

## Cornerstone October 2018 Release Notes

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# What's New for October 2018

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## What's New for October '18

The following release resources are available within Online Help:

- **Printable Release Notes** - This topic provides a printable version of all release notes content. *See [Printable Release Notes for October 2018](#).*
- **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 October '18 Release](#) on page 19 [for additional information](#).*
- **New Custom Reporting Fields** - This topic provides a list of all custom reporting fields that are newly added with this release. *See [Master List of New Report Fields for October '18 Release](#) on page 22 [for additional information](#).*
- **Release Notes Updates** - This topic provides a complete list of all changes that have been made to the release notes. *See [Release Notes Updates](#) on page 24 [for additional information](#).*

*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 October '18 release:

### Compensation Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Data Load Wizard (DLW) Salary Load Deprecation in 2019	N/A	See Core Features for more information.

### Core Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
ADP Workforce Now Single Sign-On (SSO)	Enable via Edge	See Edge Integrate Features for more information.
<b>Custom Reports - User Fields</b>	Yes	With this enhancement, administrators can report on group data, as it relates to users, in combination with other existing standard and custom fields.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
(Groups)		
Data Load Wizard (DLW) Salary Load Deprecation in 2019	N/A	In 2019, Cornerstone will remove the option to load Compensation data via the Data Load Wizard (DLW). The exact timing of this is yet to be determined but will be announced in advance to give clients time to plan. To load Compensation data, clients will need to use the new Edge Import Employee Salary Load tool which was made available in the August '18 Release to clients with Compensation or Cornerstone HR and Data Load Wizard (DLW).
FTP Folder Access	Yes	With this enhancement, the FTP Account Access page now also enables organizations to connect to their FTP account. If there is no FTP mapped to the portal, then a message is displayed to indicate this. In addition, the warning message that appears when resetting the FTP account password is updated to indicate that this does not impact users who connect to the FTP folder from within the portal.  <i>This functionality will be available in a post-release patch.</i>
Portal Security - WYSIWYG HTML Editor Validation Rules	Yes	As part of Cornerstone's ongoing commitment to client portal security and to provide a consistent user experience, we're continuing to strengthen the security where the WYSIWYG HTML Editor is used. With the August '18 Release, Cornerstone already strengthened portal security by validating that custom code on Custom and Welcome pages is within our Whitelisted Customized Elements. <i>See <a href="#">Whitelisted Customizable Elements</a>.</i>  Planned for the October '18 Release, Cornerstone will enforce these same validation rules in other parts of your portal where the WYSIWYG HTML Editor is used.
Reporting 2.0 (Early Adopter)	Yes, after enabling Reporting 2.0	In addition to smaller enhancements, the following highlighted features are available with the October '18 release: <ul style="list-style-type: none"> <li>○ <b>Succession</b> is now supported (support for Learning, Recruiting, Performance, and Extended Enterprise was introduced as part of previous releases).</li> <li>○ Exception Reporting - Learning (Transcripts)</li> <li>○ Pre-Built Templates</li> <li>○ Aliasing</li> <li>○ Additional Fields (Course Interaction, User Fields)</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<p>[Groups])</p> <ul style="list-style-type: none"> <li>○ Usability Enhancements</li> </ul>
<b>Retirement of Current Workday Integration in March 2019</b>	N/A	<p>Last year, Workday announced the deprecation of its Cornerstone integration templates on March 9, 2019. Don't worry, we've got you covered.</p> <p>Our Edge-ready integration, scheduled for Fall 2018, will replace existing functionality, including:</p> <ol style="list-style-type: none"> <li>1. Core Data (Users &amp; Organization Units) Inbound integration from Workday to Cornerstone</li> <li>2. Completed Transcripts Outbound Integration from Cornerstone to Workday</li> </ol>
<b>RTDW Updates to Reporting API, RDW, and Data Exporter</b>		<p>Impacting only clients using Reporting API, Replicated Data Warehouse, and Data Exporter, several Real-Time Data Warehouse categories will be deprecated, and the updates made may break applications, scripts, or functionality based on earlier versions of RTDW objects.</p>
Ultimate Software's UltiPro Core Data Inbound Integration Enhancements	Enable via Edge	<b>See Edge Integrate Features for more information.</b>
Ultimate Software's UltiPro Single Sign-On (SSO)	Enable via Edge	<b>See Edge Integrate Features for more information.</b>
<b>Welcome Page Preferences - Remove Customization Option</b>	Yes	<p>With this enhancement, if a Welcome page is customized for an organizational unit (OU), administrators can now remove the custom settings from the OU's Welcome page. This action can be done when editing the settings for that OU. When the custom settings are removed, the OU's Welcome page inherits the settings from the parent OU.</p>



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Workday Core Data Inbound Integration		See Edge Integrate Features for more information.

## Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>e-days Absence Management - View Entitlement Balance and Absence History</b>	Enable via Edge	<p>With this release, the e-days Absence Management integration is enhanced. Organizations that use e-days for absence management can now leverage this integration to enable users to quickly view their entitlement balances and absence history via a new My Absence Home dashboard. Users can also easily access their e-days account to request absences from their dashboard. This new dashboard is located within Universal Profile.</p> <p><i>The My Absence Home page was released with the August 17, 2018 patch. The Request Absence button and My Requests section were released with the September 28, 2018 patch.</i></p>
<b>Forms - Before &amp; After Changes for Approvers</b>	Yes	<p>With this enhancement, when a form approver is reviewing a form that has updated values, they can see the current value next to the new value.</p> <p><i>This enhancement will be released with the November 30, 2018 patch.</i></p>
Org Chart - Hide Email and Phone Number	Yes	See View Features for more information.

## Edge Develop Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
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FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Assessment Connector Enhancements	Yes	With this enhancement, organizations can select which fields are sent to their assessment provider during the integration setup in Edge. In addition, organizations can send additional fields to the assessment vendor during the initial request, eliminating the need for manual entry.

## Edge Integrate Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
ADP Workforce Now Single Sign-On (SSO)	Enable via Edge	<p>With this enhancement, a new ADP Workforce Now Single Sign-On integration is now available from the Edge Marketplace. This enables organizations to quickly purchase, configure, and enable the integration.</p> <p><b>Note:</b> Organizations that have already implemented SSO from ADP to Cornerstone <u>do not</u> need to purchase and enable this integration.</p> <p><i>This functionality will be available in a post-release patch.</i></p>
e-days Absence Management - View Entitlement Balance and Absence History	Enable via Edge	<b>See Cornerstone HR Features for more information.</b>
First Advantage (FADV) Background Check Enhancements	Enable via Edge	<b>See Recruiting Features for more information.</b>
LinkedIn Recruiter	Enable via Edge	<b>See Recruiting Features for more information.</b>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
System Connect		
<b>Ultimate Software's UltiPro Core Data Inbound Integration Enhancements</b>	Enable via Edge	<p>With this enhancement, organizations that are using the Ultimate UltiPro Core Data Inbound Integration can now specify the Tenant URL, which enables the organization to specify the correct UltiPro environment for the data sync, such as Production or Pilot. In addition, the default language preference that is set in UltiPro is now passed to Cornerstone, which is used when a user is created in Cornerstone; if the user's language is later updated in Cornerstone, the default language does not overwrite the user's new language setting. If the UltiPro default language preference is not available or enabled in Cornerstone, then the Cornerstone portal default language is used for the user. Lastly, when Cornerstone sends a summary email to the UltiPro integration contact, the email now specifies the environment in the email subject and attaches an audit log of all successes and failures; previously, only failures were included in the audit log.</p> <p><i>This functionality will be available in a post-release patch.</i></p>
<b>Ultimate Software's UltiPro Single Sign-On (SSO)</b>	Enable via Edge	<p>The UltiPro Single Sign-On integration allows organizations to provide a seamless experience to their employees via Single Sign-On (SSO). Simply set up an outbound data feed from UltiPro to Kronos or the UltiPro Core Data Inbound Integration and enable this integration to allow your employees to log in to Cornerstone from UltiPro.</p> <p><i>This functionality will be available in a post-release patch.</i></p>
<b>Workday Core Data Inbound Integration</b>	Enable via Edge	<p>The new Workday Core Data Sync integration is for organizations using Workday as the source for their HCM data. This integration enables organizations to manage organizational units (OUs) and users in Workday, and have those changes flow into the Cornerstone system automatically. The inbound integration runs nightly (US-Pacific) and can be triggered on demand.</p> <p><i>This functionality is not available during UAT. On October 26, this integration will be available for Production, Stage, and Pilot portals via the Edge Marketplace.</i></p>
<b>Workday</b>	Enable via	The new Workday Transcript Outbound integration is for

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Transcript Outbound Integration	Edge	<p>organizations that are using the Learning module and using Workday as the source for their HCM data. This integration is a one-way sync of completed transcripts from Cornerstone to Workday. The outbound integration runs nightly (US-Pacific) and can be triggered on demand.</p> <p><i>This functionality is not available during UAT. On October 26, this integration will be available for Production, Stage, and Pilot portals via the Edge Marketplace.</i></p>

## Engage Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Campaign Random Sampling	Yes	With this enhancement, Engage administrators can configure their campaign surveys so that they are sent a random subset of users within the selected campaign availability. This enables them to constantly monitor employee opinions at their organization through frequent recurring campaigns without overwhelming users with too many surveys.
Enhancements to Engage View-only Reporting Constraints	Yes	With this enhancement, the Engage permission for viewing Engage reporting supports a full range of permission constraints, allowing administrators to grant managers, HRBPs, indirect managers, and other users the appropriate level of access to view confidential Engage results for their teams and organizations.
Survey and Campaign Configurability	Yes	<p>With this enhancement, Engage administrators can do the following using new Engage campaign configuration options:</p> <ul style="list-style-type: none"> <li>○ Configure a custom survey title for participants</li> <li>○ Translate the <b>Survey Title</b> and <b>Survey Name</b> fields into other languages</li> <li>○ Configure the header to feature your organization's corporate logo for Engage campaigns</li> </ul>

## Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Auto Upgrade to Content Publishing Redesign with Online Course Versioning in 2019</b>		In 2019, Cornerstone will retire the Course Publisher, and all portals will be automatically upgraded to the Content Uploader with Online Course Versioning, which was made generally available during the October '17 release. The exact date of the automatic upgrade is yet to be determined, but is being announced far in advance to provide administrators with sufficient time to plan for the change.
<b>Cornerstone Learn Curriculum Support</b>		With a post-release patch, users of the Cornerstone Learn app will be able to launch curricula and view training items inside curricula from their transcripts via the Cornerstone Learn app. Users will also be able to launch and manage the training contained inside curricula on their transcripts.
<b>Custom Banner Links in Cornerstone Learn</b>	Yes	With this enhancement, when a user taps on a custom banner on the Learner Home page in the Cornerstone Learn app, the user is directed to the associated URL.
<b>Custom Reports - Learning Fields</b>	Yes	With this enhancement, updates and additions have been made to Custom Reporting to allow administrators to report on data related to Express Class.
<b>Certification Usability Enhancements</b>	Yes	<p>With this enhancement, the following updates have been made to Certification functionality:</p> <ul style="list-style-type: none"> <li>○ Certification processes have been optimized on the backend to improve system performance and reduce errors</li> <li>○ Any changes made to the validity period of a certification will trigger the creation of a new version</li> <li>○ Several fields on the Certification Details page have been updated</li> <li>○ A footer has been added to the Certification Details page</li> </ul>
<b>Deep Linking:</b>	Yes	With this enhancement, when a user receives an email containing a deep link for an outdated version of a

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Access to Current Version - Curriculum</b>		curriculum, clicking that deep link redirects the user to the Training Details page of that training. Then, at the top of the page, the user sees a notification message stating that the training is out of date, and the user can click a link to access the latest version.
<b>Express Class (Early Adopter)</b>	Yes	With this Early Adopter enhancement, new Express Class functionality allows facilitators and administrators to quickly and easily document gathered learning after the learning takes place and give credit to the learners, from either a mobile or a desktop device. Express Class will undergo additional enhancement over the next several releases to support additional features and accommodate user feedback.
<b>Learning Compliance Enhancements</b>	Yes	<p>With the October 2018 release, the following Learning Compliance enhancements are available:</p> <ul style="list-style-type: none"> <li>○ Online courses, materials, and videos in a Completed Equivalent status can be launched, so users can always access the latest documents</li> <li>○ Additional custom field types can be audited</li> <li>○ Inactive curricula are excluded from material and online course versioning</li> <li>○ When reverting a material using Versioning with Append, the <b>Start Date</b> time of the new version matches the <b>End Date</b> time of the previous version</li> <li>○ The latest version of a curriculum, material, or online course is automatically assigned when a user is reassigned a previously-removed curriculum, material, or online course.</li> <li>○ A new option is available which allows the learning assignment to override all prior due dates for training contained in the assignment.</li> </ul> <p>The following feature was released in the Sept 7 2018 patch:</p> <ul style="list-style-type: none"> <li>○ Curricula versioning can be applied to dynamic and dynamic recurring learning assignments, and a new filter and column have been added to the Dynamic</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<p>Assignment Details table to identify the assignment type.</p> <p>Additional compliance enhancements will also be released in post-release patches.</p>
<b>PayPal Payment Gateway (Early Adopter) - Refund &amp; Session Support</b>	No	<p>With this enhancement, the PayPal Payment Gateway integration supports transaction management features, eliminating the need to perform additional bookkeeping for refunds. This functionality includes automatic refunds for users who withdraw from sessions.</p> <p>In addition, in a post-release patch, a Tax Calculator integration will be made available for use with PayPal Payment Gateway, allowing organizations to calculate taxes dynamically using Cybersource and accept payments using PayPal.</p>
Workday Transcript Outbound Integration		<b>See Edge Integrate Features for more information.</b>

## Mobile Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Cornerstone Learn Curriculum Support</b>		<p>With a post-release patch, users of the Cornerstone Learn app will be able to launch curricula and view training items inside curricula from their transcripts via the Cornerstone Learn app. Users will also be able to launch and manage the training contained inside curricula on their transcripts.</p>

## Onboarding Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Forms - Before & After Changes for Approvers	Yes	<b>See Cornerstone HR Features for more information.</b>

## Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Custom Reports - Performance Fields</b>	Yes	With this enhancement, a new Reopened field is now available when creating a Performance Review custom report. This field returns a Yes or No value that indicates whether the performance review step was reopened. This field is available in the Performance Review section of the Performance Review custom report.
<b>Development Plan Redesign Enhancements</b>	Yes, when redesigned Development Plans are enabled.	<p><i>This functionality was released with the August 17, 2018 patch.</i> With this enhancement, the following features have been added:</p> <ul style="list-style-type: none"> <li>Redesigned development plans are displayed in the Actions tab of Universal Profile and the corresponding "Your Action Items" Welcome Page widget, if configured in the widget settings.</li> <li>Administrators can use the relative system role "approver" as the approver for redesigned development plans. This is configured in Development Plan Preferences.</li> </ul>
<b>Performance Review Task Administrator Visibility Enhancement</b>	Yes	With this enhancement, administrators can now control which administrators can view and administer each performance review task. This access is managed with a new Performance Review Task - Manage permission and a new Admin Visibility section within the task settings.

## Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Assessment Connector Enhancements	Enable via Edge	<b>See Edge Develop Features for more information.</b>
<b>Candidate Password Reset</b>	Yes	<i>This enhancement was released as part of the 7 September 2018 Patch Release.</i>



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		With this enhancement, recruiters can now reset a candidate's password. This provides an alternative workflow for recovering candidate accounts by allowing users who have the appropriate permission to change the password.
<b>Compliance Update to Flattened Application</b>	Yes	<p><i>This functionality will be available as part of the 9 November 2018 post-release patch.</i></p> <p>With this enhancement, the employer's name, logo (from <b>Corporate Preferences</b>), and address (from <b>the requisition</b>) will be added to all flattened applications (i.e., the PDF version of the application) to support Federal Motor Carrier Safety Administration (FMCSA) compliance requirements.</p>
<b>Custom Fields on Mobile-Friendly Career Site</b>	Yes, after <b>self-enabling Mobile-Friendly Candidate Experience (Early Adopter)</b> on Career Site Management	<p><i>This functionality will not be available in Stage portals at the start of user acceptance testing (UAT) but will be available during the third week of UAT.</i></p> <p>With this enhancement, portals that have enabled Mobile-Friendly Candidate Experience (Early Adopter) can now add Custom Requisition Fields as filters on their mobile-friendly career sites. This lets you have a number of custom filters on your career sites so that candidates can search for jobs based on all of those different types of custom filters, for example, compensation type, salary, experience level, or job function.</p>
<b>First Advantage (FADV) Background Check Enhancements</b>	Enable via Edge	With this enhancement, additional job requisition data will be passed automatically to First Advantage (FADV) so that the data does not need to be entered manually in FADV by the recruiter.
<b>LinkedIn Recruiter System Connect</b>	Enable via Edge	LinkedIn Recruiter System Connect bridges the information gap between Cornerstone Recruiting and LinkedIn Recruiter by making candidate communication, notes, and application information available in both places. With this integration, a recruiter will no longer need to look up a candidate in both systems to get a complete picture of the candidate.
<b>Manage Candidates (Early)</b>	Yes, after <b>self-enabling Manage</b>	With this enhancement, recruiters can now configure the columns on the Manage Candidates page to best suit their needs. This lets individual recruiters customize which columns

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Adopter) – Configurable Columns</b>	<b>Candidates via Feature Activation Preferences</b>	display and the order in which they display.
<b>Mobile-Friendly Career Sites - Support Google Analytics</b>	Yes, after <b>self-enabling Mobile-Friendly Candidate Experience (Early Adopter)</b> on Career Site Management	<p>This enhancement improves the usability of mobile-friendly career sites by allowing support for Google Analytics in advanced headers and footers.</p> <p>As part of this project, Javascript is also supported in advanced headers and footers and will properly reflected in mobile-friendly career sites for portals that are configured to allow Javascript.</p>
<b>Offer Letter Emails: Update to Next Approver and Next Notification Only Approver Recipients</b>	Yes	This enhancement eliminates the duplicate emails that were being sent to certain recipient types of the Offer Pending Approval email.
<b>Optimizing Mobile-Friendly Career Sites for Indexing by Search Engines</b>	Yes, after <b>self-enabling Mobile-Friendly Candidate Experience (Early Adopter)</b> on Career Site Management	With this enhancement, jobs posted to mobile-friendly career sites can now show on Google Jobs and Indeed search engines. Options are added to the Career Site Settings page for mobile-friendly career sites so that administrators can enable the site to be indexed by search engines.
<b>Retirement of Apply with</b>		LinkedIn is sun-setting their current version of Apply with LinkedIn by the end of 2018. Clients who have a LinkedIn Recruiter contract, or a LinkedIn corporate account with active

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
LinkedIn 1.0		LinkedIn job slots, can leverage the new Apply with LinkedIn (With Apply Starters). The new Apply with LinkedIn (With Apply Starters) will only be supported on mobile friendly workflows.
Retirement of Mobile Optimized Career Site Support		Following the October '18 Release, Cornerstone will remove the option "Enable Mobile Site" from the Standard Career Site. To create a mobile supported career site after the October '18 Release, clients will need to create a Mobile-Friendly Career Site on the Career Site Management page. Mobile optimized career sites created prior to the October '18 Release will be able to continue to be used, but Cornerstone will no longer support fixing defects for mobile optimized career sites and when copied, "Enable Mobile Site" will no longer be an option.
Updates to Veteran's Preference Questions	Yes	<i>This enhancement was released as part of the 28 September 2018 Patch Release.</i> A new Veteran Status question is added to Compliance Enablement Preferences. In addition, this enhancement updates the text in the Veteran Status (Part 60-250) question.

## Succession Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Org Chart - Hide Email and Phone Number	Yes	See View Features for more information.

## View Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Org Chart - Hide Email and Phone Number	Yes	<i>This enhancement was released as part of the 7 September 2018 Patch Release.</i> With this enhancement, administrators can hide a user's email and phone number on the user card flyout on the org chart. This feature can be enabled or disabled in Org Chart Preferences.

## New and Enhanced Permissions for October '18 Release

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

### New Permissions

The following permissions are new for the October '18 release:

#### Core

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Absence Management - Absence Home - View	Users with this permission can view the Absence Home page from the Universal Profile. Currently, this permission should only be used by organizations that are using the e-days Absence Management integration. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates.	Limited Use/Obsolete
Connect FTP Folders - Manage	Grants ability to connect to an FTP folder from the FTP Account Access page. This permission can be constrained by FTP Account. When constraining this permission, administrators can select any FTP account that has been associated with the portal. The constraints on this permission determine to which FTP accounts the administrator can connect. This is an administrator permission.	Core
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

#### Learning

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

### [Recruiting](#)

**Note:** The Applicants: Reset Candidate Password *permission* was announced as part of the 7 September 2018 Patch Release.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Reset Candidate Password	Grants ability to change a candidate's password. This permission controls the ability to see the <b>Reset Candidate Password</b> option in the Options drop-down on the Applicant Profile page. The option is only visible to users with this permission. This permission cannot be constrained.	Recruiting

### [Reporting](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - System Templates	Grants users the ability to use all pre-built templates in Reporting 2.0. Pre-built templates are available for generating certain Learning, Core, and Performance data. Users with this permission will also be able to use any new templates that are added in future releases, provided that they still have the permission.  This permission works in conjunction with other Reporting 2.0 permissions. For example, users without the <i>Reporting - Learning - View</i> permission will not see any pre-built templates for Learning.	Reporting

## Enhanced Permissions

The following existing permissions are enhanced for the October '18 release:

### [Engage](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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View Engage Reporting With the February 2019 release, this permission name changes to "Engage - View".	Grants access to the Campaign Dashboard. The constraints on this permission control what data is visible to the user on the Campaign Dashboard. This permission can be constrained by OU, User's OU, User Self And Subordinates, User's Direct Subordinates, User's Corporation, User's Employee Type, Employee Type. The data that is visible on the dashboard is controlled by the constraints set on the permission.	Engage With the February 2019 release, this category changes to "Engage - Administration".
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[Learning](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	<p>Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.</p> <p>With the Dec 14 2018 and Jan 4 2019 patches, administrators with this permission will be able to remove the following training types in the following additional transcript statuses:</p> <p>For sessions:</p> <ul style="list-style-type: none"> <li>○ Cancelled</li> <li>○ Incomplete</li> <li>○ No Show</li> </ul> <p>For On the Job Training:</p> <ul style="list-style-type: none"> <li>○ Pending OJT Completion (applicable to On the Job Training)</li> </ul> <p>For events:</p> <ul style="list-style-type: none"> <li>○ Not Started (only for events )</li> </ul> <p>For training delivered by Express Class in a status of Incomplete:</p> <ul style="list-style-type: none"> <li>○ Incomplete</li> </ul>	Learning - Administration

## Master List of New Report Fields for October '18 Release

This page provides the master list of new report fields for the October '18 release.

### [Core](#)

FIELD NAME	SECTION	CUSTOM REPORT NAME
Group	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Group Owner	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Group Parent	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Group Active	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Group Description	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Group ID	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession,



FIELD NAME	SECTION	CUSTOM REPORT NAME
		Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Group Owner Ref	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Group Parent Ref	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User
Freeze Group Processing	User	Certification, Compensation, Competency, Compliance, Development Plan, Evaluations, Forms, Goals, Multi-Module, Observation Checklist, Onboarding, Performance, Performance Review, Recruiting, Resume, Succession, Talent Pool, Test, Training Form Task, Training Form, Training Plan, Transaction, Transcript, User

#### Learning

FIELD NAME	SECTION	CUSTOM REPORT NAME
Is Express Class?	Transcript	Assignment Report, Compliance Report, Curriculum Transcript Report, Multi-Module Report, Transaction Report, Transcript Report
Observed Training Result	On the Job Training & Express Class	Transcript Report, Multi-Module Report

#### Performance

FIELD NAME	SECTION	CUSTOM REPORT NAME
Reopened	Performance Review	Performance Review



## Release Notes Updates

The following changes have been made to the release notes since they were initially published:

[Changes made on 11 December 2018](#)

### Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Forms Before & After Changes for Approvers	Forms Before & After Changes for Approvers	Additional information was added to the topic, such as use cases, conditions, and implementation information. In addition, the image was updated.

[Changes made on 9 November 2018](#)

### Edge

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
ADP Workforce Now Single Sign-On (SSO)	ADP Workforce Now Single Sign-On (SSO)	Updated the availability to indicate that this enhancement will be available in a post-release patch.

[Changes made on 26 October 2018](#)

### Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Custom Reports - User Fields	Custom Reports - User Fields	Updated Freeze Group Processing field to note that this is a Yes/No field, not a Text field.
FTP Folder Access	FTP Folder Access FTP Account Access FTP Account	Updated the availability to indicate that this functionality is available in Stage portals as of October 24, and it will be available in Pilot and Production portals in a post-release patch.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Password Reset	

## Edge

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ultimate Software's UltiPro Core Data Inbound Integration Enhancements	Ultimate Software's UltiPro Core Data Inbound Integration Enhancements	Updated the availability to indicate that this enhancement will be available in a post-release patch.
Ultimate Software's UltiPro Single Sign-On (SSO)	Ultimate Software's UltiPro Single Sign-On (SSO)	Updated the availability to indicate that this enhancement will be available in a post-release patch.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Deep Linking - Access to Current Version - Curriculum	<ul style="list-style-type: none"> <li>Deep Linking - Access to Current Version - Curriculum</li> <li>Deep Linking - Redirect to Current Version</li> </ul>	Made additions to both topics to explain that the notification for a new version of a curriculum only displays to a user if the current version of the curriculum is already on the user's transcript. The notification also displays to users when they access the Training Details page from their transcript, if a newer version of the curriculum exists on their transcript.
Express Class (Early Adopter)	<ul style="list-style-type: none"> <li>Express Class (Early Adopter) - Overview</li> <li>Create Express</li> </ul>	<ul style="list-style-type: none"> <li>Added the tagline "Gathered Learning Capture Tool" to Express Class Overview topic.</li> <li>Added the following information: The navigation link for Express Class is visible by default to users with the permission to manage Express Class.</li> <li>Deleted reference to Location field, as this field is not</li> </ul>

<b>ENHANCEMENT NAME</b>	<b>NAME OF UPDATED TOPIC</b>	<b>PURPOSE OF CHANGE</b>
	Class - General Information	available with the October release.
Learning Compliance Enhancements	<ul style="list-style-type: none"> <li>Learning Compliance Enhancements Overview</li> <li>Exclude Curricula from Versioning</li> <li>Compliance Enhancements - Training Removal Tool</li> </ul>	<ul style="list-style-type: none"> <li>Updated both topics to note that the Exclude Inactive Curricula from Versioning enhancement has been removed from the October release and will be released in a future patch, the date of which is yet to be determined.</li> <li>Updated Overview topic to note that the Not Started status will be included in the enhancements for the Training Removal Tool when it is released.</li> <li>Added update to Bulk Training Removal - Manage permission specifying which training types and transcript statuses can be removed.</li> </ul>
PayPal Payment Gateway (Early Adopter) Enhancements	PayPal Payment Gateway (Early Adopter) Enhancements	Updated overview to note that the Tax Calculator integration enhancement which can be used to dynamically calculate taxes on PayPal transactions will be released with the Nov 9 2018 patch.

## Performance

<b>ENHANCEMENT NAME</b>	<b>NAME OF UPDATED TOPIC</b>	<b>PURPOSE OF CHANGE</b>
Performance Review Task Administrator Visibility Enhancement	Performance Review Task Administrator Visibility Enhancement	<p>Updated the Performance Review Task - Manage permission description to reflect that the permission constraints limit who can be added to the task. The constraints do not limit who can be viewed within the View Details page for the task.</p> <p>Updated the description on the Performance Review</p>

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Performance Review Task Administration - Admin Visibility  Performance Review Task - Set Admin Visibility	Task Administration - Admin Visibility topic to remove the text that previously indicated that constraints on the Performance Review Task - Manage permission determine which users are visible within the task.

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Compliance Update to Flattened Application	Compliance Update to Flattened Application	<i>This functionality will be available as part of the 9 November 2018 post-release patch.</i>  With this enhancement, the employer's name, logo (from <b>Corporate Preferences</b> ), and address (from <b>the requisition</b> ) will be added to all flattened applications (i.e., the PDF version of the application) to support Federal Motor Carrier Safety Administration (FMCSA) compliance requirements.
Custom Fields on Mobile-Friendly Career Site	Custom Fields on Mobile-Friendly Career Site Overview	Updated the implementation date for Stage portals from the third week of UAT to the first week of UAT.
LinkedIn Recruiter System Connect	LinkedIn Recruiter System Connect Overview	<i>This functionality will be available as part of the 9 November 2018 post-release patch.</i>  Added important permission constraints information to the Considerations/Exclusions section. Specifically, indicated that the permission constraints in Cornerstone that limit which requisitions/applicant information a recruiter has access to, are not reflected in LinkedIn Recruiter with the LinkedIn Recruiter System Connect integration before the November 9 2018 patch

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		release.
LinkedIn Recruiter System Connect	Frequently Asked Questions - LinkedIn Recruiter System Connect	Added information about how Notes and InMails from LinkedIn are attributed to recruiters in Cornerstone.  Added information to indicate that the proper profile will be mapped to the right candidate if an incorrect LinkedIn profile is displayed on the "LinkedIn" tab of the Applicant Profile page.
Manage Candidates (Early Adopter) Configurable Columns	Manage Candidates Page - Set Default Filters	<i>This functionality will be available in a post-release patch.</i>  This is a new feature that lets you configure default filter settings on the Manage Candidates page.
Mobile-Friendly Career Sites Support Google Analytics	Mobile-Friendly Career Sites Support Google Analytics	This is a new enhancement for the October '18 release. This enhancement improves the usability of mobile-friendly career sites by allowing support for Google Analytics in advanced headers and footers. As part of this project, Javascript is also supported in advanced headers and footers and will properly reflected in mobile-friendly career sites for portals that are configured to allow Javascript.

Changes made on 12 October 2018:

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
FTP Folder Access	<ul style="list-style-type: none"> <li>FTP Folder Access</li> <li>FTP Account Access</li> <li>FTP Account Password Reset</li> </ul>	Updated the availability to indicate that this enhancement will be available in a post-release patch.
Welcome Page Preferences - Remove Customization Option	Welcome Page Preferences - Remove Customization Option Welcome Page	Clarified where the Remove Customization link should appear on the page and updated images.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Preferences	

## Edge

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ultimate Software's UltiPro Core Data Inbound Integration Enhancements	Ultimate Software's UltiPro Core Data Inbound Integration Enhancements	Updated the topic title.
Ultimate Software's UltiPro Single Sign-On (SSO)	Ultimate Software's UltiPro Single Sign-On (SSO)	Updated the topic title.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Certifications Usability Enhancements	Certification Details - In Progress	Added the following note for new fields added for certifications in a Certified status: <b>Note:</b> <i>These enhancements do NOT apply to certifications in a Certified (Renewal in Progress) status.</i>
Custom Banner Link in Cornerstone Learn	Custom Banner Links in Cornerstone Learn	Added new enhancement: Custom Banner can be used as a link in the Cornerstone Learn app. <b>See Custom Banner Links in Cornerstone Learn</b> on page 327 <i>for additional information.</i>
Express Class (Early Adopter)	Create Express Class - General	Updated topic to state that predictive training search results are limited to ten results.

## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Performance Review Task Administrator	Performance Review Task Administrator	Added a note to indicate that this functionality is available in Stage

<b>ENHANCEMENT NAME</b>	<b>NAME OF UPDATED TOPIC</b>	<b>PURPOSE OF CHANGE</b>
Visibility Enhancement	Visibility Enhancement Performance Review Task Administration - Admin Visibility Performance Review Task - Set Admin Visibility	portals as of October 9.

## Recruiting

<b>ENHANCEMENT NAME</b>	<b>NAME OF UPDATED TOPIC</b>	<b>PURPOSE OF CHANGE</b>
First Advantage (FADV) Background Check Enhancements	First Advantage (FADV) Background Check Enhancements	Added note to Implementation section to indicate that this functionality is targeted to be available in Stage portals with the October 11 Stage deployment.
LinkedIn Recruiter System Connect	Applicant Profile - LinkedIn Recruiter System Connect	Added information to the InMail History section to explain how a candidate record can be created when a LinkedIn recruiter sends an InMail to a candidate.

## Reporting 2.0

<b>ENHANCEMENT NAME</b>	<b>NAME OF UPDATED TOPIC</b>	<b>PURPOSE OF CHANGE</b>
Reporting 2.0 (Early Adopter)	General Enhancements	Added the list of redundant Reporting 2.0 permissions that are being removed.

## 4 January Patch Release Functionality

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## What's New for the 4 January 2019 Patch Release

The following is released along with the 4 January 2019 patch release:

MODULE	FEATURE	DESCRIPTION
Core/Edge	Ultimate Software's UltiPro Single Sign-On (SSO)	The UltiPro Single Sign-On integration allows organizations to provide a seamless experience to their employees via Single Sign-On (SSO). Simply set up an outbound data feed from UltiPro to Kronos or the UltiPro Core Data Inbound Integration and enable this integration to allow your employees to log in to Cornerstone from UltiPro.
Core/Edge	Workday Core Data Inbound Integration Enhancements	With this enhancement, the Workday Core Data inbound integration in Edge can now use Workday Eligibility Criteria to filter which users' data is sent to the Cornerstone system.
Learning	Learning Compliance Enhancements - Learning Assignment Tool Enhancements	With this enhancement, the following training behaviors have been updated: <ul style="list-style-type: none"> <li>○ The Assign New Occurrence setting pushes the assignment training every time users enter the dynamic assignment criteria. Users who enter the assignment availability with previous version on their transcripts will continue to receive the latest version of the training.</li> <li>○ A new option enables users to maintain their progress on all assigned training, provided the assignment was created with the <b>Assigned, Approved, and Registered</b> option selected. <b>Note:</b> <i>This was made possible for curriculum training types with the Aug '18 release. With this patch, users can maintain progress on all training types.</i></li> <li>○ Curriculum reassignment provides users with the latest version of all child training contained within the curriculum.</li> </ul>
Recruiting	Apply with LinkedIn 1.0 Retirement	As a reminder, LinkedIn is retiring the previous version of Apply with LinkedIn at the end of 2018. LinkedIn has communicated that the final deprecation will happen by January 11 and will be rolled out gradually. Clients who have a

MODULE	FEATURE	DESCRIPTION
		<p>LinkedIn Recruiter contract, or a LinkedIn corporate account with active LinkedIn job slots, can leverage the new Apply with LinkedIn (With Apply Starters). The new Apply with LinkedIn (With Apply Starters) will only be supported on mobile friendly workflows. Find out more about Apply with LinkedIn (With Apply Starters).</p> <p>To ensure candidates do not experience an Apply with LinkedIn button that does not work on their applications, Cornerstone will automatically disable the old Apply with LinkedIn for all clients, effective with the January 4 patch.</p>
Recruiting	Increased File Size Limit on Additional Attachments	<p>Prior to this enhancement, the file size limit for additional attachments on mobile-friendly application workflows was 5 MB. This file size was too small to accommodate large attachments.</p> <p>With this enhancement, the file size has been increased to 10 MB. This allows candidates to upload larger attachments to their applications.</p>
Recruiting	Tracker I-9 Integration Usability Enhancement	<p>Prior to this enhancement, some new hires could not complete their I-9 forms within the Tracker I-9 integration. As a result, the I-9's were being completed outside the system in order to maintain compliance.</p> <p>With this enhancement, fewer defects should occur so that new hires can complete the form within the Tracker I-9 integration.</p>

## Core

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## Ultimate Software's UltiPro Single Sign-On (SSO)

The Ultimate Software's UltiPro Single Sign-On (SSO) integration allows organizations to provide a seamless experience to their employees via Single Sign-On (SSO). Simply set up an outbound data feed from UltiPro to Kronos or the UltiPro Core Data Inbound Integration and enable this integration to allow your employees to log in to Cornerstone from UltiPro.

### Integration Settings

When configuring the UltiPro Single Sign-On integration, organizations must provide their UltiPro Client ID. This value can be obtained by contacting the Ultimate Software Account Manager.

### Implementation

The UltiPro Single Sign-On integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This integration is available to all organizations. Organizations must have an existing UltiPro contract. Organizations that have an existing SSO integration from UltiPro to Cornerstone do not need to install this integration or migrate.

### Security


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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Workday Core Data Inbound Integration Enhancements

Prior to this enhancement, organizations using the Workday Core Data inbound integration in Edge could not control which user records were sent to the Cornerstone system.


With this enhancement, the Workday Core Data inbound integration in Edge can now use Workday's Eligibility Criteria to filter which user records are sent to the Cornerstone system.

[Back](#)

Workday Core Data Inbound Integration
Release

Uninstall and Remove Integration

[Settings](#)
[Transaction History](#)
[Getting Started](#)

Please fill in the fields below to configure your integration.


**Setup Instructions**

Workday Tenant URL \*

Integration System User Username \*

Integration System User Password \*

Notification Email \*

Location Hierarchy

Employee Type Custom OU Choose one ▼

☐ Enable Eligibility Criteria Data (If enabled, please populate the Eligibility Criteria configuration fields)

Eligibility Criteria System ID

Eligibility Criteria Field Override Service Name

Eligibility Criteria Field Name

☐ Full Sync

☐ Delta Sync

OU Mapping

OU Type	Workday OU Type	Workday OU Hierarchy	Remove
<div>+ Add New OU Mapping</div>			

Custom OU Mapping

Custom OU Type	Custom Workday OU Type	Remove
<div>+ Add New Custom OU Mapping</div>		

Additional Field Mapping

Field Name	Workday Integration System ID	Workday Integration Field Override	Remove
<div>+ Add New Additional Field Mapping</div>			

Custom Field Mapping

Field Name	Workday Integration System ID	Workday Integration Field Override	Remove
<div>+ Add New Custom Field Mapping</div>			

Save Settings

## Resources

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The following resources are available. Select a link to access that resource in the Success Center.

- [Workday Migration Resources](#)
- [Workday Core Data Inbound Integration Starter Guide](#)
- [Workday Office Hours](#)

## Implementation

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It is recommended to implement the integration on your test environment prior to production environment.

The integration is available to install in the Edge Marketplace for a fee.

For organizations that are using the previously existing, legacy Workday Core Data Inbound integration, enablement information is available in the Resources section above.

For new integrations, this integration is available for self-activation via Edge Marketplace and Integrations. Organizations must have an existing contract with Workday. Starter Guides and Migration instructions are included with the integration in Edge Marketplace.

## Security

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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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Learning

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## Learning Compliance Enhancements - Learning Assignment Tool Enhancements

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## Learning Compliance Enhancements - Learning Assignment Tool - Overview

With this enhancement, the following training behaviors have been updated:

- The Assign New Occurrence setting pushes the assignment training every time users enter the dynamic assignment criteria. Users who enter the assignment availability with previous version on their transcripts will continue to receive the latest version of the training.
- A new option enables users to maintain their progress on all assigned training, provided the assignment was created with the **Assigned, Approved, and Registered** option selected. **Note:** *This was made possible for curriculum training types with the Aug '18 release. With this patch, users can maintain progress on all training types.*
- Curriculum reassignment provides users with the latest version of all child training contained within the curriculum.

## Implementation

This functionality was automatically enabled in all Stage portals using the Learning module on Nov 30, 2018, and this functionality is automatically enabled in all Production portals using the Learning module with the Jan 4, 2019 patch.

## Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Dynamic Reassignment	Grants ability to enable/disable Dynamic Re-assignment for an assignment after submission. When Dynamic Re-assignment is enabled, users that meet the User Criteria again (after previously being dynamically removed) are re-assigned. This permission is dependent on the Assignment - Standard, Dynamic - Standard and Dynamic, and Dynamic Assignment - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

## Compliance Enhancements - LAT

The behaviors of some fields available during the Learning Assignment Tool creation process have been updated, and new options are also available.

To begin creating a new learning assignment, go to **ADMIN > TOOLS > LEARNING** and click the **Assignment Tool** link. From the Manage Learning Assignments page, click the **CREATE ASSIGNMENT** button.

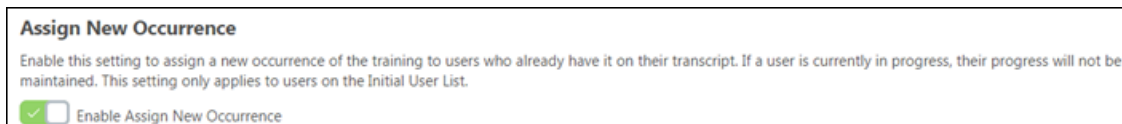
### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Dynamic Reassignment	Grants ability to enable/disable Dynamic Re-assignment for an assignment after submission. When Dynamic Re-assignment is enabled, users that meet the User Criteria again (after previously being dynamically removed) are re-assigned. This permission is dependent on the Assignment - Standard, Dynamic - Standard and Dynamic, and Dynamic Assignment - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

## Assign New Occurrence

The **Enable Assign New Occurrence** setting has been updated to push the assignment training EVERY time users enter the dynamic assignment criteria. Users who enter the assignment availability with previous version on their transcripts will continue to receive the latest version of the training.

Example: Lauren from the Sales division at the California office receives the Sales Curriculum from a dynamic learning assignment that assigns training to sales employees in California. The next year, Lauren transfers to the Arizona office and no longer meets the availability of the Sales Curriculum assignment. However, after a few months, Lauren transfers back to the California office and once again meets the criteria of the assignment, and because the Assign New Occurrence option is enabled for the assignment, Lauren receives the latest version of the Sales Curriculum on her transcript.

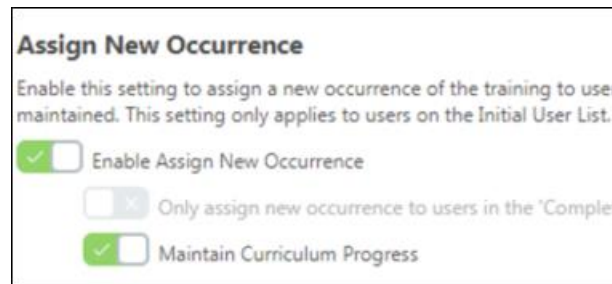


## Maintain Curriculum Progress

If the **Enable Assign New Occurrence** setting is turned on, an additional option is available, which allows users to maintain their curriculum progress when they are assigned

a new occurrence of the same version of a curriculum on their transcript. To allow users who receive new occurrences of the curriculum to maintain their curriculum progress on that version, toggle the **Maintain Curriculum Progress** option to the On (green) position. If this option is not enabled, users who receive new occurrences of a curriculum via the learning assignment will NOT retain their curriculum progress. **Note:** *The **Maintain Curriculum Progress** option is ONLY available if the following conditions are met:*

- *The administrator has selected the **Assigned, Approved, and Registered** option on the Options step of the learning assignment creation process.*
- *The Only Assign New Occurrence to Users in the Completed Status option is NOT selected.*



## Override All Prior Due Dates

If the **Enable Assign New Occurrence** setting is turned on, an additional option is available which allows the learning assignment to override all prior due dates for training contained in the assignment. This means that if a user already has the assignment training on their transcript and then they receive a new occurrence of the training, the due date of the new assignment will override the due date(s) of the previous instance of the training on the user's transcript. To allow the assignment to override previous due dates, toggle the Override All Prior Due Dates switch to the On (green) position.

**Note:** *This setting does not override the due date that displays for child training that viewed from inside the Curriculum Details page when the due date for a child training item is updated.*



## Recruiting

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## Apply with LinkedIn 1.0 Retirement

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As a reminder, LinkedIn is retiring the previous version of Apply with LinkedIn at the end of 2018. LinkedIn has communicated that the final deprecation will happen by January 11 and will be rolled out gradually. Clients who have a LinkedIn Recruiter contract, or a LinkedIn corporate account with active LinkedIn job slots, can leverage the new Apply with LinkedIn (With Apply Starters). The new Apply with LinkedIn (With Apply Starters) will only be supported on mobile friendly workflows. Find out more about Apply with LinkedIn (With Apply Starters).

To ensure candidates do not experience an Apply with LinkedIn button that does not work on their applications, Cornerstone will automatically disable the old Apply with LinkedIn for all clients, effective with the January 4 patch.

After the January 4 patch:

- The old **APPLY WITH LINKEDIN** button will not be visible anywhere. This includes all career sites and applications.
- The **Allow Apply with LinkedIn** checkbox will only appear in career site settings if Apply With LinkedIn (With Apply Starters) is enabled.

In addition, client's will see the following changes in Edge after the January 4 patch:

- The old Apply with LinkedIn widget will be removed from the Edge Marketplace.
- The enablement line item will be removed from all client's Edge integrations.

## Increased File Size Limit on Additional Attachments

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Prior to this enhancement, the file size limit for additional attachments on mobile-friendly application workflows was 5 MB. This file size was too small to accommodate large attachments.

With this enhancement, the file size has been increased to 10 MB. This allows candidates to upload larger attachments to their applications.

### Implementation

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This functionality is automatically available for all organizations using Recruiting, provided that you have self-enabled the Mobile-Friendly Candidate Experience. [See \*Enable Mobile-Friendly Candidate Experience\*](#).

## Tracker I-9 Integration Usability Enhancement

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Prior to this enhancement, some new hires could not complete their I-9 forms within the Tracker I-9 integration. As a result, the I-9's were being completed outside the system in order to maintain compliance.

With this enhancement, fewer defects should occur so that new hires can complete the form within the Tracker I-9 integration.

### Implementation

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This enhancement is available for all portals with Tracker I-9 enabled and activated. Should you experience a defect with a new hire being able to complete the I-9 form within Tracker, submit a ticket to Global Product Support.



## 14 December Patch Release Functionality

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## What's New for the 14 December 2018 Patch Release

The following is released along with the 14 December 2018 patch release:


MODULE	FEATURE	DESCRIPTION
Core	Marketing Communications Enhancement - Ability to View Marketing Email Modification History	With this enhancement, a new Question Mark icon is now available in the Options column when viewing the Marketing Communications page. Administrators can select this icon to view the modification history of the marketing email or template.
Core	Workday Core Data Inbound Integration Enhancements	The Workday Core Data inbound integration now supports the configuration of User Record Custom Text Fields.
Cornerstone HR	Forms Before and After	With this enhancement, when a form approver is reviewing a form that has updated values, they can see the current value next to the submitted value.
Learning	Learner Home Enhancements	With this enhancement, the Machine Learning Platform training request count has been increased from 200 to 500. This helps to ensure learners receive the maximum number of recommended training items in each Learner Home carousel.
Learning	Learning Compliance Enhancements - Additional Statuses Added to Training Removal Tool	Following this enhancement, administrators can use the Training Removal Tool to remove sessions the following <b>additional</b> transcript statuses: <ul style="list-style-type: none"> <li>○ Incomplete</li> <li>○ Cancelled</li> <li>○ No Show</li> <li>○ Not Started</li> <li>○ Pending OJT Completion</li> </ul>
Learning	Update to Transcript Status for completed sessions with required Pre-Work	With this enhancement, when a session with required pre-work is marked complete by the administrator submitting the roster, users' transcript statuses will display as Pending Pre-work. After completing the required pre-work, users will receive a Completed status for the

MODULE	FEATURE	DESCRIPTION
		session.
Mobile/Learning	Cornerstone Learn Curriculum Support: View Child Items within Curriculum while Browsing	<p>With this enhancement, users can do the following with the Cornerstone Learn app:</p> <ul style="list-style-type: none"> <li>○ View child training items within a curriculum that is not on their transcript.</li> <li>○ Take action on child training within a curriculum even if the curriculum is not on their transcript.</li> <li>○ View the full curriculum structure, provided the training types are supported by the Cornerstone Learn app.</li> </ul>
Performance	Display Shared Goal Owner	With this enhancement, goal contributors can see who owns their shared goals because the goal owner is now visible for shared goals from the My Goals, Team Goals, and Snapshot pages.
Performance	Goals Respect Owner's Preferences and Configurations	With this enhancement, the goal owner or goal assignee's Goal Preferences and Goal Configurations may be applied in Universal Profile Snapshot, Goals, and Goal Rating steps within performance reviews. Shared goals respect the goal owner's preferences and configurations.
Recruiting	LinkedIn Recruiter System Connect	This enhancement fixes an issue that was preventing InMail and notes from LinkedIn from appearing in Cornerstone. In some cases, the email addresses of LinkedIn Recruiter System Connect users are not being passed from LinkedIn to Cornerstone. To address this issue, administrators will be able to manually identify which Cornerstone users should be associated with seats in LinkedIn Recruiter.

## Core

---

## Marketing Communications Enhancement - Ability to View Marketing Email Modification History

With this enhancement, a new Question Mark icon  is now available in the Options column when viewing the Marketing Communications page. Administrators can select this icon to view the modification history of the marketing email or template.

For each modification, the modification history displays the name of the administrator who modified the email or template and the date and time at which the email or template was modified.




This enhancement is available as of the 30 November, 2018 patch.

Marketing Communications

Create New Email

« Previous1-1 of 1Next »




Sent Emails

TITLE	CREATED BY	CREATE DATE	SEND DATE	STATUS	OPTIONS
Mandatory Online Training	Tasha Shore	2/26/2014	2/26/2014	Sent	  

Create Email Template

« Previous1-1 of 1Next »

Email Templates

TITLE	CREATED BY	CREATE DATE	OPTIONS
Mandatory Training	Tasha Shore	3/3/2014	  

### How Does this Enhancement Benefit My Organization?

This functionality enables organizations to view who has recently modified a marketing email or template and when the modifications took place.

### Implementation

This functionality is automatically enabled for all organizations.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Marketing Email Templates - Manage	Grants ability to create and save Marketing Email Templates, which can be reused to send future marketing email messages to users. This is an administrator permission.	Core Administration
Marketing Emails - Manage	Grants ability to create and send ad hoc emails to populations of users based on their assigned org	Core Administration

units, groups, or by user name. This is an administrator permission.	
--	--

## Workday Core Data Inbound Integration Enhancements

The Workday Core Data inbound integration now supports the configuration of User Record Custom Text Fields.

Organizations using the existing standard Cornerstone-Workday Cloud Connect integration must migrate to this Edge-ready integration before Workday deprecates the existing integration in 2019. [See Retirement of Current Workday Integration in March 2019](#) on page 188 *for additional information*.

### Implementation

It is recommended to implement the integration on your test environment prior to production environment.

For new integrations, this integration is available for self-activation via Edge Marketplace and Integrations. Organizations must have an existing contract with Workday. Starter Guides and Migration instructions are included with the integration in Edge Marketplace.

Prior to January 1, 2019, this integration will be available in the Edge Marketplace for free to install. Cornerstone recommends existing clients who currently have a Workday integration to log into the Edge Marketplace in their Production, Stage, and Pilot environments and click “Install” prior to January 1. After clicking install, the integration can be set up after January 1 and prior to the Workday integration deprecation.

On and after January 1, 2019, the integrations will only be available to install in the Edge Marketplace for a fee.

### Security

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Cornerstone HR

---



## Forms - Before & After Changes for Approvers

Before this enhancement, form approvers had to search other areas of the system to find the previous value for the change that they were asked to approve.

With this enhancement, when a form approver is reviewing a form that has updated values, they can see the current value next to the submitted value.

Division Change for Marissa Andrews

Options ▾

This is to be completed by the manager at least one week prior to the employee division change.

\* = Submitted field value has been changed from current value.

	Current Value	Submitted Value
First Name	Marissa	Marissa
Last Name	Andrews	Andrews
*Position	Associate	Manager (Manager)
*Division	Sales	Acme (Acme)

Approval Comment (optional)

Cancel

Deny

Deny and Return

Approve

## How Does this Enhancement Benefit My Organization?

This enhancement ensures that employee data is accurate and traceable, which is a vital part of the forms data collections process. Displaying current data next to changed data allows clients to easily see changes before approving a form.

## Use Cases

1. Heather in HR approves internal transfers for Acme Corp.
2. Ernie, a Sales Manager at Acme Corp, is transferring from Chicago, Illinois to Paris, France. As part of his move, he completed all his company's internal transfer documents.
3. Heather can see that Ernie currently lives in Chicago and is moving to Paris, so she does not approve Ernie's form until he completes his Visa documentation.

## Considerations

---

- This enhancement applies only to forms with approval workflows.
- This enhancement applies to both effective dated and non-effective dated forms.
- Changes that happen between form submission and form approval are reflected on the form's before/after snapshot.
- The "Changed From" and "Changed To" fields only appear if there is a change to approve.

The lists below display the fields that can display the "Current" and "Submitted" values.

### **Non-effective dated (ED) form fields that can display "Current" values**

- User Standard Fields
  - Checkbox
  - Radio buttons
  - Date fields
  - Drop-down
  - Encrypted short text box
  - Numeric
- User Custom Fields
  - Short text
  - Checkbox
  - Radio buttons
  - Date fields
  - Drop-down
  - Scrolling text box
  - Multi-checkbox
  - Numeric
- Organizational Units (OUs)
  - Standard OUs
  - Custom OUs
- Employee Relationships (ERs)
  - Standard
  - Custom

### **Question Bank Fields**

- Checkbox
- Date Picker
  - Month/Year
  - Month/Day/Year
- Dropdown
  - Single Select
  - Multi Select
- Text

- Small
- Medium
- Large
- Multiline
- Numeric
- Radio

**Note:** Attachment fields will not display a "Current" value in non-ED forms.

### **Effective Dated Form Fields that can Display "Current" Values**

- User Standard Fields
  - Custom
- User Custom Fields
  - Short text
  - Checkbox
  - Radio Buttons
  - Drop-down
  - Scrolling text box
  - Multi-checkbox
  - Numeric
- Organizational Units (OUs)
  - Custom OUs
- Employee Relationships (ERs)
  - Standard
  - Custom

**Note:** Attachment and Question Bank fields will not display a "Current" value in ED forms.

### **Implementation**

---

This functionality is automatically enabled for all organizations using Forms.

## Learning

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## Cornerstone Learn

---

## Cornerstone Learn Curriculum Support: View Child Items within Curriculum while Browsing - Overview

---

Prior to this enhancement, when using the Learn app, users were not able to view child training within a curriculum when browsing through the Learning Search page or Learner Home. Users could only view basic details for the curriculum, such as the description and provider.

With this enhancement, users can do the following with the Cornerstone Learn app:

- View child training items within a curriculum that is not on their transcript.
- Take action on child training within a curriculum even if the curriculum is not on their transcript.
- View the full curriculum structure, provided the training types are supported by the Cornerstone Learn app.

## Use Case

---

Sam is a learner who has recently downloaded the Cornerstone Learn mobile app to search for training. She logs in and browses through Learner Home and finds an interesting curriculum about Change Management. Sam navigates to the details of the curriculum and is able to browse through the one material and two online classes offered as part of the curriculum. She finds one of the online classes interesting, so requests only that online class from within the curriculum.

## Considerations

---

This enhancement applies to both the iOS and Android versions of the Cornerstone Learn app.

This enhancement does NOT apply to the legacy Cornerstone Mobile app.

## Exclusions

---

The following exclusions apply to this enhancement:

- Training cannot be activated within a curriculum using the Cornerstone Learn app.
- Curriculum Administration is not supported by the app.
- Training types that are not supported by the app cannot display in the curriculum structure in the app.

## Implementation

---

This functionality is automatically available to all users of the Cornerstone Learn app.

## Cornerstone Learn - View Curricula

When a user navigates to Learning Search or Learner Home within the Cornerstone Learn app, the user can access the Curriculum Details page for the curriculum and both view and take action on child training items contained within the curriculum, even if the curriculum itself is not on their transcript.



## Curriculum Courses

When a user taps a curriculum within the Cornerstone Learn app, they are navigated to the Curriculum Details page for the curriculum, which contains two tabs: Details and Courses.

To view the structure of the curriculum and the training contained in the curriculum, tap the Courses tab.

## Courses

---

On the Courses tab, each section of the curriculum displays. The user can view the full curriculum structure, provided all the child training within the curriculum is supported by the Cornerstone Learn app.

The user can tap a section to view the child training items contained in that section. If a section of the curriculum has already been completed by the user, the section shows a status of Completed. If the section has not been completed, no progress information displays. Even if the curriculum is not on the user's transcript, the user can perform available actions on the training contained within the curriculum, such as requesting the training.

The following supported training items can be accessed from within a curriculum:

- Online Courses
- Materials
- Videos

The following information displays for each child training item:

- Training Title
- Training Type (i.e. online course, material, video)
- Image Thumbnail

If a child training item within a curriculum is already on the user's transcript, when the user views the child training from within the curriculum, a message displays with the training stating, "This item is already on your transcript."

**Note:** *The curriculum structure respects the Mobile Enabled filter, meaning that if this filter is enabled, the user will only see mobile-enabled training on the Courses page.*



## Learner Home Enhancements

---

With this enhancement, the Machine Learning Platform training request count has been increased from 200 to 500. This helps to ensure learners receive the maximum number of recommended training items in each Learner Home carousel.

## Considerations

---

This enhancement is NOT a change to the maximum number of training items that display in the Learner Home carousels.

## Implementation

---

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

## Learning Compliance Enhancements - Additional Statuses Added to Training Removal Tool

Prior to this enhancement, administrators were unable to remove instructor-led training (ILT) sessions which were in the following statuses:

- Incomplete
- No Show
- Not Started
- Pending OJT Completion

Following this enhancement, administrators can use the Training Removal Tool to remove sessions the following transcript statuses:

- Incomplete (applicable to sessions and Express Class training)
- No Show (applicable to sessions)
- Not Started (applicable to events)
- Pending OJT Completion (applicable to On the Job Training items)

### Implementation

This functionality is automatically enabled in all portals using the Learning module with the Dec 14, 2018 patch.

To create a new training removal job, go to **ADMIN > TOOLS > LEARNING > TRAINING TOOLS > TRAINING REMOVAL TOOL**. Then, click the **Create New Training Removal Job** link. Advance to the Status step to select the transcript statuses the Training Removal Tool can remove from users' transcripts.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	<p>Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.</p> <p>With the Dec 14 2018 and Jan 4 2019 patches, administrators with this permission will be able to remove the following training types in the following additional transcript statuses:</p> <p>For sessions:</p> <ul style="list-style-type: none"> <li>○ Cancelled</li> <li>○ Incomplete</li> </ul>	Learning - Administration

	<ul style="list-style-type: none"> <li>○ No Show</li> </ul> <p>For On the Job Training:</p> <ul style="list-style-type: none"> <li>○ Pending OJT Completion (applicable to On the Job Training)</li> </ul> <p>For events:</p> <ul style="list-style-type: none"> <li>○ Not Started (only for events )</li> </ul> <p>For training delivered by Express Class in a status of Incomplete:</p> <ul style="list-style-type: none"> <li>○ Incomplete</li> </ul>	
--	---	--

## Status

Using the Training Removal Tool, training in the following transcript statuses can be removed from users' transcripts:

- Approved
- Denied
- Incomplete (new)
- In Progress
- No Show (new)
- Pending Approval
- Pending OJT Completion (new)
- Pending Payment
- Registered
- Withdrawn

*See [Training Removal Job - Create - Step 3 - Status](#) for more information about the Status step of creating a training removal job.*

## Update to Transcript Status for Completed Sessions with Required Pre-work

---

Prior to this enhancement, when an instructor-led training (ILT) session with required pre-work was marked complete by the administrator submitting the roster, users enrolled in the session would display an In Progress status for the session on their transcripts. This did not make it clear to the user that they needed to complete the required pre-work associated with the session.

Following this enhancement, when a session with required pre-work is marked complete by the administrator submitting the roster, users' transcript statuses will display as Pending Pre-work. After completing the required pre-work, users will receive a Completed status for the session.

### Considerations

---

- If the due date for a user's ILT session has passed, and the user has completed the session but NOT the required pre-work for the session, the user's transcript status is Pending Pre-work/Past Due.
- If a user is added to a session with a Completed status, any pre-work requirements for the session are bypassed, and the user does not need to complete pre-work to be marked complete for the session.
- A session will not go into a Pending Pre-work status when the pre-work is NOT Required. This is same behavior is not a change. Sessions that have non-required pre-work move directly to a Completed status when the sessions are marked complete.

### Implementation

---

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

## Mobile

---

## Cornerstone Learn

---

## Cornerstone Learn Curriculum Support: View Child Items within Curriculum while Browsing - Overview

---

Prior to this enhancement, when using the Learn app, users were not able to view child training within a curriculum when browsing through the Learning Search page or Learner Home. Users could only view basic details for the curriculum, such as the description and provider.

With this enhancement, users can do the following with the Cornerstone Learn app:

- View child training items within a curriculum that is not on their transcript.
- Take action on child training within a curriculum even if the curriculum is not on their transcript.
- View the full curriculum structure, provided the training types are supported by the Cornerstone Learn app.

## Use Case

---

Sam is a learner who has recently downloaded the Cornerstone Learn mobile app to search for training. She logs in and browses through Learner Home and finds an interesting curriculum about Change Management. Sam navigates to the details of the curriculum and is able to browse through the one material and two online classes offered as part of the curriculum. She finds one of the online classes interesting, so requests only that online class from within the curriculum.

## Considerations

---

This enhancement applies to both the iOS and Android versions of the Cornerstone Learn app.

This enhancement does NOT apply to the legacy Cornerstone Mobile app.

## Exclusions

---

The following exclusions apply to this enhancement:

- Training cannot be activated within a curriculum using the Cornerstone Learn app.
- Curriculum Administration is not supported by the app.
- Training types that are not supported by the app cannot display in the curriculum structure in the app.

## Implementation

---

This functionality is automatically available to all users of the Cornerstone Learn app.

## Cornerstone Learn - View Curricula

When a user navigates to Learning Search or Learner Home within the Cornerstone Learn app, the user can access the Curriculum Details page for the curriculum and both view and take action on child training items contained within the curriculum, even if the curriculum itself is not on their transcript.



## Curriculum Courses

When a user taps a curriculum within the Cornerstone Learn app, they are navigated to the Curriculum Details page for the curriculum, which contains two tabs: Details and Courses.



To view the structure of the curriculum and the training contained in the curriculum, tap the Courses tab.

## Courses

---

On the Courses tab, each section of the curriculum displays. The user can view the full curriculum structure, provided all the child training within the curriculum is supported by the Cornerstone Learn app.

The user can tap a section to view the child training items contained in that section. If a section of the curriculum has already been completed by the user, the section shows a status of Completed. If the section has not been completed, no progress information displays. Even if the curriculum is not on the user's transcript, the user can perform available actions on the training contained within the curriculum, such as requesting the training.

The following supported training items can be accessed from within a curriculum:

- Online Courses
- Materials
- Videos

The following information displays for each child training item:

- Training Title
- Training Type (i.e. online course, material, video)
- Image Thumbnail

If a child training item within a curriculum is already on the user's transcript, when the user views the child training from within the curriculum, a message displays with the training stating, "This item is already on your transcript."

**Note:** *The curriculum structure respects the Mobile Enabled filter, meaning that if this filter is enabled, the user will only see mobile-enabled training on the Courses page.*









## Performance

---

## Display Shared Goal Owner

Prior to this enhancement, goal contributors could not see who owned their shared goals because this information was not displayed to goal contributors. Only the goal owner would know that they are the owner of the shared goal.

With this enhancement, goal contributors can see who owns their shared goals because the goal owner is now visible for shared goals from the My Goals, Team Goals, and Snapshot pages.

35%	<b>Have team create and implement employee engagement surveys quarterly using Cornerstone's Engage tool</b> Status: In Progress Due Date: 12/31/2018 Weight: 30%			
50%	<b>Manage bank reconciliations and payroll processing for all employees on time</b> Status: In Progress Due Date: 12/31/2018 Weight: 25%			
0%	<b>* Ensure effective monthly new employee orientation occurs</b> Status: Getting Started Due Date: 12/31/2018 Weight: 20% <b>Owner: Claire Smith</b>			

## How Does this Enhancement Benefit My Organization?

All goal contributors can now easily identify the owner of their shared goal. This is important because the goal owner is the only person who can manage the shared goal.

## Implementation

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

## Goals Respect Owner's Preferences and Configurations - Overview

---

Prior to this enhancement, when viewing goals or calculating goal progress, the logged in user's Goal Preferences and Goal Configurations were applied. Occasionally, this conflicted with the goal owner's Goal Preferences and Goal Configurations.

With this enhancement, the goal owner or goal assignee's Goal Preferences and Goal Configurations may be applied in Universal Profile Snapshot, Goals, and Goal Rating steps within performance reviews. Shared goals respect the goal owner's preferences and configurations.

## How Does this Enhancement Benefit My Organization?

---

This enhancement provides a consistent, intuitive experience by respecting all of the preferences and configurations set for the goal owner/assignee's organizational unit (OU).

## Use Cases

---

1. Laura is the administrator who configures the Goal Preferences and Goal Configuration in the ACME organization. John is a manager with a team of 10 direct reports, and Anna is one of his team members. John is based in United States, Anna is based in England, and they are in different OUs.
2. Currently, the Goal Preferences and Goal Configurations are set up differently in John's OU and Anna's OU. In John's OU, "Allow goal progress to exceed 100%" is enabled. However, it is disabled in Anna's OU.
3. Prior to this enhancement, when John was logged in to the system and navigated to Anna's Goals page, he could make Anna's goal progress exceed 100%, even though that preference was disabled for Anna's OU.
4. With this enhancement, John has enabled a setting so that the Goals functionality now respects the Goal Preferences and Goal Configurations of the goal owner or assignee. When this functionality is enabled, John can no longer make Anna's goal progress exceed 100% because Anna's preferences are enforced instead of John's.

## Considerations

---

- When creating a goal, the logged in user's preferences are always respected. After the goal is created or assigned, then the preferences set for the goal owner or assignee are respected if this functionality is enabled.
- If Goal Preferences are updated after a goal is created or assigned, then the updated preferences are enforced. This is existing behavior.
- Any changes made to the Success Descriptors in the Goal Configurations are not reflected in existing goals. Only goals that are created and assigned after the Success Descriptors are changed will follow the changes.

## Implementation

---

With the 14 December, 2018 patch release, the option to have the goal owner or goal assignee's Goal Preferences and Goal Configurations applied in Goals is disabled by

default, and the system continues to use the Goal Preferences and Goal Configurations of the logged in user.

Following the release, this option is enabled by default for all organizations that begin using the Performance suite.

Administrators with the appropriate permissions may enable or disable this option via Corporate Preferences. [See Corporate Preferences - Goals General Settings](#) on page 77 *for additional information*.

## Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Corporate Preferences - Manage	Grants ability to manage Corporate Preferences, which includes several portal-wide settings. This is an administrator permission.	Core Administration
Goal Configuration	Grants ability to manage Goal Configuration, which enables configuration of goal fields as well as goal statuses. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
Goal Preferences - Manage	Grants ability to manage Goal Preferences, where various goal features can be enabled or disabled according to the needs of the organization. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration

## Corporate Preferences - Goals General Settings

With this enhancement, a new Goal General Settings section is now available on the Corporate Preferences page. This section is only available for organizations that are using the Performance suite.

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


### Permissions

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

Corporate Preferences

Header Logo

Select Logo: Acme Corporate Logo.jpg

Logo: 

Remove

Upload New Header Logo

Upload Choose File No file chosen


Support Information

Support Email: helpdesk@company.com

Support Phone: 555-555-5555

Preferences

Compensation Currency: \$ USD

Absent Status: On the My Account page, the absent checkbox will display the name: Out of Office  (Character Limit is 100)

Portal Name Configuration

By Updating the portal name in this section, "Realize Your Potential: Techwriter" will be updated.

Portal Name: Techwriter

Goals General Settings

☐ Goals preferences and configuration respect the goal owner's OU. Changes made to this setting affect all goals.

## Goals General Settings

---

This is a new section.

This section is only available for organizations that are using the Performance suite.

This section enables you to configure general settings related to the Goals functionality.

The following options are available:

- **Goals preferences and configuration respect the goal owner's OU.** - When this option is selected, the goal owner or goal assignee's Goal Preferences and Goal Configurations are applied in Universal Profile Snapshot, Goals, and Goal Rating steps within performance reviews. Shared goals respect the goal owner's preferences and configurations. When this option is selected or deselected, the new setting is applied to all goals.
  - With the 14 December, 2018 patch release, this option is disabled by default for all organizations that are using the Performance suite.
  - Following the release, this option is enabled by default for all organizations that begin using the Performance suite.

## Recruiting

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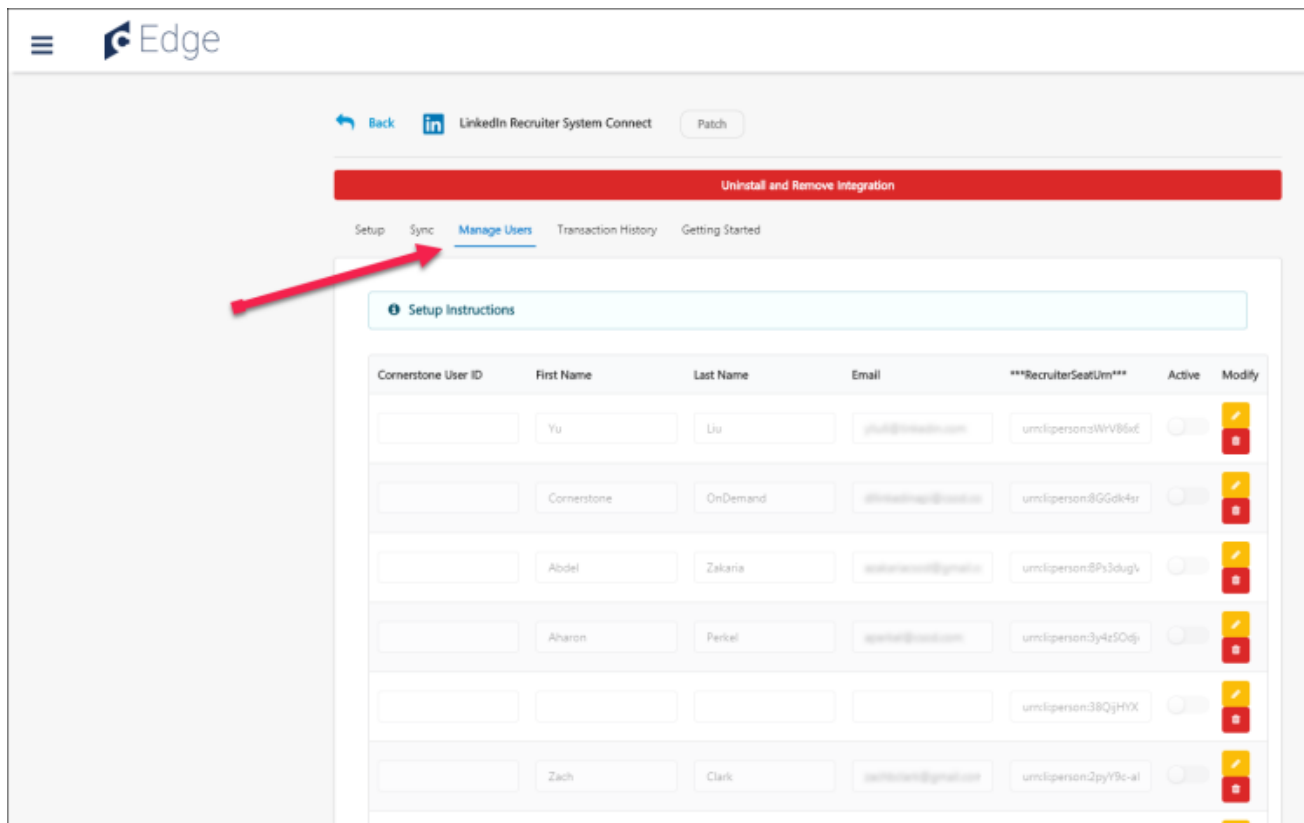
## LinkedIn Recruiter System Connect

This enhancement fixes an issue that was preventing InMail and notes from LinkedIn from appearing in Cornerstone. In some cases, the email addresses of LinkedIn Recruiter System Connect users are not being passed from LinkedIn to Cornerstone. To address this issue, administrators will be able to manually identify which Cornerstone users should be associated with seats in LinkedIn Recruiter.

On the Edge Integration page for LinkedIn Recruiter System Connect, administrators can now manually map LinkedIn Recruiter seat holders to users in Cornerstone. A new Manage Users tab is added to enable this feature. It is necessary to complete the new mapping process to ensure that your users are mapped appropriately.

To map seat holders:

1. Click the Manage Users tab on the LinkedIn Recruiter System Connect page in Edge Integrate.
2. Click the Modify icon in the Modify column for the user. This enables the user ID field in the Cornerstone User ID column to be editable.
3. Enter the corresponding user's user ID in the Cornerstone User ID column. This maps the LinkedIn seat holder to Cornerstone. The user ID is available by **searching for the user on the Users page**.

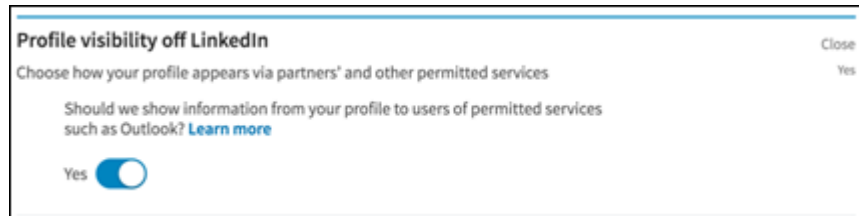


The screenshot shows the 'LinkedIn Recruiter System Connect' page in the 'Edge' interface. The 'Manage Users' tab is selected, indicated by a red arrow. Below the tab bar, there is a 'Setup Instructions' section and a table of users.

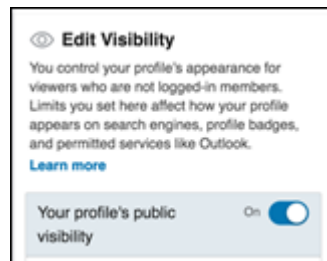
Cornerstone User ID	First Name	Last Name	Email	***RecruiterSeatUm***	Active	Modify
<input type="text"/>	Yu	Liu	yu@linkedin.com	umclperson3WV86eE	<input type="checkbox"/>	
<input type="text"/>	Cornerstone	OnDemand	ondemand@cornerstone.com	umclperson8GGdk4r	<input type="checkbox"/>	
<input type="text"/>	Abdel	Zakaria	abdelzakaria@gmail.com	umclperson8Ps3dugV	<input type="checkbox"/>	
<input type="text"/>	Aharon	Perkel	aharon@cornerstone.com	umclperson3y4z5Ody	<input type="checkbox"/>	
<input type="text"/>				umclperson38QjHYX	<input type="checkbox"/>	
<input type="text"/>	Zach	Clark	zachclark@gmail.com	umclperson2pyY8c-af	<input type="checkbox"/>	

For some users, the First Name, Last Name, and/or Email columns may not contain any information. This may be because the user's information has been configured in LinkedIn not to display. In such cases, the administrator should have the user modify their settings by doing one of the following:

1. **Allow Third Party Data Sharing** - From LinkedIn, enable users of permitted services to view your profile.



2. **Enable Visibility for Public Profile** - From LinkedIn, enable your profile to be visible to non-logged in users.



## Implementation

The option to activate LinkedIn Recruiter in the Edge Marketplace is available for all portals with Recruiting enabled. However, a LinkedIn Recruiter subscription is required for activation. LinkedIn Recruiter can be purchased through LinkedIn.

## Security

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
Edge Marketplace -	Grants access to the Marketplace service for Edge	Edge

Manage	Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	
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## 30 November Patch Release Functionality

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## What's New for the 30 November 2018 Patch Release

The following is released along with the 30 November 2018 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	Enhancement to Learning Search Filters	With this enhancement, when learners use filters on the Learning Search page, select a training item, and then return to the Learning Search page, their filter selections will persist.
Learning	Learning Compliance Enhancements - Learning Assignment Tool Enhancements	<p>With the Nov 30 patch, new Learning Compliance features and behaviors have an impact on the behavior of learning assignments using the Assign New Occurrence option, in Stage portals only. <b>It is recommended that you test these new features in Stage before the Production release of this functionality on Jan 4, 2019.</b></p> <p>The following behaviors have been updated:</p> <ul style="list-style-type: none"> <li>○ The <b>Assign New Occurrence</b> setting pushes the assignment training every time users enter the dynamic assignment criteria. Users who enter the assignment availability with previous version on their transcripts will continue to receive the latest version of the training.</li> <li>○ Curriculum reassignment provides users with the latest version of all child training contained within the curriculum.</li> </ul> <p>The following new option is available:</p> <p>A new option enables users to maintain their progress on all assigned training, provided the assignment was created with the <b>Assigned, Approved, and Registered</b> option selected.</p>
Recruiting	Add Invite to Apply Link for Apply with LinkedIn (With Apply Starters)	With this enhancement, an <b>Invite to Apply</b> link is added to the Applicant Profile page and only appears for candidates who apply with Apply with LinkedIn (With Apply Starters). This allows recruiters to invite candidates to apply to other jobs.
Recruiting	Additional Tags for Applicant Email	With this enhancement, additional tags are now

MODULE	FEATURE	DESCRIPTION
	Triggers	<p>available for applicant email triggers. The tags let you provide a greater level of detail about a user or job location within the email.</p> <p>The following new tags are available:</p> <ul style="list-style-type: none"><li>○ JOB.OU.LOCATION.TITLE</li><li>○ PROFILE.USER.ADDRESS.1</li><li>○ PROFILE.USER.ADDRESS.2</li><li>○ PROFILE.USER.CITY</li><li>○ PROFILE.USER.STATE</li><li>○ PROFILE.USER.POSTAL CODE</li><li>○ PROFILE.USER.COUNTRY</li></ul>

## Learning

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## Enhancement to Learning Search Filters

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With this enhancement, when learners use filters on the Learning Search page, select a training item, and then return to the Learning Search page, their filter selections will persist. The following Learning Search filters retain their selections when a user leaves Learning Search and then returns:

- Query (i.e. text entered into the Search bar)
- Duration
- Type
- Subject
- Rating
- Provider
- Languages
- Show Only Mobile Enabled

In addition, if a learner copies the URL for their filtered Learning Search page and sends the URL to another logged in user, when the second user accesses the Learning Search page, the first user's filter selections will be applied to the page. **Note:** *Users may see different training results when using the same URL, due to differences in availability.*

Administrators may use URLs for pre-filtered searches in custom search pages.

## Implementation

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

## Permissions

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The following existing permission applies 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



## Learning Compliance Enhancements

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## Learning Compliance Enhancements - Learning Assignment Tool Enhancements

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With the Nov 30 patch, new Learning Compliance features and behaviors have an impact on the behavior of learning assignments using the Assign New Occurrence option, in Stage portals only. **It is recommended that you test these new features in Stage before the Production release of this functionality on Jan 4, 2019.**

The following behaviors have been updated:

- The **Assign New Occurrence** setting pushes the assignment training every time users enter the dynamic assignment criteria. Users who enter the assignment availability with previous version on their transcripts will continue to receive the latest version of the training.
- Curriculum reassignment provides users with the latest version of all child training contained within the curriculum.

The following new option is available:

A new option enables users to maintain their progress on all assigned training, provided the assignment was created with the **Assigned, Approved, and Registered** option selected.

### Implementation

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This functionality is available in Stage portals using the Learning module on Nov 30, 2018, and this functionality will be available in Production portals using the Learning module with the Jan 4, 2019 patch.

**Important:** All existing learning assignments with the **Assign New Occurrence** turned ON will exhibit the new behavior following November 30th 2018 in Stage, and January 4th 2019 in Pilot and Production portals.

To keep these changes as seamless as possible, the **Maintain Progress** option will be turned ON for all assignments using the **Assign New Occurrence** option, so that users do not have to retake training that was previously on their transcript when they re-enter the learning assignment availability criteria. This option can always be turned OFF on the Learning Assignment Summary page if users need to take the training again upon assignment of the training.

### Permissions

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The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Dynamic Reassignment	Grants ability to enable/disable Dynamic Re-assignment for an assignment after submission. When Dynamic Re-assignment is enabled, users that meet the User Criteria again (after previously	Learning - Administration

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.	
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## Learning Compliance Enhancements

The behaviors of some fields available during the Learning Assignment Tool creation process have been updated and new options are also available. **These enhancements are available in Stage portals on Nov 30, 2018, and will be available in Production portals with the Jan 4, 2019 patch.**

To begin creating a new learning assignment, go to **ADMIN > TOOLS > LEARNING** and click the **Assignment Tool** link. From the Manage Learning Assignments page, click the **CREATE ASSIGNMENT** button.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Dynamic Reassignment	Grants ability to enable/disable Dynamic Re-assignment for an assignment after submission. When Dynamic Re-assignment is enabled, users that meet the User Criteria again (after previously being dynamically removed) are re-assigned. This permission is dependent on the Assignment - Standard, Dynamic - Standard and Dynamic, and Dynamic Assignment - Standard and Dynamic - Recurrence permissions. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

## Assign New Occurrence

The **Enable Assign New Occurrence** setting has been updated to push the assignment training EVERY time users enter the dynamic assignment criteria. Users who enter the assignment availability with previous version on their transcripts will continue to receive the latest version of the training.

**This new behavior will apply to NEW learning assignments and EXISTING learning assignments that have the Assign New Occurrence option turned ON. This behavior change is effective in Stage portals with the Nov 30 patch, and will be effective in Pilot and Production portals with the Jan 4 2019 patch.**

Example: Lauren from the Sales division at the California office receives the Sales Curriculum from a dynamic learning assignment that assigns training to sales employees in California. The next year, Lauren transfers to the Arizona office and no longer meets the availability of the Sales Curriculum assignment. However, after a few months, Lauren transfers back to the California office and once again meets the criteria of the assignment, and because the Assign New Occurrence option is enabled for the assignment, Lauren receives the latest version of the Sales Curriculum on her transcript.

**Assign New Occurrence**

Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained. This setting only applies to users on the Initial User List.

☒ Enable Assign New Occurrence

## Maintain Progress

If the **Enable Assign New Occurrence** setting is turned on, an additional option is available, which allows users to maintain their training progress when they are assigned a new occurrence of the same version of training on their transcript. To allow users who receive new occurrences of the curriculum to maintain their training progress on that version, toggle the **Maintain Progress** option to the On (green) position. If this option is not enabled, users who receive new occurrences of a training item via the learning assignment will NOT retain their training progress. **Note:** The **Maintain Progress** option is *ONLY* available if the following conditions are met:

- The administrator has selected the **Assigned, Approved, and Registered** option on the Options step of the learning assignment creation process.
- The **Only Assign New Occurrence to Users in the Completed Status** option is *NOT* selected.

**Create Assignment**

- ☒ Setup
- ☒ Options
- ☒ Schedule
- ☒ **Users**
- ☐ Confirm

**User Criteria**

Select the user criteria that will define who is included in the Assignment.

**Select Users**

Add users by selecting organizational units, groups and/or individual users.

**Upload Users**

Add users by uploading files with their Username, User ID or Email Address in the .csv format. Each file can have a maximum of 2000 users.

**Assign New Occurrence**

Enable this setting to assign a new occurrence of the training to users who already have it on their transcript. If a user is currently in progress, their progress will not be maintained. This setting only applies to users on the Initial User List.

☒ Enable Assign New Occurrence

☐ Only assign new occurrence to users in the "Completed" status

☒ **Maintain Progress**

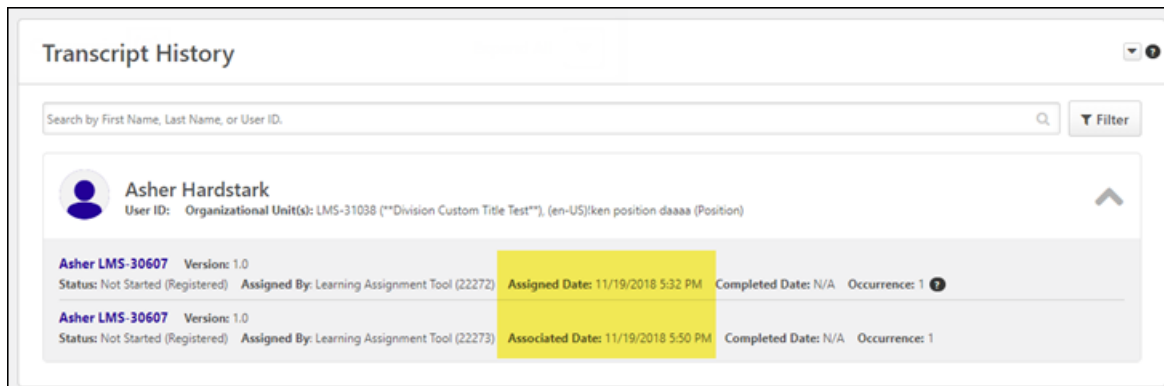
☐ If applicable, override all prior due dates for trainings contained in this assignment.

## Considerations

This new option does not increase the registration number for users who previously had the training on their transcript, allowing their progress to be maintained. They will still be associated with the learning assignment and will still be impacted by all other options associated with the learning assignment, such as due dates, emails, recurrence settings, removal settings, and reassignment settings. **Note:** This option always associates users

and training to the latest learning assignment that the user has entered into. This is the existing behavior for users meeting multiple assignment availability criteria.

Users with a previous training version with maintained progress on their transcript will see the new assignment in the Transcript History section. This line item in the history will show "Associated Date" to differentiate the **Maintain Progress** option from assignments that do NOT have the Maintain Progress option selected. Assignments not using the Maintain Progress option display "Assigned Date" instead of "Associated Date."



**Important:** With the release, all existing learning assignments with the **Assign New Occurrence** option enabled will have this feature turned ON. This is intended to alleviate the new behavior of the **Assign New Occurrence** option's impact on existing assignments. You can always deactivate this option on the Learning Assignment Summary page by turning the **Maintain Progress** toggle OFF.

## Curriculum Reassignment Behavior

Prior to this enhancement, if a user had a previous version of a child training item contained within a curriculum, when that user was removed from the assignment, the new curriculum version would be correct, but the child training would retain its version number from before the removal. With this enhancement, curriculum reassignment will always provide users with the latest version of all child training contained within the curriculum. **Important:** To maintain compliance, administrators must have the permissions for versioning materials, online courses, and curricula.

If administrators create a new version of child materials or online courses without having the Curricula Version – Manage permission as part of their security role, the curriculum containing these items will not be updated, and version updates cannot be maintained. The following permissions required for compliance include the following (Note that only one of the listed material versioning permissions is required, depending on your system configuration):

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Version - Manage	The constraints on this permission determine for which users the administrator can assign a new	Learning - Administration

	<p>version of a curriculum when reversioning the curriculum. This permission works in conjunction with the Curricula Admin - Manage permission. The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning a material that is contained within a curriculum. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.</p>	
Material Version - Replace Only - Manage	<p>Grants ability to assign a new version of a material to a user. The constraints on this permission determine to which users the administrator can assign a new version of a material. This permission works in conjunction with the Materials Management permission. Without this permission, administrators cannot upload new material source files. This permission can be constrained by OU, User's OU, and Users. This is an administrator permission.</p> <p>This permission only applies to organizations that are using Simplified Versioning for materials.</p>	Learning - Administration
Material Version with Append - Manage	<p>Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.</p> <p>This permission only applies to organizations that are using Versioning with Append for materials.</p>	Learning - Administration
Online Class Version - Publish	<p>Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission.</p> <p>As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.</p>	Learning - Administration

## Recruiting

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## Add Invite to Apply Link for Apply with LinkedIn (With Apply Starters)

Prior to this enhancement, candidates who applied with their LinkedIn resume using Apply with LinkedIn (With Apply Starters) and chose not to be included in Candidate Search, could not be invited to apply to another requisition. Moving a candidate to another job is not permitted by the Apply with LinkedIn (With Apply Starters) integration.

With this enhancement, an **Invite to Apply** link is added to the Applicant Profile page and only appears for candidates who apply with Apply with LinkedIn (With Apply Starters). This allows recruiters to invite candidates to apply to other jobs.

The **Invite to Apply** link appears in the **Add to Requisition** field. Clicking the link opens a pop-up that lets you select the position and send the applicant an email inviting them to apply to the job. The email is sent to the email address that the candidate used with their application. A confirmation that the email was sent appears in the applicant feed.

**Important Email Note:** An email is only sent to the candidate if the Invite to Apply email is configured and active in **Email Administration**.

Applied for 4 Job(s)

**Sr. Account Manage...**

Status: New Submission

Applied: 9/20/2018

**Jr. Accountant Entry...**

Status: Closed (Voluntar...

Applied: 12/20/2013

**Jr. Accountant, Level...**

Status: Closed (Voluntar...

Applied: 12/20/2013

**Customer Care Speci...**

Status: Closed (Position...

Applied: 12/20/2013

## Sr. Account Manager - North America (req204)

Summary	Statuses	Application	Comments	Documents	History	Email
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### Applicant Summary

<b>Current Status</b>	New Submission
<b>Resume/CV</b>	
<b>Application</b>	
<b>Source</b>	ABC Health
<b>Application Received</b>	9/20/2018
<b>Communication</b>	Send Email From Template  Send Customizable Email
<b>Rating</b>	☆☆☆☆☆ (0 Ratings)
<b>Application Flags</b>	No Flags
<b>Matching Criteria</b>	<div> <div></div> <div>33%</div> </div> <div>1 of 3</div>
<b>Reviewer Feedback</b>	N/A
<b>Add to Requisition</b>	Invite to Apply

Resume

Application Custom Fields

## Use Case

1. Sarah is a recruiter at ACME.
2. ACME just recently enabled the new Apply with LinkedIn (With Apply Starters) because the old Apply with LinkedIn was sunset by LinkedIn at the end of the year.
3. Jack applies to a senior level position on ACME's career site, using his LinkedIn profile.
4. Sarah conducts a phone screening with Jack and asks if Jack would be interested in a junior-level role instead. Jack agrees.
5. Sarah notifies Jack that he will see an invitation via email to apply to the new position. He can apply with his LinkedIn profile, which makes the application experience fast and easy.
6. Sarah returns to his profile, clicks the Invite to Apply link, and selects the desired position.

7. Sarah sends the email and sees a green notification bar on the Applicant Profile page that the email was sent.
8. Sarah returns to Jack's profile at a later time, selects the applicant feed, and sees confirmation that the invitation to apply has been sent.

## Implementation

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Apply with LinkedIn (With Apply Starters) is available for Recruiting clients who also have LinkedIn Recruiter and/or active LinkedIn Job Slots. The plugin is available without cost to those clients. The plugin must be enabled from the Edge Marketplace. For questions about the plugin, please reach out to your LinkedIn representative.

LinkedIn is sunsetting Apply with LinkedIn 1.0 at the end of 2018. [See Retirement of Apply with LinkedIn 1.0](#) on page 396 *for additional information*.

For more information about the Apply with LinkedIn (With Apply Starters) integration, [see the integration content in Online Help](#).

## Considerations/Exclusions

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- This link will only be available for candidates who applied with Apply with LinkedIn (With Apply Starters).
- This link will not show for those who are still using the original LinkedIn integration or for anyone who has not applied with Apply with LinkedIn.
- The email will only be sent if the email has been configured in Email Administration.
- The **Invite to Apply** link still appears on the Applicant Profile page even if the Invite to Apply email has not been configured.

## Additional Tags for Applicant Email Triggers

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With this enhancement, additional tags are now available for applicant email triggers. The tags let you provide a greater level of detail about a user or job location within the email.

The following new tags are available:

- JOB.OU.LOCATION.TITLE
- PROFILE.USER.ADDRESS.1
- PROFILE.USER.ADDRESS.2
- PROFILE.USER.CITY
- PROFILE.USER.STATE
- PROFILE.USER.POSTAL CODE
- PROFILE.USER.COUNTRY

These tags are available for the following email triggers:

- Add Applicant
- Applicant Status Change
- Application Confirmation
- Assign Applicant Assessment
- Assign Applicant Training
- Assign Integration Assessment
- Candidate Offer Response Received
- Custom Emails (when emailing the candidate via the "Send Email from Template" option)
- Disposition
- Duplicate Applicant Profile Merged
- Integration Assessment Completed
- Interview Scheduling (multiple)
- New Applicant Comment Posted
- Offer Approval Decision
- Offer Pending Approval
- Reference Letter Form Complete
- Request References/Reference Letter Request (to external references)
- SHL Assessment Assigned/Completed
- Voluntary Withdrawal

## Implementation

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This functionality is automatically available for all organizations using Recruiting. Some email triggers only apply to functionality that is associated with third party integrations.

## 9 November Patch Release Functionality

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## What's New for the 9 November 2018 Patch Release

The following is released along with the 9 November 2018 patch release:

<b>MODULE</b>	<b>FEATURE</b>	<b>DESCRIPTION</b>
Edge/Core	Ultimate Software's UltiPro Core Data Inbound Integration Enhancements	With this enhancement, organizations that are using the Ultimate UltiPro Core Data Inbound Integration can now specify the Tenant URL, which enables the organization to specify the correct UltiPro environment for the data sync, such as Production or Pilot. In addition, the default language preference that is set in UltiPro is now passed to Cornerstone, which is used when a user is created in Cornerstone; if the user's language is later updated in Cornerstone, the default language does not overwrite the user's new language setting. If the UltiPro default language preference is not available or enabled in Cornerstone, then the Cornerstone portal default language is used for the user. Lastly, when Cornerstone sends a summary email to the UltiPro integration contact, the email now specifies the environment in the email subject and attaches an audit log of all successes and failures; previously, only failures were included in the audit log.
Edge/Recruiting	Assessment Connector - Settings Page UI Enhancements	Within Edge, changes have been made to the location and order of fields on the Settings page of the Assessment Connector integration.
Learning/Extended Enterprise	PayPal Payment Gateway (Early Adopter) Enhancements - Dynamic Tax Calculator Integration using Cybersource	With this enhancement, administrators can enable the PayPal Payment Gateway (Early Adopter) integration to calculate taxes dynamically using the Cybersource Tax Calculator integration.
Learning	Cornerstone Learn Curriculum Support	With this enhancement, users of the Cornerstone Learn app can view and launch training items inside curricula from their transcripts. Curricula that is not on a user's

MODULE	FEATURE	DESCRIPTION
		transcript can also be viewed and requested in Learner Home carousels and in Search.
Learning	Test Engine 508 Compliance Support	With this enhancement, administrators can now add alternative text for an image or video within a test question.
Performance	Automated Goal Rating Enhancements	Enhancements have been added to improve the usability of the Automated Goal Ratings functionality.
Recruiting	Compliance Update to Flattened Application PDF	With this enhancement, the employer's name, logo (from <b>Corporate Preferences</b> ), and requisition address (from <b>the requisition</b> ) will be added to all flattened applications (i.e., the PDF version of the application) to support Federal Motor Carrier Safety Administration (FMCSA) compliance requirements.
Recruiting	LinkedIn Recruiter System Connect - Permission Constraint Sync from Cornerstone to LinkedIn	With this enhancement, permission constraints in Cornerstone that limit the requisitions and applicant information to which a recruiter has access are now reflected in LinkedIn Recruiter with the LinkedIn Recruiter System Connect integration. Constraints will be synced from Cornerstone to LinkedIn and will restrict the Cornerstone information that recruiters can see in LinkedIn Recruiter.
Recruiting	Manage Candidates - Set a Default Configuration of Filters	With this enhancement, you can now save your filter settings as default so that the Manage Candidates page is always filtered by the jobs, candidate statuses, and applicant flags you want to view. This is especially helpful when viewing large volumes of candidates across multiple jobs.

## Edge

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## Assessment Connector - Settings Page UI Enhancements

Within Edge, the following changes have been made to the location and order of fields on the Settings page of the Assessment Connector integration:

1. Move Job Requisition ID field from Assessment Data to Job Requisition Details.
2. Move Recruiter Email from Applicant Data to Assessment Data.
3. Move Organizational Unit section below Job Requisition Details.
4. In the Job Requisition Details section, list fields in the following order:
  - A. Job Requisition ID
  - B. Display Job Title
  - C. Job Requisition Primary Owner Name
  - D. Job Requisition Primary Owner Email
  - E. Job Requisition Country
5. In the Assessment Data section, list fields in the following order:
  - A. Assessment ID
  - B. Recruiter Email
  - C. Timestamp
  - D. Integration Order ID
6. Assessment Data has been re-labeled as Assessment Order Details.
7. Organizational Unit has been re-labeled as Job Requisition Organizational Unit.

## Implementation

This functionality is automatically available to use with new and existing integrations that are built using the Assessment Connector.

For organizations with an existing integration that was built using the connector, it is necessary to contact the assessment vendors to inform them of the enhancements to ensure that they are properly utilized and do not negatively impact their current integration.

New integrations can be enabled and configured via Edge Marketplace and Integrations. Organizations must have an existing contract with a third-party assessment vendor. During the setup, the organization completes the credentials section and chooses the fields to enable and send over to the assessment provider when an assessment request is submitted. Organizations provide the list of selected fields to their assessment provider.

For more information about the Assessment Connector, see the API Explorer in Edge.

## Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge - API Explorer	Grants access to the API Explorer, which provides access to help documentation for various API	Edge

applications.

## Ultimate Software's UltiPro Core Data Inbound Integration Enhancements

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With this enhancement, organizations that are using the Ultimate UltiPro Core Data Inbound Integration can now specify the Tenant URL, which enables the organization to specify the correct UltiPro environment for the data sync, such as Production or Pilot. In addition, the default language preference that is set in UltiPro is now passed to Cornerstone, which is used when a user is created in Cornerstone; if the user's language is later updated in Cornerstone, the default language does not overwrite the user's new language setting. If the UltiPro default language preference is not available or enabled in Cornerstone, then the Cornerstone portal default language is used for the user. Lastly, when Cornerstone sends a summary email to the UltiPro integration contact, the email now specifies the environment in the email subject and attaches an audit log of all successes and failures; previously, only failures were included in the audit log.

### Considerations

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- Data is only sent from UltiPro to Cornerstone. User record data and Organizational Unit (OU) data is not sent from Cornerstone to UltiPro if users or OUs are updated or added in Cornerstone.
- OU and user data is synced from UltiPro to Cornerstone nightly. OU data is synced from UltiPro at 3:00 AM PST, and User data is synced at 4:00 AM PST.
- Ultimate's Employee APIs refresh every three hours. As a result, a force sync only syncs all users when the Ultimate API is refreshed with all changes.
- Only standard fields are sent from UltiPro to Cornerstone. Custom fields are currently not supported.
- Timezone data is not sent from UltiPro to Cornerstone for OUs or users. It must be configured as a system property.
- UltiPro implementations that have multiple companies, positions, and locations are not supported by this integration.
- Any existing users and OUs that were created prior to enabling this integration would be updated by UltiPro if they exist in UltiPro.

### Ultimate UltiPro Core Data Integration Enablement

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To enable the Ultimate UltiPro Core Data integration:

1. Open UltiPro and navigate to the System Account Administration (**MENU > SYSTEM CONFIGURATION > SERVICE ACCOUNT ADMINISTRATION**).
2. Select the **ADD** button to add a new account.

## Service Account Administration

Customer API Key

Actions  OK

Find by  User name  starts with

User Name	Status	Last Logon	User API Key

3. Populate the **User name**, **Password**, and **E-mail** fields. **Note:** These credentials will be used when configuring the integration within Cornerstone Edge.
4. Then, grant **View** access for the following Web Service permissions:
  - A. Company Configuration Integration
  - B. Employee Export

## Add/Change Service Account

User name  P1  C

Password  \*\*\*\*\*

E-mail  UL  :@ultima

**Password Requirements**

Password length: 4-15

Web Service	Add	View	Edit	Delete
Employee Person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Development Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development Opportunity Session	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development Opportunity Participation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PTO Plan Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Configuration Integration	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Export	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payroll Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talent Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Select the **SAVE** button to save the service account.
6. Navigate to the Display Settings to identify the Organization Levels and their corresponding Description values. For example, in the below image, Organization Level 1 is configured to be Division, as indicated by the **Description** field for this Organization Level.

**Display Settings**

edit labels | edit | print | help

Danish (DNK) | Dutch (NLD) | English (CAN) | English (GBR)  
 Filipino (PHL) | French (CAN) | French (FRA) | German (DEU)  
 Italian (ITA) | Malay (MYS) | Portuguese (BRA) | Spanish (USA)  
 Swedish (SWE)

Organization Level 1		Organization Level 2	
Code	Div	Code	Dept
Code length	6	Code length	6
Description	Division	Description	Department

Organization Level 3		Organization Level 4	
Code	Region	Code	Team
Code length	6	Code length	6
Description	Region	Description	Team Lead

**Transfer of Employee Documents**  
☒ Copy documents to new company during employee transfer.  
☐ Do not copy documents to new company during employee transfer.

**Window Title Settings**  
 Hide Employee Number ☐ NO

7. Open the Edge Marketplace (**ADMIN > TOOLS > EDGE > MARKETPLACE**). Then, search for and purchase the Ultimate UltiPro Core Data Sync Integration.
8. Activate the integration via Edge Integrate (**ADMIN > TOOLS > EDGE > INTEGRATIONS**).
9. Configure the integration on the Edge Settings page by entering the following information:
  - A. Customer API Key - This is the UltiPro five-character Customer API Key that is found on the Service Account Administration page.
  - B. Tenant URL - UltiPro service endpoints are comprised of two parts: Tenant URL and resource path. The Tenant URL will be similar to <https://servicet.UltiPro.com>, but will vary by customer datacenter and production/test environments. This enables you to specify the correct UltiPro environment (Production, Pilot, Stage) for the data sync.
  - C. Username - Enter the User name value that was set when creating a service account in UltiPro in step 3.
  - D. Password - Enter the Password value that was set when creating a service account in UltiPro in step 3.
  - E. Contact Email - Enter the email address to which you want error notifications to be sent (multiple email addresses should be separated by a comma). A best practice is to set up an email distribution list of all administrators who would monitor integration errors.
  - F. User Identifier - Select whether UltiPro uses the User ID or User Number as the unique identifier for users.

- G. OU Mapping - Select which Organization Level in UltiPro corresponds with each OU type in Cornerstone. **Note:** *The Location and Position OUs in Cornerstone automatically map to UltiPro's Location and Job Organization Levels.*

Once the integration is enabled, all existing data is automatically scheduled to be synced from Ultimate UltiPro to the Cornerstone system. Following the initial sync, administrators can log in to their Ultimate UltiPro account and create or edit organization entities (e.g., Organization Level 1, Organization Level 2), and these entities will be created or updated as OUs in the Cornerstone system. Similarly, administrators can create or edit employees, and these employees will be created or updated as users in the Cornerstone system.

Once a sync is complete, a notification email is sent to the specified email address that is configured in the Contact Email field for the integration. The email contains a list of each OU and user that was added, updated, or failed to sync. For failures, a failure reason is included.

## Implementation

The Ultimate UltiPro Core Data integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This enhancement is automatically enabled for organizations that are using the Ultimate UltiPro Core Data Inbound Integration. This integration is available to all organizations. Organizations must also have an Ultimate UltiPro account.

## Security

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Universal Profile -	Grants ability to view user records in the system.	Core

User Record - View Users	Administrators can view the Modification History page for user records within their constraints. The administrator must have additional permissions to view specific fields on the user record. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.	Administration
--------------------------	--	----------------

## Extended Enterprise

---



## PayPal Payment Gateway - Dynamic Tax Calculator

## PayPal Payment Gateway Enhancements - Dynamic Tax Calculator Integration using Cybersource

---

Prior to this enhancement, administrators configuring the PayPal Payment Gateway (Early Adopter) integration could manually set tax rules within PayPal.

With this enhancement, administrators can enable the PayPal Payment Gateway (Early Adopter) integration to calculate taxes dynamically using the Cybersource Tax Calculator integration.

### How does this enhancement benefit my organization?

---

- This enhancement allows organizations who wish to offer PayPal as a payment method to utilize an existing partner to perform dynamic tax calculation, reducing administrative time.

## Use Cases

---

### Use Case 1: Existing Tax Calculation User

---

Flinn is the business process owner and administrator at ACME Corporation, which is a well-known provider of software engineering courses. They are using Extended Enterprise to sell the content. ACME is required to collect varying taxes on most of their sales. Their catalog has been configured to work with Cybersource as the payment gateway.

With the PayPal tax calculator, Flinn enables the PayPal Payment Gateway integration to accept payments, with confidence that ACME's complex tax rules will be respected.

### Use Case 2: New Tax Calculation User

---

Khalil is the business process owner and administrator of Ventonix Enterprises, which is a well known provider of training content. Ventonix wants to sell content to the public, but must be compliant with various tax rules in order to do so. Because the PayPal Payment Gateway integration can be configured to dynamically calculate taxes, Khalil is able to create a new account with Cybersource, configure tax rules, and then enable the PayPal Payment Gateway integration to accept payments.

## Considerations

---

- Organizations using the PayPal Payment Gateway integration who wish to use the dynamic tax calculator are responsible for contracting with Cybersource to establish a Tax Calculation account. See: <https://www.cornerstoneondemand.com/marketplace/cybersource>
- If Tax Calculation with Cybersource is enabled, organizations using the PayPal Payment Gateway integration are responsible for disabling any PayPal tax rules that have already been configured.
- Your organization will need a PayPal business account in order to use the Cybersource Tax Calculator.
- Organizations will need to have Cybersource enabled in two different environments:

- Cybersource Test is linked to CSOD Stage, Pilot
- Cybersource Live is linked to CSOD Production
- Tax fields for PayPal transactions will flow to Standard Reports, Custom Reports, and Reporting 2.0.

## Implementation

---

In order to utilize this functionality, the PayPal Payment Gateway integration must be enabled, and your organization must create an account with Cybersource.

- For more information about configuring the PayPal Payment Gateway integration: [See \*\*PayPal Payment Gateway Integration\*\*](#) on page 209 *for additional information*.
- For more information about creating a Cybersource account:  
<https://www.cornerstoneondemand.com/marketplace/cybersource>

## 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

## Dynamic Tax Calculation - Define Payment Account

On the Define Payment Account page, administrators can configure the Cybersource Tax Calculator integration.

To access the Define Payment Account preferences page, go to **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > E-COMMERCE** and click the **Modify Payment Account** link. In the Payment Account section, click the Add icon to add a new payment account.

### Permissions

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

Define Payment Account

Define Payment Account

Name : PayPal Payment Account  
Description :

**DEFINE CRITERIA**

Training Type is Online Class


**DEFINE PAYMENT GATEWAY**

PayPal

**PAYPAL INFORMATION**

Please enter PayPal information. The Client ID and Client Secret are generated by creating an app using PayPal Developer Tools.  
Merchant Account ID : 123456  
Client ID :  
Client Secret :

**CYBERSOURCE TAX CALCULATOR INTEGRATION**

☒ When enabled, this PayPal payment account will be integrated to use Cybersource's tax calculator. A tax calculation account must be created with Cybersource in order to use this.  
Please enter Cybersource information. Transaction key is generated from the Cybersource Portal and is a required field. All other fields are optional. Tax Nexus and VAT number is only applicable if sales tax calculation functionality is turned on.  
Transaction Key :  (Generated in the Cybersource portal)  
Merchant Descriptor :  
Merchant Descriptor Contact :  
Merchant Descriptor (Others) :  
Tax Nexus :  
VAT Number : Enter up to 10 comma separated VAT numbers. Do no include special characters other than the comma (",").

**MERCHANT ACCOUNT INFORMATION**

Once saved, the Merchant ID cannot be changed. Using a different Merchant ID requires creating a new payment account then deleting the unneeded payment account. Delete the unneeded payment account only if no existing transactions will require refunds.  
Bank Name :  
Merchant ID :

**MODIFICATION HISTORY**

Save Cancel

## Cybersource Tax Calculator Integration

---

In the Cybersource Tax Calculator Integration section, administrators enable the setting which allows the PayPal Payment Gateway integration to use an existing Cybersource account to dynamically calculate taxes for PayPal transactions.

To enable this setting, toggle the Cybersource Tax Calculator Integration toggle to the On position. If you do not wish to enable the Cybersource Tax Calculator, leave this switch toggled to the Off position. **Note:** *You must create a Cybersource account prior to enabling this option in order to allow the PayPal Payment Gateway integration to dynamically calculate taxes.*

If the Cybersource Tax Calculator Integration has been enabled, the administrator can configure the following fields which appear on the page:

- Transaction Key - The Transaction Key is generated from the Cybersource portal and is a required field.
- Merchant Descriptor
- Merchant Descriptor Contact
- Merchant Descriptor (Others)
- Tax Nexus
- VAT Number
- Merchant ID

## Dynamic Tax Calculation - User Payment Preferences

If the PayPal Payment Gateway is enabled in Payment Preferences, additional options to allow or require the collection of a secondary billing address are available to the administrator.

To manage User Payment preferences, go to **ADMIN > TOOLS LEARNING > E-COMMERCE > PAYMENT METHODS**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Payment Preferences - Manage	Grants ability to manage user payment preferences, which includes determining the payment methods allowed and percentage of overall price that users must pay when purchasing learning content. This permission can be constrained by OU and User's OU. This is an administrator permission.	eCommerce - Administration

**PAYMENT PREFERENCE**

**Proxy Enrollment:**  
☐ Select this preference to check the "Bypass User Payment" option by default.

**Payment Options:**  
☒ **Coupon** (only 1 coupon can be applied to each item)  
☐ Specify the number of coupons you would like to limit for each transaction

☒ **Credit Card** (These settings will only take effect if the transaction is processed using CyberSource or Pay.gov gateways)  
 Select Valid Credit Card Types: ☒ VISA ☒ MasterCard ☒ American Express  
☐ Charge user for Program price only. If user pays with credit card, user does not pay credit card fees. Merchant pays fees.  
☐ Allow users to store credit card information on My Account Billing Profile page. (Required for Recurring Billing)  
☐ Collect secondary address at time of transaction    
☐ Use secondary address in tax calculation.  
☐ Show comments input box

☒ **PayPal** (This setting will only take effect if the transaction is processed using PayPal gateway)  
**Note: If using PayPal, the available selection of credit card types is controlled via the PayPal portal**  
☐ Collect secondary address at time of transaction    
☐ Use secondary address in tax calculation.

☒ **Request Bill**  
 Request Bill: Select Request Bill display name when Request Bill is an active payment option

## Payment Preference

When the PayPal option in the Payment Preference section is enabled, the following additional options can be configured:

- **Collect secondary address at time of transaction** - Select this option to allow users to enter a secondary address for the payment during the checkout process. When this option is selected, a Required/Optional toggle is enabled, which allows the administrator to determine whether the secondary address fields are required or optional. If the secondary address is optional, then all fields within the secondary address are optional, regardless of the Billing Information Preferences.
- **Use Secondary Address in Tax Calculation** - This field is enabled when the Collect secondary address field is selected and defined as required. This field only displays if at least one learning object (LO) is selected on the Tax Preferences page to indicate tax collection by LO.

## Dynamic Tax Calculation - Billing Address

---

In order to dynamically calculate taxes during the checkout process, a billing address must be collected from the user. If the Cybersource Tax Calculator integration has been enabled and the user has selected PayPal as the payment method, the user is prompted to populate the following billing address fields during the first step of the checkout process when purchasing training:

- Email
- First Name
- Last Name
- Address Line 1
- Address Line 2
- City
- Country
- State/Province
- Zip Code

This information allows Cybersource to dynamically calculate tax for the purchase.

- If enabled in User Payment Preferences, users can also opt to provide a secondary address if their billing address is separate from their shipping address. Providing a secondary address can be configured as required via User Payment Preferences, if needed. If preferences are set to collect a secondary address, the user will see the following options during checkout:
- **Use the billing address as my shipping address?**
  - **No** - If the user selects this option, the user's billing address will be the same as their shipping address.
  - **Yes** - If the user selects this option, the user will be prompted to complete the following fields for the secondary address:
    - Email
    - First Name
    - Last Name
    - Address Line 1
    - Address Line 2
    - City
    - Country
    - State/Province
    - Zip Code

For more information about the checkout process: [See Checkout - Step 1 - Payment](#).



Shopping Cart

Checkout

Step 1 - Payment

Options

Checkout is a three step process. Each step is contained with in a drop down table. Expand Billing, Payment and Review, enter all required information, and select to Place Order to complete the purchasing process.

Payment

Review

Confirmation

Payment Method

PayPal

PayPal

MasterCard

VISA

DISCOVER

AMERICAN EXPRESS

Proceeding will take you to PayPal to log in to your account or checkout as a guest (if enabled). You will have an opportunity to review your order after logging in to your PayPal account.

Billing Address

Your billing information should appear as it does on your credit card statement.

\* Required Field

Email \*

First Name \*

Last Name \*

Address Line 1 \*

Address Line 2

City \*

Country \*

State/Province

Zip Code \*

Back

Next

Purchase Summary

EU Competit...

\$500.00

Subtotal

\$500.00

Enter coupon c...

Apply

## Dynamic Tax Calculation - Tax Values Sent to PayPal

---

When both the PayPal Payment Gateway enhancement and the Cybersource Tax Calculator integration are enabled, and a user pays for training using PayPal, the calculated tax values for the transaction and the user's billing address are sent from the Cybersource Tax Calculator to PayPal. The tax values applied to and recorded for the transaction may be reflected in the following system areas:

- Course Catalog - Training Price by OU:
  - Billing Entities
  - Product Code
  - Apply/do not apply tax checkbox
- ILT Tax based on Location of Session
- My Account - Billing Profile
  - Tax Override
  - VAT Number
- Payment Accounts - PayPal
  - Tax Nexus
  - VAT Code

After the transaction, the tax values can be validated in the following locations:

- Paypal
- Manage Transactions
- Order History
- Reporting
- Emails

## Learning

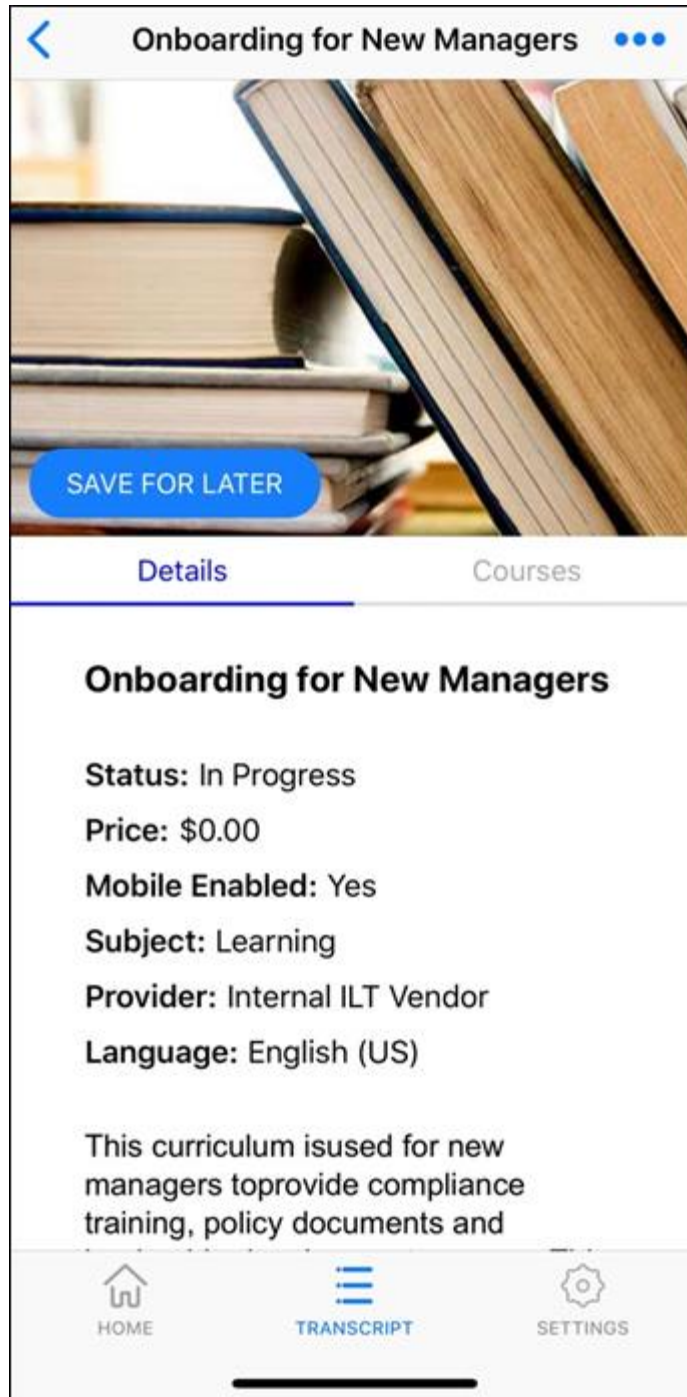
---

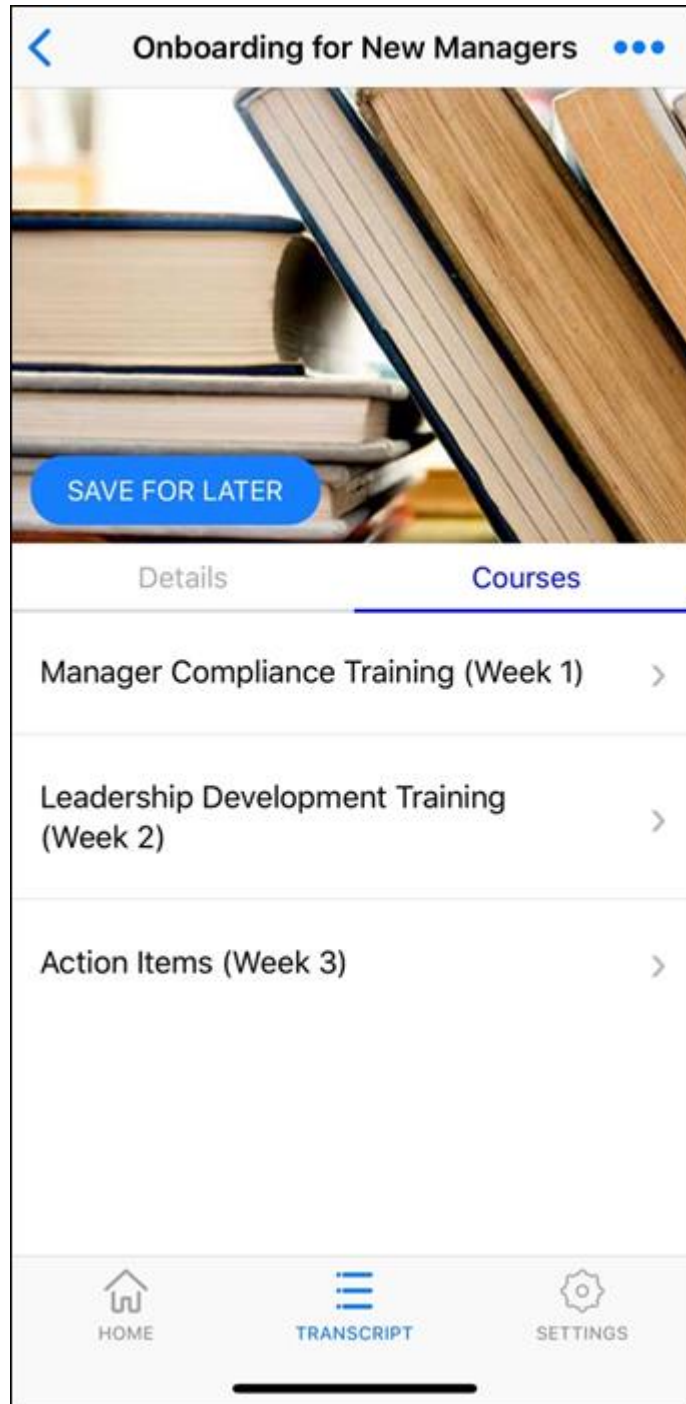
## Cornerstone Learn Curriculum Support

---

With this enhancement, users of the Cornerstone Learn app can view and launch training items inside curricula from their transcripts. Curricula that is not on a user's transcript can also be viewed and requested in Learner Home carousels and in Search.

The following images show what a user will see after navigating to a curriculum on their transcript. Users can launch mobile-enabled training (e.g., online classes, videos, materials) within the curriculum.





## Use Case

Sam is a learner who has downloaded the Cornerstone Learn mobile app to stay current on training required for her role. While at work, she receives an email that she has been assigned a new curriculum which will help build her management skills. The curriculum includes two courses she knows she wants to complete first, an online class and a video. Sam logs into the app and navigates to her transcript when she has free time at home and completes one of the courses. The course status updates on her transcript, and the next

day at work, she continues taking the training within the curriculum with her curriculum progress intact.

## Considerations

---

The following considerations apply to this enhancement:

- This enhancement is not available in the legacy Cornerstone Mobile app.
- Curriculum features do not support any administration tasks in the app.
- If a curriculum contains a non-supported training item, this item does not appear in the curriculum when viewing the curriculum in the app.
- Only curricula on the transcript will show child training items, and the curricula will only show mobile-enabled training by default.
- When viewing curricula in search results:
  - Users can request and see basic details about the curriculum.
  - Users cannot see child training items.

## Implementation

---

Upon release, this functionality is automatically available in the iOS and Android Learn apps.

## Test Engine 508 Compliance Support

With this enhancement, administrators can now add alternative text for an image or video within a test question.

The following field is now available:

- **Image or Video alt text** - This field is only available when an image or video is added to a test question. Enter a short, distinct description of the image or video. The alternative (alt) text is what an accessibility or screen reader references and voices to an impaired user when encountering the image or video. This helps to ensure impaired users can understand the context of the question and answer appropriately. Without alt text, a screen reader may simply say “image” or ignore the image. This field is optional.

The screenshot shows a 'Create Question' dialog box with a 'Question Properties' tab. The fields include: 'Question:' (text area), 'Response Type:' (dropdown menu), 'Question Image or Video:' (file icon and 'searchHints1.png'), 'Image or Video alt text:' (text area with placeholder 'Description of image or video here'), 'Answer Explanation:' (text area), 'Category:' (dropdown menu), and 'Active:' (checkbox). At the bottom are 'Cancel' and 'Submit' buttons.

## How Does this Enhancement Benefit My Organization?

This field enables organizations to provide more accessibility features to impaired users.

## Use Cases

1. Yanny is visually impaired and requires a screening-reading tool to read the contents of a test question in order to response appropriately.
2. Yanny's system administrators create test questions and enter alt text for each image within a test question.
3. With the alt text, Yanny can better understand the content of an image because his screen reader voices the image's alt text, and Yanny can better answer the question.

## Implementation

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



## Security

---

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Test Question Bank – Manage	Grants ability to create and edit/update test questions in the test engine question bank. 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

## Performance

---

## Automated Goal Rating Enhancements

---

The following enhancements have been added to improve the usability of the Automated Goal Ratings functionality:

1. The page instructions on the Create Goal Rating Section page are enhanced to include the following additional information:
  - "To enable Automated Goal Ratings, open the Edit Rating Scale menu."
2. An Automated Goal Rating Status Indicator is added to the Rating Scale section when defining a Goal Ratings form section. The text displays either "Automated Goal Ratings: On" or "Automated Goal Ratings: Off."

## Edit Section

Create and customize a performance review section to appear in any performance review. Determine whether this section will contain goals, competencies, or Rating Scale and/or text response questions from the Section Type drop down. Custom Fields may be added to any section, except Sign-Off sections. Rating Scale and/or Text Response questions may be added to sections containing goals and competencies. Suggested comments may be added to each Rating Scale question. Weights can be applied to each free form question. When entering the directions for this section, you may insert tags that are replaced with information about the employee reviewed or with links to that employee's performance data. To enable Automated Goal Ratings, open the Edit Rating Scale menu.

## Review Section 1

## DEFINE REVIEW SECTION

Name: 360° Performance Review Goal Ratings

Type: Please select the section type before proceeding.

Goal Rating Section

## DETAILS

## View Employee Custom Tags

Directions:

Consider EMPLOYEE NAME's performance during the specified time period in the following goal areas. Please rate either the goal or the goal-related question, whichever is more relevant to the employee's performance.

Design HTML

Category: --Select--

## RATING SCALE

## Automated Goal Rating: OFF

Score	Title	Description
Too New To Rate	Too New To Rate	Employee has not been in the position long enough to rate performance.
1	Below Expectations	Rarely or never demonstrates expected behavior/knowledge in own work; Requires substantial oversight and direction.
2	Needs Improvement	Demonstrates expected behavior/knowledge inconsistently or in situations of low complexity/challenge; Requires guidance to deal with more complex situations.
3	Meets Expectations	Uses expected behavior/ knowledge consistently in a full range of typical situations/challenges.
4	Periodically Exceeds Expectations	Applies expected behavior/ knowledge successfully in unusual or challenging situations (without any guidance); Periodically goes beyond expected behavior/knowledge - demonstrating superior problem solving, critical judgment and innovation.
5	Regularly Exceeds Expectations	Uses expected behavior/ knowledge appropriately in most complex or demanding situations; Consistently exceeds expectations - demonstrating superior problem solving, critical judgment and innovation; Guides others in dealing with challenging situations.

- ☒ Display Rating Scale  
☐ Hide Rating Scale  
☐ Display Scores to End Users

## RATING METHOD

Select a rating method that will be used in the review. Score Interval selection must be 1.0 for the below options to be available.

- ☒ Drop Down Rating  
☐ Star Rating Scale

## CUSTOM FIELDS

Add Custom Fields

## GOAL SETTINGS

Filter by Perspective: None

- ☐ Use the goal "Weight" as the weight for each goal.  
☒ Display Goal Weights on Review  
☐ Allow goal progress updates in Review  
☐ Include Feedback responses on Goals in Review  
☐ Display weighted goal achievement progress

## QUESTION SETTINGS

Total Goal Weight: 100 %  
 Total Question Weight: 0 %

- ☐ Display Question Numbers on Review.  
☒ Display Question Weights on the Print Version of the Review.

## QUESTIONS

SECTIONS AND QUESTIONS	TYPE	RESPONSE REQUIRED	WEIGHT	OPTIONS
How did the employee perform compared to the goals set at the beginning of the year?	Text Only	<input type="checkbox"/>	0%	
TOTAL			0.00%	

Cancel Save

## Implementation

---

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

## Security

---

The following existing permission applies 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

## Recruiting

---

## Compliance Update to Flattened Application PDF

---

*This was announced as part of the October '18 release and will now be available with the 9 November Patch Release.*

With this enhancement, the employer's name, logo (from **Corporate Preferences**), and requisition address (from **the requisition**) will be added to all flattened applications (i.e., the PDF version of the application) to support Federal Motor Carrier Safety Administration (FMCSA) compliance requirements.

Prior to this enhancement, the flattened application only had information about the candidate and did not contain information about the employer. The company's name and address were not included, and there was no branding of the employer, such as a company logo. In addition, the flattened application was not compliant with FMCSA compliance regulations Section 391.21(b).

## How Does this Enhancement Benefit My Organization?

---

### FMCSA Compliance

#### Key Details that Candidates Can Use

This enhancement is especially beneficial to organizations that have driving positions and organizations that need to be compliant with FMCSA. This is also highly beneficial to organizations that circulate flattened applications to external users, because the application will contain more detail about the employer.

## Considerations/Exclusions

---

- The features in this enhancement will be added to all flattened applications that are generated after the release date, but will not be added to any historical flattened applications.
- The corporate logo image will not be resized to fit the flattened application. If the uploaded image is large, then it will also be large on the flattened application.
- The corporate logo image will be pulled from the Corporate Preferences page. Images uploaded here are generally smaller to fit the header of the organization's portal. However, large corporate logos have the potential to make the flattened application slightly longer.
- The address will be pulled from the requisition to which the candidate has applied. If the requisition has both a primary and secondary address, the primary address will be used.
- If a requisition does not have an address, then the line item will not appear on the flattened application.
- For compliance reasons, the features in this enhancement are not configurable.

## Implementation

---

This functionality is automatically available for all organizations using Recruiting.

## Security

---

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration



## LinkedIn Recruiter System Connect - Permission Constraint Sync from Cornerstone to LinkedIn

---

*This was announced as part of the October '18 release for the LinkedIn Recruiter System Connect enhancement and will now be available with the 9 November Patch Release. See **LinkedIn Recruiter System Connect Overview** on page 364 for additional information.*

With this enhancement, permission constraints in Cornerstone that limit the requisitions and applicant information to which a recruiter has access are now reflected in LinkedIn Recruiter with the LinkedIn Recruiter System Connect integration. Constraints will be synced from Cornerstone to LinkedIn and will restrict the Cornerstone information that recruiters can see in LinkedIn Recruiter.

### Permission Constraints Use Case

---

John Smith is a recruiter at Acme Co. who is constrained to the Sales division, which means he cannot see requisitions in the Engineering Division or application information from candidates who applied to requisitions in the Engineering division. John has access to LinkedIn Recruiter. If Acme Co. enables the LinkedIn Recruiter System Connect integration after the 9 November 2018 patch release, then when John looks at LinkedIn Recruiter, he will only be able to export candidates to open requisitions in the Sales division. He will only be able to export candidates to requisitions in the Sales division, and he will only see Cornerstone application details for candidates who applied to Sales requisitions.

## Manage Candidates - Set a Default Configuration of Filters

*This was announced as part of the October '18 release for the Manage Candidates (Early Adopter) Configurable Columns enhancement and will now be available with the 9 November Patch Release. See **Manage Candidates (Early Adopter) Configurable Columns Overview** on page 378 for additional information.*

With this enhancement, you can now save your filter settings as default so that the Manage Candidates page is always filtered by the jobs, candidate statuses, and applicant flags you want to view. This is especially helpful when viewing large volumes of candidates across multiple jobs.

FiltersReset<

REQUISITION^

☒

Show only open reqs

All Jobs999+

My Jobs36

Search requisition

☒

Sales Exe.. (REQ151)12

☒

Sales Rep.. (REQ150)32

☐

Marketer (REQ123)22

☐

Account.. (REQ412)8

☐

Sales Man.. (REQ368)17

CANDIDATE STATUS^

☒

Show only active candidates

☐

Background Check32

☐

First Interview48

☐

In Review28

☐

Invited to Apply104

☐

New Submissions276

☐

Offer42

☐

Second Interview39

APPLICANT FLAGS^

☐

Interviewed

23

☐

A Must Hire

8

☐

Sales

12

☐

Gold Medalist

6

☐

Senior

35

☒

Save As Default

Candidates

44

All Candidates

1

New Su

Batch Actions...

☐

CANDIDATE^

☐

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☐

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☐

Rebecca Lee

987-113-7547

[rlee@email.com](mailto:rlee@email.com)

Batch Actions...

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To save your filter settings:

1. Select your desired filters in the Requisition, Candidate Status, and Applicant Flags sections.
2. Click **Save As Default** at the bottom of the Filters panel. A pop-up message appears at the top of the page to let you know that your selections were successful.

Your filter settings will remain even when you leave Manage Candidates and return or log out of your portal and log back in. This creates a more efficient experience when viewing and comparing candidates.

You can remove your default settings by clicking **Reset** at the top of the Filters panel. This returns the filters to their default system settings.

## Core

---

## Custom Reports - User Fields (Groups)

Prior to this enhancement, administrators could filter by groups using them as User/OU filters, but could not include group data fields in the actual report output.

With this enhancement, administrators can report on group data, as it relates to users, in combination with other existing standard and custom fields.

These fields are available to organizations using Reporting 2.0 or Custom Reports.

The following fields are added to the User section of all custom reports that contain the User section.

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Freeze Group Processing	This field displays whether group processing is frozen for the group. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>Freeze Group Processing</b> field for the <b>group</b> .	Yes/No
Group Active	This field indicates whether the group is active. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>Active</b> field for the <b>group</b> .	Yes/No
Group Description	This field displays the description of the group in which the user is a member. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>Description</b> field for the <b>group</b> .  Because the Group Description value could potentially be large, this field cannot be used as a report filter.	Text
Group ID	This field displays the ID of the group in which the user is a member. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>ID</b> field for the <b>group</b> .	Text
Group Owner Ref	This field displays the reference value for the owner of the group in which the user is a member. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>User ID</b> for the group owner.	Text

Group Owner	This field displays the owner of the group in which the user is a member. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>Owner</b> field for the <b>group</b> .	Text
Group Parent Ref	This field displays the reference value for the parent group of the group in which the user is a member. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>ID</b> field for the <b>parent group</b> .	Text
Group Parent	This field displays the name of the parent group of the group in which the user is a member. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>Name</b> field for the <b>parent group</b> .	Text
Group	This field displays the name of the group in which the user is a member. If the user belongs to more than one group, each value appears on a separate row. The value is pulled from the <b>Name</b> field for the <b>group</b> .	Text

## How Does this Enhancement Benefit My Organization?

These fields enable organizations to confirm what groups a user belongs to or to determine if training was assigned to the correct group.

## Considerations

- Because the Group Description value could potentially be large, this field cannot be used as a report filter.
- If a user belongs to more than one group, one row is added to the report for each of the user's groups.
- These fields are available to organizations using Reporting 2.0 or Custom Reports.
- The ability to report on the following items is not in scope for this enhancement:
  - Groups without users.
  - Group criteria
  - Group auditing/historical group data

## Implementation

This functionality is automatically enabled for all organizations.

## Data Load Wizard (DLW) Salary Load Deprecation in 2019

---

This is a change from the previously announced October 2018 Release retirement date.

In 2019, Cornerstone will remove the option to load Compensation data via the Data Load Wizard (DLW). The exact timing of this is yet to be determined but will be announced in advance to give clients time to plan. To load Compensation data, clients will need to use the new Edge Import Employee Salary Load tool which was made available in the August '18 Release to clients with Compensation or Cornerstone HR and Data Load Wizard (DLW).

After the October '18 Release, once the deprecation date is finalized, a message will be displayed to the DLW Salary Load interface, reminding clients of the upcoming deprecation date.



## FTP Folder Access

---

## FTP Folder Access

---

Prior to this enhancement, organizations were required to share a user account and password to access FTP accounts.

With this enhancement, the FTP Account Access page now also enables organizations to connect to their FTP account. If there is no FTP mapped to the portal, then a message is displayed to indicate this. In addition, the warning message that appears when resetting the FTP account password is updated to indicate that this does not impact users who connect to the FTP folder from within the portal.

*This functionality is available in Stage portals as of October 24. This functionality will be available in Pilot and Production portals in a post-release patch.*

## How Does this Enhancement Benefit My Organization?

---

This enhancement enables users to easily connect to their FTP folder from within the Cornerstone portal. This option automatically authenticates each user prior to accessing the folder, so users are not required to enter any login credentials. In addition, the robust security audit capabilities ensure that your organization can track who is accessing the FTP folder.

## Considerations

---

Not all organizations have an FTP account. If no FTP accounts are established for your portal, then no FTP accounts will appear on the FTP Account Access page. If you believe this is an error, please reach out to Global Product Support to set up an FTP account.

## Implementation

---

This functionality is automatically enabled for all organizations.

Upon release, the new Connect FTP Folders - Manage permission is added to the default System Administrator role. If necessary, this permission must be assigned to other roles.

## Security

---

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Connect FTP Folders - Manage	Grants ability to connect to an FTP folder from the FTP Account Access page. This permission can be constrained by FTP Account. When constraining this permission, administrators can select any FTP account that has been associated with the portal. The constraints on this permission determine to which FTP accounts the administrator can connect. This is an administrator permission.	Core

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access FTP Account - View	Grants access to the FTP account landing page where the available accounts are displayed. Currently, this permission cannot be constrained.	Core Administration
Reset Password and Public Keys - Manage	Grants ability to manage FTP account login password and public keys when applicable. Currently, this permission cannot be constrained.	Core Administration

## FTP Account Access

Prior to this enhancement, the FTP Account Access page only allowed organizations to reset the password for any available FTP accounts and view modification history.

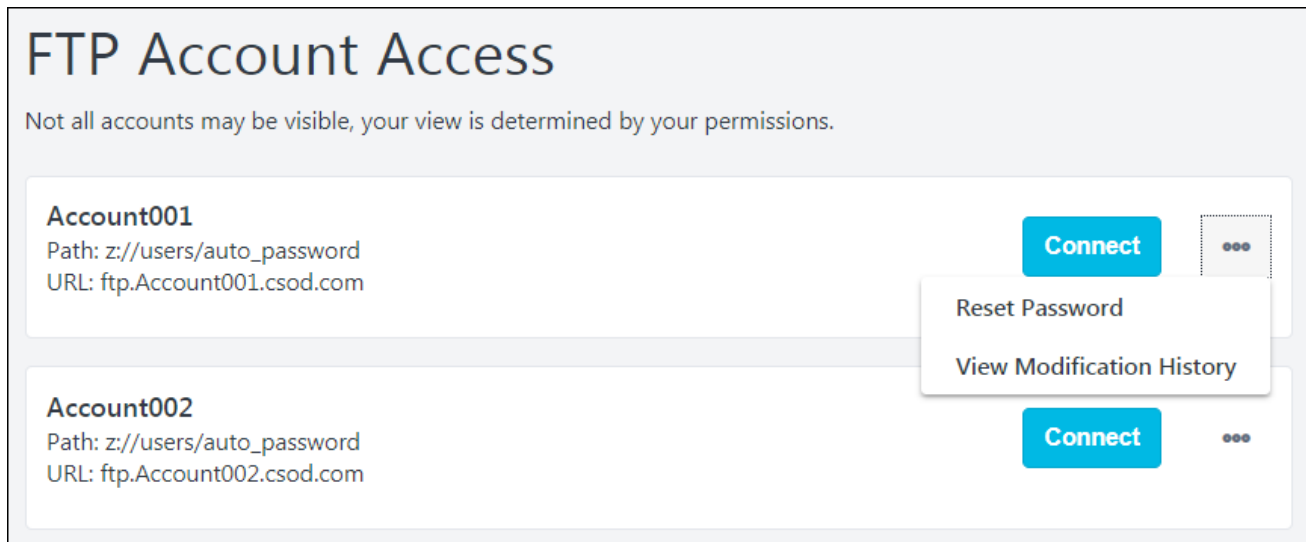
With this enhancement, the FTP Account Access page now also enables organizations to connect to their FTP account and view the history for the account. If there is no FTP mapped to the portal, then a message is displayed to indicate this.

*This functionality is available in Stage portals as of October 24. This functionality will be available in Pilot and Production portals in a post-release patch.*

To manage FTP accounts, go to **ADMIN > TOOLS > CORE** and click the **FTP Account Access** link.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access FTP Account - View	Grants access to the FTP account landing page where the available accounts are displayed. Currently, this permission cannot be constrained.	Core Administration
Connect FTP Folders - Manage	Grants ability to connect to an FTP folder from the FTP Account Access page. This permission can be constrained by FTP Account. When constraining this permission, administrators can select any FTP account that has been associated with the portal. The constraints on this permission determine to which FTP accounts the administrator can connect. This is an administrator permission.	Core
Reset Password and Public Keys - Manage	Grants ability to manage FTP account login password and public keys when applicable. Currently, this permission cannot be constrained.	Core Administration



## FTP Accounts

The FTP Account Access page displays the FTP accounts to which the administrator has access.

If there is no FTP mapped to a portal, the following message will appear: "An FTP account has not be set up and synced to this portal. If you believe this is an error, please reach out to Global Product Support to set up."

## Connect

This is a new button.

Select this button to connect to the FTP folder in a new window outside of the Cornerstone portal. This button is only available to administrators who have permission to connect to an FTP account from this page. The FTP account must also be within their permission constraints.

Because the FTP folder opens outside of the Cornerstone portal, a confirmation pop-up opens. Select the **CONTINUE** button to open the FTP folder, or select **CANCEL** to cancel the action.

Because the FTP folder opens in a new window outside of the Cornerstone portal, it is important to ensure your pop-up blocker is disabled.

## Options

The following options may be available within the options menu for each FTP account.

- Reset Password - Select this option to reset the password for the FTP account. This impacts people who need to log in to the FTP account from outside the portal. This does not impact users who access the FTP account using the **CONNECT** button.
- View Modification History - Select this option to view the history of the FTP account. This includes the password modification history and which users have connected to the account using the Connect button. This option is only available to administrators who have permission to reset passwords and public keys for the FTP account.

## FTP Account Password Reset

With this enhancement, a new Connect option may be available on the FTP Account Access page which enables administrators to connect directly to the FTP folder via the Cornerstone portal without needing to enter a password. As a result, the warning message that displays when the FTP password is being reset is updated to clarify that the Reset Password option does not impact the users who connect to the FTP folder using the Connect option.

*This functionality is available in Stage portals as of October 24. This functionality will be available in Pilot and Production portals in a post-release patch.*

To reset the password for an FTP account, go to **ADMIN > TOOLS > CORE > FTP ACCOUNT ACCESS**. Then, select the Options menu for the appropriate FTP account and select the Reset Password option.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access FTP Account - View	Grants access to the FTP account landing page where the available accounts are displayed. Currently, this permission cannot be constrained.	Core Administration
Reset Password and Public Keys - Manage	Grants ability to manage FTP account login password and public keys when applicable. Currently, this permission cannot be constrained.	Core Administration

### Prior Warning Message

You are about to make updates to the login credential of this FTP account. Please make sure all concerning parties are properly informed in advance to avoid issues such as data feed failure!

Enter your reason for change to proceed.

### New Warning Message

You are about to make updates to the login credential of this FTP account. People who need to log into this account from outside the portal will be affected. It will not affect users who log in from within the portal.

Please make sure all concerning parties are properly informed in advance to avoid issues such as data feed failure!

Enter your reason for change to proceed.

## Portal Security - WYSIWYG HTML Editor Validation Rules

---

As part of Cornerstone's ongoing commitment to client portal security and to provide a consistent user experience, we're continuing to strengthen the security where the WYSIWYG HTML Editor is used. With the August '18 Release, Cornerstone already strengthened portal security by validating that custom code on Custom and Welcome pages is within our Whitelisted Customized Elements. [See \*Whitelisted Customizable Elements\*](#).

Planned for the October '18 Release, Cornerstone will enforce these same validation rules in other parts of your portal where the WYSIWYG HTML Editor is used.

To help clients prepare for this change and to give you time to assess the impact it may have on your portal, Cornerstone pushed the validation rules to Stage environment in the September 5 stage patch deployment to give clients the opportunity to test the validation rules from September 5 until the release on October 26. If your organization has already chosen to have your portal in a less secure state, you will not be impacted by the September 5 stage patch deployment or October '18 Release.

To better understand the impact of this change or to ask additional questions, please see the [WYSIWYG HTML Editor Validation Rules](#) post in the Success Center.

### What are the supported whitelisted customized elements?

---

Please see Online Help's Whitelisted Customized Elements. [See \*Whitelisted Customizable Elements\*](#).

### How does the validation work?

---

If inserted custom code does not meet Cornerstone's validation rules, an error will show when the page is edited, copied, or created new. If existing custom code does not meet the validation rules *and* the page is not edited, the page will continue to work. Only when the page is edited, copied, or created new by an administrator does an error show, and you'll be required to update the custom code to meet the supported Whitelisted Customized Elements. [See \*Whitelisted Customizable Elements\*](#).

### What error messages will appear alerting me to an issue?

---

If existing custom code does not meet the validation rules, when the page is edited, copied, or created new the error messages may be the following:

- Due to security constraints, JavaScript has been disabled and must be removed before saving. Please contact your system administrator to enable these features.
- Due to web security concerns, only those HTML tags, attributes, etc. that have been whitelisted are supported. For the latest whitelist, please see Online Help.

### How may I be impacted?

---

The WYSIWYG HTML Editor is used throughout the Cornerstone application. Impacted pages are where an administrator can insert custom code on the WYSIWYG HTML Editor. Pages include, but are not limited to, Universal Profile, custom certifications, shopping cart,

and events & sessions. Please work with your HTML experts to review the **Whitelisted Customized Elements** list to assess if your custom code may be impacted by this change. Following the September 5 stage patch deployment, you can test your custom code on pages that have the WYSIWYG HTML Editor.

## **My organization would like to use custom code that is not included in the **Whitelisted Customized Elements** list. What can we do?**

---

In order to provide clients the flexibility of the Cornerstone platform, clients may request to disable these security settings to a less secure state. Please submit a case to Global Product Support (GPS) to request the ability to bypass WYSIWYG validation rules. This may be requested at any time, before or after the October '18 Release.

If your organization has already requested your portal to be in a less secure state (ex. Enable JavaScript), your portal will automatically bypass the validation rules and not be impacted by the new validation rules. If you are unsure, you can submit a case to GPS to inquire the status.

## **What pages use the WYSIWYG HTML Editor and will be impacted by October '18 Release?**

---

To view a full list of the pages that use the WYSIWYG HTML Editor, please see the **WYSIWYG HTML Editor Validation Rules** post in the Success Center.



## Reporting 2-0 (Early Adopter)

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## Reporting 2.0 (Early Adopter) Overview

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Reporting 2.0 is the new reporting tool for standard and custom reports. The new tool must be self-enabled and is intended to provide you with a simplistic and intuitive way to build and use reports. Enabling does not impact Standard or Custom Reports. This is a powerful new engine that delivers a single application for creating reports.

In addition to smaller enhancements, the following highlighted features are available with the October '18 release:

- **Succession** is now supported (support for Learning, Recruiting, Performance, and Extended Enterprise was introduced as part of previous releases). This does not include Succession Comment Logs fields but does include the following custom fields:
  - User Career Preferences
  - Incumbent (Incumbent and User Succession Metrics)
  - Successor (Successor, Successor Fields, and Successor Succession Metrics)
  - Position Criteria
  - Job Pool Task
- **Exception Reporting - Learning (Transcripts)**
- **Pre-Built Templates**
- **Aliasing**
- **Additional Fields** (Course Interaction, **User Fields [Groups]**)
- **Usability Enhancements**
- **Removal of Redundant Permissions**

For detailed information about creating and viewing reports, see the following existing topics in Online Help:

- **Reporting 2.0 - Homepage**
- **Reporting 2.0 - Create Report**
- **Reporting 2.0 - Report Viewer**

**Click here to download the Reporting 2.0 (Early Adopter) starter guide.**

**Note:** You will continue to have full access to standard and custom reports following **self-enablement** of this functionality in your portal.

### [Reporting 2.0 - Early Adopter Details](#)

Reporting 2.0 (Early Adopter) is intended to give you a chance to get familiar with the tool in your Production and/or Pilot environment before it is made generally available (GA) in a future release. Early Adopters can build both ad hoc reports and report templates with their data by adding columns, specifying filter logic, and specifying filter properties.

While all clients are encouraged to be a part of the Reporting 2.0 (Early Adopter), it is important to make sure the features meet your needs. The following are a few components of an Early Adopter:

- **Experienced in building Custom Reports**

- The Early Adopter will build report templates and share them with other users. These other users do not necessarily need to be experienced in building Custom Reports as they will simply be using templates and downloading reports.
- **My portal has User and Learning, Recruiting, Performance, Extended Enterprise, or Succession Data**
  - Compensation is not fully supported at this time.
- I understand that not all existing Custom Reporting features are currently available in the Early Adopter but **I am eager to start using the features that are available now**

## Use Case

### **Anna Administrator**

1. As Anna Administrator, I build and maintain reports for my organization.
2. I am most interested in the filter properties because I can:
  - A. Make it easier for Viewers to know which criteria to set.
  - B. Hide confusing filters.
  - C. Limit how Viewers interact with filters.
3. I build reports and bring in my favorite standard and custom fields.
4. I share reports with other users and let them know they have a new report.
5. I spend the most time making sure the filter logic is correct and easy to use.

### **Vicky Viewer**

1. As Vicky Viewer, I run reports for my team.
2. I do not have the create permission, thankfully, because I am too busy to learn how to build reports.
3. I love running report templates others have built for me. I change a couple filters like date.
4. If I need something complex changed in the report, I will talk to Anna Administrator and ask her to change it for me.

## Considerations/Exclusions

The following features are not available with the October '18 release but may be available as part of a future release:

- Exception Reports:
  - Exceptions on all standard training & transcript fields
  - Exceptions on custom fields
  - Exceptions for other modules
- System Templates for standard reports not explicitly listed
- Compensation module support
- Charting - Export as native Excel Chart
- Dashboards
- Calculations
- Custom Fields for:

- SF-182
- Folders
- Succession Comment Log - **Note:** *These features may be added in a future release.*

### Implementation

Succession data and all other enhancements for the October '18 release will be available in Stage portals on October 4.

The Reporting 2.0 functionality must be self-enabled. For self-enablement information, [See Enable Reporting 2.0](#) on page 158 *for additional information..* All clients can opt-in to Early Adopter in Stage, Pilot, and Production portals.

Each 2018 Early Adopter client should have a stakeholder experienced with building custom reports. The stakeholder(s) should build report templates and share them with other users. The other users do not need Custom Reports experience, as they will simply be using templates and downloading reports. **Note:** *Without a stakeholder with fair to moderate Custom Report experience (or comparable experience with a reporting/analytics tool), the user experience may not be as successful.*

### Security

The Reporting 2.0 functionality is controlled by a series of permissions that allow you to create more specific reports by report field. For this reason, permissions are at more of a granular level with this functionality.

The permissions are broken down by the main product level permission, section level, and then at the field level. For example, if you wanted to report on Instructor Led Training (ILT) in the system, you would need:

- The Reporting - Manage permission to create reports.
- The Reporting - View permission to preview reports and view reports.

You would also need:

- The top-level product specific permission to create reports related to that product.
  - e.g. Reporting - Learning - Manage
- The section specific permission to create reports for that feature within the product.
  - e.g. Reporting - Learning - ILT - Manage
- The field level permissions to be able to create reports with the specific fields for that feature within the product.
  - e.g. Reporting - Learning - ILT - ILT Facility - Manage

If a user does not have each level of permission, then they may not have access to the report builder, or the section may not be visible, or the fields within the section may not be visible. Also, if a user does not have the top-level product permission, then none of the fields for that product will be visible, such as the fields for LMS reports.

The power of this granularity of permissions is that you can give access to as many or as few fields as necessary for your users. For example, you may give users access to the User

section but not give them access to the User Identifier section if that contains sensitive data for your portal.

## Reporting 2.0 List of Permissions

---

For the full list of new and existing permissions and their relationships, [see the permissions spreadsheet in Online Help](#).

Note: The permissions spreadsheet will be updated upon implementation of these enhancements on 26 October 2018.

## Permission Constraints

---

Constraints exist at the section level for permissions. At this time, the following constraints are available:

- OU
- User's OU
- User Self and Subordinates
- User's Direct Report
- User
- Learning-specific constraints:
  - Provider
  - Training Item
  - Training Type
- Requisition-specific constraints:
  - User's Division
  - User's Position
  - User's Location
  - Division
  - Position
  - Location

## Pre-Built Templates Permission

---

The new *Reporting - System Templates* permission grants users the ability to use all pre-built templates. Pre-built templates are available for generating certain Learning, Core, and Performance data. Users with this permission will also be able to use any new templates that are added in future releases, provided that they still have the permission.

This permission works in conjunction with other Reporting 2.0 permissions. For example, users without the *Reporting - Learning - View* permission will not see any pre-built templates for Learning.

For the October '18 release, this permission will be added to the Cornerstone Administrator and System Administrator security roles in all portals that have self-enabled Reporting 2.0. New clients opting in after this release will also have this permission added automatically to these security roles.

## Sharing Reports Created with a Pre-Built Template

When you share a report that was creating using a template, the shared users will be able to view the report without needing to be granted the *Reporting - System Templates* permission. The permission is only needed for administrators who should distribute templates to their users.

## Removal of Redundant Permissions

---

With the October '18 Release, redundant permissions have been removed. For sections that do not have field groups underneath (e.g., User is a section, Security is a field group under User), there is no need for a field group permission. **Note:** *For clarification, the field level permissions are the permissions that are needed to see the field groups under each section of fields on the Data panel.*

The following redundant permissions have been removed:

- Reporting - Learning - Training Request Forms - Training Request Forms - Manage
- Reporting - Learning - Training Request Forms - Training Request Forms - View

There is no action needed with this change and there should be no change to reports. The only visible change will be the removal of the permissions. Removal of other redundant permissions will be done at a later time.

## Enable Reporting 2.0

**Note:** Reporting 2.0 is currently in the Early Adopter development stage, and it is currently only available to organizations using Learning, Recruiting, Performance, and Extended Enterprise.

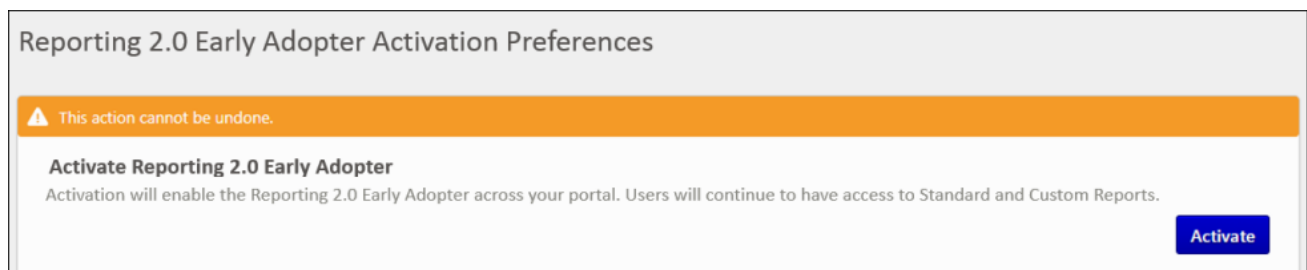
Reporting 2.0 must be self-enabled in your portal in order for the functionality to be available for users. Once enabled, users must also be assigned the permissions necessary to access and use the new report builder.

Each October 2018 Early Adopter client should have a stakeholder experienced with building custom reports. The stakeholder(s) should build report templates and share them with other users. The other users do not need Custom Reports experience, as they will simply be using templates and downloading reports. **Note:** Without a stakeholder with fair to moderate Custom Report experience (or comparable experience with a reporting/analytics tool), the user experience may not be as successful.

## Self-Enablement

Administrators who are at the CESadmin level may complete the following steps to enable Reporting 2.0:

1. Navigate to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > SYSTEM PREFERENCES > REPORTING 2.0 ACTIVATION PREFERENCES**.



2. Click the **ACTIVATE** button on the Reporting 2.0 Activation Preferences page. This opens a confirmation pop-up.
3. Click **ACTIVATE** on the pop-up to activate Reporting 2.0. This returns you to the activation page. A green success message appears if activation is successful.

Once the functionality has been activated, the activation cannot be undone. The activation will have no impact to standard or custom reports. All of your existing standard and custom reports and their settings will still be available. Any shared reports are also available. Existing permissions for standard and custom reports will still be available and remain assigned to users.

**Note:** You can click **CANCEL** in the confirmation pop-up if you do not want to activate Reporting 2.0 at this time. You can return to the activation page when you are ready to activate Reporting 2.0.

**Note about Copydowns:** *If you request a copydown from a portal without Reporting 2.0 activated, please also request that the activation page be re-enabled. You will need to re-enable (e.g., if you are enabled in Stage but not Pilot/Production, and copydown, you will have to re-enable in Stage.)*

## Supported Environments

---

The following environments are supported:

- **Stage** - All clients may opt-in to Early Adopter.
- **Pilot** - All clients may opt-in to Early Adopter.
- **Production** - All clients may opt-in to Early Adopter.

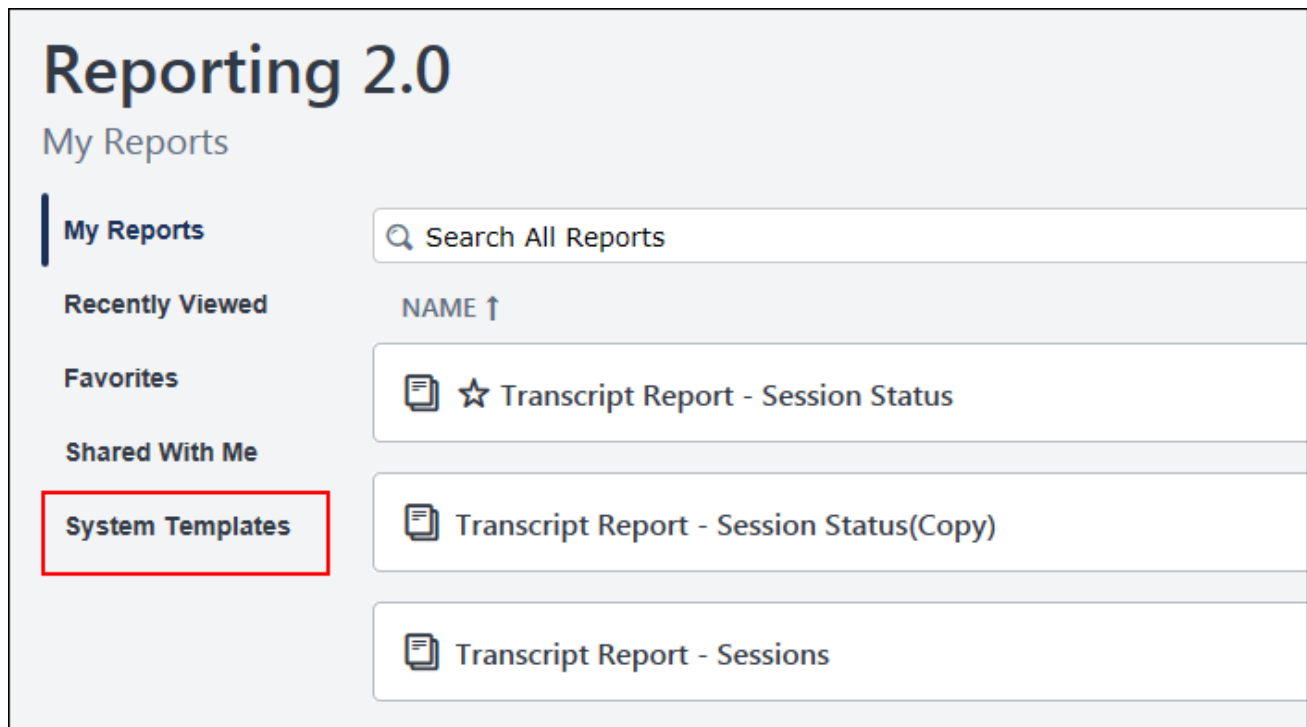


## System Templates

With this release, templates have been added to Reporting 2.0 so that you can quickly and easily create reports for some of the most commonly generated Learning, Core, and Performance data. Templates are not exactly rebuilt standard reports; they are modern templates that answer similar business questions as the standard reports after which they were modeled.

These templates are intended to be a starting place for administrators to copy and customize to meet the needs of their organization. The templates available with the October '18 Release represent a significant percentage of standard report usage and were chosen based on a combination of this usage and features currently available in Reporting 2.0.

- Templates cannot be deleted or edited. Templates can be copied, and once the template is copied, you can edit the settings such as fields and filters.
- Templates will show Cornerstone Administrator as the owner.
- More templates will be added in future releases.



## Available Templates for the October '18 Release

The following templates are available with this release:

### Learning

- Enterprise Training
- Online Training Status
- Past Due
- Records (Transcript)

- Training Progress Summary Pie Chart
- Transcript Status

### Core

- Records (User)

### Performance

- Goal Status
- Task User Status (Competency)
- Task User Status (Performance)

## How to Use Templates

---

Pre-built templates are available from the Reporting 2.0 homepage by clicking the **System Templates** link. This will open a list of templates that are available to you.

Users must have the *Reporting - System Templates* permission in order to create templates. All templates will be available for users with this permission, based on the functionality that is enabled in the portal. For example, Performance templates are only available in portals that have Performance enabled.

Pre-built templates are similar to the Standard Report that each template is modeled after. Many of the fields and filters will be the same as what you would find in the Standard Report.

To use a template, simply open the template from the System Templates page, and the report results will display at the bottom of the page. The fields and filter values will be pre-populated.

The following images show the Past Due report template. The pre-selected filters display at the top, and the report results automatically populate at the bottom of the page.

Reporting 2.0 REFRESH

## Past Due

Displays employees past due training.

**Filters**

AND

OR

AND

Transcript Registration Date is between [default value] and [default value]

AND

Training Type is not one of Session

OR

Training Start Date is between [default value] and [default value]

AND

Training Type is one of Session

Training Title is one of Select Training 0 selected.

Training Provider is equal to [default value]

Training Type is one of Select...

Removed from Transcript? is No

1249 records

User Full Name ↑	User ID	Training Type	Training Title	Training Version	Division	Position	Training Provider	Transcript Status	Transcript Regist...	Training Start Date
Hill, Ruth	rhill	Online Class	The Five Cardinal Sins	3.0.1	Sales6	Sales Manager	You Achieve.com	Approved / Past Due		
Hill, Ruth	rhill	Online Class	The Five Cardinal Sins	3.0.1	Sales6	Sales Manager	You Achieve.com	Registered / Past Due	1/24/2017 6:17 PM	
Howard, Brad	bhoward	Material	Business Communicat	1.0	HR1	HR Generalist	External Training	Registered / Past Due	9/26/2016 12:18 PM	
Howard, Brad	bhoward	Online Class	Getting the Most Out	3.0.1	HR1	HR Generalist	Element K	Approved / Past Due		
Howard, Brad	bhoward	Online Class	Having Tough Talks	3.0.1	HR1	HR Generalist	Element K	Registered / Past Due	9/23/2016 4:08 PM	

## Frequently Asked Questions

### [How can I make changes to the fields in a template?](#)

The templates themselves cannot be modified, meaning that the fields cannot be deleted and new fields cannot be added. Filters cannot be added or deleted. The name and description cannot be changed.

However, you can copy the template, which will essentially create a new report and allow you to modify the new report by adding/removing fields and filters and making any other desired changes.

### [What if I never want to customize a template by copying it?](#)

If you will not need to customize templates and would like all users to have the latest version of the template (depending on enhancements as part of quarterly and patch releases), you can:

- Share the template with other users.

- Grant the Reporting - System Templates permission to users who should have access to all templates.

## Exception Reporting for Transcripts

---

Exception filters for Transcript reports are now supported with Reporting 2.0. With exception filters, you can opt to include or leave out certain data so that your report gives you the results you need. For example, you can generate a list of every user in the system and find out whether or not they have taken a specific training.

The option to use exception filters is only visible to users who have Reporting 2.0 User, Training, and Transcript permissions. The following permissions are needed:

- Reporting - Core
- Reporting - Core - User
- Reporting - Learning
- Reporting - Learning - Training
- Reporting - Learning
- Reporting - Learning - Transcript

## What Is the Benefit of Exception Filters?

---

The majority of reports let you combine user data with other data, such as finding out who has taken what training. This makes it difficult to find out who has **not** taken training or to find other information that is not yet on the user record. Other reports, such as the Training Report, do not contain any user data. Exception filters let you create reports to find the exceptions, i.e., people who have or have not done something.

Exception filters are also incredibly beneficial for compliance purposes. A common use case for reporting is to find out who has and has not completed training. Prior to this enhancement, it was necessary to create two separate reports to obtain this information. Then, the report results needed to be compared in Excel in order to get a complete picture. With exception filters for Transcript reports, you can now get this information in a single report.

## What Exception Filters Are Available?

---

The Exception Filters section has a preset list of standard Training and Transcript fields that are available to use as an exception, such as Training Title.

The following Training fields are available as exception filters:

- Course Code
- Course Publication Title
- Created By (Name)
- Created By (User ID)
- Curriculum Title (Training)
- Curriculum Version (Training)
- DMS Status
- Equivalent Subject
- Equivalent Training Object ID
- Equivalent Training Title
- Equivalent Training Version

- Event Number
- Inside Curriculum
- Interest Tracking Allowed
- Keyword
- Language Equivalent Training Object ID
- Language Equivalent Training Title
- Language Equivalent Training Version
- Last Modified By
- Last Modified By (User ID)
- Last Modified Date
- Latest Version
- Material Type Active
- Material Type Name
- Material URL
- Max score
- Mobile Compatible
- Multiple Session Enrollment Allowed
- Number of Attempts Allowed (Tests)
- Product/Commodity Code
- Session Cost
- Session Cost Type
- Training Created Date
- Training Deactivation Date
- Training Description
- Training End Date
- Training Hours
- Training ID
- Training Locator Number
- Training Max Registration
- Training Min Registration
- Training Object ID
- Training Provider
- Training Purpose
- Training Reference Number
- Training Reg Deadline
- Training Start Date
- Training Status
- Training Subject
- Training Title
- Training Type
- Training Version


[The following Transcript fields are available as exception filters:](#)

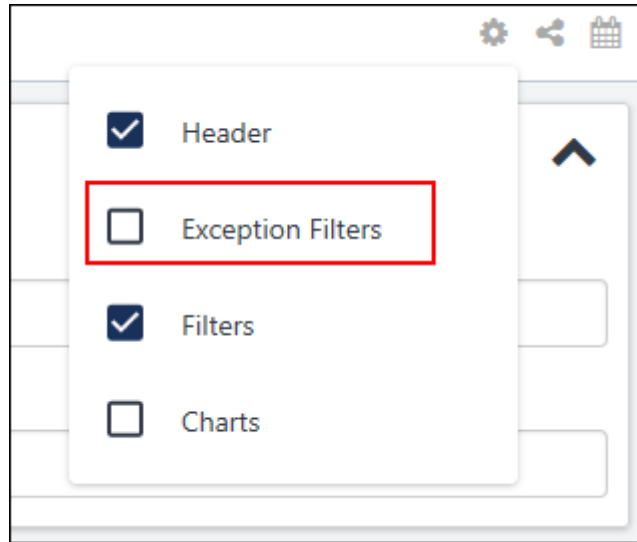
- Archived from Transcript?
- Assigned
- Available Date
- Cancellation Reason
- Completed SCOs %
- Curriculum Completion Percentage
- Exempted By(ID)
- Curriculum Latest Registration?
- Curriculum Title (Transcript)
- Curriculum Version (Transcript)
- Exemption Date
- From Training Plan?
- Greatest Registration Number
- Last Transcript Status Change Date
- Latest Registration Number?
- Registration Number
- Removal Reason
- Removed from Transcript?
- Required
- Session Withdrawal Date
- Suggested
- Transcript Assigned Date
- Transcript Completed Date
- Transcript Due Date
- Transcript Due Date (Curriculum)
- Transcript Edited By (User ID)
- Transcript Edited Date
- Transcript Last Modified Date
- Transcript Registration Date
- Transcript Removed Date
- Transcript Score
- Transcript Status
- Transcript Status (from Curriculum)
- Transcript Status Group
- Transcript Time in training (min)
- User's Course Review
- Withdrawal Reason

### Where Can I Find the Exception Filters Section?

To use exception filters, you will need to add the Exception Filters section to the Builder tab each time you would like to add exception filters to a new report. To do this:

1. Make sure you are building a Transcript Report and have User, Training, and Transcript permissions.

2. Make sure you have not added any fields from any other field group to your report, as you will not be able to build an exception report until you have removed these fields.
3. Click the cog wheel  on the Builder tab.
4. Check the **Exception Reports** box from the drop-down. The Exception Filters section will now appear on the Builder tab.



## How Do I Add Fields to the Exception Filters Section?

---

You can add fields as exception filters by doing one of the following:

- Click the box in the Exception Filters section and select a filter from the list. You can enter keywords in the box to search for the filter you need.
- Drag and drop a field from the Table Columns section to the Exception Filters section.
- Drag and drop a field from the Data panel to the Exception Filters section.

## How Do I Configure Exception Filters?

---

With exception filters, you can narrow down your report results by finding who has and/or has not taken training.

Just like the filters in the Filters section, you can select an operator for each individual filter and define the value or values for the filters. For example, if you would like to find out which users completed a certain online course, you can:

1. Add the Training Title exception filter
  - A. Select the "is one of" operator
  - B. Select the specific training on which you want to report
2. Add the Transcript Status exception filter
  - A. Select the "is one of" operator
  - B. Select "Completed" and any other transcript status you would like to include
3. Add the **User Full Name**, **Training Title**, and **Transcript Status** fields to the report



Exception Filters

AND

Training Title

is one of

Select Training

1 selected.

Transcript Status

is one of

× Completed

× Not Started

×

Click to add a filter or drag over a data field

## Properties for Exception Filters

Additional options are available in the Report Properties panel for exception filters.

The following options are available:

- **Exception only** - Select this option to only include users who have NOT taken the training.
- **Exception and All** - Select this option to include both users who have not taken the training AND who have taken the training.

168

Properties
×

### Report Properties

Data Map: No Data Map

RESET

☒ Show/count unique rows only

☐ Show Field Prefixes

#### Exception Reporting

☒ Exception only

☐ Exception and All

#### Column sorting

Click to add a column to sort or  
drag over a data field

## Select Training Flyout

The Select Training flyout that opens when adding the **Training Title** field as a filter does not return inactive trainings or old versions of trainings.

Also, when you select an Event in the Select Training flyout, Sessions will not display in the report output. To return results for Sessions, you can use the Training Title filter such as Starts With.

## Aliasing

---

Aliasing introduces the concept of user relationships to Reporting 2.0. With this release, aliasing lets you create reports with Manager, Indirect Manager, and Successor and Incumbent data that goes beyond simply the manager's name, email, and user ID. These relationships are added as aliases so that you can pull in other user fields for them, such as the User Address of the manager or indirect manager.

**Note:** *Successor custom fields continue to follow Successor custom field availability, and Incumbent custom fields continue to follow User custom field availability.*

## How to Use Aliasing

---

With the Aliasing feature, you will now see the following new sections under the User section:

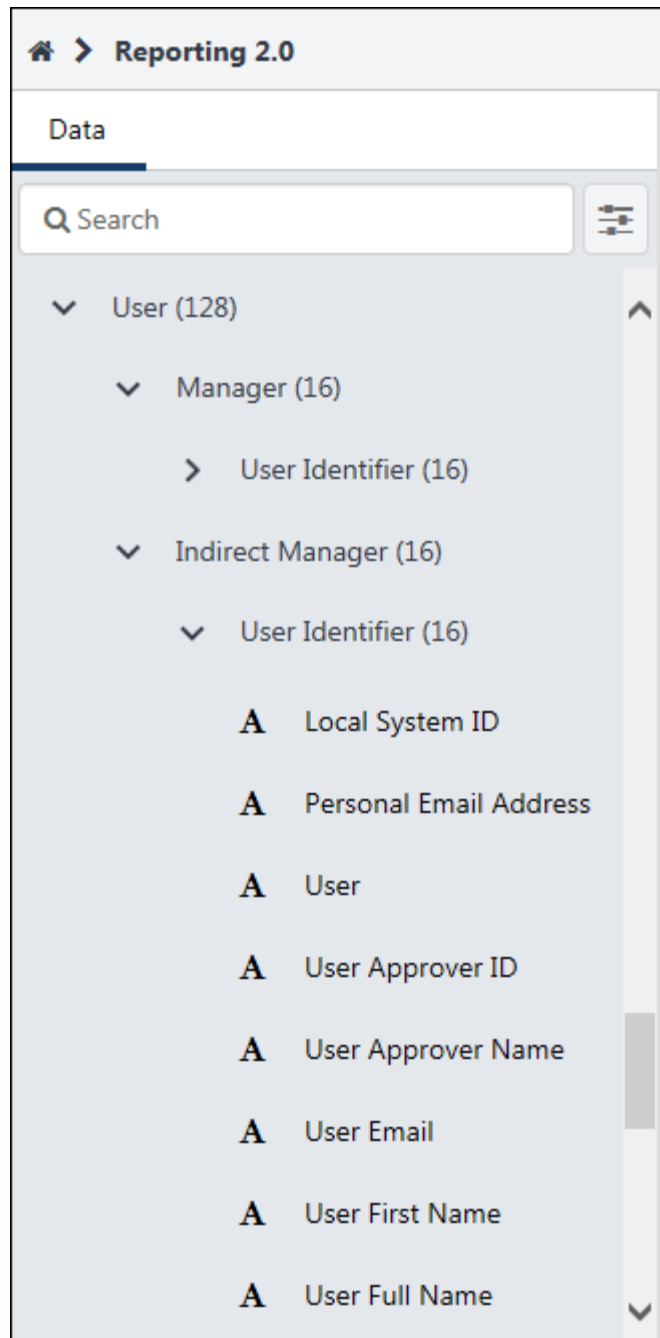
- Manager
- Indirect Manager

In addition, users with Succession will now see the following new field groups:

- Incumbent
- Successor

The Manager and Indirect Manager sections will only include fields from the User Identifier section. The Incumbent and Successor sections will contain all standard and custom User fields.

When you add fields from these sections, the data will automatically apply to users who are identified for these sections. For example, if you would like the names and email addresses of all managers, you can add fields such as **User Full Name** and **User Email** from the User Identifier section. Since these fields are within the overall Manager section, they will only return results for users who are Managers.



In addition, the following fields are being removed from the User > User Identifier field group since the fields are now available in the Manager section:

- User Manager Email
- User Manager First Name
- User Manager ID
- User Manager Last Name
- User Manager Name

## Permission Considerations

---

Aliasing will obey Reporting - Core - User permissions. For example, if someone does not have the Reporting - Core - User Identifier - Manage permission, they would not see the User > User Identifier section or the User > Manager > User Identifier section.

## General Enhancements

---

In addition to support for Succession data and the addition of **Pre-Built Templates**, **Exception Reporting for Transcripts**, and **Aliasing**, the following smaller enhancements for the October '18 release are intended to improve the user experience for Reporting 2.0:

### Permissions

---

#### [New Permission to Use Pre-Built Templates](#)

The new *Reporting - System Templates* permission grants users the ability to use all pre-built templates. Pre-built templates are available for generating certain Learning, Core, and Performance data. Users with this permission will also be able to use any new templates that are added in future releases, provided that they still have the permission.

This permission works in conjunction with other Reporting 2.0 permissions. For example, users without the *Reporting - Learning - View* permission will not see any pre-built templates for Learning.

For the October '18 release, this permission will be added to the Cornerstone Administrator and System Administrator security roles in all portals that have self-enabled Reporting 2.0. New clients opting in following this release will also have this permission added automatically to these security roles.

#### **Sharing Reports Created with a Pre-Built Template**

When you share a report that was creating using a template, the shared users will be able to view the report without needing to be granted the *Reporting - System Templates* permission. The permission is only needed for admins who should distribute templates to their users.

#### [Removal of Redundant Permissions](#)

With the October '18 Release, redundant permissions have been removed. For sections that do not have field groups underneath (e.g., User is a section, Security is a field group under User), there is no need for a field group permission. **Note:** *For clarification, the field level permissions are the permissions that are needed to see the field groups under each section of fields on the Data panel.*

There is no action needed with this change and there should be no change to reports. The only visible change will be the removal of the permissions. Removal of other redundant permissions will be done at a later time.

In the list below, Column 3 shows the name of each removed permission. Columns 1 and 2 show the existing permissions that will remain and allow access to the fields that were previously only available with the field level permission. For users who currently have the permissions in Columns 1 and 2, you will continue to have those permissions and will now be able to access the fields using only the product and section level permissions.

<b>REMAINING PRODUCT LEVEL PERMISSION</b>	<b>REMAINING SECTION LEVEL PERMISSION</b>	<b>REMOVED FIELD LEVEL PERMISSION</b>
<b>COMPENSATION</b>		
Reporting - Compensation	Reporting - Compensation - Compensation	Reporting - Compensation - Compensation - Compensation
Reporting - Compensation	Reporting - Compensation - Compensation Audits	Reporting - Compensation - Compensation Audits - Compensation Audits
Reporting - Compensation	Reporting - Compensation - Current Compensation	Reporting - Compensation - Current Compensation - Current Compensation
<b>COMPETENCY</b>		
Reporting - Competency	Reporting - Competency - Checklists	Reporting - Competency - Checklists - Checklists
Reporting - Competency	Reporting - Competency - Competency	Reporting - Competency - Competency - Competency
<b>CONNECT</b>		
Reporting - Connect	Reporting - Connect - Community	Reporting - Connect - Community - Community
Reporting - Connect	Reporting - Connect - Community New	Reporting - Connect - Community New - Community New
Reporting - Connect	Reporting - Connect - Connect Profile	Reporting - Connect - Connect Profile - Connect Profile
Reporting - Connect	Reporting - Connect - Posting	Reporting - Connect - Posting - Posting
Reporting - Connect	Reporting - Connect - Posting New	Reporting - Connect - Posting New - Posting New
Reporting - Connect	Reporting - Connect - Topic	Reporting - Connect - Topic - Topic
Reporting - Connect	Reporting - Connect - Topic New	Reporting - Connect - Topic New - Topic New
<b>CORE</b>		
Reporting - Core	Reporting - Core - OU	Reporting - Core - OU - OU
Reporting - Core	Reporting - Core - Peers	Reporting - Core - Peers - Peers

<b>REMAINING PRODUCT LEVEL PERMISSION</b>	<b>REMAINING SECTION LEVEL PERMISSION</b>	<b>REMOVED FIELD LEVEL PERMISSION</b>
Reporting - Core	Reporting - Core - Social Feedback	Reporting - Core - Social Feedback - Social Feedback
<b>FORMS</b>		
Reporting - Forms	Reporting - Forms - Form Tasks	Reporting - Forms - Form Tasks - Form Tasks
<b>LEARNING</b>		
Reporting - Learning	Reporting - Learning - Assignment	Reporting - Learning - Assignment - Assignment
Reporting - Learning	Reporting - Learning - Certifications	Reporting - Learning - Certifications - Certifications
Reporting - Learning	Reporting - Learning - Compliance	Reporting - Learning - Compliance - Compliance
Reporting - Learning	Reporting - Learning - Evaluations Report	Reporting - Learning - Evaluations Report - Evaluations Report
Reporting - Learning	Reporting - Learning - On The Job Training	Reporting - Learning - On The Job Training - On The Job Training
Reporting - Learning	Reporting - Learning - SCO Data	Reporting - Learning - SCO Data - SCO Data
Reporting - Learning	Reporting - Learning - SCORM 2004 Quiz Data	Reporting - Learning - SCORM 2004 Quiz Data - SCORM 2004 Quiz Data
Reporting - Learning	Reporting - Learning - Test Report	Reporting - Learning - Test Report - Test Report
Reporting - Learning	Reporting - Learning - Training Request Forms	Reporting - Learning - Training Request Forms - Training Request Forms
<b>PERFORMANCE</b>		
Reporting - Performance	Reporting - Performance - Performance Review Competency and Assessment Sections	Reporting - Performance - Performance Review Competency and Assessment Sections - Performance Review Competency and Assessment Sections
Reporting - Performance	Reporting - Performance - Goals	Reporting - Performance - Goals - Goals
Reporting - Performance	Reporting - Performance - Performance Review	Reporting - Performance - Performance Review Goal Rating Section - Performance

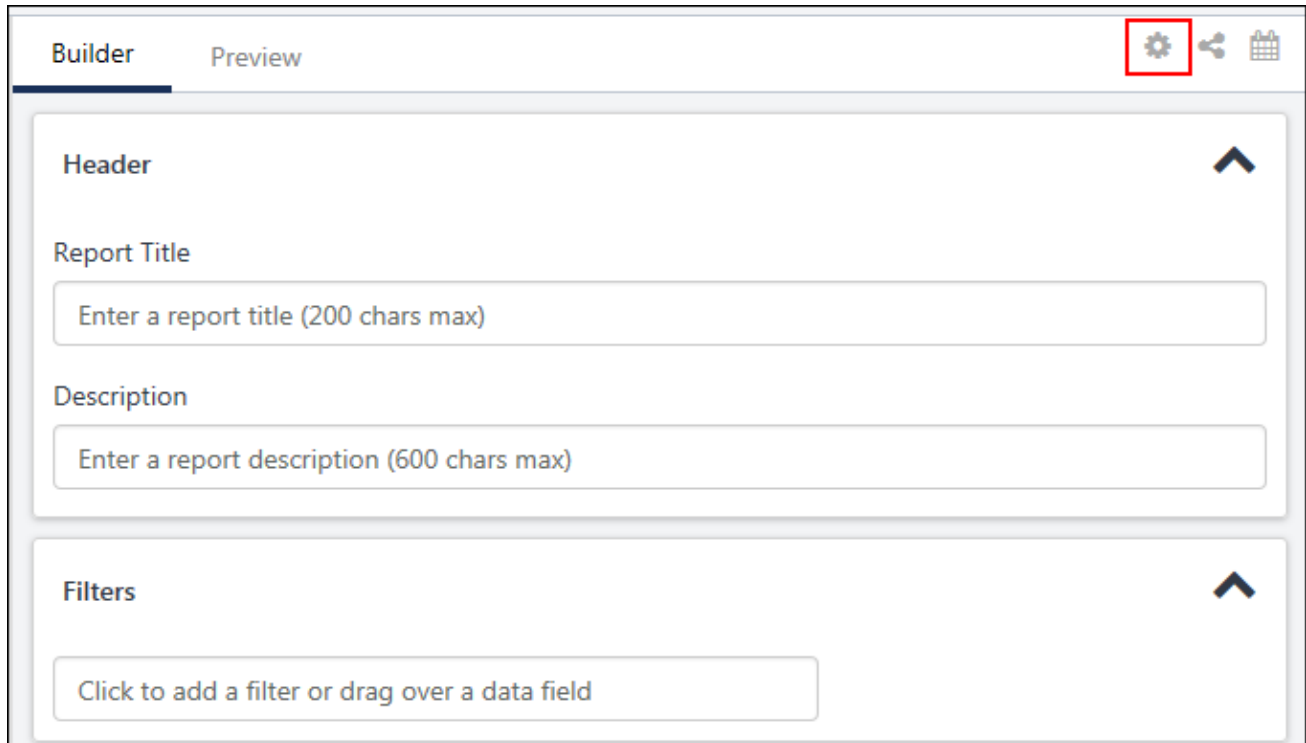


<b>REMAINING PRODUCT LEVEL PERMISSION</b>	<b>REMAINING SECTION LEVEL PERMISSION</b>	<b>REMOVED FIELD LEVEL PERMISSION</b>
	Goal Rating Section	Review Goal Rating Section
Reporting - Performance	Reporting - Performance - Performance Review Question	Reporting - Performance - Performance Review Question - Performance Review Question
Reporting - Performance	Reporting - Performance - Performance Review Section	Reporting - Performance - Performance Review Section - Performance Review Section
Reporting - Performance	Reporting - Performance - Performance Review Sign-Off	Reporting - Performance - Performance Review Sign-Off - Performance Review Sign-Off
Reporting - Performance	Reporting - Performance - Performance Review Step	Reporting - Performance - Performance Review Step - Performance Review Step
<b>RECRUITING</b>		
Reporting - Recruiting	Reporting - Recruiting - Application Forms	Reporting - Recruiting - Application Forms - Application Forms
Reporting - Recruiting	Reporting - Recruiting - Background Check	Reporting - Recruiting - Background Check - Background Check
Reporting - Recruiting	Reporting - Recruiting - Compliance Questions	Reporting - Recruiting - Compliance Questions - Compliance Questions
Reporting - Recruiting	Reporting - Recruiting - External Assessments	Reporting - Recruiting - External Assessments - External Assessments
Reporting - Recruiting	Reporting - Recruiting - External Vendor(s)	Reporting - Recruiting - External Vendor(s) - External Vendor(s)
Reporting - Recruiting	Reporting - Recruiting - Historical Status	Reporting - Recruiting - Historical Status - Historical Status
Reporting - Recruiting	Reporting - Recruiting - Pre-Screening Questions	Reporting - Recruiting - Pre-Screening Questions - Pre-Screening Questions
Reporting - Recruiting	Reporting - Recruiting - Selection	Reporting - Recruiting - Selection - Selection
<b>RESUME</b>		
Reporting - Resume	Reporting - Resume - Resume	Reporting - Resume - Resume - Resume
<b>SUCCESSION</b>		

<b>REMAINING PRODUCT LEVEL PERMISSION</b>	<b>REMAINING SECTION LEVEL PERMISSION</b>	<b>REMOVED FIELD LEVEL PERMISSION</b>
Reporting - Succession	Reporting - Succession - Job Pool Task	Reporting - Succession - Job Pool Task - Job Pool Task
Reporting - Succession	Reporting - Succession - Position Criteria	Reporting - Succession - Position Criteria - Position Criteria
Reporting - Succession	Reporting - Succession - Successor	Reporting - Succession - Successor - Security
Reporting - Succession	Reporting - Succession - Succession Task	Reporting - Succession - Succession Task - Succession Task
Reporting - Succession	Reporting - Succession - Task Review Fields - Successors	Reporting - Succession - Task Review Fields - Successors - Task Review Fields - Successors
Reporting - Succession	Reporting - Succession - User Career Preferences	Reporting - Succession - User Career Preferences - User Career Preferences

## Cog Wheel

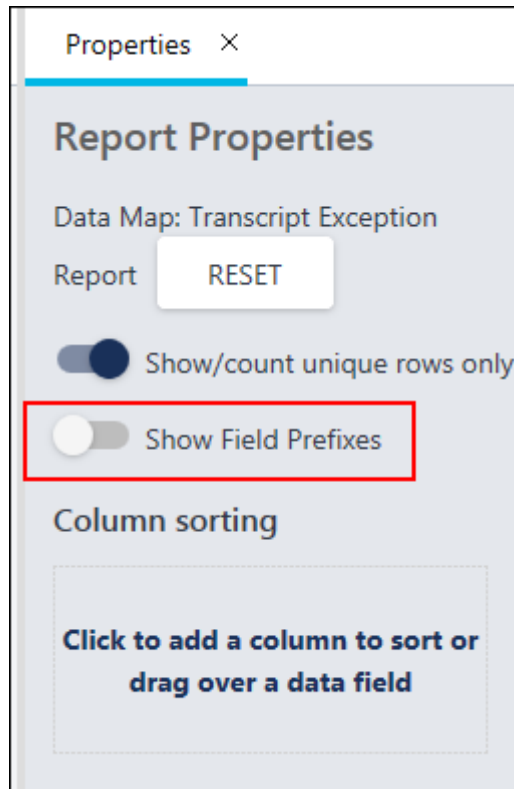
A cog wheel is added to the upper-right corner of the Builder tab to let you hide or display the Header, Exception Filters, Filters, and Charts sections that appear on the tab. Hiding these sections on the Builder tab does not impact the visibility of the data entered into these sections nor the **Report Viewer** experience.



## Field Name Prefixes

To avoid confusion when fields in different sections have the same or similar names, Reporting 2.0 is prefixing fields with the section name from which they have been added. For example, the **User Full Name** field exists for User, Successor, and Incumbent sections. Previously, this field simply displayed as “User Full Name” Now, when including this field in a report from the User section, the field will display as “User - User Full Name” to indicate that it came from the User Section.

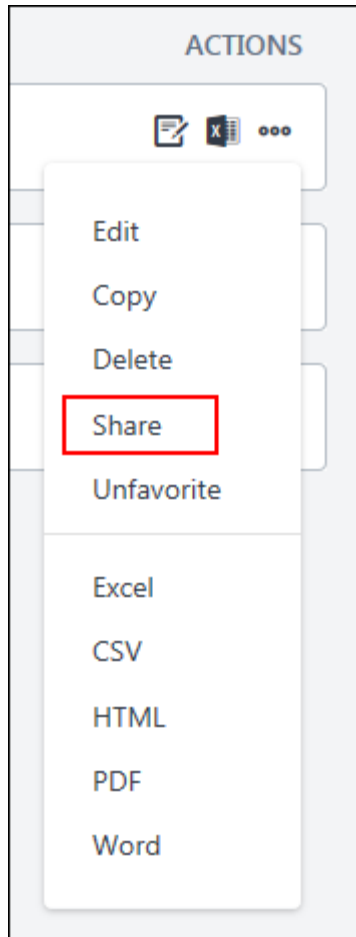
You can enable or disable this feature by toggling it on or off in the Properties panel. The feature is on and cannot be turned off if there are two fields with the exact same name in your report (e.g., **User Full Name** from User and **User Full Name** from Manager).



## Sharing from Home Page

You can now share reports directly from the Reporting 2.0 homepage. A **Share** option is available from the options drop-down in the Actions column and lets you select organizational units (OU) and users with whom to share the report.

For more information about sharing reports and for detailed instructions, [See Share Report.](#)



## New Sections in the Data Panel

New sections are added to the Data panel to provide additional fields for reporting. The following sections are added in addition to **the sections that are detailed for Aliasing**:

- Course Interaction
- Talent Pool - **Note:** *This section was previously available only for Recruiting data. This is now available for Recruiting and/or Talent Pools for Succession.)*

Additional sections and fields are added with this release to provide more reporting options in Reporting 2.0.

## Data Map Enhancement (Available as of 7 September 2018)

Prior to this enhancement, if a report with no fields was previewed by a user, the user would see a list of all data maps in the system in the preview.

With this enhancement, users only see a data map when they have the permission to view at least ONE of its sections. For example, a user with permissions for Reporting, Learning, and Training will be able to view fields for Assignment, Certification, and Training, but they will not be able to view fields for Compensation or Performance, etc. Regardless of which data map the user chooses, users will only see field columns based on their permissions.

## Existing Fields Added for the October '18 Release

The following existing fields are now available in Reporting 2.0:

### Applicant

FIELD NAME	SECTION
Referral Bonus Applies	Applicant > Referral
User-specific Comment	Applicant > Recruiting Agency

### Assignment

FIELD NAME	SECTION
Assignment User Criteria (OU Owner - Name)	Assignment
Assignment User Criteria (OU Owner - User ID)	Assignment
Assignment User Criteria (OU Parent)	Assignment
Assignment User Criteria (OU ID)	Assignment
Assignment User Criteria (OU Type)	Assignment
Assignment User Criteria (User ID)	Assignment

### Certifications

FIELD NAME	SECTION
Certification Contact (Email)	Certifications
Certification Active	Certifications
Certification Language	Certifications
Certification Modified Date	Certifications
Certification Owner (User ID)	Certifications
Certification Prerequisite - Certification Title	Certifications
Certification Prerequisite - Training Object ID	Certifications
Latest Reinstate Date	Certifications
Latest Reinstate Comments	Certifications
Latest On Hold Date	Certifications
Latest On Hold Comments	Certifications
Certification On Hold?	Certifications

### Community New

FIELD NAME	SECTION
------------	---------

FIELD NAME	SECTION
Community ID	Community New

### Competency

FIELD NAME	SECTION
Competency Max Rating	Competency

### Development Plan

FIELD NAME	SECTION
Dev Plan Activity Type	Development Plan
Dev Plan Objective Category	Development Plan

### Goals

FIELD NAME	SECTION
Goal Creation Date	Goals
Goal Deleted	Goals
Goal Active	Goals
Difficulty to Achieve	Goals

### ILT

FIELD NAME	SECTION
Part Start Date	ILT > Part Details

### Interview Management and Scheduling

FIELD NAME	SECTION
Scheduled Interview - Does Interview Guide Require Ratings?	Interview Management and Scheduling > Scheduled Interview
Scheduled Interview - Interview Guide Target Score to Advance	Interview Management and Scheduling > Scheduled Interview
Scheduled Interview - Interview Guide Calculated Score	Interview Management and Scheduling > Scheduled Interview
Scheduled Interview - Interview Guide Name	Interview Management and Scheduling > Scheduled Interview
Scheduled Interview - Interviewer ID	Interview Management and Scheduling > Scheduled Interview

FIELD NAME	SECTION
On Demand Video Interview - Interviewer ID	Interview Management and Scheduling > On Demand Video Interview

## Nominations

FIELD NAME	SECTION
Nomination List User Status	Nominations > Details
Nomination List Action	Nominations > Modification History
Nomination List Name	Nominations > Details
Nomination List Action Date	Nominations > Modification History
Nomination List Changed By	Nominations > Modification History
Nomination List Changed User	Nominations > Modification History
Nomination List Added Date	Nominations > Details

## Pre-Screening Questions

FIELD NAME	SECTION
Response Required?	Pre-Screening Questions

## Requisition

FIELD NAME	SECTION
Requisition Owner - Name	Requisition > Details
Requisition - Posting Type	Requisition > Details
Hiring Manager - Email	Requisition > Details
Requisition Primary Owner - Email	Requisition > Details
Referral Bonus Amount	Requisition > Details
Requisition Number of Days on Hold	Requisition > Details
Requisition Taken Off Hold Date	Requisition > Details
Requisition Hold Date	Requisition > Details



FIELD NAME	SECTION
Requisition Creation Date	Requisition > Details
Requisition Request Review Date	Requisition > Details

### SCO Data

FIELD NAME	SECTION
Score Max	SCO Data
Score Min	SCO Data
Progress Measure	SCO Data
Score Raw	SCO Data
Score Scaled	SCO Data

### Successor

FIELD NAME	SECTION
Display Language - #{Successor}#	Successor > Details
User Gender - Successor	Successor > Details

### Successor Fields

FIELD NAME	SECTION
User ID - Successor	Successor Fields > Details

### Talent Pool

FIELD NAME	SECTION
Talent Pool Action	Talent Pool > Modification History
Talent Pool Commenter	Talent Pool > Details
Talent Pool Comments	Talent Pool > Details

### Topic New

FIELD NAME	SECTION
Topic ID	Topic New

### Training

FIELD NAME	SECTION
------------	---------

FIELD NAME	SECTION
DMS Status	Training > Training Details
Withdrawal Deadline	Training > Training Details
Equivalent Training Object ID	Training > Training Details
Equivalent Training Version	Training > Training Details
Language Equivalent Training Object ID	Training > Training Details
Language Equivalent Training Title	Training > Training Details
Language Equivalent Training Version	Training > Training Details
Mobile Compatible	Training > Training Details
Cohort Instructor Name	Training > Training Details
Cohort Section Title (Training)	Training > Training Details
Cohort Title (Training)	Training > Training Details
Program Title	Training > Training Details
Prerequisite Training Title	Training > Training Details

### Transaction

FIELD NAME	SECTION
Transaction Approver ID	Transaction > Details
Transaction Training Provider	Transaction > Details
Transaction Training Title	Transaction > Details
Licenses Available	Transaction > License
Transaction Approver ID	Transaction > Details

### Transcript

FIELD NAME	SECTION
Part Name	Transcript
Transcript Roster Commented Date	Transcript
Transcript Last Modified Date	Transcript
Transcript Time in Training	Transcript
User's Course Review	Transcript
Training Purpose Category	Transcript
Transcript Status Group	Transcript
Latest Registration Number?	Transcript

FIELD NAME	SECTION
User Attended Part?	Transcript
Transcript Edited Date	Transcript
Transcript Edited By (User ID)	Transcript
Transcript Edited By (Name)	Transcript
Transcript Roster Commented By (User ID)	Transcript
Transcript Roster Commented By (Name)	Transcript
Transcript Time in training (min)	Transcript
Cohort Section Title (Transcript)	Transcript
Cohort Title (Transcript)	Transcript
Past Due Aging	Transcript
Exemption Reasons (Exemptor)	Transcript
Exemption Reasons (User)	Transcript
Transcript Status Group	Transcript

### User Career Preferences

FIELD NAME	SECTION
Job Interests	User Career Preferences

### User

FIELD NAME	SECTION
Rehired employee	User > User Status Information
Personal Email Address	User > User Identifier
User Home Phone	User > Contact Information
User Job ID	User > Security
User Job	User > Security
User Ethnicity	User > Security
User Gender	User > Security
User Company Number	User > Details
User Indirect Manager Id	User > User Identifier
User Indirect Manager Email	User > User Identifier
User Indirect Manager Last Name	User > User Identifier
User Indirect Manager First Name	User > User Identifier

FIELD NAME	SECTION
User Indirect Manager ID	User > User Identifier
User Indirect Manager Name	User > User Identifier

## Retirement of Current Workday Integration in March 2019

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Last year, Workday announced the deprecation of its Cornerstone integration templates on March 9, 2019. Don't worry, we've got you covered.

Our Edge-ready integration, scheduled for Fall 2018, will replace existing functionality, including:

1. Core Data (Users & Organization Units) Inbound integration from Workday to Cornerstone
2. Completed Transcripts Outbound Integration from Cornerstone to Workday

We aren't going to stop with existing capabilities. We are going to make this integration even better and easier to use with the following planned enhancements.

1. Core Data Inbound Integration Enhancements:
  - Ability to run the integration on demand
  - Support Organization Type Hierarchies for Standard OUs
  - Differentiate between Employees and Contingent Workers
  - Support User Record Custom text fields
2. Completed Transcripts Outbound Integration
  - Ability to exclude users from the integration
  - Ability to run the integration on demand
  - Ability to exclude transcripts for certain LOs
  - Support loading a contingent worker's completed transcript in Workday

See **Workday Core Data Inbound Integration** on page 234 *for additional information*.

See **Workday Transcript Outbound Integration** on page 236 *for additional information*.

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

Impacting only clients using Reporting API, Replicated Data Warehouse, and Data Exporter, the following Real-Time Data Warehouse categories will be impacted or deprecated, and the updates made may break applications, scripts, or functionality based on earlier versions of RTDW objects.

Documentation that describes RTDW views and fields used in Custom Reports will be posted and updated in the [RTDW Documentation for Reporting API, RDW, and Data Exporter Community](#). Join and follow the community to be notified of new posts.

This table describes the deprecated objects that are still available in RTDW. These objects are scheduled to be removed in a future release (May '19). Do not use these deprecated objects in new development work, and modify applications that currently use these deprecated objects as soon as possible.

CATEGORY	OBJECT	DESCRIPTION	REMOVAL DATE
Training and Transcript	report.vw_rpt_lo_text_local	report.vw_rpt_training_local	May '19 Release
Job Pool; Succession; Performance Review; Competency; Compensation	report.vw_rpt_task_local	report.vw_rpt_task_local2	May '19 Release
Job Pool; Succession; Performance Review; Competency; Compensation; Onboarding and Forms; Training Forms	report.vw_rpt_task_status_local	report.vw_rpt_task_status_local2	May '19 Release
Performance Review	report.vw_rpt_task_review_rating_local	report.vw_rpt_task_review_rating_local2	May '19 Release
Job Pool; Succession	report.vw_rpt_smp_task_review_local	report.vw_rpt_smp_task_review_local2	May '19 Release
Performance Review	report.vw_rpt_task_review_step_local	report.vw_rpt_task_review_step_local	May '19 Release

## Welcome Page Preferences - Remove Customization Option

## Welcome Page Preferences - Remove Customization Option

Prior to this enhancement, if a Welcome page were customized for an organizational unit, the only way to remove the customization and have the organizational unit inherit the Welcome page settings from its parent organizational unit was to edit the parent organizational unit's settings and choose the option to overwrite custom settings for all child organizational units. This process was not intuitive, required multiple steps, and would also overwrite any customization for any other child organizational units.

With this enhancement, if a Welcome page is customized for an organizational unit (OU), administrators can now remove the custom settings from the OU's Welcome page. This action can be done when editing the settings for that OU. When the custom settings are removed, the OU's Welcome page inherits the settings from the parent OU.

When editing the Welcome Page Preferences for an OU that has custom settings, the **Remove Customization** link appears below the page description and above the *Availability* section.

### How Does this Enhancement Benefit My Organization?

This functionality enables administrators to easily restore a custom welcome page so that it is no longer custom.

### Considerations

This enhancement only impacts Welcome pages, and it does not impact Custom pages.

### Implementation

This functionality is automatically enabled for all organizations.

### Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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



## Welcome Page Preferences

---

With this enhancement, if a Welcome page is customized for an organizational unit (OU), administrators can now remove the custom settings from the OU's Welcome page. This action can be done when editing the settings for that OU. When the custom settings are removed, the OU's Welcome page inherits the settings from the parent OU.

When editing the Welcome Page Preferences for an OU that has custom settings, the **Remove Customization** link appears below the page description and above the *Availability* section.

To set Welcome Page Preferences, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > WELCOME PAGE**. Then, select the appropriate OU.

### [Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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



IT1

Configure preferences for the Welcome Page below. To further customize it by additional criteria, use the Availability Criteria drop-down. If a user belongs to multiple availability criteria in addition to the default view, the Welcome Page version defined by the first criterion (the oldest) below the default will be applied on user login.

Remove Customization  
Download SharePoint Web Parts

**Availability**

Add Criteria ▼

Availability	Options
Default: All users in Division: IT1 (IT1)	 

**Preview**

Welcome, {FIRSTNAME} {LASTNAME}, to Learning Portal.

**Your Inbox**

Your Inbox Item  
Your Inbox Item Details

**Your Tasks**

	Due Date
Your Tasks Item	10/11/2018
Your Tasks Item	10/11/2018
Your Tasks Item	10/11/2018

**Your Assigned Training**

	Due Date	Action
Your Assigned Training Item	10/11/2018	Action
Your Assigned Training Item	10/11/2018	Action
Your Assigned Training Item	10/11/2018	Action

**Online Training in Progress**

	Action
Training in Progress Item	Action
Training in Progress Item	Action
Training in Progress Item	Action

☐ Overwrite custom settings previously saved for child Divisions. (If unchecked, the preferences will still be applied to any child Divisions that are either new or currently inherit the parent settings.)

Save Cancel

## Remove Customization

When the **Remove Customization** link is available, it appears below the page description and above the *Availability* section.

The **Remove Customization** link is only available when editing the Welcome Page Preferences for an OU that has customized settings, which means that the OU is not inheriting the settings from its parent OU. Administrators can identify whether the OU has custom settings when selecting the OU for which you are editing the Welcome page. If there are custom settings for the OU, then "(Custom)" is displayed next to the OU. If there are not custom settings for the OU, then the parent OU name is displayed.

Select the **Remove Customization** link to remove the customized preferences for the OU and any child OUs that currently inherit the settings. Any child OUs that have different customizations are not affected by this action. When this link is selected, a confirmation pop-up is displayed. Select **OK** to remove the customizations, or select **CANCEL** to continue utilizing the customized preferences. **Caution:** Removing customization from an OU cannot be reversed.

qa05.csod.com says

You are about to remove the customized preferences for this OU, and it will re-inherit the preferences from its parent OU. This will also apply to all the Child OUs that currently share the same customization. There is no reversal to this action. Please note that Child OUs with different customizations will not be affected.

OK

Cancel

## Cornerstone HR

---

## e-days Absence Management - View Entitlement Balance and Absence History

---

## e-days Absence Management - View Entitlement Balance and Absence History

---

With this release, the e-days Absence Management integration is enhanced. Organizations that use e-days for absence management can now leverage this integration to enable users to quickly view their entitlement balances and absence history via a new My Absence Home dashboard. Users can also easily access their e-days account to request absences from their dashboard. This new dashboard is located within Universal Profile.

*The My Absence Home page was released with the August 17, 2018 patch. The Request Absence button and My Requests section were released with the September 28, 2018 patch.*

### Use Cases

---

1. Andy is the administrator for Acme Corporation. Acme wants to use the e-days Absence Management integration, as they have employees who need to view their entitlement balances and absence history.
2. Recognizing the need from his organization, Andy purchases and enables the e-days Absence Management integration.
3. With the integration active, Acme employees now have the ability to view entitlement balances and absence records from within the Cornerstone application.
4. Marie is an employee at Acme Corporation. She has been busy traveling all year and has taken quite a few vacation days from her annual entitlement.
5. Marie thinks she has some vacation days remaining, but she is unsure how much.
6. Curtis is Marie's brother, and he is getting married on Thursday, June 14 at an out-of-town destination.
7. Curtis would be heartbroken if his sister could not attend due to an insufficient vacation balance.
8. Marie need to take three days from her vacation balance to travel and attend the wedding. She's just not sure how much time she can be away from work.
9. Marie needs to understand how much time is left in her holiday balance. She goes to her Absence Home page.
10. Marie can see that she has the days in her vacation balance to attend Curtis' wedding.

### Considerations

---

- To use the Absence Management integration, organizations must also be e-days clients and have previously activated the e-days Absence Management integration in Edge.
- Requesting and approving absences will still occur within e-days.
- Entitlement balances will display as either days or hours depending on how they are displayed in e-days.

## Implementation

The e-days Absence Management integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This integration is available for organizations using the Cornerstone HR (CHR) functionality that also use e-days for absence management and have already enabled the Absence Management - SSO and User Sync integration.

*The My Absence Home page was released with the August 17, 2018 patch. The Request Absence button and My Requests section were released with the September 28, 2018 patch.*

## Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Absence Management - Absence Home - View	Users with this permission can view the Absence Home page from the Universal Profile. Currently, this permission should only be used by organizations that are using the e-days Absence Management integration. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates.	Limited Use/Obsolete

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Universal Profile - My Absence Home

*The My Absence Home page was released with the August 17, 2018 patch. The Request Absence button and My Requests section were released with the September 28, 2018 patch.*

For organizations that have enabled the e-days Absence Management integration, a My Absence Home page is available within the Universal Profile. This page enables users to view their entitlement balances, such as Vacation balances and Sick Day balances. Users can also request an absence from this page.

The various widgets that appear on this page display the different entitlement types that are available to the user, and they vary between organizations. Entitlement balances display as either days or hours depending on how they are displayed in e-days.

To access the My Absence Home page, go to **HOME > UNIVERSAL PROFILE**. Then, click the Absence tab. **Note:** The location of this link is configurable by your system administrator.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Absence Management - Absence Home - View	Users with this permission can view the Absence Home page from the Universal Profile. Currently, this permission should only be used by organizations that are using the e-days Absence Management integration. This permission can be constrained by OU, User's OU, User, and User Self and Subordinates.	Limited Use/Obsolete



The screenshot shows the 'My Absence Home' dashboard for a user named Marie Schneider. The dashboard is divided into three main sections: Vacation, Sick Days, and Flexible Days. Each section displays a circular progress indicator showing the number of days remaining or used. Below these sections, there is a 'My requests' section with a dropdown menu for 'By Status'. Two requests are listed: 'Time-Off Request: Maria Schendier' (Approved) and 'Time-Off Request: Maria Schendier' (Pending).

Entitlement Type	Days Remaining	Days Used	Days Pending
Vacation	6	6	0
Sick Days	-	5	-
Flexible Days	0	4	0

Request ID	Requester	Date Requested	Status
1	Maria Schendier	9/17/2017 - 9/25/2017 (8 Days)	Approved
2	Maria Schendier	9/17/2017 - 9/25/2017 (8 Days)	Pending

## Request Absence

Select the **REQUEST ABSENCE** button to submit a request for time off. This opens the e-days system and automatically logs the use.

## Widgets

The various widgets that appear on this page display the different entitlement types that are available to the user, and they vary between organizations. Entitlement balances display as either days or hours depending on how they are displayed in e-days.

## My Requests

This section displays the user's previously requested absences, including the status of each request.

## Forms - Before & After Changes for Approvers

Before this enhancement, form approvers had to search other areas of the system to find the previous value for the change that they were asked to approve.

With this enhancement, when a form approver is reviewing a form that has updated values, they can see the current value next to the submitted value.

**Division Change for Marissa Andrews**
Options ▼

This is to be completed by the manager at least one week prior to the employee division change.

\* = Submitted field value has been changed from current value.

	Current Value	Submitted Value
First Name	Marissa	Marissa
Last Name	Andrews	Andrews
*Position	Associate	Manager (Manager)
*Division	Sales	Acme (Acme)

Approval Comment (optional)

Cancel
Deny
Deny and Return
Approve

## How Does this Enhancement Benefit My Organization?

This enhancement ensures that employee data is accurate and traceable, which is a vital part of the forms data collections process. Displaying current data next to changed data allows clients to easily see changes before approving a form.

## Use Cases

1. Heather in HR approves internal transfers for Acme Corp.
2. Ernie, a Sales Manager at Acme Corp, is transferring from Chicago, Illinois to Paris, France. As part of his move, he completed all his company's internal transfer documents.
3. Heather can see that Ernie currently lives in Chicago and is moving to Paris, so she does not approve Ernie's form until he completes his Visa documentation.

## Considerations

---

- This enhancement applies only to forms with approval workflows.
- This enhancement applies to both effective dated and non-effective dated forms.
- Changes that happen between form submission and form approval are reflected on the form's before/after snapshot.
- The "Changed From" and "Changed To" fields only appear if there is a change to approve.

The lists below display the fields that can display the "Current" and "Submitted" values.

### **Non-effective dated (ED) form fields that can display "Current" values**

- User Standard Fields
  - Checkbox
  - Radio buttons
  - Date fields
  - Drop-down
  - Encrypted short text box
  - Numeric
- User Custom Fields
  - Short text
  - Checkbox
  - Radio buttons
  - Date fields
  - Drop-down
  - Scrolling text box
  - Multi-checkbox
  - Numeric
- Organizational Units (OUs)
  - Standard OUs
  - Custom OUs
- Employee Relationships (ERs)
  - Standard
  - Custom

### **Question Bank Fields**

- Checkbox
- Date Picker
  - Month/Year
  - Month/Day/Year
- Dropdown
  - Single Select
  - Multi Select
- Text

- Small
- Medium
- Large
- Multiline
- Numeric
- Radio

**Note:** Attachment fields will not display a "Current" value in non-ED forms.

### Effective Dated Form Fields that can Display "Current" Values

- User Standard Fields
  - Custom
- User Custom Fields
  - Short text
  - Checkbox
  - Radio Buttons
  - Drop-down
  - Scrolling text box
  - Multi-checkbox
  - Numeric
- Organizational Units (OUs)
  - Custom OUs
- Employee Relationships (ERs)
  - Standard
  - Custom

**Note:** Attachment and Question Bank fields will not display a "Current" value in ED forms.

### Implementation

---

This functionality is automatically enabled for all organizations using Forms.

## Edge

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## ADP Workforce Now Single Sign-On (SSO)

Prior to this enhancement, organizations were required to submit a request to Cornerstone to configure and enable single sign-on (SSO) from ADP Workforce Now (WFN) to Cornerstone.

With this enhancement, a new ADP Workforce Now Single Sign-On integration is now available from the Edge Marketplace. This enables organizations to quickly purchase, configure, and enable the integration.

**Note:** Organizations that have already implemented SSO from ADP to Cornerstone do not need to purchase and enable this integration.

*This functionality will be available in a post-release patch.*

### Configuration

When configuring the integration, enter the following information:

- ADP Client ID

### Implementation

The ADP Workforce Now Single Sign-On integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This integration is available to all organizations. Organizations must have an existing ADP Workforce Now contract. Organizations that have an existing SSO integration from ADP to Cornerstone do not need to install this integration or migrate.

### Security

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission	Edge

cannot be constrained. This is an administrator permission.	
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## Assessment Connector Enhancements

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With this enhancement, organizations can select which fields are sent to their assessment provider during the integration setup in Edge. In addition, organizations can send additional fields to the assessment vendor during the initial request, eliminating the need for manual entry. This includes the following fields:

- Timestamp of when assessment order request is initiated (backend field)
- Integration order ID (backend field)
- Candidate GUID (backend field)
- Candidate language preference
- Candidate type
- First and last name of the primary owner of the job requisition to which the candidate has applied
- Email address of the primary owner of the job requisition to which the candidate has applied
- Display job title of the job requisition to which the candidate has applied
- Country of the job requisition to which the candidate has applied
- State of candidate address

Lastly, candidate resume data is removed in the initial request payload to respect privacy and prevent sending unnecessary data to the assessment provider. This includes the following fields:

- Professional Experience
- Education
- Certifications

## How Does this Enhancement Benefit My Organization?

---

These enhancements provide greater data security and compliance to regulations such as GDPR. Organizations can control which fields are sent to the assessment provider. Lastly, these enhancements improve usability by preventing redundant data entry in Cornerstone and the organization's assessment provider.

## Implementation

---

This functionality is automatically available to use with new and existing integrations that are built using the Assessment Connector.

For organizations with an existing integration that was built using the connector, it is necessary to contact the assessment vendors to inform them of the enhancements to ensure that they are properly utilized and do not negatively impact their current integration.

New integrations can be enabled and configured via Edge Marketplace and Integrations. Organizations must have an existing contract with a third-party assessment vendor. During the setup, the organization completes the credentials section and chooses the fields to



enable and send over to the assessment provider when an assessment request is submitted. Organizations provide the list of selected fields to their assessment provider. For more information about the Assessment Connector, see the API Explorer in Edge.

## Permissions

---

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge - API Explorer	Grants access to the API Explorer, which provides access to help documentation for various API applications.	Edge

## PayPal Payment Gateway (Early Adopter) - Enhancements

## PayPal Payment Gateway Integration

---

The PayPal Payment Gateway integration supports transaction management features, eliminating the need to perform additional bookkeeping for refunds. This functionality includes automatic refunds for users who withdraw from sessions.

### Use Cases

#### Use Case 1: Manual Refund

---

Ian is the business process owner and administrator at ACME Corporation, which is a well-known provider of software engineering courses. ACME uses Extended Enterprise to sell the content, and have enabled the PayPal Payment Gateway integration.

Ian receives a message from a customer about an accidental purchase. He is able to refund the customer's transaction from within the Cornerstone application, allowing him to later report on this transaction if needed.

#### Use Case 2: Automated Refund

---

Nazeema is the business process owner and administrator at ACME Corporation, which is a well-known provider of software engineering courses, including instructor-led training (ILT) sessions. ACME uses Extended Enterprise to sell the sessions, and Nazeema is able to add PayPal as an accepted payment method using the PayPal Payment Gateway integration because it is capable of supporting ACME's automated refund policies.

### Considerations

---

- In order to perform refunds for PayPal transactions, the new Client ID field and Client Secret field must be added to the integration. Otherwise, attempting to initiate a refund for a PayPal transaction will result in an error. **See Obtain Client ID and Client Secret from PayPal** on page 316 *for additional information*.
- In order to use the PayPal payment gateway with the system, the default currency of the portal defined via Currency Preferences must be supported by PayPal. See: <https://developer.paypal.com/docs/integration/direct/rest/currency-codes/>
- The client logo set in the Cornerstone system is provided to PayPal to facilitate a consistent experience for users. **See PayPal Payment Gateway (Early Adopter) - Enhancements** on page *for additional information*.

## PayPal Payment Gateway Integration Enablement

---

To enable the PayPal Payment Gateway integration for your organization:

1. Add the PayPal Payment Gateway integration from the Edge Marketplace. To access the Edge Marketplace and specific information about the integration, go to: **ADMIN > TOOLS > EDGE** and click the **Marketplace** link.
2. Configure the integration via Edge Integrate. To access Edge Integrate, go to: **ADMIN > TOOLS > EDGE** and click the **Integrate** link.
3. Create a PayPal business account. **See Create PayPal Business Account** on page 318 *for additional information*.

4. Add PayPal as a payment account in the learning management system (LMS). [See PayPal Payment Gateway - Define Payment Account](#) on page 319 *for additional information*.
5. Enable PayPal as a payment method in User Payment Preferences.

**Note:** The backend setting for the PayPal Payment Gateway must be turned on in your portal in order for PayPal to be used as a payment method. This setting is automatically enabled when you install and configure the PayPal Payment Gateway integration.

## 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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
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
Transaction Manager - Manage	Grants ability to access the Manage Transaction page and also create and edit transactions. On the Order History Details page, the administrator can edit the order status, adjust prices, issue refunds, or enter comments. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration

## Create PayPal Business Account

---

If your organization does not currently have a PayPal business account, you can begin creating a business account either by phone or via the internet.

### Configure Business Account by Phone

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To create a PayPal business with the help of a PayPal employee, please use the following contact information:

Nichol Daniel

Sr. Inbound Account Executive

Contact Hours: 8am-5pm M-F CST

Phone: (402) 952-8539

Email: ndaniel@paypal.com

### Create Business Account Online

---

If you do not currently have a PayPal account, you can create a business account by navigating to: <https://www.paypal.com/bizsignup/#/checkAccount>

1. Enter the email address that should be associated with the business account. PayPal will verify the email address is not already in use.
2. Create a password for the business account.
3. Provide the name of a business contact, a business name, a business phone number, the business address, and tax ID number.
4. When PayPal asks how your organization will process credit cards, select the **On your Website** option, and then select the **Process all payments, including debit and credit cards, through PayPal** option.
5. After completing the above steps, please email your Business Account email address to ndaniel@paypal.com, and a PayPal employee will ensure your account is configured correctly for use with the Cornerstone system.

## Obtain Client ID and Client Secret from PayPal

Prior to configuring the PayPal Payment Gateway integration, an organization must have a PayPal business account. To retrieve the **Client ID** and **Client Secret** values required for configuring a payment account in Cornerstone:

1. Go to: <https://developer.paypal.com/developer/applications/> and log in with your PayPal business account credentials.
2. Navigate to the My Apps & Credentials tab and click the **CREATE APP** button in the REST API Apps section. This allows the Cornerstone system to authenticate with PayPal and process refunds.
3. Name the application (this does not impact the integration) and associate the sandbox test account.
4. Click the **CREATE APP** button.
5. The App will be created and the administrator can copy the **Client ID** and **Secret** from this page for the sandbox environment into the Modify Payment accounts page in their Cornerstone Stage environment. **Note:** *These values do not expire, but they can be disabled by an administrator if needed.*

The screenshot shows the PayPal Developer console for an application named 'CSOD Test'. The left sidebar contains navigation links for Dashboard, My Apps & Credentials, My Account, Sandbox (Accounts, Notifications, API Calls, IPN Simulator, Webhooks Events), Mock (Webhooks Simulator, Credit Card Generator), and Live (API Calls, Webhooks Events). The main content area is titled 'CSOD Test' and has 'Sandbox' and 'Live' tabs. Under 'Sandbox API CREDENTIALS', it shows the 'Sandbox account' as 'jnguyen-facilitator@csod.com'. The 'Client ID' is 'AXCzcmwIHQzu7w6ecXH4IZiML-VPXot8metcsZMwbaX1TkP9w3b8ol7-h5HrB9NEmpV-MPVmoeVgdjB'. The 'Secret' is hidden. A note states: 'When you generate a new secret, you still maintain the original secret. The maximum number of client secrets is two. A client secret is either in enabled or disabled state.' Below this is a table with one entry:

Created	Secret	Status	Action
Jul 10, 2018	ECrc8Gb6FEMoJJSc5kCc00V4CmHiu1pixE2mXPwmyixbzROt8mTDtoyIEmy6Z_xCpbX7vTd99r73_Tk	Enabled	...

There is a 'Generate New Secret' button. Below the table is a section for 'Sandbox Webhooks' with the text: 'Configure webhooks to notify your app when certain events occur. To configure a webhook, define your'.

In order to view the **Client ID** and **Secret** values for the Cornerstone Production environment, click the Live tab in the upper-right of the PayPal business account page and repeat step four in the Cornerstone Production environment.

The screenshot shows the PayPal Developer dashboard for an application named "CSOD Test". The left sidebar contains navigation links for Dashboard, My Apps & Credentials, My Account, Sandbox, Mock, and Live. The main content area is titled "CSOD Test" and features a "Sandbox" button and a "Live" button, with the "Live" button highlighted by a red rectangular box. Below the buttons, the "App display name" is "CSOD Test". The "LIVE API CREDENTIALS" section includes a note about live transaction features, the PayPal account "jnguyen@csod.com", the Client ID "AXB7703oIKCMjJOW4a2adbfnbFiSwSm0izxNnaONp16PMk110bk0L2Dsr47ZITuQrTkSwEjP6YKicPF", and the Secret "Show". The "LIVE WEBHOOKS" section provides instructions on configuring webhooks to receive notifications.

## PayPal Payment Gateway - Define Payment Account

On the Define Payment Account page, administrators can configure the payment account for their PayPal business account. With this enhancement, the following additional fields are available in the PayPal Information section of this page:

- Client ID
- Client Secret

To access the Define Payment Account preferences page, go to **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > E-COMMERCE** and click the **Modify Payment Account** link. In the Payment Account section, click the Add icon to add a new payment account.

### Permissions

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

**Define Payment Account**

**Define Payment Account**

Name: HS Paypal Sandbox

Description:

**DEFINE CRITERIA**

**DEFINE PAYMENT GATEWAY**

PayPal

**PAYPAL INFORMATION**

Please enter PayPal information. The Client ID and Client Secret are generated by creating an app using PayPal Developer Tools.

Merchant Account ID: dp\_buyer\_pp\_US\_1524073361001324@paypal.com

Client ID: AdTe6iUCT7v9t\_NKxByvux7Mgw6LG4Wv8cw3SfF0OKKpuUT\_G4

Client Secret: EFO677h9xOC9Kd1xyFcusawYTjJN7iUEXkdHGGa\_k4Srv06DML

**MODIFICATION HISTORY**

Save Cancel

### PayPal Information

In the PayPal Information section, the administrator can populate the following fields:

- **Merchant Account ID** - Provide the email address or merchant account ID associated with your organization's PayPal business account. This field is required.



- **Client ID** - Provide the Client ID associated with your organization's PayPal business account. This field is required.
- **Client Secret** - Provide the Client Secret associated with your organization's PayPal business account. This field is required.

Access your PayPal information from the My Apps & Credentials tab of your PayPal Developer account. [See Obtain Client ID and Client Secret from PayPal](#) on page 316 *for additional information.*

Click the **SAVE** button to finish configuring the PayPal payment account.

For more information about creating a payment account: [See Create Payment Account.](#)

## PayPal - Automatic Refunds

If a session was purchased using PayPal, and the **Automate Refund Using Refund Terms** option is enabled, existing system refund logic is respected and the session is automatically refunded due to the user withdrawing from the session.

If the refund is successful, the related refund information is reflected in the following locations:

- Manage Transactions page
- Order History
- Custom Reports
- Emails

To enable automatic refunds for PayPal transactions, go to: **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > ILT PREFERENCES**.

### [Permissions](#)

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
ILT Preferences - Manage	Grants ability to configure a variety of default settings that apply to new instructor led training events and sessions. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

**Cornerstone**

☒ Allow Waitlists (If selected, this preference can be overridden at the organizational unit level.)

Default Event Settings:

☒ Auto-manage waitlist

☐ Auto-register users who are granted waitlist request

☐ Allow waitlist deadlines

Default Event Settings:

Students have  days and  hours to register for a class after a waitlist opening is granted.

Waitlist expires  days and  hours before session start date.

☐ Limit users to one waitlist per event

**ENROLLMENT**

☐ Allow enrollment substitutions with organizational unit. (If selected, this preference can be overridden at the organizational unit level.)

**PAYMENT PREFERENCE**

☒ Allow refund terms setup.

☒ Automate refund using refund terms setting. Users will be refunded base on original form of payment

☒ Allow no show fee charge.

**INTEREST TRACKING**

☐ Remove users from interest tracking after  months.

☐ Remove users from interest tracking list after  matching sessions are offered.

**ILT GEOLOCATION SEARCH**

Configure radius search options for ILT Geolocation Search:

Options	Default
1	<input checked="" type="radio"/>
5	<input type="radio"/>
10	<input type="radio"/>
15	<input type="radio"/>
25	<input type="radio"/>

The following existing refund options are available in the Payment Preference section of ILT Preferences - General:

- **Allow Refund terms setup** - Select this option to enable administrators to set up refund terms when setting up an ILT event.
  - **Automate refund using refund terms setting. Users will be refunded based on original form of payment.** - This option is only available if the "Allow Refund terms setup" option is selected. Select this option to automatically issue refunds.
- **Allow no show fee charge** - Select this option to enable administrators to set up no show fees when setting up an ILT event.

*See [ILT Preferences - General](#) for more information about ILT Preferences.*

*See [Refunds Overview](#) for more information about refunds.*

## PayPal - Manual Refunds

Administrators can manually initiate full and partial refunds for PayPal transactions via the Manage Transactions page.

To access the Manage Transactions page, go to **ADMIN > TOOLS > LEARNING > E-COMMERCE > MANAGE TRANSACTIONS**. Then, click on the order you want to refund.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Transaction Manager - Manage	Grants ability to access the Manage Transaction page and also create and edit transactions. On the Order History Details page, the administrator can edit the order status, adjust prices, issue refunds, or enter comments. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration
Transaction Manager - View	Grants ability to view the Manage Transaction page where the administrator can review the transactions that meet their permission constraints. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration

Order History Details Page: Cornerstone Administrator

**Order Information**  
Name : Cor  
User Name : ca  
Transaction Date : 7/11/2018  
Transaction ID : 531  
Identifier : Cor  
Payment Method : Cre  
Order Status : Cor  
What do you think of John?: XX0

**Details**  
Title  
Alcohol & Drug Testing: Driver Awareness Training  
Add comment to History:  
ORDER HISTORY  
Alcohol & Drug Testing: Driver Awareness Training  
\* Time Zone: (UTC-08:00) Pacific Time  
« Back

**Alcohol & Drug Testing: Driver Awareness Training**  
Payment Method: PayPal  
Unit Price: \$100.00 USD  
User Paid Percent: 100%  
Quantity Purchased: 1  
Subtotal: \$100.00 USD  
Item Total: \$100.00 USD  
User Paid: \$100.00 USD  
Previously Adjusted: \$-20.00 USD  
Amount:  USD (Max: \$80.00 USD)  
Note:  
  
   
Note: Training Units charges will be charged to users' Training unit account. Otherwise, all monetary charges will be posted to users' cost center while refund will be issued in the original form of payment. Maximum refund cannot exceed the original amount paid.

Options  
\$100.00  
\$100.00

## Manual Refund

---

To initiate a manual refund:

1. Click the Refund icon in the Options column next to the training you are refunding. A pop-up window appears.
2. In the pop-up, review the refund information and select a refund amount. Then add a note in the **Note** field explaining the refund.
3. Click the **SUBMIT** button to submit the refund.

If the refund is successful, the related refund information is reflected in the following locations:

- Manage Transactions page
- Order History
- Custom Reports
- Emails

*See [Refunds Overview](#) for more information about refunds.*

## Considerations

---

- If tax was applied to the transaction by PayPal, during the refund process the administrator should specify the pre-tax amount to refund to the customer. The maximum refundable amount to a customer is the sub-total amount. Once the refund is triggered, PayPal refunds the tax proportional to the amount refunded.
- If tax is not applied to the transaction, the amount refunded is not changed.

## Dynamic Tax Calculator - Cybersource

---

## Dynamic Tax Calculation - Define Payment Account

On the Define Payment Account page, administrators can configure the Cybersource Tax Calculator integration.

To access the Define Payment Account preferences page, go to **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > E-COMMERCE** and click the **Modify Payment Account** link. In the Payment Account section, click the Add icon to add a new payment account.

### Permissions

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

Define Payment Account

Define Payment Account

Name : PayPal Payment Account  
Description :

DEFINE CRITERIA

Training Type is Online Class

DEFINE PAYMENT GATEWAY

PayPal

PAYPAL INFORMATION

Please enter PayPal information. The Client ID and Client Secret are generated by creating an app using PayPal Developer Tools.  
Merchant Account ID : 123456  
Client ID :  
Client Secret :

CYBERSOURCE TAX CALCULATOR INTEGRATION

☒ When enabled, this PayPal payment account will be integrated to use Cybersource's tax calculator. A tax calculation account must be created with Cybersource in order to use this.  
Please enter Cybersource information. Transaction key is generated from the Cybersource Portal and is a required field. All other fields are optional. Tax Nexus and VAT number is only applicable if sales tax calculation functionality is turned on.  
Transaction Key : ☒ (Generated in the Cybersource portal)  
Merchant Descriptor :  
Merchant Descriptor Contact :  
Merchant Descriptor (Others) :  
Tax Nexus :  
VAT Number : Enter up to 10 comma separated VAT numbers. Do not include special characters other than the comma (",").

MERCHANT ACCOUNT INFORMATION

Once saved, the Merchant ID cannot be changed. Using a different Merchant ID requires creating a new payment account then deleting the unneeded payment account. Delete the unneeded payment account only if no existing transactions will require refunds.  
Bank Name :  
Merchant ID :

MODIFICATION HISTORY

Save Cancel

## Cybersource Tax Calculator Integration

---

In the Cybersource Tax Calculator Integration section, administrators enable the setting which allows the PayPal Payment Gateway integration to use an existing Cybersource account to dynamically calculate taxes for PayPal transactions.

To enable this setting, toggle the Cybersource Tax Calculator Integration toggle to the On position. If you do not wish to enable the Cybersource Tax Calculator, leave this switch toggled to the Off position. **Note:** *You must create a Cybersource account prior to enabling this option in order to allow the PayPal Payment Gateway integration to dynamically calculate taxes.*

If the Cybersource Tax Calculator Integration has been enabled, the administrator can configure the following fields which appear on the page:

- Transaction Key - The Transaction Key is generated from the Cybersource portal and is a required field.
- Merchant Descriptor
- Merchant Descriptor Contact
- Merchant Descriptor (Others)
- Tax Nexus
- VAT Number
- Merchant ID



## Dynamic Tax Calculator - Billing Address

---

In order to dynamically calculate taxes during the checkout process, a billing address must be collected from the user. If the Cybersource Tax Calculator integration has been enabled and the user has selected PayPal as the payment method, the user is prompted to populate the following billing address fields during the first step of the checkout process when purchasing training:

- Email
- First Name
- Last Name
- Address Line 1
- Address Line 2
- City
- Country
- State/Province
- Zip Code

This information allows Cybersource to dynamically calculate tax for the purchase.

- If enabled in User Payment Preferences, users can also opt to provide a secondary address if their billing address is separate from their shipping address. Providing a secondary address can be configured as required via User Payment Preferences, if needed. If preferences are set to collect a secondary address, the user will see the following options during checkout:
- **Use the billing address as my shipping address?**
  - **No** - If the user selects this option, the user's billing address will be the same as their shipping address.
  - **Yes** - If the user selects this option, the user will be prompted to complete the following fields for the secondary address:
    - Email
    - First Name
    - Last Name
    - Address Line 1
    - Address Line 2
    - City
    - Country
    - State/Province
    - Zip Code

For more information about the checkout process: [See Checkout - Step 1 - Payment.](#)

Shopping Cart

Checkout

Step 1 - Payment

Options

Checkout is a three step process. Each step is contained within a drop down table. Expand Billing, Payment and Review, enter all required information, and select to Place Order to complete the purchasing process.

Payment

Review

Confirmation

Payment Method

PayPal

PayPal

MasterCard

VISA

DISCOVER

AMERICAN EXPRESS

Proceeding will take you to PayPal to log in to your account or checkout as a guest (if enabled). You will have an opportunity to review your order after logging in to your PayPal account.

Billing Address

Your billing information should appear as it does on your credit card statement.

\* Required Field

Email \*

First Name \*

Last Name \*

Address Line 1 \*

Address Line 2

City \*

Country \*

State/Province

Zip Code \*

Back

Next

Purchase Summary

EU Competit...

\$500.00

Subtotal

\$500.00

Enter coupon c...

Apply

## Dynamic Tax Calculator with Cybersource - Overview

---

Administrators can enable the PayPal Payment Gateway (Early Adopter) integration to calculate taxes dynamically using the Cybersource Tax Calculator integration.

### Use Cases

---

#### Use Case 1: Existing Tax Calculation User

---

Flinn is the business process owner and administrator at ACME Corporation, which is a well-known provider of software engineering courses. They are using Extended Enterprise to sell the content. ACME is required to collect varying taxes on most of their sales. Their catalog has been configured to work with Cybersource as the payment gateway.

With the PayPal tax calculator, Flinn enables the PayPal Payment Gateway integration to accept payments, with confidence that ACME's complex tax rules will be respected.

#### Use Case 2: New Tax Calculation User

---

Khalil is the business process owner and administrator of Ventonix Enterprises, which is a well known provider of training content. Ventonix wants to sell content to the public, but must be compliant with various tax rules in order to do so. Because the PayPal Payment Gateway integration can be configured to dynamically calculate taxes, Khalil is able to create a new account with Cybersource, configure tax rules, and then enable the PayPal Payment Gateway integration to accept payments.

### Considerations

---

- Organizations using the PayPal Payment Gateway integration who wish to use the dynamic tax calculator are responsible for contracting with Cybersource to establish a Tax Calculation account. See:  
<https://www.cornerstoneondemand.com/marketplace/cybersource>
- If Tax Calculation with Cybersource is enabled, organizations using the PayPal Payment Gateway integration are responsible for disabling any PayPal tax rules that have already been configured.
- Your organization will need a PayPal business account in order to use the Cybersource Tax Calculator.
- Organizations will need to have Cybersource enabled in two different environments:
  - Cybersource Test is linked to CSOD Stage, Pilot
  - Cybersource Live is linked to CSOD Production
- Tax fields for PayPal transactions will flow to Standard Reports, Custom Reports, and Reporting 2.0.

### Implementation

---

In order to utilize this functionality, the PayPal Payment Gateway integration must be enabled, and your organization must create an account with Cybersource.

- For more information about configuring the PayPal Payment Gateway integration: [See \*\*PayPal Payment Gateway Integration\*\* on page 209 \*for additional information.\*](#)
- For more information about creating a Cybersource account:  
[\*\*https://www.cornerstoneondemand.com/marketplace/cybersource\*\*](https://www.cornerstoneondemand.com/marketplace/cybersource)

## Ultimate Software's UltiPro Core Data Inbound Integration Enhancements

---

With this enhancement, organizations that are using the Ultimate UltiPro Core Data Inbound Integration can now specify the Tenant URL, which enables the organization to specify the correct UltiPro environment for the data sync, such as Production or Pilot. In addition, the default language preference that is set in UltiPro is now passed to Cornerstone, which is used when a user is created in Cornerstone; if the user's language is later updated in Cornerstone, the default language does not overwrite the user's new language setting. If the UltiPro default language preference is not available or enabled in Cornerstone, then the Cornerstone portal default language is used for the user. Lastly, when Cornerstone sends a summary email to the UltiPro integration contact, the email now specifies the environment in the email subject and attaches an audit log of all successes and failures; previously, only failures were included in the audit log.

*This functionality will be available in the November 9 post-release patch.*

### Considerations

---

- Data is only sent from UltiPro to Cornerstone. User record data and Organizational Unit (OU) data is not sent from Cornerstone to UltiPro if users or OUs are updated or added in Cornerstone.
- OU and user data is synced from UltiPro to Cornerstone nightly. OU data is synced from UltiPro at 3:00 AM PST, and User data is synced at 4:00 AM PST.
- Ultimate's Employee APIs refresh every three hours. As a result, a force sync only syncs all users when the Ultimate API is refreshed with all changes.
- Only standard fields are sent from UltiPro to Cornerstone. Custom fields are currently not supported.
- Timezone data is not sent from UltiPro to Cornerstone for OUs or users. It must be configured as a system property.
- UltiPro implementations that have multiple companies, positions, and locations are not supported by this integration.
- Any existing users and OUs that were created prior to enabling this integration would be updated by UltiPro if they exist in UltiPro.

### Ultimate UltiPro Core Data Integration Enablement

---

To enable the Ultimate UltiPro Core Data integration:

1. Open UltiPro and navigate to the System Account Administration (MENU > SYSTEM CONFIGURATION > SERVICE ACCOUNT ADMINISTRATION).
2. Select the **ADD** button to add a new account.

## Service Account Administration

Customer API Key

Actions  OK

Find by  User name  starts with    Search

User Name	Status	Last Logon	User API Key

3. Populate the **User name**, **Password**, and **E-mail** fields. **Note:** These credentials will be used when configuring the integration within Cornerstone Edge.
4. Then, grant **View** access for the following Web Service permissions:
  - A. Company Configuration Integration
  - B. Employee Export

## Add/Change Service Account

User name  P1  C

Password  \*\*\*\*\*

E-mail  UL  :@ultima

**Password Requirements**

Password length: 4-15

Web Service	Add	View	Edit	Delete
Employee Person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Development Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development Opportunity Session	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development Opportunity Participation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PTO Plan Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Configuration Integration	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee Export	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payroll Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talent Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Select the **SAVE** button to save the service account.
6. Navigate to the Display Settings to identify the Organization Levels and their corresponding Description values. For example, in the below image, Organization Level 1 is configured to be Division, as indicated by the **Description** field for this Organization Level.

### Display Settings

edit labels
edit
print
help

Danish (DNK)
Dutch (NLD)
English (CAN)
English (GBR)
Filipino (PHL)
French (CAN)
French (FRA)
German (DEU)
Italian (ITA)
Malay (MYS)
Portuguese (BRA)
Spanish (USA)
Swedish (SWE)

Organization Level 1		Organization Level 2	
Code	Div	Code	Dept
Code length	6	Code length	6
Description	Division	Description	Department

Organization Level 3		Organization Level 4	
Code	Region	Code	Team
Code length	6	Code length	6
Description	Region	Description	Team Lead

#### Transfer of Employee Documents

☒ Copy documents to new company during employee transfer.  
☐ Do not copy documents to new company during employee transfer.

#### Window Title Settings

Hide Employee Number ☐ NO

7. Open the Edge Marketplace (**ADMIN > TOOLS > EDGE > MARKETPLACE**). Then, search for and purchase the Ultimate UltiPro Core Data Sync Integration.
8. Activate the integration via Edge Integrate (**ADMIN > TOOLS > EDGE > INTEGRATIONS**).
9. Configure the integration on the Edge Settings page by entering the following information:
  - A. Customer API Key - This is the UltiPro five-character Customer API Key that is found on the Service Account Administration page.
  - B. Tenant URL - UltiPro service endpoints are comprised of two parts: Tenant URL and resource path. The Tenant URL will be similar to <https://servicet.UltiPro.com>, but will vary by customer datacenter and production/test environments. This enables you to specify the correct UltiPro environment (Production, Pilot, Stage) for the data sync.
  - C. Username - Enter the User name value that was set when creating a service account in UltiPro in step 3.
  - D. Password - Enter the Password value that was set when creating a service account in UltiPro in step 3.
  - E. Contact Email - Enter the email address to which you want error notifications to be sent (multiple email addresses should be separated by a comma). A best practice is to set up an email distribution list of all administrators who would monitor integration errors.
  - F. User Identifier - Select whether UltiPro uses the User ID or User Number as the unique identifier for users.

- G. OU Mapping - Select which Organization Level in UltiPro corresponds with each OU type in Cornerstone. **Note:** *The Location and Position OUs in Cornerstone automatically map to UltiPro's Location and Job Organization Levels.*

Once the integration is enabled, all existing data is automatically scheduled to be synced from Ultimate UltiPro to the Cornerstone system. Following the initial sync, administrators can log in to their Ultimate UltiPro account and create or edit organization entities (e.g., Organization Level 1, Organization Level 2), and these entities will be created or updated as OUs in the Cornerstone system. Similarly, administrators can create or edit employees, and these employees will be created or updated as users in the Cornerstone system.

Once a sync is complete, a notification email is sent to the specified email address that is configured in the Contact Email field for the integration. The email contains a list of each OU and user that was added, updated, or failed to sync. For failures, a failure reason is included.

## Implementation

The Ultimate UltiPro Core Data integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This enhancement is automatically enabled for organizations that are using the Ultimate UltiPro Core Data Inbound Integration. This integration is available to all organizations. Organizations must also have an Ultimate UltiPro account.

## Security

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge



<p>Universal Profile - User Record - View Users</p>	<p>Grants ability to view user records in the system. Administrators can view the Modification History page for user records within their constraints. The administrator must have additional permissions to view specific fields on the user record. This permission can be constrained by OU, User's OU, User's Self, User Self and Subordinates, and User. This is an administrator permission.</p>	<p>Core Administration</p>
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## Ultimate Software's UltiPro Single Sign-On (SSO)

The Ultimate Software's UltiPro Single Sign-On (SSO) integration allows organizations to provide a seamless experience to their employees via Single Sign-On (SSO). Simply set up an outbound data feed from UltiPro to Kronos or the UltiPro Core Data Inbound Integration and enable this integration to allow your employees to log in to Cornerstone from UltiPro.

### Integration Settings

When configuring the UltiPro Single Sign-On integration, organizations must provide their UltiPro Client ID. This value can be obtained by contacting the Ultimate Software Account Manager.

### Implementation

The UltiPro Single Sign-On integration is available to try or to purchase via the Edge Marketplace. To access the Edge Marketplace, go to **ADMIN > TOOLS > EDGE > MARKETPLACE**.

This integration is available to all organizations. Organizations must have an existing UltiPro contract. Organizations that have an existing SSO integration from UltiPro to Cornerstone do not need to install this integration or migrate.

### Security

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Workday Core Data Inbound Integration

---

The new Workday Core Data Inbound integration is for organizations using Workday as the source for their HCM data. This integration enables organizations to manage organizational units (OUs) and users in Workday, and have those changes flow into the Cornerstone system automatically. The inbound integration runs nightly (US-Pacific) and can be triggered on demand.

Organizations using the existing standard Cornerstone-Workday Cloud Connect integration must migrate to this Edge-ready integration before Workday deprecates the existing integration in 2019. [See Retirement of Current Workday Integration in March 2019](#) on page 188 *for additional information*.

This integration includes the following functionality:

- One-way transfer of OUs and users from Workday to Cornerstone
- Ability to trigger the integration on-demand
- Map Workday Organization Types to Cornerstone Standard and Custom OUs
- Define the Workday Hierarchy to use for a Standard OU
- Deliver Summary Notification Emails to a subscribed list
- Differentiate between Contingent workers and Employees via Custom OU

*This functionality is not available during UAT. On October 26, this integration will be available for Production, Stage, and Pilot portals via the Edge Marketplace. This integration is free to install until January 1, 2019.*

## How Does this Enhancement Benefit My Organization?

---

This integration provides seamless management of employee and organizational unit (OU) data in Cornerstone through Workday.

## Implementation

---

It is recommended to implement the integration on your test environment prior to production environment.

For organizations that are using the previously existing, legacy Workday Core Data Inbound integration, enablement information will be available soon.

For new integrations, this integration is available for self-activation via Edge Marketplace and Integrations. Organizations must have an existing contract with Workday. Starter Guides and Migration instructions are included with the integration in Edge Marketplace.

Prior to January 1, 2019, this integration will be available in the Edge Marketplace for free to install. Cornerstone recommends existing clients who currently have a Workday integration to log into the Edge Marketplace in their Production, Stage, and Pilot environments and click "Install" prior to January 1. After clicking install, the integration can be set up after January 1 and prior to the Workday integration deprecation.

On and after January 1, 2019, the integrations will only be available to install in the Edge Marketplace for a fee.

## Security

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Workday Transcript Outbound Integration

---

The new Workday Transcript Outbound integration is for organizations that are using the Learning module and using Workday as the source for their HCM data. This integration is a one-way sync of completed transcripts from Cornerstone to Workday. The outbound integration runs nightly (US-Pacific) and can be triggered on demand.

Organizations using the existing standard Cornerstone-Workday Cloud Connect integration will need to migrate to this Edge-ready integration before Workday deprecates the existing integration in 2019. **See Retirement of Current Workday Integration in March 2019** on page 188 *for additional information*.

The following notes apply to this functionality:

- The following training types are supported: Online Course, Event, Session, Curriculum, Test, External Training, Material, Video.
- Only completed transcripts of active users are synced.
- Transcript sync may include Contingent Workers.
- Organizations can exclude users based on a user's OU and/or user custom field value is included.
- Organizations can exclude transcripts for certain training through a training custom field of type checkbox.
- Sync summary and log are emailed to a subscription list.

*This functionality is not available during UAT. On October 26, this integration will be available for Production, Stage, and Pilot portals via the Edge Marketplace.*

## How Does this Enhancement Benefit My Organization?

---

This integration provides an Edge-ready solution to synchronize completed transcript data from Cornerstone to Workday.

## Implementation

---

It is recommended to implement the integration on your test environment prior to production environment.

For organizations that are using the previously existing, legacy Workday Transcript Outbound integration, enablement information will be available soon.

For new integrations, this integration is available for self-activation via Edge Marketplace and Integrations. Organizations must have an existing contract with Workday. Starter Guides and Migration instructions are included with the integration in Edge Marketplace.

Prior to January 1, 2019, this integration will be available in the Edge Marketplace for free to install. Cornerstone recommends existing clients who currently have a Workday integration to log into the Edge Marketplace in their Production, Stage, and Pilot environments and click "Install" prior to January 1. After clicking install, the integration can be set up after January 1 and prior to the Workday integration deprecation.

On and after January 1, 2019, the integrations will only be available to install in the Edge Marketplace for a fee.

## Security

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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Engage

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## Campaign Random Sampling

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## Campaign Random Sampling - Overview

---

Prior to this enhancement, Engage administrators could not configure their campaign surveys to be received by a random subset of users within the selected campaign availability.

With this enhancement, Engage administrators can configure their campaign surveys so that they are sent a random subset of users within the selected campaign availability. This enables them to constantly monitor employee opinions at their organization through frequent recurring campaigns without overwhelming users with too many surveys.

### Use Case

---

Rachel is the head of HR at a corporation of 2,000 employees. The company is going through a lot of changes, so Rachel wants to create a weekly recurring Engage Campaign to monitor how the organization is feeling, so the company can immediately make adjustments as needed to ensure employees are satisfied, engaged, and committed. Keeping employees happy during a time of such heavy change is essential for organizational health.

To avoid overwhelming employees with constant surveys, Rachel enables the **Random Sampling** option when creating her campaign. She indicates that only 10% of the organization should receive the campaign each week, and no one should receive it more than once. Now, Rachel can keep a pulse on how employees are feeling on a weekly basis without overwhelming them with too many surveys.

### Considerations

---

No additional reporting capabilities are available with this functionality at this time.

### Implementation

---

This functionality is automatically available for all portals using Engage. Administrators can enable random sampling when creating Engage campaigns.

### Permissions

---

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage With the February, 2019 release, this permission name is changed to "Engage - Administration".	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission. This permission cannot be constrained.	Engage With the February, 2019 release, this category is changed to "Engage - Administration".

## Create Engage Campaign - Advanced Settings

With this enhancement, an Advanced Settings section is available at the bottom of the General step of the campaign creation process, allowing administrators to configure settings for random survey sampling.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage With the February, 2019 release, this permission name is changed to "Engage - Administration".	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission. This permission cannot be constrained.	Engage With the February, 2019 release, this category is changed to "Engage - Administration".

The screenshot displays the 'Manage Campaign' interface. On the left, a sidebar shows the 'CREATE CAMPAIGN' process with steps: General (selected), Survey, Invitation, and Launch. The main content area is titled 'Manage Campaign' and contains two sections: 'General Settings' and 'Advanced Settings'.

**General Settings:**

- Campaign Name:** Text input field with a 50 character(s) left indicator.
- Default Locale:** Dropdown menu set to 'English (US)'.
- Internal Description:** Text input field with a 500 character(s) left indicator.
- Privacy:** Toggle switch (ON).
- Use Corporate Header:** Toggle switch (ON).
- Campaign Type:** Dropdown menu set to 'Satisfaction'.
- Campaign Distribution:** Radio buttons for 'Email link' (selected), 'Mobile', and 'Action Item'.
- Availability:** 'Select Availability' button and a link icon. Below it, a blue button says 'Division: All Divisions'. To the right, it says '231 Users currently selected for campaign distribution'.
- Launch Date:** Date and time picker set to '09/28/2018 1:56:33 PM'.
- Campaign Frequency:** Radio buttons for 'Recurring' (selected), 'Daily', 'Weekly', 'Monthly', 'Quarterly', and 'Annually'.
- Close Date:** Date and time picker set to '10/05/2019 1:56:33 PM'.

**Advanced Settings:** (Highlighted with a red border)

- Random Sampling:** Toggle switch (ON).
- Indicate how many users, by percentage or numerical value, from the selected Availability should be randomly selected to participate in the campaign.**
- Percentage Based:** Radio button (selected) with a value of '25%'.
- Numerically Based:** Radio button (unselected) with an empty input field.
- Allow Multiple Occurrences:** Toggle switch (ON).

At the bottom right, there are 'Back' and 'Next' buttons.

## Advanced Settings

---

After configuring the General Settings for the campaign, scroll to the bottom of the General page to the Advanced Settings section. When enabled, Engage administrators can use the Advanced Settings to configure random sampling. To enable the Advanced Settings section for the campaign, toggle the **Advanced Settings** switch to the On (blue) position. The following options are available:

- **Random Sampling** - To enable random sampling for the campaign, toggle the **Random Sampling** switch to the On (blue) position. The **Random Sampling** switch is turned off by default. When enabled, additional configuration options for random sampling are available, and the campaign will be sent to a random sampling of users according to rules you set. The following options are available when Random Sampling is enabled:
  - **Percentage Based** - When Random Sampling is enabled, the **Percentage Based** option is selected by default. When enabled, the administrator can input a percentage, and then X% of users from the campaign's selected availability will receive the campaign. For example, if there are 100 possible recipients, and the administrator sets the percentage to 25%, only 25 recipients will receive the campaign survey. If this option is enabled, the percentage value can not be blank and cannot exceed 99%. **Note:** *For recurring campaigns, a NEW subset of the specified percentage of users will be selected, meaning the new occurrence will not take into account which users received the campaign in previous instances.*
  - **Numerically Based** - If the **Numerically Based** option is selected, the administrator can input a number, and then X number of users from the selected population will receive the campaign. For example, if there are 100 possible recipients, and the administrator sets the number to 30, only 30 out of 100 recipients will receive the campaign survey. If this option is enabled, the number value cannot be blank and cannot exceed the total number of users included in the campaign availability. **Note:** *For recurring campaigns, a NEW subset of the specified number of users will be selected, meaning the new occurrence will not take into account which users received the campaign in previous instances.*
  - **Allow Multiple Occurrences** - If the campaign is a recurring campaign, administrators can use the **Allow Multiple Occurrences** option to determine whether or not users can be randomly selected to receive a recurring survey more than once. When enabled, users within the campaign availability may be selected to receive the survey any time the campaign recurs. If the campaign is NOT a recurring campaign, the **Allow Multiple Occurrences** option is hidden.

See below for examples of this setting's behavior.

### Allow Multiple Occurrences Examples

#### Example 1: Allow Multiple Occurrences IS Enabled

---

The **Allow Multiple Occurrences** option is enabled for a recurring campaign which is configured to recur weekly for four weeks, and the campaign is also set to be distributed to 25% of the campaign's availability. Each week, 25% of the total population will be invited to

complete the campaign survey. Because the **Allow Multiple Occurrences** option is enabled, some employees may be invited to complete the survey all four times. Other employees may not be invited to participate in the campaign for any of the four weeks. Each recurrence of the campaign gives all users a 25% chance of being invited to complete the survey, regardless of whether or not the users were given the survey in previous occurrences.

## Example 2: Allow Multiple Occurrences is NOT Enabled

---

The **Allow Multiple Occurrences** option is NOT enabled for a recurring campaign which is configured to recur weekly for four weeks, and the campaign is also set to be distributed to 50% of the campaign's availability. Each week, 50% of the total population will be invited to complete the campaign survey. Because the **Allow Multiple Occurrences** option is not enabled, no users will receive the campaign more than one time throughout the duration of the campaign. Each time the campaign recurs, any users who have already received the campaign survey are omitted from the pool of users from which the 50% is selected. After all users within the campaign availability have received the survey, the survey will not be sent to any users if it continues to recur.

**Note:** *If the campaign runs out of users to give the survey to, the administrator is NOT notified.*

**Note:** *If new users are added to the campaign availability, they will receive the campaign when it recurs.*

Additional examples:

- If the campaign recurs each week for four weeks, 25% of available users are selected to receive the survey, and multiple occurrences are NOT enabled: 25% of the campaign's available users will receive the survey each week. Every user in the availability will receive the survey one time during the four weeks.
- If the campaign recurs each week for four weeks, 10% of available users are selected to receive the survey, and multiple occurrences are NOT enabled: 10% of the campaign's available users will receive the survey each week. By the end of the four week campaign, only 40% of the campaign's available users will have received the survey, and each user who received the survey received it only one time.

**Note:** *These examples assume no new users are added to the availability of the campaign while the campaign is running.*

## Enhancements to Engage View-Only Reporting Constraints

---

Prior to this enhancement, the Engage permission for viewing Engage reporting provided limited options for constraints. This made it difficult to grant the desired level of view-only reporting access to other user types, including:

- HRBPs
- Matrixed managers
- Individual contributors

With this enhancement, the Engage permission for viewing Engage reporting supports a full range of permission constraints, allowing administrators to grant managers, HRBPs, indirect managers, and other users the appropriate level of access to view confidential Engage results for their teams and organizations.

## Updated Constraints

---

The following constraints can now be applied to the permission to view Engage reporting:

- User Self And Subordinates
- User's Direct Subordinates
- User's Corporation
- User's Division
- User's Position
- User's Grade
- User's Cost Center
- User's Location
- User's Employee Type
- Division
- Position
- Grade
- Cost Center
- Location
- Employee Type
- Group

## Implementation

---

This functionality is automatically applied to all portals using Engage. Roles which include the permission for viewing Engage reporting and users who have the permission for viewing Engage reporting automatically receive the constraint of User Self and Subordinates. This permission can be managed by administrators via Security Role Administration. [See \*Security Role - Create - Constraints\*](#).

## Permissions

---

The following existing permission is updated by this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
<p>View Engage Reporting</p> <p>With the February 2019 release, this permission name changes to "Engage - View".</p>	<p>Grants access to the Campaign Dashboard. The constraints on this permission control what data is visible to the user on the Campaign Dashboard. This permission can be constrained by OU, User's OU, User Self And Subordinates, User's Direct Subordinates, User's Corporation, User's Employee Type, Employee Type. The data that is visible on the dashboard is controlled by the constraints set on the permission.</p>	<p>Engage</p> <p>With the February 2019 release, this category changes to "Engage - Administration".</p>

## Survey and Campaign Configurability

## Survey and Campaign Configurability - Overview

---

Prior to this enhancement, it was not possible to display a custom or translated Engage survey title to survey participants, and it was also not possible to configure a branded survey header for Engage surveys.

With this enhancement, Engage administrators can do the following using new Engage campaign configuration options:

- Configure a custom survey title for participants
- Translate the **Survey Title** and **Survey Name** fields into other languages
- Configure the header to feature your organization's corporate logo for Engage campaigns

## Considerations

---

- The existing **Survey Name** field is different from the new **Survey Title** field. The **Survey Name** is a required administrator-facing name for the survey, and is visible only in the Engage Library for internal organizational purposes. The **Survey Title** is an optional participant-facing title which can be translated into other languages.
- The survey header may only be configured to display a corporate logo or the Cornerstone logo at this time. No other custom images may be used in the survey header.
- The Survey Title field is NOT currently reportable via Custom Reporting

## Implementation

---

This functionality is automatically available for all portals using Engage.

## Permissions

---

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage With the February, 2019 release, this permission name is changed to "Engage - Administration".	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission. This permission cannot be constrained.	Engage With the February, 2019 release, this category is changed to "Engage - Administration".



## Create Campaign - Use Corporate Header

On the General step of the campaign creation process, administrators can enable a corporate header which will be displayed to participants completing the campaign.

To create a new campaign, go to **ANALYTICS > ENGAGE** and click the **ADMIN DASHBOARD** button. Then, click the **CREATE NEW CAMPAIGN** button.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage With the February, 2019 release, this permission name is changed to "Engage - Administration".	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission. This permission cannot be constrained.	Engage With the February, 2019 release, this category is changed to "Engage - Administration".

The screenshot shows the 'Manage Campaign' interface. On the left, there's a sidebar with 'CREATE CAMPAIGN' and tabs for 'General', 'Survey', 'Invitation', and 'Launch'. The 'General' tab is active. The main area is titled 'Manage Campaign' and contains a 'General Settings' section. The 'Use Corporate Header' toggle is highlighted with a red box and is turned on. Other settings include Campaign Name, Default Locale (English (US)), Internal Description, Privacy, Campaign Type (Satisfaction), Campaign Distribution (Email link, Mobile, Action Item), Availability (Select Availability), Launch Date, Campaign Frequency (Recurring), and Close Date. At the bottom right, there are 'Back' and 'Next' buttons.

## Use Corporate Header

The **Use Corporate Header** option allows administrators to determine whether the campaign will display a generic Cornerstone header or their own organization's corporate header, as set via Corporate Preferences.

To use your organization's corporate logo header as it is configured via your system's Corporate Preferences, toggle the **Use Corporate Header** switch to the On (blue) position. Any surveys distributed for this campaign will be sent to users with your organization's corporate logo displaying at the top of the page. This setting can be edited for Campaigns in draft, scheduled, or active statuses. **Note:** *You may wish to use this option to support branding and provide participants with a familiar experience.*

To use the generic Cornerstone header for your Engage campaigns, leave the **Use Corporate Header** switch toggled to the Off (grayed out) position. **Note:** *You may wish to use this option to emphasize privacy to your survey participants.*

## Survey Configurability - Survey Title

When creating an Engage survey, administrators can configure a new **Survey Title** field which displays to survey participants when they receive the survey through a campaign. With this enhancement, both the **Survey Title** and the **Survey Name** can also be localized into other languages.

To create a new survey, go to **ANALYTICS > ENGAGE** and click the **ENGAGE ADMIN CONSOLE** button. Next, click the **ENGAGE LIBRARY** button. Then, select the Surveys tab and click the **CREATE SURVEY** button.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Engage With the February, 2019 release, this permission name is changed to "Engage - Administration".	Grants access to both the reporting and campaign dashboards in Engage. This is an administrator permission. This permission cannot be constrained.	Engage With the February, 2019 release, this category is changed to "Engage - Administration".

The screenshot shows the 'Create Survey' interface. The 'General Settings' section contains the following fields:

- Survey Name** and **Survey Title**: Both are text input fields, with the 'Survey Title' field highlighted by a red rectangle.
- Internal Description**: A larger text input field.
- Default Locale**: A dropdown menu currently set to 'English (US)'.
- Participant Instructions**: A text input field with a help icon.
- Survey Type**: A dropdown menu currently set to 'Satisfaction'.
- Mobile Pulse**: A toggle switch that is currently turned off.
- Active**: A toggle switch that is currently turned on.

At the bottom of the form, there is an 'Add Pages' section with an 'Add Page' button. The 'Cancel' and 'Save' buttons are located at the bottom right of the form.

## General Settings

---

In the General Settings section of the Create Survey page, you can configure the Survey Name and the Survey Title.

- **Survey Name** - The name you provide for the **Survey Name** is administrator-facing and only displays in the Engage Library and when the administrator is selecting a survey for a campaign. This field is required and can be edited even if the survey is live. To translate this field into other languages, click the Globe icon next to the field and provide translation text for other languages as needed.
- **Survey Title** - The title you provide for the **Survey Title** displays to participants who receive the survey through a campaign. This field is optional and can be edited even if the survey is live. To translate this field into other languages, click the Globe icon next to the field and provide translation text for other languages as needed. If no **Survey Title** is provided, no title will display to survey participants.

## Engage Filter Organization

---

With this enhancement, the filters available when creating custom Engage reports, as well as the filters available when creating a campaign, are sorted into alphabetical order by default, making it easier for administrators to find desired filters. The following filters display in ascending alphabetical order:

- Division
- Location
- Position
- Manager

## Learning

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## Auto Upgrade to Content Publishing Redesign with Online Course Versioning in 2019

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In 2019, Cornerstone will retire the Course Publisher, and all portals will be automatically upgraded to the Content Uploader with Online Course Versioning, which was made generally available during the October '17 release. The exact date of the automatic upgrade is yet to be determined, but is being announced far in advance to provide administrators with sufficient time to plan for the change.

Activating the new Content Uploader and Online Course Versioning functionality remains optional until a future date in 2019. When Course Publisher is retired, it will no longer be accessible in the system.

For documentation about the Content Uploader and Online Course Versioning, see the following Online Help resources:

- [\*Learning Feature Activation Preferences.\*](#)
- [\*Create an Online Course - Overview.\*](#)
- [\*Content Uploader - Upload Files.\*](#)
- [\*Online Course Versioning vs. Modifying - Overview.\*](#)

## Certifications Usability Enhancements

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## Certifications Usability Enhancements - Overview

---

With this enhancement, the following updates have been made to Certification functionality:

- Certification processes have been optimized on the backend to improve system performance and reduce errors
- Any changes made to the validity period of a certification will trigger the creation of a new version
- The **Version** field has been updated to **Current Version** on the Certification Details page (applies to all certification statuses)
- The **Current Period** field displays the title of the certification period, along with the date the user completed the period requirements (applies to certifications in **Certified** status only)
- The **Next Period** field displays the title of the next certification period, along with the date the next period will begin (applies to certifications in **Certified** status only)
- The **Next Version** field displays the certification version number the user will receive during the next certification period (applies to certifications in **Certified** status only)
- The **Expiration Date** field has been updated to **Next Period Expiration Date**, which indicates when the user's next certification period will expire (applies to certifications in **Certified** status only)
- The **Due Date** field has been updated to **Next Period Due Date**, which displays the due date for the user's next certification period (applies to certifications in **Certified** status only)
- A footer has been added to the Certification Details page, to allow for customization

## Use Cases

### Use Case 1: Edits Trigger New Version of Certification

---

Kevin, an employee at ACME Power Company, is enrolled in version 1.0 of the Wind Turbine Maintenance certification. Lindsey, a learning administrator at ACME Power, decides to make changes to the certification. She changes the validity period for a training item within the certification, and when Lindsey saves her changes to the certification, version 2.0 of the Wind Turbine Maintenance certification is created. If Lindsey assigns this new version to Kevin, the updated validity requirements will apply to him.

### Use Case 2: Certification Details

---

Daniel, an employee at ACME Power Company, is enrolled in version 2.0 of the Power Safety Certification. Lindsey, a learning administrator at ACME Power, creates version 3.0 of the Power Safety Certification, which will apply to Daniel during his next certification period. When Daniel completes his certification requirements, the informational header on his Certification Details page displays information about the current and next version of the certification, such as when he completed the period and when the next period one will start.

## Implementation

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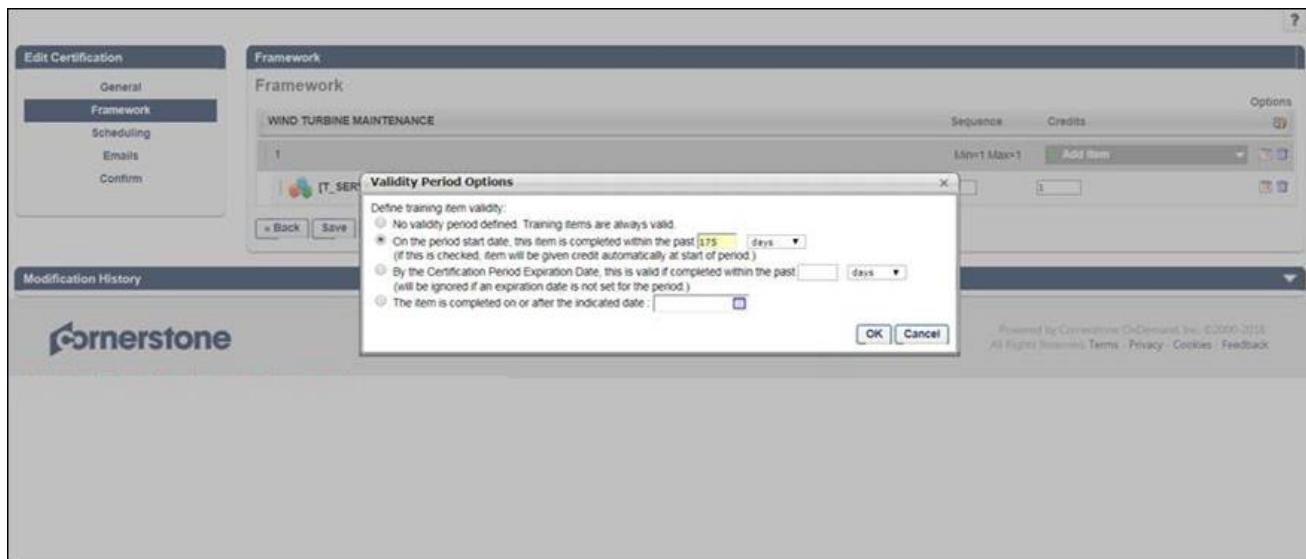
This functionality is automatically enabled for all portals using the Learning module.

## Changes to Certification Validity Period

With this enhancement, if an administrator makes any changes to the validity period of a certification, a new version of the certification is triggered. The administrator will be directed to the Versioning page to complete the creation of the new certification version.

### Permissions

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



## Edit Validity Period Options

Making any changes to a certification's Validity Period Options will trigger a new version of the certification. For more information about Validity Period Options, [See Certification - Create - Step 2 - Framework](#).

After editing a certification, if a new version of the certification is created, the administrator is taken to the Versioning page. See [Certification Versioning Selection Page](#) for additional information.

## Certification Details - In Progress

---

See the below images for clarification on which Certification Details fields have been updated for certifications in various statuses:

### Certification Details (All Statuses)

---

The following Certification Details fields are updated for certifications in ALL statuses:

- The **Version** field has been updated to **Current Version** on the Certification Details page

Cornerstone Compliance & GxP Certification	
Certification Details	
Title:	Cornerstone Compliance & GxP Certification
Description:	GxP is a general abbreviation for the "good practice" quality guidelines and regulations.
Family:	Safety
Category:	Safety Requirements
Current Status:	Certified (Renewal In Progress)
Current Period:	P2 - Renewal
Current Version:	1.0
Required Credits:	1.00
Earned Credits:	0.00
Due Date:	None
Expiration Date:	12/20/2019

### Certification Details (Certified Status Only)

---

The following Certification Details fields are updated **ONLY** for certifications in a Certified status:

- The **Current Period** field displays the title of the certification period, along with the date the user completed the period requirements
- The **Next Period** field displays the title of the next certification period, along with the date the next period will begin
- The **Next Version** field displays the certification version number the user will receive during the next certification period
- The **Expiration Date** field has been updated to **Next Period Expiration Date**, which indicates when the user's next certification period will expire
- The **Due Date** field has been updated to **Next Period Due Date**, which displays the due date for the user's next certification period


**Note:** These enhancements do NOT apply to certifications in a Certified (Renewal in Progress) status.

Cornerstone Compliance & GxP Certification	
Certification Details	
Title:	Cornerstone Compliance & GxP Certification
Description:	GxP is a general abbreviation for the "good practice" quality guidelines and regulations.
Family:	Safety
Category:	Safety Requirements
Current Status:	Certified
Current Period:	P1 - Initial Period (Completed on 7/5/2018)
Current Version:	1.0
Next Period:	P2 - Renewal (Starts on 3/2/2019)
Next Version:	2.0
Required Credits:	1.00
Earned Credits:	1.00
Next Period Due Date:	None
Next Period Expiration Date:	12/20/2019

## Certification Details Footer

With this enhancement, a footer has been added to the Certification Details page, to be consistent with other system pages.

[Move to Archived Transcript](#)



### Certification Details

**Title:**  
Pipette Certification

**Current Period:**  
Initial Period

**Family:**  
Healthcare

**Category:**  
Clinical

**Description:**  
Pipette Certification required of all employees who work with pipettes in the laboratory environment. Elements of the certification include:

- An initial classroom & lab session to learn the basics
- Annual requirements to take a test and be observed properly using a pipette
- Bi-Annual requirement to take additional courses on usage and maintenance of pipette

**Current Status:**  
In Progress/Past Due

**Due Date:**  
10/15/2016

**Version:**  
2.0





**Required Credits:**  
8.00

**Earned Credits:**  
4.00

**External Trainings:**  
[Add New External Training](#)   [Add External Training from Transcript](#)

**Expiration Date:**  
None

[Progress Report](#)

Title	Credits	Status	Options	CREDITED
Initial Requirement (Required Credits: Min = 4.00, Max = 4.00 / Acquired Credits: 4.00)				
 <b>Gilson Guide to Pipetting</b>	2.00	Completed	<a href="#">None</a>	Yes
 <b>Introduction to Pipette Usage</b>	2.00	Completed	<a href="#">Evaluate</a>	Yes
Pipette Assessment (Required Credits: Min = 4.00, Max = 4.00 / Acquired Credits: 2.00)				
 <b>Pipette Assessment</b>	2.00	Registered	<a href="#">Launch Test</a>	No
 <b>Pipette Checklist</b>	2.00	Completed	<a href="#">View Checklist</a>	Yes

**Approval History** ▼

**Modification History** ▼

[Back](#)

## Cornerstone Learn Curriculum Support

---

With a post-release patch, users of the Cornerstone Learn app will be able to launch curricula and view training items inside curricula from their transcripts via the Cornerstone Learn app. Users will also be able to launch and manage the training contained inside curricula on their transcripts.

Additional documentation about this feature will be made available in a post-release patch.

## Custom Banner Links in Cornerstone Learn

---

Prior to this enhancement, when using the Cornerstone Learn app, it was not possible to tap on the custom banner at the top of the Learner Home page to view the associated content attached by an administrator.

With this enhancement, when a user taps on a custom banner on the Learner Home page in the Cornerstone Learn app, the user is directed to the associated URL.

### Use Case

---

Sam is a learner who has recently downloaded the Cornerstone Learn mobile app so he can stay current on the training required for her role. She logs into the and views her Learner Home page. She notices a banner at the top of the page, which encourages her to check the company event calendar for details about an upcoming company event. She knows she will attend the event, but she wants to check the details of the event quickly, so she clicks on the banner and is navigated to the correct web page, where she checks the time and location of the event. She then taps the **BACK** button and returns to the Learner Home page to find new learning.

### Considerations

---

- The **Use Entire Image as Link** setting in Learner Home Preferences is ignored by the mobile app.
- The **Open Link in New Window** setting in Learner Home Preferences is ignored by the mobile app, as all links open in the app for ease of use.
- No button displays on custom banners in the Cornerstone Learn app.

### Implementation

---

This functionality is automatically enabled for the Cornerstone Learn app.

- When a user taps the banner, they are taken to the URL provided by the administrator who configured the banner link. A **BACK** button is available to allow the user to return to the app after viewing the link.
  - If the link is non-Cornerstone URL, it will open in a web browser page.
  - If the link is a deep link to a Cornerstone URL, the user will need to log into the Cornerstone system before being directed to the correct page.

## Custom Reports - Learning Fields

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## Custom Reports - Learning Fields

With this enhancement, updates and additions have been made to Custom Reporting to allow administrators to report on data related to Express Class. The following new and updated features are available in Custom Reporting:

- Express Class field added to the Transcript report field section
- On the Job Training report field section is renamed to Observed Training (On The Job Training & Express Class)
- New fields added to Observed Training (On The Job Training & Express Class) section
- Existing On the Job Training fields have been renamed

For more information about Express Class (Early Adopter): [See Express Class \(Early Adopter\) Gathered Learning Capture Tool - Overview](#) on page 274 *for additional information.*

## Considerations

Reporting for Express Class does not apply to Reporting 2.0.

## Implementation

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

## Permissions

The following existing permissions apply to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Assignment Report - Create	Grants ability to create and edit custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics
Custom Assignment Report - View	Grants ability to view custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics
Custom Compliance Report - Create	Grants ability to create and edit Custom Compliance Reports. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Limited Use/Obsolete
Custom Compliance Report - View	Grants ability to view results of custom compliance reports created by self or others. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Limited Use/Obsolete

Custom Curriculum Transcript Report - Create	Grants ability to view results of custom Curriculum Transcript reports created by self or shared by others. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Reports - Analytics
Custom Curriculum Transcript Report - View	Grants ability to create and edit custom Curriculum Transcript reports. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Reports - Analytics
Custom Multi-Module Report - Create	Grants ability to create and edit custom Multi-Module reports. This permission works in conjunction with other Custom Report - Create permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Multi-Module Report - View	Grants ability to view results of custom Multi-Module reports created by self. This permission works in conjunction with other Custom Report - View permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Transaction Reports - Create	Grants ability to create and edit Custom Transaction (Billing) reports.	Reports - Analytics
Custom Transaction Reports - View	Grants ability to view results of Custom Transaction (Billing) reports created by self or shared by others.	Reports - Analytics
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics

## Custom Reports - Express Class and On the Job Training

Updates and additions have been made to Custom Reporting to allow administrators to report on data related to Express Class. The following new and updated features are available in Custom Reporting:

- Express Class field added to the Transcript report field section
- On the Job Training report field section is renamed to Observed Training (On The Job Training & Express Class)
- New fields added to Observed Training (On The Job Training & Express Class) section
- Existing On the Job Training fields have been renamed

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Assignment Report - Create	Grants ability to create and edit custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics
Custom Assignment Report - View	Grants ability to view custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics
Custom Compliance Report - Create	Grants ability to create and edit Custom Compliance Reports. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Limited Use/Obsolete
Custom Compliance Report - View	Grants ability to view results of custom compliance reports created by self or others. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Limited Use/Obsolete
Custom Curriculum Transcript Report - Create	Grants ability to view results of custom Curriculum Transcript reports created by self or shared by others. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Reports - Analytics
Custom Curriculum	Grants ability to create and edit custom Curriculum	Reports -

Transcript Report - View	Transcript reports. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Analytics
Custom Multi-Module Report - Create	Grants ability to create and edit custom Multi-Module reports. This permission works in conjunction with other Custom Report - Create permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Multi-Module Report - View	Grants ability to view results of custom Multi-Module reports created by self. This permission works in conjunction with other Custom Report - View permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Transaction Reports - Create	Grants ability to create and edit Custom Transaction (Billing) reports.	Reports - Analytics
Custom Transaction Reports - View	Grants ability to view results of Custom Transaction (Billing) reports created by self or shared by others.	Reports - Analytics
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics

## Transcript Fields

The following new field has been added to the Transcript custom report field section, which is available for use in a variety of custom report types:

FIELD NAME	FIELD TYPE	FIELD DESCRIPTION
Is Express Class?	Yes/No	This column will contain a Y/N depending on whether or not the training was facilitated via Express Class.

The Transcript report field section is included in the following custom report types:

- Assignment Report
- Compliance Report
- Curriculum Transcript Report
- Multi-Module Report
- Transaction Report
- Transcript Report

### Observed Training (On The Job Training & Express Class)

The On the Job Training report field section has been renamed to Observed Training (On The Job Training & Express Class). The existing fields available in this section continue to be available, and the following new fields have also been added to this section:

<b>FIELD NAME</b>	<b>FIELD TYPE</b>	<b>FIELD DESCRIPTION</b>
Observed Training Result	Text	This column will contain a value of Completed, Failed, or Incomplete, depending on the result recorded via Express Class. The Completed result maps to a Complete transcript status, while Failed and Incomplete map to an Incomplete transcript status.
Observer - Facilitator ID	Text	This column will contain the User ID of the facilitator who recorded the Express Class, or the observer who recorded the On the Job Training.
Observer - Facilitator First Name	Text	This column will contain the first name of the facilitator who recorded the Express Class, or the observer who recorded the On the Job Training.
Observer - Facilitator Last Name	Text	This column will contain the last name of the facilitator who recorded the Express Class, or the observer who recorded the On the Job Training.
Observed Training Attempt Number	Numeric	This column will contain the attempt number for the On the Job Training attempt. For Express Class, the attempt number will always be 1.
Observed Training Comments	Text	This column will contain comments added by the facilitator or observer for the Express Class or On the Job Training.
Observed Training Score	Numeric	This column will contain the score recorded by the facilitator or observer for the Express Class or On the Job Training.
Observed Training Hours	Text	This column will contain the Training Hours for On the Job Training, and is not applicable to Express Class.

FIELD NAME	FIELD TYPE	FIELD DESCRIPTION
		Training Hours relative to Express Class can be identified using the <b>Training Hours</b> field within the Training section in reporting. The column will be formatted as (HHHH:MM), and is not available for filtering.

## Deep Linking - Access to Current Version - Curriculum

## Deep Linking - Access to Current Version - Curriculum

---

Prior to this enhancement, when a user received an email containing a deep link for an outdated version of a curriculum, clicking that deep link would redirect the user directly to their transcript with no indication that a new version of the curriculum exists.

With this enhancement, when a user receives an email containing a deep link for an outdated version of a curriculum when the current version of the curriculum is on the user's transcript, clicking that deep link redirects the user to the Training Details page of that training. Then, at the top of the page, the user sees a notification message stating that the training is out of date, and the user can click a link to access the latest version.

### How will this enhancement benefit my organization?

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- This enhancement reduces user confusion and makes it easy for learners to access and complete the latest version of their assigned curricula.
- This enhancement reduces administrative time by allowing users to access the latest version of assigned curricula without administrator intervention.

### Use Case

---

Bob, an employee at ACME Corp, receives an email reminding him to complete the Safety Compliance curriculum he was assigned earlier this month. Bob clicks the deep link for the curriculum contained in the email and is navigated to the Training Details page for the curriculum. At the top of the Training Details page, Bob sees a notification that his version of the curriculum is out of date. He clicks the link provided in the notification to access the latest version of the curriculum and is able to complete the curriculum's latest version for his organization.

### Considerations

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This enhancement is only applicable to curricula. No other training types are supported by this enhancement.

### Implementation

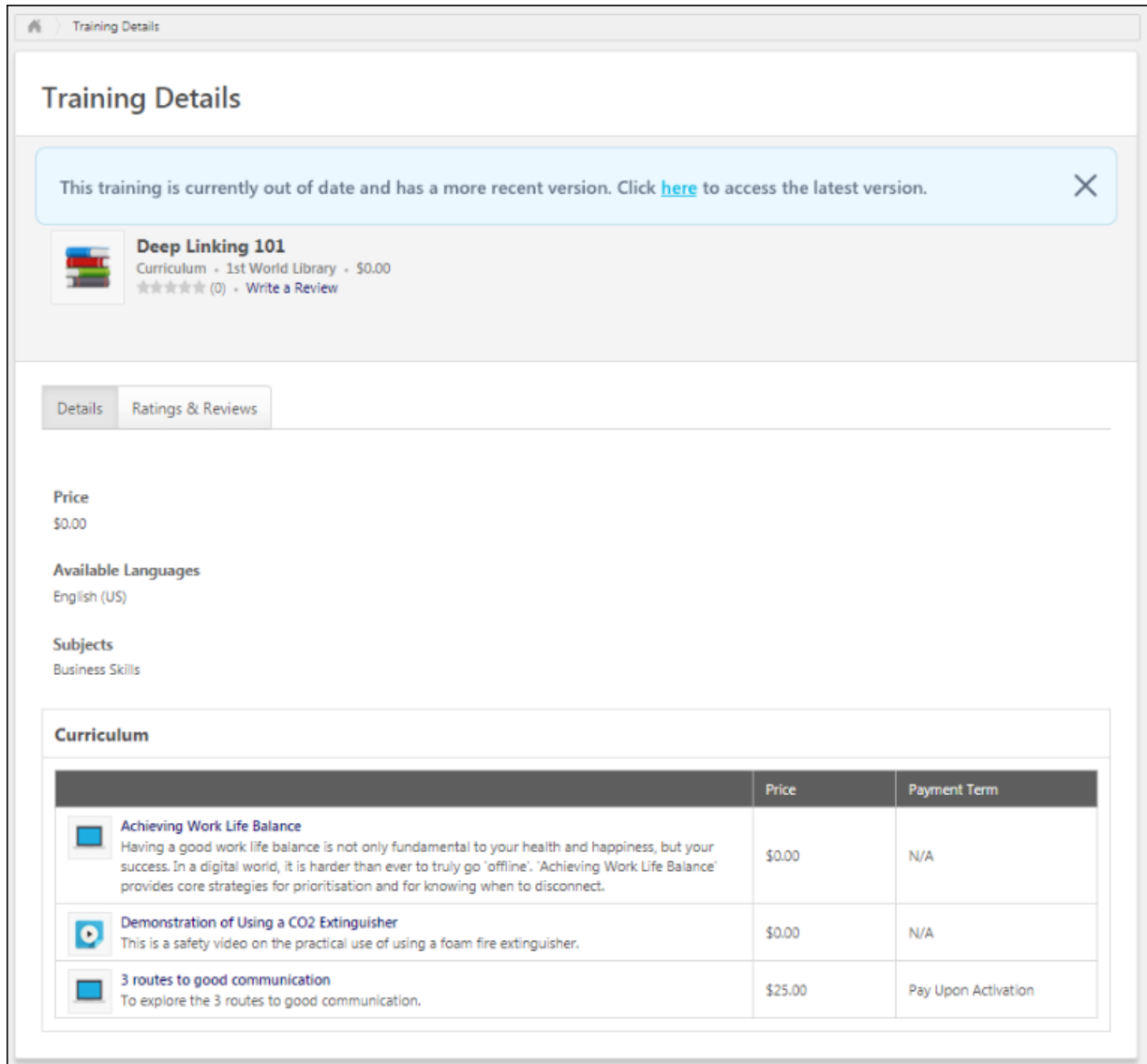
---

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






## Redirect to Current Curriculum Version

When a user receives a deep link for an outdated version of a curriculum and the current version of the curriculum is on the user's transcript, clicking that deep link redirects the user to the Training Details page of that training. Then, at the top of the page, the user sees a notification message stating that the training is out of date, and the user can click a link to access the latest version.



The screenshot shows the 'Training Details' page for 'Deep Linking 101'. At the top, a blue notification bar states: 'This training is currently out of date and has a more recent version. Click [here](#) to access the latest version.' Below this, the training title 'Deep Linking 101' is shown with a curriculum icon, '1st World Library' as the provider, a price of '\$0.00', and a rating of '0'. The page has two tabs: 'Details' (selected) and 'Ratings & Reviews'. Under 'Details', the price is '\$0.00', the available language is 'English (US)', and the subject is 'Business Skills'. A 'Curriculum' section contains a table with three items:

	Price	Payment Term
 <b>Achieving Work Life Balance</b> Having a good work life balance is not only fundamental to your health and happiness, but your success. In a digital world, it is harder than ever to truly go 'offline'. 'Achieving Work Life Balance' provides core strategies for prioritisation and for knowing when to disconnect.	\$0.00	N/A
 <b>Demonstration of Using a CO2 Extinguisher</b> This is a safety video on the practical use of using a foam fire extinguisher.	\$0.00	N/A
 <b>3 routes to good communication</b> To explore the 3 routes to good communication.	\$25.00	Pay Upon Activation

## Redirect to Current Version

When a user clicks on a deep link associated with an outdated version of a curriculum, they will be directed to the Training Details for the curriculum. A notification displays at the top of the Training Details page, stating, "This training is currently out of date and has a more recent version. Click here to access the latest version." If the user clicks the [here](#) link, the user is redirected to the Training Details page of the latest version of the curriculum.

**Note:** *This notification only displays if the current version of the curriculum is already on the user's transcript.*

**Note:** *This notification also displays to users if they access the Training Details page from their transcript, and a newer version of the curriculum exists on their transcript.*

## Express Class (Early Adopter)

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## Express Class (Early Adopter) Gathered Learning Capture Tool - Overview

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With this Early Adopter enhancement, the new Express Class Gathered Learning Capture Tool allows facilitators and administrators to quickly and easily document gathered learning after the learning takes place and give credit to the learners, from either a mobile or a desktop device. Express Class will undergo additional enhancement over the next several releases to support additional features and accommodate user feedback.

**[Click here to access the Starter Guide for Express Class.](#)**

### Use Cases

#### Use Case #1: Impromptu Training

---

Bill, a warehouse foreman, sees one of his warehouse unloaders, Zack, drop a stack of boxes onto the floor in the warehouse while operating a forklift. Bill sees an opportunity to give Zack additional training on forklift driving. After giving Zack training, Bill marks adds Zack to Forklift Training 101 on his tablet using Express Class and marks Zack as complete. Zack receives transcript credit for the training.

#### Use Case #2: Informal Training

---

Henry, an intern, is having trouble evaluating data in a data analysis software and decides to ask Michelle, his learning administrator, for help. Recognizing that this could be a good learning opportunity for another intern, Michelle asks another intern named David to join them. After an hour of instruction, Michelle decides that Henry and David have learned enough to warrant the completion of the Data Analysis 101 course offered in their company's portal, so she retroactively adds them as attendees to this instructor-led training (ILT) course via Express Class and gives them transcript credit for the training.

#### Use Case #3: Classroom Training

---

Andy, a training facilitator at ACME Corp, is responsible for training groups of employees on machinery used on the manufacturing floor. Each week, he gathers employees who require machinery training, delivers the training himself, and then adds the employees who attended his training as attendees to his Express Class, selects the appropriate training in the catalog, and gives them transcript credit for their time with him.

### Considerations

---

This is an Early Adopter enhancement, and additional Express Class functionality will be made available with future releases.

The following exclusions apply to this Early Adopter functionality:

- Express Class uses Amazon Web Services (AWS) technologies, but does not store data on AWS. Specifically, AWS is used as a proxy to communicate with our internal services.
- Reporting in Express Class does not apply to Reporting 2.0.

- Administrators will NOT have the ability to restrict the selectable training available to Express Class users beyond their current availability, as of the Oct '18 release.
- Express Class submissions bypass approval workflows, as of the Oct '18 release.
- Express Class submissions respect the default email settings for the chosen training, but Express Class submissions bypass the assigned, approved, and registered emails.
- On the Job Training (OJT) material training records submitted via Express Class do NOT appear on the On the Job Training - Observer page.
- If a training submitted via Express Class contains pre-work or post-work, the user will not be able to launch that training from their transcript without first manually completing the pre- or post-work. This behavior will be addressed in a post-release patch.
- When searching for training within the catalog, results will be limited to ten training items. If you do not see the desired training, continue to refine the search query.

## Implementation

This functionality is in an Early Adopter status, and is automatically available to all portals using the Learning module. The navigation link for Express Class is visible by default to users with the permission to manage Express Class.

System administrators automatically receive the permission to manage Express Class, and this permission can be distributed to users as desired. See the Early Adopter Checklist below for more information about whether Express Class (Early Adopter) is right for your organization.

## Early Adopter Checklist

Is being an Early Adopter right for your organization? If the following statements are true, your organization may benefit from using Express Class (Early Adopter):

- My organization often utilizes unstructured, gathered learning and needs an easy way to document and give credit for these learning opportunities.
- We do not need to respect approval workflows for training completed using Express Class; it is acceptable for Express Class to bypass approval workflows, excluding completion signatures.
- We understand that feedback may be requested from Early Adopters to help drive future product decisions regarding various aspects of Express Class, and we will make an effort to provide this feedback.
- I understand that not all Express Class features are currently available in the Early Adopter program, but I am eager to start using the features that are available now.

## Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Express Class -	Grants the ability to create and add users to an	Learning -

Manage	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.	Administration
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The following existing permissions apply to this functionality:

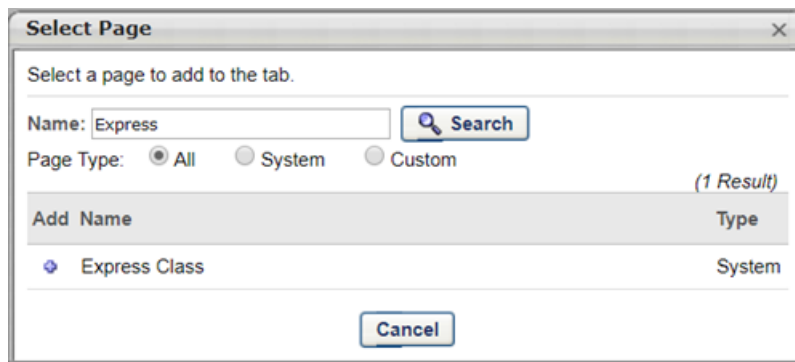
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
On the Job Training - Observation History From Transcript	Grants access for users to view On the Job Training Observation History from Transcript Details. This permission cannot be constrained. This is an end user permission.	Learning - Administration
View 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

## Add Express Class to Navigation Tabs

To manage Navigation Tabs and Links preferences, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > NAVIGATION TABS AND LINKS**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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



## Navigation Tabs and Links

To add the Express Class page to a navigation tab in Navigation Tabs and Links:

1. Click the Add Page icon in the Options column of the navigation tab row. This opens the Select Page pop-up.
2. To add the Express Class page as a link under the tab, click the plus icon to the left of the page name in the Add column. This adds the selected page to the bottom of the navigation tab to which the page was added. The page can then be reordered, if necessary, by dragging and dropping it into the appropriate position.
3. Once the Express Class link has been added to the page, you can click the Edit icon next to the link to edit the link's title.
4. Click the **SAVE** button at the bottom of the page to save and apply the changes you have made to the navigation tabs and links.

*See [Navigational Tabs and Links](#) for more information about configuring navigation tabs and links.*

## Create Express Class - General Information

The process for creating an Express Class is comprised of three steps:

1. General Information
2. Attendees - [See Create Express Class - Attendees](#) on page 282 *for additional information.*
3. Summary - [See Create Express Class - Summary](#) on page 287 *for additional information.*

On the General Information step, the user creating the Express Class provides basic information about the Express Class, such as the title, completion time, and time zone.

To create an Express Class, go to: **LEARNING > EXPRESS CLASS.**

### Permissions

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

The screenshot shows the 'Express Class' interface. On the left is a sidebar with three radio buttons: 'General Information' (selected), 'Attendees', and 'Summary'. The main area is titled 'General Information' and contains the following fields:

- Training Title \***: A search bar with the placeholder text 'Type the name of a training...'.
- Completion Time \***: A date field showing '10/2/2018' and a time field showing '1:00 PM'.
- Time Zone \***: A dropdown menu showing '(UTC-08:00) Pacific Time (US & Canada)'.
- Advanced Details**: A section header for additional options.

At the bottom of the form are two buttons: 'Cancel' and 'Next'.

### General Information

On the General Information page, populate the following fields and options:

- **Training Title** - Type the name of the training you are assigning with the Express Class. A list of the related system training search results that are available to the user displays under the **Training Title** field. Up to ten training items can appear in the predictive search results. Select the training item you wish to assign from the list. If necessary,



you can remove the training you selected by clicking the Delete icon to the right of the **Training Title** field. This field is required. The following training types can be assigned via Express Class:

- Material
- Test
- Video
- Event (Using Express Class, it is possible to complete an event without completing a session. The event displays as a standalone item on the user's Completed transcript.)
- Online Class
- Online Content
- **Completion Time** - In the **Completion Time** section, select the date of the training completion from the date field, and then select the completion time of the training from the time drop-down menu. This field is required.
- **Time Zone** - From the **Time Zone** field, select the time zone in which the training was completed. This field is required.

The following additional options become available when you click the **Advanced Details** link on the General Information page:

- **Training Hours** - If training hours are associated with the training you selected, the **Training Hours** field displays the number of training hours earned with the completion of the training.





After populating at least the required fields on the General Information page, click the **NEXT** button to advance to the Attendees step. [See \*\*Create Express Class - Attendees\*\* on page 282](#) *for additional information.*


## Mobile Browser

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Express Classes can be created in-browser on mobile devices. The process for creating the Express Class and the available fields are the same, but the display is optimized for mobile devices.

ACME




 > Create Express Class

Create Express Class





General Information Step 1 of 3

Training Title\*


 Type a new or existing class name...

Completion Time \*

06/21/18

9:00AM

Time Zone \*

Pacific Standard Time

Advanced Details

Next

Cancel

## Create Express Class - Attendees

The process for creating an Express Class is comprised of three steps:

1. General Information - See **Create Express Class - Attendees** on page *for additional information*.
2. Attendees
3. Summary - See **Create Express Class - Summary** on page 287 *for additional information*.

On the Attendees step, the user creating the Express Class searches for and selects the users who will be marked as having attended the Express Class.

To create an Express Class, go to: **LEARNING > EXPRESS CLASS**.

### Permissions

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

☒ General Information
 ☐ Attendees
 ☐ Summary

#### Attendees

Please add attendees and record their status:

Add Attendees



You currently don't have any attendees

Cancel

Back Next

### Add Attendees

To add attendees to the Express Class:

1. Click the **ADD ATTENDEES** button. This opens the Add Attendees flyout.

2. Search for users by name and check the box next to the name of any user who should be added to the Express Class.
3. Click the **Selected** tab to view the list of users you have selected for the Express Class.
4. If all the correct users have been selected for the Express Class, click the **SAVE** button at the bottom of the flyout.

The selected users will be added to the Attendees page, where you can record their completion results and scores for the Express Class.

## Record

---

After users have been added to the Express Class, you can record their completion results and scores individually or in bulk.

### Individual Record

---

To record a user's results and score individually on the Attendees page, click the **RECORD** button next to the specific user. A pop-up window appears, and you can populate the following fields for the user's Express Class record:

1. **Result** - A result selection is required. Select one of the following three training results for the user:
  - **Complete** - Select this result to indicate the user successfully completed the Express Class training. The Express Class will appear as Completed on the user's transcript.
  - **Incomplete** - Select this result to indicate the user did not complete the Express Class training. The Express Class will appear as Incomplete on the user's transcript.
  - **Fail** - Select this result to indicate that the user completed the Express Class training unsuccessfully. The Express Class will appear as Incomplete on the user's transcript.
2. **Score** - If a numeric score applies to the user's Express Class completion attempt, enter the score in the **Score** field. This field is not required.
3. **Comments** - Enter an explanation for the assigned result and score in the **Comments** field. This field is limited to 3000 characters and is not required.
4. Click the **Save** link at the bottom of the pop-up. The record will be saved for the user.

### Bulk Record

---

To record results and scores for multiple users at the same time, check the box next to all users you want to include in the bulk record, and then click the Bulk Record button. A pop-up window appears, and you can populate the following fields for the ALL the selected users:

1. **Result** - A result selection is required. Select one of the following three training results for the users:

- **Complete** - Select this result to indicate the users successfully completed the Express Class training. The Express Class will appear as Completed on the users' transcript.
  - **Incomplete** - Select this result to indicate the users did not complete the Express Class training. The Express Class will appear as Incomplete on the users' transcript.
  - **Fail** - Select this result to indicate that the users completed the Express Class training unsuccessfully. The Express Class will appear as Incomplete on the users' transcript.
2. **Score** - If a numeric score applies to the users' Express Class completion attempt, enter the score in the **Score** field. This field is not required.
  3. **Comments** - Enter an explanation for the assigned result and score in the **Comments** field. This field is limited to 3000 characters and is not required.
  4. Click the **Save** link at the bottom of the pop-up. The record will be saved for ALL selected users.

### Bulk Record (All)

Status\*

☐ Complete

☐ Incomplete

☐ Fail

Score

Comments

0 / 3000

Cancel

Save

## View Results and Scores for Users

After results and scores have been recorded for users on the Attendees page, you can view the selections made for each user. To search for a specific user in the Attendees list, you can enter the user's name in the **Search added attendees** search bar. The list of users will be filtered for users whose names correspond to your entered text.

If a score and result have been recorded for the user, the entered score and the selected result appear below the user's name and user ID. To make changes to these selections,

click the **EDIT** button to the right of the user's name. The Record pop-up window appears again, allowing you to edit the user's record information. If you wish to make edits in bulk, select the users whose records you want to modify and click the **BULK RECORD** button again. You will be able to create a new bulk record for all the selected users.

To continue to the Summary step of the Express Class creation process, click the **NEXT** button at the bottom of the page. See [Create Express Class - Summary](#) on page 287 for additional information.

## Attendees

Please add attendees and record their status:

Add Attendees

Search added attendees...

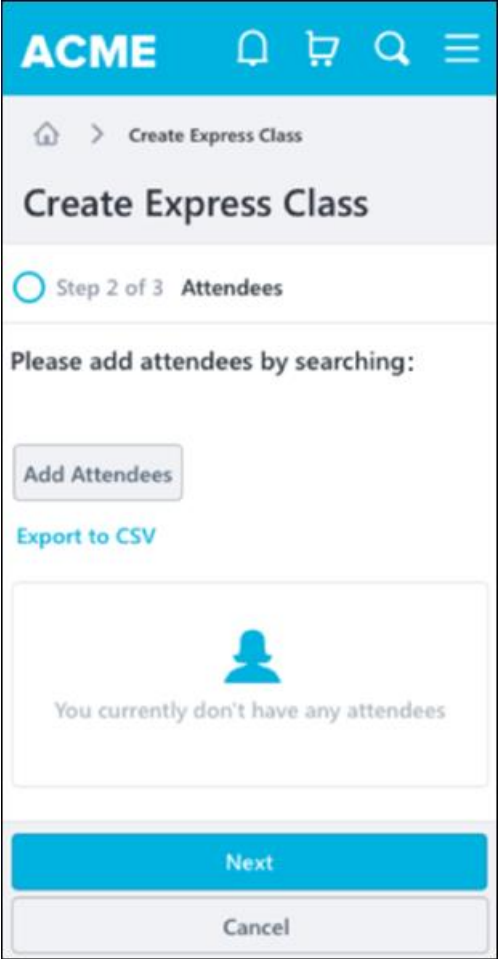
Select All Deselect All Bulk Record

Sort By Remove (All)

<input checked="" type="checkbox"/>	<div>Adam Kayne</div> <div>ID: akayne</div> <div>Score: 100</div> <div>Status: Complete</div>	Edit
<input checked="" type="checkbox"/>	<div>Aimee Pasia</div> <div>ID: apasia</div> <div>Score: 100</div> <div>Status: Complete</div>	Edit

## Mobile Browser

Express Classes can be created in-browser on mobile devices. The process for creating the Express Class and the available fields are the same, but the display is optimized for mobile devices.



## Create Express Class - Summary

The process for creating an Express Class is comprised of three steps:

1. General Information - See **Create Express Class - Summary** on page *for additional information*.
2. Attendees - See **Create Express Class - Attendees** on page 282 *for additional information*.
3. Summary

On the Summary step, the user can review their Express Class selections, go back and make changes if necessary, and submit the Express Class.

To create an Express Class, go to: **LEARNING > EXPRESS CLASS**.

### Permissions

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

**Express Class**

- General Information
- Attendees
- Summary**

### Summary

#### General Information

Training Title  
TestVideoExp1

Completion Time  
8/17/2018 4:35 PM (UTC-08:00) Pacific Time (US & Canada)

Facilitator  
Blah Yada

Location  
adelarosa location

#### Attendees

Total	1
Pass	0
Fail	1

Cancel Submit



## Summary

---

The Summary page displays your selections for the General Information and Attendees steps in the Express Class creation process.

The following fields and your corresponding selections appear in the General Information section:

- **Training Title**
- **Completion Time**
- **Training Hours**
- **Location**

To make changes to this information, click the **Edit** icon to the right of the General Information section. You will be returned to the General Information step, where you can make modifications and progress through the Express Class process again.

The following fields and your corresponding selections appear in the Attendees section:

- **Total** (number of users assigned to the Express Class)
- **Pass** (number of assigned users who are recorded as having passed the Express Class)
- **Incomplete** (number of assigned users who are recorded as having not completed the Express Class)
- **Fail** (number of assigned users who are recorded as having failed the Express Class)

To make changes to this information, click the **Edit** icon to the right of the Attendees section. You will be returned to the Attendees step, where you can make modifications and progress through the Express Class process again.





To finalize and submit the Express Class, click the **SUBMIT** button at the bottom of the Summary page.


## Mobile Browser

---

Express Classes can be created in-browser on mobile devices. The process for creating the Express Class and the available fields are the same, but the display is optimized for mobile devices.

ACME





> Create Express Class

Create Express Class

Step 3 of 3

Summary

General Information

Training Title

Factory Safety 101

Completion Time

06/21/201809:00am PST

Location

Santa Monica

Attendees

Total2

Complete:2

Incomplete:0

Failed:0

Submit

Cancel

## Express Class on Transcript

Training assigned via Express Class appears on users' learning transcripts. The options and information available for Express Classes on users' transcripts may differ from other training types on the transcript.

To access your transcript page, go to: **LEARNING > TRANSCRIPT**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
On the Job Training - Observation History From Transcript	Grants access for users to view On the Job Training Observation History from Transcript Details. This permission cannot be constrained. This is an end user permission.	Learning - Administration
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

## Transcript

The following actions are available on the transcript for Express Classes:

- **View Training Details** - Click this option to view the Training Details page for the Express Class. This action is always available for Express Classes, regardless of whether the Express Class result is Complete or Incomplete. On the Training Details page, the **View Observation History** link displays along with general information about the training. Click the **View Observation History** link to view observation information for the Express Class training. See the Observation History section below for more information about the information available on the Observation History page.
- **ReRequest** - Click the **ReRequest** option to receive a new instance of the training on your transcript in a Registered status. This option is ONLY available if ALL the following conditions are met:
  - The transcript status for the Express Class is Incomplete
  - Recurrence is enabled for the training contained in the Express Class
  - The user is included in the availability for the training item

## Observation History

The header of the Observation History page contains the following information:

- Profile Photo - The evaluated user's profile photo
- **Name** - The evaluated user's full name
- **Training Name** - The title of the attempted training
- **Completed** - The date the training was marked complete
- **Score** - The numeric score awarded for the user's training attempt (if provided)

Each individual Express Class completion attempt displays below the Observation History page header, from most recent to least recent. If provided by the observer at the time the attempt record was submitted, the following information displays for each attempt:

- **Result** - Displays whether the observer marked the user as Completed, Incomplete, or Failed for the training attempt
- **Date** - The date the user's training attempt was recorded
- **Score** - Displays the numeric score the user achieved on the training, if applicable
- **Comment** - Any comments regarding the training completion attempt, if provided by the observer/facilitator

## Considerations

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- Any On the Job Training records submitted via Express Class will NOT appear on the On the Job Training - Observer page.
- Prior to this release, the Observation History page was only available for On the Job Training materials. With this release, it is available for training items assigned via Express Class, and the term Observer is updated to Observer/Facilitator on the Observation History page.
- If a user has completed an event via Express Class, the event displays as a standalone item on the user's Completed transcript.

## Express Class (Early Adopter) - Reporting

With this enhancement, updates and additions have been made to Custom Reporting to allow administrators to report on data related to Express Class. The following new and updated features are available in Custom Reporting:

- Express Class field added to the Transcript report field section
- On the Job Training report field section is renamed to Observed Training (On The Job Training & Express Class)
- New fields added to Observed Training (On The Job Training & Express Class) section
- Existing On the Job Training fields have been renamed

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Assignment Report - Create	Grants ability to create and edit custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics
Custom Assignment Report - View	Grants ability to view custom Assignment reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and Provider.	Reports - Analytics
Custom Compliance Report - Create	Grants ability to create and edit Custom Compliance Reports. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Limited Use/Obsolete
Custom Compliance Report - View	Grants ability to view results of custom compliance reports created by self or others. This permission should only be enabled if a client has not yet converted compliance certifications to the new certifications module.	Limited Use/Obsolete
Custom Curriculum Transcript Report - Create	Grants ability to view results of custom Curriculum Transcript reports created by self or shared by others. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Reports - Analytics
Custom Curriculum	Grants ability to create and edit custom Curriculum	Reports -

Transcript Report - View	Transcript reports. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Analytics
Custom Multi-Module Report - Create	Grants ability to create and edit custom Multi-Module reports. This permission works in conjunction with other Custom Report - Create permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Multi-Module Report - View	Grants ability to view results of custom Multi-Module reports created by self. This permission works in conjunction with other Custom Report - View permissions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User's Direct Subordinates, and User.	Reports - Analytics
Custom Transaction Reports - Create	Grants ability to create and edit Custom Transaction (Billing) reports.	Reports - Analytics
Custom Transaction Reports - View	Grants ability to view results of Custom Transaction (Billing) reports created by self or shared by others.	Reports - Analytics
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics

## Transcript Fields

The following new field has been added to the Transcript custom report field section, which is available for use in a variety of custom report types:

FIELD NAME	FIELD TYPE	FIELD DESCRIPTION
Is Express Class?	Yes/No	This column will contain a Y/N depending on whether or not the training was facilitated via Express Class.

The Transcript report field section is included in the following custom report types:

- Assignment Report
- Compliance Report
- Curriculum Transcript Report
- Multi-Module Report
- Transaction Report
- Transcript Report

### Observed Training (On The Job Training & Express Class)

The On the Job Training report field section has been renamed to Observed Training (On The Job Training & Express Class). The existing fields available in this section continue to be available, and the following new fields have also been added to this section:

<b>FIELD NAME</b>	<b>FIELD TYPE</b>	<b>FIELD DESCRIPTION</b>
Observed Training Result	Text	This column will contain a value of Completed, Failed, or Incomplete, depending on the result recorded via Express Class. The Completed result maps to a Complete transcript status, while Failed and Incomplete map to an Incomplete transcript status.
Observer - Facilitator ID	Text	This column will contain the User ID of the facilitator who recorded the Express Class, or the observer who recorded the On the Job Training.
Observer - Facilitator First Name	Text	This column will contain the first name of the facilitator who recorded the Express Class, or the observer who recorded the On the Job Training.
Observer - Facilitator Last Name	Text	This column will contain the last name of the facilitator who recorded the Express Class, or the observer who recorded the On the Job Training.
Observed Training Attempt Number	Numeric	This column will contain the attempt number for the On the Job Training attempt. For Express Class, the attempt number will always be 1.
Observed Training Comments	Text	This column will contain comments added by the facilitator or observer for the Express Class or On the Job Training.
Observed Training Score	Numeric	This column will contain the score recorded by the facilitator or observer for the Express Class or On the Job Training.
Observed Training Hours	Text	This column will contain the Training Hours for On the Job Training, and is not applicable to Express Class.

FIELD NAME	FIELD TYPE	FIELD DESCRIPTION
		Training Hours relative to Express Class can be identified using the <b>Training Hours</b> field within the Training section in reporting. The column will be formatted as (HHHH:MM), and is not available for filtering.



## Learning Compliance Enhancements

## Learning Compliance Enhancements - Overview

---

With the October 2018 release, the following Learning Compliance enhancements are available:

- Online courses, materials, and videos in a Completed Equivalent status can be launched, so users can always access the latest documents
- The following additional custom field types can be audited
  - Conditional Numeric
  - Branched Drop-down
  - Hierarchy
- When reversoning a material using Versioning with Append, the **Start Date** time of the new version matches the **End Date** time of the previous version
- When a training item that was previously assigned to a user via a learning assignment is reassigned via the same assignment or via a separate learning assignment, the user receives the latest version of the training item, instead of the old version.
- A new option is available which allows the learning assignment to override all prior due dates for training contained in the assignment.

The following feature was released in the Sept 7 2018 patch:

- Curricula versioning can be applied to dynamic and dynamic recurring learning assignments, and a new filter and column have been added to the Dynamic Assignment Details table to identify the assignment type.

The following features will be added in post-release patches:

The following transcript statuses will be added to the Training Removal Tool in the December 14, 2018 patch:

- Cancelled
- Incomplete
- No Show
- Not Started
- Pending OJT Completion

With the November 30, 2018 patch (Stage) and the January 4, 2019 patch (Production), the following compliance enhancements will be made to the Learning Assignment Tool:

- The **Enable Assign New Occurrence** setting will be updated to push the assignment training EVERY time users enter the assignment criteria for a dynamic learning assignment.
- A new **Maintain Transcript Progress** option will allow users to maintain their training progress when they are assigned a new occurrence of the same version of a training on their transcript.

- Curriculum reassignment will provide users with the latest version of all child training contained within the curriculum.

The following enhancement will be made available in a future patch, the date of which is yet to be determined:

- Inactive curricula are excluded from material and online course versioning (Release date is TBD)

## Implementation

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

**[Click here to access the Starter Guide for the Learning Assignment Tool.](#)**

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	<p>Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.</p> <p>With the Dec 14 2018 and Jan 4 2019 patches, administrators with this permission will be able to remove the following training types in the following additional transcript statuses:</p> <p>For sessions:</p> <ul style="list-style-type: none"> <li>○ Cancelled</li> <li>○ Incomplete</li> <li>○ No Show</li> </ul> <p>For On the Job Training:</p> <ul style="list-style-type: none"> <li>○ Pending OJT Completion (applicable to On the Job Training)</li> </ul> <p>For events:</p> <ul style="list-style-type: none"> <li>○ Not Started (only for events )</li> </ul> <p>For training delivered by Express Class in a status of Incomplete:</p>	Learning - Administration

	<ul style="list-style-type: none"> <li>○ Incomplete</li> </ul>	
Curricula Version - Manage	<p>The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reverting the curriculum. This permission works in conjunction with the Curricula Admin - Manage permission. The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reverting a material that is contained within a curriculum. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.</p>	Learning - Administration
Online Class Version - Publish	<p>Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission.</p> <p>As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.</p>	Learning - Administration
Material Version with Append - Manage	<p>Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.</p> <p>This permission only applies to organizations that are using Versioning with Append for materials.</p>	Learning - Administration
Material Version - Replace Only - Manage	<p>Grants ability to assign a new version of a material to a user. The constraints on this permission determine to which users the administrator can assign a new version of a material. This permission works in conjunction with the Materials Management permission. Without this permission, administrators cannot upload new material source files. This permission can be constrained by OU, User's OU, and Users. This is an administrator</p>	Learning - Administration

	<p>permission.</p> <p>This permission only applies to organizations that are using Simplified Versioning for materials.</p>	
View Transcript Item	<p>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.</p>	Learning - Administration

## Compliance Enhancements - Launch Completed Equivalent Training

Prior to this enhancement, it was not possible for users with online courses, videos, or materials in a Completed Equivalent status to launch these items from their transcripts or any other location where training can be accessed.

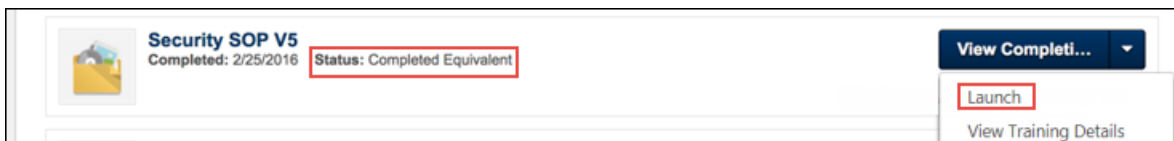
With this enhancement, even when an online course, video or material training item is in a Completed Equivalent status on the user's transcript, the user can launch the training from their transcript and the following other locations:

- Curriculum Player page
- Curriculum Details page
- Certification Details page
- Training Details page
- Transcript Details page
- Cohort Details page
- Cohort Player page
- Learner Home

To access your own transcript page, to go: **LEARNING > VIEW YOUR TRANSCRIPT.**

### Permissions

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



## Launch Material, Video, or Online Course

To open a material, video or online course in a Completed Equivalent status from the transcript, located the training item and click the Options drop-down menu to the right of the training item. Click the **Launch** link to launch the material or online course.

**Note:** *This functionality works retroactively, meaning that any training on a user's transcript in a Completed Equivalent status, whether added to the transcript prior to or after the October 2018 release, can be launched by the user.*

## Enhanced Custom Field Auditing - Additional Fields

---

Prior to this enhancement, only the following custom field types could be audited:

- Short Text Box
- Date
- Radio Button
- Dropdown
- Checkbox
- Multiple Checkbox
- Numeric
- Scrolling text

With this enhancement, ALL the following custom field types can be audited:

- Short Text Box
- Date
- Radio Button
- Dropdown
- Checkbox
- Multiple Checkbox
- Numeric
- Scrolling text
- Conditional Numeric (new)
- Branched Dropdown (new)
- Hierarchy (new)

With these additional auditing capabilities, organizations can more effectively ensure compliance.

### Implementation

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This functionality is NOT automatically enabled. In order to utilize these enhanced auditing capabilities, a GTS project to allow auditing via an outbound data feed must be initiated. Please contact Global Product Support (GPS) or your Account Manager to initiate a GTS project. A cost may be associated with this process.



## Compliance Enhancements - Training Removal Tool

This enhancement will be released with the Dec 14 2018 patch.

Prior to this enhancement, administrators were unable to remove instructor-led training (ILT) sessions which were in the following statuses:

- Incomplete
- Cancelled
- No Show
- Not Started
- Pending OJT Completion

Following this enhancement, administrators can use the Training Removal Tool to remove sessions the following transcript statuses:

- Incomplete
- Cancelled
- No Show
- Not Started
- Pending OJT Completion

To create a new training removal job, go to **ADMIN > TOOLS > LEARNING > TRAINING TOOLS > TRAINING REMOVAL TOOL**. Then, click the **Create New Training Removal Job** link. Advance to the Status step to select the transcript statuses the Training Removal Tool can remove from users' transcripts.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	<p>Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.</p> <p>With the Dec 14 2018 and Jan 4 2019 patches, administrators with this permission will be able to remove the following training types in the following additional transcript statuses:</p> <p>For sessions:</p> <ul style="list-style-type: none"> <li>○ Cancelled</li> <li>○ Incomplete</li> <li>○ No Show</li> </ul> <p>For On the Job Training:</p>	Learning - Administration

	<ul style="list-style-type: none"> <li>○ Pending OJT Completion (applicable to On the Job Training)</li> </ul> <p>For events:</p> <ul style="list-style-type: none"> <li>○ Not Started (only for events )</li> </ul> <p>For training delivered by Express Class in a status of Incomplete:</p> <ul style="list-style-type: none"> <li>○ Incomplete</li> </ul>	
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## Status

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Using the Training Removal Tool, training in the following transcript statuses can be removed from users' transcripts:

- Approved
- Cancelled (new)
- Denied
- Incomplete (new)
- In Progress
- No Show (new)
- Pending Approval
- Pending OJT Completion (new)
- Pending Payment
- Registered
- Withdrawn


*See [Training Removal Job - Create - Step 3 - Status](#) for more information about the Status step of creating a training removal job.*

## Compliance Enhancements - Exclude Curricula from Versioning

Prior to this enhancement, when an administrator reversioned a material that was contained within a curriculum, they were shown a list of all curricula which contained the material being versioned in the Impacted Curricula section of the reversioning process. When an administrator reversioned an online course that was contained within a curriculum, they were shown the number of curricula which contained the online course being versioned. Inactive curricula were included in the list of curricula for materials, as well as in the number of impacted curricula for online courses, and the administrator could apply the new version of the material or online course to these inactive curricula.

With this enhancement, when an administrator reversioned a material or an online course contained within a curriculum, any inactive curricula are excluded from the Impacted Curricula section in the reversioning process. This update helps maintain the historical integrity of inactive curricula, and organizations can report accurately on the structures of inactive curricula. **Note:** *This enhancement also applies to DMS material versioning.*

**This enhancement is not available with the Oct '18 release. It will be made available in a future patch.**

- To reversion a material, go to **ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > MATERIALS**. A new material version is created by clicking the Create Version  icon. Advance to the Reversion Options step to view the Impacted Curricula section.
- To create a new online course, go to **CONTENT > COURSE PUBLISHER** or **ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE PUBLISHER**. Then, click the **Create New Publication** link.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Version - Manage	The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning the curriculum. This permission works in conjunction with the Curricula Admin - Manage permission. The constraints on this permission determine for which users the administrator can assign a new version of a curriculum when reversioning a material that is contained within a curriculum. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Learning - Administration
Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in	Learning - Administration

	<p>conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU, Users, and Providers. This is an administrator permission.</p> <p>As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.</p>	
Material Version with Append - Manage	<p>Grants ability to create versions of a material. This permission works in conjunction with the Materials Management permission. This permission can be constrained by OU, User's OU, and Users.</p> <p>This permission only applies to organizations that are using Versioning with Append for materials.</p>	Learning - Administration
Material Version - Replace Only - Manage	<p>Grants ability to assign a new version of a material to a user. The constraints on this permission determine to which users the administrator can assign a new version of a material. This permission works in conjunction with the Materials Management permission. Without this permission, administrators cannot upload new material source files. This permission can be constrained by OU, User's OU, and Users. This is an administrator permission.</p> <p>This permission only applies to organizations that are using Simplified Versioning for materials.</p>	Learning - Administration

Cornerstone Catalog / Material Administration

## Create Version

General Availability Emails **Reversion Options** Confirm

### Version Preferences

Use the options below to determine how the new version of this Material will be assigned to users. Users who already have this Material on their Transcripts (whether it is stand-alone or in a Curricula) can be updated based on their training status, how it was assigned or by specifying availability criteria. Users transcripts can also be updated with the latest version but not require re-training by making the new version equivalent to the previous version.

1 **Version** All Versions ▼

2 **Status**

- ☒ Not Started
- ☒ In Progress
- ☐ Completed

**Assign To**

- ☒ Users with Previous Version(s) on Transcript
- ☐ Users Assigned by Dynamic Assignment
- ☐ Define by OU

3 **Version Equivalency**

- ☒ Requires Retraining
- ☐ Versions Equivalent

4 **Impacted Curricula** [2](#)

5 **Update User List**

Results

## Impacted Curricula

During the reversioning process for both materials and online courses, the number of **Impacted Curricula** displayed does NOT include inactive curricula. It is not possible to apply the updated version of a material or online course to an inactive curriculum. If the administrator clicks the linked number in the **Impacted Curricula** field during the material reversioning process, no inactive curricula will display in the list for materials.

## Sync Start of New Version and End Date of Previous Version during Material Versioning (With Append)

---

With this enhancement, when an administrator creates a new version of a material using Versioning with Append, the **Start Date** time of the new version matches the **End Date** time of the previous version, so that both versions cannot coexist at the same time. This helps organizations ensure compliance when reversioning materials.

*See [Material Reversioning Behaviors \(Versioning with Append\)](#) for more information about material versioning behavior.*

## Learning Compliance - Learning Assignment Tool

---

With the October release, the following compliance enhancements are made to the Learning Assignment Tool:

- When a training item that was previously assigned to a user via a learning assignment is reassigned via the same assignment or via a separate learning assignment, the user receives the latest version of the training item, instead of the old version.
- A new option is available which allows the learning assignment to override all prior due dates for training contained in the assignment.

With the November 30, 2018 patch (Stage) and the January 4, 2019 patch (Production), the following compliance enhancements will be made to the Learning Assignment Tool:

- The **Enable Assign New Occurrence** setting will be updated to push the assignment training EVERY time users enter the assignment criteria for a dynamic learning assignment.
- A new **Maintain Transcript Progress** option will allow users to maintain their training progress when they are included in the availability for an assignment of the same version of a training item on their transcript.
- Curriculum reassignment will provide users with the latest version of all child training contained within the curriculum.

Documentation for functionality released in a post-release patch will be made available in Patch release notes.

## Dynamically Reassign Latest Version of Training Across All Learning Assignments

---

Prior to this enhancement, when a training item that was assigned to a user via a learning assignment was dynamically removed and then reassigned via another assignment, the system would restore the originally assigned version of training, even if a newer version of the training existed. Additionally, the user was not processed by the new learning assignment.

With this enhancement, when a training item that was assigned to a user via a learning assignment is dynamically removed and then reassigned via another assignment, the latest version of the training is added to the user's transcript and the user is processed by the new learning assignment. This functionality applies to dynamic and dynamic recurring assignments and ensures that any users from any previous assignments are reassigned the latest version of training items and child training items.

## Use Case

---

Clara is an employee at ACME Shipping, in the Northwest Division. Andrew, a learning administrator, assigns Clara the course, "Lifting with Care," Version 1 via a dynamic learning assignment which is configured to assign training to the Northwest Division. Dynamic Removal is enabled for the assignment. Later, Clara leaves the Northwest Division, and "Lifting with Care" is removed from her transcript.

Andrew later deactivates the dynamic learning assignment due a change in requirements, and then he creates a new dynamic learning assignment using the same availability. Andrew also creates a new version of “Lifting with Care” so the training is updated for the new year.

After a few months, Clara returns to the Northwest Division and enters the availability of the new learning assignment. She is reassigned “Lifting with Care” and receives the newest version of the training.

## Override All Prior Due Dates

---

If the **Enable Assign New Occurrence** setting is turned on, an additional option is available which allows the learning assignment to override all prior due dates for training contained in the assignment. This means that if a user already has the assignment training on their transcript and then they receive a new occurrence of the training, the due date of the new assignment will override the due date(s) of the previous instance of the training on the user's transcript. To allow the assignment to override previous due dates, toggle the Override All Prior Due Dates switch to the On (green) position.



If applicable, override all prior due dates for trainings contained in this assignment.



## PayPal Payment Gateway (Early Adopter) - Enhancements

## PayPal Payment Gateway (Early Adopter) Enhancements

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Prior to this enhancement, the PayPal Payment Gateway integration was released with an Early Adopter label, but if it was necessary to process refunds for transactions, administrators needed to process refunds through the PayPal site and then add notes within the Cornerstone system separately.

With this enhancement, the PayPal Payment Gateway integration supports transaction management features, eliminating the need to perform additional bookkeeping for refunds. This functionality includes automatic refunds for users who withdraw from sessions.

In addition, in the Nov 9 2018 patch, a Tax Calculator integration will be made available for use with PayPal Payment Gateway, allowing organizations to calculate taxes dynamically using Cybersource and accept payments using PayPal.

### Use Cases

#### Use Case 1: Manual Refund

---

Ian is the business process owner and administrator at ACME Corporation, which is a well-known provider of software engineering courses. ACME uses Extended Enterprise to sell the content, and have enabled the PayPal Payment Gateway integration.

Ian receives a message from a customer about an accidental purchase. He is able to refund the customer's transaction from within the Cornerstone application, allowing him to later report on this transaction if needed.

#### Use Case 2: Automated Refund

---

Nazeema is the business process owner and administrator at ACME Corporation, which is a well-known provider of software engineering courses, including instructor-led training (ILT) sessions. ACME uses Extended Enterprise to sell the sessions, and Nazeema is able to add PayPal as an accepted payment method using the PayPal Payment Gateway integration because it is capable of supporting ACME's automated refund policies.

### Considerations

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- In order to perform refunds for PayPal transactions, the new Client ID field and Client Secret field must be added to the integration. Otherwise, attempting to initiate a refund for a PayPal transaction will result in an error. **See Obtain Client ID and Client Secret from PayPal** on page 316 *for additional information*.
- In order to use the PayPal payment gateway with the system, the default currency of the portal defined via Currency Preferences must be supported by PayPal. See: <https://developer.paypal.com/docs/integration/direct/rest/currency-codes/>
- The client logo set in the Cornerstone system is provided to PayPal to facilitate a consistent experience for users.
- When using the PayPal Payment Gateway, tax calculation functionality available in the LMS is NOT yet available for PayPal transactions. A Tax Calculator integration will be made available in a post-release patch.

## PayPal Payment Gateway Integration Enablement

To enable the PayPal Payment Gateway integration for your organization:

1. Add the PayPal Payment Gateway integration from the Edge Marketplace. To access the Edge Marketplace and specific information about the integration, go to: **ADMIN > TOOLS > EDGE** and click the **Marketplace** link.
2. Configure the integration via Edge Integrate. To access Edge Integrate, go to: **ADMIN > TOOLS > EDGE** and click the **Integrate** link.
3. Create a PayPal business account. See **Create PayPal Business Account** on page 318 *for additional information*.
4. Add PayPal as a payment account in the learning management system (LMS). See **PayPal Payment Gateway - Define Payment Account** on page 319 *for additional information*.
5. Enable PayPal as a payment method in User Payment Preferences.

**Note:** The backend setting for the PayPal Payment Gateway must be turned on in your portal in order for PayPal to be used as a payment method. This setting is automatically enabled when you install and configure the PayPal Payment Gateway integration.

The PayPal Payment Gateway Early Adopter integration is available as an integration via the Edge Marketplace. This Early Adopter integration may be right for your organization if your organization meets the following criteria:

- Either your organization does not charge tax, or your organization follows location-based tax requirements. - This Early Adopter enhancement leverages PayPal's existing tax functionality, which can be defined based on location. As part of the initial integration configuration, organizations must define these rules via PayPal.
- Your organization is aware of the following current exclusions which apply to this Early Adopter functionality:
  - PayPal cannot be used to purchase training units
  - PayPal cannot be used to charge session withdrawal fees or offer refunds
  - Recurring billing is not supported
  - Proxy purchasing is not supported

**Note:** Existing payment method functionality is unaffected by this enhancement.

**Note:** Organizations may test this functionality using a free PayPal sandbox account. Cornerstone Stage and Pilot portals are connected to the PayPal sandbox. To obtain sandbox credentials, go to: <https://developer.paypal.com/developer/accounts/>

## 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,	Edge

	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 Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
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
Transaction Manager - Manage	Grants ability to access the Manage Transaction page and also create and edit transactions. On the Order History Details page, the administrator can edit the order status, adjust prices, issue refunds, or enter comments. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration

## Obtain Client ID and Client Secret from PayPal

Prior to configuring the PayPal Payment Gateway integration, an organization must have a PayPal business account. To retrieve the **Client ID** and **Client Secret** values required for configuring a payment account in Cornerstone:

1. Go to: <https://developer.paypal.com/developer/applications/> and log in with your PayPal business account credentials.
2. Navigate to the My Apps & Credentials tab and click the **CREATE APP** button in the REST API Apps section. This allows the Cornerstone system to authenticate with PayPal and process refunds.
3. Name the application (this does not impact the integration) and associate the sandbox test account.
4. Click the **CREATE APP** button.
5. The App will be created and the administrator can copy the **Client ID** and **Secret** from this page for the sandbox environment into the Modify Payment accounts page in their Cornerstone Stage environment. **Note:** *These values do not expire, but they can be disabled by an administrator if needed.*

The screenshot shows the PayPal Developer interface for a user named John. The left sidebar contains navigation links for Dashboard, My Apps & Credentials, My Account, and Sandbox. The main content area is titled 'CSOD Test' and shows the 'Sandbox' environment selected. Under 'Sandbox API CREDENTIALS', the following information is displayed:

- Sandbox account:** jnguyen-facilitator@csod.com
- Client ID:** AXCzcmwIHQzu7w6ecXH4IZiML-VPXot8metcsZMwbaX1Tkp9w3b8ol7-hSHHrB9NEmPv-MPVmoeVgdjB
- Secret:** E8Crc8Gb6FEMojJSc5kCc00V4CmH1u1pixE2mIXPwmyixbzR0t8mTDtoyIEmy6Z (with a 'Hide' link)

A note states: "When you generate a new secret, you still maintain the original secret. The maximum number of client secrets is two. A client secret is either in enabled or disabled state." Below this, a table lists the secret details:

Created	Secret	Status	Action
Jul 10, 2018	E8Crc8Gb6FEMojJSc5kCc00V4CmH1u1pixE2mIXPwmyixbzR0t8mTDtoyIEmy6Z_xCpbX7vTd99r73_Tk	Enabled	...

A 'Generate New Secret' button is located below the table. At the bottom, there is a section for 'Sandbox Webhooks' with a link to 'Configure webhooks to notify your app when certain events occur. To configure a webhook, define your'.

In order to view the **Client ID** and **Secret** values for the Cornerstone Production environment, click the Live tab in the upper-right of the PayPal business account page and repeat step four in the Cornerstone Production environment.

The screenshot shows the PayPal Developer dashboard for an application named "CSOD Test". The left sidebar contains navigation links for Dashboard, My Apps & Credentials, My Account, Sandbox, Mock, and Live. The main content area is titled "CSOD Test" and features a "Sandbox" button and a "Live" button, with the "Live" button highlighted by a red rectangular box. Below the buttons, the "App display name" is "CSOD Test". The "LIVE API CREDENTIALS" section includes a note about live transaction features, the PayPal account "jnguyen@csod.com", the Client ID "AXB7703oIkCMjJOW4a2adbfnbFiSwSm0izxNnaONp16PMk110bk0L2Dsr47ZITuQrTkSwEjP6YKicPF", and the Secret "Show". The "LIVE WEBHOOKS" section provides instructions on configuring webhooks to receive notifications.

## Create PayPal Business Account

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If your organization does not currently have a PayPal business account, you can begin creating a business account either by phone or via the internet.

### Configure Business Account by Phone

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To create a PayPal business with the help of a PayPal employee, please use the following contact information:

Nichol Daniel

Sr. Inbound Account Executive

Contact Hours: 8am-5pm M-F CST

Phone: (402) 952-8539

Email: ndaniel@paypal.com

### Create Business Account Online

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If you do not currently have a PayPal account, you can create a business account by navigating to: <https://www.paypal.com/bizsignup/#/checkAccount>

1. Enter the email address that should be associated with the business account. PayPal will verify the email address is not already in use.
2. Create a password for the business account.
3. Provide the name of a business contact, a business name, a business phone number, the business address, and tax ID number.
4. When PayPal asks how your organization will process credit cards, select the **On your Website** option, and then select the **Process all payments, including debit and credit cards, through PayPal** option.
5. After completing the above steps, please email your Business Account email address to ndaniel@paypal.com, and a PayPal employee will ensure your account is configured correctly for use with the Cornerstone system.

## PayPal Payment Gateway - Define Payment Account

On the Define Payment Account page, administrators can configure the payment account for their PayPal business account. With this enhancement, the following additional fields are available in the PayPal Information section of this page:

- Client ID
- Client Secret

To access the Define Payment Account preferences page, go to **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > E-COMMERCE** and click the **Modify Payment Account** link. In the Payment Account section, click the Add icon to add a new payment account.

### Permissions

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

**Define Payment Account**

**Define Payment Account**

Name: HS Paypal Sandbox

Description:

**DEFINE CRITERIA**

**DEFINE PAYMENT GATEWAY**

PayPal

**PAYPAL INFORMATION**

Please enter PayPal information. The Client ID and Client Secret are generated by creating an app using PayPal Developer Tools.

Merchant Account ID: dp\_buyer\_pp\_US\_1524073361001324@paypal.com

Client ID: AdTe6iUCT7v9t\_NKxByvux7Mgw6LG4Wv8cw3SfF0OKKpuUT\_G4

Client Secret: EFO677h9xOC9Kd1xyFcusawYTjJN7iUEXkdHGGa\_k4Srv06DML

**MODIFICATION HISTORY**

Save Cancel

### PayPal Information

In the PayPal Information section, the administrator can populate the following fields:

- **Merchant Account ID** - Provide the email address or merchant account ID associated with your organization's PayPal business account. This field is required.



- **Client ID** - Provide the Client ID associated with your organization's PayPal business account. This field is required.
- **Client Secret** - Provide the Client Secret associated with your organization's PayPal business account. This field is required.

Access your PayPal information from the My Apps & Credentials tab of your PayPal Developer account. [See Obtain Client ID and Client Secret from PayPal](#) on page 316 *for additional information.*

Click the **SAVE** button to finish configuring the PayPal payment account.

For more information about creating a payment account: [See Create Payment Account.](#)

## PayPal - Manual Refunds

Administrators can manually initiate full and partial refunds for PayPal transactions via the Manage Transactions page.

To access the Manage Transactions page, go to **ADMIN > TOOLS > LEARNING > E-COMMERCE > MANAGE TRANSACTIONS**. Then, click on the order you want to refund.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Transaction Manager - Manage	Grants ability to access the Manage Transaction page and also create and edit transactions. On the Order History Details page, the administrator can edit the order status, adjust prices, issue refunds, or enter comments. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration
Transaction Manager - View	Grants ability to view the Manage Transaction page where the administrator can review the transactions that meet their permission constraints. This permission can be constrained by User's OU. This is an administrator permission.	eCommerce - Administration

**Order History Details Page: Cornerstone Administrator**

**Order Information**

Name : Cor  
User Name : ca  
Transaction Date : 7/11  
Transaction ID : 531  
Identifier : Cor  
Payment Method : Cre  
Order Status : Cor  
What do you think of John?: XX

**Details**

Title

Alcohol & Drug Testing: Driver Awareness Training

Add comment to History:

**ORDER HISTORY**

Alcohol & Drug Testing: Driver Awareness Training  
\* Time Zone: (UTC-08:00) Pacific Time

[Back](#)

**Alcohol & Drug Testing: Driver Awareness Training**

Payment Method: PayPal  
Unit Price: \$100.00 USD  
User Paid Percent: 100%  
Quantity Purchased: 1  
Subtotal: \$100.00 USD  
Item Total: \$100.00 USD  
User Paid: \$100.00 USD  
Previously Adjusted: \$-20.00 USD

Amount:  USD (Max: \$80.00 USD)

Note:

Note: Training Units charges will be charged to users' Training unit account. Otherwise, all monetary charges will be posted to users' cost center while refund will be issued in the original form of payment. Maximum refund cannot exceed the original amount paid.

**Options**

\$100.00  
\$100.00

## Manual Refund

---

To initiate a manual refund:

1. Click the Refund icon in the Options column next to the training you are refunding. A pop-up window appears.
2. In the pop-up, review the refund information and select a refund amount. Then add a note in the **Note** field explaining the refund.
3. Click the **SUBMIT** button to submit the refund.

If the refund is successful, the related refund information is reflected in the following locations:

- Manage Transactions page
- Order History
- Custom Reports
- Emails

*See [Refunds Overview](#) for more information about refunds.*

## Considerations

---

- If tax was applied to the transaction by PayPal, during the refund process the administrator should specify the pre-tax amount to refund to the customer. The maximum refundable amount to a customer is the sub-total amount. Once the refund is triggered, PayPal refunds the tax proportional to the amount refunded.
- If tax is not applied to the transaction, the amount refunded is not changed.

## PayPal - Automatic Refunds

If a session was purchased using PayPal, and the **Automate Refund Using Refund Terms** option is enabled, existing system refund logic is respected and the session is automatically refunded due to the user withdrawing from the session.

If the refund is successful, the related refund information is reflected in the following locations:

- Manage Transactions page
- Order History
- Custom Reports
- Emails

To enable automatic refunds for PayPal transactions, go to: **ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > ILT PREFERENCES**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
ILT Preferences - Manage	Grants ability to configure a variety of default settings that apply to new instructor led training events and sessions. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

**Cornerstone**

☒ Allow Waitlists (If selected, this preference can be overridden at the organizational unit level.)

Default Event Settings:

☒ Auto-manage waitlist

☐ Auto-register users who are granted waitlist request

☐ Allow waitlist deadlines

Default Event Settings:

Students have  days and  hours to register for a class after a waitlist opening is granted.

Waitlist expires  days and  hours before session start date.

☐ Limit users to one waitlist per event

**ENROLLMENT**

☐ Allow enrollment substitutions with organizational unit. (If selected, this preference can be overridden at the organizational unit level.)

**PAYMENT PREFERENCE**

☒ Allow refund terms setup.

☒ Automate refund using refund terms setting. Users will be refunded base on original form of payment

☒ Allow no show fee charge.

**INTEREST TRACKING**

☐ Remove users from interest tracking after  months.

☐ Remove users from interest tracking list after  matching sessions are offered.

**ILT GEOLOCATION SEARCH**

Configure radius search options for ILT Geolocation Search:

Options	Default
1	<input checked="" type="radio"/>
5	<input type="radio"/>
10	<input type="radio"/>
15	<input type="radio"/>
25	<input type="radio"/>

The following existing refund options are available in the Payment Preference section of ILT Preferences - General:

- **Allow Refund terms setup** - Select this option to enable administrators to set up refund terms when setting up an ILT event.
  - **Automate refund using refund terms setting. Users will be refunded based on original form of payment.** - This option is only available if the "Allow Refund terms setup" option is selected. Select this option to automatically issue refunds.
- **Allow no show fee charge** - Select this option to enable administrators to set up no show fees when setting up an ILT event.

*See [ILT Preferences - General](#) for more information about ILT Preferences.*

*See [Refunds Overview](#) for more information about refunds.*

## Mobile

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## Cornerstone Learn Curriculum Support

---

With a post-release patch, users of the Cornerstone Learn app will be able to launch curricula and view training items inside curricula from their transcripts via the Cornerstone Learn app. Users will also be able to launch and manage the training contained inside curricula on their transcripts.

Additional documentation about this feature will be made available in a post-release patch.

## Custom Banner Links in Cornerstone Learn

---

Prior to this enhancement, when using the Cornerstone Learn app, it was not possible to tap on the custom banner at the top of the Learner Home page to view the associated content attached by an administrator.

With this enhancement, when a user taps on a custom banner on the Learner Home page in the Cornerstone Learn app, the user is directed to the associated URL.

### Use Case

---

Sam is a learner who has recently downloaded the Cornerstone Learn mobile app so he can stay current on the training required for her role. She logs into the and views her Learner Home page. She notices a banner at the top of the page, which encourages her to check the company event calendar for details about an upcoming company event. She knows she will attend the event, but she wants to check the details of the event quickly, so she clicks on the banner and is navigated to the correct web page, where she checks the time and location of the event. She then taps the **BACK** button and returns to the Learner Home page to find new learning.

### Considerations

---

- The **Use Entire Image as Link** setting in Learner Home Preferences is ignored by the mobile app.
- The **Open Link in New Window** setting in Learner Home Preferences is ignored by the mobile app, as all links open in the app for ease of use.
- No button displays on custom banners in the Cornerstone Learn app.

### Implementation

---

This functionality is automatically enabled for the Cornerstone Learn app.

- When a user taps the banner, they are taken to the URL provided by the administrator who configured the banner link. A **BACK** button is available to allow the user to return to the app after viewing the link.
  - If the link is non-Cornerstone URL, it will open in a web browser page.
  - If the link is a deep link to a Cornerstone URL, the user will need to log into the Cornerstone system before being directed to the correct page.



## Performance

---

## Custom Reports - Performance Fields

With this enhancement, a new Reopened field is now available when creating a Performance Review custom report. This field returns a Yes or No value that indicates whether the performance review step was reopened. This field is available in the Performance Review Step section of the Performance Review custom report.

### How Does this Enhancement Benefit My Organization?

With this new field, organizations can now report on the status of the review step more completely.

### Considerations

If a reviewee reopens a performance review step, the whole step is marked as reopened. It is not possible to report on which reviewee reopened the step.

This field is not available for Reporting 2.0.

### Implementation

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

### Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Performance Review Report - Create	Grants ability to create and edit custom Performance Review reports. This permission can be constrained by OU, User's OU, User's Self and Subordinates, User's Direct Subordinates, and User's Subordinates.	Reports - Analytics
Custom Performance Review Report - View	Grants ability to view results of custom Performance Review reports created by self or shared by others. This permission can be constrained by OU, User's OU, User's Self and Subordinates, User's Direct Subordinates, and User's Subordinates.	Reports - Analytics

## Development Plan Redesign Enhancements

---

*This functionality was released with the August 17, 2018 patch.*

With this enhancement, the following features have been added:

- Redesigned development plans are displayed in the Actions tab of Universal Profile and the corresponding "Your Action Items" Welcome Page widget, if configured in the widget settings.
- Administrators can use the relative system role "approver" as the approver for redesigned development plans. This is configured in Development Plan Preferences.


## How Does this Enhancement Benefit My Organization?

---

These enhancements elevate development plan usability and flexibility.

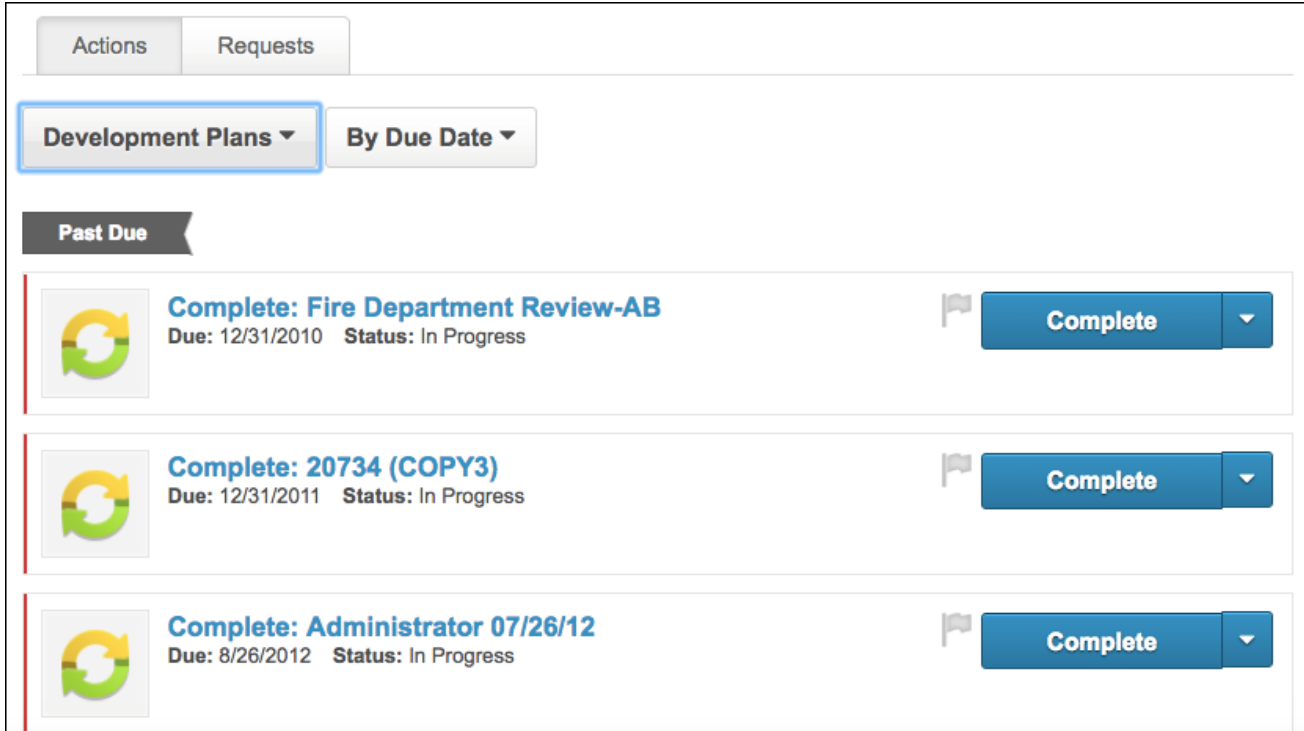
## Development Plan Action Item

---




On the Actions tab of Universal Profile, development plans display with this icon . The plan name, due date, and status also displays. You can filter the page by Development Plans so that only your development plan actions display.

Clicking the **COMPLETE** button or the plan title opens the Manage Plan page. You can also access the **Universal Profile > Snapshot > Development Plans** page by clicking **View All** in the actions drop-down.

Development plans that are in a Completed or Cancelled status do not appear on the Actions tab or "Your Action Items" widget.



The screenshot shows a web interface for managing development plans. At the top, there are two tabs: "Actions" and "Requests". Below them, there are two dropdown menus: "Development Plans" and "By Due Date". A "Past Due" banner is visible. The main content area displays a list of three development plans, each with a circular icon, a title, a due date, a status, and a "Complete" button with a dropdown arrow.

Icon	Title	Due Date	Status	Action
	<b>Complete: Fire Department Review-AB</b>	Due: 12/31/2010	Status: In Progress	<a href="#">Complete</a>
	<b>Complete: 20734 (COPY3)</b>	Due: 12/31/2011	Status: In Progress	<a href="#">Complete</a>
	<b>Complete: Administrator 07/26/12</b>	Due: 8/26/2012	Status: In Progress	<a href="#">Complete</a>

## Action Items Widget

On the Welcome Page, users can now access their development plan by clicking the link in the Action Items widget. This opens the Manage Plan page.

## Development Plan Approvers

For development plan approvers, the **View Development Plan** link in the "Your Action Items" widget on the Welcome Page is changed to **View Development Plan Approvals**.

In addition, approvers can now use the relative system role "Approver" as the approver for development plans. Development Plan Preferences are updated to include "Approver" as an option in the Plans must be approved by field in the Manager Allowances section.

**General**

Page instructions for creating development plans

**B** *I* ~~S~~ U | I<sub>x</sub> H1 H2 H3 H4 H5 H6 | 1= 2= | 🔗 🗨️ 📅 🖼️ ↶️ ↷️ 🔄

Define your development plan by adding objectives, action steps and/or training.

**Manager Allowances:**

- ☒ Allow managers to create and assign development plans for their subordinates
- ☒ Allow managers to edit their development plans for their subordinates
- ☒ Allow managers to approve/deny multiple development plans at once
- ☒ Plans must be approved by 

Approver

## Implementation

This functionality is automatically enabled for all organizations using the redesigned Development Plans functionality.

To self enable redesigned development plans, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > CORPORATE PREFERENCES**.

## Security

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Development Plan Preferences - Manage	Grants ability to manage Development Plan Preferences, where various Development Plan features can be enabled or disabled according to the needs of the organization. This is an administrator permission.	Performance - Administration

## Performance Review Task Administrator Visibility Enhancement

---

## Performance Review Task Administrator Visibility Enhancement - Overview

Prior to this enhancement, organizations could not restrict an administrator's visibility to a specific performance review task. If an administrator had the *Performance Review Task Administration* permission, then they could access all performance review tasks.

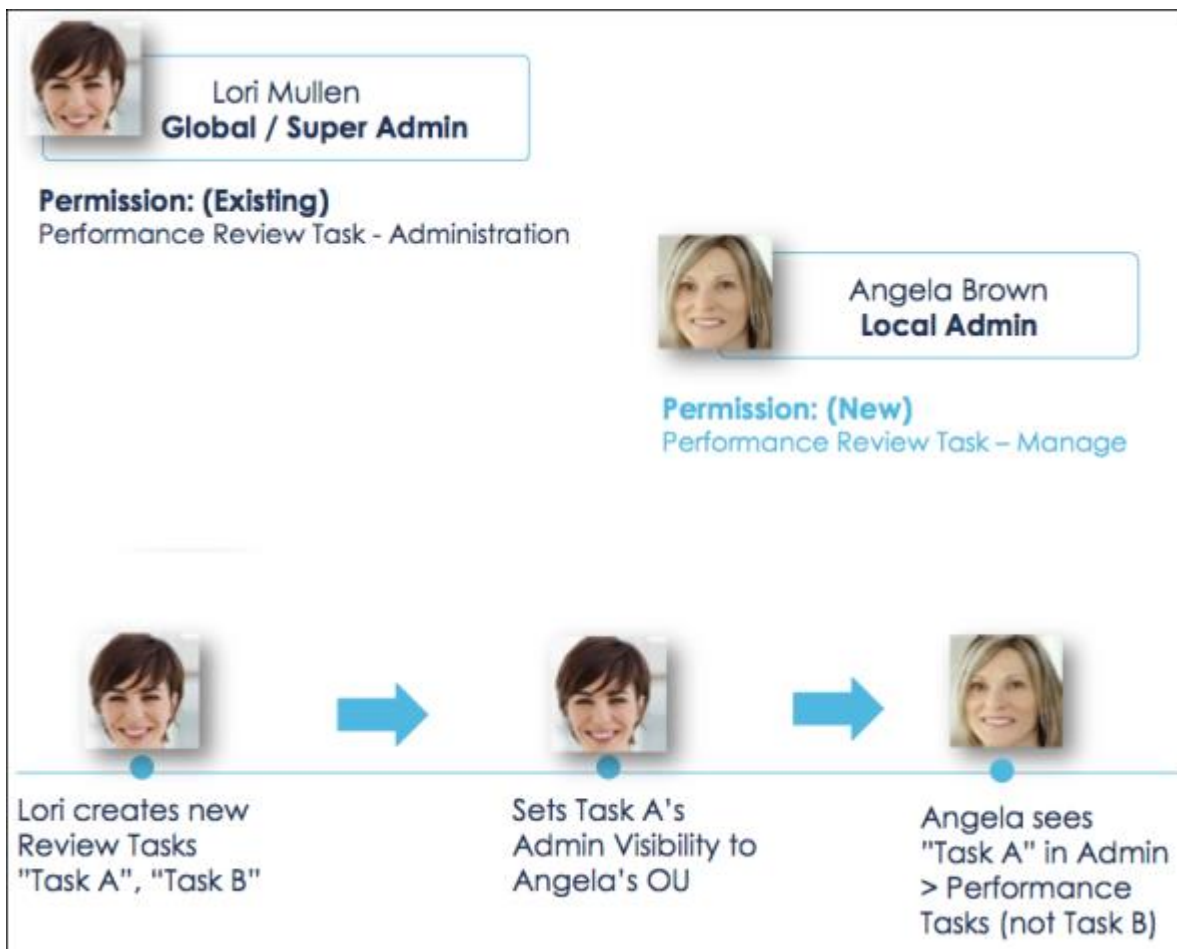
With this enhancement, administrators can now control which administrators can view and administer each performance review task. This access is managed with a new *Performance Review Task - Manage* permission and a new Admin Visibility section within the task settings.

*This functionality is available in Stage portals as of October 9.*

## How Does this Enhancement Benefit My Organization?

This enhancement provides improved review task visibility controls to allow super/global administrators to delegate management of tasks to other administrators more effectively.

## Workflow



## Use Cases

---

1. Lori is the global administrator who creates all performance review tasks. Her organization has many offices globally, each having multiple review tasks. As a result, Lori needs to create over 200 tasks for the organization each year.
2. There are a few regional administrators, such as Angela who is administrator for a particular region. In Angela's region, they have 13 different offices, each having their own performance review task.
3. In order to delegate the management of the performance review task to regional administrators to allow them to extend dates, add users etc., Lori would like to make sure regional administrators such as Angela will only see tasks relevant to her region and can manage them on a day-to-day basis.
4. Lori assigns regional administrators the Performance Review Task - Manage permission with the appropriate constraints, and she configures each task with the appropriate Admin Visibility settings.

## Implementation

---

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

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

For existing performance review tasks, the Admin Visibility section is empty. For these tasks, only administrators who have the Performance Review Task Administration permission can access the task.

*This functionality is available in Stage portals as of October 9.*

## Security

---

The following new permission applies 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	Performance - Administration



	permission control which users can be added to the task.	
--	--	--

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

## Performance Review Task Administration - Admin Visibility

With this enhancement, organizations can now control which administrators can access view and administer a performance review task. This is controlled with the Performance Review Task - Manage permission and the Admin Visibility settings within the task.

When an administrator accesses the Performance Review Task Administration page, they are only able to view and administer a task if they are within the Admin Visibility of the task and they have permission to manage performance review tasks. This includes adding users, viewing task details, and editing the task.

*This functionality is available in Stage portals as of October 9.*

To access Performance Review Task Administration, go to **ADMIN > TOOLS > PERFORMANCE MANAGEMENT > TASKS**.

### Permissions

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 can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

## Performance Review Task - Set Admin Visibility

With this enhancement, a new Admin Visibility section is now available on the General page when creating a performance review task. This section enables administrators to define which administrators can view and administer the task.

*This functionality is available in Stage portals as of October 9.*

To create a performance review task, go to **ADMIN > TOOLS > PERFORMANCE MANAGEMENT > TASKS**. Then, click the **Create a Performance Review Task** link.

### Permissions

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 can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

General

Review Workflow

Review Summary

Visibility

Confirm

Define Performance Review Task Show Me

General

Task Name:

Description:

Instructions:

Design

HTML

Task Type: Standard

Category: Select Category

☐ Hide review from reviewee's Manager and Indirect Manager in My Team

DATE CRITERIA

When can the review task be assigned (Task Period)?

From: To:

When is the entire review due?

☐
☐ 30 Day(s) from when the review is assigned

ASSIGNMENT CRITERIA

☒ All reviews will be assigned at the beginning of the Task Period.
☐ Reviews will be assigned based on each Employee's Select Date Field

REVIEW PERIOD

☒ From: To:
☐ The review period will be based on when the Employee's review is assigned.

AVAILABILITY

The availability criteria that you select will only include employees who meet the following criteria: (User is or below Cornerstone Admin)

Select Criteria

ADMIN VISIBILITY

Administrators in the below Admin Visibility who has Performance Review Task Administration - Manage permission will be able to view, edit this task.

Note: Administrators with Performance Review Task Administration will always see all tasks and are not impacted by this visibility.

Select Criteria

RATINGS DISPLAY

Display all ratings as:

☐ Numeric
☐ Text
☒ Both

OVERALL RATING SCALE

Score	Rating	Description
5	Excellent	Employee constantly far exceeds what is expected of them
4	Exceeds Expectations	Employee consistently exceeds job expectations
3	Acceptable	Employee meets basic job expectations, but rarely exceeds them.
2	Marginal	Employee fails to meet job expectations and is not solution oriented.
1	Unsatisfactory	Employee is consistently lazy or refuses to do their job.

☐ Auto-score Overall Performance Review Scores

ATTACHMENTS

☐ Allow reviewers to attach up to three relevant files to this review.

EMPLOYEE INFORMATION

The employee's full name and position already appear on the review.

Cancel

Next »

## Admin Visibility

---

This is a new section.

This section enables administrators to define which administrators can view and administer this task. Only administrators who are within the defined Admin Visibility and who also have permission to manage performance review tasks can view and administer this performance review task. **Note:** *Administrators who have the Performance Review Task Administration permission can always view and administer all performance review tasks, and they are not impacted by this setting.*

To define the administrator visibility for the task, add one or more users or organizational units (OUs) to this section.

## Recruiting

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## Candidate Password Reset

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## Candidate Password Reset Overview

*This enhancement was released as part of the 7 September 2018 Patch Release.*

With this enhancement, recruiters can now reset a candidate's password. This provides an alternative workflow for recovering candidate accounts by allowing users who have the appropriate permission to change the password.

Prior to this enhancement, candidates could reset their password by clicking **Forgot my Password** on the log-in page of a career site. However, candidates needed access to the email account they used to create their career site account. Without access to that email, candidates could not reset their password. Instead, recruiters would have to ask candidates to create a new account. This resulted in the potential for duplicate applications and lost progress.

Now, recruiters will be able to reset the password using a new **Reset Candidate Password** option that will be added to the Applicant Profile page. This option will only be available to recruiters who are assigned the permission to access the feature. The temporary password will expire after 48 hours.

## Implementation

This functionality must be self-enabled from the **Feature Activation Preferences** page.

## Considerations

- Candidates will not be informed that the password expires in 48 hours. This information can be included in the Admin Password Change email.
- The career site will not include messaging that candidates can contact the career site administrator to have their password reset.
- When a candidate's account gets merged to another account, they are no longer able to log in. Even if the recruiter resets their password, they will still not be able to log in.

## Security

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Reset Candidate Password	Grants ability to change a candidate's password. This permission controls the ability to see the <b>Reset Candidate Password</b> option in the Options drop-down on the Applicant Profile page. The option is only visible to users with this permission. This permission cannot be constrained.	Recruiting

The following existing permissions apply to this functionality:

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



NAME		
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	<p>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.</p> <p><b>Note:</b> 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 <b>Requisition: Manage</b> permission overrule those of the <b>Requisition: Owner</b> permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting

## Feature Activation Preferences - Reset Candidate Password

---

The Reset Candidate Password functionality must be self-enabled on the Feature Activation Preferences page. To enable this functionality:

1. Go to **ADMIN > TOOLS > RECRUIT > FEATURE ACTIVATION PREFERENCES**.
2. Click **ACTIVATE** in the Reset Candidate Password section. The functionality is now enabled.

You can deactivate this feature by clicking **DEACTIVATE** in the Reset Candidate Password section. The deactivation option only displays after activating the feature.

## Applicant Profile Page - Reset Password

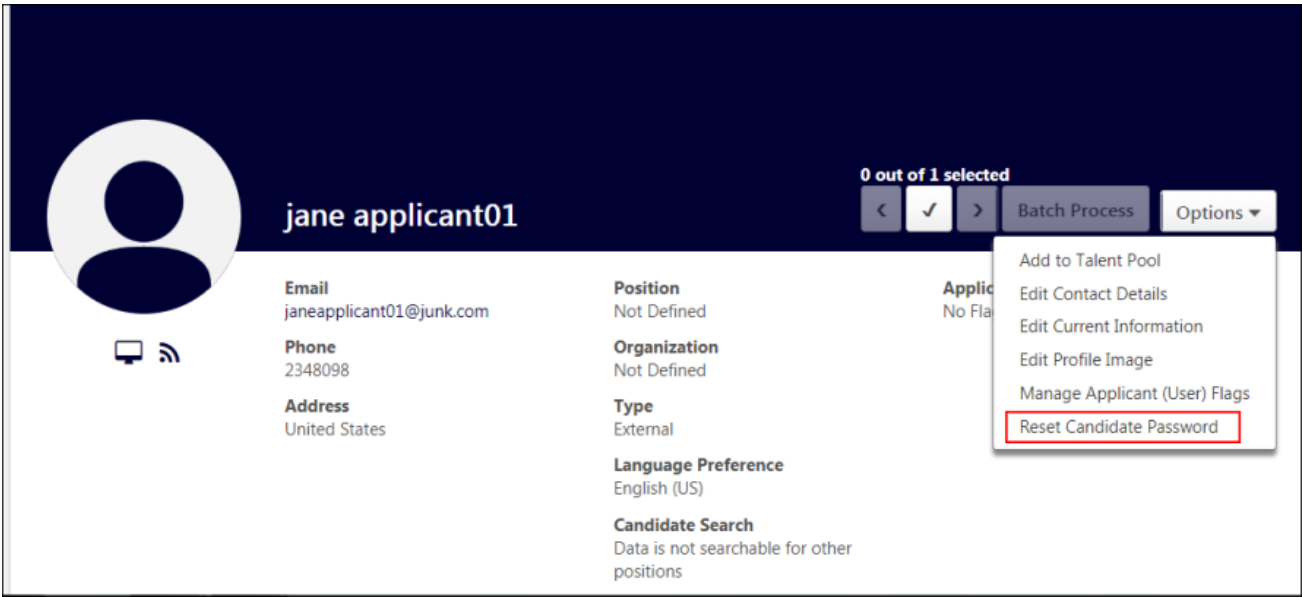
With this enhancement, a **Reset Candidate Password** option is added to the Applicant Profile page. This option lets recruiters reset a candidate's password directly from their profile so that the candidate can quickly get back into the career site and return to the application process.

This option is only available to recruiters who are assigned the permission to reset a candidate's password.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Reset Candidate Password	Grants ability to change a candidate's password. This permission controls the ability to see the <b>Reset Candidate Password</b> option in the Options drop-down on the Applicant Profile page. The option is only visible to users with this permission. 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	<p>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.</p> <p><b>Note:</b> 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 <b>Requisition: Manage</b> permission overrule those of the <b>Requisition: Owner</b> permission. For requisition</p>	Recruiting

*owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*



### Reset Candidate Password

To reset the password:

1. Click **Reset Candidate Password**. This opens the Reset Candidate Password pop-up.

## Reset Candidate Password: jane applicant01

The new password must match the following criteria:

- \* Passwords must contain alpha and numeric characters
- \* Passwords cannot have three or more consecutive same characters
- \* Passwords must be 5 - 9 characters

This password is temporary and will expire in 48 hours. Passwords are sensitive information and should be changed only upon request by the affected user.


New password

Confirm password

Cancel
Save

2. Enter the new password in the **New password** field.
3. Enter the new password again in the **Confirm password** field.
4. Click **SAVE**.

Once the new password is saved, the following occurs:

1. Admin Password Change email is sent to the candidate, provided the email is active and configured in **Email Management**. **Note:** *This is an existing email. Triggering the Admin Password Change email does not also trigger the User Password Change email.*
2. Applicant Feed on Applicant Profile page is updated to include the password change event from the recruiter. **Note:** *The Applicant Feed is accessed by clicking the Applicant Feed icon  on the Applicant Profile page.*
3. Temporary password is valid for 48 hours.
4. Candidate is emailed a notification of the password change by the administrator. **Note:** *The administrator is advised to convey the new password to the candidate via phone or other means. The career site log-in link and/or the new password are not included as email tags.*
5. Candidate logs in to career site using their user name and temporary password.
6. Candidate is immediately prompted to change their temporary password and cannot access the career site until they do this.
7. Candidate changes their temporary password and can now access the career site. This triggers the User Password Change email, which sends notification to the candidate's

email stating that their password has been changed and what action they can take if they did not make the password change. The User Password Change must be active and configured in **Email Management** in order for the email to fire.

8. Applicant Feed on Applicant Profile page is updated to include the password change event from the candidate.

### **Consideration for Merged Users**

When a candidate's account gets merged to another account, they are no longer able to log in. Even if the recruiter resets their password, they will still not be able to log in.

## Compliance Update to Flattened Application

---

*This functionality will be available as part of the 9 November 2018 post-release patch.*

With this enhancement, the employer's name, logo (from **Corporate Preferences**), and requisition address (from **the requisition**) will be added to all flattened applications (i.e., the PDF version of the application) to support Federal Motor Carrier Safety Administration (FMCSA) compliance requirements.

Prior to this enhancement, the flattened application only had information about the candidate and did not contain information about the employer. The company's name and address were not included, and there was no branding of the employer, such as a company logo. In addition, the flattened application was not compliant with FMCSA compliance regulations Section 391.21(b).

## How Does this Enhancement Benefit My Organization?

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### FMCSA Compliance

#### Key Details that Candidates Can Use

This enhancement is especially beneficial to organizations that have driving positions and organizations that need to be compliant with FMCSA. This is also highly beneficial to organizations that circulate flattened applications to external users, because the application will contain more detail about the employer.

## Considerations/Exclusions

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- The features in this enhancement will be added to all flattened applications that are generated after the release date, but will not be added to any historical flattened applications.
- The corporate logo image will not be resized to fit the flattened application. If the uploaded image is large, then it will also be large on the flattened application.
- The corporate logo image will be pulled from the Corporate Preferences page. Images uploaded here are generally smaller to fit the header of the organization's portal. However, large corporate logos have the potential to make the flattened application slightly longer.
- The address will be pulled from the requisition to which the candidate has applied. If the requisition has both a primary and secondary address, the primary address will be used.
- If a requisition does not have an address, then the line item will not appear on the flattened application.
- For compliance reasons, the features in this enhancement are not configurable.

## Implementation

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This functionality is automatically available for all organizations using Recruiting.

## Security

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The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration



## Custom Fields on Mobile-Friendly Career Site

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## Custom Fields on Mobile-Friendly Career Site Overview

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With this enhancement, portals that have enabled Mobile-Friendly Candidate Experience (Early Adopter) can now add Custom Requisition Fields as filters on their mobile-friendly career sites. This lets you have a number of custom filters on your career sites so that candidates can search for jobs based on all of those different types of custom filters, for example, compensation type, salary, experience level, or job function.

This enhancement supports the following custom field types with this release:

- Dropdown
- Radio Button
- Checkbox

This enhancement is part of Mobile-Friendly Candidate Experience. [Click here to download the Mobile-Friendly Candidate Experience \(Early Adopter\) starter guide.](#)

## How Does this Enhancement Benefit My Organization?

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### Targeted Job Searching

### Faster Job Visibility

### Higher Applicants

Prior to this enhancement, the job search options on mobile friendly career sites did not match candidates' expectations when searching for a job. Competing sites let candidates search by personal fields like commute time, salary, and experience level. Most importantly, many sites let candidates search by job function allowing candidates to quickly pull up jobs that closely matched their skills.

Some clients using the Mobile-Friendly Candidate Experience were only leveraging the mobile friendly application workflow because they could not add custom requisition fields to mobile friendly career sites.

Now, clients can provide candidates the filters they need to find jobs that specifically match their skillset, compensation type, experience level, etc. Candidates will not need to look through a long list of jobs to find the right fit. The custom field filters will help them to quickly narrow down their search so that they can start applying.

### Use Case

1. Sarah is an administrator at ACME. She does not have custom requisition field permissions. Sarah would like to convert an existing Standard Career Site to become mobile friendly because she just heard custom requisition fields are now supported.
2. Sarah goes to the Admin > Tools > Recruiting > Career Site and selects the career site she would like to edit. This career site already includes custom requisition fields. She clicks **CONVERT TO BE MOBILE FRIENDLY**. She accepts the dialog, and successfully converts the career site to become mobile friendly.
3. Even though the original Standard Career Site had custom requisition fields configured, the new Mobile Friendly career site will not add them automatically. Sarah will need to re-add the custom requisition fields to the newly converted career site.

4. Sarah will click **Add Custom Requisition Fields** in the new Add Custom Requisition Fields to Career Site section to search for and add fields.
5. In the Select Custom Requisition Field pop-up, she can add custom fields that are Dropdown, Radio Button, and Check Box field types.
6. Sarah can search for the desired field, which will narrow down the results by keyword. Or, she can paginate through the list of fields to add them to the career site.
7. The fields will display on the career site, in the order they are listed in the admin panel.
8. Once Sarah selects her desired fields, she can choose to highlight a drop-down custom field in the main search. She can also allow the field to work as a multi-select field. Only drop-down fields can be added to the main search. When this field is added in the main search, it will also appear on the left rail of the career site.
9. Once Sarah is done configuring the new career site, she would like to link to it from her corporate site. But, rather than linking the entire list of requisitions, Sarah would like to link to only the intern positions, not full-time or part-time positions. These are positions types and are added as a custom requisition field to the requisition and career site.
10. Sarah can visit the active career site, select "Intern Positions" from the filter, and copy the URL. Sarah can use that URL in her corporate site. When a candidate visits that URL, the filter option of "Intern Positions" will already be selected as a filter.
11. Jon is a college student and would like to Intern at ACME. Jon visits ACME's corporate site, and clicks the link that says, "See all Open Intern Positions." Job is taken to the CSOD career site.
12. Jon sees all open intern positions because the filter is selected. Jon would like to filter the results to a job function that matches his goals. Jon uses the drop-down to filter requisitions by "Software Engineer" and sees all Software Engineering Intern positions.

## Implementation

*This functionality was released to Stage portals during the first week of user acceptance testing (UAT).*

In addition, this functionality is only available after you have self-enabled Mobile-Friendly Candidate Experience (Early Adopter). [See Enable Mobile-Friendly Candidate Experience.](#)

This functionality will be available in Pilot/Production portals on 26 October 2018 as part of the October '18 release.

## Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
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## Add Fields to Career Site

A new Add Custom Requisition Fields to Career Site section is added to the career site settings page for mobile-friendly career sites. This section lets you add Custom Requisition Fields as filters on the career site.

The following field types are available with this release:

- Dropdown
- Radio Button
- Checkbox

To create a mobile-friendly career site, click the **Add Mobile-Friendly Career Site** option on the Career Site Management page.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

Add Custom Requisition Fields to Career Site

Add Custom Requisition Fields to Career Site:


+ Add Custom Requisition Field



To add Custom Requisition Fields:

1. Click **Add Custom Requisition Field**. This opens the Select Custom Requisition Field pop-up.
2. Select a field from the list. The field types are Dropdown, Radio Button, and Check Box. Only one field can be selected at a time.
3. Selecting a field closes the pop-up and adds the field to the page.

When more than one field is added, you can reorder them by dragging and dropping them into the desired order.

Once a field has been added, the following information and options are available in the panel.:

- **Name** - This column displays the name of the custom field.
- **Question Type** - This column display the type of custom field: Dropdown, Radio Button, or Check Box.
- **Allow Multi-Select** - Check the box to let applicants select more than one option from a drop-down custom field when it appears on the career site. This option is unchecked by default. When this is select, a dropdown field will appear as check boxes on the left rail of a career site.
- **Select a field to highlight in main search** - Check the box to enable the **Include in Main Search** option. Having a field highlighted in the main search means that the field will appear in the search bar at the top of the career site. The field will also appear in the Filters section on the left side of the page, but having it at the top helps candidates find the filter quickly and start searching for jobs. This is only available for drop-down fields.
- **Include in Main Search** - Select this option to display the custom field in the main search. Only one field can be selected.
- **Delete** - Click the trash can  icon to remove the field from the career site.

Add Custom Requisition Fields to Career Site					
	Name	Question Type	Allow Multi-Select	Include in Main Search	
Add Custom Requisition Fields to Career Site:	Job Function	Dropdown	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	
	Position Type	Dropdown	<input type="checkbox"/>	<input type="radio"/>	
+ Add Custom Requisition Field			<input checked="" type="checkbox"/>	Select a field to highlight in main search	

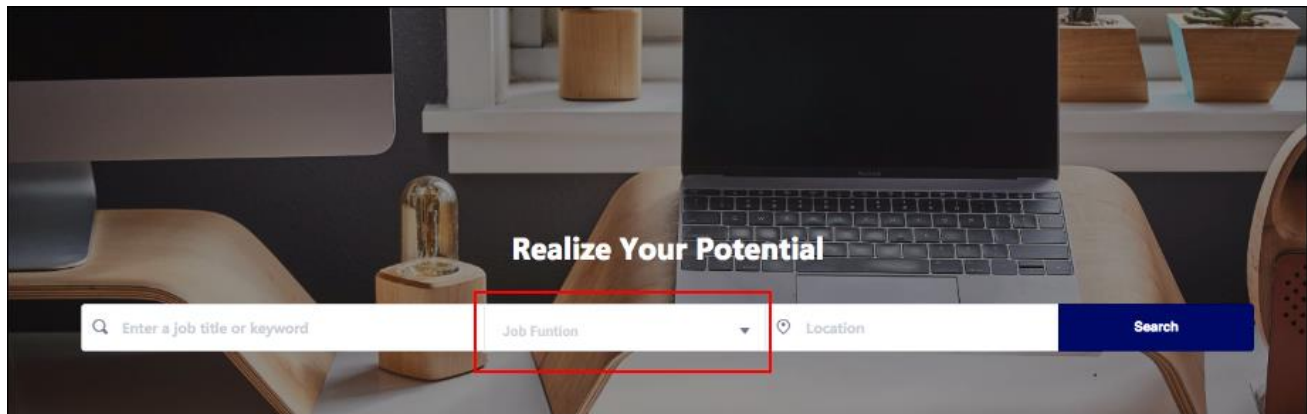
## Career Site - Custom Requisition Field Filters

With this enhancement, Custom Requisition Fields can now be added as filters on mobile-friendly career sites. The filters display on the job search page.

If **enabled by the administrator when configuring the career site**, drop-down custom field will appear in the search bar area at the top of the page between the keyword and location fields. Having a custom field filter at the top helps candidates find the most relevant filter quickly and start searching for jobs. This field will also be included on the left panel of the career site. When an option is selected in the main search, it will also be displayed on the left panel and vice versa.

For filters that appear in the Filters section, each custom field appears as a separate filter.

When a dropdown field supports multiple options, candidates will be able to select from check boxes, even though the field type is a drop-down.



## Frequently Asked Questions - Career Site Custom Fields

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### [How do I create Custom Requisition Fields?](#)

Custom Requisition Fields are created as **Organizational Unit (OU) type custom fields in Custom Field Administration**. You must have permission to create OU custom fields.

### [If I migrate a standard career site to become mobile friendly, and the standard career site had custom requisition fields added, will they carry over?](#)

Not with this release. You will need to edit the career site and add the custom requisition fields again.

### [What happens if the custom requisition field is made inactive? Will the filter still be available on the career site?](#)

Yes. Historical requisitions will still have this field specified. You can edit the career site at any time to remove the filter if desired.

### [Who can add custom requisition fields to career sites?](#)

Similar to current functionality, anyone who has the permission to create career sites will have the ability to add custom requisition fields to the career site. This is true even if an administrator does not have the permission to see the custom requisition field at the requisition level.



## First Advantage (FADV) Background Check Enhancements

With this enhancement, additional job requisition data will be passed automatically to First Advantage (FADV) so that the data does not need to be entered manually in FADV by the recruiter.

The following job requisition data applies, as defined on the Facility Location pop-up when configuring the **Primary Location** field on the General tab of the job requisition:

- **City** - This is the city of the job requisition's primary location.
- **State** - This is the state of the job requisition's primary location.
- **Country** - If "United States" is the value in the **Country** field for the job requisition's primary location, then Cornerstone will automatically pass this information. If "United States" is not the value for the **Country** field, then the values for city, state, and country will not be passed to FADV.

If one or more of the above fields is blank, then no data is passed to FADV for any of these fields. All three of the above fields must have a value in order for the data to be passed.

Facility Location

Each requisition must have a valid Requisition Facility Location Address in order to be searchable with geolocation on the Career Site. The map provider will use the information entered here to approximate the location. More accurate results can be achieved when complete address information is provided.

Country

United States

Address #1

1601 Cloverfield Blvd.

Address #2

Suite 600 South

City

Santa Monica

State/Province

California

Postal Code

90404

Cancel

Save

## Implementation

This functionality is targeted to be available in Stage portals with the October 11 Stage deployment. The functionality will be automatically enabled for portals that have an active background check integration with FADV.

It is necessary to have Succession and Form Management enabled if a client wants to send Resume and Reference data to FADV.

The FADV background check integration must be enabled and activated through the Edge Marketplace. Portals must have already purchased FADV in order to enable it in Edge.

## Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Initiate Background Check	This permission grants access to manage background checks from the Applicant Profile page. This applies to background checks that have been configured in the Integration Center. This permission cannot be constrained. Users who have this permission will have an Assign to Applicant link in the background check status type panel on the Applicant Profile page. Once the background check is assigned, the page will display "Assigned - [Date Assigned]."	Recruiting
Applicant Status Bank - Manage	Grants ability to access and manage Applicant Status Bank.	Recruiting Administration
Applicants: View Background Check Status	Allow user to view the background check status. The user cannot view the link to the detailed report. This permission cannot be constrained.	Recruiting
Applicants: View Background Check Status and Details Link	This permission allows users to view the background check status and view a link to access the background check report, which can be found in the background check status type panel on the Applicant Profile page. This permission cannot be constrained.	Recruiting
Application Workflow Template - View	Grants ability to access and view Application Workflow Templates.	Recruiting Administration
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	Recruiting

	OU, User's OU, and Grade.	
Requisition: Owner	<p>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.</p> <p><b>Note:</b> 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 <b>Requisition: Manage</b> permission overrule those of the <b>Requisition: Owner</b> permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting
Requisition: Reviewer	<p>Enables reviewer to access requisitions and applicants for requisitions for which they are a reviewer. This permission cannot be constrained.</p> <p><b>Note:</b> 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.</p> <p><b>Note:</b> If an applicant reviewer is removed as a reviewer via the Applicant Profile page, the <b>Requisition: Reviewer</b> 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 <b>Requisition: Reviewer</b> permission. See <a href="#">Applicant Profile Page Overview</a> for more information about duplicate</p>	Recruiting

<i>reviewer instances.</i>	
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## LinkedIn Recruiter System Connect

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## LinkedIn Recruiter System Connect Overview

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LinkedIn Recruiter System Connect bridges the information gap between Cornerstone Recruiting and LinkedIn Recruiter by making candidate communication, notes, and application information available in both places. With this integration, a recruiter will no longer need to look up a candidate in both systems to get a complete picture of the candidate.

### How Does this Enhancement Benefit My Organization?

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#### **Full Candidate Picture in LinkedIn and Recruiting**

#### **Drives Quicker and Easier Informed Decisions**

#### **Enhances Usability**

LinkedIn Recruiter System Connect delivers a holistic view of the candidate in both LinkedIn and Cornerstone Recruiting, giving recruiters the information they need to make informed decisions more quickly.

Prior to this enhancement, LinkedIn Recruiter data only displayed in LinkedIn Recruiter, and Recruiting information only displayed in Recruiting. This meant recruiters had to look up the candidate in both applications to get a complete view.

Now, recruiters can view all LinkedIn Recruiter information in Recruiting and vice versa, including InMail History, Notes, and Profiles. This provides a candidate picture in both applications. This also saves time and supports more informed decision-making by being able to look up candidate information in whichever application the recruiter is in.

### What LinkedIn Recruiter Information Is Available in Cornerstone?

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#### InMail History

A candidate's InMail history will display on the Emails tab of the Applicant Profile page. The date, sender, subject, and message body is included. InMail will appear with "via LinkedIn" next to the name of the user who sent the email. Attachments are not included. InMail history will only be visible to users who have a LinkedIn Recruiter seat on the same contract.

#### Prospect Notes

Notes that are created in LinkedIn Recruiter will be visible on the Comments tab on the Applicant Profile page. LinkedIn Recruiter notes will appear with "via LinkedIn" next to the name of the user who submitted the comment. Notes will only be visible to users who have a LinkedIn Recruiter seat on the same contract.

#### LinkedIn Profiles

A candidate's LinkedIn profile will be visible on a new "LinkedIn" tab on the Applicant Profile page. This tab will be available for all portals that enable LinkedIn Recruiter System Connect. Users with a LinkedIn Recruiter seat will be able to see the full LinkedIn profile, including links to save the candidate to a project, send an InMail, or choose to be notified when the candidate updates their LinkedIn profile. Users without a LinkedIn Recruiter seat will see the candidate's public LinkedIn profile.

## Considerations/Exclusions

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- Application data can be deleted from LinkedIn. Cornerstone will send deletion requests when triggered by the candidate or after the period of inactivity specified by a client.
- Jobs must meet the following criteria to sync to LinkedIn:
  - "External Description" must contain at least 100 characters.
  - The **Primary Location** field must include a value for the **Country** field.
  - The **Primary Location** field must include a value for either the **City** field or the **State/Province** field.
- This integration is only available in Production environments.
- **Before implementation of the 9 November 2018 patch release**, permission constraints in Cornerstone that limit the requisitions and applicant information to which a recruiter has access are not reflected in LinkedIn Recruiter with the LinkedIn Recruiter System Connect integration. After the 9 November 2018 patch release, constraints will be synced from Cornerstone to LinkedIn and will begin restricting the Cornerstone information that recruiters can see in LinkedIn Recruiter.

### [Permission Constraints Use Case](#)

John Smith is a recruiter at Acme Co. who is constrained to the Sales division, which means he cannot see requisitions in the Engineering Division or application information from candidates who applied to requisitions in the Engineering division. John has access to LinkedIn Recruiter. If Acme Co. enables the LinkedIn Recruiter System Connect integration before the 9 November 2018 patch release, then when John looks at LinkedIn Recruiter, he will be able to export candidates to open requisitions in Sales, as well as all other divisions. Additionally, if John views the LinkedIn profile of a candidate who applied to an Engineering position, he will be able to see which jobs the candidate applied to, as well as any status information, notes, and interview feedback for those roles. After the 9 November 2018 patch release, John's constraints will be synced from Cornerstone to LinkedIn and will begin restricting the Cornerstone information that John can see in LinkedIn Recruiter. He will only be able to export candidates to requisitions in the Sales division, and he will only see Cornerstone application details for candidates who applied to Sales requisitions.

## Implementation

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This feature will not be available in Stage or Pilot portals. This feature will be available in Production portals upon implementation of the October '18 release on 26 October 2018.

The option to activate LinkedIn Recruiter is available for all portals with Recruiting enabled. However, a LinkedIn Recruiter subscription is required for activation. LinkedIn Recruiter can be purchased through LinkedIn.

## Security

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The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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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
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
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	<p>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.</p> <p><b>Note:</b> 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 <b>Requisition: Manage</b> permission overrule those of the <b>Requisition: Owner</b> permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting
Requisition: Reviewer	Enables reviewer to access requisitions and	Recruiting



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.*

## Enable LinkedIn Recruiter System Connect

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To enable the LinkedIn Recruiter System Connect integration, the client administrator must perform the actions listed below. The activation of the integration is a one-time activity.

1. Navigate to **ADMIN > TOOLS > EDGE > MARKETPLACE**.
2. Click the LinkedIn Recruiter System Connect integration icon. This opens the Edge Integrations page.
3. Click **INSTALL**. This opens terms and conditions page.
4. Check to accept the terms and conditions.
5. Click **INSTALL**. This opens a pop-up to indicate that the installation was successful.
6. Click **CONFIGURE NOW** in the pop-up to configure the integration. This opens the Setup page within Edge.
7. Click the option to sign in to your LinkedIn account to enable the configuration options. Then, follow the prompts to enable.

To view detailed LinkedIn instructions for enabling the integration, click the **Getting Started** link on the Setup page. A "LinkedIn Recruiter System Connect Enablement Guide" is available to download.

## Additional Information

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- You must have an existing LinkedIn Recruiter account with LinkedIn.
- No migration is required.
- The integration comes with Recruiting at no additional cost.
- The integration cannot be purchased independently of a product line.

## Permission Constraints

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### The Following Is Important Information About Permission Constraints Until 9 November 2018:

**Before implementation of the 9 November 2018 patch release**, permission constraints in Cornerstone that limit the requisitions and applicant information to which a recruiter has access are not reflected in LinkedIn Recruiter with the LinkedIn Recruiter System Connect integration. After the 9 November 2018 patch release, constraints will be synced from Cornerstone to LinkedIn and will begin restricting the Cornerstone information that recruiters can see in LinkedIn Recruiter.

### Permission Constraints Use Case

John Smith is a recruiter at Acme Co. who is constrained to the Sales division, which means he cannot see requisitions in the Engineering Division or application information from candidates who applied to requisitions in the Engineering division. John has access to LinkedIn Recruiter. If Acme Co. enables the LinkedIn Recruiter System Connect integration before the 9 November 2018 patch release, then when John looks at LinkedIn Recruiter, he will be able to export candidates to open requisitions in Sales, as well as all other divisions. Additionally, if John views the LinkedIn profile of a candidate who applied to an Engineering position, he will be able to see which jobs the candidate applied to, as well as any status

information, notes, and interview feedback for those roles. After the 9 November 2018 patch release, John's constraints will be synced from Cornerstone to LinkedIn and will begin restricting the Cornerstone information that John can see in LinkedIn Recruiter. He will only be able to export candidates to requisitions in the Sales division, and he will only see Cornerstone application details for candidates who applied to Sales requisitions.

## Applicant Profile - LinkedIn Recruiter System Connect

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When LinkedIn Recruiter System Connect is enabled in the portal, a candidate's LinkedIn Recruiter data appears on the Applicant Profile page. You can view InMail history, notes, and the LinkedIn Recruiter profile.

A candidate's Cornerstone data is also available in LinkedIn Recruiter. For more information, [See \*\*LinkedIn Experience\*\*](#) on page 373 *for additional information*.

### InMail History

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A candidate's InMail history displays on the Emails tab. The date, sender, and subject are visible to all users with access to the Applicant Profile page in Cornerstone. InMail history will only be visible to users who have a LinkedIn Recruiter seat on the same contract.

Attachments are not included.

### Cornerstone Record Creation via InMail

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When a LinkedIn recruiter sends an InMail to a candidate, the candidate will be able to respond to the InMail, and in the process can choose to share their contact information with the recruiter. If a candidate chooses to share their contact information, that detail will be passed to Cornerstone.

If the candidate does not have an account in the portal, a new record will be created for the user. The record will not be connected to any specific requisition and can only be found through Candidate Search Query. **Note:** *If the **Applicant Opt Out** option in Requisition and Applicant Preferences is checked, then the new profile will not be visible in Candidate Search Query by default. The only way to find candidates generated through this InMail Stub Profile is to ensure **Applicant Opt-Out** is not checked.*

If the candidate **does** have an account in the portal, then the record will be updated with the contact information shared through LinkedIn.

### Notes

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Notes added on LinkedIn display on the Comments tab. These notes will be distinguished from Recruiting notes by displaying "via LinkedIn" next to the name of the user who submitted the note. Notes will only be visible to users who have a LinkedIn Recruiter seat on the same contract.

Notes that are created in LinkedIn Recruiter and viewed in your Cornerstone portal cannot be edited or deleted in Cornerstone.

### LinkedIn Recruiter Profile

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A candidate's LinkedIn profile will now be visible on a new "LinkedIn" tab on the Applicant Profile page. This tab is only available in portals that have enabled LinkedIn Recruiter System Connect. Users with a LinkedIn Recruiter seat will be able to see the full LinkedIn profile, including links to save the candidate to a project, send an InMail, or choose to be notified when the candidate updates their LinkedIn profile. Users without a LinkedIn Recruiter seat will see the candidate's public LinkedIn profile.

For candidates who do not have a LinkedIn profile, the tab will display "Candidate Not Matched."

The following images show what a LinkedIn profile looks like on the Applicant Profile > LinkedIn tab, depending on whether or not the recruiter is logged in and has a LinkedIn Recruiter Seat.

## LinkedIn Experience

With LinkedIn Recruiter System Connect, Cornerstone Recruiting data and actions can be viewed on the candidate's LinkedIn Recruiter page.


You can view Cornerstone data by clicking **In Cornerstone** in the candidate's details section on LinkedIn Recruiter. This opens a pop-up that displays their Cornerstone data. Much of the same candidate data that is visible in your Cornerstone portal will also be visible in LinkedIn Recruiter.

For example, you can view **status changes and dates** so that you know which jobs the candidate applied to, as well as their current and previous status(es) for those jobs. **Note:** *A candidate's application for a job is not visible until they are moved out of the New Submissions stage.*

You can view **comments from interviewers** and their **recommendation**. A candidate's score does not display.

**Comments** from recruiters and stakeholders will be visible in LinkedIn Recruiter so that you can use their input to make decisions about what actions to take. If attachments were included in the comment in Cornerstone, the attachment will not be visible in LinkedIn Recruiter.

You can also quickly and easily **get to your Cornerstone portal** to view the candidate on the Applicant Profile page by clicking the **View in Cornerstone** link.

 **SMB Project Manager - Chicago**  
Also applied to [2 older jobs](#)

**Catherine Silva**  
Project Manager at LinkedIn • Chicago, IL  
CSilva@gmail.com  
ATS id: 7c607b35-05db-add0-44b4-ed6a9116f90  
**Phone screen** November 15, 2016

[View in Cornerstone](#)

Interview feedback (4)  
**Austin James**  
November 15, 2016  
I really enjoyed speaking with Catherine. She really impressed me with her current work experience and examples as a Project Manager at LinkedIn.

[View all](#)

Notes (5)  
**Rebecca Morrison**  
October 15, 2016  
Catherine would be a good culture fit at our company. She has a very amicable personality where I could see her fit well in multiple roles. Would want to keep her as a warm contact...


[View all](#)

Information for candidates who have been archived, inactivated, or deleted will not display in LinkedIn Recruiter.

## Export Candidate

Candidates can be exported from LinkedIn Recruiter to jobs in Cornerstone. To export a candidate:

1. Navigate to their profile in LinkedIn Recruiter.
2. Select a job from the **Export to Cornerstone** drop-down. The jobs that display are the jobs to which you have access based on your permission constraints.
3. Click **EXPORT**.



## Catherine Silva

Project Manager at LinkedIn

Greater Chicago Area | Computer Software

2nd

Previous positions

Project Manager at Mintone

Project Manager at 44Elk

Education

Georgia Institute of Technology 2005 -2009

[Send InMail](#) [Add to clipboard](#)

Export to Cornerstone [Change ATS](#)

[Export](#)

**Note:** The **Change ATS** option (as it appears in the image above) is only visible for clients who have two or more LinkedIn Recruiter contracts.



## Frequently Asked Questions - LinkedIn Recruiter System Connect

### What is the difference between LinkedIn Recruiter and LinkedIn Recruiter System Connect?

LinkedIn Recruiter is the name of the recruiting application within LinkedIn. This application is purchased through LinkedIn and is necessary in order for LinkedIn Recruiter System Connect to be enabled in Cornerstone.

LinkedIn Recruiter System Connect is the name of the integration that can be enabled through Edge in Cornerstone.

### Where do I find Cornerstone candidate data in LinkedIn?

Cornerstone candidate data can be viewed in LinkedIn on the candidate's page in LinkedIn Recruiter.

### Can I turn off the integration after I enable it?

Yes. You can submit a request to LinkedIn (Itsatsintegrations@linkedin.com) to deactivate the integration.

### Will permissions and constraints be respected in LinkedIn?

Yes. Constraints will be synched so that users with LinkedIn Recruiter will only be able to see jobs and application information for requisitions they can access in Cornerstone.

### Can application data be deleted from LinkedIn?

Yes. Cornerstone will send deletion requests when triggered by the candidate or after the period of inactivity specified by a client.

### How are Notes and InMails from LinkedIn attributed to recruiters in Cornerstone?

When Notes and InMails are synced from LinkedIn, LinkedIn email address of the Note/InMail author is matched with the corresponding email address in Cornerstone. If multiple users in Cornerstone have the same email address, the first matching user (based on ascending user ID) will be labeled as the author of the Note/InMail in Cornerstone.

### If the LinkedIn profile displayed on the "LinkedIn" tab of the Applicant Profile page is incorrect, can the proper profile be mapped to the candidate?

Yes. A **Not the right candidate?** link will appear in the LinkedIn profile. Clicking this link will unlink the current LinkedIn profile. Afterwards, you can search for the correct LinkedIn profile and map the user to the selected profile.

When the profile is unlinked, any InMails and Notes from LinkedIn that are associated with the unlinked profile will be deleted from the candidate's record in Cornerstone. If the recruiter manually links a new LinkedIn profile to the candidate in Cornerstone, then all InMails and Notes from LinkedIn that are associated with the new profile will be synced to the candidate's record in Cornerstone.

**Note:** The process to sync all historical InMails and Notes for manually linked profiles will run once per day, so please allow up to 24 hours for the new information to appear in Cornerstone.

**Note:** *If multiple candidates are mapped to the same LinkedIn profile, then Notes and InMails from LinkedIn may not sync properly. When new Notes and InMails come in from LinkedIn, they will be assigned to the first matching candidate that is connected to this profile (based on ascending user ID).*

## Manage Candidates (Early Adopter) Configurable Columns

## Manage Candidates (Early Adopter) Configurable Columns Overview

---

With this enhancement, recruiters can now configure the columns on the Manage Candidates page to best suit their needs. This lets individual recruiters customize which columns display and the order in which they display.

In addition, as part of a post-release patch, you will be able to set your filter selections as default so that the Manage Candidates page is always filtered by the jobs, candidate statuses, and applicant flags you want to view.

**[Click here to download the Manage Candidates \(Early Adopter\) starter guide.](#)**

### [Use Case 1 - Configure Columns](#)

Sally is a recruiter. Sally is recruiting for a remote business development role and only uses one career site. Because the role is remote, she does not need to view:

- Source
- Location

She only wants to view the following columns and in this order:

- Candidates name
- Requisition
- Status
- Flags
- Type

By using the ability to configure columns on the Manage Candidates page, Sally can hide the Source and Location columns, as well as re-order the columns on the page. This allows her to be more effective in her role, as she can compare candidates quickly and easily.

### [Use Case 2 - Configure Columns](#)

Sally is a recruiter for ABC Company. Because ABC Company only uses one career site, Sally never needs to look at the Source column when comparing applicants. When she logs in to her portal, Sally only wants to see the following columns:

- Candidates name
- Requisition
- Status
- Flags
- Location
- Type

Because it is most important for her to view the candidate name, requisition, status, and flags, Sally wants to see those columns first and in the same order every time she logs in to her portal.

Sally is able to be most efficient with her time because she does not have to configure the Manage Candidates page every time she accesses it.

### [Use Case 3 - Set Default Filters](#)

Sally is a recruiter for ABC Company. Sally only focuses on 20 roles in technology. Because of that, Sally wants to set the default filter to show those 20 requisitions. Sally is then more efficient because she does not need to search for those 20 jobs every time she comes to the Manage Candidates page.

### [Is being an Early Adopter right for my organization?](#)

- We understand that not all planned Manage Candidate features are currently available in the Early Adopter program, but we are eager to start using the features that are available now.
- We do not need to configure which columns appear on the table and the column order to begin using the Manage Candidate experience. We understand that this is planned.

### Considerations and Exclusions

- The ability to configure columns via Cornerstone Mobile is not available. However, a user's default configuration and order of columns will reflect on the mobile device.
- Even if you hide a column on the Manage Candidates page, you will still be able to sort the page by that column.

### [Implementation](#)

These features are part of the Manage Candidates (Early Adopter) functionality, which is available to self-activate on the [Feature Activation Preferences](#) page.

Upon implementation of the October '18 release, the configurable columns feature is available for all portals that have self-activated Manage Candidates.

The ability to set default filters will be available in a post-release patch.

### [Security](#)

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	Recruiting

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.*

## Manage Candidates Page - Configure Columns

With this enhancement, a Customize Columns option is added to Manage Candidates. This option lets you dictate which columns display on the page and the order in which they display.

**Note:** *Manage Candidates is an Early Adopter functionality and must be self-enabled on the **Feature Activation Preferences** page.*

The screenshot shows the 'Candidates' management interface. At the top, there are five statistics: 82 Total Candidates, 1 Suggested Referral, 19 New Submissions, 16 Interviews, and 7 Offer Letters. Below these are buttons for 'Change Status' and 'View Resume', a 'Sort By' dropdown set to 'Submission Date (Newest)', and a search bar. A red arrow points to a gear icon next to the search bar, which is used to customize the columns. Below the search bar is a table of candidates.

CANDIDATE	LOCATION	REQUISITION	STATUS
<input type="checkbox"/> <b>Jersey Bowman</b> Internal 310-510-1114 tmoore@csod.com	United States	<b>Senior Accountant</b> req9	<b>Interview</b> 109 days ago <input type="button" value="Schedule"/>







To configure the columns:

1. Click the Customize Columns option . This opens the Customize Columns flyout.
2. Uncheck the box next to the columns you would like to hide.
  - A. Suggested Action - This option can only be configured if the box for the Status column is checked. If the Status column is unchecked, the Suggested Action box is disabled on the Customize Columns flyout, and suggested actions will not appear on Manage Candidates.
3. Click and drag columns into the order in which you would like them to appear.
  - A. Suggested Action - This option cannot be ordered separately from the Status column.
4. Check the **Save As Default** box to set this as your default view.
5. Click **SAVE**.

### Customize Columns

Select the columns you would like to see in the table.

Reset

	Location	<input checked="" type="checkbox"/>
	Requisition	<input checked="" type="checkbox"/>
	Status	<input type="checkbox"/>
	Suggested Action	<input type="checkbox"/>
	Type	<input type="checkbox"/>
	Source	<input type="checkbox"/>
	Flags	<input checked="" type="checkbox"/>

☐ Save As Default

CancelSave

Hidden columns will not appear for you on the page. Also, this only hides the columns for you and does not impact other users who view the page.

You can go back to viewing all columns on the page by clicking **Reset** at the top of the Customize Columns flyout.



## Manage Candidates Page - Set Default Filters

---

*This functionality will be available in a post-release patch.*

With this enhancement, you can now save your filter settings as default so that the Manage Candidates page is always filtered by the jobs, candidate statuses, and applicant flags you want to view. This is especially helpful when viewing large volumes of candidates across multiple jobs.

Filters Reset <

REQUISITION ^

☒ Show only open reqs

All Jobs 999+

My Jobs 36

☒ Sales Exe.. (REQ151) 12  
☒ Sales Rep.. (REQ150) 32  
☐ Marketer (REQ123) 22  
☐ Account.. (REQ412) 8  
☐ Sales Man.. (REQ368) 17

CANDIDATE STATUS ^

☒ Show only active candidates

☐ Background Check 32  
☐ First Interview 48  
☐ In Review 28  
☐ Invited to Apply 104  
☐ New Submissions 276  
☐ Offer 42  
☐ Second Interview 39

APPLICANT FLAGS ^

☐ ● Interviewed 23  
☐ ● A Must Hire 8  
☐ ● Sales 12  
☐ ● Gold Medalist 6  
☐ ● Senior 35

☒ Save As Default

Candidates

44 All Candidates

1 New Su

Batch Actions...

CANDIDATE ^

☐ **Caleb Poole**  
 (310) 456-1098  
[cpoole@gmail.com](mailto:cpoole@gmail.com)

☐ **Jessica Jones**  
 414-890-5354  
[jjones@csod.com](mailto:jjones@csod.com)

☐ **Kerry Washington**  
 (310) 456-1098  
[kwash@email.com](mailto:kwash@email.com)

☐ **George Freeman**  
 312-895-7656  
[gfreeman@email.com](mailto:gfreeman@email.com)

☐ **Betty White**  
 313-567-8172  
[bwhite@gmail.com](mailto:bwhite@gmail.com)

☐ **Michael Laughlin**  
 876-818-0998  
[mlaughter@email.com](mailto:mlaughter@email.com)

☐ **Cassie Wheeler**  
 871-763-8918  
[cwheeler@email.com](mailto:cwheeler@email.com)

☐ **Rebecca Lee**  
 987-113-7547  
[rlee@email.com](mailto:rlee@email.com)

Batch Actions...

To save your filter settings:

1. Select your desired filters in the Requisition, Candidate Status, and Applicant Flags sections.
2. Click **Save As Default** at the bottom of the Filters panel. A pop-up message appears at the top of the page to let you know that your selections were successful.

Your filter settings will remain even when you leave Manage Candidates and return or log out of your portal and log back in. This creates a more efficient experience when viewing and comparing candidates.

You can remove your default settings by clicking **Reset** at the top of the Filters panel. This returns the filters to their default system settings.

## Mobile-Friendly Career Sites - Support Google Analytics

---

This enhancement improves the usability of mobile-friendly career sites by allowing support for Google Analytics in advanced headers and footers.

As part of this project, Javascript is also supported in advanced headers and footers and will properly reflected in mobile-friendly career sites for portals that are configured to allow Javascript.

This enhancement is on by default for clients who have Google Analytics enabled in their portal. Support for Javascript is on by default for portals that are configured to allow Javascript.

## Offer Letter Emails: Update to Next Approver and Next Notification Only Approver Recipients

This enhancement eliminates the duplicate emails that were being sent to certain recipient types of the Offer Pending Approval email.

### Current Functionality

IF	AND	THEN
the recipient is "Next approver(s) if offer is pending"	at least one approver is configured on the offer letter as "Approver" and one approver is <b>configured on the offer letter as "Notification-Only Approver"</b>	the Offer Pending Approval email is sent to both the "Next approver(s) if offer is pending" recipient and the "Notification-Only Approver" recipient.
the recipient is "Next notification only approver(s) if offer is pending"		the Offer Pending Approval email is sent again to the "Notification-Only Approver" recipient.

### New Functionality

IF	AND	THEN
the recipient is "Next approver(s) if offer is pending"	there is at least one approver who is configured on the offer letter as "Approver"	the Offer Pending Approval email is only sent to the "Next approver(s) if offer is pending" recipient.

### Implementation

This functionality is automatically available for all organizations using Recruiting.

### Security

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offer: Edit Letter Content	Grants ability to access and manage the Offer Letter step when creating or editing a job requisition. Grants ability to edit the offer letter content and settings on the Applicant Profile page. To manage offer letter content on a job requisition, this permission must be used in conjunction with the <b>Requisition: Manage</b> permission. To manage offer letter content on the Applicant Profile page, this permission must be used	Recruiting

	in conjunction with the <b>Offer: Manage Offers</b> permission. This permission cannot be constrained.	
Offer: Manage Offers	<p>Grants ability to manage all functionality available in the Offer Letter Management table of an applicant's profile, as well as view offer letters on the Documents tab of the Applicant Profile page. This permission must be used in conjunction with the <b>Requisition: Manage</b> or <b>Requisition: Owner</b> permission. This permission cannot be constrained.</p> <p><b>Note:</b> Users must also be assigned the <b>Offer: Edit Letter Content</b> permission in order to edit offer letters that are generated from a template.</p> <p><b>Note:</b> Users must also be assigned the <b>Offer: Select Letter Template</b> to change the template that is used when generating offer letters.</p> <ul style="list-style-type: none"> <li>○ If an offer letter template is defined at the <a href="#">Requisition Level</a><sup>1</sup>, then users without the <b>Offer: Select Letter Template</b> permission can only use the template defined at the requisition level when configuring the offer letter at the <a href="#">Applicant Level</a><sup>2</sup>.</li> <li>○ If an offer letter template is not defined at the requisition level, then users must have the <b>Offer: Select Letter Template</b> permission in order to use a template at the applicant level.</li> </ul> <p><b>Note:</b> Users must also be assigned the <b>Applicants: Access Sensitive Statuses</b> permission to access offer letters that are defined as sensitive.</p>	Recruiting
Offer: Select Letter Template	Grants ability to select, edit, and modify the offer letter template that is used when generating an offer letter	Recruiting

<sup>1</sup>Requisition level refers to the job requisition in Manage Job Requisitions. Changes made to a job requisition are referred to as being made at the "requisition level." Applicant reviewers added to a job requisition after the requisition is created are referred to as being added at the "requisition level." An offer letter template added to a job requisition is referred to as being added at the "requisition level." This term applies to the Recruiting functionality. This is a Recruiting term.

<sup>2</sup>Applicant level refers to the applicant's profile. Changes made to an applicant's profile are referred to as being made at the "applicant level." Access granted to an applicant's profile is referred to as being granted at the "applicant level." This term applies to the Recruiting functionality. This is a Recruiting term.

	on the Applicant Profile page. This permission must be used in conjunction with the <b>Offer: Manage Offers</b> permission. Users that do not also have the <b>Offer: Manage Offers</b> permission cannot change the template used when generating offer letters. This permission can be constrained by OU and User's OU. Creator constraints apply.	
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	<p>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.</p> <p><b>Note:</b> 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 <b>Requisition: Manage</b> permission overrule those of the <b>Requisition: Owner</b> permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.</p>	Recruiting

## Optimize Mobile-Friendly Career Sites for Indexing by Search Engines

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## Optimize Mobile-Friendly Career Sites for Indexing by Search Engines Overview

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With this enhancement, jobs posted to mobile-friendly career sites can now show on Google Jobs and Indeed search engines. Options are added to the Career Site Settings page for mobile-friendly career sites so that administrators can enable the site to be indexed by search engines.

Candidates will be able to enter a search query on the search engines and find jobs that are posted to your mobile-friendly career sites.

This enhancement is part of Mobile-Friendly Candidate Experience. **[Click here to download the Mobile-Friendly Candidate Experience \(Early Adopter\) starter guide.](#)**

### How Does this Enhancement Benefit My Organization?

---

#### Maximizes Job Visibility

#### Creates More Avenues for Job Access

#### Drives Traffic to Your Jobs

When you allow search engines to index your career site, more candidates can find and apply to your jobs. They can use job search methods they are familiar with and see all of your available jobs that match their skills.

You can have a corporate logo right next to each job, which provides immediate recognition for your brand. This can also help candidates identify your jobs more quickly in the future.

#### [Use Case](#)

Jerry the Recruiter is posting a job via Cornerstone's Career Site tool. He needs candidates to be able to find the job via multiple search engines so that more people can apply for the position and Jerry can have a higher chance to find the right candidate.

### Frequently Asked Questions

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#### [How long will it take for my jobs to appear on search engines?](#)

For Google Jobs, jobs can take up to several weeks to appear. This is due to the crawling functionality that Google uses to pick up the jobs and the timing of the next crawl after your requisition is posted to the career site.

For Indeed, your jobs will be eligible to appear as long as their eligibility guidelines are followed. Their eligibility guidelines are available on their **[help page](#)** to ensure that your jobs are eligible to appear.

#### [Is this functionality a replacement for posting on job boards?](#)

No. Your jobs can still be posted to job boards. However, even if you post your jobs to job boards, you may still want them to appear on Google Jobs and Indeed because some job seekers will not visit the job boards.

#### [Which career sites are affected by this change?](#)

This enhancement only applies to mobile-friendly career sites. Standard career sites are not impacted.

#### [What happens if I do not define a career site logo for the search indexing?](#)

Google will attribute a default logo to the job post based on the first letter of your organization's name.

#### [How does Google Jobs work?](#)

Google Jobs works like any other search in Google. Candidates enter search terms in the Google search bar, and a Jobs section appears on the search results. Your jobs will appear in those results that are targeted by candidates.

### **Implementation**

This functionality is automatically available for all organizations using Recruiting, provided that you have self-enabled the Mobile-Friendly Candidate Experience. *See [Enable Mobile-Friendly Candidate Experience](#).*

### **Security**

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Corporate Preferences - Manage	Grants ability to manage Corporate Preferences, which includes several portal-wide settings. This is an administrator permission.	Core Administration

## Career Site - Settings

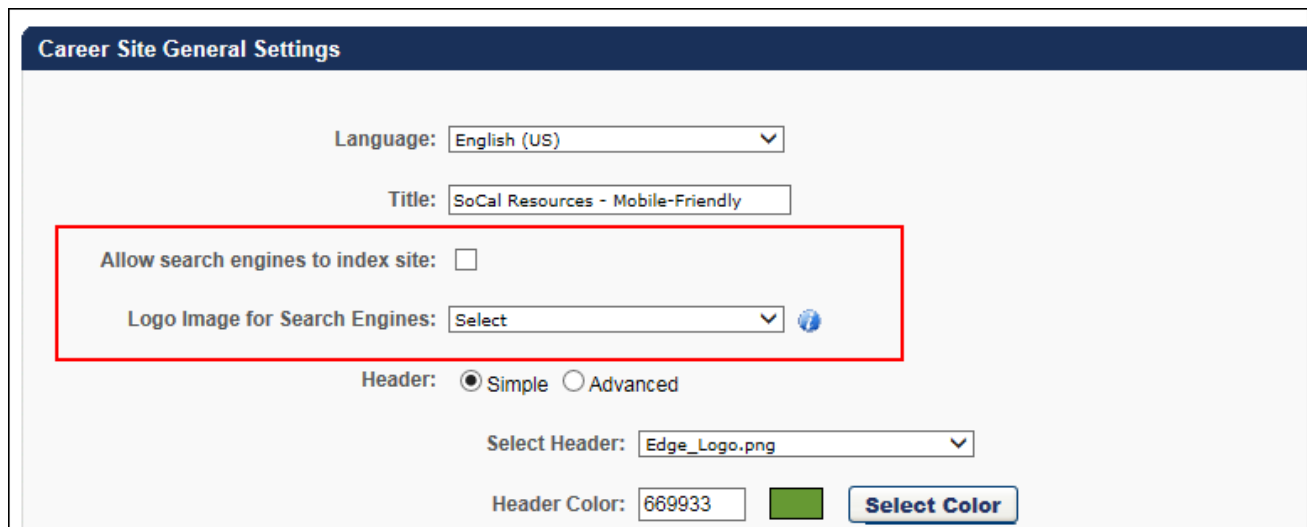
This enhancement adds options to the Career Site - Settings page that lets you enable the site to be indexed by search engines, including Google Jobs and Indeed. You can also select a logo for your jobs.

**Pre-Step Note:** *There must at least one image added to Corporate Preferences in order to select a logo for your jobs.*

To create a mobile-friendly career site, click the **Add Mobile-Friendly Career Site** option on the Career Site Management page.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Career Site - Manage	Grants ability to access and manage Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Career Site - View	Grants ability to access and view Career Site Management. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration



**Career Site General Settings**

Language: English (US)

Title: SoCal Resources - Mobile-Friendly

Allow search engines to index site: ☐

Logo Image for Search Engines: Select

Header: ☒ Simple ☐ Advanced

Select Header: Edge\_Logo.png

Header Color: 669933 Select Color

## Allow Search Engines to Index Site

This option lets you enable or disable the ability for search engines to index the site. This option is checked by default for newly created mobile-friendly career sites. The option is disabled by default for existing career sites that were created before implementation of this enhancement.

Check the box to enable search engine indexing. Jobs that are **posted to this career site via the Job Postings page** will be searchable on search engines.

When the option is unchecked, candidates will not be able to find the jobs that are posted to this career site on search engines.

#### [How long will it take for my jobs to appear on search engines?](#)

Jobs can take up to several weeks to appear on search engines. This is due to the crawling functionality that Google uses to pick up the jobs and the timing of the next crawl after your requisition is posted to the career site.

### Logo Image for Search Engines

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This option lets you dictate the logo that will appear next to each of your jobs that show up on search engines. This helps to create a brand look for your company's jobs on the sites.

To select a logo:

1. Click the drop-down to view the list of images. The images that display are the images that were configured in **Corporate Preferences**.
2. Select an image from the drop-down.

If you opt not to define a logo, Google will attribute a default logo to the job posting based on the first letter of your organization's name.

## Retirement of Apply with LinkedIn 1.0

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LinkedIn is sun-setting their current version of Apply with LinkedIn by the end of 2018. Clients who have a LinkedIn Recruiter contract, or a LinkedIn corporate account with active LinkedIn job slots, can leverage the new Apply with LinkedIn (With Apply Starters). The new Apply with LinkedIn (With Apply Starters) will only be supported on mobile friendly workflows.

*For more information, see **[Apply with LinkedIn \(With Apply Starters\)](#)**.*

## Retirement of Mobile Optimized Career Site Support

---

Following the October '18 Release, Cornerstone will remove the option "Enable Mobile Site" from the Standard Career Site. To create a mobile supported career site after the October '18 Release, clients will need to create a Mobile-Friendly Career Site on the Career Site Management page. Mobile optimized career sites created prior to the October '18 Release will be able to continue to be used, but Cornerstone will no longer support fixing defects for mobile optimized career sites and when copied, "Enable Mobile Site" will no longer be an option.

## Updates to Veteran's Preference Questions

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*This enhancement was released as part of the 28 September 2018 Patch Release.*

A new Veteran Status question is added to Compliance Enablement Preferences. In addition, this enhancement updates the text in the Veteran Status (Part 60-250) question.

### New Veteran Status Question

---

A new Veteran Status (VET-4212) question is added. The text of this question is identical to the text in the Veteran Status (Part 60-250) question. However, the response options are different.

The following options are available in the Response(s) drop-down:

- I identify with one or more of the categories of protected veteran described above
- I am not a protected veteran
- I choose not to self-identify

### Consideration for Require OFCCP Compliance Enablement

When the **Require OFCCP Compliance Enablement functionality** option is checked in Compliance Enablement Preferences, the Veteran Status (VET-4212) question will replace the Veteran Status (Part 60-250) question.

Upon implementation of this enhancement, applicant responses to the Veteran Status (Part 60-250) question will still display when the Veteran Status (VET-4212) question replaces the Veteran Status (Part 60-250) question. All previous answers to Veteran Status (Part 60-250) will still be accessible in the application tab.

### Deletion of Text

---

The following text is removed from the Veteran Status (Part 60-250) question:

- In the first paragraph, "by the Jobs for Veterans Act of 2002 (VEVRAA)" is removed.
- In the last paragraph, "Refusal to provide it will not subject you to any adverse treatment" is removed.

**Question Preview**

This employer is a Government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002 (VEVRAA) which requires Government contractors to take affirmative action to employ and advance in employment: (1) disabled veterans; (2) recently separated veterans; (3) active duty wartime or campaign badge veterans; and (4) Armed Forces service medal veterans. These classifications are defined as follows:

A "disabled veteran" is one of the following:

- A veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs; or
- A person who was discharged or released from active duty because of a service-connected disability.

A "recently separated veteran" means any veteran during the three-year period beginning on the date of such veteran's discharge or release from active duty in the U.S. military, ground, naval, or air service.

An "active duty wartime or campaign badge veteran" means a veteran who served on active duty in the U.S. military, ground, naval or air service during a war, or in a campaign or expedition for which a campaign badge has been authorized under the laws administered by the Department of Defense.

An "Armed forces service medal veteran" means a veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985.

Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. Refusal to provide it will not subject you to any adverse treatment. The information provided will be used only in ways that are not inconsistent with the VEVRAA, as amended.

Response(s):

Close



# View

---

## Org Chart - Hide Email and Phone Number

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## Org Chart - Hide Email and Phone Number Overview

*This enhancement was released as part of the 7 September 2018 Patch Release.*

With this enhancement, administrators can hide a user's email and phone number on the user card flyout on the org chart. This feature can be enabled or disabled in Org Chart Preferences.

### Implementation

This functionality is automatically enabled for all organizations using Cornerstone HR, View, or Succession.

### Security

The following existing permission applies to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Org Chart - Preferences	Grants access to the Org Chart Preferences page. This permission cannot be constrained.	Core
Org Chart - View	Grants access to the new Org Chart page for organizations with Cornerstone HR, Succession, or View. This permission can be constrained by OU, User's OU, Users, User's Self, User Self and Subordinates, User's Manager, User's Superiors, Employee Relationship, User's Direct Subordinates, User's Subordinates.	Core

## Org Chart Preferences

With this enhancement, a *Manage Fields Displayed in the User Details* section is added to Org Chart Preferences. This section includes fields that enable administrators to display or hide a user's email address and phone number on the user card flyout on the org chart. All options are enabled by default.

To access Org Chart Preferences, go to **ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES**.


### [Permissions](#)





PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Org Chart - Preferences	Grants access to the Org Chart Preferences page. This permission cannot be constrained.	Core


### Org Chart Preferences







#### Manage Fields Displayed in the User card

Add fields that can be displayed in the user card.  
**Note:** Organization attributes are displayed on both the medium and large card  
 User Attributes are only displayed on the Large card

**Add Organization Attributes:** Organizational Unit Type 

Field	Title	Type	Metric Type	Action
1	Position (Standard)	Organizational Unit Type		 
2	Location (Standard)	Organizational Unit Type		 

**Add User Attributes** Please Select 

Field	Title	Type	Metric Type	Action
1	Compa-Ratio	Compensation		 
2	Merit Increase	Compensation		 
3	Salary/Rate (current)	Compensation		 

#### Manage Fields Displayed in the User Details

☐ Display email address in the user details flyout


☐ Display phone number in the user details flyout

Add fields that can be displayed in the user details section.  
**Note:** A total of 15 fields can be added to the user details section. You can choose from user info and user ratings.

The following options are available in the *Manage Fields Displayed in the User Details* section:

- **Display email address in the user details flyout** - When checked, the user's email address displays in the user details flyout. When unchecked, this information is hidden.
- **Display phone number in the user details flyout** - When checked, the user's phone number displays in the user details flyout. When unchecked, this information is hidden.

The following shows the user details flyout on the Org Chart page with the email address and phone number hidden.



**William Brunner**  
EMEA  
Vice President, Sales

Original Hire Date:  
**5/21/2007**

Location:  
**London**

Country:  
**United Kingdom**

Grade:  
**N/A**


Performance Review Rating:  
**3.50**

Merit Increase:  
**N/A**

Done

PerformanceSuccessionCompensation

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**Curtis Simms**  
Central  
Vice President, Operations

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