



## Performance Release Notes November 2022

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# Performance

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# Compensation

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## Deprecation of Compensation Loads for Data Load Wizard (DLW) with the November 2022 Release

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The ability to perform Compensation loads and feeds using Data Load Wizard (DLW) is deprecated with the November '22 Release. DLW Compensation loads and feeds include Employee Salary, Salary Structure, and Individual Targets. The modern self-service Edge Import framework for all Compensation loads and feeds is available.

Since the deprecation was first announced, Cornerstone has reached out proactively to all impacted customers to help customers migrate loads and feeds to Edge. In addition, Employee Compensation has been enabled for Compensation customers. Both End-of-Support and EndOf-Life for Data Load Wizard Compensation loads and feeds will occur with the November '22 release on November 4.

# Competencies

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## Learning Object Checklist Enhancement

With this enhancement, a new setting is now available to control whether or not a Completed status will be recorded in a curriculum or certification for an LO (Learning Object)-based Observation Checklist.

The new checkbox named "Mark checklist within a certification or curriculum Completed even if the user checklist is Completed with a Failed score" is visible under the following circumstances:

- A Score type rating scale is enabled
- A Failure Threshold is configured
- The Checklist Type is Learning Object

To access this new functionality, go to **ADMIN > TOOLS > PERFORMANCE MANAGEMENT > OBSERVATION CHECKLISTS**.

The screenshot shows the 'Preferences' page for Learning Object Checklists. The 'Checklist Type' is set to 'Learning Object'. A red box highlights the checkbox 'Mark checklist within a certification or curriculum Completed even if the user checklist is Completed with a Failed score', which is checked. Below this are sections for 'DATE CRITERIA', 'VALIDATION', 'SIGNATURE', and 'APPROVAL'.

- If this option is enabled, a completed status is recorded regardless of the score.
- If this option is not enabled, the Checklist remains In Progress until it passes.

## How Does this Enhancement Benefit My Organization?

Administrators can now specify whether or not a completed status is sent to the Learning Management System (LMS) if the checklist is an LO included in a curriculum or certification and the threshold is not met.

## Implementation

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

## Permissions

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The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Observation Checklist Admin - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration



# Goals

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## Consolidated Management of Goals

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Prior to this enhancement, before task completion, goals created in the goal planning section of a Performance Review Task were not visible on the My Goals page, Snapshot Goals, or in Reporting 2.0. Additionally if a user created a goal and the manager did not complete their review step, once the task expired, the goal did not appear on the My Goals page. Goals in Pending approval status were not visible in the goal planning section.

With this enhancement, before task completion:

- Goals created in the Goal Planning section are visible in read only status on the My Goals page, Snapshot Goals, and in Reporting 2.0.
- A new "In Review" status is added to identify goals currently being worked on in a goal planning section.
- The View History tab now shows the modification history for goals created in a goal planning task.

If a Performance Review Task contains a goal planning steps that expires, the goals created in the review task are now moved to Draft status and the Performance Review Task Expiration-Goal Moved to Draft Status email is triggered if configured in Email Administration. These goals are now available on the My Goals page.

Goals in Pending Approval status are now visible in the goal planning section of a Performance Review Task. Approvers can now approve a goal from this page.

## Considerations

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The Performance Review Task Expiration-Goals Move to Draft Status email must be activated in Email Administration to trigger an email when goals created in the review task move to Draft status.

## Implementation

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

**Note:** *This enhancement impacts current and future performance review tasks.*

## View Only Access for Goals

Prior to this enhancement, users with access to another person's public goals had view and edit rights.

With this enhancement, on the Universal Profile Snapshot page, view and edit rights to others' public goals is controlled independently. Public goals are goals that have the "Allow other users to see and align" option selected.

## Implementation

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

## Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Snapshot Goals - Manage	<p>Enables user to manage their own goals, and others public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile
Snapshot Goals - View	<p>Enables user to view their own goals, and others' public goals, using the Goals widget and subpage within the Universal Profile - Snapshot page, for users within their permission constraints. This permission can be constrained by Employee Relationship, OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, and User's Direct Reports.</p> <p><b>Best Practice:</b> For most users, this permission should be constrained by User Self and Subordinates.</p>	Universal Profile

**Note:** "Snapshot Goals - Manage" was previously named "Snapshot - Goals."

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Company Goals - Create	Grants access to create goals that appear to all users as "company goals." This permission cannot be constrained. This is an administrator permission.	Performance - Administration
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

## Update Custom Emails In Review Tasks

Prior to this enhancement, after a review task is launched, administrators had to create work orders to edit or update custom emails.

With this enhancement, after a review task is launched, administrators can edit all fields in custom a custom email template.

Action	Action Type	Description	Add Email
Performance Review Step Assigned	Performance Management	Performance review of a specific user assigned	

  

Email	Category	Recipients	Availability	Custom/Default	Language	Active	Options
DJ - A Performance Review Step has been assigned (for Reviewee)	Notification	Reviewee	All users in Division: DJ Enterprise (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
DJ - A Performance Review Step has been assigned (for Reviewee's Manager)	Notification	Reviewer	All users in Division: DJ Enterprise (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
GS test copy - IC_Step Assigned Email	Notification	Reviewer	All users in Division: YG Entertainment (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
IC_Step Assigned Email	Notification	Reviewer	All users in Division: YG Entertainment (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned	Notification	Reviewee	All users in Division: Sims 3 (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned	Notification	Reviewee	All users in Division: Abacus worldwide (Include Subordinates)	D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned - Reviewee	Confirmation	Reviewee		D	English (US)	<input type="checkbox"/>	
Performance Review Step Assigned - Reviewer	Confirmation	Reviewer		D	English (US)	<input checked="" type="checkbox"/>	

## Considerations

- Customers cannot delete a custom email after the task is launched.
- Customers can edit current emails, but not add new emails.

## 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	Grants ability to assign performance review tasks	Performance -

Task - Manage	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.	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
Email - Edit From Address	Grants ability to edit the "from" address when creating or modifying an email trigger. In addition, the <b>Allow user to change email address</b> 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