

## CSX Learning Release Notes

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# Learning

# Ability to Reset Client ID and Secret for Webex Control Hub

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

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

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

To reset Client ID and secret key:

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



**Webex Control Hub Settings**

How to set up your Webex Control hub integration

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

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

**Client ID:**

**Client Secret:**

## Implementation

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

# Accessibility Enhancements - March 2023

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

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

## Color Contrast and Visual Cue Improvements

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

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

## Improvements for Screen Readers

The following improvements have been made for screen readers:

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

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

## Improvements to Keyboard Navigation and Browser Focus

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

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

## How Does this Enhancement Benefit My Organization?

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

## Implementation

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

# Certifications - Dynamic Re-Enrollment

## Certifications - Dynamic Re-Enrollment

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

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

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

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

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

### How Does this Enhancement Benefit My Organization?

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

### Consideration - CSV Files of Users

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

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

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

### Consideration - Overlapping Dynamic Proxy Enrollments

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



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

## Consideration - Dynamic Removal Logic

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

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

## Frequently Asked Questions (FAQs)

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

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

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

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

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

No, this permission cannot be constrained.

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

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

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

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

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

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

## Implementation

This functionality is automatically enabled for all organizations using Certifications.

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

## Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Proxy Enrollment for Certification - Dynamic Re-enrollment	Grants access to view and update the Dynamic Re-enroll toggle for certifications on the Proxy Enrollment page. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Proxy Enrollment for Certification - Create Dynamic	Grants administrator ability to create dynamic proxy enrollments for certifications. This is an administrator permission.	Learning - Administration
Proxy Enrollment for Certification – Remove Dynamic	Grants administrator ability to create a proxy enrollment for certifications in which users are dynamically removed. This is an administrator permission.	Learning - Administration

## Security Roles

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

## Proxy Enrollment Administration - Dynamic Re-Enroll

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

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

The following new filters are available:

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

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

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Proxy Enrollment for Certification - Create Dynamic	Grants administrator ability to create dynamic proxy enrollments for certifications. This is an administrator permission.	Learning - Administration
Proxy Enrollment for Certification – Remove Dynamic	Grants administrator ability to create a proxy enrollment for certifications in which users are dynamically removed. This is an administrator permission.	Learning - Administration

## Before

### Proxy Enrollment

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

[Proxy Enrollment for Certification](#)

**Keyword:**

**Request Date:** This Week From: 5/8/2011 To: 5/14/2011 Search (2 Results)

Certification

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

## After

### Proxy Enrollment

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

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

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

Search Training Title Search

Add New

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

## Proxy Enrollment Details

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

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

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

### Before

#### Safety General

**Safety General**

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

#### SELECTION CRITERIA

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

(4 Results)

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

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## After

### Proxy Enrollment Details (Dynamic)

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

Proxy ID <b>282</b>	Title <b>General Safety</b>	Assignment Date <b>12/9/2022 3:10 PM</b>	Request Type <b>Assign &amp; Approve Certification - Item is not registered</b>
Selection Criteria <a href="#">View</a>	Requested By <b>Tatu, Debbie</b>	Status <b>Processed</b>	Requested Date <b>12/9/2022 3:10 PM</b>

#### Proxy History

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

Showing 1-2 of 2

#### Modification History



## Proxy User History Details

### Proxy User History Details ✕

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

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

## Audit Enhancements - Modification and Approval History

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

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

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

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

## Proxy ID Values

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

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

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

## Proxy Enrollment

### Proxy Enrollment

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

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

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

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



# Proxy Enrollment Details

## Proxy Enrollment Details (Dynamic)

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

Proxy ID <b>282</b>	Title <b>General Safety</b>	Assignment Date <b>12/9/2022 3:10 PM</b>	Request Type <b>Assign &amp; Approve Certification - Item is not registered</b>
Selection Criteria <a href="#">View</a>	Requested By <b>Tatu, Debbie</b>	Status <b>Processed</b>	Requested Date <b>12/9/2022 3:10 PM</b>

### Proxy History

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

Showing 1-2 of 2

### Modification History >

# Create Tool Enhancements

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

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

## Add Hotspots to Images

Encourage interaction and engagement by adding a hotspot to content.

To add a hotspot:

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

## Add Hints to Questions

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

To add hints to questions:

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

## Change Fonts

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

To change fonts:

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

## Export content as SCORM 1.2

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

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

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

## How Does this Enhancement Benefit My Organization?

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

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

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

	<p>(in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	
Create Tool	<p>Grants access to Create Tool for content authoring. This permission cannot be constrained.</p>	Learning - Administration

# Curriculum Player 2.0 - Milestone 2 (Open Beta)

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

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

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

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

This enhancement is available in Stage on February 16th.

## Tests and Sections Inside Curriculum Player 2.0

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

- Online Courses
- Videos, Materials
- Tests and Sections

The legacy curriculum player is launched for all other curriculum.

## Expandable Child Training Table of Contents

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

## Background Polling to Update Transcript Statuses

To optimize transcript status transitions:

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

## Rich Text Formatting in Training Descriptions

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

- Bold
- Header
- Paragraphs

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

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

## **Redirect to Post-Completion Activity**

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

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

## **Considerations**

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

## **Implementation**

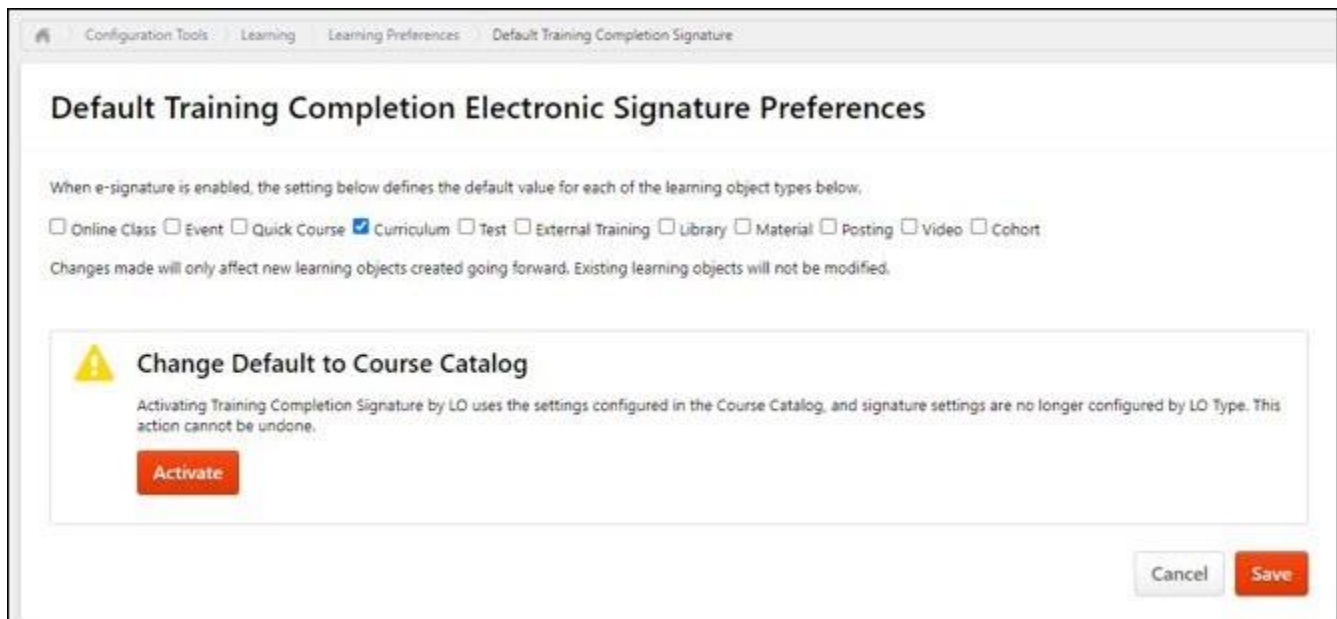
- This functionality must be enabled in Feature Activation Preferences.
- If currently enabled in Stage, no action is required to use the new features.

# Custom E-Signature Message for Sessions

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

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

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



Configuration Tools > Learning > Learning Preferences > Default Training Completion Signature

## Default Training Completion Electronic Signature Preferences

When e-signature is enabled, the setting below defines the default value for each of the learning object types below.

Online Class  Event  Quick Course  Curriculum  Test  External Training  Library  Material  Posting  Video  Cohort

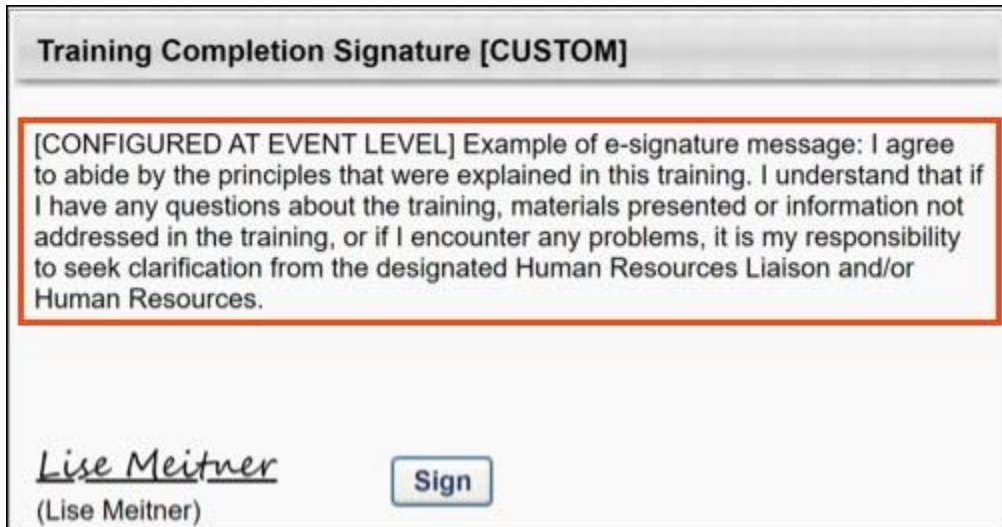
Changes made will only affect new learning objects created going forward. Existing learning objects will not be modified.

**Change Default to Course Catalog**

Activating Training Completion Signature by LO uses the settings configured in the Course Catalog, and signature settings are no longer configured by LO Type. This action cannot be undone.

**Activate**

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



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

## How Does this Enhancement Benefit My Organization?

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

## Considerations

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

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

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



# Essential Transcript Data Deletion for Compliance (Early Adopter)

## Essential Transcript Data Deletion for Compliance (Early Adopter)

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

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

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

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

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

### Deleted Data

The following Essential Transcript Data is deleted:

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

### Time-based Data Deletion

The following applies to time-based data deletion:

- Time-based deletion occurs automatically after a certain period. The execution itself is triggered on daily basis for Inactive User's Learning Transcript Data based on the User's termination date.
- The user must belong to a Legal Entity OU and must be inactive. Users should be assigned to the Legal Entity before their termination date.

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

## Implementation

This functionality is off by default. Contact GCS to enable.

## Permissions

The following existing permissions apply to this functionality:

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

## **Essential Transcript Data Deletion for Compliance FAQs (Early Adopter)**

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

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

**Q: Will Transcript Deletion preserve statistics?**

A: No, deletion does not preserve statistics.

**Q: Will Transcript Data related to xAPI be deleted?**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

A: API only returns transcript data for active users.

# Express Class Definable Training Time

## Express Class Definable Training Time

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

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

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

To define training time:

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

## New Reporting Field

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

## Considerations

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

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

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



# Express Class Definable Training Time FAQs

## Supported Training Types

Q: What training types support this functionality?

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

## Observed Training Hours and Minutes

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

A: The maximum total definable time is 99999 hours.

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

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

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

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

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

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

## Transcript Time in Training (min) Property

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

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

**ILT**

## ILT – New Roster (Open Beta)

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

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

### Implementation

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

### Permissions

The following existing permissions apply to this functionality:

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

## ILT Roster – New User Interface (Early Adopter)

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

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

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

- Parent Roster tab
- Roster assignments tab
- Roster attendance and scoring tab
- Waitlist page
- Exception Requests page

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

### Implementation

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

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Attachments in Transcript - Manage	Grants ability to upload new attachments and delete existing attachments for LOs on a user's transcript. Users with this permission are automatically granted permission to view attachments. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's self, User's ILT Provider, ILT Provider, and Instructor.	Learning Administration
Attachments in Transcript - View	Grants ability to view attachments that have been uploaded for LOs on a user's transcript. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's self, User's ILT Provider, ILT Provider, and Instructor.	Learning

Exceptions - Manage	Grants ability to approve or deny Instructor Led Training Exception requests (e.g. availability exceptions, pre-requisite exceptions). This permission works in conjunction with the Event - View and Exceptions - View permissions. This is an administrator permission.	Learning - Administration
Exceptions - View	Grants view-only access to instructor led training exception requests, via the ILT Events and Session screen. This permission works in conjunction with the Events - View permission. This is an administrator permission.	Learning - Administration
Roster - Add Attachments	Grant user the ability to upload files to the Roster page. User must also have Manage Roster or View Roster permission. This is an administrator permission.	Learning - Administration
Roster - Add Pending Users	Grant ability to add pending users to the ILT session roster. The administrator must also have the Roster - Manage or Roster - View permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Roster - Add Users	Grants ability to add named users to class rosters for instructor led training sessions. This permission works in conjunction with the Roster - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Roster - Batch Withdrawal or Move Users	Grants ability to withdraw multiple users for an instructor led training session class roster, or to move them from one class roster to another. This permission works in conjunction with the Roster- View permission.	Learning - Administration
Roster - Email Registered Users	Grants ability to send a custom email message to all students listed on the roster for an instructor led training session. An additional link appears on ILT roster page for sending such messages. This is an administrator/ILT instructor permission.	Learning - Administration

Roster - Increase Seats	Grant user the ability to increase the session's available seats when adding users to the session roster if the added users exceed the number of available or reserved seats. User must also have Manage Roster or View Roster permission. This permission cannot be constrained. This is an administrator permission.	Learning - Administration
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Roster - View	Grants view-only access to instructor led training session rosters. This permission works in conjunction with Events - View and Sessions - View permissions. This permission can be constrained by Instructor, ILT Provider, User's ILT Provider, and User as Instructor. This is an administrator permission.	Learning - Administration
Roster - View Evaluation Status	Grants ability to view whether students' learning evaluations are pending for a given session. Without this permission, the admin sees status "completed" for any users who are actually in pending evaluation status on the roster This permission works in conjunction with Roster - View permission. This is an administrator permission.	Learning - Administration
Roster - Withdrawal Penalty Override	Grants ability to override the withdrawal penalty when withdrawing a student from an ILT session. This permission works in conjunction with the Events - View, Sessions - View, Roster - View and Roster - Manage permissions. This is an administrator permission.	Learning - Administration

Session Details - View Student Roster	Allows user to view student roster for a given ILT session via a link on ILT session details screen when searching for training, and from transcript details screen after a session has been added to the user's transcript. This is an end user permission.	Learning
View Transcript Item	Grants ability to view details of learning objects that appear on the transcript (training record), by clicking on the name of the learning object. Users must also have the Bio About - View permission in order to access the transcript within Universal Profile. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, or User's Self. This is an end user permission.	Learning - Administration
Waitlists - Manage	Grants ability to approve or deny instructor led training waitlist requests. This permission works in conjunction with the Events - View and Waitlists - View permissions. This is an administrator permission.	Learning - Administration
Waitlists - View	Grants view-only access to instructor led training session waitlists, via the ILT Events and Sessions screen, enabling the user to view the waitlists for various ILT sessions. This permission works in conjunction with Events - View and Sessions - View permissions.	Learning - Administration

# Reporting Fields - Learning

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

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

## Training Details

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

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Default Language	This field displays the default language for the learning object.	Text
Original Approval Applied?	This field displays whether the training allows subsequent instances of the training to be approved based on the original approver.	Text
Multiple Assignments Allowed?	This field displays whether the training can be assigned to the same user more than once.	Text
Multiple Requests Allowed?	This field displays whether users can request the training more than once.	Text
Thumbnail URL	This field displays the location of the learning object thumbnail.	Text

## Certifications

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

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

## Implementation

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

## Permissions

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

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



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

# SCORM 1.2 Embedded Videos to Play Full-Screen

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

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

**This functionality will be available with the UAT3 stage deployment.**

## Implementation

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

# Search Language Enhancements - March 2023

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

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

## How Does this Enhancement Benefit My Organization?

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

## Frequently Asked Questions (FAQs)

**Are there any visual changes associated with this update?**

No visual changes are associated with this update.

**How would I notice these enhancements?**

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

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

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

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

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

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

## Implementation

This functionality is automatically enabled for all organizations.

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

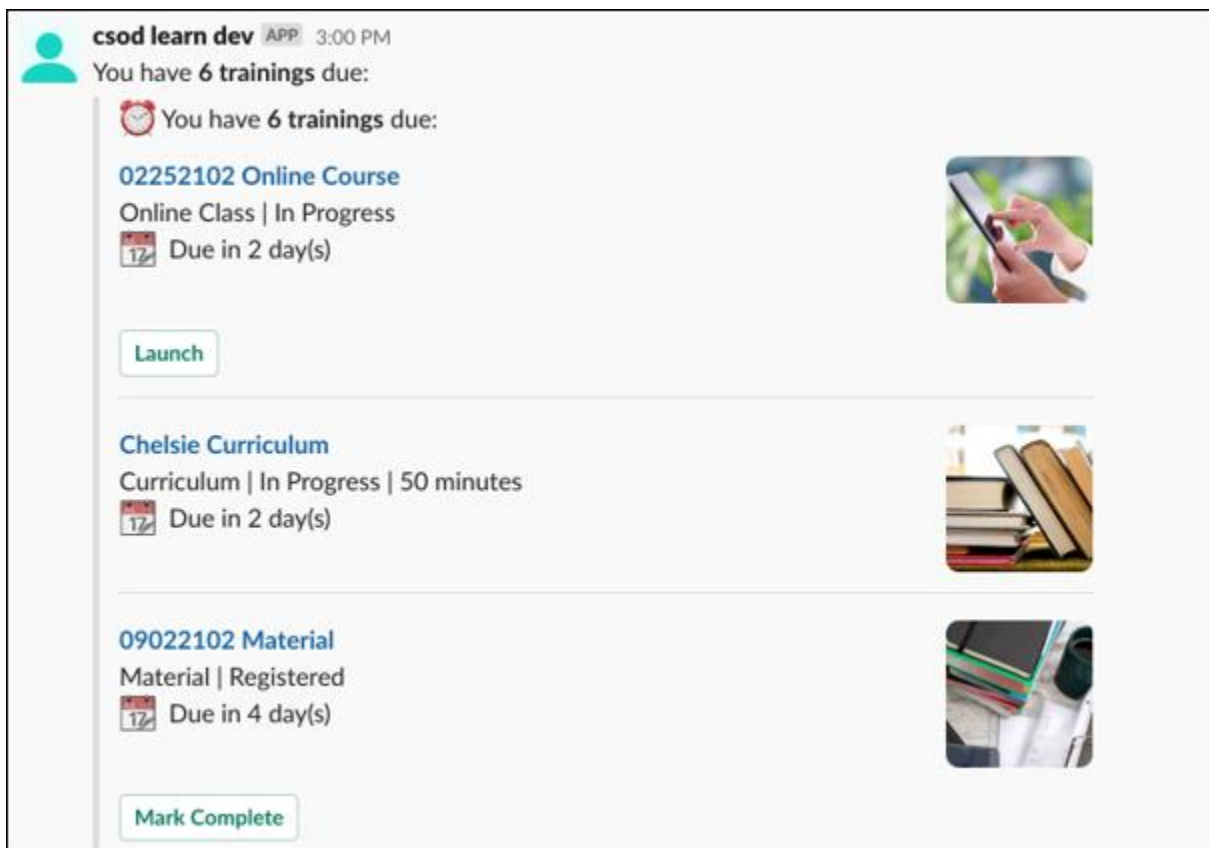
# Slack Integration (Learning in the Flow of Work)

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

Using the Slack chatbot, Learners can do the following:

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

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



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

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

## **Implementation**

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

This integration is not available for the Pilot environment.

# Stripe – Payment Gateway

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

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

Stripe provides the following key features:

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

## Considerations

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

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

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

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

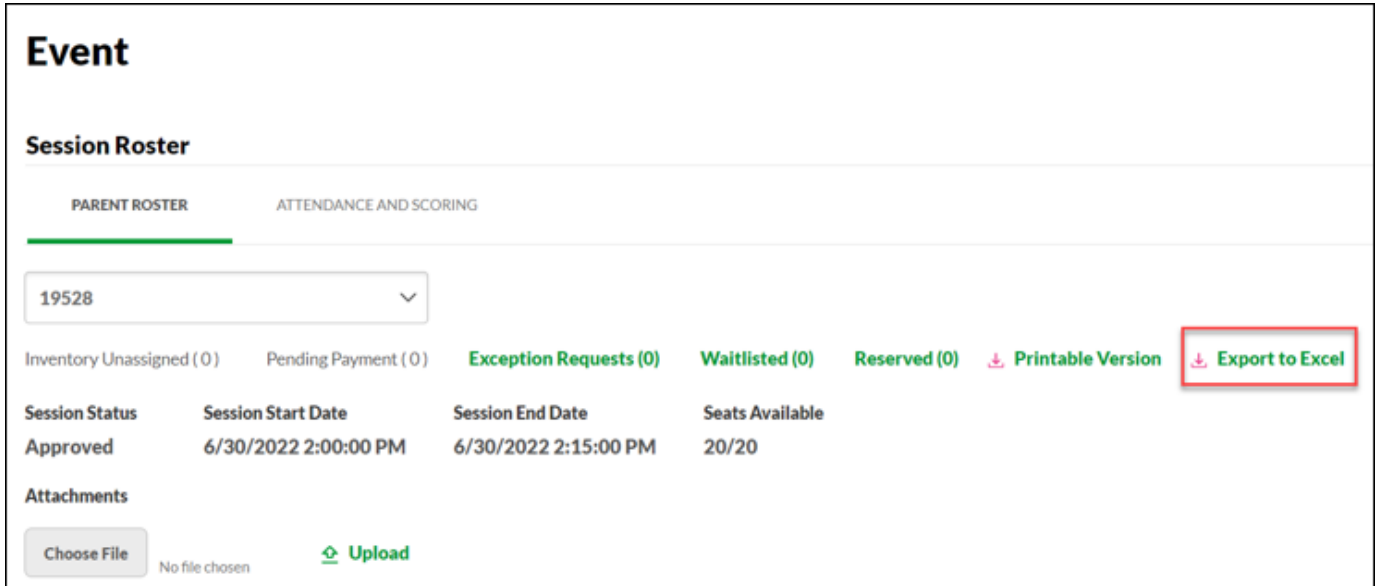
Edge Integrations -  
Manage

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

Edge

# Upgrade Excel Format of Exports in ILT (Early Adopter)

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



**Event**

**Session Roster**

PARENT ROSTER ATTENDANCE AND SCORING

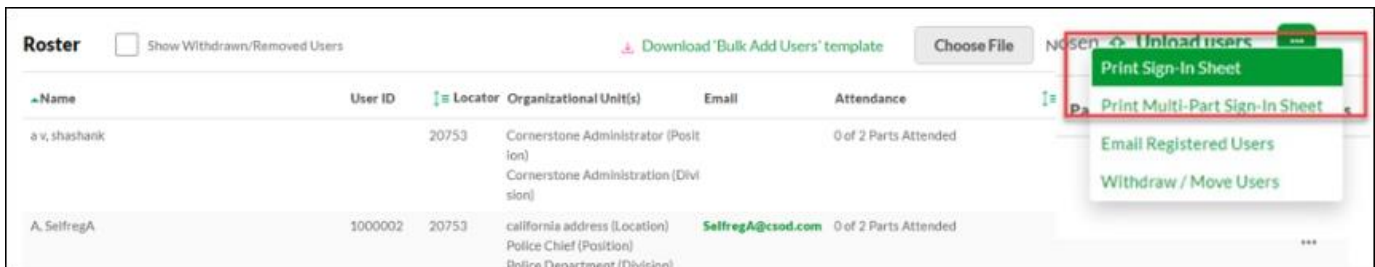
19528

Inventory Unassigned (0) Pending Payment (0) Exception Requests (0) Waitlisted (0) Reserved (0) Printable Version **Export to Excel**

Session Status	Session Start Date	Session End Date	Seats Available
Approved	6/30/2022 2:00:00 PM	6/30/2022 2:15:00 PM	20/20

Attachments

Choose File No file chosen Upload



**Roster**  Show Withdrawn/Removed Users Download 'Bulk Add Users' template Choose File **Unload users**

Name	User ID	Locator	Organizational Unit(s)	Email	Attendance
a v, shashank	20753		Cornerstone Administrator (Position) Cornerstone Administration (Division)		0 of 2 Parts Attended
A. SelfregA	1000002	20753	california address (Location) Police Chief (Position) Police Department (Division)	SelfregA@csod.com	0 of 2 Parts Attended

Print Sign-In Sheet  
Print Multi-Part Sign-In Sheet  
Email Registered Users  
Withdraw / Move Users

## Considerations

Additional exports are targeted to be upgraded in future releases.


## Implementation

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



# Versioning Redesign Enhancements (Open Beta)

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

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

## Considerations

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

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Admin - Manage	<p>Grants ability to create new and edit/update existing curricula. This permission can be constrained by OU, User's OU, Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p> <p><b>Tip:</b> <i>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.</i></p>	Learning - Administration
Curriculum Admin - View	<p>Grants view only access to curriculum details via Curriculum Administration screen. Does not include ability to view details of users enrolled in curricula. This permission can be constrained by Provider, OU, User's OU, and User's LO Availability.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p> <p><b>Tip:</b> <i>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.</i></p>	Learning - Administration
Curriculum Owner	<p>Grants ability for those designated as owner of one or more existing curricula to make edits/updates to those curricula. This is an administrator permission.</p>	Learning - Administration
Curriculum Player Options	<p>Grants ability to enable Curriculum Player feature via the General step when creating or editing a curriculum.</p>	Learning - Administration

	This permission cannot be constrained. This is an administrator permission.	
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
Learning Features Self Activation	Grants access to the Feature Activation Preferences page, where an administrator can activate new features associated with Learning, Connect and Extended Enterprise.	Learning - Administration

# View and Edit Test Versions with a Future Effective Date

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

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

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

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

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

## Implementation

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

## Permissions

The following existing permissions apply to this functionality:

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Test Engine - Manage	Grants ability to create and edit/manage tests via the Test Engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
Test Engine - Review	Grants ability to view details of user results for tests, via the test engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

Test Engine - View	Grants ability to view existing tests in the test engine. Administrators with this permission can view each section of a test and print tests. Administrators with this permission can enter changes when viewing a test, but these changes cannot be saved. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration
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