- The administrators will no longer receive inquiries on why inactive trainings are displayed on Learner Home.
- The end users can quickly act on trainings that require their attention without inactive trainings cluttering the user interface.

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
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

Email Optimizations for Versioning Performance Improvement

Prior to this enhancement, when creating a new version, the old version email data were copied to the latest version.

This enhancement has improved how emails are stored for curricula, online courses, and materials during child versioning. If an email is unmapped from a learning object (LO), the scheduled emails are canceled if it is associated with more than one LO. If an email is associated with multiple LOs, any modifications to the email result in the cancellation of the scheduled emails and the creation of new emails.

Customers with heavy email usage in terms of custom emails will see improved performance during versioning. For example, for a curriculum, administrators can configure multiple custom emails, re-version the curriculum, and then may see quicker versioning.

Note: *This enhancement improves versioning performance for curricula, online courses, and materials. It does not impact versioning functionality.*

How Does this Enhancement Benefit My Organization?

Improvement in overall versioning time.

Implementation

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

Enhancements to Ability to Revert ILT Sessions inside Curricula (Early Adopter)

Enhancements to Ability to Revert ILT Sessions inside Curricula (Early Adopter)

With the November '23 release, Cornerstone introduced the ability to revert ILT session completion inside curricula if the ILT is part of one or more curricula.

With this enhancement, we continue to improve this functionality and expand on additional use cases to solve for the holistic 'rewinding' of session reverts that impact curricula.

The three additional use cases are as follows:

- Recalculating curriculum completion dates when a session is reverted but the curriculum remains completed.
- Added Transcript History entry when a session is reverted, and the curriculum is in an Approved stats.
- Delete and re-trigger multiple evaluations if a curriculum completion is reverted due to a session being reverted.

Supported curriculum transcript statuses for revert

- Approved
- In Progress
- Pending Evaluation
- Pending Acknowledgement
- Pending Completion Signature
- Pending Completion Approval
- Completed

A Transcript History entry is added when reverting a curriculum in any of these statuses. With this Release, we have added a Transcript History comment for curricula in an Approved status

How Does this Enhancement Benefit My Organization?

- Administrators can be confident that curriculum completion dates are recalculated if a session within a curriculum is reverted and the curriculum remains completed.
- Additional transcript history audits when a revert is submitted for a curriculum in an Approved status.
- Learners can re-complete all evaluations associated with a curriculum if the curriculum completion is reverted due to a session revert.

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.

Enhancements to Ability to Revert ILT Sessions inside Curricula Use Cases

Use Case 1: Recalculating curriculum completion dates when a session is reverted and the curriculum remains completed

Suppose a curriculum is completed, and the last completed training amongst child trainings is a session. Upon reverting that session, if another session was completed and is now mapped to the curriculum, the curriculum completion date is recalculated to consider the new session completion date and other child training completion dates.

Example

- Two "Leadership Workshop" sessions were attended. One was completed on October 1st, and another on December 18th.
- The "Leadership Workshop" is contained in the "Leadership Excellence" curriculum.
- The other child training in the "Leadership Excellence" curriculum was completed on November 15th.
- Therefore, the "Leadership Excellence" curriculum has a December 18th completion date.
- When the December 18th "Leadership Workshop" session is reverted, the completion for the October 1st session is credited to the curriculum.
- The curriculum "Leadership Excellence" will now show a completion date of November 15th (the latest completion date amongst child trainings) and Transcript History will be updated.

Use Case 2: Added Transcript History entry when a session is reverted, and the curriculum is in Approved status.

A curriculum can be assigned in an Approved status with a completed session only if the session is optional. This means that the curriculum contains a section with optional training (for example, 0 of 1 required in the section), and a session is completed as optional training.

With this enhancement, a Transcript History entry is added when a curriculum is in an Approved status and the completed optional session is reverted.

Example

- The curriculum "New Hire Onboarding" contains two online courses in one section with 2 of 2 required. Another section is created with 0 of 1 required, and an event "Orientation" is added to this section.
- Jane attends a session for "Orientation" on January 5th.
- The "New Hire Onboarding" curriculum is assigned to Jane in an Approved status or moves to an Approved status after manager approval
    - Child trainings are not set to auto-register
    - Curriculum is not set to auto-register
- Suppose Jane's January 5th session completion is reverted. In that case, the "New Hire Onboarding" curriculum will remain in an Approved status, and there will be an entry in Transcript History noting that the curriculum was reprocessed due to a session revert.

Use Case 3: Delete and retrigger multiple evaluations if a curriculum completion is reverted due to a session being reverted.

Before this Release, when a curriculum completion was reverted due to a session revert, it would delete only one evaluation associated with it, which would be re-triggered upon completing the curriculum again.

If multiple evaluations are associated with a curriculum, all evaluations are deleted and re-triggered upon re-completing the curriculum.

Example

- The curriculum "New Hire Onboarding" has a level 1 and 2 evaluation enabled.
- Upon completing the curriculum, "New Hire Onboarding," both level 1 and level 2 evaluations were completed.
- Session "Orientation," contained in the curriculum "New Hire Onboarding," is reverted, causing the curriculum to move from Completed to In Progress status.
- Both completed evaluations are deleted and can no longer be reported on
- When another "Orientation" session is attended, causing curriculum "New Hire Onboarding" to be complete, both level 1 and level 2 evaluation will be re-triggered.

Global Search (Training) - Deprecation of Traditional Search with the November 2024 Release

With the introduction of Enhanced Search in Global Search, Cornerstone is planning to deprecate the SQL-based legacy Traditional Search for Global Search in November 2024.

The Enhanced Search is a more performant, scalable, and results-driven way to power a search framework. It allows us to provide better, faster searches. The Enhanced Search supports most filters currently used in Global Search (Training).

How Does this Deprecation Impact My Organization?

- Administrators can no longer transition the Global Search (Training) page back to Traditional Search (SQL) using Search Preferences.
- Using Enhanced Search as the default framework for Global Search provides end users with a consistent and unified experience while providing better, faster search results.

Deprecation Milestone

- March 2024: Traditional Search Deprecation Announcement.
- July 2024: Removal of the Global Search Traditional Search Preference in the user interface. Administrators can no longer configure Traditional Search in their portal. No changes are made to customer settings.
- November 2024: Traditional Search is deprecated from Global Search – Training. Any remaining customers using Traditional Search will have their portals updated to use Enhanced Search.

Considerations

- All filter configurations (except for Title, Keyword, and Description) for Global Search (Training) remain unchanged. The administrators require no action to continue using the same filters once the default change has been made.
- In most cases, a newly created or updated learning object is updated within Enhanced Search results within 15 minutes or less, with few exceptions.
    - The learning object 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 learning object was created or updated at the exact moment of an update to the data set. In this case, we'd expect the learning object to be available beyond 15 minutes time-frame.
- All filters use an 'AND' operation when Enhanced Search is enabled. This includes Custom Fields, which currently uses an 'OR' operation when Traditional Search is enabled.

Frequently Asked Questions (FAQs)

Is Cornerstone open to making updates or improvements to search before the deprecation occurs?

Yes. We love to hear feedback and how search can be improved. Our data tells us less than 1% of customers have moved back to Traditional Search since the default change was made in July 2023. If you are one of those customers, we would love to hear from you in Suggestion City.

Are there any changes being made as a part of this release?

No. No changes will be created to your Global Search (Training) preferences or the search framework you use for the March 2024 release. This is an announcement so customers can make changes as needed.

Will we be able to change the search framework if we choose?

Yes. Administrators can change the global search framework from Enhanced Search to Traditional Search if they choose or if it is better for your portal. This can be done by using the search preference. However, we plan to remove this preference as a part of the July 2024 release.

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.

How are search results determined?

Search results are weighted using a relevancy scoring system. For more information regarding Enhanced Search Scoring and Search Tokenization, please *See Learning Search vs. Traditional Search.*
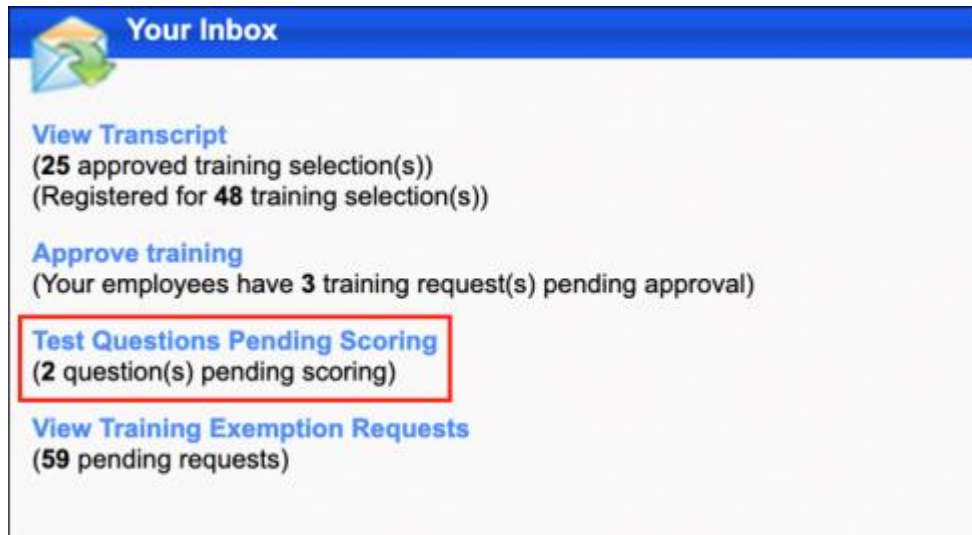
We use Global Search (Training) to populate search results in other areas, including custom widgets. Will that be affected?

Suppose you are using the results from Global Search (Training) to populate results from other pages of the application. In that case, there is a possibility the results will be updated to use Enhanced Search. We recommend testing the updated results in stage portals or other lower environments.

Inactive User Handling on Inbox Widget and Test Grader Page

Prior to this enhancement, the "Test Questions Pending Scoring" section of the Inbox widget also counted inactive users. If the numbers were inconsistent, it led to confusion when accessing the Test Grader page.

With this enhancement, inactive users are no longer counted in the "Test Questions Pending Scoring" section of the Inbox widget nor displayed on the Test Grader page by default. The "Test Questions Pending Scoring" section of the Inbox widget only considers active pending scoring users. For the Test Grader page, administrators can choose to view inactive users pending grading by selecting the "Include Inactive Users" checkbox.
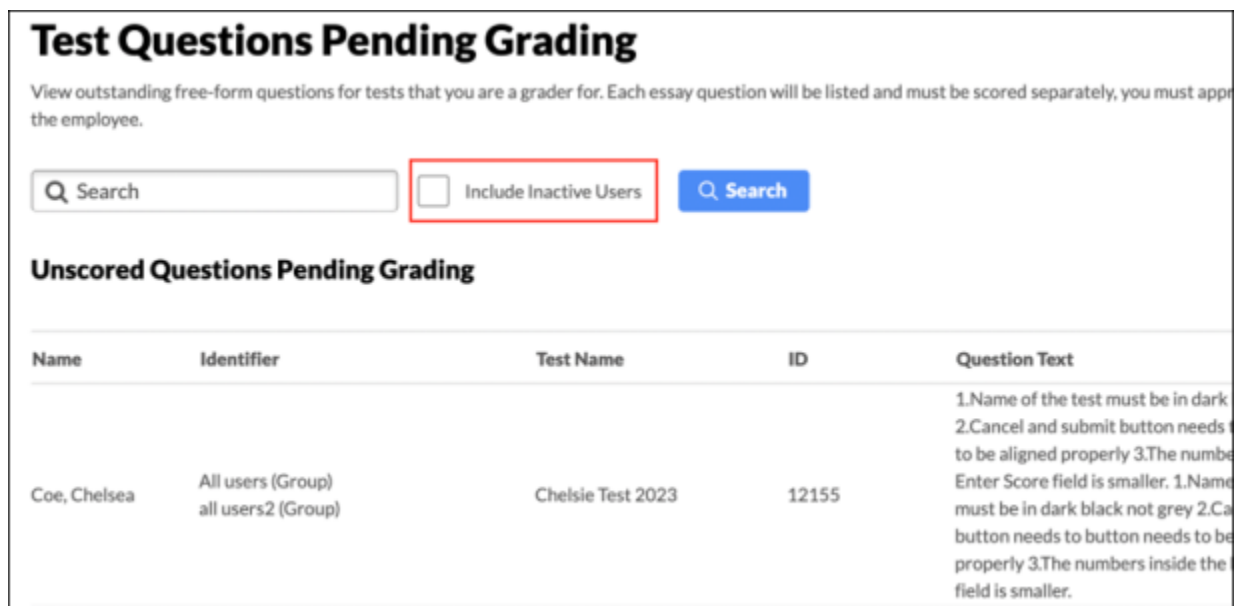
How Does this Enhancement Benefit My Organization?

- It provides a decluttered view to focus on active learners who are pending grading.

- It allows consistency in the number of users pending grades shown in the inbox widget and on the Test Grader page.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Test Engine - Grader	This permission is not visible within the system because it is a dynamically assigned permission that is assigned to a user when they are added to a test as the grader. Users with this permission can access the Test Questions Pending Grading page. Constraints can be applied to this permission by applying constraints to the Test Engine Grader Constraints permission.	Learning

Enablement of Learning Administration User Interface Modifications and Deprecation of Legacy Pages with the July '24 Release

Cornerstone introduced a modernized look and feel for the most used learning administration pages with the July '23 and November '23 releases. These user interface (UI) page changes are currently available for customers to review in the pilot stage and can be self-enabled in production. At the start of User Acceptance Testing (February 22, 2024) the new user interface updates for learning administration pages will be auto-enabled in all customer stage portals. We want to provide customers with time to test, update documentation, and prepare for the adoption of the user interface changes.

We have completed our planned user interface work for the most frequently used learning administrator pages. We will continue to focus on other projects, such as admin usability, which will focus on user interface and user experience enhancements.

What do I need to know about CSX Learning Administration User Interface Updates?

Over the past releases, we have modified the key learning administration UI pages to improve user experience. The modifications included:

- Clarifying and simplifying actions by removing icons and adding straightforward text.
- Improving table interactions by supporting scrolling, zooming, and freezing important actions when scrolling and zooming.

The new user interface (UI) changes are available for customers to review in pilot and stage portals and can be self-enabled in production portals. Customers can use feature activation to activate or de-activate the UI pages in pilot, stage, or production portals. At the start of User Acceptance Testing (February 22, 2024), the new user interface updates for learning administration pages will be auto-enabled in all customer stage portals. With the March 2024 Release, the new user interface (UI) for learning administration pages will be automatically enabled in stage, pilot, and production portals. Still, customers can disable the new UI modifications. With the July 2024 Release, the new UI updates for learning administration pages will be automatically enabled in all portals, and the legacy UI pages will be permanently disabled.

CSX Learning Administration User Interface Milestones

- March 22, 2024: All customer portals will have the new learning administrator user interface pages automatically enabled on March 22, 2024. Customers can use feature deactivation to disable if they are not ready for the changes.
- July 26, 2024: All customer portals will have the new learning administrator user interface pages automatically enabled on July 26, 2024, and the legacy UI pages will no longer be available. Customers cannot disable the new pages and revert to legacy UI. The customers who are disabled in March will be auto-enabled in July.
- 2024 and beyond: Cornerstone will continue to focus on improving administrator usability which will include both user interface and user experience changes.

Feature Activation Preferences - User Interface Modifications Activation

All UI preferences are enabled automatically in stage portals on February 22. All UI preferences can be enabled in production portals 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.

What do I need to know about deprecation of pages?

With the July 2024 Release, the new UI updates for learning administration pages will be automatically enabled in production portals, and the legacy UI pages will be permanently disabled.

Deprecation Milestones

- February 22, 2024: All Stage portals have new UI enabled. The new UI in Production portals need self-activation.
- March 22, 2024: All customer portals will have the new learning administrator user interface pages automatically enabled on March 22, 2024. Customers can use feature deactivation to disable if they are not ready for the changes.
- July 26, 2024: All customer portals will have the new learning administrator user interface pages automatically enabled on July 26, 2024, and the legacy UI pages will no longer be available. Customers cannot disable the new pages and revert to legacy UI. The customers who are disabled in March will be auto-enabled in July.

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.

How Does this Enhancement Benefit My Organization?

- A more modernized and intuitive UI that helps clarify actions leads to a more simplified and efficient administration experience.
- A more modernized and intuitive UI to simplify the approval process for training requests.

Considerations

We have not introduced any new pages or page updates for the March 2024 release.

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 July 26, 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 new UI pages are automatically enabled in stage portals on February 22. All new UI pages are automatically enabled in pilot and production portals on March 22. All customers who already have the new user interface pages turned on in production will continue to have these pages on. The customers can choose to self-disable new UI pages until July 26, 2024.

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

Learner Home - Skills Carousels

Learner Home - Skills Carousels

Prior to this enhancement, the Cornerstone Learning Management System (LMS) had various ways for learners to add the skills they were interested in developing and skills critical to success in their role. However, the learners had to dig into their profiles or conduct searches to view training related to these skills.

With this enhancement, Learner Home now includes two new skills carousels that help learners view and access training related to their skills directly on Learner Home. It displays content tagged to skills in a learner's skills profile. The skills carousels update based on data from the learner's skills profile. It helps learners optimize their skills and the skills they want to develop.

The two new carousels that are available to be configured to Learner Home are:

- Based on Skills You Want to Develop
- Based on Your Critical Skills

Configuration of Skills Carousels in Learner Home

The new skills carousels are disabled by default. An administrator can customize the configuration and add or remove the carousels at any time. To enable the skills carousels, go to ADMIN > PREFERENCES > LEARNER HOME PREFERENCES > SCROLL TO CONTENT ARRANGEMENT. Under the **Based on Skills You Want to Develop** and **Based on Your Critical Skills** section, click **DISABLED** to activate the skills carousels.

How Does this Enhancement Benefit My Organization?

- The ability for administrators to display training to end users by skills in a scalable way.
- Accelerate skill development with targeted learning.
- Improve employee experience by improving skill development and visibility.

Frequently Asked Questions (FAQs)

I enabled the Skills Carousels through Learner Home Preferences, but I do not see the Carousel on Learner Home. Why not?

There are a few reasons why the Skills Carousels may not show on Learning Home. Either no content is available to that user that has been tagged with the relevant Skills, the user has not added skills to Critical Skills or Skills I want to Develop portion of the Skills Profile or no content has been tagged with skills.

What is Content Skills Tagging?

Skills tagging refers to adding Skills to the catalog's content. Skills tagging can be done through automated Skills tagging or Edge Import. For more information, *See Capabilities Preferences - Content Skills Tagging. See Training Capabilities - Content Skills Tagging.*

I updated skills in my skills profile, but the carousel(s) have not been updated right away. Is that expected?

Yes. Please allow up to 30 minutes for each carousel to update if changes are made in the skills profile or if data is changed in the catalog.

Implementation

This functionality is available for all organizations using the Learning module. Enablement is required through Learner Home Preferences.

Permissions

The following existing permissions apply to this functionality:

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

New Skills Carousels

The two new carousels that are available to be configured to Learner Home are:

- Based on Skills You Want to Develop
- Based on Your Critical Skills
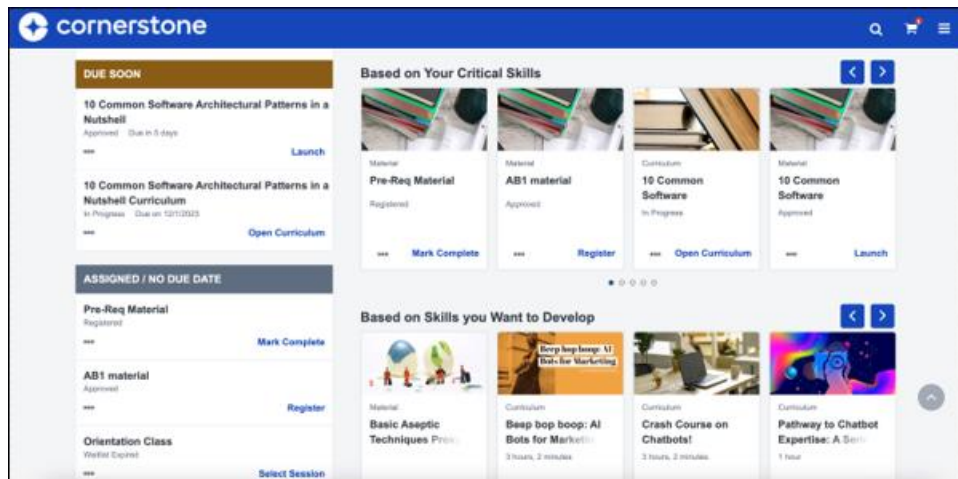
The "Based on Skills you Want to Develop" carousel

- The "Based on Skills you Want to Develop" carousel shows the Learner training that has the skills they have identified in the related section of the Skills Profile.
- The training included in the carousel has at least one skill that matches the skills identified by the learner.
- If a training matches with more skills, that training is shown first. If trainings have the same number of skills, they are shown to the user using the ratings of the course.
- If there are more than 20 possible training to show, an even number of training is shown per skill to allow the Learner to choose from when the number of matching skills is the same.

The "Based on Your Critical Skills" carousel

- The "Based on Your Critical Skills" carousel shows the learner training that has the skills they have identified in the related section of the Skills Profile.
- The training included in the carousel has at least one skill match to skills identified in the Critical Skills portion of the Skills Profile.
- If the Learner has multiple critical skills with multiple pieces of training available to show, training is shown based on the difference in the learner's target compared to the rating.
- If there are more than 20 possible training to show, an even number of training is shown per skill to allow the Learner to receive a variety of training with different skills to choose from.

Learning Search Skills Filter - View All Skills

Prior to this enhancement, learners could only access up to 50 skills at a time. While the current filter effectively shows the skills with the most matches, learners often search for a specific skill or skills to filter from.

With this enhancement, the learners can search, view all skills, and apply any skill as a filter to choose which skills they want to view explicitly. It helps learners quickly access and find the specific skill they seek. It also allows them to see all the training associated with that skill in the catalog.

On the Learning Search page, once a user clicks **VIEW ALL** under the Skills filter, a **View all skills** modal shows all active skills in the portal.
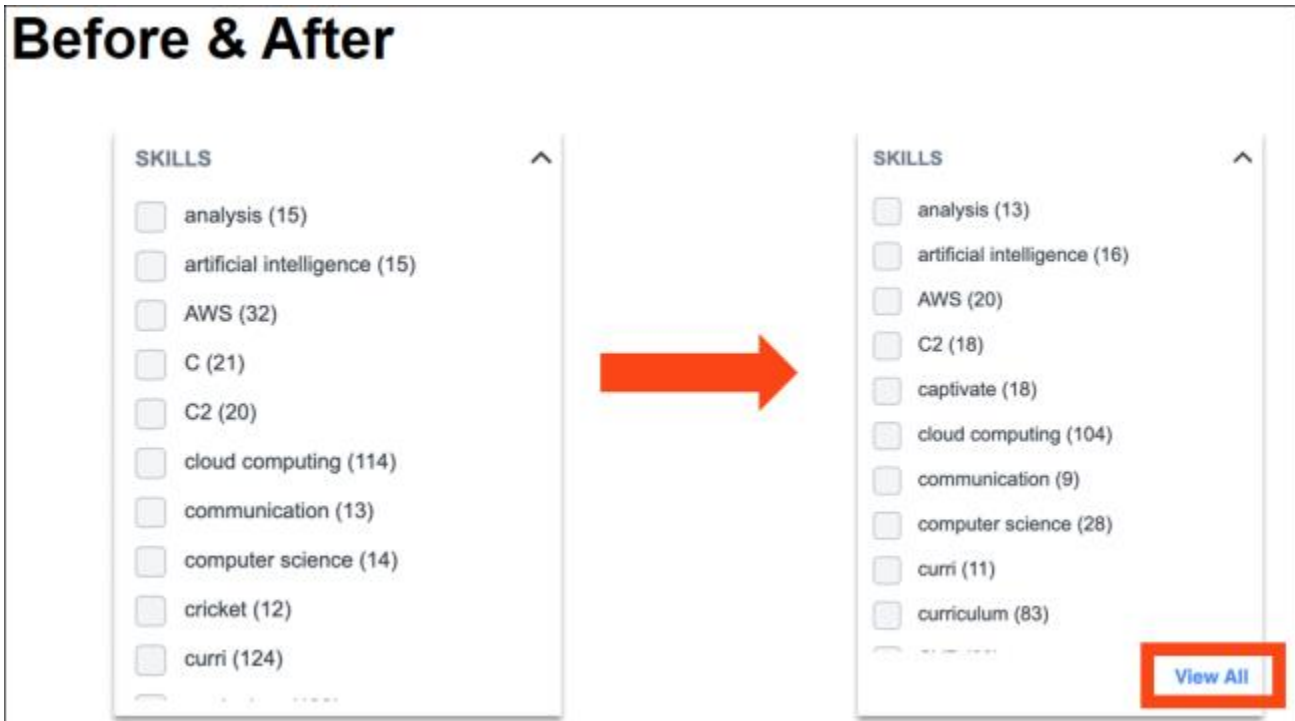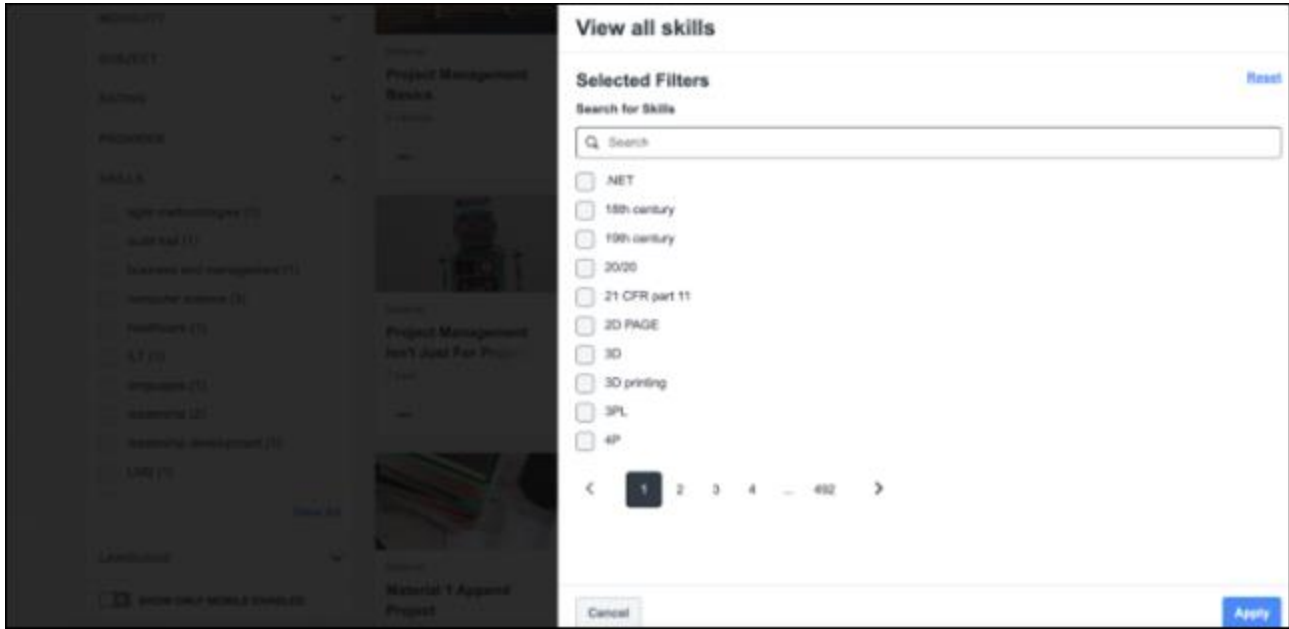
In this modal, the user can search the list and select the skill or skills they are interested in. Selected Skills are presented at the top of the flyout and can be removed anytime. Once the user saves their choices, the flyout is closed, and the user is presented with an updated search result with the selected Skills.

Note: *The Skills filter in Learning Search can be activated via Learning Search Preferences. To read more, See Learning Search Preferences.*

How Does this Enhancement Benefit My Organization?

Learners can now filter on any skill they are interested in finding training in rather than being limited to a maximum of 50 skills per search.

Frequently Asked Questions (FAQs)

What happens if I select a skill that does not produce any results?

The user will be shown an empty state, asking to update their search. At this time, a user can change their filters or remove an added filter.

I had previously selected a skill, and that skill was removed upon changing a different filter. Is that expected?

Yes. The filter used on Learning Search is dynamic. This means that it only shows options to the user that will produce a search result or have matches to the current search query. If a filter is removed, there would have been zero matching results.

Why don't I see the Skills Filter in Learning Search?

The Skills Filter is configurable in Learning Search Preferences. To ensure you can see the Skills Filter, navigate to ADMIN > PREFERENCES > LEARNING SEARCH PREFERENCES. Scroll down to Filter by Skills (Capabilities) and turn on the **Enable Filter by Skills (Capabilities)** toggle to enable it.

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

There are two reasons why the Skills (Capabilities) filter does not show on Learning Search. Either no content that has been tagged with Skills (Capabilities) is available to that user, or no content in the search results has Skills (Capabilities) tagged to it. Please note that to view the "View All" link, at least 1 Active Skill must match the search results.

What is Content Skills Tagging?

Skills tagging refers to adding Skills to the catalog's content. Skills tagging can be done through automated Skills tagging or Edge Import. For more information, *See Capabilities Preferences - Content Skills Tagging. See Training Capabilities - Content Skills Tagging.*

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
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	Learning - Administration

	organizational unit (OU) and User's OU. This is an administrator permission.	
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

Material Versioning - Resubmit After Versioning Flow Failure

In rare cases, an error can occur during the versioning of a material by an administrator, causing an incomplete version to be created. In this scenario, the administrator is unaware the error occurred and the version is incomplete.

With the March '24 Release, a new fail safe is built into the versioning of a material by an administrator. Now, in the rare instance that an error occurs during the creation of a new version, a message is displayed upon clicking "Save" advising the administrator of the error and directs the administrator to try saving the material again. This fail safe ensures no incomplete version is created.

Closing the message returns to the last page of the versioning process where they can try to save again to resubmit the versioning process. Resubmitting allows the versioning process to restart so it can complete successfully. If retrying the versioning process continues to fail, the administrator can follow up with customer support for troubleshooting.

Implementation

This enhancement is on by default, but the new warning message is only displayed in the rare instance that an error occurs saving the material during versioning.

New "SF-182 Add Approver" Permission

New "SF-182 Add Approver" Permission

Prior to this enhancement, administrators could not restrict users, managers, and approvers from adding additional approvers to the SF-182 approval workflow via the training details page.

With this enhancement, administrators can now activate the add approver functionality with the help of the new "SF-182 Add Approver" security permission and configure the permission with additional constraints. The new permission allows greater control over whether approvers can be included in the SF-182 approval workflow and can be constrained to restrict which approvers can be selected.

How Does this Enhancement Benefit My Organization?

- It allows configuring whether managers, approvers, or employees will see the Add Approver option on the training details page.
- The Add Approver option on the training details page will be hidden or displayed depending on the security configuration.
- Allows greater control over whether approvers can be included in the SF-182 approval workflow.

Considerations

If the security permission is not added, the Add Approver option will not be visible in the training details for the SF-182 requests.

Frequently Asked Questions (FAQs)

Why do I not see Add Approvers when I view the training details page for an SF-182 request?

A new security permission called SF-182 Add Approver must be added to any security role that wants to allow the Add Approvers option to be used.

When I click on + App Approvers when viewing the training details page, why can I select anyone in the organization?

Check the security role where + Add Approvers is added to see what constraints are used for the SF-182 Add Approver security permission. Constraints of the user, user OU, and organizational units can be utilized with the SF-182 Add Approver security permission.

Implementation

This functionality is available for all organizations using the Learning module.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SF-182 Add Approver	Allows users to view and click on the +Add Approver on the SF-182 Training details page. This permission can be constrained by OU, User's OU, and User Self. This is an end user permission.	Learning - Administration

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 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.	Limited Use/Obsolete
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

Security Role

Upon release, the new SF-182 Add Approver permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

New permission SF-182 Add Approver

A new security permission called SF-182 Add Approver can be added to any security role that needs to add approvers through the training details page for an SF-182 request.

If the security permission is not added, the Add Approver link does not appear (this is the default behavior on release.)

The constraints OU, User's OU, and User Self can be added to the SF-182 Add Approver permission to restrict who can be added as an additional approver through the training details page for an SF-182 request.

Without permission

Approval Section	Approver(s)	Response Action	Response Date	Option
Section D 1a	SF Manager, SF Approver4, SF Approver3, SF Approver1, Darren Elkind	Pending	Pending	
Section D 3a	Ravi Gehlot_Admin	N/A	N/A	

With permission

Approval Section	Approver(s)	Response Action	Response Date	Option
Section D 1a	SF Manager, SF Approver4, SF Approver3, Darren Elkind	Pending	Pending	⊕ Add Approver
Section D 3a	Ravi Gehlot_Admin	N/A	N/A	⊕ Add Approver

"One Player" Inline Experience for Standalone Trainings (Open Beta)

"One Player" Inline Experience for Standalone Trainings (Open Beta)

Generally, launching different training types offers different user experiences. Sometimes, it opens a pop-up with the course content; other times, it redirects you to various pages to view the training.

With this enhancement, we are introducing a "one-player" experience that provides a consistent, reliable user experience (UX) when launching a training as a standalone from the transcript. It offers a standardized view to the learners who can complete their training using the same UX across all kinds of content.

The key features of "one-player" functionality are:

- New UI and UX for materials, online courses, videos, and tests.
- Color indicators on transcript statuses when training is completed or past due.
- Consistent breadcrumbs.
- A new modal supporting continuous learning once training is completed.

How Does this Enhancement Benefit My Organization?

- Consistent playback experience to make completing training intuitive.
- Modern UI to increase learner engagement and product sentiment.

Considerations

Any non-supported training types will be launched in the existing experience.

Implementation

This functionality is only available as Open Beta in Stage portals for all organizations. The functionality is automatically disabled and requires self-activation. To activate, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **One Player Experience** section, click **ACTIVATE**. One Player can be deactivated if needed using the same feature activation preference. We would love your feedback on the **'One Player' Beta Community** in the Cornerstone Success Center.

Permissions

The following existing permissions apply to this functionality:

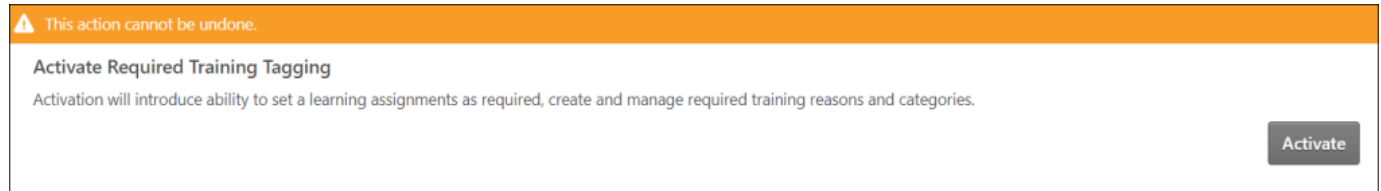| PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Learning, Connect and Extended Enterprise.	Learning - Administration

"One Player" Inline Experience supported training

With this Milestone, 'One Player' will support materials, online courses, videos, and tests. If training is launched from their Transcript, Learning Details page, or Learner Home, they will be directed to 'One Player.'

Materials

- 'One Player' will display inline PDFs, jpegs, gifs, and supported URLs.
- If a URL cannot be launched inline due to site restrictions (e.g., domains that block embedding), it will be launched in a new tab.
- Materials that require a download (docx, xslx) will be downloaded instead of launched in 'One Player.

Videos

- All supported video formats will be launched in 'One Player' (mpg, mpeg, m4v, mp4, YouTube.)
- 'One Player' will support the video auto-complete functionality if enabled.

Online Courses

- SCORM and AICC courses will be launched in 'One Player.'
- If a learner wants the content launched in a full window, we have text at the bottom of the player that will launch in a new tab.
- For courses that rely on closing the window to trigger a completion, we have an 'Exit Course' button that will simulate the course window closing and terminate the session. This should mark the course as completed if all completion criteria are met.
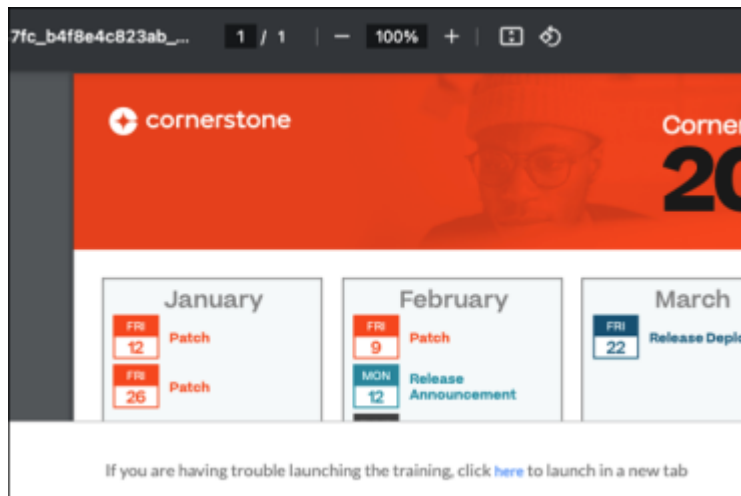
Tests

- Updated UI for task-taking experience.
- All existing features are compatible.

Continue Learning Modal

- Displays after a training is completed.
- The training displayed here is already on the learner's transcript.
- It cannot be turned off at this point.

Continue Learning   ×

Transcript   ‹ ›

Other Learning Activity
2024 CSX Release Calendar PDF
In Progress

Curriculum
03/02 second curri volov case 1 resolved
Approved

Curriculum
13/03 volvo curri1
Approved

Curriculum
03/02 curri volov case 1 resolved version4
Approved

• · ·

View Transcript

Reporting Fields - Learning

Reporting Fields - Learning

The following enhancements have been made to Learning Reporting:

- New Reporting 2.0 Report Type: Provider and Instructor Report
- Additional Filters for Certification Approval History Report
- Null Value Support for Training Custom Fields
- Required Training Reporting

New Reporting 2.0 Report Type: Provider and Instructor Report

With this enhancement, we have added a new report type called Provider and Instructor. This report includes the following fields:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Instructor Name	Full name of the instructor (Last Name, First Name)	Text
Instructor GUID	Unique system-generated ID of instructor. This ID is generated for both internal and external instructors.	Text (GUID)
Instructor Email	Email address of the instructor	Text (GUID)
Location	Location of the instructor	Text
Phone	Phone of the instructor	Text
Instructor Active for Vendor	Displays whether the instructor is active	Text (Y/N)
Instructor First Name	First name of the instructor	Text
Instructor Last Name	Last name of the instructor	Text
Training Provider	Name of the provider	Text
Training provider active	Displays whether the provider is active	Text (Y/N)
Provider Contact	Contact name of the training provider.	Text
Provider Phone	Contact phone number of the training provider	Text
Provider City	City of the provider	Text
Provider Location Address 1	Address 1 information for the provider	Text
Provider Location Address 2	Address 2 information for the provider	Text
Provider Mailstop	Mailstop information for the provider.	Text
Provider State	State for the provider.	Text
Provider Zip	Zip code for the provider.	Text

Additional Filters for Certification Approval History Report

Additional filtering options simplify the configuration of the Certification Approval History report type, allowing users to selectively capture specific certification approval history records.

Users can now filter by:

- Request Date
- Request Type
- Decision
- Decision Date
- Organizational Unit
- Certification Title

Null Value Support for Training Custom Fields

Previously, when a Training custom field was configured to be editable on the Transcript and its value was a blank value (null) on the Transcript, Reporting 2.0 erroneously retrieved the value set on the learning object (LO) in the Course Catalog instead of returning the null value, resulting in misleading reports.

With this enhancement, when a Training custom field is configured to be editable on the Transcript and its value is a blank value (null) on the Transcript, Reporting 2.0 correctly returns the Transcript's null value for the custom field instead of defaulting to the value from the Course Catalog.

Required Training Reporting

When creating reports that include assignment information (Assignment, Transcript, Curriculum Transcript, Transcript & Performance report types), the following new fields are available:

FIELD NAME	SECTION & SUB-SECTION	FIELD TYPE (NUMERIC, TEXT, DATE)	VALUE (IF APPLICABLE)
Assignment Is Set As Required?	Assignment	Text	Text (Y/N)
Assignment Requirement	Assignment	Text	Text
Assignment Requirement ID	Assignment	Text	Text
Assignment Category	Assignment	Text	Text
Assignment Category ID	Assignment	Text	Text
Requirement Assign Date	Required Training	Date	Date
Requirement Category	Required Training	Text	Text
Requirement Category ID	Required Training	Text	Text
Requirement Fulfilled	Required Training	Text	Text (Y/N)
Requirement ID	Required Training	Text	Text

FIELD NAME	SECTION & SUB-SECTION	FIELD TYPE (NUMERIC, TEXT, DATE)	VALUE (IF APPLICABLE)
Requirement Title	Required Training	Revert is allowed	Text

Implementation

This functionality is automatically enabled for all organizations using the Reporting 2.0 module.

Permissions

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

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

Reporting 2.0 - Null Value Support for Training Custom Fields

Previously, when a Training custom field was configured to be editable on the Transcript and its value was a blank value (null) on the Transcript, Reporting 2.0 erroneously retrieved the value set on the learning object (LO) in the Course Catalog instead of returning the null value, resulting in misleading reports.

With this enhancement, when a Training custom field is configured to be editable on the Transcript and its value is a blank value (null) on the Transcript, Reporting 2.0 correctly returns the Transcript's null value for the custom field instead of defaulting to the value from the Course Catalog.

How Does this Enhancement Benefit My Organization?

This enhancement enables organizations to accurately report on edits made within a user's Transcript.

Use Case

1. A Training custom field, Credit Hours, is configured to be editable on the Transcript.
2. An administrator sets this field to 15 for an online course, Project Management 101, in the Course Catalog.
3. A manager edits this value for the Project Management 101 course on a user's transcript and sets it to a blank or null value.
4. An administrator creates a report in Reporting 2.0 and includes the Credit Hours custom field from the Training section (Training > Custom Fields > Credit Hours) and from the Transcript section (Transcript > Custom Fields > Credit Hours).

Results prior to this enhancement:

TRAINING CUSTOM FIELD	TRANSCRIPT CUSTOM FIELD
15	15 (default value from Course Catalog)

Results after this enhancement:

TRAINING CUSTOM FIELD	TRANSCRIPT CUSTOM FIELD
15	Blank/Null (actual value from Transcript)

Required Training Tagging (Early Adopter)

Required Training Tagging (Early Adopter)

Prior to this enhancement, it was difficult to tell which training was required when leveraging groups, training purposes, custom fields, or learning assignment data. Therefore, customers needed the ability to track the training that is required.

With this enhancement, Required Training Tagging allows organizations to monitor required training assignments better. Administrators can tag training as needed while assigning it to learners and tie it to a requirement to ensure better visibility and tracking. The purpose is to recommend a learner to take a training deemed "required." The requirements descriptions are client-specific and give learners and managers a better understanding of why the training is assigned.

The Required Training Tagging feature offers the following functionalities:

- Ability to create and manage a client-specific "requirements" catalog.
- Ability to create learning assignments and tie them to the new requirements.
- Ability to edit existing learning assignments and tie requirements to them.
- Enhanced visibility of required training on the Learner Home and Transcript.
- Ability to integrate a dedicated widget on the welcome page.
- New fields in reporting and new reporting logic for required training.
- A new set of permissions that drive the new functionality.

Important: Versioning scenarios are not fully supported at the start of user acceptance testing (UAT). Customers who use versioning should not self-activate Required Training Tagging until versioning scenarios are fully supported. This is targeted, but not confirmed, for UAT 3. Please watch for further updates regarding support for versioning scenarios.

Activating Required Training Tagging

As the Required Training Tagging is released as an Early Adopter with the March 2024 release, it is not activated by default. We expect this feature to be generally adopted by March 2025.

The Required Training Tagging requires activation via Feature Activation Preferences. To do this, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Activate Required Training Tagging** section, click **ACTIVATE**. Once activated, this preference cannot be deactivated.

Note: *It is advised to test this first in stage or pilot before activating this in the production environment, as this action cannot be undone. If you have custom inbound data feeds bringing in transcript registration and completions, please connect with your account team, as these feeds need to be updated on the Cornerstone side.*

The Required Training Tagging provides additional features as part of the Learning product suite. Activating the Required Training Tagging brings in a new type of administrative justification called "Requirement." Requirements will be used in the Learning Assignment System (LAT) and visible on the user's transcript and reporting.

Activating the Required Training Tagging introduces the following new features under the Learning Preferences page:

- Activate Requirements for Required Training Assignments
- Manage Training Requirements

How Does this Enhancement Benefit My Organization?

- It gives better visibility to all involved personas, from learners and managers to compliance officers and training administrators.
- The administrators can track required training assignments more efficiently.
- Administrators can tag which assignments are required and which requirement(s) they cover.
- Provides better insights into which trainings are required and why. Managers can now better help team members prioritize.
- It gives better visibility into assigned required training on their transcript. Knowing why training has been assigned helps to set priorities.

Considerations

- Required Training Tagging is the first block of our larger Required Training Project. More information on this project can be found in the Client Success Center, **Cornerstone Beta Community, Learning**.
- Required Training Tagging does not replace the availability type "Required," which is not used for assignments.

- Required Training Tagging only impacts the learner's transcript via the Learning Assignment Tool; it means the training is assigned as needed.
- We aim to finish the full Required Training Project by March 2025, after which the Required Training Tagging will be on by default for all clients.

Implementation

The availability of this functionality is controlled by a feature activation setting, which is disabled by default. It can be self-activated via Feature Activation Preferences.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Activate Required Training Requirements Preferences	Grants ability to activate Required Training Requirements by organizational unit. This permission can be constrained by OU and User. When activated, these reasons are available to administrators when assigning training from Learning Assignment Tool (LAT).	Learning - Administration
Assignment Tool - Edit Required Training TAG and reason	Grants the administrator the ability to edit the Required Training reason and TAG of dynamic learning assignments via the Assignment Summary page for the assignment. This permission can be constrained by OU and User's OU.	Learning - Administration
Required Training Requirements Manage	Grants ability to add and edit/update Requirements, which can then be made to appear or not appear at the organizational unit level to administrators when setting up Required Training Learning Assignments. This is an administrator permission.	Learning - Administration
Remove Required Training	Grants ability to remove required trainings if user has another training removal permission. This permission can be constrained by OU, User's OU, User's Corporation, User Self and Subordinates, User's Self, User's Direct Subordinates, and User. This is an administrator permission.	Learning

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

Security Role

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

Getting Started with Required Training Tagging

As the Required Training Tagging is released as an Early Adopter with the March '24 release, it is not activated by default. We expect this feature to be generally adopted by March 2025.

The Required Training Tagging requires activation via Feature Activation Preferences. To do this, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Activate Required Training Tagging** section, click **ACTIVATE**.

⚠ This action cannot be undone.

Activate Required Training Tagging

Activation will introduce ability to set a learning assignments as required, create and manage required training reasons and categories.

Activate

Note: *It is advised to test this first in stage or pilot before activating this in the production environment, as this action cannot be undone. If you have custom inbound data feeds bringing in transcript registration and completions, please connect with your account team, as these feeds need to be updated on the Cornerstone side.*

The Required Training Tagging provides additional features as part of the Learning product suite. Activating the Required Training Tagging brings in a new type of administrative justification called "Requirement." Requirements will be used in the Learning Assignment System (LAT) and visible on the user's transcript and reporting.

Activating the Required Training Tagging introduces the following new features under the Learning Preferences page:

- Activate Requirements for Required Training Assignments
- Manage Training Requirements

Administrative Action Justifications

Activate Reasons for Session Cancellation 📌
Activate session cancellation reasons, by Division

Activate Reasons for Training Exemption 📌
Configure and activate exempt training reasons, by Division

Activate Reasons for Training Removal 📌
Manage the active status of the training removal reasons, by Division

Activate Reasons for Withdrawing Users from Sessions 📌
Activate session withdrawal reasons, by Division

Activate Requirements for Required Training Assignments 📌
Activate Requirements by Division

Configure Training Reasons 📌
Configure the reasons that are available in Training Exemptions, Training Removals, Session Withdrawals, Session Cancellations

Manage Training Requirements 📌
Build your training requirement library

The starting point is to build your "Requirements" catalog. Your business case will dictate requirements. You can create categories, which makes it easier to organize, manage, and report on requirements. We have heard from several customers that requirements could represent a particular task (for example, working with a specific machine, repairing a device, manning a station on the production line) or a higher level role, what a person does, where he works (for example, first aid, warehouse 51, production line 2, etc.). A category could represent a location or a business area; it is up to you to determine their best use. The objective is constantly identifying and monitoring.

It is recommended to have the categories in place before creating large numbers of requirements. An admin can always move a requirement from one category to another if needed. There is only 1 level of categories; sub-categories are not supported.

What are Requirements and what do they represent

- A requirement is typically something you want to track to understand if the learner has fulfilled the requirement. The requirement identifies training assigned for a particular purpose, job, or activity. For example, being qualified to sell insurance, perform first aid, or work on a specific manufacturing line.
- The requirement will be visible on the learner's transcript. The Learner will have direct links to a filtered view of the transcript from Learner Home, and a widget will be available for the welcome page. The learner can filter on required training in general and one or more requirements via additional filter options on his transcript.
- These same filters are available to anyone looking at the learner's transcript. All of this will also be available in Reporting 2.0, allowing administrators to easily track assigned training by requirement easily and to see which assignments cover which requirement.

Manage Requirements and Activate Requirements for use in the Learning Assignment Tool

Activating the Required Training Tagging introduces the following new features under the Learning Preferences page:

- Activate Requirements for Required Training Assignments
- Manage Training Requirements

The Manage Training Requirements allows administrators to:

- Create new requirements and categories
- Create a requirement and tie it to an existing category
- Create a requirement and create a new category in the flow
- Create a new category via the manage categories page
- Update existing requirements and categories
- Edit a requirement and provide a localization
- Deactivate or re-active requirements
- Delete not-in-use requirements
- Review the modification history

Creating and managing a requirement

- To create a requirement, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > MANAGE TRAINING REQUIREMENTS > CREATE REQUIREMENT.
- In the Create requirement dialog, enter Requirement category and Training requirement description. You can also create new category by going to MANAGE TRAINING REQUIREMENTS > MANAGE REQUIREMENT CATEGORIES > CREATE CATEGORY.
- Turning on the **Add Translation** toggle translates the Create Requirement texts with available translations in the portal. Turning the toggle off results in your translations getting lost.
- Click **SAVE**.
- Search for the newly created or existing requirements via the Search option.

Activating a requirement

The Activate Requirements for Required Training Assignments allows administrators to activate training requirements by OU.

- To activate a requirement, select the checkbox under the Active column for the corresponding requirement. Deactivate a requirement by clearing the box. Active requirements appear in the select requirement flyout when creating or editing a learning assignment in the Learning Assignment Tool.
- When using the search, enter the keyword you are looking for. Activate or deactivate the requirements you want to add or remove from the availability.
- After selecting, click **Show All** to see all the active and inactive requirements.
- Click **SAVE** to save the configuration.

Use of Requirements in Learning Assignment Tool

With the Required Training Tagging activated, an additional option within the learning assignment setup is available to tag the assignment as a required training.

Assignment Type

Which Assignment Type would you like to create?

◉ Standard (process one-time only)

○ Dynamic (process continuously or periodically)

☐ Required training assignment

Creating a required training assignment

Go to ADMIN > TOOLS > LEARNING > LEARNING ASSIGNMENT TOOL > CREATE ASSIGNMENT > SETUP. In the Setup section, under Assignment Type, select **Required training assignment**. Tagging the assignment as a required training assignment makes the selection of a requirement for that assignment mandatory to continue with the creation of the assignment.

Assignment Type

Which Assignment Type would you like to create?

◉ Standard (process one-time only)

○ Dynamic (process continuously or periodically)

☑ Required training assignment

Select Requirements

Click **SELECT REQUIREMENTS**. It opens the Select Requirements modal. The administrator can search for the requirement via a keyword in the **Search for a requirement or category**. The administrator can search for the requirement via a keyword in the description or category. Select the requirement you want to tie to this assignment; only one requirement can be tied to an assignment.

Assign New Occurrence

In the Users section, if the **Enable Assign New Occurrence** toggle is turned off, only users who do not have the training on their transcript will get the training and the requirement.

if the **Enable Assign New Occurrence** toggle turned on, but **Maintain Progress** toggle is turned off, the users get a new occurrence with the requirement.

- The previous registration number had requirement or not and was completed. The new registration number has a requirement from the new assignment.

- The previous registration number had a requirement and was not completed. The new registration number has the requirement from the previous registration number and the requirement from the new assignment.

if the **Enable Assign New Occurrence** and the **Maintain Progress** toggle turned on, the users get a new occurrence if the training (same version) is not yet on their transcript.

- The previous registration number had a requirement and was completed or not completed. Current registration number requirements are appended with the requirement of the new assignment.

Initial User List

After configuring **Assign New Occurence**, click **GENERATE INITIAL USER LIST**. The user card information displays the current registration number along with the requirement assigned by the previous assignment.

In the Confirm section, expand the Setup tile by clicking the drop-down arrow on the right side of the tile to see the selected requirement and the requirement category.

Managing Existing Learning Assignments

After saving the LAT, go back to the Manage Learning Assignments page. Filter the list of assignments by requirement using the **SELECT REQUIREMENT** filter. The assignments set as required are marked with a **Required** indicator.

Manage Learning Assignments

Create Assignment | Options ▼

Search by Assignment Title or Assignment ID   🔍 ▼ Filter (1)   Sort by Created Date (Newest-Oldest) ▼

Training Title   Created By   Course Code

Enter Training Title   🔍   Enter First Name and/or Last Name 🔍   Enter Course Code 🔍

Created Date

Custom ▼   From   📅   To   📅

Type *   Status *   Recurrence *   Required Reason

2 Selected ▼   8 Selected ▼   2 Selected ▼   Select Requirements

User Criteria   Source *

Select Users   All Users   Created with Learning Assignment Tool ▼

Reset Filters   Apply Filters

Cleanroom training assignment
Assignment ID : 98752   Type : Standard   Status : Processed   Created Date : 1/16/2024 1:08 PM   Created By : Eric Colville
Source : Created with Learning Assignment Tool

Required   User Criteria   7 Training ▼

LAT_20240116113601
Assignment ID : 98751   Type : Dynamic   Status : Active   Recurrence : On   Created Date : 1/16/2024 12:31 PM   Created By : role_user res_ld2_1
Source : Created with Learning Assignment Tool
description

User Criteria   1 Training ▼

In the submitted learning assignment, click **VIEW SUMMARY** from the drop-down to open the assignment summary. On the Assignment Summary page, the Transcript History section indicates the current and past assignments.

ecbx

User A ecbx

Occurrence # 2
Assigned By : Learning Assignment Tool (98782)
Associated Date : 1/16/2024 1:06 PM
Status : Completed (Completed)
Completed Date : 1/2/2024 9:05 AM
Required Reason : Working in Cleanroom environment

Occurrence # 2
Assigned By : Learning Assignment Tool (98782)
Associated Date : 1/16/2024 1:06 PM
Status : Completed (Completed)
Completed Date : 1/2/2024 9:05 AM

Occurrence # 2
Assigned By : Learning Assignment Tool (98444)
Associated Date : 1/9/2024 5:05 PM
Status : Completed (Completed)
Completed Date : 1/2/2024 9:05 AM

Occurrence # 1
Assigned By : Learning Assignment Tool (97476)
Assigned Date : 12/21/2023 10:09 AM
Status : Completed (Completed)
Completed Date : 12/15/2023 9:30 AM
Required Reason : Agricultural

Editing Existing Dynamic Learning Assignments

The "Required" tag and requirement can be updated on existing dynamic learning assignments. Editing the "Required" tag and requirement uses the same logic as updating the due date settings of an existing dynamic assignment. The update impacts:

- Users who join the dynamic assignment from that moment on.
- Users impacted by versioning of the training assigned by the dynamic assignment.

Setup

1
Training

Training Selection

OC_Service_20240116220245-0469
Provider : qa02_lms_signoff **Current Version :** 1.0 **Training Hours :** N/A **Price :** $0.00 **Course Code :** N/A
description EN

Required training assignment
Yes

Required training category
Industries In Business

Selected required training requirement
Working in Cleanroom environment

Comment
N/A

Edit

All changes in "is required" and "requirement" are tracked in the Modification History section. Please note that the modification displays a maximum of 20 entries, the submission, and the last 19 changes.

Transcript Behavior

Express Class

When an Express Class is used, the Requirements sitting on the previous registration number are carried over to the new Express Class registration number, independent of the status of the previous registration number.

Request Training

When training is self-requested, it does not influence the completion of the requirements sitting on the previous completed registration number of the training.

Direct Assign

When the manager assigns training, it does not influence the completion of the requirements sitting on the previous completed registration number of the training.

Assign Session with Requirement

If a Session is assigned via LAT with a requirement, this requirement is shown. If an Event is assigned with a requirement and a session is selected by the learner, or the learner is booked on a Session via any other means, the requirement of the Event is shown. Completing a Session completes the corresponding registration number of the Event and sets the Requirement on the Event as completed.

Training Equivalence

- If completion by training equivalence is applied, the requirement of the originally assigned LO is set to completed.
- If completion by language equivalence is applied, the requirement of the originally assigned LO is set to completed.
- If version equivalence is applied, the requirement on the new version is set to completed.

Remove Training from Transcript

An administrator cannot remove assigned required training without specific permission to remove "Required assigned" training from the transcript. Removal via transcript or removal tool of assigned required training is not recommended; the removal is performed via the LAT.

Unremoved Training

Un-removing the training ties the registration number to the requirements of the set as "Required" Dynamic assignments for which:

- The learner receives the training by a new assignment
- The learner again becomes a member (re-entering)
- The learner has received the training and is still a member of

Versioning

When versioning training, the following rules apply:

- All users with the previous version on their transcript or users by OU:
  - Requirements of previous registration number and dynamic assignments the user is part of are carried forward.
- Dynamically assigned:
  - Requirements of all selected dynamic assignments are carried forward.

- In some cases, you can select some and not all dynamic assignments, and then only the requirements of the selected dynamic assignments are carried forward.

Required Training Visibility on the Transcript, Learner Home, and Welcome page

The Required Training Tagging feature enhances Learner Home, Welcome page, and learner's Transcript.

Learner Home

Transcript view section

The active transcript shows the number of non-completed required trainings. Clicking on the number will redirect the learner to its pre-filtered transcript. The number is not displayed if nothing is under the Required bucket, and the usual Past due, Due soon, and Assigned/No Due Date is shown.

Compliance section

Required training is tagged, and requirements on the registration number are shown.
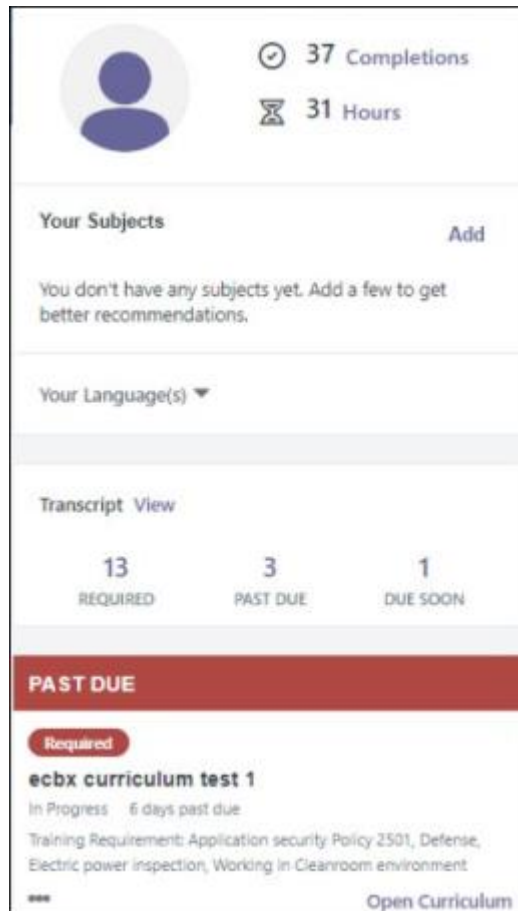
Welcome Page

A new widget is available to be configured on the welcome page. This widget mimics the transcript block of the Learner Home and displays the numbers for the following:

- Required (if not null)
- Past Due
- Due Soon
- Assigned / No Due Date (if no required training is shown)

Learner's Transcript

On the learner's Transcript, sort the training status by using the following filters:

- Active
- Required
- Past due
- Due soon
- Assigned/No Due Date

The Filter by Training Requirement lets you filter one or more requirements using categories.

The Training assigned as required is tagged as "Required" on the learner's transcript. The color of the tag is dependent on the due date status which are:

- Red - Past due
- Orange - Due Soon
- Grey - Assigned/No Due Date

The requirements associated with trainings (overlapping assignments) are all shown.

The requirements on the learner's transcript are also visible on the Learning details page for the learner.

Requirements are displayed on the following transcript details:

- Current registration
- Past registrations

- Transcript modification history

Training Type: Curriculum
Provider: ABA
Version: 5.0
Training Hours: Information not supplied by provider
Description:
Status: In Progress
Training Purpose:
Due Date: 1/15/2024
Expiration Date:
Required: Agricultural, Defense, Electric power inspection, Monitoring and Scanning Policy
TAPI RadioField: TAPI-1

Transcript History

Registered by Learning Assignment Tool (98245) on 1/9/2024 5:22:05 PM Comments: Upgrade Register
Training Marked Required by Learning Assignment Tool (98232) On 1/9/2024 5:22:03 PM Requirement: Monitoring and Scanning Policy
Training Marked Required by Learning Assignment Tool (98233) On 1/9/2024 5:22:03 PM Requirement: Agricultural
Training Marked Required by Learning Assignment Tool (98236) On 1/9/2024 5:22:03 PM Requirement: Electric power inspection
Training Marked Required by Learning Assignment Tool (98245) On 1/9/2024 5:22:03 PM Requirement: Defense

Increasing Monitoring Capabilities for Required Training through new Reporting Attributes and a Specific Report

The Required Training Tagging feature brings new reporting attributes. You can include the required training information in the Transcript report. To do that, go to the learner's Transcript page and click **RUN TRAINING RECORD REPORT** or **RUN TRANSCRIPT REPORT** option from the drop-down Action menu.
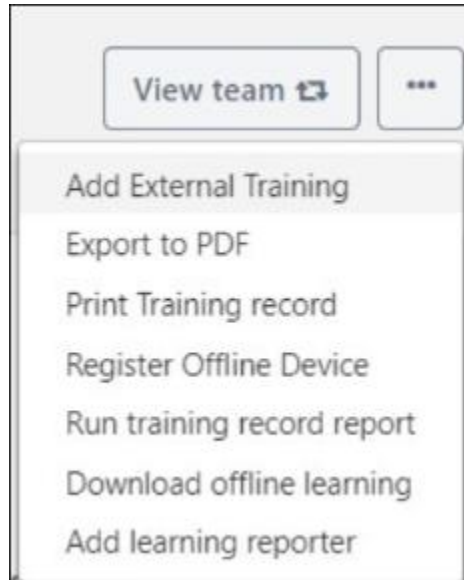
In the Transcript Report page, select **Include Required Training Information** and click **RUN REPORT**. The generated report displays new columns, **Required** and **Requirements**. The Required column displays if training is required or not. The Requirements column displays what requirements are covered by the assigned training.

Transcript Report | Material overlapping assignment 2 with requirement 11

Name: userA ecbx
Division: 01/23 Division - test
Date Criteria Type: Date training is added to users' transcript
Start Date:
End Date:
Training Type: Cohort, Curriculum, Event, External Training, Library, Material, Online Class, Posting, Quick Course, Session, Test, Online Content
Training Title:
Subject(s):
Archived Training Include: No
Include Required Training Information: Yes
Completed Training Only: No
Report Generated By: userA ecbx
Report Date: 11/30/2023

TITLE	TYPE	REGISTERED	START DATE	END DATE	DUE DATE	SCORE	STATUS	COMPLETION DATE	REQUIRED	REQUIREMENTS
08021701Session08021701Session08021123 45	Session	11/30/2023	08/05/2027	08/05/2027	N/A		Withdrawn	N/A	Yes	PK Reason 3
08021701Session08021701Session08021123 45	Event	N/A	N/A	N/A	N/A		Approved	N/A	Yes	PK Reason 11
ecba test 5 v7	Books	11/29/2023	N/A	N/A	N/A		Registered	N/A	Yes	PK Reason 15
ecba271123	Curriculum	11/29/2023	N/A	N/A	N/A		In Progress	N/A	No	N/A
ecba test 4 (append) v3	Books	11/29/2023	N/A	N/A	N/A		Registered	N/A	No	N/A
ecba test 2 v2	Books	11/29/2023	N/A	N/A	N/A		Registered	N/A	No	N/A
LMS-122538 19082023 TC6 c1v1	Curriculum	11/27/2023	N/A	N/A	N/A		In Progress	N/A	No	N/A
Test0619_Test	Event	N/A	N/A	N/A	N/A		Approved	N/A	Yes	PK Reason 11
Defect language 2	Event	N/A	N/A	N/A	N/A		Approved	N/A	No	N/A
ecba test 4	Books	11/15/2023	N/A	N/A	N/A		Registered	N/A	No	N/A
ecba test 4 (append)	Books	11/15/2023	N/A	N/A	N/A		Registered	N/A	No	N/A
ecba test 3 (replace)	Books	11/14/2023	N/A	N/A	N/A		Registered	N/A	Yes	PK Reason 6, PK Reason 11

Requirements in Reporting 2.0

The Required Training Tagging introduces five additional fields for Assignment in the Data panel in Reporting 2.0:

- Assignment Is Set As Required?
- Assignment Requirement
- Assignment Requirement ID
- Assignment Category
- Assignment Category ID

Assignment Is Set As Required?	Assignment Requirement	Assignment Requirement ID	Assignment Category	Assignment Category ID	Assignment ID
Yes	Has impact on end of year bonus	20	Financial impacting	4	13991
Yes	Has impact on end of year bonus	20	Financial impacting	4	14073

If you select requirement data in the report, the transcript report becomes a required training transcript report.

New Reporting Fields

FIELD NAME	SECTION & SUB-SECTION	FIELD TYPE (NUMERIC, TEXT, DATE)	VALUE (IF APPLICABLE)
Assignment Is Set As Required?	Assignment	Text	Text (Y/N)
Assignment Requirement	Assignment	Text	Text
Assignment Requirement ID	Assignment	Text	Text
Assignment Category	Assignment	Text	Text
Assignment Category ID	Assignment	Text	Text
Requirement Assign Date	Required Training	Date	Date
Requirement Category	Required Training	Text	Text
Requirement Category ID	Required Training	Text	Text
Requirement Fulfilled	Required Training	Text	Text (Y/N)
Requirement ID	Required Training	Text	Text
Requirement Title	Required Training	Revert is allowed	Text

Sorting Options in Learning Assignment Tool Search Training Modal

Prior to this enhancement, administrators had no option to sort search results in the Select Training modal within the Create Learning Assignment workflow.

With this enhancement, administrators using the Learning Assignment Tool with Enhanced Search enabled can sort search results by relevance or title with the help of a new **Sort By** dropdown in the Select Training modal. The default state of the dropdown is **By Relevance**, but the administrators can also sort the search results alphabetically by selecting the **By Title** option.

To access the **Sort By** dropdown, 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 modal. Under **Search** section, perform a search. The **Sort By** is shown after completing a search.

How Does this Enhancement Benefit My Organization?

This administrative search enhancement helps administrators find training by allowing them to view search results using relevancy or alphabetical sorting.

Implementation

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

The **Enable Enhanced Search on Select Training** setting must be toggled on in Assignment Tool Preferences to see the sorting options.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Assignment Tool - Restrict to Users' LO Availability	This permission does not grant ability to any specific functionality and can only be constrained by Users' LO Availability. If this permission is constrained, then the user creating the Learning Assignment can only select and assign training that is within the users own availability. This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This is an administrator permission.	Learning - Administration
Assignment Tool - Standard and Dynamic - Recurrence	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. Also grants ability to enable/disable Recurrence when creating a Dynamic Learning Assignment. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Assignment Tool - Standard and Dynamic	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Assignment Tool - Standard	Grants ability to create Standard (one-time) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view	Learning - Administration

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

Stop Auto-Populating Search Results in Administrative Search - General Availability

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 that is enabled by default. 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."
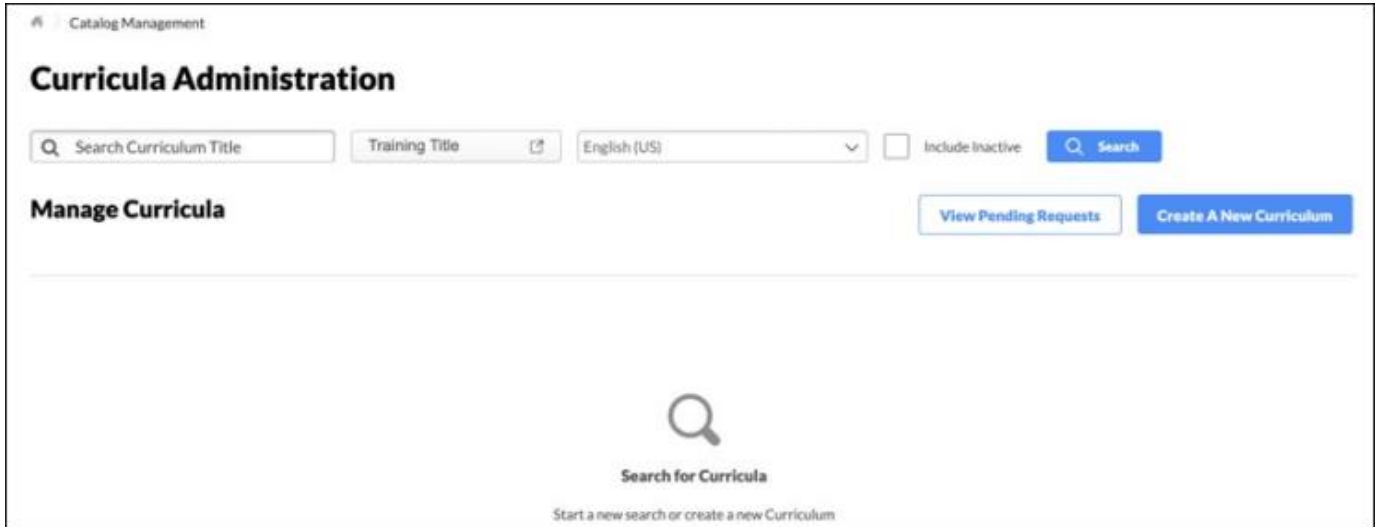
The list of administrative pages includes the following:

- Manage Sessions
- Curriculum Administration
- Material Administration
- Test Administration
- Question Administration
- Certification Administration
- Video Administration

A separate preference is available for the Manage Learning Assignments page within the Learning Assignment Tool. The administrators can enable or disable the functionality separately from the other pages. This preference is disabled by default in production environments unless that portal already enabled this functionality before the March release. No changes apply to the enabled or disabled status of this preference.
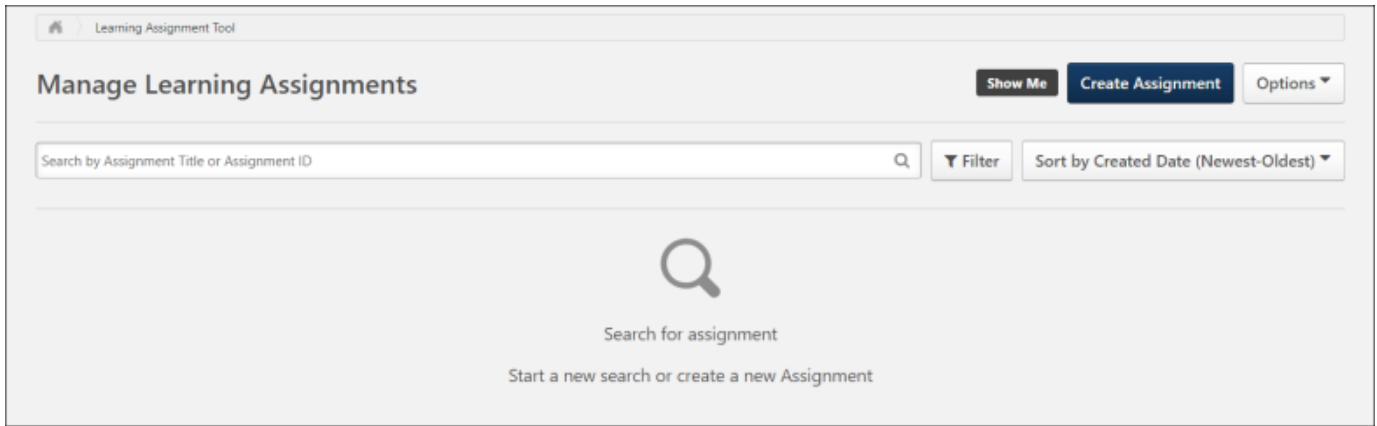
To enable the preference for Manage Learning Assignments page, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Auto Populating Results in Administrative Search - Learning Assignment Tool - Manage Assignments** section, click **ACTIVATE**.

How Does this Enhancement Benefit My Organization?

- The administrators utilizing various search pages can complete searches faster, reducing waiting time and enhancing productivity.
- This administrative search enhancement helps to improve administrator efficiency by not requiring administrators to wait for search results to load before performing a search.
- Administrators with large catalogs may notice that the page loads faster and allows them to enter a search in less time than before.

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 enhance administrators' efficiency.

Can I change this preference?

Yes. Administrators can manage this preference through the Feature Activation Page.

Will any other functionality be affected by this enhancement?

No. No other changes will be made as a part of this enhancement.

Why does the Manager Assignments page receive its own preference, and the preference not being changed?

The first version of this functionality was released as Early Adopter during the November 2023 release. Customer feedback from this release told us that customers understood and appreciated the change in most administrative pages. However, the Manage Assignments page was where customer feedback told us this change was not helpful and hurt their experience. As part of the March 2024 release, we will keep the preference available to customers who wish to use it but separately so customers can manage their portal in a way that suits their specific needs.

Implementation

This functionality is available for all organizations using the Learning module. No activation is required for the various administrative pages in Stage or Production portals except for the Manage Learning Assignments page, which requires activation separately through Feature Activation 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

Version Equivalence Alignment - Materials and Online Course Feature (Early Adopter)

Version Equivalence Alignment - Materials and Online Course Feature (Early Adopter)

Prior to this enhancement, the version equivalence did not always respect the basic business logic of applying version equivalence with the previous version. It did not always respect the intention of the versioning when users had skipped a version.

With this enhancement, users who have completed the previous version, have a version equivalence received for the previous version, or should be entitled to have received one can get a version equivalence status for the newly created version. This feature enables the enhanced version equivalence flow for online courses and materials always to respect the basic business logic of applying version equivalence with the previous version.

The definition of the previous version is the version that is before the newly created version, regardless of the versioning type (append or replace). Example: if version 4 is version equivalent, it is always with the previous version, in this case, version 3.

This workflow ensures the version equivalence chain is respected. For example, if version 2 is version equivalent to version 1, and version 3 is version equivalent to version 2, then learners who have completed version 1 and receive version 3 get version equivalence.

If, at some point, the version equivalence chain is interrupted, then retraining is required. Example: A learner has completed version 1; version 2 is version equivalent to version 1. Version 3 requires retraining; version 4 is equivalent to version 3. If the learner gets version 4 pushed, the learner will be registered for version 4.

As Version Equivalence Alignment is released as an Early Adopter with the March '24 release, it is not activated by default. To activate it, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Activate Version Equivalence Alignment - Materials And Online Course** section, click **ACTIVATE**. Once activated, this preference cannot be deactivated. The updated version equivalence logic is targeted to be automatically enabled in all portals with the July '24 Release.

How Does this Enhancement Benefit My Organization?

Version equivalence respects the intention of the versioning, even when users skip a version.

Implementation

The availability of this functionality is controlled by a feature activation setting, which is disabled by default. It can be self-activated via Feature Activation 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

Version Equivalence Alignment Use Cases

Use Case 1

- Create a Material Version 1 (M1V1).
- Assign it to the Users (U1 and U2) and complete M1V1 as a Standalone.
- Reversion the M1V1 to M1V2.
  - Version Preference - Replace
  - Effective Date - Immediately
  - Version - All versions
  - Status - Not Started, In Progress, Completed
  - Assign To - Users with Previous Version(s) on Transcript
  - Version Equivalency - Require Retraining (Deselect the users)
- Reversion the M1V2 to M1V3.
  - Version Preference - Replace
  - Effective Date - Immediately
  - Version - All versions
  - Status - Not Started, In Progress, Completed
  - Assign To - Users with Previous Version(s) on Transcript
- Version Equivalency - Versions Equivalent.
- Select U1 and U2 at the time of Reversion.

Before the enhancement: Both U1 and U2 have M1V3 Equivalent Training Completed with M1V1.

After the enhancement: Both U1 and U2 have M1V3 in a registered status.

Use Case 2

- Create a Material Version 1 (M1V1).
- Assign it to the Users (U1 and U2) and complete M1V1 as a Standalone.
- Reversion the M1V1 to M1V2.
  - Version Preference - Replace
  - Effective Date - Immediately
  - Version - 1.0
  - Status - Not Started, In Progress, Completed
  - Assign To - Users with Previous Version(s) on Transcript
  - Version Equivalency - Versions Equivalent
- Select the user U2 at the time of Reversion
- Reversion the M1V2 to M1V3
  - Version Preference - Replace
  - Effective Date - Immediately
  - Version - 1.0
  - Status - Not Started, In Progress, Completed
  - Assign To - Users with Previous Version(s) on Transcript
- Version Equivalency - Versions Equivalent
- Select U2 at the time of Reversion.

Before the enhancement: U2 has M1V3 in a version equivalent status.

After the enhancement: U2 has M1V3 in a version equivalent status. No change on current behavior.

Learning - Content

Bulk Publish Online Courses From Content Uploader

Bulk Publish Online Courses From Content Uploader

Previously, the administrators had to upload zip files with multiple courses inside the Content Uploader and go to the catalog, course by course, to publish them individually.

With the deprecation of Course Publisher in July '24, Cornerstone is introducing the Bulk Publish functionality of Course Publisher into Content Uploader. The Bulk Publish functionality allows administrators to review and publish all or selected publication courses in one click after uploading them in Content Uploader.

The Bulk Publish functionality comes with the following features:

- Ability to Publish in bulk courses from the same Publication.
- Indicator of the number of courses in a Publication and the selected Provider.
- A new page with a list of courses in a Publication that admins can view and Publish.
- Search and Filtering capabilities were added to the upload History page.

How Does this Enhancement Benefit My Organization?

- It enables faster processing for publishing Online Courses in bulk.
- It provides a clear display of the courses uploaded in the Publication.
- Useable data surfaced - Number of courses and selected Provider.
- It saves a significant amount of time for Content Uploader administrators and eases the transition from the Course Publisher to the Content Uploader.

Considerations

- This enhancement does not change the existing functionality of Publishing an individual Online Course in the Course Console. It only adds the ability to Publish in bulk.
- Only courses uploaded as part of the same Publication can be published in bulk via the View Courses page.

Frequently Asked Questions (FAQs)

What is a Publication?

The publication is the zip file uploaded to Content Uploader or Edge Import; the zip file might contain one or more Online Courses.

Can I report on the Publication File Name?

You can report on the File Name in Reporting 2.0 under the field "Course Publication Title."

Is there a limit to how many courses I can publish at the same time?

All the courses in the same Publication can be Published in bulk regardless of how many courses there are inside.

Why can't I find my Publication in the Content Uploader's Draft section?

The publication record is removed from the Draft Ready section of Content Uploader when one or more courses are published inside that Publication. Please go to Content Uploader > Upload History > View Courses.

Upload History doesn't have a search option, so I can't find my Publication.

The Upload History has been enhanced to have Search and Filtering capabilities and can be used to find the publication.

Implementation

This functionality is automatically enabled for all organizations using the Learning module. Users with existing "Online Class - Publish" permission can see the "View Course(s)" option in Content Uploader and Upload History. The same constraints will apply as the user's "Online Class - Publish" constraints.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Online Class - Publish	Grants access to two pieces of functionality: • Publish button on the Course Console, allowing administrator to publish a draft online class • Upload section of the online class versioning workflow	Learning - Administration
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration
Content Uploader - Manage Uploads with Undefined Providers.	Allows administrators to view and manage uploads with undefined providers on the Uploads History page.	Learning - Administration
Upload History - View	Grants ability to view the Upload History page.	Learning - Administration
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console	Learning - Administration

	(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.*	
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

New Content Uploader page - View Course(s)

With the March '24 release, the Content Uploader page has newly added functionalities in its user interface (UI). Apart from the Date, Status of upload, and Delete, the Content Uploader page also includes the Number of Courses, Provider, and the View Course(s) button.

Before

After
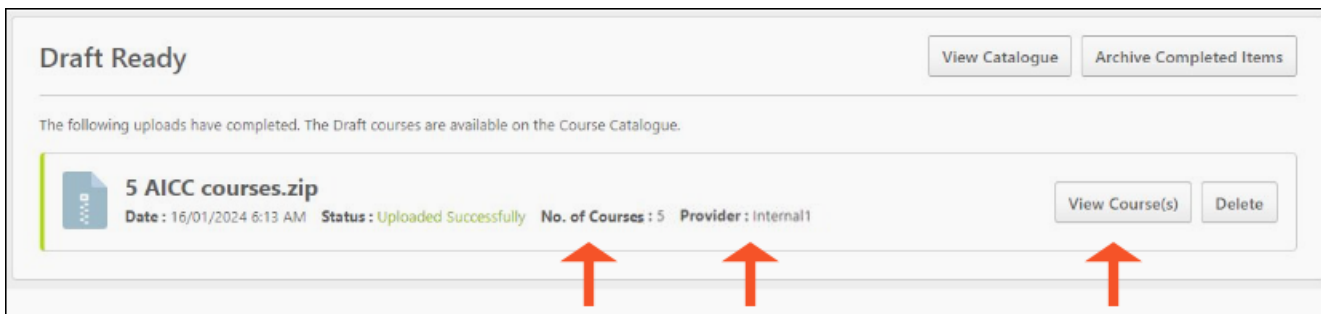
The View Course(s) page displays the following features:

- A field for Search & Filtering

- Zip File Details

- List of Courses

- Publish button

Once published, the publication status is shown as per the below image:

	Title		Training Object ID		Publication Date	Publication Status
☐	Corporate Social Responsibility: CSR and the Triple Bottom Line		6cnb1c00-cd17-48b8-ad54-d86c4ef345ae		16/01/2024 8:57 AM	Published
☐	Seeing is Believing: Anti-Racism, Equity & Inclusion in a Diverse Workplace		2183ca44-ceee-4883-b106-d780aeb5e4c4		16/01/2024 8:57 AM	Published
☐	Corporate Social Responsibility: Carroll's CSR Pyramid		464fa084-c3d3-4ae1-b310-b1786dd22a5d		16/01/2024 8:57 AM	Published
☑	Corporate Social Responsibility: Benefits and Limitations		5a6919a8-f33b-414c-99ee-a67473f16828			Draft
☑	Corporate Social Responsibility: Stakeholders and CSR		7f70a7d-762e-4a30-b90b-0fa6eb98075			Draft

Back   Publish   5 Results

The View Course(s) page is accessed directly from the Content Uploader page or by going to CONTENT UPLOADER > UPLOAD HISTORY > ACTION > VIEW COURSE(S).

Draft Ready

View Catalogue   Archive Completed Items

The following uploads have completed. The Draft courses are available on the Course Catalogue.

5 AICC courses.zip
Date : 16/01/2024 6:13 AM   Status : Uploaded Successfully   No. of Courses : 5   Provider : Internal1

View Course(s)   Delete

🏠 Tools   Learning   Upload History

Upload History

FILE NAME ⬍	DATE ⬍	OWNER ⬍	STATUS ⬍	PUBLISH STATE ⬍	ACTION
5 AICC courses.zip	16/01/2024 6:13 AM	sudip thakur	Completed	Pending Publish	▾
ModernSlavery.zip	16/01/2024 2:21 AM	Sam Smith	Completed	Pending Pul... Delete	
aicc_7crse.zip	15/01/2024 1:49 AM	Sam Smith	Completed	View Course(s)	
BVSCourse.zip	11/01/2024 9:20 AM	Anthony Delarosa	Completed	Pending Publish	▾

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

Download Online Course Publication Files From Course Console

Download Online Course Publication Files From Course Console

Prior to this enhancement, the administrators had to rely on support and engineering teams to request and retrieve course files.

With this enhancement, administrators can download uploaded course files from the Course Console page, such as AICC, SCORM, and xAPI files, without requesting support and engineering teams. The Course Console page now includes a download option for Online Courses and the Online Course Publication ID.

The Course Console page now has two additional fields in the Content section:

- Publication ID
- Download

The previously titled "Allow Download" field has been renamed to "Allow Download for Network Player."

Before

After

How Does this Enhancement Benefit My Organization?

- Provides enhanced independence for content management by reducing reliance on support teams.
- Allows access to the most up-to-date course files, e.g., when troubleshooting versioning and content modification issues.

- Reduces time spent on file retrieval.

Considerations

The following are excluded from having a download option in the Course Console:

- Learning Objects that are not Online Class LO Type
- Content Anytime Subscription Courses
- Á La Carte (ALC) Subscription Courses
- Online Content LO types (Percipio, Coursera, etc.)
- LinkedIn Learning courses
- Courses in Draft status
- Historical Data Load (HDL) courses

Frequently Asked Questions (FAQs)

What is a Publication?

The publication is the zip file uploaded to Content Uploader or Edge Import; the zip file might contain one or more Online Courses.

Can I pull a report on the Publication ID?

There is no current way to pull a report on the Publication ID. However, you can pull a report on the zip File Name of the courses; courses from the same publication will have the same zip File Name. Reporting 2.0 field: "Course Publication Title."

Do you know if I will get an email when my download is ready?

This feature does not support email notifications. Admins can use the refresh option next to the download request or visit the page later.

Do you know if I can download multiple course files in bulk?

No, the closest to the Bulk Download option is if the course was uploaded as part of a Publication with multiple courses inside, in which case the downloaded file will include all the courses from the same Publication.

Can I go to a Previous Version of the course and download the course files?

Yes

Which files will be downloaded if I use Modify Content to modify the course?

The most up-to-date modified files will be downloaded.

Where are the files downloaded to?

User's local computer folder, based on their browser configuration.

Is there a size limit on the courses I can download?

There is no size limit; however, the processing time to prepare the download would be longer for larger courses. Please use the refresh option or return to the page to see the available download.

Implementation

The availability of this functionality is controlled by a permission, which is disabled by default. To enable this permission, contact Global Customer Support

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Online Class - Download Files	Grants access to the download option in Course Console for administrators to download Online Class zip files.	Learning - Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Publisher Update	Grants ability to update existing online training courses previously published via the course publisher. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator permission. With the Oct '17 release, after the Content Publisher is activated in the system, users with this permission are automatically granted the permission to modify online classes.	Learning - Administration
Course Publisher	Grants access to LCMS Course Publisher, which enables upload and publishing of SCORM and AICC compliant online courses, created either in the LCMS Course Builder, or from a third party course building tool. Administrators must also be granted a content license from the Manage Licenses page. This is an administrator permission. After Content Publisher is activated in the system, users with this permission are automatically granted the permissions to upload and publish online classes via the Content Publisher, and also the permission to view the Upload History page.	Learning - Administration
Course 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.	Learning - Administration

	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.*	
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

Security Role

Upon release, the administrators must grant the new Online Class - Download Files permission with the appropriate constraints to other roles.

Downloading Online Course Publication Files From Course Console

The Download field is only available to users with the "Online Class - Download Files" permission. The download process allows downloading a zip file of the Publication folder containing the requested course. The Publication file might include one or more courses, depending on what was originally uploaded.

The download process includes four stages:

- Generate Download Link
- Processing
- Download Ready
- View Errors | Retry

Generate Download Link

Click **GENERATE DOWNLOAD LINK** to trigger a disclaimer, after which the download process starts. The download process is asynchronous and takes a few minutes or more, depending on the course size.
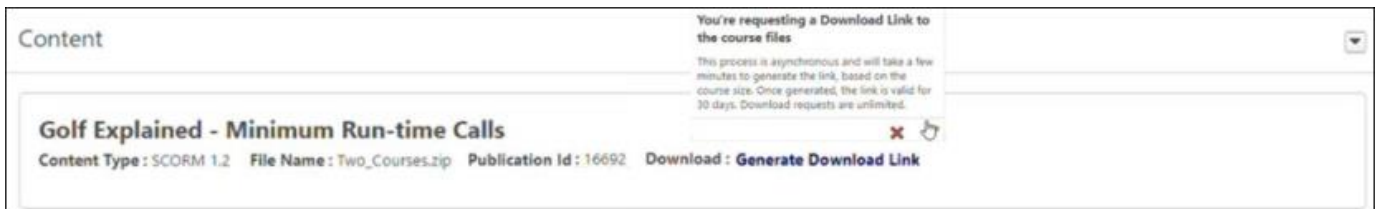
Processing

The download status moves to "Processing" until the file is ready to be downloaded. Use the "Refresh" option next to the "Processing" text to see the latest status. The page can be left and returned to later. The download status moves to "Download Ready" after processing.
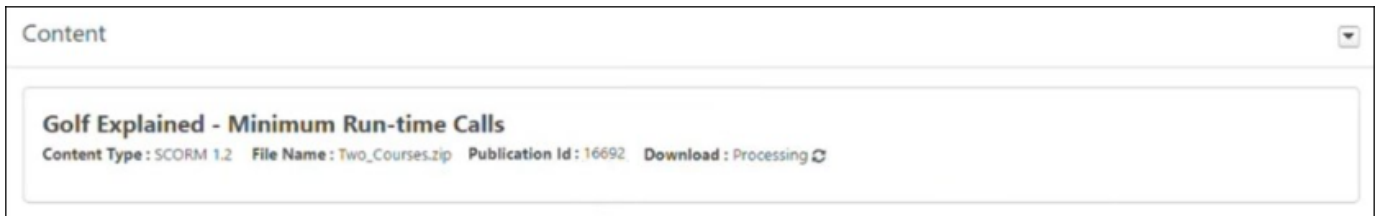
Download Ready

Click **DOWNLOAD READY** to download a zip file of the content locally. A few points to remember are as follows:

- The "Download Ready" status is valid for 30 days. After 30 days, the "Download Ready" status resets to "Generate Download Link."
- Generating the Download is an unlimited action.
- The "Download Ready" status allows users with the "Online Class - Download Files" permission to download the files.
- Modifying the course using the "Modify Content" option resets the download status to "Generate Download Link."

View Errors | Retry

Admin can "Retry" the download request if errors occur.

- Click **VIEW ERRORS** to display the errors encountered.
- Click **RETRY** to move the Download status back to "Processing."

The downloaded zip file name will be **TrainingObjectID_filename.zip** if the requested course was the only course inside the zip file initially uploaded. The content of the downloaded zip file will include the course files of the requested course. The downloaded file name will be **PublicationID_filename.zip** if the requested course was one of multiple courses inside the zip file initially uploaded. The content of this downloaded file will include the course files of all the courses uploaded in the same Publication as the requested course, including the requested course.

Courses uploaded as part of the same Publication will all have a "Download Ready" status if one of the courses in the Publication had a successful download generated by an administrator.

"Failed" Status for Online Content

Prior to this enhancement, Online Content did not support a "Failed" status, and failed Online Content usually remained in an "In Progress" status. This meant that users, managers, and administrators could not tell if the user was indeed "In Progress" or if they had failed and were stuck "In Progress."
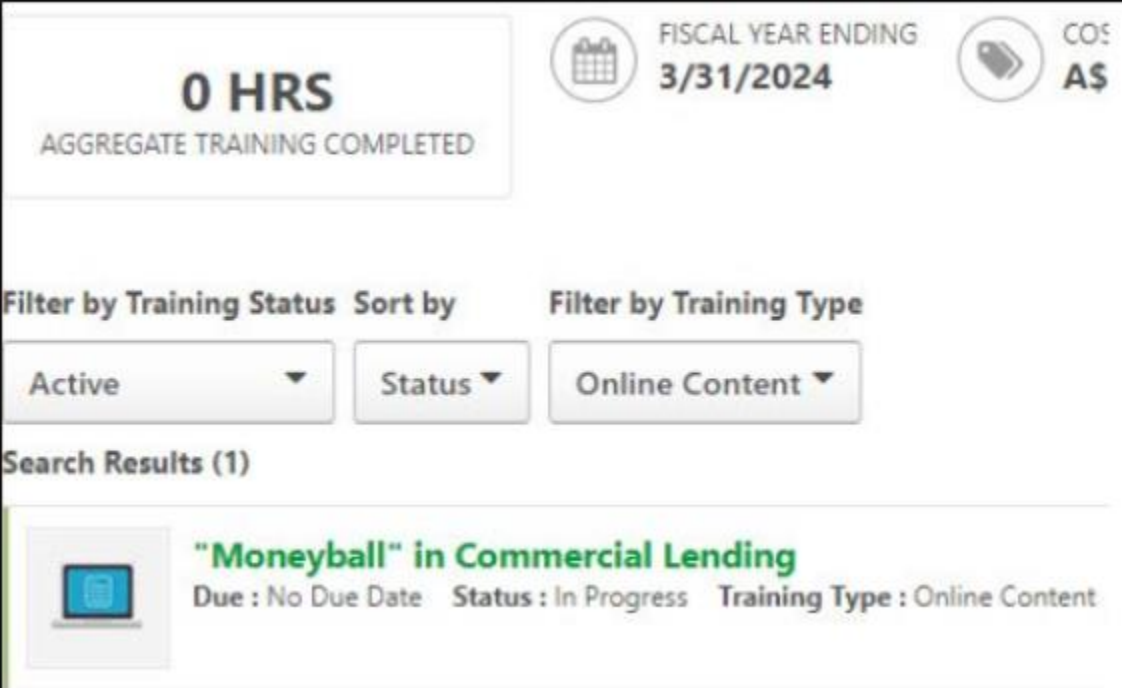
With this enhancement, the Online Content LO type displays a "Failed" status, allowing the users, managers, and administrators to differentiate between an Online Content course that is in progress and an Online Content course that has failed.

Note: *This functionality is already available for AICC and SCORM 1.2/2004 courses.*

The key features of this enhancement are as follows:

- It displays a "failed" status in the user's transcript.
- In Reporting 2.0, the "Transcript Status" field will show a value of "Failed" and the "Passed" field will show a value of "No."
- It provides Edge Import Online Content transcript support for the "Failed" status.

Before

After

Reporting Fields

No reporting fields are added, but you can see more Online content-related information with existing reporting fields.

FIELD NAME	SECTION AND SUB-SECTION	FIELD TYPE (NUMERIC, TEXT, DATE)	VALUE (IF APPLICABLE)
Passed	Learning > Transcript	Boolean	No
Transcript Status	Learning > Transcript	Text	Failed

How Does this Enhancement Benefit My Organization?

- Provides a high-level view of success rate in Online Content for users across the portal.
- It helps you understand which team members need support to pass specific courses.
- It helps you know which courses you have successfully completed and which you might need to take again.

Frequently Asked Questions (FAQs)

Where will I be able to see if an Online Content course failed?

Either in the User's transcript or via reports.

How can an Online Content course be marked as failed?

There are two options for it to be marked as failed:

- The provider sends a progress update to CSX, indicating that the Online Content course has failed.
- The Online Content course is marked as "Failed" via an Edge Import load or feed.

Can a "Completed" course be later marked as "Failed"?

No, a "Completed" course is locked in this state and cannot be updated by a provider or Edge Import to a "Failed" status.

Will this retroactively work for Online Content courses for which the provider previously sent a "Failed" status?

No, this will only work for new progress updates sent after the portal has activated the feature.

Implementation

The enablement of this functionality is controlled by a backend setting, which is disabled by default. To enable this functionality, contact Global Customer Support. This functionality is available for all organizations using the Online Content training type in the Learning module.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Transcript Item	Grants ability to view details of learning objects that appear on the transcript (training record), by clicking on the name of the learning object. Users must also have the Bio About - View permission in order to access the transcript within Universal Profile. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, or User's Self. This is an end user permission.	Learning - Administration
Access LMS - OLCO Metadata Feed	Grants access to the Online Content Metadata data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Metadata Load	Grants access to the Online Content Metadata data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Feed	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data feed via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
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

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.

Hiding Legacy Skills on Bulk Edit and Refine Search

There are two systems of skills in CSX: (legacy) Skills, with very low adoption on content, and Cornerstone Skills Graph Skills (aka Capabilities), used throughout CSX.

Having both skills systems live in a single LMS content catalog is, understandably, confusing for customers. In November 2023, the (legacy) Skills Tab was removed from the Course Catalog user interface for all customers except those who "opted out" of the deprecation. However, we did not remove (legacy) Skills from the Bulk Edit and Refine Search pages. With the March 2024 release, we are removing (legacy) Skills from Bulk Edit and Refine Search for all customers except those who "opted out" of the (legacy) Skills Tab deprecation. The deprecation of (legacy) Skills from Refine Search affects Course Catalog and Global Search pages.

To access the (legacy) Skills tab in Bulk Edit, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG . Clear **Enable Enhanced Search** checkbox and select multiple Learning Objects. Click EDIT SELECTED > EDIT SKILLS. To know more about Bulk Edit, *See Batch Edit Course Catalog Items.*
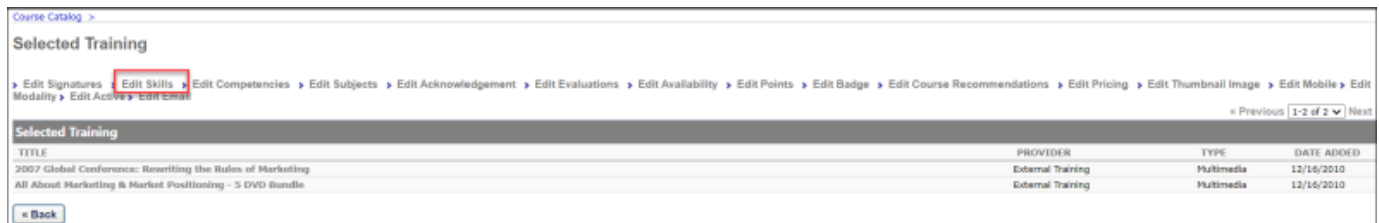
To access the (legacy) Skills tab in Refine Search, go to ADMIN > PREFERENCES > SEARCH PREFERENCES > TRAINING. Scroll down to Skills filter under Refine Search Options. To know more, *See Search Preferences - Training.*
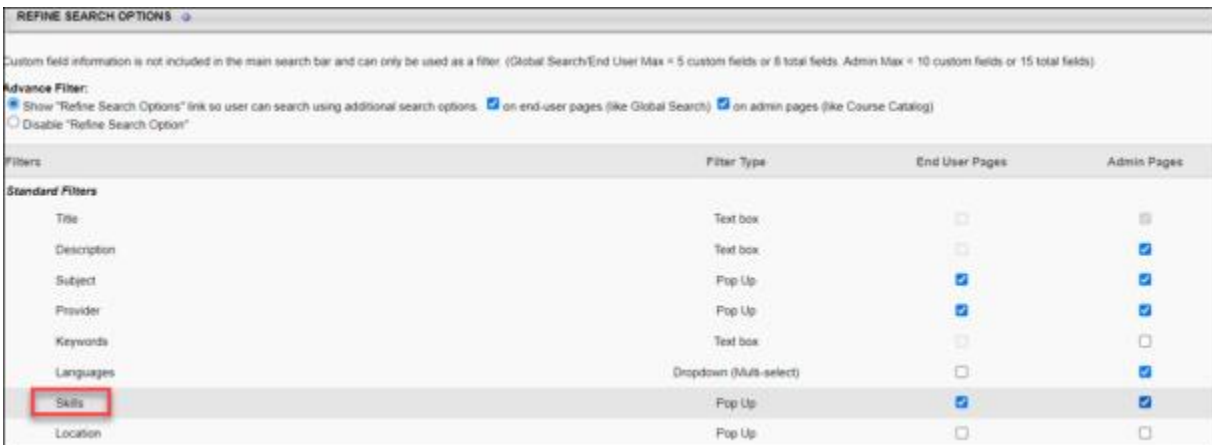
How Does this Enhancement Benefit My Organization?

The (legacy) Skills field no longer appears on the Bulk Edit and Refine Search in Course Catalog and Global Search pages (except for customers who "opted out" of the (legacy) Skills Tab deprecation.)

Implementation

The deprecation of (legacy) Skills from Bulk Edit and Refine Search is by default. No activation is required. The customers who "opted out" of the (legacy) Skills Tab deprecation will continue to see (legacy) Skills on Bulk Edit and Refine Search pages.

Learning - Extended Enterprise

Shopping Cart Enhancements (Open Beta)

Shopping Cart Enhancements (Open Beta)

Extended Enterprise learners currently encounter challenges navigating through the user interface and experiencing difficulties adding, modifying, or removing items from their shopping cart. This is primarily attributed to an outdated design, resulting in a negative user experience while purchasing training courses.

Enhancements to the Shopping Cart will deliver a more user-friendly interface and improved experience for extended enterprise learners when buying training courses. The upgraded and redesigned layout ensures learners benefit from enhanced navigation and an intuitive interface while interacting with the Shopping Cart.

The key features are as follows:

- A new shopping cart flyout to enable learners to effortlessly add, modify, or remove items from their cart.
- Enhanced checkout page workflow
- Improved order confirmation page
- Revamped user interface (UI) and user experience (UX)

As the Shopping Cart Enhancement is released as an Open Beta with the March 2024 release, it is not activated by default.

The Shopping Cart Enhancement requires activation via Feature Activation Preferences. To do this, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > FEATURE ACTIVATION PREFERENCES. In the **Activate New Shopping Cart** section, click **ACTIVATE**.

How Does this Enhancement Benefit My Organization?

- Enhanced capability and seamless experience for Inventory Managers to purchase training in bulk for their subordinates.
- Extended enterprise learner's check-out experience is optimized. An improved shopping cart UI and UX provide them with an intuitive, consumer-grade interface.

Considerations

- In line with new security guidelines (PCI Compliance), we will enhance the security of Payment Gateways during the Open Beta scheduled for March '24. The payment gateways that are in scope are below: (The next few slides will mention the actions from the customer perspective as there will be additional "Client Key Configuration" in the "Modify Payment Account" Page in CSX under E-Commerce.)
    - Adyen
    - Stripe
- For CyberSource and other Payment Gateways (NIC, PayPoint), the changes will be deployed with the November '24 Release, and a separate communication will be sent between the March '24 and July '24 Release with more details to be updated in the Open Beta Community in Client Success Center (CSC).
- Inventory Assignment from the Order Confirmation Page is out of the scope of the March '24 Open Beta.
- For certain credit card payments, 3D secure with a one-time password (OTP) is out of the scope of the March '24 Open Beta to be considered for July '24 Early Adopter (EA).
- Additional Payment Error Code mapping and messaging is out of scope and will be part of July '24.

- Share functionality on the Order Confirmation Page is out of scope and will be part of July '24 EA.
- Launching purchased training from the Order Confirmation Page is currently out of scope and will be part of July '24 EA; Learners can go to the Transcript page via the "Go to Transcript" link to launch purchased training.
- In the current scope, the instruction text on the Cart Flyout Page and Checkout Page will get the details from the Admin Shopping Cart configuration under Admin > Tools > Learning > E-Commerce > Shopping Cart; it will only read the text and not HTML. For July '24, this will be further improved for Learners and Admins, which is done to make the pages responsive to any resolution (HTML support will be deprecated with the July '24 release).
- Not all the pages will be mobile-ready (Web Application in Mobile) for open beta and will be addressed with the November '24 General Availability (GA).
- If the entire Training Unit Key Code balance is utilized, then the remaining can be paid with a Credit Card or PO, but as per current functionality, it will purchase the Training Units (TUs) first, and then TUs will be used to purchase training.

Considerations for Adyen

- Customers must log into the Adyen Business Account Sandbox using the Business Account Credentials already with them.
- Once logged in, Go to DEVELOPERS > API CREDENTIALS > BUSINESS ACCOUNT (USED FOR INTEGRATION IN CSX) > CLIENT SETTINGS > CLIENT KEY.
- Either generate a new Client Key or use the already generated Client Key and Copy.
- Add the Copied Client Key in Adyen Integration configuration in CSX under TOOLS > LEARNING > E-COMMERCE > MODIFY PAYMENT ACCOUNT > CLIENT API KEY.

Considerations for Stripe

- Customers must already log into the Stripe Business Account Sandbox using the Business Account Credentials.
- Once logged in, Go to DEVELOPERS > API KEYS > STANDARD KEYS > PUBLISHABLE KEY.
- Either generate a new Publishable Key or use the already generated key and Copy.
- Add the Copied Key in the Stripe Integration configuration in CSX under TOOLS > LEARNING > E-COMMERCE > MODIFY PAYMENT ACCOUNT > CLIENT API KEY.

API keys

Learn more about API authentication →

ⓘ **Viewing test API keys. Toggle to view live keys.**

Viewing test data

Standard keys

These keys will allow you to authenticate API requests. Learn more

NAME	TOKEN	LAST USED	CREATED	
Publishable key	pk_test_51LkDJsKuHl149Ffap8X60I56cSR4Ju9vL255U T4lRkCCzqODPYw1XX2Knh9zAzwVFaWvtYr5rl75wHDR1JO uMatc00F1axsDKT	Jan 14	ⓘ Sep 20, 2022	...
Secret key	[Reveal test key]	Jan 14	ⓘ Sep 20, 2022	...

Frequently Asked Questions (FAQs)

Will this enhancement be available in production and Pilot portals?

No. Since this is an open beta stage only, it will be available only in the stage portal through the Feature Activation Tile.

Can Learners switch between old and new Shopping Cart views and vice versa?

Once the Feature has been activated under the Feature Activation Tile, Learners can switch between the old and new views with the "Switch Now" Link.

Can this feature be disabled?

This can be deactivated using the "Deactivate" button under the Feature Activation Tile.

Once the Learner switches between the new and old views, will it impact the Shopping Cart items?

No, this will not impact the items added to the Shopping Cart.

Is the CSX Learn App also part of this enhancement scope?

No, CSX Learn App is not part of this enhancement, but pages will be responsive when viewed in Mobile Web App and All the pages will be Mobile ready by July'24 EA.

Will this enhancement also consider the EXE B2B, B2C Subscription Feature?

No, this is not in the scope of enhancement and overall project delivery for this year.

Will a dedicated Open Beta community exist in the Client Success Center (CSC)?

Yes, there will be a dedicated Open Beta community in CSC for Customers to provide feedback and get additional details on further plans. This is in progress and will be ready to be communicated shortly.

Will Custom Payment Methods be part of the scope of Open Beta?

No, this is not part of the scope of Open Beta and is to be considered for a future release.

Will E-Check and Wire Transfer Payment Methods be supported with Open Beta?

No, this is not supported, and since the usage is low, this is planned for a deprecation with a future release. Customers who are using this today need to provide feedback in the CSC.

Will Learners be able to see the order details for the purchased item later?

Per current functionality, order details can be viewed under My Account > Orders. This page is not currently in the scope of redesign for this year.

What is PCI Compliance?

PCI compliance is compliance with The Payment Card Industry Data Security Standard (PCI DSS), a set of requirements to ensure that all companies that process, store, or transmit credit card information maintain a secure environment. (**https://www.pcisecuritystandards.org**)

Implementation

This functionality is available in stage portals for all organizations using the Learning module.

This functionality is controlled by a feature activation setting, which is disabled by default. It can be self-activated via Feature Activation 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
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

Shopping Cart Enhancements - New Features

New Cart Flyout - Learner

- Training items added to the cart will now be accessible on the new Cart Flyout page for subsequent checkout.
- The Cart Flyout page will present a list of training items added to the cart, including the Training Title, Training Type, Description, Price, Subtotal, and Currency.
- The Flyout's upper section will display the item quantity in the cart next to "My Cart" and a customizable text. Additionally, it will feature a dropdown option allowing Learners to choose between Currency and Training Units (TUs), provided TUs are activated in the portal.
- Learners can delete items from the cart using the delete icon and can "Undo" this action if needed. If multiple items are removed, the option to undo will be available for the last item removed from the cart.
- Learners can proceed to checkout or close the cart using the 'X' icon.
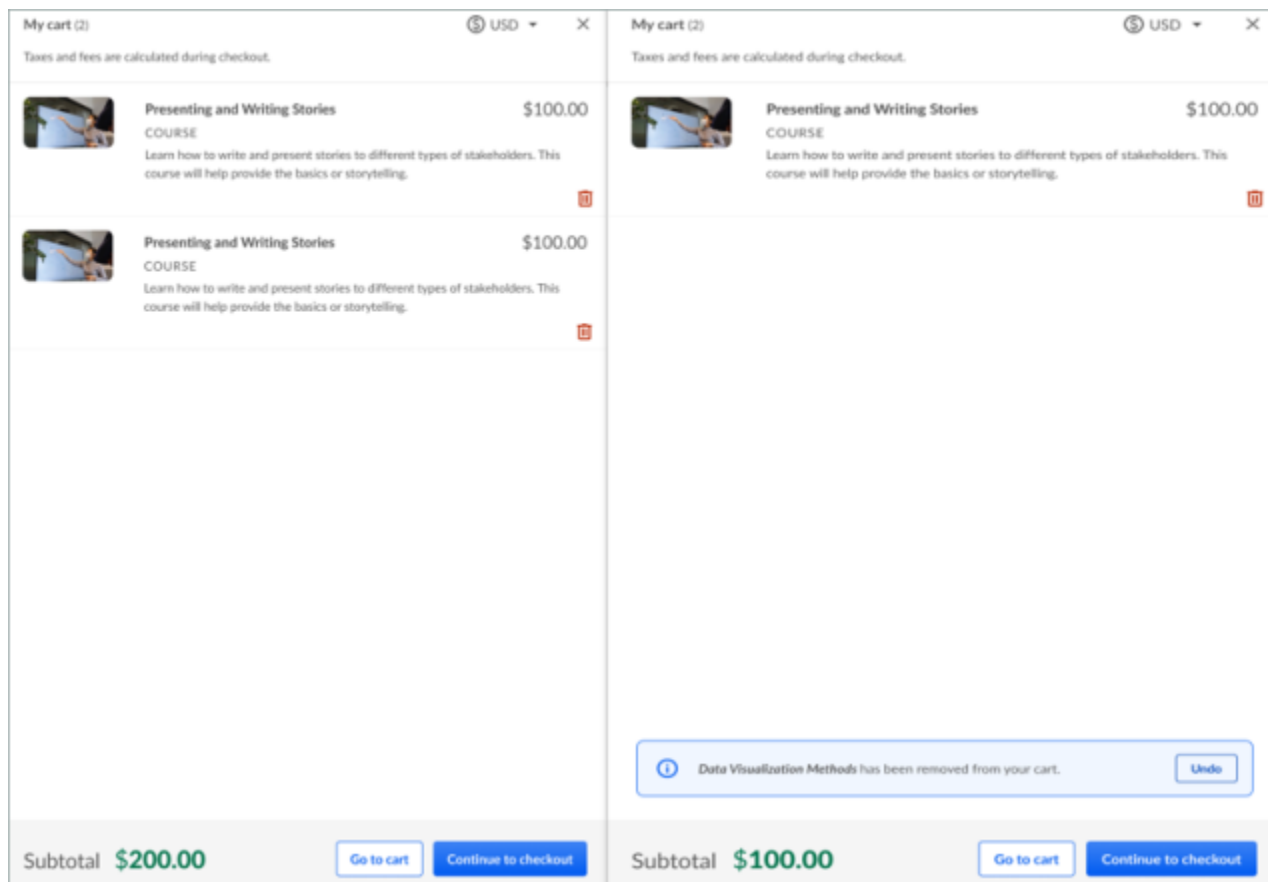
New Cart Flyout - Inventory Manager

- Inventory Managers can purchase training in bulk by adjusting the value in the quantity field for the respective item.
- Inventory Managers can also buy training for themselves and add it to the Cart flyout for further checkout.

- Any discounts associated with the Cost Center will be displayed at the bottom if applicable and configured.
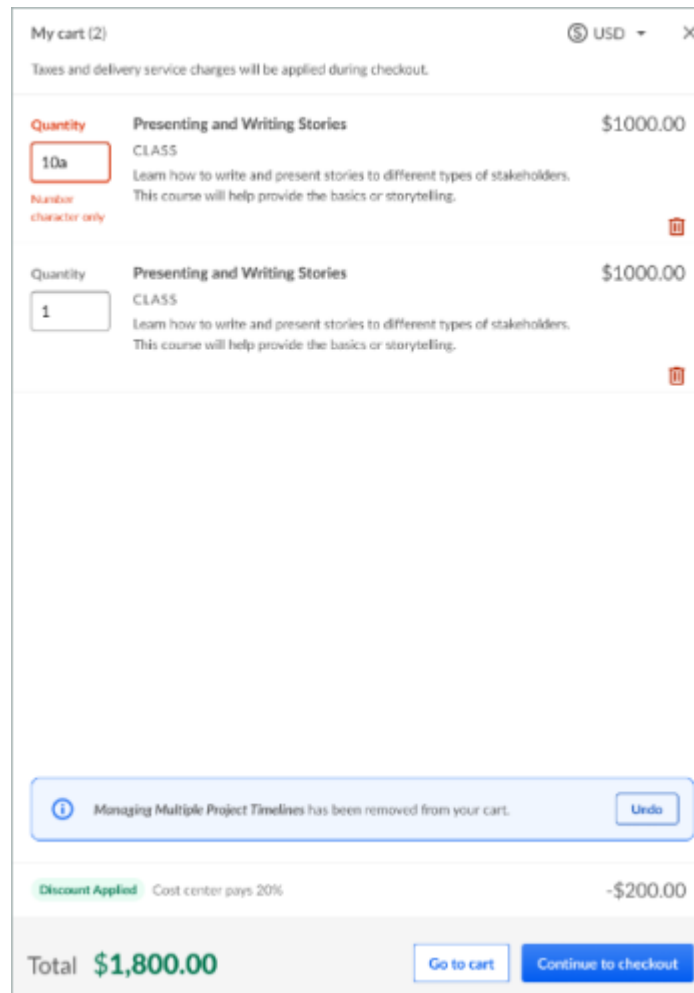
Empty Cart State

- When no items are in the cart, learners will see a message stating, "Your cart is empty."
- Learners will be presented with suggested training based on their role at the bottom.
- The suggested training card will show the Subject, Training Title, Training Type, and Description of the Training recommended.
- Only two cards will be shown for the suggested recommendations.

My cart $ USD ▾ ✕

Your cart is empty

Suggested for you

| Project Managment | $200 | Project Managment | $200 |

Managing Multiple Project Timelines
CURRICULUM
Practice and learn the best ways to manage multiple projects at once.

Managing Multiple Project Timelines
CURRICULUM
Practice and learn the best ways to manage multiple projects at once.

Total **$00.00**   Go to cart   Continue to checkout

Payment Checkout Page

- When learners are ready to purchase, they can move to the checkout page directly from the Cart Flyout page.
- At the top of the page, there will be an instruction text for learners.
- Learners can apply Discounts or Coupons if applicable for the purchase and enter the Coupon Code.
- Learners can also utilize Training Units (TUs) or Training Unit Key Code if it has been distributed to them by administrators or if they have purchased it to buy Training.
- The order Summary section will show itemized details for the purchased training and any applicable discounts or TUs if used for purchasing.
- Learners can submit payment using payment methods such as credit card, purchase order, or PayPal.
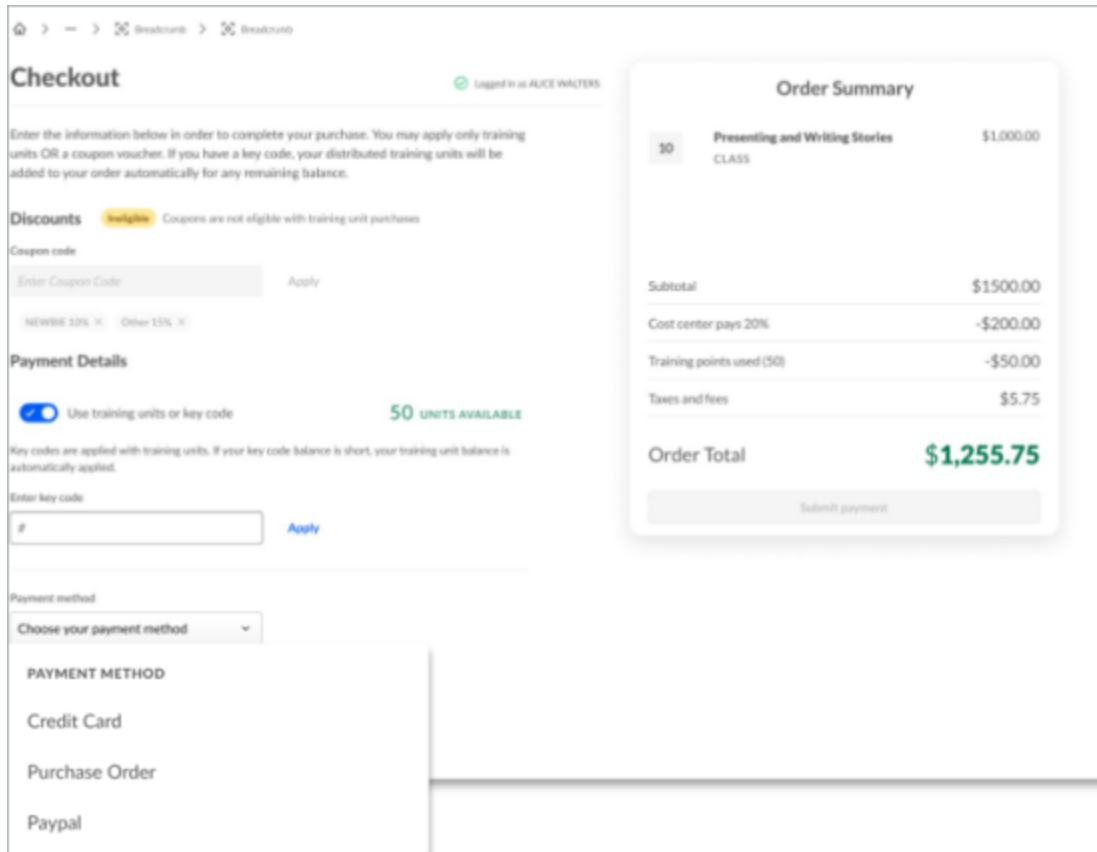
Order Confirmation Page - Learner

- Upon successful purchase, learners can review the Order Details on the Order Confirmation Page.
- Learners can print or download the Order Details from the confirmation page using the respective links.
- The page will show Transaction Details and Itemized Order details for the training items purchased.
- On top of the page below the thank you message, an instruction text will be available for Learners.
- Learners can visit the transcript page with the link to launch purchased training. (Maximum three training cards in this section).
- Return Home button will redirect the Learner to the Learner Home Page.
- Based on the current functionality, Order History will be available for the Learner on the My Account Orders page.

Order Confirmation Page - Inventory Manager

- Inventory Managers will additionally see the Assign Purchase Inventory section on the Order confirmation Page.
- A maximum of two cards will be shown in the Assign Inventory section, and it will have a link to go to the Inventory Management Page for assignment to the Learners.
- Itemization will show all the details, including the quantity of items purchased in bulk.
- If the Managers will be purchasing training for themselves and the inventory, they will be able to see both the sections - Assign Purchased Inventory and Purchased Training.

Validations and Errors

- Invalid Quantity – When the Inventory Manager enters the invalid quantity (Maximum quantity supported is 999).
- Payment Failures: A pop-up is shown in case there are any failures related to payment.
- Discounts Eligibility: Coupons are not eligible with training unit purchases.

New view vs Old view Switching

- Once the Shopping Cart is activated, learners can switch between the new UI and the old UI with the help of the "Switch Now" link.
- The Switch will not impact the items added to the cart.

Old View

New View

Payment Methods

New Shopping Cart Enhancement will support the following payment methods:

- Credit Card
  - CyberSource
  - Adyen
  - Stripe
  - NIC Colorado
  - PayPoint
- PayPal
- Purchase Order/ Send Bill/ Invoice
- Training Units Distributed
- Training Units Key Code

Existing functionality will remain the same for checkout.

Stripe Tax - Standalone Feature for Any Payment Gateway
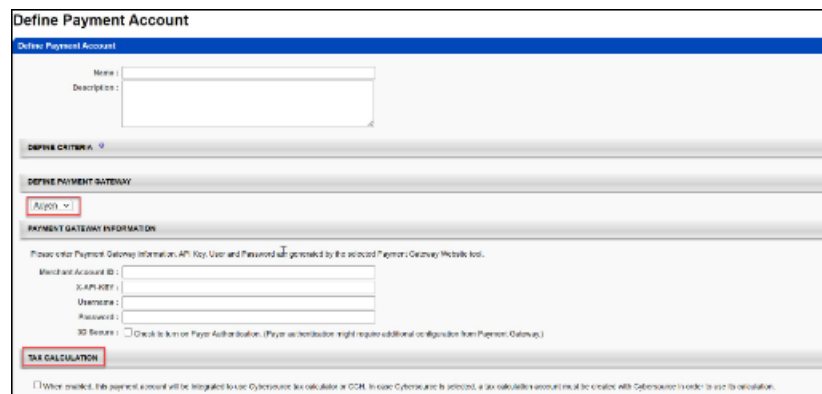
Prior to this enhancement, payment gateways within Cornerstone Learning for Extended Enterprise (CSX EXE), like Adyen, Paypoint, etc., did not have a 'Sales Tax' calculation service feature. Customers using payment gateways that did not provide a Sales Tax calculation service could not collect the sales tax amount from their end users for the transactions made in CSX EXE.

With this enhancement, customers who use payment gateways within CSX EXE to sell courses and want an additional Tax service can now use the Stripe tax feature to add the sales tax to the purchase price of the products they sell through CSX EXE during the transaction. It is a standalone feature and is independent of the Stripe payment gateway.

The following key functionalities accompany the new feature:

- Easy to register with Stripe.
- Automatically collect the right amount of Tax.
- Customers can easily access the reports within Stripe to file returns.

Before

After

Note: *Stripe Tax is now available for other payment gateways in CSX EXE. Cybersource no longer provides Tax services to other payment gateways.*

Setting up Stripe Tax in CSX user interface

To avail the Stripe Tax service, the customers must have a Stripe account. Set up the regions within your Stripe Account for which the sales tax needs to be calculated. Your Stripe Account ID and secret key are required to complete the setup in CSX EXE under the "Modify Payment Gateway" page.

In CSX EXE, Stripe Tax needs to be enabled via the "Define Payment Account" page. *See Stripe Payment Gateway - Define Payment Account.*

In the "Define Payment Account" page, under the Tax Calculator section, select "Stripe" from the dropdown and enter your Stripe Account ID and secret key that Stripe provided. For more information, *See Stripe Payment Gateway - Tax.*

How Does this Enhancement Benefit My Organization?

- The administrators can collect sales tax upfront using Stripe Tax for most payment gateways available via CSX EXE.
- It is easy to define the specific regions within Stripe for Tax calculation.
- The end user gets a clear visibility of the Tax that needs to be paid for the given transaction.

Considerations

- Stripe tax is now available for Adyen, NIC Colorado, and PayPoint Payment gateways.
- Stripe tax was already available for Stripe Payment Gateways users.
- Stripe tax is not available for Cybersource and PayPal payment gateways.

- Customers need a Stripe payment gateway account to use the Stripe tax service.
- Customers need to set up the regions in their Stripe account for which they want to collect Sales Tax.
- Stripe Tax can be calculated based on the billing address only.

Frequently Asked Questions (FAQs)

Do we need an account with Stripe to use the Stripe Tax service?

There is no need for any new Stripe account for customers already using a Stripe payment gateway account. Customers who use a payment gateway other than Stripe must create an account with Stripe.

How do we enable Stripe tax?

Please reach out to your Account Manager for activation.

Implementation

To enable this functionality, please contact your account manager to allow the Tax Stripe feature within CSX EXE.

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

Legacy "Transcript And Task" APIs - Optional Constraints

Legacy Transcript and Task APIs - Optional Constraints

To align with the newer Transcript APIs, the legacy Transcript and Task APIs are now supporting the following Constraints:

- **GetAssignedTrainings** - /services/api/TranscriptAndTask/Assigned
- **GetSessions** - /services/api/TranscriptAndTask/Session
- **GetSuggestedTrainings** - /services/api/TranscriptAndTask/SuggestedTraining
- **GetTranscripts** - /services/api/TranscriptAndTask/Transcript

This setting is optional and can be controlled via an **Additional Claim**. For more details, check out the developer documentation in the Developer Portal: **https://csod.dev**

LinkedIn Learning Integration - Course Filtering Based on Language

Prior to this enhancement, customers had to receive all the courses that LinkedIn Learning Integration (LIL) was sending, even if they were in a language irrelevant to them.

With this enhancement, customers can choose only to receive LIL courses in available and active languages in their portal. When enabled, courses set to inactive or unavailable language in the portal will not be ingested. This will result in fewer courses, removing courses irrelevant to users.

The key features of this enhancement are as follows:

- The portals will only receive LIL courses in languages that are relevant to them.
- All LIL courses will show in their correct languages and will not default to English US.
- The inactive languages will not be reactivated in the portal following a LIL course ingestion.

How Does this Enhancement Benefit My Organization?

- The administrators have to sort through fewer LIL courses to find the best suited for their users.
- There is no option to accidentally stumble on a LIL course listed with English US as the available language but in a language not available in the portal.

Considerations

This enhancement is only relevant for customers that use the LIL integration available in Edge Marketplace.

Frequently Asked Questions (FAQs)

When enabled, will this enhancement retroactively remove existing LIL courses and turn off any existing languages?

No, this enhancement only affects LIL course ingestions that happen after it is enabled.

Implementation

The availability of this functionality is controlled by a backend setting, which is disabled by default. To enable this functionality, contact Global Customer Support.

Microsoft Teams vILT Integration Enhancements

Microsoft Teams vILT Integration Enhancements

Prior to this enhancement, limitations hindered efficient collaboration during MS Teams sessions, with a lack of support for adding co-organizers. The virtual training environment lacked customization options, restricting users from tailoring their learning experience. Also, inefficient session management practices, such as unnecessary session deletions and creations, resulted in a less streamlined user experience.

With this enhancement, Cornerstone offers its users an efficient, optimized, and versatile virtual training experience with the following features:

- **Ability to add Co-organizers to MS Teams session for support** - By enabling the addition of co-organizers, the enhancement promotes collaborative session management and distributes responsibilities among multiple collaborators.
- **Support for Extended Options** - This enhancement provides users with a more enriched and customizable experience by introducing extended options support.
- **Session Update Logic Improvement** - This optimization tackles the inefficiencies in session management practices. It eliminates unnecessary session deletions and creations, resulting in a more streamlined user experience.

How Does this Enhancement Benefit My Organization?

- Administrators can designate primary and secondary instructors, distribute responsibilities, and manage sessions more effectively.
- The ability to delegate tasks to co-organizers ensures the workload is distributed, allowing administrators to focus on higher-level aspects of session management.
- With the support of multiple organizers, managers and instructors can work together seamlessly, share responsibilities, and enhance the overall coordination of virtual training sessions.
- The managers and instructors can customize settings, access detailed insights, and ensure that each session aligns with the unique requirements of the participants.
- Unnecessary session deletions and creations are eliminated, ensuring participants a more stable and seamless virtual training experience.
- With streamlined participation and collaborative features, participants can focus more on the content and interactions, leading to a more engaging and effective learning process.
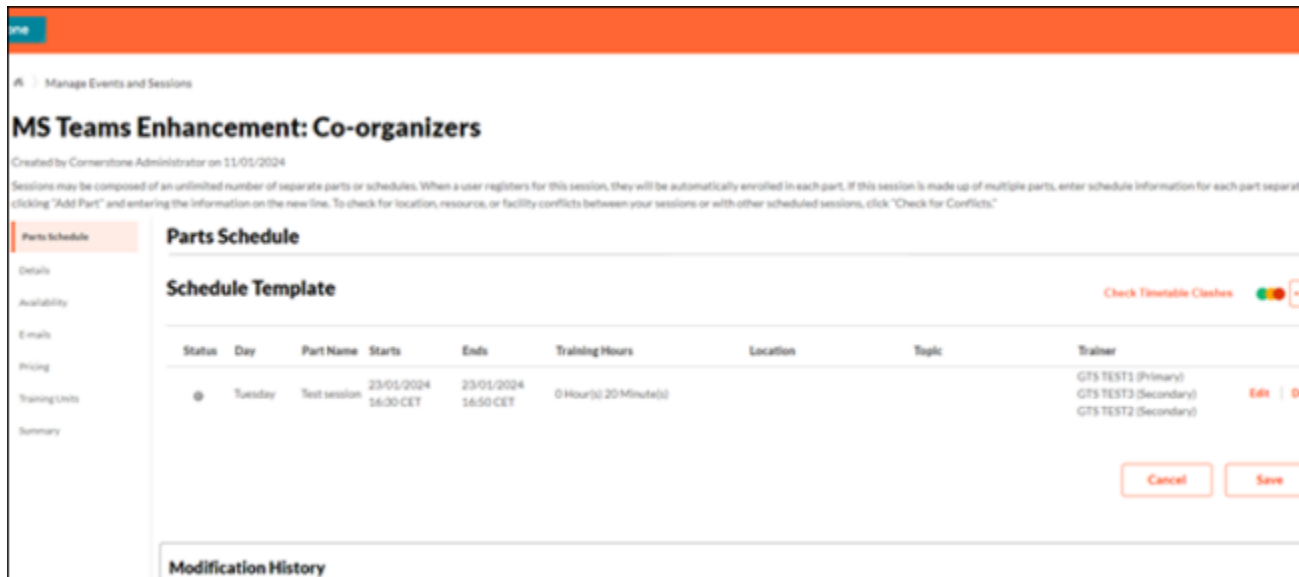
Implementation

This functionality is automatically enabled for all organizations using the Microsoft Teams vILT Integration.

Addition of Co-Organizer Support

MS Teams' Co-organizers feature allows users to delegate meeting management tasks, such as creating breakout rooms and controlling presenters. **Click here to see a comprehensive list of all available features**.

When creating and updating a session using MS Teams integration, the "Primary" instructor is designated as the main organizer in MS Teams. Up to 10 "Secondary" instructors can be added as Co-Organizers to support the meeting. An error message is displayed if an administrator tries to add more than one "Primary" instructor or more than 10 "Secondary" instructors. Saving a meeting without at least one "Primary" instructor results in an error message.

Support for Extended Options

Extended Options is a powerful feature within the vILT module that requires separate self-enablement per MS Teams vendor, not enabled by default. The key features of Extended Options are as follows:

- **Accessing Extended Options** - The list of extended options is conveniently available through the Session Extended Options Link.
- **Admin Control** - Administrators can turn each extended option on and off based on specific needs.
- **Instructor Insights** - Instructors can easily view meeting behavior and settings aligned with the integrated extended options.

To use Extended Options, Please ensure the vILT Extended Options are enabled for the MS Teams provider. To do it, go to ILT > VENDORS & INSTRUCTORS > SELECT THE MS TEAMS VENDOR.

Extended Options allow customers to define and modify settings for each meeting, tailoring them to their unique requirements. The available Extended Options are:

- Allow Attendee To Enable Camera
- Allow Attendee To Enable Mic
- Allowed Presenters
- Allow Meeting Chat
- Allow Teamwork Reactions
- Lobby Bypass Settings
  - IsDialInBypassEnabled
  - Lobby Bypass Scope
- Record Automatically
- Watermark Protection
  - Is Enabled For Content Sharing
  - Is Enabled for Video
- Attendance Calculation

Extended options

( ) Allow Attendee To Enable Camera

( ) Allow Attendee To Enable Mic

Allowed Presenters

○ Everyone

○ Organization

● Organizer

Allow Meeting Chat

● Enabled

○ Disabled

○ Limited

( ) Allow Teamwork Reactions

Lobby Bypass Settings

( ) IsDialInBypassEnabled

Lobby Bypass Scope

○ Organizer

○ Organization

● Organization And Federated

○ Everyone

○ Organization Excluding Guests

Record Automatically
( ) *Updating 'Record Automatically' will generate a new meeting!

Watermark Protection
*Updating 'Watermark Protection' will generate a new meeting!

( ) Is Enabled For Content Sharing

( ) Is Enabled For Video

Session Update Logic Improvement

Previously, the integration deleted the existing meeting in Teams and created a new one during session updates regardless of the modified fields. The enhanced workflow brings the following modifications:

Primary Instructor Modification - If the Primary Instructor is changed, the existing meeting in Teams is deleted, and a new one is created.

Note: *Only when the primary instructor is changed, will a new meeting be created. Any other field would retain the same meeting; the same applies when Secondary Instructors are modified.*

Other Fields Modification - When fields like dates, time zone, or session part name are updated, and the Primary Instructor remains the same, the existing meeting is not deleted and re-created in Teams.

SOAP Transcript API (LOWS.asmx) will be Deprecated with the November '24 Release

Cornerstone's SOAP Transcript API (/webservices/LMS/LOWS.asmx) will be deprecated with the November '24 Release. This will impact only a subset of API customers.

Customers are encouraged to consult with their local IT team who may have created an integration with Cornerstone using SOAP Transcript APIs. Customers who are impacted by this upcoming change will need to take action prior to this deprecation.

In preparation for the phase out of the Transcript SOAP API (LOWS.asmx), Cornerstone created a guide to help customers migrate integrations from SOAP APIs to the newer REST APIs. REST API are much more secure, flexible, and easier to use.

Transcript API Enhancements

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 and Milestone 2 features are now Generally Available (GA) to customers with the March '24 Release. The Transcript API Milestone 3 is available as an Early Adopter to customers with the March '24 Release.

Transcript API Milestone 1

All the following Transcript API Milestone 1 features are now Generally Available:

- Data APIs (GET): Overview API, Detailed APIs, filters, multi-language support
- Request API (POST): Request training, Employee perspective
- Assign API (POST): Assign training, Manager and Learning Administrator perspective
- Remove API (PATCH): Remove training, bi-directional

Transcript API Milestone 2

All the following Transcript API Milestone 2 features are now Generally Available:

- Register API (PATCH): Register a training, Change an "Approved" learning record to "Registered"
- Progress API (PATCH): Change a "Registered" learning record to "In Progress"
- Complete API (PATCH): Complete a learning record
- Update API (PATCH): Update transcript data, Custom Fields, Form Fields, Due date

Transcript API Milestone 3

With this release, the Transcript API Milestone 3 supports the following features:

- Archive API: Archive a transcript record, Move an archived record back to its original state
- Approval API: Approve a training request, Deny a training request
- Withdraw API: Withdraw a user from a session they are registered for
- Exempt API: Exempt a transcript record

Implementation

The Transcript API Milestone 3 can be self-activated by the client administrator. Review the API documentation for new permissions, constraints, and scopes.

Learning - Training Capabilities

Content Skills Tagging - Portal Retagging

Prior to this enhancement, administrators required a work order to refresh skills tagged to content. This took time and required an additional expense from the customer. Additionally, trainings were copied without their associated skills when a copy-down was run from one environment to another.

With this enhancement, administrators can 'refresh' skills tagged to content via the configuration page with one click. Moving forward, except for when tagging a portal's catalog is in progress, there will never be a 'disabled' state on the Configuration page. After completing a database copy-down, customers can now easily rerun Content Skills Tagging and retag a catalog with skills without changing the configuration setting in the process. Additionally, this allows customers to 'refresh' skills tagged to content when troubleshooting is required or when new skill equivalencies are added.

To access the Configuration setting on the Content Skills Tagging page, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PREFERENCES > CONTENT SKILLS TAGGING > CONFIGURATION SETTING.

Before

After

How Does this Enhancement Benefit My Organization?

It provides a customer-facing method to rerun Content Skills Tagging while preserving the Configuration setting.

Considerations

- When tagging is initiated, the Content Skills Tagging Configuration page is disabled for 24 hours, while the catalog is tagged with skills.
- Currently, our Change Tracking process consistently operates to identify newly added and edited Learning Objects (LOs) in the Catalog, feeding them to our skills tagging algorithm.
  - However, in cases where skills are defined as equivalent to other skills after skills-tagging takes place, there was no mechanism for the equivalencies to be reflected on already-tagged Learning Objects.
  - This enhancement now provides a way to retag all LOs and have equivalent skills reflected on the entire catalog.

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
Capability Preferences - Manage	Grants the ability to create and edit expertise levels and rating scales for capabilities via Capabilities Preferences.	Core Administration

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

Edit Skills UI for Individual Learning Objects

Prior to this enhancement, managing skills on content was only possible through a bulk operation via Edge Import. Additionally, when an administrator viewed the Course Console, they could modify every field (that has 'write' permissions) except for 'Capabilities (Skills),' which was 'read-only.'

With this enhancement, the administrators can edit skills on a Learning Object (LO) directly from the Course Console. Tagging skills to trainings improves the discoverability of learning content. Feedback from interactions with skills within the flyout (such as adding or rejecting skills) improves the AI-powered skills detection algorithm.

The enhancement provides the following functionalities:

- Review auto-tagged skills and correct skills that were missed or mis-tagged.
- Search for skills or create custom skills and add them directly to the learning object.
- Add skills suggested by the Skills Graph.
- Reject skills from a learning object.
- View a skill's metadata, such as Capability ID, status, and description.

Before: Skills are only displayed (without editing)

After: Skills can be edited directly from Course Console

How Does this Enhancement Benefit My Organization?

This provides a method for administrators to manage individual skills tagged to learning objects (LOs) directly through the LMS user interface, improving the workflow for skills when managing LO metadata, which in turn, improves the discoverability of content.

Frequently Asked Questions (FAQs)

How will this make your customer's life significantly better?

We introduced the 'Capabilities (Skills)' field to the Course Console without an option to edit it. This resolves the gap of 'Capabilities (Skills)' being the only field on the Course Console that could not be edited. This feature complements the current solution of using Reporting 2.0 to review skills tagged to content and update the tagging via Edge Import. Editing skills on a single LO was previously a long, detailed, and time-consuming task for admins – this enhancement will save critical time in the admin workflow.

Will editing the skills on an auto-tagged LO help improve the skills detection algorithm?

Yes, customer corrections to the skills on an LO provide vital data to our data scientists to continuously improve the quality of the skills detection.

Implementation

This functionality is automatically enabled when Content Skills Tagging is enabled.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an **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
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
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

Skills Quick Start Wizard - Content Skills Tagging Added

If a customer neglects to enable Content Skills Tagging, they will miss out on important functionality like filtering a catalog search by Skills and getting "Related Learning" recommendations.

Start your skills strategy by making content tagging a critical part of your rollout. Cornerstone will automatically tag your learning content as part of your initial skills library set up in the Skills Quick Start Wizard, making it easier for your people to find the content they need to build the required skills. The Skills Quick Start Wizard makes it simple and easy for admins to get started with Skills in CSX. This enhancement introduces Content Skills Tagging to the recently improved onboarding experience, facilitating step-by-step navigation and focusing on the most important and often confusing configuration tasks.

The Skills Quick Start Wizard puts Content Skills Tagging enablement in the flow of Capabilities Onboarding, better ensuring that customers benefit from skills-based content recommendations. It also provides a detailed text that explains key concepts and best practices.

Before
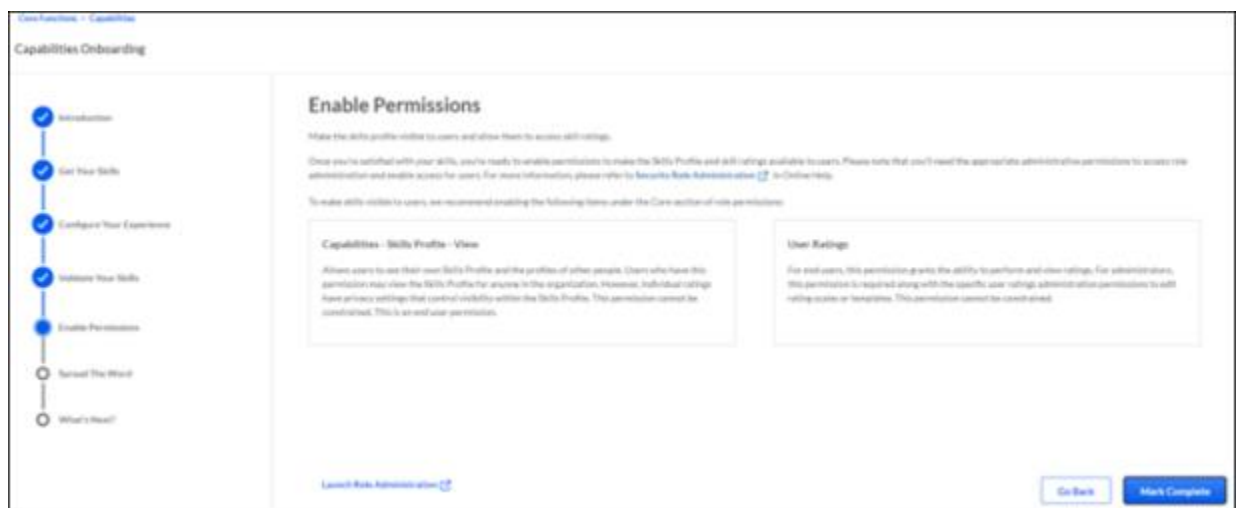
After
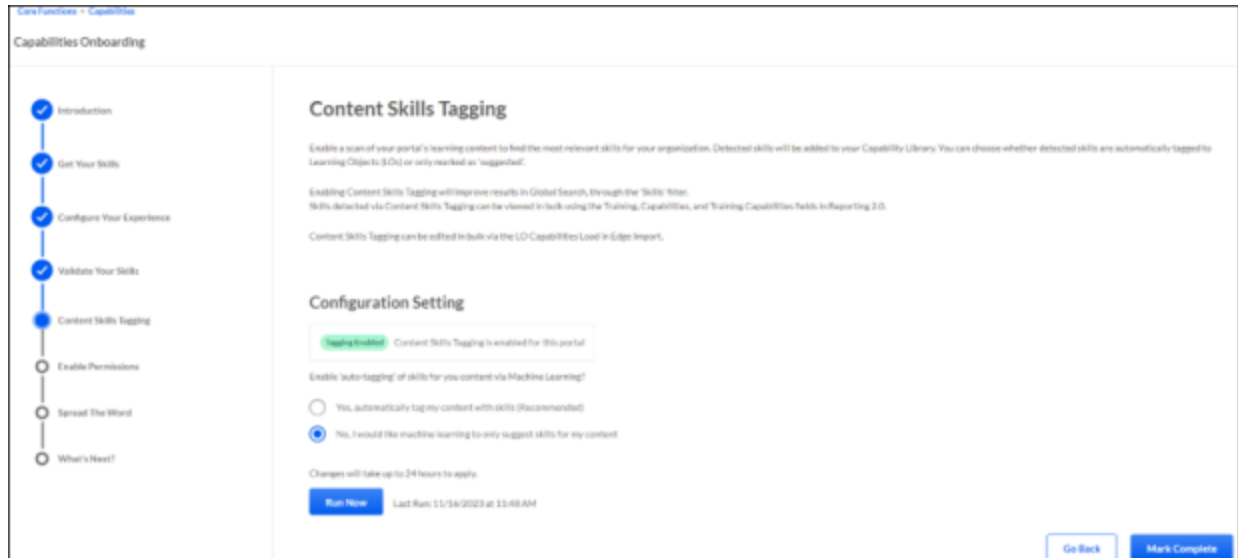
How Does this Enhancement Benefit My Organization?

The inclusion of the Content Skills Tagging Configuration page in the Wizard streamlines the process of enabling skills during onboarding in all areas of CSX, including Content.

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
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

Performance

Check-Ins

Check-Ins Outlook Calendar Invite Enhancements

With this release, the usability of Check-Ins is improved across multiple screens.

To use Outlook Calendar Invite functionality, it must be enabled. See *See Check-Ins - Outlook Calendar Integration.*

Mobile Device Enhancements

The following enhancements are available for Check-Ins mobile:

- Users can now send email invites to Check-Ins from their mobile devices for both series or individual meetings.
- Users can download series and individual calendar invites using their mobile devices.

Design Enhancements

The following design enhancements are now available in calendar invites features:

- The clock icon has been moved to the right side of the time picker to keep it consistent with the date picker.

- The date picker in a Check-In meeting now appears as a button and the pencil icon has been removed Selecting the button opens the edit individual meeting flyout.

  The date picker in a Check-In meeting will display the date, start time and end time. The day of the week has been removed.
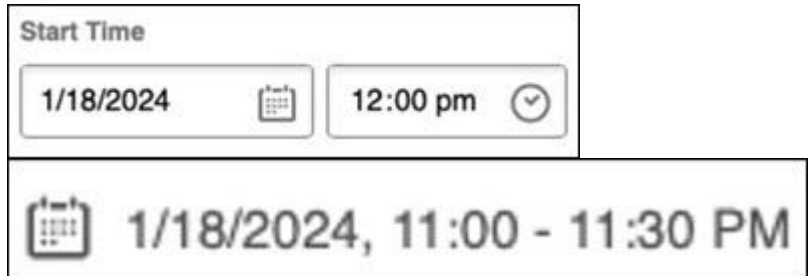
- Additional text has been added to the individual meeting modal to clarify that changes made in this flyout will only update this meeting occurrence.

- Additional text has been added to the series meeting editor to clarify that changes made here will affect the entire series.

- A Check-In participant can now view changes made to the tracked time zone using the Modification History page.
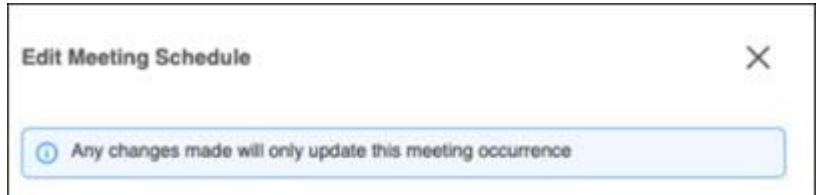
- If a Check-In meeting or Check-In series is deleted by a participant, a cancellation invite is automatically sent to the participants to remove the invite from their calendar.
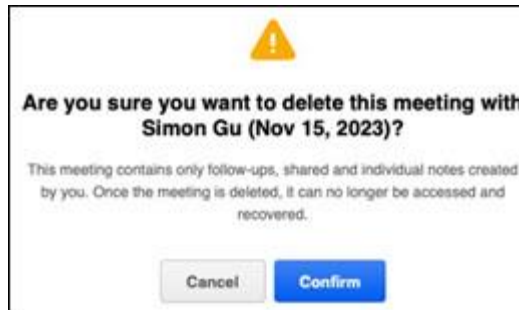
- To send a cancellation invite, a user must update the meeting in the Edit Meeting Schedule flyout. Once saved, a user can select "Cancel this meeting" to send a cancellation invite to the participants to remove the invite from their calendar .A cancellation invite is only sent if the user selected the email invite option.
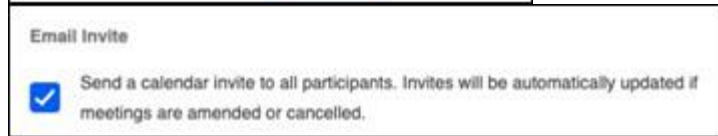
- To send a new calendar invite when a meeting has been reopened, a user must update the meeting in the Edit Meeting Schedule flyout. Once saved, a user can select "reopen" to send a new calendar invite to the participants to add this meeting to their calendar. An invite is only sent if the user selected the email invite option.
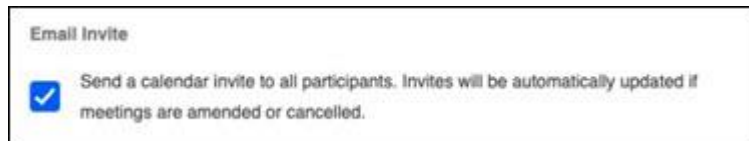
- If a user wants to view the timestamp of the previous invite within the Individual Meeting flyout, that information is now available on the Modification History page for the selected Check-Ins series.

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
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* | Performance |

	indirect subordinate cannot create a Check-In with their Detail Supervisor.	
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 Share With Me Enhancements

Prior to this enhancement, users were not able to view all of the Check-Ins shared with them in one centralized location.

With this enhancement:

- The new Check-Ins Shared with Me tab lets users review all Check-Ins Series shared with them in a single location.
- The new **Shared with** area is available for easy access to the Share flyout.
- Users can share archived Check-In series.

Users can also share Check-Ins series from their mobile devices.

To use this functionality, an administrator must enable it on the Check-Ins Settings page. To access, go to ADMIN > PERFORMANCE MANAGEMENT > CHECK-INS SETTINGS. Enable the Check-Ins View Permission option.

Share With Me Page

To access the Shared With Me tab, search for or select a series participant from the sidebar, then select the Check-In Series Name. The latest meeting in the check-in series opens.

Shared with

There are two ways to access the **Shared with** area to open the Share flyout:

- In the header of the Check-In series, select **Shared with** to open the Share flyout.

- On the User Profile page, select **Shared with** to open the Share flyout.

On the Share flyout, users can view, share, and delete participants.

All changes are visible on the Modification History page for Check-Ins. See *Check-Ins - Manage Settings.*

Share Archived

Users can now share archived Check-In meeting series without having to restore it first.
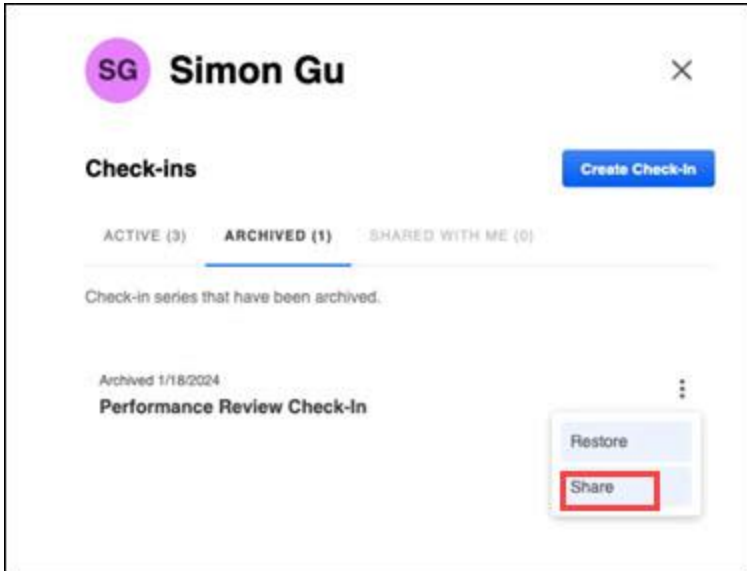
To share an archived meeting series, select the Archived tab for a participant. From the action menu, select **Share**.

Share from Mobile Devices

Meeting series participants can also share a Check-In series through their mobile devices. A series can be shared through the User profile and the Check-In series.
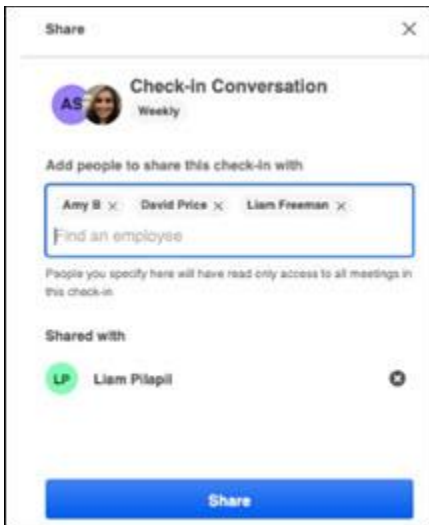
Considerations

Add any considerations or exceptions here, if available.

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
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

Check-Ins Usability Enhancements

With this enhancement, Check-Ins made several changes to improve usability.

Enable/Disable Personal Notes

Prior to this enhancement, the Personal Notes feature was enabled by default for all organizations. With this release, System administrators with the Check-Ins Settings - Manage permission can enable or disable Personal Notes.
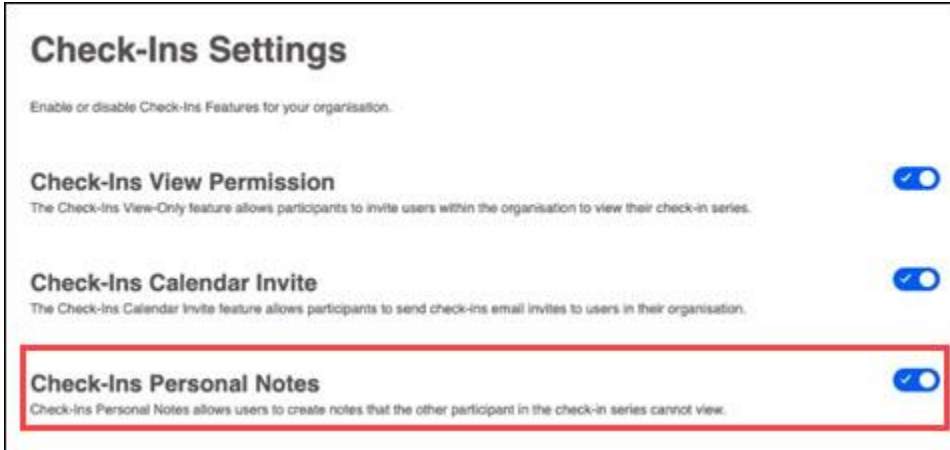
To access Check-Ins Settings, go to ADMIN > PERFORMANCE MANAGEMENT > CHECK-INS SETTINGS and enable Check-Ins Personal Notes.

Updated Empty State

On the Check-Ins Home Page, the notification feed's empty state has been revised to remove the duplicate **CREATE NEW CHECK-IN** button and display the message, "No Notifications. If you have any notifications, they will appear here."

Updated icons

- On the user's meeting topic page, the "Cancel this meeting" icon is updated to the standard close icon used across CSX products.
- For Notifications, the icon for the "You have not added any notes" notification is updated to be consistent with CSX design guidelines.
- All flyout panels now have an "X" icon to close the panel. The back icon (<) is removed.

View People Sidebar

Check-Ins provides two new enhancements for the People Sidebar.

Sidebar Visibility

Prior to this enhancement, the People sidebar is only visible if the user has active Check-Ins.

With this enhancement, the People sidebar is always visible, even if the user has no active Check-Ins.

Active Check-Ins

Prior to this enhancement, the People Sidebar displayed users filtered as follows:

- If there are more than five people on the People Sidebar, only Check-Ins with the participants modified in the last 31 days displayed.

- If there are 5 people or less on the People Sidebar, all Check-Ins with participants are displayed and the 'last modified within 31 days' rule did not apply.

With this enhancement, users can view anyone they have an active Check-In with so that they can easily access their active meeting series. People displayed are ordered by last date modified.

Export to PDF

Prior to this enhancement, users could download the meeting in PDF format by selecting "Download Meeting" in the Check-In Series dropdown.

With this release, to streamline options, this option has been renamed "Export to PDF."

Restore an Archived Series

With this release, participants of an archived check-in series can restore the series by selecting **RESTORE** at the top of the meeting topic page.
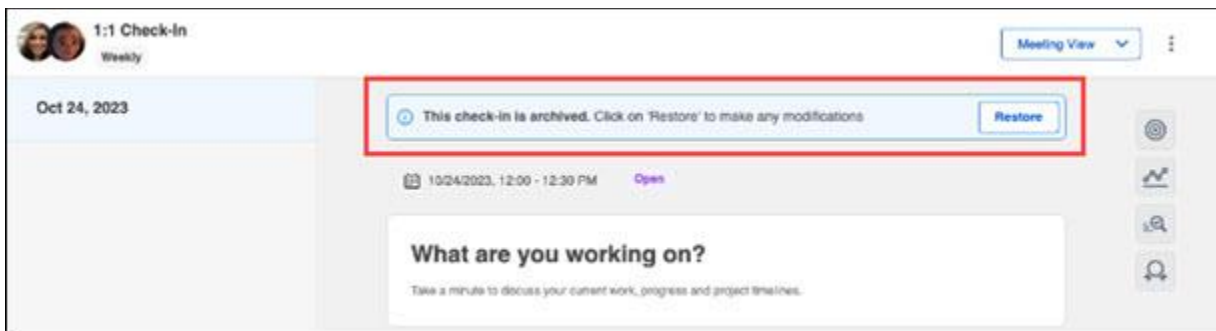
Archive a Series

Prior to this enhancement, a user could only archive a series through the user profile.

With this release, participants of an active check-in series can easily archive a check-in series by selecting **Archive** meeting view action menu.

Duplicate Series Notification

When attempting to a new check-in series with a participant who already has an existing series, the user will receive an alert letting them know that there is already an active Check-In with the selected user. Selecting **VIEW EXISTING SERIES** on this alert opens the user's profile to view all active and archived series or the user can continue creating the new series.

Goals and Development Plans

With this release, when a user selects a specific goal or development plan objective, a new screen opens that displays goal and development plan details.

To go back to the first screen, users can select the back icon (<) and to exit the panel, select the exit icon (X).

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
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

Compensation

Improved "Contact Administrator" Email in Compensation

Prior to this enhancement, email received by administrator did not show the Compensation task Name from which it was initiated, nor was it possible to know who sent it.

With this enhancement, email received by administrators is pre-populated with the Task Name and the full name and email address of the person who initiated the task.
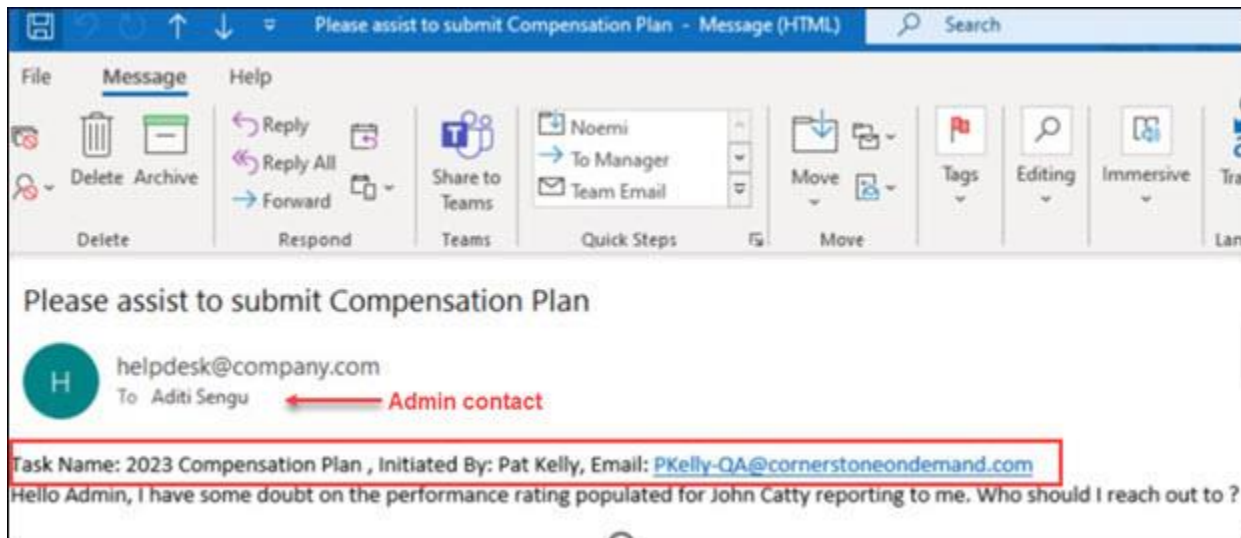
Considerations

This functionality only works:

- With email defined in the standard field "Email" in the user record. It does not observe what is defined in the "Personal email address" field.
- If the sender and Admin Contact both have an email address in standard field "Email" in the user record.

Implementation

This functionality is automatically enabled for all organizations using the 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	Compensation - Administration

	permission cannot be constrained. This is an administrator permission.	
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

Goals

Goals Redesign (Open Beta)

With this release, the redesigned Goals features provide end-users with a new intuitive interface that enables them to easily view, track, and manage their goals on the My Goals page.

To access the new Goals redesign, go to PERFORMANCE > TRY THE NEW GOALS.

My Goals Page
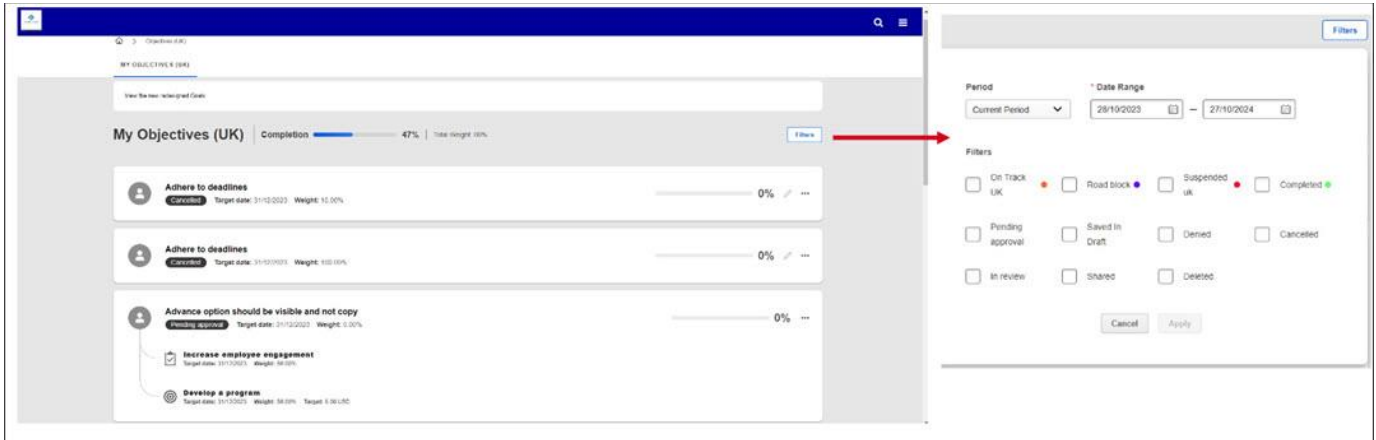
On the redesigned My Goals page, users can:

- View Tasks, Targets, overall completion progress, and weight percentage
- Apply filters to the change period display goals by status

Note: Division Goals and Manager Goals are no longer visible on the My Goals page.

Update Progress and Add Comment

By selecting edit icon, users can quickly update goals and add a comment.
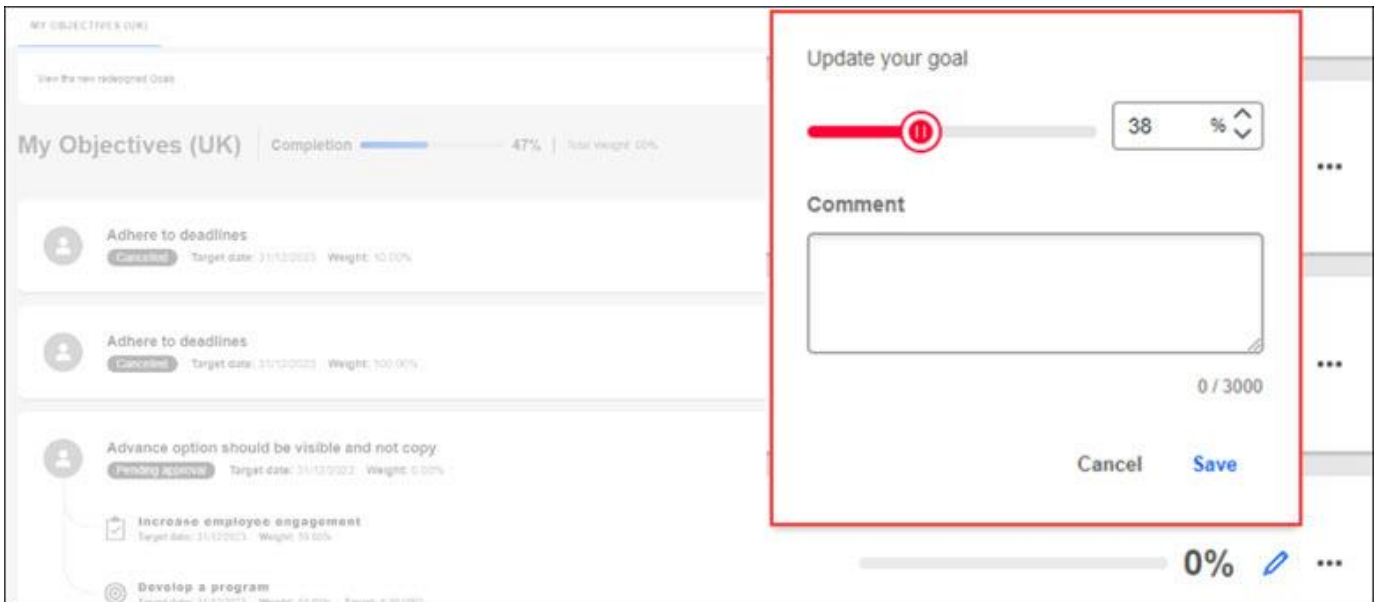
Update Status and Add Comment

By selecting the edit icon, users can quickly update goal status and add a comment.
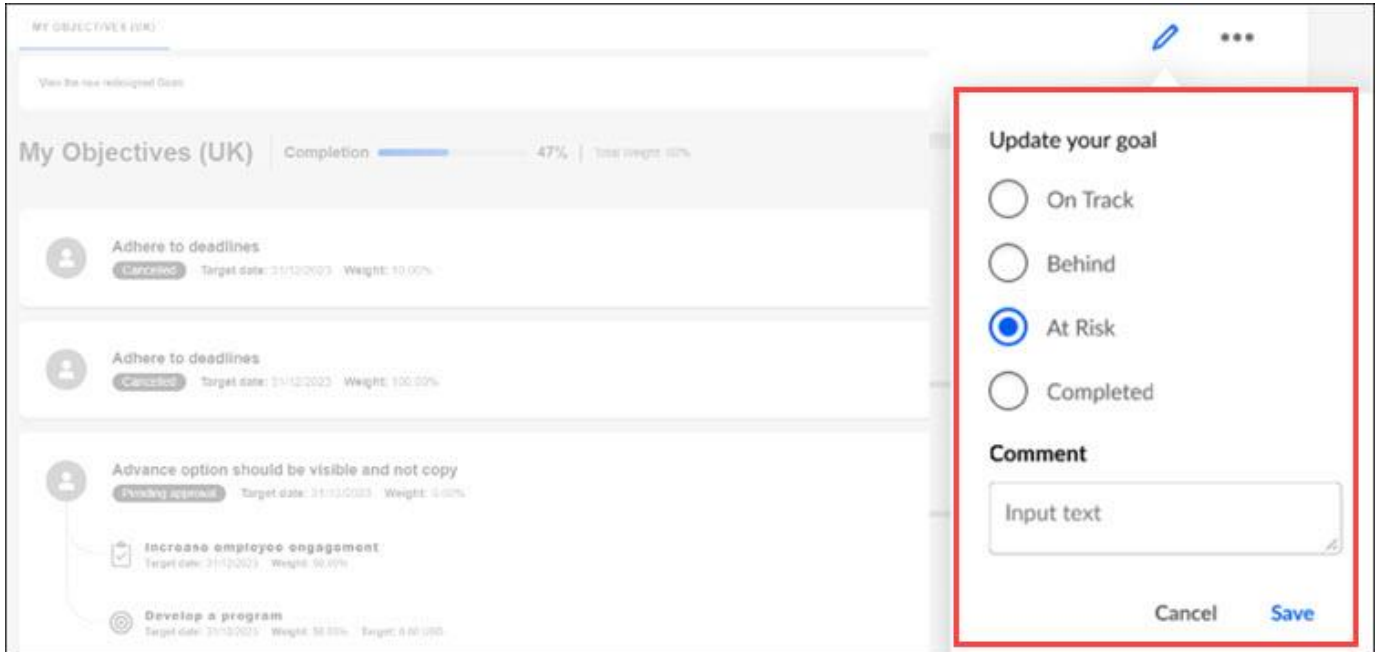
Cancel and Delete Goals

By selecting Cancel or Delete from the action menu, users can respectively cancel and delete goals and add a comment.
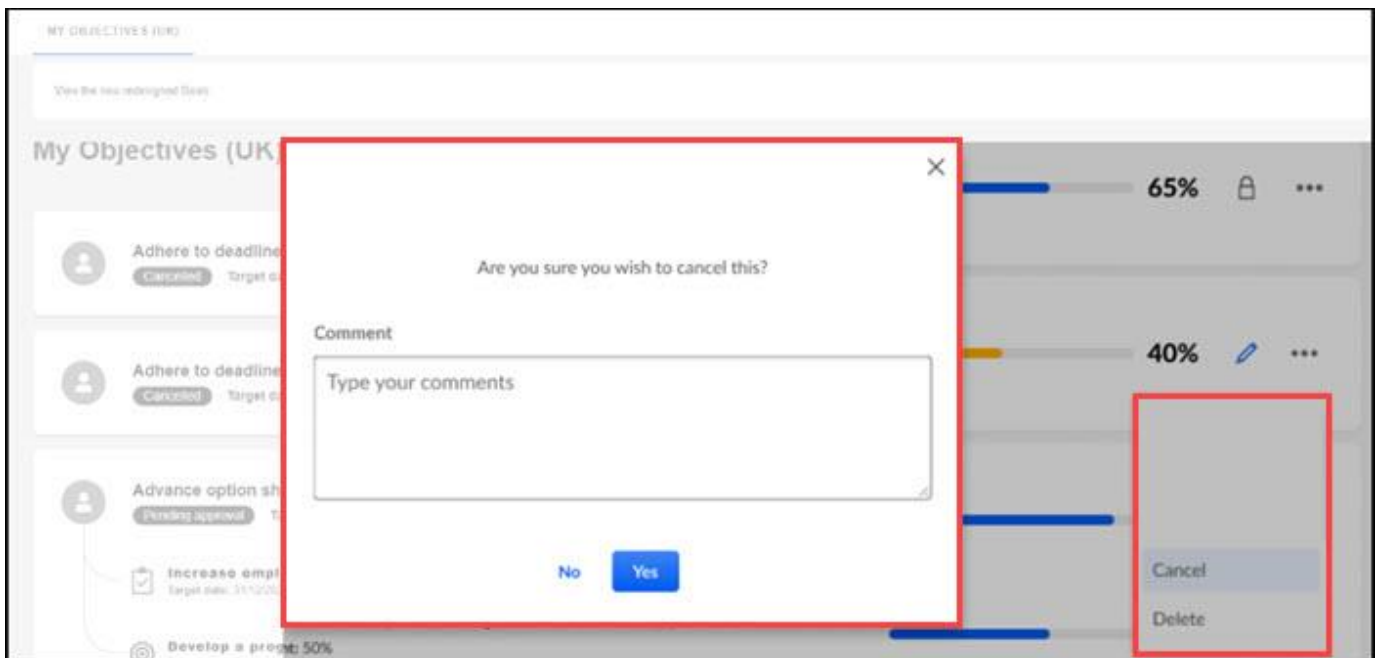
Implementation

- This functionality is available for all organizations using the Performance Goals module.

- Users cannot navigate between the current Goals user interface (UI) and the new Goals UI, but can open the new UI without overwriting the current UI.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Reviews

Equal Weighted Average Rating for Goals and Competencies in Review Tasks

With this enhancement, administrators can choose to calculate goals and competencies added in a review task based on equal weighted average.

To enable this option, go to ADMIN > TOOLS > PERFORMANCE MANAGEMENT > FORM SECTIONS. Search for and select the appropriate Goal Rating Section or Competency section. Select Edit for the appropriate form section. In the Competency Settings section or the Goal Settings section, under Settings, check **Enable Equal Weighted Average**.

Calculating Ratings

How the system calculate ratings if **Enable Equal Weighted Average** is enabled.

Formula for Calculation:	
Weighted Object Score	Each Object score / Max Section Score * Weight of each object
Avg Section Score	Sum of weighted object score for all objects present in the section
Overall Avg Section Score	(Avg Section Score/ Total Weight of all Object Weight) * 100
Overall Section Score	(Overall Avg Section Score/100) * Max Score of Section

Example:

User 1 has three defined goals for the Annual Performance Review and the ratings are:

Goal 1 – 2/5

Goal 2 – 3/5

Goal 3 – 3/5

The following applies:

Goals	Rating	Equally distributed weight (Up to 4 decimal precision)	Weighted Object Score	
G1	2/5	33.3333	13.3333	(2/5 * 33.3333)
G2	3/5	33.3333	20.0000	(3/5 * 33.3333)
G3	3/5	33.3334	20.0000	(3/5 * 33.3334)
Average Section Score			53.3333 (13.3333+20.0000+20.000)	
Overall Average Section Score			53.3333 (53.3333/100 * 100)	
Overall Section Score			2.6667 (53.3333/100 * 5)	
Overall Section Score (Rounded up to 2 decimal precision)			**2.67**	

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Form Sections - Manage	Grants ability to create and manage performance review questions and sections which are used in performance review tasks. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

Performance Reviews – Update Missing Reviewers

Prior to this enhancement, if a review step was paused because a reviewer was missing, the administrator had to submit a work order to update the missing reviewer.

With this enhancement, administrators can now self-update missing reviewers in a paused review step instead of submitting a work order during a review cycle. While the page primarily displays reviewers to be added for paused steps, it is not restricted to them. Even if a step is not paused, for example, when a co-planner is also assigned to the step, missing reviewers still appear on the page if they are available to update in the system. This functionality allows all instances where a reviewer is absent for an in-progress or overdue review step to be easily identified and addressed.

Administrators can now:

- Update reviewers for multiple reviewees or multiple review steps in a single review task.
- View all reviewee records with missing reviewers.

The updated reviewer step is automatically reopened for the new manager to resubmit with feedback. **Note:** The updated reviewer step will reopen automatically only if there is no other review step in the workflow in reopened status.

The step status is not changed to ensure the review cycle is not paused in case feedback from the new manager is not mandatory.

To access this functionality, go to ADMIN > TOOLS > PERFORMANCE MANAGEMENT> TASKS >. Select Update Reviewer from the Options menu.

Considerations

- This functionality is only applicable for records where a reviewer is missing. It cannot be used to change an existing reviewer.
- Missing Reviewers can only be updated if the review step is launched but could not be progressed due to an absence of a reviewer. It will not show records for a future step. This is because before the step launches, if the new reviewer is updated in system, it will automatically update the reviewer in the review step.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

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

Deprecation of Data Load Wizard (DLW) Requisition Template Load with the Q1 2025 Release

The ability to perform Requisition Template data loads using DLW will be deprecated with the Q1 '25 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 Edge Import as supported in DLW
- Allow update of Requisition Template through Edge Import 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 Edge Import for templates created from UI

Phase 3 - July '23 Release

Support Feeds for Requisition Template load in Edge Import

Phase 4 - November '24 Release

Support requisition status list upload through Edge Import

Final Phase - Q1 2025

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

2024

- Star Rating in Manage Candidates
- Expand Selection to 100 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.

Customers on SL4 environment cannot receive emails sent from Manage Candidates send email feature.

Manage Candidates

Manage Candidates Usability Enhancements

With this enhancement, the following changes are made on the Manage Candidates page to help recruiters quickly identify candidates and required actions:
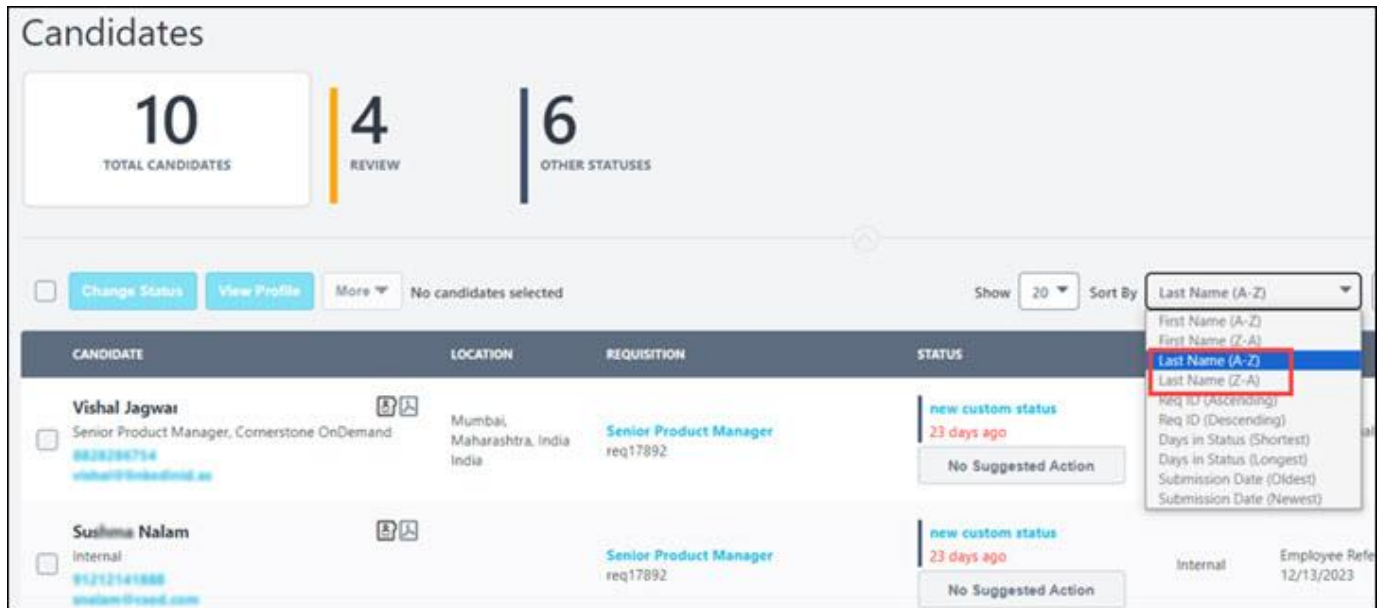
- Search for candidates by last name
- Sort disposition reasons in alphabetical order

Search for candidates by last name

Prior to this enhancement, candidates on the Manage Candidates page were only sortable by First Name, Requisition ID, Days in status, and submission date.

With this release, **Last Name (Z - A)** and **Last Name (A-Z)** options are now provided in the Sort By drop-down.

To access the Manage Candidates page, go to RECRUIT > MANAGE CANDIDATES.

The following sorting rules apply:

- Numbers will sort before letters.
- Special characters sort after Latin alphabet letters.
- The sorting preference is preserved when modifying filters on Manage Candidates.
- Upon leaving the page, the sorting preferences reset to sort by submission date.

Sort disposition reasons in alphabetical order

On the Change Status fly-out, in the dispositions drop-down, options are now sorted in alphabetical order to help requiters quickly locate the correct disposition reason.

To access the Change Status fly-out, go to RECRUIT > MANAGE CANDIDATES. Select a candidate and then select **CHANGE STATUS**.

Note: Only users with the appropriate permission can use the **CHANGE STATUS** button. If you don't have the appropriate permission, an error message appears.

The selected change also appears on the applicant profile.

The following rules apply:

- The list is sorted alphabetically based on the selected default language.
- Numbers are shown before letters.

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

Permissions
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

Candidate Skills Match Enhancements (EA)

With this enhancement, recruiters can:

- Apply filters to the Matching Score column on the Manage Candidates page.
- Review relevant previous work experience with parsing disabled.
- Enable/disable matching score calculations at requisition level.

To use Candidate Skills Match, you must enable it. *See Enable Candidate Skills Match.*

To access the Manage Candidates page, go to RECRUIT > MANAGE CANDIDATES.

Matching Score filters

Prior to this release, there was no way to filter the matching score to determine the top matches.

With this release, recruiters can now select one or more Matching Score filters to identify the best matched applicants.

Parsing dependency removed

Prior to this release, for better scoring, customers had to enable parsing to display previous work experience.

With this release, on the Skills Matching Summary flyout, customers can now see relevant matching scores and previous work history details, even when work experience parsing is disabled for a requisition. The system parses automatically and displays system identified work experience.

Note: When work experience parsing is disabled for a requisition, automatic detection of work experience is done only for applications submitted through a resume.

Enable/disable matching score calculations

With this release, customers can now enable matching score calculations on a requisition by selecting the new **Calculate Candidate Matching Score** checkbox. Unchecking disables this functionality.

Note: Matching scores are calculated only if this checkbox is checked and **Enable Candidate Skills Match** is enabled for the primary location OU of the requisition. To enable candidate skills match, go to ADMIN > RECRUIT > COMPLIANCE ENABLEMENT

You can access the Requisition section as follows:

- When adding a new requisition - Go to RECRUIT > MANAGE REQUISITIONS. Click the Options drop-down, and select Add Requisition.
- When editing a job requisition - Go to RECRUIT > MANAGE REQUISITIONS. On the Manage Requisition page, select the appropriate item in the Job column to open the Edit Requisition page.

Considerations

- Customers who have open requisitions in Location Organizational Units (OUs) where Candidate Skills Match is enabled, will have the Calculate Candidate Matching Score configuration enabled for those requisitions on deployment so that they continue to get Matching score for applications.
- Matching Score filter will NOT be visible to customers who have Candidate skills match prior to the January 12th patch. The matching score is still calculated, but the filter won't be visible. To view matching score filter, impacted customers can disable and then re enable the candidate skills match feature by going to ADMIN > RECRUIT > FEATURE ACTIVATION. Reenablement will NOT impact their existing score data.

Implementation

This functionality is automatically enabled for all organizations using Candidate Skills Match functionality.

Permissions

The following existing permissions apply 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
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*	Recruiting

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.*

Unified Experience for the Hiring Team on Manage Candidates

Prior to this enhancement, only certain users with appropriate permissions had access to the Manage Candidates page.

With this enhancement, Hiring Managers and Reviewers now have access to the Manage Candidates page which provides a unified, modern, and simplified candidate review experience.

The following changes now apply:

- Updates to the following pages now provides direct access to the Manage Candidates page:
    - Hiring Dashboard
    - Recruiting Dashboard
    - Review Applicants page
    - Manage Requisitions page
- New managing flag rules
- Changes to the Email candidate functionality
- Changes to the Hiring Manager Shortlist

Direct access to the Manage Candidates page

The following pages are updated to allow direct access to the Manage Candidates page.

Hiring Dashboard

The Hiring Dashboard now opens to the Manage Candidates page as follows:
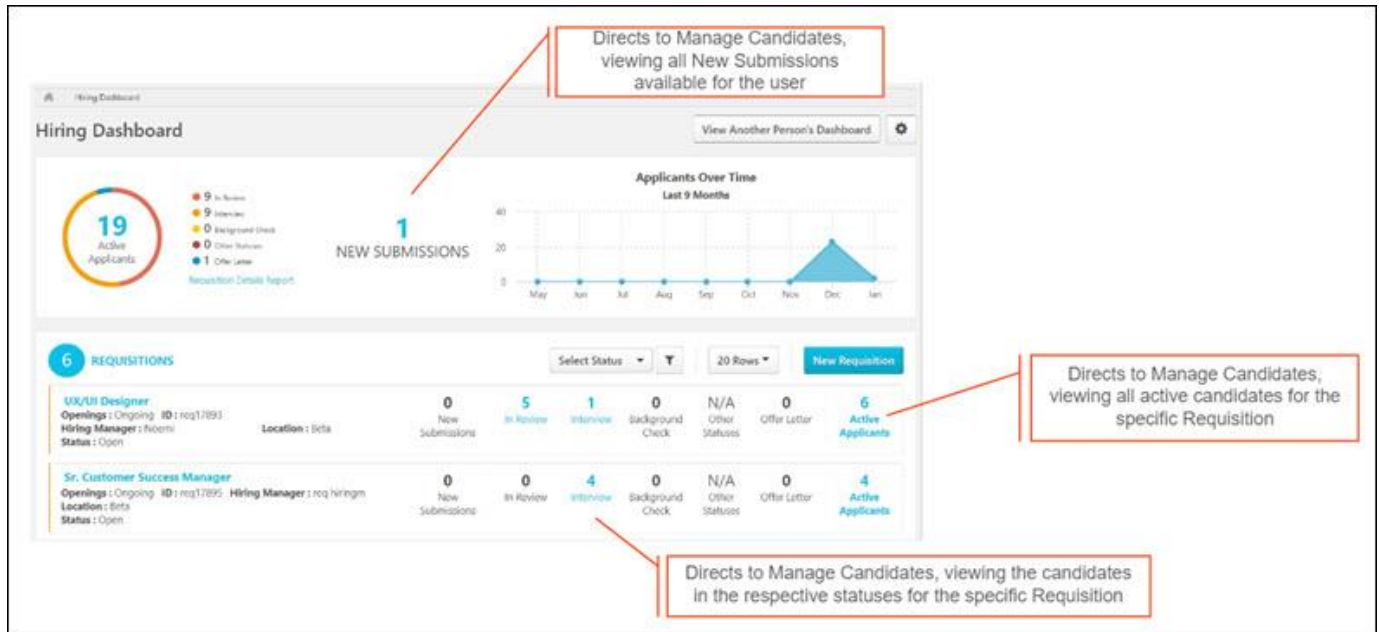
To access the Hiring Dashboard, go to RECRUIT > HIRING DASHBOARD.

The New Submissions link is only available for:

- Requisition owners.
- Users with the Manage Requisition permission if the requisition is within their constraint.

When viewing another person's dashboard, these links are not active.

Recruiting Dashboard

The Recruiting Dashboard now opens to the Manage Candidates page to view as follows:

To access the Recruiting Dashboard, go to RECRUIT > RECRUITER DASHBOARD.

Review Applicants page

The Review Applicants page now opens to the Manage Candidates page as follows:

To access the Review Applicants page, go to RECRUIT > REVIEW APPLICANTS.

Manage Requisitions page

The Manage Requisitions page now opens to the Manage Candidates page as follows:

Note that Manage Requisitions page is by design targeted at Recruiters.

To access the Manage Requisitions page, go to RECRUIT > MANAGE REQUISITION.

New Managing Flag Rules

Prior to this release, a user accessing Manage Candidates had the ability to add any applicant or application flags regardless of the flag role-based configuration.

With this release, new rules and logic apply for application flag visibility as follows:

- The user viewing the candidate can only see and manage flags if **Ability to view** is checked for their role.
- When managing flags in bulk, if a user assigns a flag they are not allowed to assign to all of the selected candidates, a message displays to let them know that the flag will not be added for those specific candidates.
- The role-based visibility only applies to application flags, not to applicant flags.

Note: To manage candidate flags, the Applicants: Manage Flags permission is required.

To access the Edit Visibility page, go to ADMIN > TOOLS > RECRUIT > APPLICANT FLAGS. Select the Edit option in the Options column of the Flags table.

Email Candidate functionality

Prior to this release, a user could use the "Email candidate" functionality for all candidates they had access to in Manage Candidates.

With this release, the following now applies:

- Only Primary owners and Owners can send emails to candidates for their requisitions.
- Other users can send emails from Manage Candidates if they have the *Applicants: Send email from Manage Candidate* permission. This permission cannot be constrained. Once assigned, the user with the permission will be able to send email to all candidates they have access to from Manage Candidates.
- If a user tries to bulk send an email to multiple candidates, for candidates that they are not authorized to send email to, the send email flyout opens to display an error message that lists the excluded candidate

Hiring Manager Shortlist changes

Prior to this release, the Hiring Manager Shortlist legacy functionality constrained the visibility of hiring managers and candidates to "In Review" status. With this release, this still applies, but hiring managers and reviewers will not be able to access Manage Candidates.

Customers who have the Hiring Manager Shortlist enabled must also have the *Applicants: Send email from Manage Candidate* permission to use this functionality.

Considerations

For Manage Candidates, the star rating of candidates is not yet available.

Implementation

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

Transitioning to Manage Candidates and Deprecating Manage Applicants

As we complete this important milestone of offering a unified and modernized experience to the entire hiring team on Manage Candidates, we understand that this may have an impact on your enablement and training materials.

If this deprecation is representing a major challenge in your operations, please contact your Client Success Manager or the Client Support Team. We kindly ask you to provide an explanation why you require an extension of Manage Applicants so that we ensure we are aware of all situations – and we will make sure you can continue using Manage Applicants until July 2024.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This	Recruiting

	permission can be constrained by OU, User's OU, and Grade.	
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
Email Digest Administration - Manage	Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission.	Performance - Administration

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Send email from Manage Candidates	Grants the ability to send emails to all candidates the user has access to from Manage Candidates. This permission cannot be constrained.	Recruiting

Email on Manage Candidates – Requisition and Application Custom Fields

With this enhancement, recruiters can add requisition and application custom fields to the email they send from Manage Candidates.
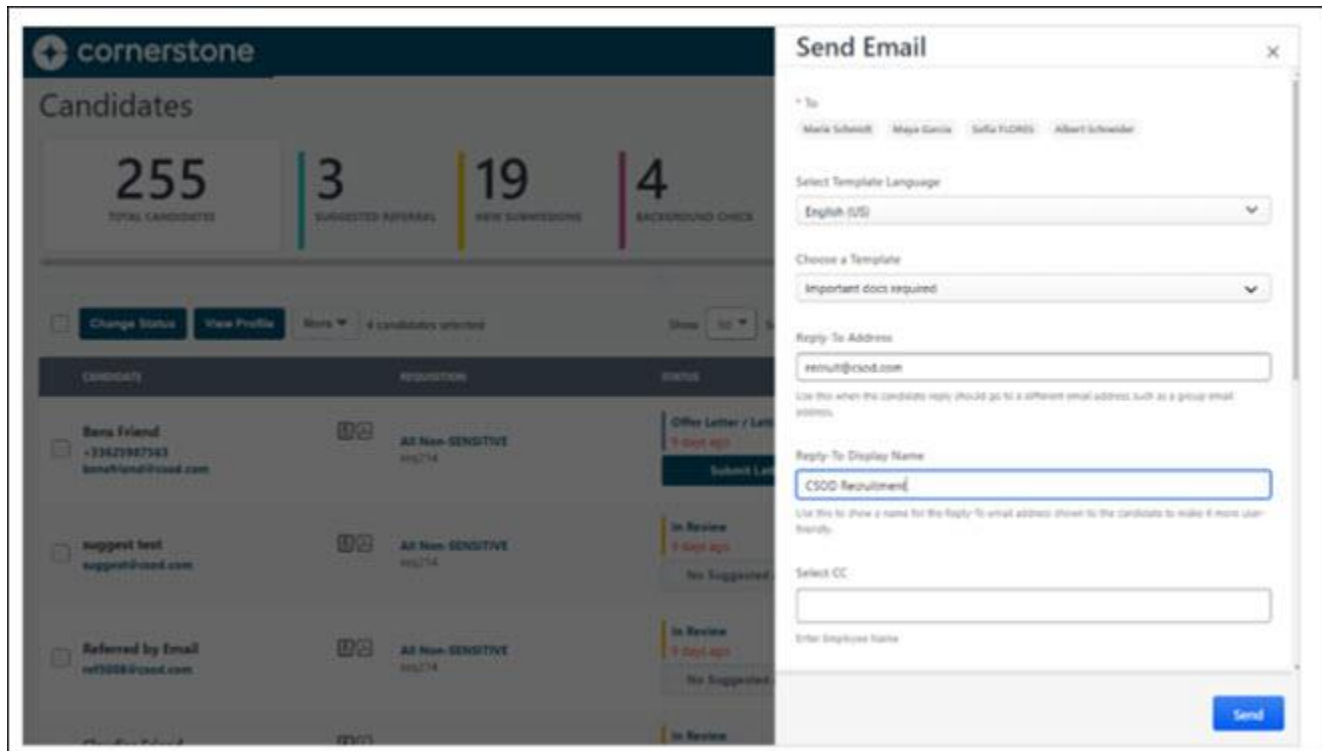
How Does this Enhancement Benefit My Organization?

Recruiters will be able to add much more context to the emails they send to candidates, including customer-specific requisition and application details.

Add Custom Fields to Email Templates

Administrators can edit existing templates or create new templates that include requisition and/or application custom fields.

To access this functionality, go to ADMIN > TOOLS > RECRUIT > EMAIL TEMPLATES.

Select the **View tags** link to display requisitions and application custom fields in alphabetical order. Only tags for custom fields that are available for the user creating or editing the template show in the list.

Note: These tags can be used in "Candidates Email". They are not available for job alerts.

When editing a template containing tags outside of their availability, users can still see them displayed in the email body. If the tag is removed from the text, users will not be able to find them again in the list of tags using the **View Tags** link.
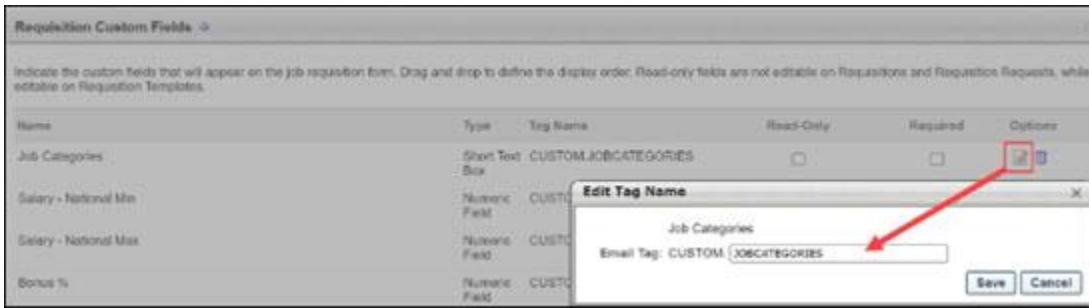
Add Custom Fields to Email on Manage Candidates Page

Recruiters can edit or send an email to one or many candidates using a template a blank email.

To access this functionality, go to RECRUIT > MANAGE CANDIDATES.

Select the **View tags** link to display the requisitions and application custom fields listed alphabetically.

Available Custom Fields

Only the custom fields that meet all of the requirements listed below appear on the list of tags in the template and email:

- Requisition and Application custom fields.
- Custom field configuration where the custom field is active and available to the user creating the template or email. (ADMIN > TOOLS > CORE FUNCTIONS > CUSTOM FIELDS ADMINISTRATION).
- Custom field configuration in Recruiting where the custom field is added to the list of fields and a tag is attached to the custom field. (ADMIN > TOOLS > RECRUIT > REQUISITION AND APPLICANT PREFERENCES)

It is not possible to see a custom field in the list of tags, if this custom field is not in your availability. Users can use a template containing a tag outside of their availability. To ensure that users can always control what information is sent to candidates, they can see the custom field value in the preview.

Considerations

This enhancement does not cover applicant custom fields.

Implementation

- This functionality is automatically enabled for all organizations using the Recruiting module.
- If you are still using custom emails or email from template (which are available on the applicant profile), consider transitioning to Email from Manage Candidates which offers more functionalities and a better experience.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. *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
Email Digest Administration - Manage	Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission.	Performance - Administration

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Send email from Manage Candidates	Grants the ability to send emails to all candidates the user has access to from Manage Candidates. This permission cannot be constrained.	Recruiting

Interview Scheduler Enhancements to the Paradox Integration

With the Paradox interview scheduler integration, recruiters can use the Manage Candidates page to easily automate the scheduling/rescheduling of interviews. Paradox offers native integrations to calendar and virtual meeting tools which can be leveraged in the context of this integration.
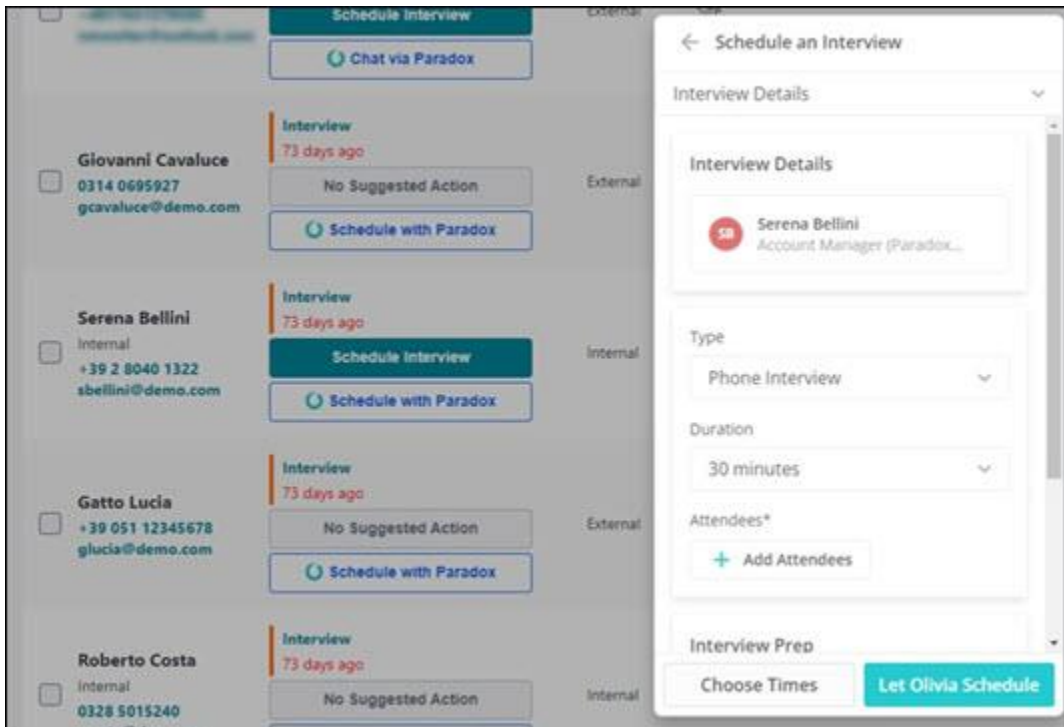
The key features for this integration are as follows:

- Schedule/reschedule/cancel interviews
- Integrate with calendar and virtual meeting tools
- Commuicate with candidates through several methods, including email, SMS, Whatsapp
- Chat with candidates

Enhancements

- Ability to configure the integration in Edge
- Automatic deletion of candidates in Paradox upon anonymization in Cornerstone
- Cancellation of interviews for closed candidates

Starter Guide

Click here to view the Paradox Interview Scheduler Integration Starter Guide.

Candidate Skills Match Enhancements (EA)

With this enhancement, recruiters can:

- Apply filters to the Matching Score column on the Manage Candidates page.
- Review relevant previous work experience with parsing disabled.
- Enable/disable matching score calculations at requisition level.

To use Candidate Skills Match, you must enable it. *See Enable Candidate Skills Match.*

To access the Manage Candidates page, go to RECRUIT > MANAGE CANDIDATES.

Matching Score filters

Prior to this release, there was no way to filter the matching score to determine the top matches.

With this release, recruiters can now select one or more Matching Score filters to identify the best matched applicants.

Parsing dependency removed

Prior to this release, for better scoring, customers had to enable parsing to display previous work experience.

With this release, on the Skills Matching Summary flyout, customers can now see relevant matching scores and previous work history details, even when work experience parsing is disabled for a requisition. The system parses automatically and displays system identified work experience.

Note: When work experience parsing is disabled for a requisition, automatic detection of work experience is done only for applications submitted through a resume.

Enable/disable matching score calculations

With this release, customers can now enable matching score calculations on a requisition by selecting the new **Calculate Candidate Matching Score** checkbox. Unchecking disables this functionality.

Note: Matching scores are calculated only if this checkbox is checked and **Enable Candidate Skills Match** is enabled for the primary location OU of the requisition. To enable candidate skills match, go to ADMIN > RECRUIT > COMPLIANCE ENABLEMENT

You can access the Requisition section as follows:

- When adding a new requisition - Go to RECRUIT > MANAGE REQUISITIONS. Click the Options drop-down, and select Add Requisition.
- When editing a job requisition - Go to RECRUIT > MANAGE REQUISITIONS. On the Manage Requisition page, select the appropriate item in the Job column to open the Edit Requisition page.

Considerations

- Customers who have open requisitions in Location Organizational Units (OUs) where Candidate Skills Match is enabled, will have the Calculate Candidate Matching Score configuration enabled for those requisitions on deployment so that they continue to get Matching score for applications.
- Matching Score filter will NOT be visible to customers who have Candidate skills match prior to the January 12th patch. The matching score is still calculated, but the filter won't be visible. To view matching score filter, impacted customers can disable and then re enable the candidate skills match feature by going to ADMIN > RECRUIT > FEATURE ACTIVATION. Reenablement will NOT impact their existing score data.

Implementation

This functionality is automatically enabled for all organizations using Candidate Skills Match functionality.

Permissions

The following existing permissions apply 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
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	Recruiting

requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained.

Note: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*

Comments on Requisitions

Prior to this enhancement, recruiters were unable to record status updates on their requisitions.

With this enhancement, on the Manage Requisitions page, recruiters with appropriate permissions can view and create comments for the selected requisitions.

To access the Manage Requisitions page, go to RECRUIT > MANAGE REQUISITION.

To add a requisition comment, in the Action drop-down, select **Comments**. The Comments page opens.
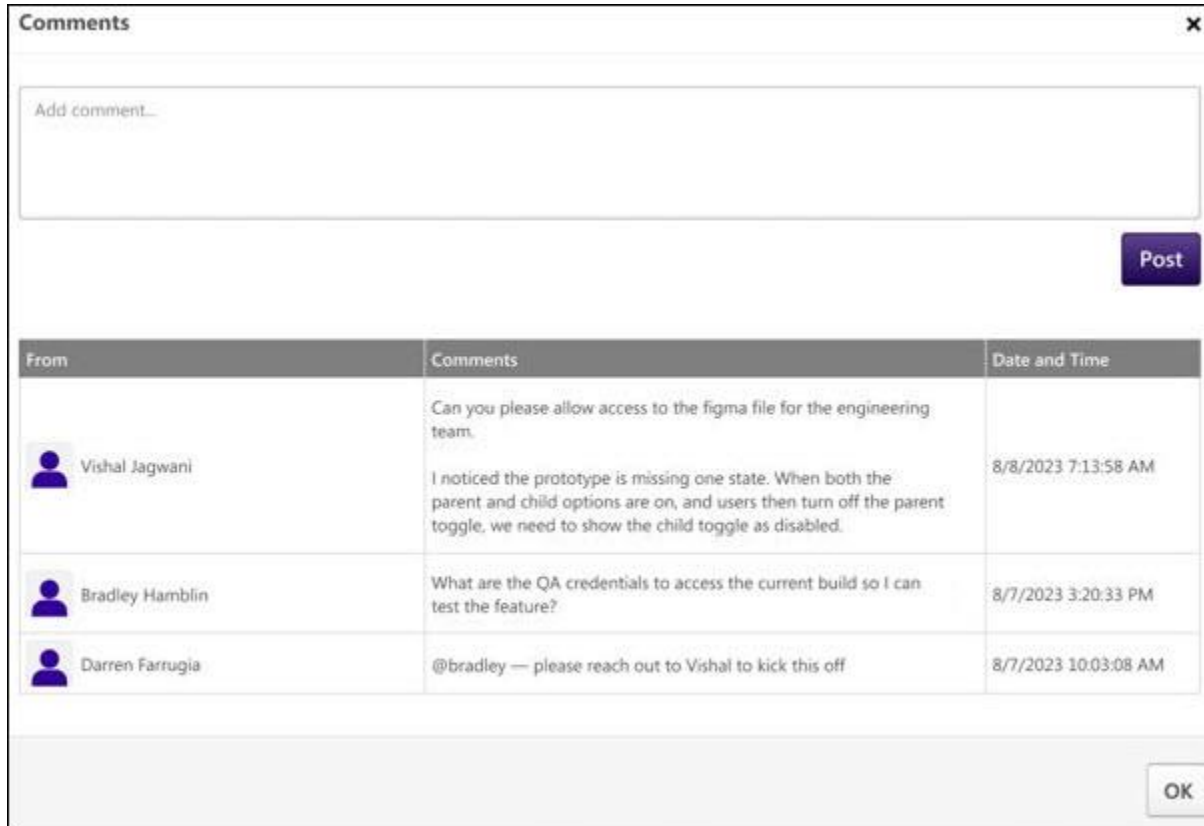
Type comments in the Comments box and select **POST**. Comments cannot exceed 1000 characters.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This	Recruiting

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

	Note: This is a dynamically assigned permission that is not available in Security Role Administration. Once a user is scheduled as an interviewer for an applicant, the user will always have permission to view the interview details on the Interview Manager page. Users with this permission can do the following:	
	• *Access the Interview Manager page.*	
	• *View the resume and cover letter for applicants for whom they are an interviewer.*	
	• *View the applicant profile for applicants for whom they are an interviewer.*	
	• *View the interview guide for the requisition for which they are listed as an interviewer.*	
	• *Recommend that an applicant be advanced or not advanced.*	

Note: Requisition owners who do not have the permission necessary to manage requisitions can only manage a job requisition for which they are an owner. The permission to review or approve a job requisition grants users view access to the requisition. *Note: The requisition displays on the owner's My Jobs tab on the Manage Job Requisitions page. Owners do not have permission to create new job requisitions.*
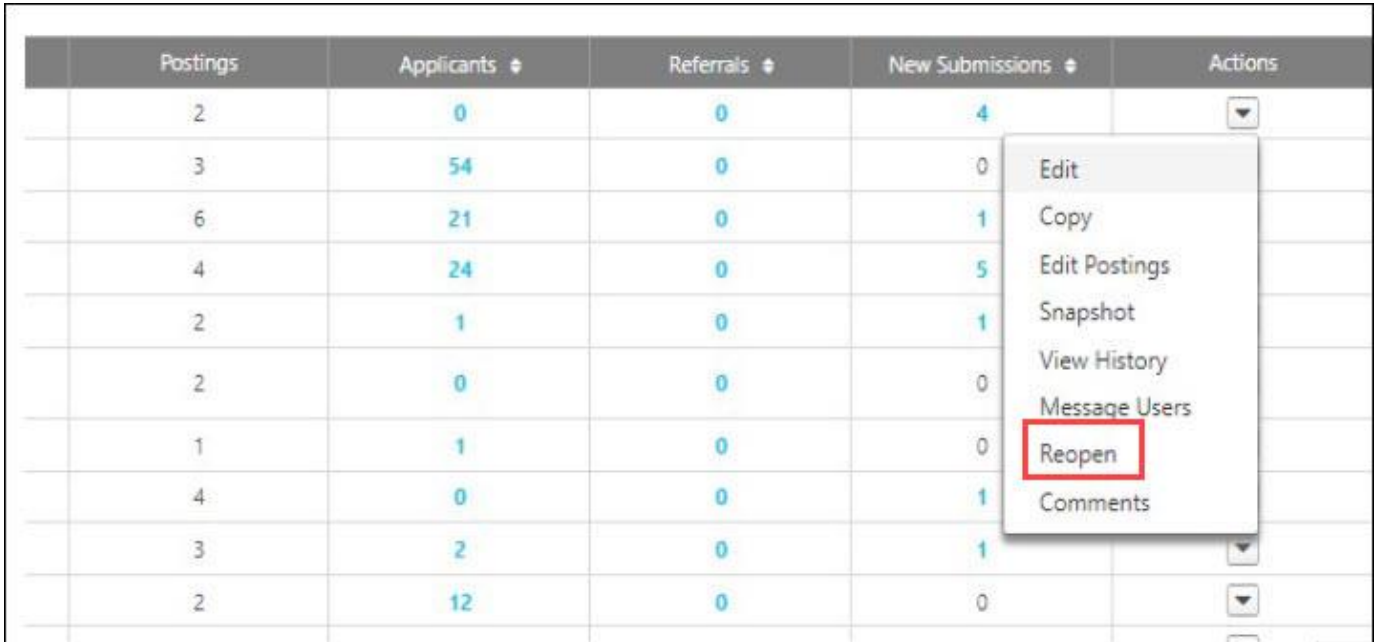
Reopen Closed/Cancelled Requisitions

Prior to this enhancement, recruiters were unable to take action on a requisition they closed by mistake.

With this enhancement, on the Manage Requisitions page, recruiters with the Requisition: Reopen permission can reopen a closed or cancelled requisition to make changes.

To access the Manage Requisitions page, go to RECRUIT > MANAGE REQUISITION.

To reopen a requisitions, in the Action drop-down, select **Reopen**. This option is only visible if the requisition is closed or cancelled.

Once reopened, the status on the Managed Requisition page changes to Open and this change is displayed in the Requisition History. *See Requisition History Pop-up.*

Considerations

- Once reopened a requisition does not go through any approval workflow.
- If a requisition is edited, it will go through approval workflows.
- The **Days Open** field doesn't consider the number of days a requisition was in closed or canceled status. For example, if requisition was open for five days, then closed on 6th day and then again reopened on the 10th day, Days Open will still show 10 days in the User Interface (UI) and in Reporting.
- If a requisition goes to Cancelled status from Pending for Approval status and is subsequently Reopened status from the Manage Requisition page, it will move to Open status, skipping the Approval workflow. This workflow is targeted to be addressed in a later release.

Implementation

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Reopen	Grants ability to reopen closed or cancelled requisitions and make changes. This permission can be constrained by OU, User's OU, and Grade.	Recruiting

The following existing permissions apply to this functionality:

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

	a reviewer, the permission is revoked for the associated requisition. This permission cannot be manually assigned. ***Note:*** *If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the* **Requisition: Reviewer** *permission is revoked for the associated requisition. However, if the reviewer was also added as a reviewer via the General tab when creating, editing, or copying the requisition, the reviewer still appears on the In Review panel as a duplicate reviewer and retains access to the requisition and applicants from the* **Requisition: Reviewer** *permission. See* **Applicant Profile Page Overview** *for more information about duplicate reviewer instances.*	
Requisition: Interviewer	Grants ability to access and view past and future interviews and record interviewee recommendations. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. Once a user is scheduled as an interviewer for an applicant, the user will always have permission to view the interview details on the Interview Manager page. Users with this permission can do the following:* • *Access the Interview Manager page.* • *View the resume and cover letter for applicants for whom they are an interviewer.* • *View the applicant profile for applicants for whom they are an interviewer.* • *View the interview guide for the requisition for which they are listed as an interviewer.* • *Recommend that an applicant be advanced or not advanced.*	Recruiting

Note: Requisition owners who do not have the permission necessary to manage requisitions can only manage a job requisition for which they are an owner. The permission to review or approve a job requisition grants users view access to the requisition. ***Note:*** *The requisition displays on the owner's My Jobs tab on the Manage Job Requisitions page. Owners do not have permission to create new job requisitions.*

Share on LinkedIn from Internal Career Site

Prior to this enhancement, internal employees were unable to post internal job listings on LinkedIn.

With this enhancement, internal employees can post jobs on LinkedIn and receive their company's referral credits.

To enable this functionality, administrators can go to ADMIN > RECRUIT > INTERNAL CAREER SITE and select a Division. Select the General Settings tab and enable the **Enable Referrals** and the **Share on LinkedIn** toggles.

Once enabled, a **SHARE ON LINKEDIN** button appears on the Internal Career site.

Additionally, users with appropriate permissions can now see the details of jobs posted on the Internal Career Site.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Internal Career Site	Enables users to view the internal career site. Assigned by default to the default security role, System Administrator, Cornerstone Administrator, and the Recruiting Administrator.	Recruiting
Career Center - View	Enables users to view the Career Center, including Career Pathing and Job Search, depending on enabled components and preferences. This permission enables users to view the Internal Job Search widget on the Welcome Page and custom pages. This permission is also required to post a requisition to an internal career site. This is an end user permission.	Talent/Succession