
# Careers Release Notes October 2020

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# Careers

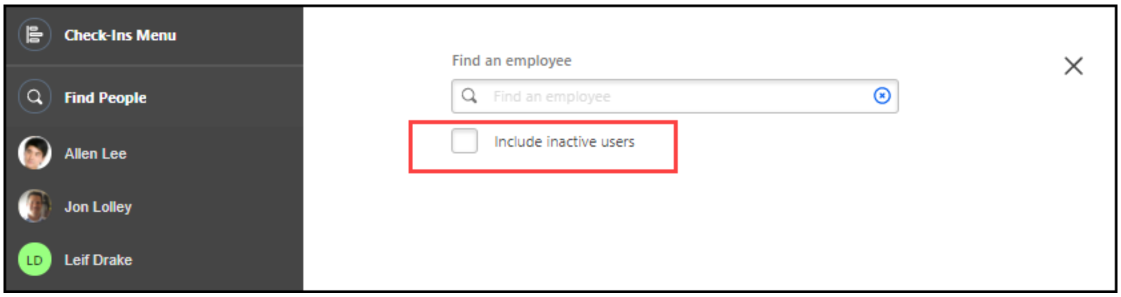
# Check-Ins

# Check-Ins Include Inactive Users in Search

Prior to this enhancement, when Check-In users searched for participants, the search results did not include inactive users.

With this enhancement, a new **Include inactive users** checkbox lets users easily search for previously conducted Check-Ins with participants who are inactive or no longer work for the company. For easy identification, inactive user names have an (Inactive) suffix. Users can view the Check-Ins summary, historical information, and meeting notes for inactive users. Additionally, users can restore or archive Check-Ins with inactive users if necessary.

To access the search feature, select **Find People**.




## How Does this Enhancement Benefit My Organization?

Users can now access the historical and archived Check-In discussions with inactive users.

## Considerations

Users cannot create new Check-Ins with inactive users.

## Implementation

This feature is available to clients who purchased the Performance or Career suite and is already using Check-Ins.

## Permissions

The following existing permission applies 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 | Performance |

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| | Relationship. Users who have constraints in the "Check-Ins - Create" permission cannot create a new Check-In with anyone who doesn't belong to the constraints. However, they will still be able to view and update any Check-In that they are a participant of. This is an end user permission. | |

# Check-Ins Topic Management Enhancement

Prior to this enhancement, when adding or removing topics, users selected the Manage Topic button on the meetings and topics page or the Manage Topics drop-down. Using these options did not make it clear that changes to topics applied to all current and previous meetings in that Check-In series, even though the change did not apply to past meetings.

With this enhancement, the Manage Topic options are no longer available. Users can now manage topics via the Manage Topics settings page, which clarifies that adding or editing topics applies to the whole Check-Ins series, not just an individual meeting.

To view the Manage Topics settings page, go to your home page and click the appropriate check-in. Select the vertical ellipses at the top right, select Check-Ins Settings, and then select the Manage Topics tab.

## Implementation

This feature is available to clients who purchased the Performance or Career suites and is already using Check-Ins.

## Permissions

The following existing permission applies 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 who have constraints in the “Check-Ins - Create” permission cannot create a new Check-In with anyone who doesn’t belong to the constraints. However, they will still be able to view and update any Check-In that they are a participant of. This is an end user permission. | Performance |

# Check-Ins – View Incomplete Follow-Ups

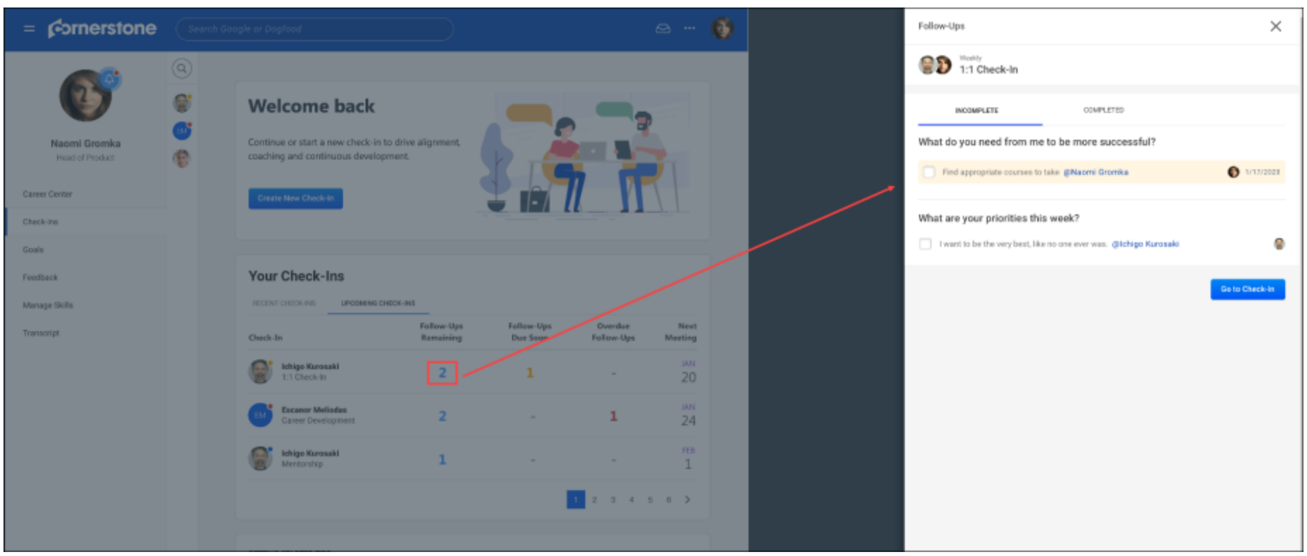
Prior to this enhancement, to review their incomplete follow-up action items, Check-Ins participants had to drill down through all check-in meetings one-by-one.

With this enhancement, Check-Ins participants can see all of their Follow-Up action items on the Upcoming Check-Ins tab of the home page.

Incomplete Follow-Ups are color-coded based on the due date:

- Red - Past the assigned due date
- Yellow - Due within seven days
- Black - Any Follow-Up in a Check-In that's incomplete, regardless of due date

Click any Follow-Ups number to open the Follow-Ups flyout to mark an item complete or incomplete.




Additionally, on the Follow-Ups flyout, the **GO TO CHECK-IN** button opens the meetings and topics page.

## How Does this Enhancement Benefit My Organization?

Employees and managers can now see all assigned incomplete Follow-Ups in one location.

## Implementation

This feature is available to clients who purchased the Performance or Career suites and is already using Check-Ins.

## Permissions

The following existing permission applies to this functionality:

| PERMISSION | PERMISSION DESCRIPTION | CATEGORY |
|---|---|---|

| NAME | | |
|---|---|---|
| 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 who have constraints in the “Check-Ins - Create” permission cannot create a new Check-In with anyone who doesn’t belong to the constraints. However, they will still be able to view and update any Check-In that they are a participant of. This is an end user permission. | Performance |

# Dev Plans

# Cancel Primary Development Plans

Prior to this enhancement, users were unable to cancel their primary development plan. In some cases, plans created by mistake or to test functionality, become the “primary” plan if there were no other development plans.

With this enhancement, users can cancel primary development plans, even when it is the only development plan available.

## Considerations

There is no change to who can cancel a development plan. Users can cancel their own plans, and, when configured in Development Plan Preferences, managers can cancel development plans for their subordinates.

## Implementation

This functionality is on by default.

## Permissions

The following existing permission applies to this functionality:

| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |
|---|---|---|
| Assign OU Development Plans | Grants ability to create and assign Development Plans to all users within specified organizational units or custom groups. This is an administrator permission. | Performance - Administration |
| Development Plans - Manage | Grants ability to create, edit and manage development plans for self (and others depending on role and permissions). This is an end user permission. | Performance |
| Development Plans - Edit | Grants ability for user to edit a development plan when the Redesigned Development Plans functionality is enabled. The permission constraints determine whose development plans the user can edit. This permission can be constrained by OU, User's OU, User's Self, and User Self and Subordinates. This is an end user permission. | Performance |
| My Competency Assessments | Enables users to view their own competency assessment results from the Competency Assessment | Performance |

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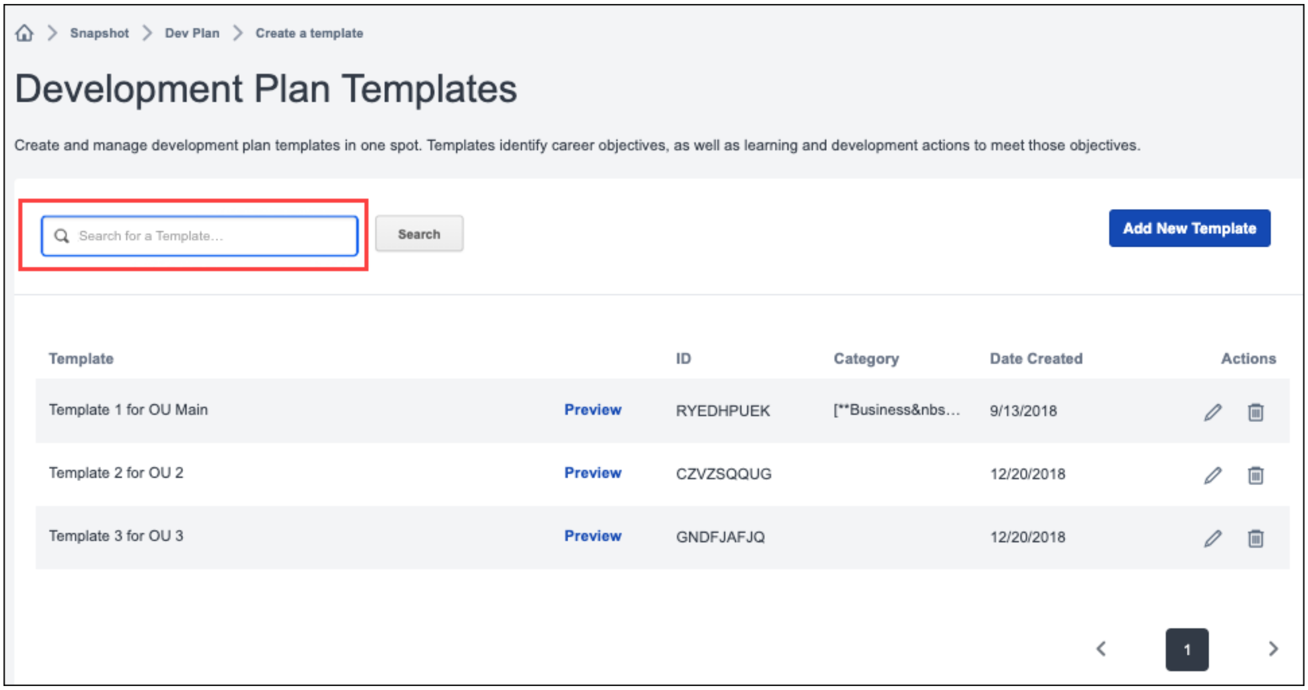
| | Results screen. In addition, when creating a development plan and adding an objective to the plan, this permission enables users to browse recommended training and developmental actions from competency models, when this functionality is enabled in Development Plan Preferences. This is an end user permission. | |
| Recommended Learning - View Recommended Learning for Others | Grants ability to view the recommended learning that is generated by machine learning for another user. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU. This is a manager permission. | Performance |
| Snapshot - Development Plans | Enables user to view the Development Plans widget and subpage within the Universal Profile - Snapshot page for users within their permission constraints. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, and Employee Relationship. ***Best Practice:*** *For most users, this permission should be constrained by User Self and Subordinates.* | Universal Profile |

# Search Plan Templates in Development Plan Administration

Prior to this enhancement, to locate a specific development plan template, administrators manually paged through the Template table.

With this enhancement, administrators can search for templates by title or description and view the relevant search results in the Template table.




## Implementation

This functionality is automatically enabled.

## Permissions

The following existing permissions apply to this functionality:

| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |
|---|---|---|
| Development Plan Categories - Manage | Grants ability to create and edit categories used to classify development plans. This is an administrator permission. | Performance - Administration |
| Development Plan Templates - Manage | Grants ability to create and edit development plan templates that can be made available for use by end users. This is an administrator permission. | Performance - Administratio |

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