



## Cornerstone May 2020 Release Notes

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# Release Notes for May 2020

## What's New for May '20

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.](#)
- **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 May '20 Release](#) on page 23 [for additional information.](#)
- **New Reporting Fields** - This topic provides a list of all reporting fields that are newly added with this release. [See New Report Fields for May '20 Release](#) on page 27 [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 for May '20 Release](#) on page 29 [for additional information.](#)
- **Past Releases** - This topic contains links to past release overviews. [See Past Release Notes.](#)

*Safe Harbor Statement: Any unreleased services or features referenced in this or other documents or public statements are not currently GENERALLY available and may not be delivered on time or at all. Customers who purchase Cornerstone OnDemand applications should make their purchase decisions based upon features that are currently available.*

The following new features and enhancements are available for the May '20 release:

### Careers Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<a href="#">Auto-Upgrade to Development Plans Redesign with the August 2020 Release</a>	Yes	Cornerstone's legacy Development Plan module is scheduled for deprecation with the August '20 Release. Once deprecated, access to legacy Development Plans will no longer be available in client portals and all clients remaining on the legacy Development Plans module will be automatically upgraded to the Development Plans redesigned module. The Development Plans redesign has a full set of preferences to configure the user experience by Organizational Unit. During the auto-upgrade all preferences set in legacy plans will populate in the new preferences.
<a href="#">Check-Ins - Follow-Ups</a>	Yes	With this enhancement, Check-Ins meeting participants can now use the meetings and topics page to create follow-up action items for a specific meeting.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Check-Ins - Home Page Customization</b>	Yes	With this enhancement, Check-Ins administrators can customize the look of the Check-Ins home page to accommodate an organization's brand and culture.
<b>Check-Ins - Individual Notes</b>	Yes	With this enhancement, the meetings and topics page now provides a place for individual notes for all participants in the meeting, ensuring that everyone's voice is heard. Individual notes can only be changed or deleted by the original writer and a View History link is available for all individual notes.
<b>Check-Ins Template – Checking in During Difficult Times</b>	Yes	<p>With this enhancement, Check-Ins provides a new "Checking in during difficult times" template. Organizations can use this template as a "best practices" guide to help build trust and facilitate effective one-on-one discussions during difficult circumstances.</p> <p><b>This feature is not available for UAT.</b></p>
<b>Reporting Fields - Check-Ins</b>	Yes	<p>With this enhancement, the fields available in the "Check-In Participant" field grouping are updated to be consistent with the fields available in the "Check-In Last Modified By" and "Check-In Creator" field groupings as follows:</p> <ul style="list-style-type: none"> <li>○ The Check-In Modifier alias is renamed to Check-In Last Modified By - This clarifies that the reported user will always be the last person who edited the Check-In. All other fields in this group remain unchanged.</li> <li>○ All User fields included in the Check-In Participant field grouping will be removed, except for User Full Name and User ID - This prevents unintended reporting on Check-In participants by someone other than the manager. With this change, the fields available in the "Check-In Participant" field grouping are consistent with the fields available in the "Check-In Last Modified By" and "Check-In Creator" field groupings.</li> </ul> <p><b>This enhancement was originally released with the April 3, 2020 patch.</b></p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Reporting Fields - Development Plans</b>	Yes	As released with the 6 March 2020 patch release, Development Plan exception reports are available.  <b>This functionality was released with the 6 March 2020 patch release.</b>

## Content Anytime Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Leadership and Management Subscription Refresh</b>	Yes	Create stronger managers across your organization with leadership and management training focused on motivating and engaging employees in the modern workplace. With this subscription teach managers how to rally their employees around a shared vision, make high stakes decisions in the moment, cultivate a positive, outcomes-oriented culture, and develop the systems needed to effectively manage team priorities.
<b>Modern Compliance Subscription Refresh</b>	Yes	Ensure compliance and minimize risk across your organization with content designed to target real behavior change and eliminate bias, harassment, injuries, data breaches, and more. With this subscription fulfill General HR Compliance legal requirements while helping employees recognize, examine, and address the behaviors that lead to breaches in safety, privacy, and ethics.
<b>Professional Skills Subscription Refresh</b>	Yes	Build stronger communicators, strategic thinkers, and higher functioning teams across the organization with professional skills content focused on the business savvy skills that every employee needs. With this subscription teach employees how to communicate effectively—both internally and with customers—work well in teams, stay productive, and manage their own career development.
<b>Remote Work Essentials Subscription</b>	Yes	The current crisis has dramatically shifted the way people work and the skills required to appropriately cope and manage remote teams. This new subscription provides content to help your employees adjust to working from home and manage their overall well-being. Topics include remote work best practices, communication tools, mental health, productivity, and leadership



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>ption (New)</b>		during times of change. The Remote Work Essentials subscription includes 730 courses in English, French, German, and Spanish.

## Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Banner Core Data Inbound Integration</b>	Available in Edge Marketplace	<p>Cornerstone integrates with the Ellucian Banner platform to provide a seamless process for creating and updating users and OUs in Cornerstone. Banner will remain the system of record for User and OU data. This API based integration provides an automated data sync to simplify data management and eliminate duplicate data entry.</p> <p><b>This functionality was released with the 6 March 2020 patch.</b></p>
<b>Bulk API (User &amp; OU)</b>	Available in Edge Marketplace	With this enhancement, a new Bulk API is available for user and organizational unit (OU) loads. Bulk APIs provide organizations the ability to leverage a highly scalable and resilient framework to create and update data in Cornerstone via APIs.
<b>Cornerstone Mobile App Removal from App Stores</b>		The Cornerstone Mobile app will be removed from the Apple App and Google Play stores on April 30, 2020. The app will be deprecated in August 2020 and will no longer function for users if opened following its deprecation in August.
<b>Data Exporter - Deprecation of XML Manifest With the October '20 Release &amp; Addition of JSON Manifest for Non-Core Objects</b>	Yes	With this release, Cornerstone is adding a JSON manifest for non-core objects in advance of the upcoming deprecation of the XML manifest in the October '20 Release. The XML manifest will be provided alongside the JSON manifest until the October '20 release, at which point the XML manifest will be deprecated for both core and non-core objects.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Data Exporter - Addition of NDJSON and JSON Output Formats</b>	Yes	With this enhancement, organizations that use Data Exporter now have the ability to request NDJSON and JSON as output options.
<b>Deprecation of Custom Reports with the February '21 Release</b>		Cornerstone will be deprecating the legacy reporting solution "Custom Reports" with the February '21 Release. With Reporting 2.0, users can execute the same business reporting operations as they've done in Custom Reports in addition to Reporting 2.0's rich suite of new features and functionality.
<b>Deprecation of Learning Loads on Data Load Wizard (DLW) With the February '21 Release</b>		Ability to perform learning data loads using Data Load Wizard will be deprecated with and end-of-life in the Feb 2021 Release. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.
<b>eCare Redirect to Support Central</b>	Yes	In Q1 of 2019, Cornerstone <b>introduced Support Central</b> , which provides both an information resource as well as case management. With the May '20 Release, we will be updating the eCare link to Support Central. Please follow <b>these instructions</b> to access Support Central.
<b>Edge Import - Learning Loads (Early Adopter)</b>	Yes	<p>With the 6 March 2020 patch release, Edge Import is available to organizations as an Early Adopter for loading Learning Management System (LMS) historical data.</p> <p>The following functionality is new with the May'20 Release:</p> <ul style="list-style-type: none"> <li>○ Validation Updates</li> <li>○ Capacity Control (available post-release)</li> </ul> <p><b>Edge Import Learning Loads were released with the 6 March 2020 patch.</b></p>
<b>jQuery Library Upgrade</b>	Yes	With this release, Stage and Pilot environments are being auto-upgraded from jQuery 1.7 to jQuery 3.4. This auto-upgrade will occur in Production environments with the August 2020 release, allowing organizations three additional months to prepare.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		If an organization is ready to self-upgrade prior to August, they have the option to do so in Production. A toggle will be available on the jQuery Validation Tool page with the May 2020 Release.
<b>Kronos Workforce Ready Core Data Inbound Integration</b>	Available in Edge Marketplace	<p>Cornerstone integrates with Kronos Workforce Ready (WFR) to provide a seamless process for creating and updating users and OUs in Cornerstone. This is achieved through an automated data sync which simplifies data management and eliminates redundant work. With this integration, Kronos WFR remains the system of record for user and OU data.</p> <p><b>This integration was released with the 6 March 2020 patch. Support for custom fields was added with the 3 April 2020 patch.</b></p>
<b>May '20 Language Pack Updates</b>	Yes	<p>New updates to Cornerstone Language Packs are available with the May '20 Release. Please visit the <b>May '20 Language Pack Updates posting</b> in the Success Center to review the full list of changes.</p> <p>Please also visit the <b>March 6, 2020 Patch Localization Update</b> posting in the Success Center to review translation updates to Check-Ins, as well as other updates related to Arabic, French (France), German, Portuguese (Brazil), Bahasa (Malaysia), and Hebrew that were delivered in the March 6 patch.</p>
<b>New "Copy Down Scheduled" Email Trigger</b>	Yes	<p>With this enhancement, a new "Copy Down Scheduled" email trigger is now available. When enabled, this email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.</p> <p><b>This functionality is not available at the start of UAT.</b></p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Real-Time Data Warehouse (RTDW) Optimizations</b>	Yes	<p>With this enhancement, two optimizations improve performance in the Real-Time Data Warehouse (RTDW).</p> <ul style="list-style-type: none"> <li>○ Optimize Learning Object "transcript_curricula" - <b>This functionality will be released in a post-release patch. It is not available during UAT.</b></li> <li>○ Optimize Cornerstone HR Object "forms2-submissions" - <b>This functionality will be released with the 5 June 2020 post-release patch.</b></li> </ul>
<b>Reporting 2.0 - Calculated Fields</b>	Yes, in a post-release patch	As part of a post release patch for the May '20 release, calculated fields can be created in Reporting 2.0. The calculated fields user interface (UI) in Reporting 2.0 offers a cleaner, simplified look. Additional calculation functions have been added, and every function includes use examples.
<b>Reporting 2.0 - General Availability</b>	Yes	<p>With the May '20 release, Reporting 2.0 is Generally Available (GA). Clients no longer need to self-enable Reporting 2.0 in their portals as it will be on by default, making it easier to take advantage of all the functionality that Reporting 2.0 provides.</p> <p>Auto-enablement only applies to portals that have not enabled Reporting 2.0. Portals that have already enabled Reporting 2.0 should not be impacted by the auto-enablement.</p>
<b>Reporting 2.0 - Usability Enhancements</b>	Yes	<p>Reporting 2.0 usability enhancements were released as part of the 6 March 2020 Patch Release and the 3 April 2020 Patch Release:</p> <ul style="list-style-type: none"> <li>○ Custom Reports Migration Enhancements</li> <li>○ Load Times Reduced</li> <li>○ Report Viewer Filter Expanded by Default</li> </ul>
<b>RTDW Updates to Reporting API, RDW, and Data Exporter</b>	Yes	Impacting only clients using Reporting API, Replicated Data Warehouse (RDW), and Data Exporter, the Real-Time Data Warehouse (RTDW) categories may be impacted, deprecated, or break applications, scripts, or functionalities that are based on earlier versions of RTDW objects.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<p>Documentation that describes RTDW views and fields used in Custom Reports are updated and available in the <a href="#">RTDW Documentation for Reporting API, RDW, and Data Exporter Community</a>. Join and follow the community to be notified of new posts.</p> <p><b>This functionality was available in Stage portals as of 21 April 2020.</b></p>
<b>STS Authentication End-of-Life to Occur with the February '21 Release</b>		<p>Cornerstone's custom authentication framework, Session Token Service (STS), was deprecated in February 2020 and will be fully retired and unavailable in February 2021. During the deprecation phase, Cornerstone will no longer support STS. The STS endpoint will still be available during the deprecation phase, but Cornerstone will no longer address any defects or enhance this endpoint. Any requests to the endpoint will fail starting February 2021, when STS is fully retired.</p> <p>Organizations will need to modify their code for existing integrations that use Cornerstone's API and switch to OAuth 2.0 from STS by February 2021.</p>
<b>Workday Core Data Inbound Integration Enhancement</b>	Yes	<p>With this enhancement, the Workday Core Data Inbound Integration now includes a validation check on the Settings page when configuring the integration in Edge. The administrator is alerted if the value entered for any of the fields below is invalid:</p> <ul style="list-style-type: none"> <li>○ Workday Tenant URL</li> <li>○ Integration System User Username</li> <li>○ Integration System User Password</li> </ul>

## Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Point-in-Time Export: Add</b>	Yes	<p>Ten new fields have been added to the Point-In-Time Headcount report. These new fields will automatically appear in the Point-In-Time Headcount export:</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Additional Fields</b>		<ul style="list-style-type: none"> <li>○ Original Hire Date</li> <li>○ User Status</li> <li>○ Last Hire Date</li> <li>○ Activation Date</li> <li>○ Deactivation Date</li> <li>○ Time Zone</li> <li>○ Allow Reconciliation</li> <li>○ Required (Training) Approvals</li> <li>○ Display Language</li> <li>○ Is Rehired Employee</li> </ul> <p>This functionality was available with the 6 March 2020 patch.</p>
<b>Secure User Custom Fields</b>	Yes to CHR clients only.	With this release, newly created short text, scrolling text, date, and numeric user custom fields can be configured as secure fields, by using a new “Secure” checkbox on the Custom Field Administration page. Secure custom fields will function like Sensitive Personally Identifiable Information (SPII) fields and can be maintained and viewed if the administrator’s IP is part of the IP whitelist.

## Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Back-end Optimizations to Learning Searches</b>		Beginning in Q2 of 2020, Cornerstone will begin backend optimizations to improve Learning searches. No changes to Learning search features should be observed by administrators or end users. Search queries and results are expected to match the existing experience.
<b>Cornerstone Learn - Background Processing for Course Downloads (iOS)</b>	App update required	With this enhancement, when downloading training in the iOS version of the Cornerstone Learn app, learners can put the Learn app in the background of their device and the download will continue processing until complete. <b>Note:</b> This functionality was already available for the Android version of the app.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Cornerstone Learn - Device Registration</b>	App update required	<p>With the March 20, 2020 patch, iOS users can register mobile devices and generate a device key as an alternative authentication method for logging into the Learn app.</p> <p>A <b>Forget Me</b> link has also been added to the App Settings page, allowing users to de-register their account from their mobile device.</p>
<b>Cornerstone Learn - Offline Course Deletion for Android</b>	App update required	<p>With this enhancement, learners using the Cornerstone Learn app offline can delete previously downloaded courses. This enhancement was made available for iOS on December 6 2019, and will be available for Android with the February 2020 release.</p>
<b>Cornerstone Learn - Playlists</b>	App update required	<p>With this enhancement, users of the Cornerstone Learn app can interact with playlists in the following ways:</p> <ul style="list-style-type: none"> <li>○ Search for and filter by playlists via Learning Search</li> <li>○ Follow playlists</li> <li>○ Access playlists via a new carousel on Learner Home in the app</li> <li>○ Consume training within playlists</li> <li>○ Launch external content from within playlists in the app</li> <li>○ View playlist metrics</li> <li>○ Share playlists with other users</li> </ul> <p><b>These enhancements will be made available for both the Android version and the iOS version of the Cornerstone Learn app with the May release. These enhancements are not available during UAT.</b></p>
<b>Cornerstone Learn - Training Description Enhancements</b>	App update required	<p>With this enhancement, the following updates have been made to the Cornerstone Learn app:</p> <ul style="list-style-type: none"> <li>○ A Description section has been added to the Training Details page</li> <li>○ The full training description displays for training items on the Training Details page</li> <li>○ HTML, such as formatted text, links, images, and more display in the training description</li> </ul>



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>The training description on the approvals list will display four lines of plain text</li> </ul> <p><b>This enhancement is not available during UAT.</b></p>
<b>Cornerstone Learn - Training Image Displayed for Training Approvals</b>	App update required	With this enhancement, if a thumbnail image does not exist in the Course Catalog for a training item, the image set via Default Training Image Preferences for the training type will be used as the thumbnail image for the training item on the Cornerstone Learn Approvals tab instead of a stock image. If the user taps the thumbnail image for a training item, they are navigated to the Training Details page for the training.
<b>Cornerstone Learn - Training Push Notifications</b>	Yes	<p>With this enhancement, five training push notifications have been enabled for both the Android and iOS versions of the Cornerstone Learn app, along with deeplinking capabilities which take the user to the relevant application area upon tapping the notification banner. The following push notifications are included in this enhancement:</p> <ul style="list-style-type: none"> <li>Training is Assigned</li> <li>Training is Due</li> <li>Training is Approved</li> <li>Training is Denied</li> <li>Training is Requested (<b>Note:</b> <i>This push notification is sent to the training approver for training that has been requested and requires approval.</i>)</li> </ul> <p><b>This enhancement is not available during UAT.</b></p>
<b>Cornerstone Learn - Supported Devices</b>		Cornerstone supports the native mobile application in the three most recent versions of Android and the two most recent versions of iOS. In order to use the Cornerstone Learn app for the portal, administrators users' devices must use one of the three most recent versions of Android or one of the two most recent versions of iOS.
<b>Curriculum Versioning Enhancements Auto-</b>		With the February 2020 release, numerous curriculum versioning enhancements were made available via self-activation in Production portals.



FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Upgraded with the October '20 Release</b>		With the October 2020 release, all portals that have not manually activated these curriculum versioning enhancements will be auto-upgraded. It is strongly recommended that your organization test these enhancements in Stage prior to manual activation or the auto-upgrade in October 2020.
<b>Delete Courses in Create Tool</b>	Yes	<p>With this enhancement, users with access to the Create Tool can delete courses they have created and courses created by others users at their organization within the Create Tool. When a Create Tool course is deleted, the course is removed from the Create Tool and is no longer available. Upon deletion, courses published to the Learning Management System (LMS) are immediately marked as Inactive. Users who have the deleted course on their transcript can no longer access the course once it has been deleted from the Create Tool and made inactive.</p> <p>This enhancement is not available during UAT.</p>
<b>Deprecation of Legacy Learning Details Page with the October '20 Release</b>		<p>In 2019, a redesigned Learning Details page was made available as an Early Adopter project, and has continued to evolve toward feature parity with the legacy version of the Learning Details page. With the October 2020 release, the legacy version of the Learning Details page, previously referred to as "Training Details" or "LO Details," will be deprecated for training types which are supported by the redesigned Learning Details page, including:</p> <ul style="list-style-type: none"> <li>○ Curricula</li> <li>○ External Content</li> <li>○ Materials</li> <li>○ Online Courses</li> <li>○ Tests</li> <li>○ Videos</li> <li>○ Events &amp; Sessions</li> </ul> <p>During the August 2020 release, administrators can opt out of using the new page in their learning portals and continue to use the legacy page, but with the October 2020 release, this option will be removed and all portals will be automatically upgraded to the new Learning Details page for all supported training types.</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Deprecation of the Proxy Enrollment API with the February '21 Release</b>		Cornerstone's legacy Proxy Enrollment API, available as part of Cornerstone API, is scheduled for deprecation. It is being replaced by the new Learning Assignment API. The Proxy Enrollment API end-of-life is targeted to occur with the Feb 2021 Release.
<b>ILT Session Becomes Available Email - Calendar Option</b>	Yes	With this enhancement, via the Email Management page, calendar options can be configured for ILT Session. Becomes Available emails, allowing instructors to add the calendar invitation for the session directly to their calendar.
<b>Learner Home-Subjects Banner Toggle</b>	Yes	<p>On the Learner Home page, a Subjects banner displays to users, prompting them to add subjects they are interested in so Learner Home can recommend relevant training to them in the future. The Subjects banner displays over any custom banners configured for the Learner Home page, and prior to this enhancement, the Subjects banner continued to display over the custom banners until the user either added subjects or dismissed the Subjects banner using the X icon.</p> <p>As of the March 6, 2020 patch, administrators can deactivate the Subjects banner by division via the Learner Home Preferences page. The Subjects banner will be enabled by default, but if the banner is deactivated by an administrator, it will no longer display on the Learner Home page for users within the selected divisions. If an administrator later enables the Subjects banner again, it will display to users unless the user has already dismissed the banner or added subjects.</p>
<b>Learning Details Redesign (Early Adopter) Enhancements</b>	Yes	<p>In 2019, a redesigned Learning Details page was released as an Early Adopter enhancement. With the May 2020 release, the Learning Details page is still in an Early Adopter status, and the following additional enhancements have been made to this feature:</p> <ul style="list-style-type: none"> <li>○ Display Currently Registered/Max Available Space (released with the March 6 patch)</li> </ul>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		<ul style="list-style-type: none"> <li>○ Display Locator Number and Year (released with the March 6 patch) - <b>Note:</b> <i>The visibility of the Locator Number is dependent on an ILT Preferences setting, which controls Session ID and Locator Number visibility.</i></li> <li>○ Strikethrough Logic for Pricing (released with the April 3 patch)</li> <li>○ Learning Details Preferences (Targeted for the June 5 patch)               <ul style="list-style-type: none"> <li>○ Ability to control data display</li> <li>○ Page enablement (existing functionality)</li> </ul> </li> <li>○ One Waitlist Per Person Per Event</li> <li>○ Improved Workflow for prework, postwork, and prerequisites</li> <li>○ <b>View Prerequisites</b> primary action improved (targeted for a post-release patch)</li> <li>○ Enhanced Visual Design (targeted for a post-release patch)</li> <li>○ Enhanced Curriculum Contents (targeted for a post-release patch)</li> </ul>
<b>Localizing the Create Tool</b>	Yes	<p>Prior to this enhancement, the Create Tool was only available in English (US).</p> <p>With this enhancement, the Create Tool displays to users in their own display language if the user's display language is one of the following supported languages:</p> <ul style="list-style-type: none"> <li>○ French</li> <li>○ German</li> <li>○ Spanish</li> <li>○ Italian</li> <li>○ Dutch</li> <li>○ Chinese (Traditional)</li> <li>○ Chinese (Simplified)</li> <li>○ Japanese</li> </ul>
<b>Machine Learning Preferences Enablement on</b>	Yes	<p>Prior to this enhancement, the Machine Learning Preferences page was not available for secure swimlane organizations due to security concerns.</p> <p>As of the March 6, 2020 patch, a limited version of the Machine Learning Preferences page is now enabled for CDG4</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>CDG4 Swimlane</b>		organizations. Of the two existing options on the Machine Learning Preferences page, including <b>Content Filtering</b> and <b>Cross-Portal Content Recommendations</b> , only the <b>Content Filtering</b> option is available for CDG4 organizations. The <b>Cross-Portal Content Recommendations</b> option remains permanently disabled and unavailable to CDG4 organizations due to security concerns.
<b>New Email Tag - Link to Instructor Request Page</b>	Yes	With this enhancement, a new INSTRUCTOR.REQUEST.LINK email tag is available for Request Instructor emails. This tag displays as a link in the email which navigates the instructor to the request page for the specific session, allowing the instructor to quickly respond. This tag is SSO-enabled but is also usable by organizations not using SSO.
<b>New Email Tag - Withdraw from Session</b>	Yes	With this enhancement, a new WITHDRAW.SESSION.LINK email tag is available for ILT Session Register emails. The WITHDRAW.SESSION.LINK tag is SSO enabled but is also available for non-sso enabled portals. This tag displays as a link in the email, and if the user clicks the link, they are navigated to the Cancel Registration page of the selected event. The learner then only needs to select a reason for their withdrawal. This new tag allows administrators to save their users time and deliver a better ILT user experience.
<b>Reporting Fields - Learning</b>	Yes	With the May 2020 release, the following enhancements have been made to Learning reporting: <ul style="list-style-type: none"> <li>○ New certification fields are available in Reporting 2.0 (released with the March 6 patch)</li> <li>○ New <b>Archived from Transcript? (Curriculum)</b> field is available in Reporting 2.0 (released with the March 6 patch)</li> <li>○ A <b>Past Due Aging</b> filter is available in learning reports that utilize this field</li> <li>○ The <b>Completed SCOs %</b> field has been renamed as <b>Course Progress %</b></li> </ul>
<b>Set an End Date for Dynamic</b>	Yes	With this enhancement, during the creation process, administrators can configure an end date for a dynamic learning assignment. After the dynamic learning assignment is

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Assignments</b>		submitted, it will process according to the specified frequency until the end date is reached. When the assignment reaches its end date, it stops processing automatically and will not process again.
<b>"Subscriptions" Field Added to the Course Catalog and Course Console</b>	Yes	<p>Cornerstone's Content Delivery connectors enable a seamless integration between content providers and Cornerstone's learning management system (LMS). Using Content Delivery connectors, courses are automatically streamlined to the Course Catalog.</p> <p>In February 2020, Cornerstone upgraded Content Anytime to utilize Content Delivery connectors with automated synchronization technology. In addition, both the Coursera for Business and edX for Business integrations use Content Delivery connectors.</p> <p>In the Course Catalog and Course Console, each content integration is represented by a subscription, which is a collection of courses bundled for a specific provider or mutual content purpose.</p> <p>With the May 2020 release, the following enhancements have been made:</p> <ul style="list-style-type: none"> <li>○ A new <b>Subscriptions</b> field displays for training in the Course Catalog and in Course Console for learning administrators</li> <li>○ When a user launches an AICC, SCORM, or Online Content course, the content source is visible</li> </ul>
<b>Training Launch Enhancements</b>	Yes	<p>With this enhancement, when a learner views training from any browsing page and the training does not require approval, the <b>Launch</b> option will display as the primary action available for the training. If approval is required for a training item, the user will see the <b>Request</b> option, but then after the training is approved, the <b>Launch</b> option will be the next available action. Removing the <b>Register</b> option from the training access workflow helps users obtain training faster and more efficiently. In addition, when a learner launches training from any page, the page from which they accessed the training does NOT redirect to the learning transcript. The page from which the</p>

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		user accessed the training remains open, allowing them to continue browsing training without interruption.
<b>"Waitlist Expired" and "Exempt" Statuses Will Not Increase Event Regnum</b>	Yes	With this enhancement, if a user is in a Waitlist Expired or an Exempt status for a session, the registration number of the event will NOT increase, provided there is no further user action required for the event, and the user will not be prompted to retake another session of the same event.

## Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Currencies Redesign</b>	Yes	With this enhancement, the new Manage Currency Types page provides administrators with a single point-of-access to manage currency types for your organization.
<b>Matrixed Co-Planners in Succession Tasks</b>	Yes	With this enhancement, the administrator or the assessor can delegate a co-planner to specific assessee's within Employee Relationship and Assessor tasks, which provides flexibility and control when involving co-planners.
<b>Reporting Fields - Performance Reviews</b>	Yes	As released with the 6 March 2020 patch release, Performance Review exception reports are available. <b>This functionality was released with the 6 March 2020 patch release.</b>

## Recruiting Features

FEATURE NAME	FEATURE	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>Candidate Messaging &amp; SMS (Pilot)</b>		Available to Pilot Program	The Candidate Messaging feature allows recruiters to converse with candidates directly inside Cornerstone Recruiting through an instant messaging-style interface. Candidates will be notified

FEATURE NAME	FEATURE	AUTOMATICALLY ENABLED?	DESCRIPTION
		Participants Only	of unread messages via email and SMS (where available and possible) and can respond directly to recruiters using a link in the notification.
<b>Deprecation of Manage Applicants with the February '21 Release</b>		Yes	<p>With the May '20 release, in Stage environments, when the Applicants count is selected from all applicable pages, which includes Manage Requisitions, Hiring Dashboard, and Review Applicants, users will be redirected to a filtered view of the <b>Manage Candidates</b> page specific to the relevant requisition instead of Manage Applicants.</p> <p>With the February '21 release:</p> <ul style="list-style-type: none"> <li>○ The Manage Applicants page will be deprecated and will be removed in all environments.</li> <li>○ The redirects to Manage Candidates instead of Manage Applicants will be automatically enabled in Production and Pilot environments.</li> <li>○ Defects related to Manage Applicants will no longer be supported.</li> </ul>
<b>Deprecation of Suggested Referrals and New Submissions Pages with the August '20 Release</b>		Yes	<p>With the May '20 release, along with the <b>auto-enablement of Manage Candidates</b> in Production and Pilot environments, when New Submissions or Suggested Referrals are selected from the Manage Requisition, Hiring Dashboard, Recruiting Dashboard, or Recruiting Manager Dashboard pages, users will be redirected to a filtered view of the Manage Candidates page instead of the New Submissions or Suggested Referrals pages. Support for defects related to the Suggested Referrals and New Submission pages will also stop at this time. This redirect is already available today in Stage portals.</p> <p>With the August '20 release, the deprecation will be complete with the removal of the New Submissions and Suggested Referrals pages in all environments.</p>
<b>Hiring Manager Experienc</b>		Yes	With the May '20 release, the following enhancements are made to the Request Candidate Feedback functionality:



FEATURE NAME	FEATURE	AUTOMATICALLY ENABLED?	DESCRIPTION
<b>e - Request Candidate Feedback Enhancements</b>			<ul style="list-style-type: none"> <li>○ A Welcome Page is added</li> <li>○ A user's name and Position Organizational Unit (OU) now displays in search results when looking for users to add to a feedback request</li> <li>○ The feedback user interface (UI) is optimized (available at a later date during UAT)</li> </ul>
<b>Manage Candidates Auto-Enabled in Production</b>		Yes	With the May '20 release, Manage Candidates will be auto-enabled in Production and Pilot environments. The option to enable via <b>Feature Activation Preferences</b> will also be removed as it will no longer be needed. Manage Candidates was previously auto-enabled in Stage environments with the February '20 Release.
<b>pymetrics Talent Management and Screening Integration</b>		Available in Edge Marketplace	<p>The pymetrics Talent Management and Screening integration helps organizations make well-informed hiring decisions—all within the convenience and seamlessness of the Cornerstone recruitment and talent management system you already use. The assessments use data science to predict a candidate's job fit and future performance, rather than only focusing on the skills a candidate has already attained based on their resume.</p> <p>pymetrics assessments can be included in the application workflow and can also be sent manually by the recruiter outside of the job application.</p> <p><b>This functionality was released with the 6 March 2020 patch release.</b></p>
Simplified Recruiting Experience in Manage Candidates	<b>Assign Forms</b>	Yes	<p>As part of the 6 March 2020 patch release, the ability to assign forms in Manage Candidates was released to Stage portals.</p> <p>As part of the May '20 release, this functionality is now available in Production and Pilot portals.</p>
	<b>Assign Integrations</b>	Yes	<p>Integrations can now be assigned to candidates on Manage Candidates.</p> <p><b>This functionality was released to Stage portals as part of the 21 February 2020 patch release and to</b></p>



FEATURE NAME	FEATURE	AUTOMATICALLY ENABLED?	DESCRIPTION
			<b>Production and Pilot portals as part of the 6 March 2020 patch release.</b>
	<b>Invite to Events</b>	Yes	<p>As part of the 6 March 2020 patch release, the ability to invite candidates to events in Manage Candidates was released to Stage portals.</p> <p>As part of the May '20 release, this functionality is now available in Production and Pilot portals.</p>
	<b>Manage Flags in Applicant Carousel</b>	Yes	With this enhancement, you can now manage flags for one candidate at a time on the applicant carousel.
	<b>New Submissions</b>	Yes	<p>As part of the February '20 release, when clicking the link in the New Submissions column on the Manage Requisitions page in Stage portals, recruiters were redirected to a filtered view of Manage Candidates that showed only the suggested referrals or new submissions from the selected requisition.</p> <p>As part of the May '20 release, the redirect to Manage Candidates is now released to Production and Pilot portals.</p>
	<b>Request Reference Letters</b>	Yes	<p>As part of the 3 April 2020 patch release, the ability to <b>request reference letters</b> was released to Stage portals.</p> <p>As part of the May '20 release, this functionality is now available in Production and Pilot portals.</p>
	<b>Suggested Referrals</b>	Yes	As part of the February '20 release, when clicking the link in the Referrals column on the Manage Requisitions page in Stage portals, recruiters were redirected to a filtered view of Manage Candidates that showed only the suggested referrals or new submissions from the selected requisition.

FEATURE NAME	FEATURE	AUTOMATICALLY ENABLED?	DESCRIPTION
			As part of the May '20 release, the redirect to Manage Candidates is now released to Production and Pilot portals.
<b>Tag Support on Thank You Step</b>		Yes	With this enhancement, USER.GUID and JOB.REQUISITION.ID tags can be added to custom Thank You pages on application workflows so that recruiters can use the data gathered from the tracking pixel to connect hired candidates to the data that is tracked.

# New and Enhanced Permissions for May '20 Release

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

## New Permissions

The following permissions are new for the May '20 release:

### Cornerstone HR

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - Edit Secure User Custom Fields - Unmasked	Grants the ability to edit secure user custom field info unmasked. This permission can be constrained by OU, Restrict to User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - Manage Secure User Custom Fields	Grants the ability to manage the setting secure user custom fields. This permission can be restrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Masked	Grants the ability to view secure user custom field info masked. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Unmasked	Grants the ability to view secure user custom field info unmasked. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration

### Edge

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Bulk API History	Grants access to the Bulk API History page, which displays all the loads that have been performed using the Bulk API. Administrators can select a load to view additional details of the load, including the results. This permission cannot be constrained. This is an administrator permission.	Edge
Access Edge Bulk API	Grants ability to access and utilize the Bulk API. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Cost Center OU	Grants ability to use the Bulk API to load cost center organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Custom OU	Grants ability to use the Bulk API to load custom organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Division OU	Grants ability to use the Bulk API to load division organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Employee	Grants ability to use the Bulk API to load employee data. This permission cannot be constrained. This is an administrator permission.	Edge

	This permission is only available when the Bulk API is enabled via Edge Marketplace.	
Bulk API - Grade OU	Grants ability to use the Bulk API to load grade organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Legal Entity OU	Grants ability to use the Bulk API to load legal entity organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Location OU	Grants ability to use the Bulk API to load location organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Position OU	Grants ability to use the Bulk API to load position organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge

## Reporting

**Permission Availability Note:** The Calculated Fields functionality will be available in a post-release patch for the May '20 release.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Manage Global Calculated Fields	Grants the ability to publish calculated fields to all users. This permission cannot be constrained.  <b>Note:</b> Calculated fields can be created by all users who have permission to create reports in Reporting	Reporting

*2.0. However, in order to publish the calculated field globally, a user needs permission to manage global calculated fields.*

## Enhanced Permissions

The following existing permissions are enhanced for the May '20 release.

### Performance

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Currencies 2.0 - Edit	Grants the ability to customize the Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all currency pages, fly outs , and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - Manage	Grants the ability to activate/deactivate currencies, change the Corporate Currency, customize Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all Currency pages, fly outs , and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - View	Grants the ability to view all currency pages, fly outs, and Rate History.	Compensation - Administration

## New Report Fields for May '20 Release

This page provides the master list of new report fields for the May '20 release.

### Careers

*This enhancement was originally released with the April 3, 2020 patch.*

For Check-Ins, the fields available in the "Check-In Participant" field grouping are updated to be consistent with the fields available in the "Check-In Last Modified By" and "Check-In Creator" field groupings as follows:

- The Check-In Modifier alias is renamed to Check-In Last Modified By - This clarifies that the reported user will always be the last person who edited the Check-In. All other fields in this group remain unchanged.
- All User fields included in the Check-In Participant field grouping will be removed, except for User Full Name and User ID - This prevents unintended reporting on Check-In participants by someone other than the manager. With this change, the fields available in the "Check-In Participant" field grouping are consistent with the fields available in the "Check-In Last Modified By" and "Check-In Creator" field groupings

### Learning

FIELD NAME	SECTION	CUSTOM REPORT NAME	APPLICABLE TO REPORTING 2.0?
Archived from Transcript? (Curriculum)	Transcript	Curriculum Transcript Report	Yes
Assigned Date	Certification	Test Report, Transaction Report, and Transcript Report	Yes
Status Change Date	Certification	Test Report, Transaction Report, and Transcript Report	Yes
Certification ID	Certification	Test Report, Transaction Report, and Transcript Report	Yes

### Reporting 2.0 - Development Plans Exception Reporting

As released with the 6 March 2020 patch release, **Development Plan exception reports** are available and include the following fields:

- Dev Plan Action Step
- Dev Plan Action Step Due Date
- Dev Plan Action Step Progress
- Dev Plan Activity Type
- Dev Plan Approval Date
- Dev Plan Category
- Dev Plan Date Created

- Dev Plan Description
- Dev Plan Due Date
- Dev Plan Is Primary
- Dev Plan Objective
- Dev Plan Objective Progress
- Dev Plan Progress
- Dev Plan Status
- Dev Plan Template Title at Plan Creation
- Dev Plan Title

## Reporting 2.0 - Performance Review Exception Reporting

As released with the 6 March 2020 patch release, **Performance Review exception reports** are available and include the following fields:

- Competency Name
- Completion Date
- Expiration Date
- Goal Assignment
- Goal Rating Score
- Goal Rating Title
- Goal Target Date
- Goal Title
- Performance Review Due Date
- Reopened
- Review Period Start Date
- Section Name
- Sign-off Declined
- Step Reviewer ID
- Step Reviewer Name
- Step Status
- Step Title
- Task Final Rating
- Task Final Rating Text
- Task Name
- Task Raw Rating
- Task Raw Rating Text
- Task Status
- Task User Title



## Release Notes Updates for May '20 Release

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

Changes made on 5 June 2020

### Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Deprecation of Manage Applicants with the October '20 Release	Deprecation of Manage Applicants with the October '20 Release	<ul style="list-style-type: none"> <li>○ The deprecation of the Manage Applicants page is moved from the October '20 release to the February '21 release.</li> <li>○ The redirects to Manage Candidates in Production and Pilot portals has been moved from the August '20 release to the February '21 release.</li> <li>○ Ending support for defects related to Manage Applicants is moved from the August '20 release to the February '21 release.</li> <li>○ This enhancement is renamed "Deprecation of Manage Applicants with the February '21 Release."</li> </ul>

Changes made on 8 May 2020

### Careers

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Visibility to Upcoming Check-Ins	Visibility to Upcoming Check-Ins	Added Release Notes for this feature. <i>This feature is targeted for a post-release patch.</i>
Check-Ins - Follow-Ups	Check-Ins - Follow-Ups	Added the following to the Assign Follow-Ups to a User section: Once a user is assigned, their personal avatar is visible. <i>The avatar functionality is available in a later patch.</i>

## Content Anytime

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Leadership and Management Subscription Refresh	Leadership and Management Subscription Refresh	<p>Added the following bullet point:</p> <ul style="list-style-type: none"> <li>○ <b>New Curriculum Blueprints</b> - Curriculum Blueprints are available for the Professional Skills, Leadership &amp; Management, and Remote Work Essentials subscriptions. Curriculum Blueprints are designed to help learning administrators create meaningful learning experiences with their CCA subscriptions, helping to increase engagement and improve performance across key skill areas. Each blueprint includes guidance on which courses to include and in which order, supplemented with blended learning materials that help employees put new skills into practice, to create the most effective and engaging learning experience. For more information and to download the blueprints, click <a href="#">here</a>.</li> </ul>
Professional Skills Subscription Refresh	Professional Skills Subscription Refresh	<p>Added the following bullet point:</p> <ul style="list-style-type: none"> <li>○ <b>New Curriculum Blueprints</b> - Curriculum Blueprints are available for the Professional Skills, Leadership &amp; Management, and Remote Work Essentials subscriptions. Curriculum Blueprints are designed to help learning administrators create meaningful learning experiences with their CCA subscriptions, helping to increase engagement and improve performance across key skill areas. Each blueprint includes guidance on which courses to include and in which order, supplemented with blended learning materials that help employees put new skills into practice, to create the most effective and engaging learning experience. For more information and to download the blueprints, click <a href="#">here</a>.</li> </ul>

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Remote Work Essentials Subscription	Remote Work Essentials Subscription	<p>Added the following bullet point:</p> <ul style="list-style-type: none"> <li>○ <b>New Curriculum Blueprints</b> - Curriculum Blueprints are available for the Professional Skills, Leadership &amp; Management, and Remote Work Essentials subscriptions. Curriculum Blueprints are designed to help learning administrators create meaningful learning experiences with their CCA subscriptions, helping to increase engagement and improve performance across key skill areas. Each blueprint includes guidance on which courses to include and in which order, supplemented with blended learning materials that help employees put new skills into practice, to create the most effective and engaging learning experience. For more information and to download the blueprints, click <a href="#">here</a>.</li> </ul>

## Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Real-Time Data Warehouse (RTDW) Optimizations	Real-Time Data Warehouse (RTDW) Optimizations	The enhancement to optimize the Learning Object "transcript_curricula" is now scheduled for a post-release patch.
RTDW Updates to Reporting API, RDW, and Data Exporter	RTDW Updates to Reporting API, RDW, and Data Exporter	Added table of deprecated objects for Data Exporter.
Workday Core Data Inbound Integration Enhancement	Workday Core Data Inbound Integration Enhancement	This is a new enhancement.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Cornerstone Learn - Training Push Notifications	Training Notifications	<p>Updated topic to reflect that the enhancement has been delayed to the June 5 patch.</p> <p>Added the following information:</p> <p>In order for a user to receive any of the above push notifications, the corresponding email triggers need to be active and configured to include the recipient in the Email Availability settings. These triggers include:</p> <ul style="list-style-type: none"> <li>○ Assign Training</li> <li>○ Training Request Denied</li> <li>○ Training is Due (if multiple Training is Due emails are configured for a training, a user will receive all such notifications on the corresponding days)</li> <li>○ Approve Training Request</li> <li>○ Request Training</li> </ul>
Learning Details Redesign (Early Adopter) Enhancements	Learning Details Redesign (Early Adopter) - Enhanced Visual Design	Updated availability note to state this enhancement has been delayed to the August 2020 release.

## Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Compensation - Currencies Redesign	Compensation - Currencies Redesign	Changed the availability message from this <i>This enhancement is targeted for the Dec 6, 2019 patch.</i> to this <i>This enhancement now available in Stage..</i>
Check-Ins - Follow-Ups	Check-Ins - Follow-Ups	Removed "If configured, the selected user is notified that they are assigned a follow-up action item." from the <i>Assign Follow-Ups to a User</i> section. Notifications are not available in this release.

## Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Hiring Manager Experience - Request Candidate Feedback Enhancements	Hiring Manager Experience - Request Candidate Feedback Enhancements	Added information about how to resolve an error after clicking the shareable link when a feedback request is submitted.

Changes made on 24 April 2020

## Careers

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Check-Ins Template – Checking In During Difficult Times	Check-Ins Template – Checking In During Difficult Times	Changed the availability message from <i>This feature is not available during UAT.</i> to <i>This feature is available in Stage portals as of 21 April 2020.</i>

## Content Anytime

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Leadership and Management Subscription Refresh	Leadership and Management Subscription Refresh	Removed references to Learning Pathways, as this is not available with the May 2020 release.

## Core/General

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
eCare Redirect to Support Central	eCare Redirect to Support Central	This is a new enhancement.
jQuery Library Upgrade	jQuery Library Upgrade	Updated content to indicate that Pilot and Stage environments are being auto-upgraded with the May Release.  Added that following the jQuery Library 3.4 upgrade, users on an unsupported browser or operating system will not be able to navigate Cornerstone.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		Updated the rollout schedule.
OU API (Early Adopter)	OU API (Early Adopter)	This functionality has been removed because it is currently in a closed Beta.
Real-Time Data Warehouse (RTDW) Optimizations	Real-Time Data Warehouse (RTDW) Optimizations	This functionality available in Stage portals as of 21 April 2020.
RTDW Updates to Reporting API, RDW, and Data Exporter	RTDW Updates to Reporting API, RDW, and Data Exporter	This functionality available in Stage portals as of 21 April 2020.

## Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Cornerstone Learn - Playlists	Cornerstone Learn App - Playlist Features	Removed line referencing a new <b>Playlists</b> link on the Learner Home page of the Android version of the Learn app. This addition of this link was cancelled and it will not be made available.
Learning Details Redesign (Early Adopter) Enhancements	Learning Details Redesign (Early Adopter) Enhancements - Overview  Learning Details Redesign (Early Adopter) - Locator Number	Added a note to indicate that the visibility of the locator number is dependent on an ILT Preferences setting, which controls Session ID and Locator Number visibility.
Set an End Date for Dynamic Assignments	Create Assignment - Processing End Date	Removed references to selecting a time for the <b>Processing End Date</b> setting. Only a date can be selected for the <b>Processing End Date</b> field; the selection of a time is NOT yet supported.
Training Launch Enhancements	Training Launch Behaviors	Updated topic to explain that the <b>Request</b> and <b>Register</b> actions are not bypassed when a training item has a training purpose associated with it.

## 17 April Patch Release Functionality

## What's New for the 17 April 2020 Patch Release

The following is released along with the 17 April 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Core/General	Cornerstone Mobile App Removal from App Stores	The Cornerstone Mobile app will be removed from the Apple App and Google Play stores on April 30, 2020. The app will be deprecated in August 2020 and will no longer function for users if opened following its deprecation in August.



## 22 May Patch Release Functionality

## What's New for the 22 May 2020 Patch Release

The following is released along with the 22 May 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Core	Bulk API (User & OU)	With this enhancement, a new Bulk API is available for user and organizational unit (OU) loads. Bulk APIs provide organizations the ability to leverage a highly scalable and resilient framework to create and update data in Cornerstone via APIs.
Core	Language Pack Updates	New updates to the French (France) Language Pack is available with the 22 May 2020 Patch Release. Please visit the <a href="#">May 22, 2020 Patch Localization Update - French France</a> posting in the Success Center to review the full list of changes.

## Core

## Bulk API (User & OU)

With this enhancement, a new Bulk API is available for user and organizational unit (OU) loads. Bulk APIs provide organizations the ability to leverage a highly scalable and resilient framework to create and update data in Cornerstone via APIs.

- It is optimized for loading large data sets in an asynchronous, queued model. It is ideal for bulk load use cases where there is a need to create or update data into your Cornerstone portal using APIs. For example, you can use Bulk APIs to keep employee and OU data in sync from your HRIS into Cornerstone.
- It supports the OAuth 2.0 authentication framework released in August 2019.
- It supports the portal configurations including custom fields, custom employee relationships, and availability settings for custom fields.

Use the API to retrieve the status of your loads as well as obtain a full report of the load performed including errors and warnings. Additionally, all the loads performed using the Bulk API are visible in a new Bulk API History page in Edge. The Bulk API History page is only visible to users who have the new Access Edge Bulk API History permission. Additional load-type specific permissions control the downloading of reports from the history page.

### How Does this Enhancement Benefit My Organization?

This API enables organizations to keep their employee and organizational unit (OU) information in Cornerstone up-to-date by loading data in bulk with a modern, scalable REST API.

### API Explorer

Documentation for all available APIs is available in the API Explorer.

- <https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/>

### Considerations

- Organizations using Cornerstone HR cannot use the Bulk API to load employee data since effective dating is not yet supported by the Bulk API.
- SII fields and secure custom fields are not supported by the Bulk API.
- There are new OAuth 2.0 scopes for Bulk API endpoints which is visible while registering a new OAuth 2.0 application or modifying an existing OAuth 2.0 application. Organizations with existing OAuth 2.0 applications must explicitly select the Bulk API scopes before utilizing the Bulk API endpoints.

### Implementation

Organizations can self-activate the Bulk API for users and OUs via the Edge Marketplace in Pilot and Stage environments.

Organizations wanting to use the Bulk API in Production must submit a purchase inquiry via the Edge Marketplace. [See Edge API - Purchase Inquiry.](#)

The Access Edge Bulk API History permission is assigned the System Administrator role by default. The remaining new permissions are enabled upon activation. Additional documentation is available in the API Explorer upon release of the Bulk API.

## Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Bulk API History	Grants access to the Bulk API History page, which displays all the loads that have been performed using the Bulk API. Administrators can select a load to view additional details of the load, including the results. This permission cannot be constrained. This is an administrator permission.	Edge
Access Edge Bulk API	Grants ability to access and utilize the Bulk API. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Cost Center OU	Grants ability to use the Bulk API to load cost center organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Custom OU	Grants ability to use the Bulk API to load custom organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Division OU	Grants ability to use the Bulk API to load division organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.	Edge

	This permission is only available when the Bulk API is enabled via Edge Marketplace.	
Bulk API - Employee	<p>Grants ability to use the Bulk API to load employee data. This permission cannot be constrained. This is an administrator permission.</p> <p>This permission is only available when the Bulk API is enabled via Edge Marketplace.</p>	Edge
Bulk API - Grade OU	<p>Grants ability to use the Bulk API to load grade organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.</p> <p>This permission is only available when the Bulk API is enabled via Edge Marketplace.</p>	Edge
Bulk API - Legal Entity OU	<p>Grants ability to use the Bulk API to load legal entity organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.</p> <p>This permission is only available when the Bulk API is enabled via Edge Marketplace.</p>	Edge
Bulk API - Location OU	<p>Grants ability to use the Bulk API to load location organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.</p> <p>This permission is only available when the Bulk API is enabled via Edge Marketplace.</p>	Edge
Bulk API - Position OU	<p>Grants ability to use the Bulk API to load position organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.</p> <p>This permission is only available when the Bulk API is enabled via Edge Marketplace.</p>	Edge

## Security Roles

Upon release, the Edge Bulk API History permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

The remaining new permissions are disabled until the Bulk API is enabled through Edge Marketplace, at which time they are granted to the default System Administrator role.

## Language Pack Updates

New updates to the French (France) Language Pack is available with the 22 May 2020 Patch Release. Please visit the [May 22, 2020 Patch Localization Update - French France](#) posting in the Success Center to review the full list of changes.

## Implementation

This functionality is automatically enabled for all organizations.



## 5 June Patch Release Functionality

## What's New for the 5 June 2020 Patch Release

The following is released along with the 5 June 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Careers	Constrain the "Check-Ins Home Page Customization - Manage" Permission	With this enhancement, constraints can be added to the "Check-Ins Home Page Customization - Manage" permission to limit which organizational units (OU) an administrator has access to when customizing Check-Ins home pages.
Careers	Display Avatar of Assignee in Follow-Ups	With this release, once a user is assigned to a follow-up action item, their personal Avatar appears next to the assigned item on the main page and the follow-ups flyout.
Core	Kronos Workforce Ready (WFR) Core Data Inbound Integration - Add "Kronos WFR API Base URL" Field	<p>After this enhancement, administrators can and must configure their company-specific <b>Kronos WFR API Base URL</b> on the Settings page of their Kronos Workforce Ready (WFR) Core Data Inbound Integration in Edge.</p> <p>Administrators must enter this URL in order for the integration to run successfully.</p> <p><b>This enhancement is targeted to be released off-cycle on June 9.</b></p>
Core	Real-Time Data Warehouse (RTDW) Optimizations	With the June 5 patch, one optimization improves performance in the Real-Time Data Warehouse (RTDW).
Core	Reporting 2.0 - Calculated Fields	With this enhancement, calculated fields can be created in Reporting 2.0. Calculated fields enable organizations to generate aggregated reports based on totals of data. Having this functionality available in Reporting 2.0 will help administrators, managers, and analysts to create simple, custom calculations of their reporting data without having to export and manipulate that data in a different tool.
Engage	Engage Lite	With the June 5 patch, Cornerstone launches Engage Lite, a free offering that provides pre-configured surveys that clients can use to understand how their employees are feeling during a crisis. Any Cornerstone client can use Engage Lite, even those who have not

MODULE	FEATURE	DESCRIPTION
		previously purchased Performance or Engage products.
Learning	Cornerstone Learn - Apple Human Interface Guidelines UI Enhancements (iOS)	<p>Key design principles from Apple's Human Interface Guidelines (HIG) have been applied to enhance the user experience and modernize the Learn app for iOS users. With this enhancement, Cornerstone has enabled the following:</p> <ul style="list-style-type: none"> <li>○ Apple's built-in system fonts</li> <li>○ Dynamic type sizes</li> <li>○ Multi-tasking functionality for iPad users</li> <li>○ iOS standard navigation bar</li> <li>○ Replaced the navigation menu with links</li> </ul>
Learning	Learning Details Redesign (Early Adopter) – Ability to Control Data Display	With this enhancement, the Learning Details Preferences page has been updated to be responsive and allow administrators to control visibility of the metadata that displays on the Learning Details page, such as Available Languages, Subjects, Provider, and more.
Learning	"Price Visible" Preference Moved to Learning Details Preferences	With this enhancement, the <b>Price and Training Units</b> visibility setting has been moved from the Content Requesting Preferences page to the new Page Display section of the Learning Details Preferences page. This setting still controls price visibility on both the legacy and redesigned Learning Details pages. In addition, an <b>Only Display when Value is Greater than Zero</b> sub-option is available, allowing administrators to determine whether a price displays for training items with no cost.
Learning	Withdraw from Session Email Tag Added to "Session Start Date" Email	With this enhancement, a new WITHDRAW.SESSION.LINK email tag is available for Session Start Date emails. The WITHDRAW.SESSION.LINK tag is SSO enabled but is also available for non-SSO enabled portals. This tag displays as a link in the email, and if the user clicks the link, they are navigated to the Cancel Registration page of the selected event. The learner then only needs to select a reason for their withdrawal. This new

MODULE	FEATURE	DESCRIPTION
		tag allows administrators to save their users time and deliver a better ILT user experience.
Learning - Integrations and APIs	eeds - Continuing Medical Education Integration	With this enhancement, a new eeds integration is available via the Edge Marketplace, allowing organizations to view and track CME credits imported from eeds within learners' transcripts in the Cornerstone Learning Management System (LMS). Using this integration, learners and learning administrators are able to search, find, and confirm CME credits on the learner's transcript.
Recruiting	Assessment Connector - Redirect URL	With this enhancement, a <b>Supports RedirectUrl</b> field is added to the Settings page for the Assessment Connector integration. When this field is toggled to on, candidates are redirected to the assessment in the same tab as the application workflow.

## Careers

## Check-Ins - Constrain the "Check-Ins Home Page Customization - Manage" Permission

Prior to this enhancement, administrators were unable to constrain the Check-Ins Home Page Customization - Manage permission. This meant that a sole administrator had the responsibility to update and maintain all of the Check-Ins customized home pages across an organization.

With this enhancement, constraints can be added to the "Check-Ins Home Page Customization - Manage" permission to limit which organizational units (OU) an administrator has access to when customizing Check-Ins home pages. This allows administrators to assign to other administrators, customization tasks for specific check-ins home pages.

Old permission:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Home Page Customization - Manage	Grants ability to manage the Check-Ins Home Page. This permission cannot be constrained. This is an administrator permission.	Performance

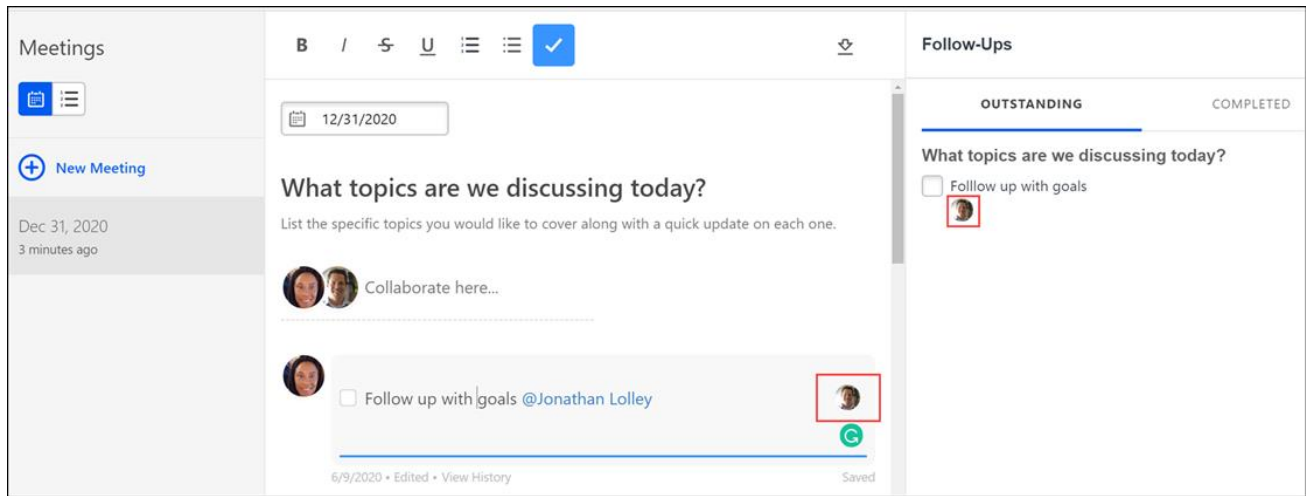
New permission:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Home Page Customization - Manage	Grants ability to manage the Check-Ins Home Page. This permission can be constrained by OU. This is an administrator permission.	Performance

To open the administrator edit view, go to [ADMIN > PERFORMANCE MANAGEMENT](#) >. In the Check-Ins section, click Home Page Customization, and then select a division name.

## Check-Ins - Display Avatar of Assignee in Follow-Ups

With this release, once a user is assigned to a follow-up action item, their personal Avatar appears next to the assigned item on the main page and the follow-ups flyout.



### Implementation

This functionality is enabled for all clients using the Check-Ins feature.

### Permissions

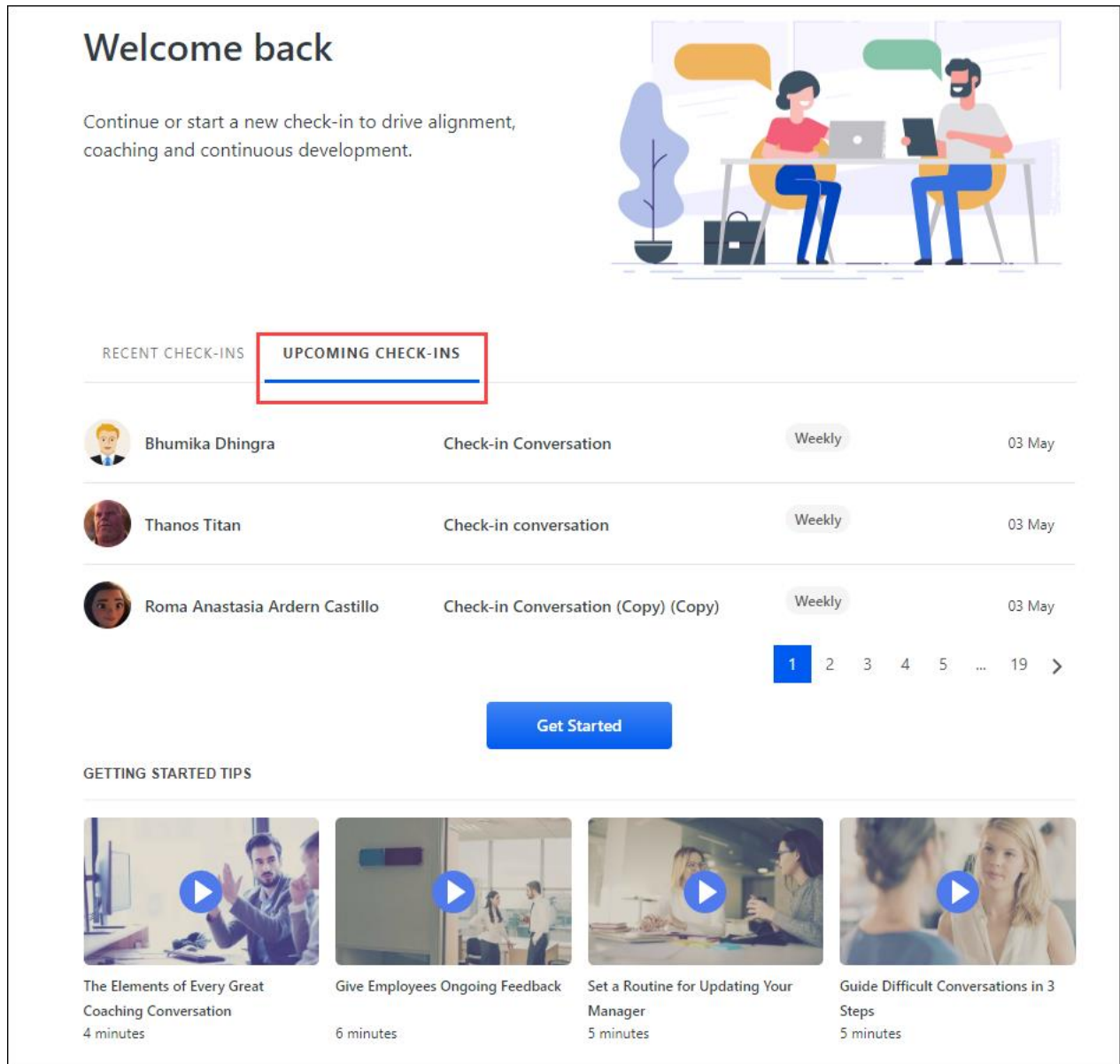
The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self And Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. This is an end user permission.	Performance

## Check-Ins - Visibility to Upcoming Check-Ins

Prior to this enhancement, end users were only able to view Recent Check-Ins on the Check-Ins home page.




With this enhancement, users can now view and take action on Upcoming Check-Ins directly from the Check-Ins home page.



**Welcome back**

Continue or start a new check-in to drive alignment, coaching and continuous development.


RECENT CHECK-INS **UPCOMING CHECK-INS**

	Bhumika Dhingra	Check-in Conversation	Weekly	03 May
	Thanos Titan	Check-in conversation	Weekly	03 May
	Roma Anastasia Ardern Castillo	Check-in Conversation (Copy) (Copy)	Weekly	03 May


1 2 3 4 5 ... 19 >

[Get Started](#)


**GETTING STARTED TIPS**




The Elements of Every Great Coaching Conversation  
4 minutes



Give Employees Ongoing Feedback  
6 minutes



Set a Routine for Updating Your Manager  
5 minutes



Guide Difficult Conversations in 3 Steps  
5 minutes

## Implementation

This functionality is enabled for all clients using the Check-Ins feature.

## Permissions

The following existing permission applies to this functionality:



PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self And Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. This is an end user permission.	Performance

## Core

## Kronos Workforce Ready (WFR) Core Data Inbound Integration - Add "Kronos WFR API Base URL" Field

After this enhancement, administrators can and must configure their company-specific **Kronos WFR API Base URL** on the Settings page of their Kronos Workforce Ready (WFR) Core Data Inbound Integration in Edge.

Administrators must enter this URL in order for the integration to run successfully.

**This enhancement is targeted to be released off-cycle on June 9.**

[See Kronos Workforce Ready Core Data Inbound Integration.](#)

### Implementation

This functionality is automatically enabled for organizations using the Kronos WFR Core Data Inbound Integration.

This integration is available for self-activation via the Kronos Workforce Ready Core Data Inbound Integration tile in Edge Marketplace. This integration is for organizations that use Kronos Workforce Ready as a source of HR data. Once the integration is available, please refer to the Kronos Workforce Ready Core Data Inbound Integration Starter Guide document under the Getting Started tab for details on how to enable the integration in your portal. There is no additional cost for this integration.

The following 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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Real-Time Data Warehouse (RTDW) Optimizations

With the June 5 patch, the following optimization improves performance in the Real-Time Data Warehouse (RTDW).

### Optimize Learning Object "forms2-submissions"

This enhancement applies to Cornerstone HR and Cornerstone Recruiting clients running forms reports using the Reporting API, Data Exporter, and Replicated Data Warehouse (RDW). To lessen the risk of ETL failure when generating forms data, the query used to update the "forms2-submissions" object is updated to only return question bank and custom fields used in a form (both published and non-published). Prior tot his enhancement, unused fields were returned.

### Implementation

This functionality is automatically enabled for all organizations using RTDW.

## Reporting 2.0 - Calculated Fields

## Reporting 2.0 - Calculated Fields - Overview

Prior to this enhancement, calculated fields could be created in Custom Reports but were not available in Reporting 2.0. In addition, only eight functions were available, and they were only aggregate functions.

With this enhancement, calculated fields can be created in Reporting 2.0. Calculated fields enable organizations to generate aggregated reports based on totals of data. Having this functionality available in Reporting 2.0 will help administrators, managers, and analysts to create simple, custom calculations of their reporting data without having to export and manipulate that data in a different tool.

Calculated fields can be:

- Added as a field to the report
- Added as a filter
- Added as chart criteria
- Aggregated
- Used in summarizing a report
- Used in sorting a report

### Interface Improvements

The calculated fields user interface (UI) in Reporting 2.0 offers a cleaner, more simplified look than the existing functionality in Custom Reports. Additional calculation functions have been added, and every function includes use examples.

With calculated fields, you can also:

- Create fields that contain a mix of text, math, date, and logical functions/operators to enhance your reporting capabilities
- Follow a guided user experience for leveraging the calculated fields feature
- Import your existing custom reports containing calculated fields
- Expect ongoing development to support new functions based on feedback

### Implementation

The ability to create calculated fields is available in Reporting 2.0 for all portals.

As part of the May '20 release, Reporting 2.0 was made Generally Available (GA) and has been enabled automatically for all clients who did not self-enable Reporting 2.0 prior to the May '20 release. [See Reporting 2.0 - General Availability](#) on page 180 *for additional information*.

### Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Reporting - Manage Global Calculated Fields	<p>Grants the ability to publish calculated fields to all users. This permission cannot be constrained.</p> <p><b>Note:</b> <i>Calculated fields can be created by all users who have permission to create reports in Reporting 2.0. However, in order to publish the calculated field globally, a user needs permission to manage global calculated fields.</i></p>	Reporting
---------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------

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

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

## Create Calculated Field

All users who have permission to create reports in Reporting 2.0 can create calculated fields. Fields are created from the **Calculated Fields** area of the Data panel in the **report builder**.

However, to publish fields globally, users must have permission to manage global calculated fields. If a user does not have that permission, then the **option to publish the field globally** cannot be toggled on.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Manage Global Calculated Fields	<p>Grants the ability to publish calculated fields to all users. This permission cannot be constrained.</p> <p><b>Note:</b> <i>Calculated fields can be created by all users who have permission to create reports in Reporting 2.0. However, in order to publish the calculated field globally, a user needs permission to manage global calculated fields.</i></p>	Reporting

To create a calculated field, click the plus icon to the right of the Calculated Fields section in the report builder. This opens the calculated field editor. Inline help text appears for some fields on the editor when you hover over the field.



### Step 1 - Enter Name/Description

Enter a name for the field in the **Name** field, up to 80 characters.

Enter a description in the **Description** field, up to 500 characters. **Note:** *The description will be visible to all users if the field is a global field.*

1. Click the plus icon to the right of the Calculated Fields section in the report builder. This opens the calculated field builder.
2. Enter a **Name**, up to 80 characters.
3. Enter a **Description**, up to 500 characters. **Note:** *The description will be visible to all users if the field is a global field.*

### Step 2 - Select Output Type

The output type is the data type of the field. Select one of the following in the **Output Type** field:

- Number - When this option is selected, you can also define a decimal point value between 0 and 30. The default value is 2.
- Date
- Date/Time
- Text

### Step 3 - Create Formula

The Formula field is where you create your formula for the calculation.

## Add Fields to Formula

Standard and custom report fields, as well as existing calculated fields, are available to add from the Fields section. The fields that display are based on the current state of the report, so some fields will not be available to include because they are not available for the type of report you are creating.

You can filter the fields by entering field names to narrow down your search.

Add a field to your formula by clicking the field. The field appears in the formula and will have curly brackets around it.

**Note:** When adding a calculated field to the formula, the field description displays at the bottom of the Fields tab. Calculated fields can only be referenced up to one level.

## Add Operators to Formula

Operators are used to perform a calculation using the fields you have added to your formula (e.g., ({Training.Training Hours} \* {Training.Training Price})).

Click **SHOW OPERATORS** to view the operators. The operator will be added to the current position of the cursor within the **Formula** field. If the cursor is not currently within the **Formula** field, the operator is added either to the beginning of the formula or to the previous location of the cursor within the **Formula** field.

**Note:** When using parentheses, for each open parenthesis (i.e., "("), you must also include a closed parenthesis (i.e., ")").

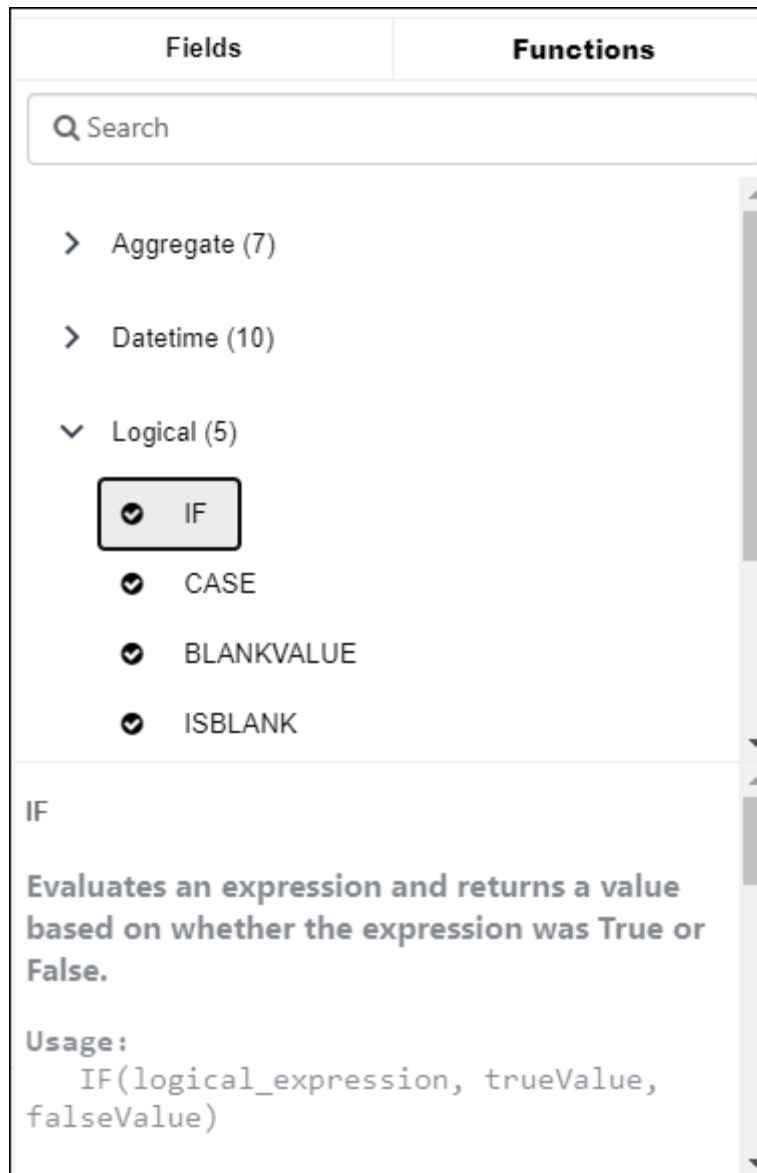
The following operators are available and must be entered into the formula manually:

MATH OPERATORS		LOGICAL OPERATORS		TEXT OPERATORS	
Add	+	Equal	= and ==	Concatenate	&
Subtract	-	Not Equal	<> and !=		

MATH OPERATORS		LOGICAL OPERATORS		TEXT OPERATORS	
Multiply	*	Less than	<		
Divide	/	Greater than	>		
Parentheses	( )	Less than or Equal	<=		
		Greater than or Equal	>=		
		AND	&&		
		OR			

#### [Add Functions to Formula](#)

Functions are organized into categories based on math, logic, date, and text. Selecting a function shows its description at the bottom of the Functions tab.



To add a function, double click it or select it and hit the Enter key. The function is added at the cursor's position in the **Formula** field, and then the cursor is repositioned at the end of the object and is followed by a space.

If the function takes at least one argument, then the function is added to the **Formula** field at the cursor's position, then the **Formula** field cursor is repositioned between the function's parentheses.

### How to View Help Text for Functions

Help text is included for each function. To view the help text, click a function. The explanation of the function appears at the bottom of the Functions tab.

The following functions are available:

[Aggregate](#)

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
GMAX	Returns the highest numeric value of the field in the report. If the report is summarized, it returns the highest numeric value of the field in each group.	MAX(numeric_field)	MAX(salary)
GMIN	Returns the lowest numeric value of the field in the report. If the report is summarized, it returns the lowest numeric value of the field in each group.	MIN(numeric_field)	MIN(salary)
GCOUNT	Returns the aggregated number of field values in the report. If the report is summarized, it returns the number of field values in each group.	GCOUNT(field)	GCOUNT(User Name)
GCOUNTUNIQUE	Returns the aggregated number of unique field values in the report. If the report is summarized, it returns the number of unique field values in each group.	GCOUNTUNIQUE(field)	GCOUNTUNIQUE(User Name)
GSUM	Returns the aggregated sum for all rows of a given numeric field. If the report is summarized, it returns the aggregated sum for each group of a given numeric field.	SUM(numeric_field)	SUM(salary)
GAVG	Returns the aggregated average for all rows of a given numeric field. If the report is summarized, it returns the aggregated average for each group of a given numeric field.	AVG(numeric_field)	AVG(salary)

#### Date/Time Functions

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
DATE	Returns a date value from the year, month, and day values you enter.	DATE(year,month,day) <ul style="list-style-type: none"> <li>Year must be 4 digits</li> <li>Month must be 2 digits</li> <li>Day must be 2 digits</li> </ul>	DATE(2020,02,25) returns 02/25/2020 as Date type
DATEDIFF	Returns the difference between two dates.	DATEDIFF(interval, date1, date2) <ul style="list-style-type: none"> <li>Interval determines what part of the date will be subtracted. The following inputs can be</li> </ul>	<ul style="list-style-type: none"> <li>DATEDIFF(Day,01/25/2020,01/27/2020) returns 2 as Numeric type</li> <li>DATEDIFF(Day,01/27/2020,01/25/2020</li> </ul>

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
		used: Year, Quarter, Month, Dayofyear, Day, Week.	<ul style="list-style-type: none"> <li>) returns -2 as Numeric type</li> <li>o DATEDIFF(Year,12/31/2020,01/01/2021) returns 1 as Numeric type</li> </ul>
DATEVALUE	Returns the date value of a given Date/Time or Expression.	DATEVALUE(expression)	<ul style="list-style-type: none"> <li>o DATEVALUE("01/25/2020") returns 01/25/2020 as Date type</li> <li>o DATEVALUE("01/25/2020 08:25:59.248") returns 01/25/2020 as Date type</li> </ul>
DATETIMEVALUE	Returns the Date & Time value of a given Date/Time or Expression.	DATETIMEVALUE(expression)	<ul style="list-style-type: none"> <li>o DATEVALUE("01/25/2020") returns 01/25/2020 00:00:00.000 as Date/Time type</li> <li>o DATEVALUE("01/25/2020 08:25:59.248") returns 01/25/2020 08:25:59.248 as Date/Time type</li> </ul>
DAY	Returns a day of the month as a numeric value.	DAY(date)	<ul style="list-style-type: none"> <li>o If the value of Transcript_Due_Date is 01/25/2020, DAY(Transcript_Due_Date) generates 25 as Numeric type</li> <li>o DAY(DATEVALUE("01/25/2020")) returns 25 as Numeric type</li> <li>o If the current day is 01/07/2020,</li> </ul>

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
			DAY(TODAY()) returns 7 as Numeric type
MONTH	Returns the month of a year. The number corresponds to each month of the year from 1 (January) to 12 (December).	MONTH(date)	<ul style="list-style-type: none"> <li>○ If the value of Transcript_Due_Date is 05/14/2020, MONTH(Transcript_Due_Date) generates 5 as Numeric type</li> <li>○ MONTH(DATEVALUE("02/27/2020")) returns 2 as Numeric Type</li> <li>○ If the current day is 07/23/2020, MONTH(TODAY()) returns 7 as Numeric type</li> </ul>
HOUR	Returns the hour of the DateTime specified.	HOUR(datetime)	HOUR(DATEVALUE("1/25/2020 08:25:59.248")) returns 8
NOW	Returns the Date/Time value of the current moment	NOW()	<p>For the following examples, the current date is 01/25/2020 and current time is 08:25:59.248</p> <ul style="list-style-type: none"> <li>○ NOW() returns 01/25/2020 08:25:59.248 as Date/Time type</li> <li>○ DAY(NOW()) returns 25 as Numeric type</li> <li>○ MONTH(NOW()) returns 1 as Numeric type</li> </ul>

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
TODAY	Returns the current date	TODAY()	<p>For the following examples, the current date is 07/18/2020 and current time is 10:54:38.885</p> <ul style="list-style-type: none"> <li>○ TODAY() returns 07/18/2020 as Date/Time type</li> <li>○ DAY(TODAY()) returns 18 as Numeric type</li> <li>○ MONTH(TODAY()) returns 7 as Numeric type</li> </ul>
YEAR	Returns the year of a given date	YEAR(date)	<ul style="list-style-type: none"> <li>○ If the value of Transcript_Due_Date is 02/24/2019, YEAR(Transcript_Due_Date) generates 2019 as Numeric Type</li> <li>○ YEAR(DATEVALUE("08/12/2021")) returns 2021 as Numeric Type</li> <li>○ If the current day is 07/23/2020, YEAR(TODAY()) returns 2020 as Numeric Type</li> </ul>

### Logical Functions

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
IF	Evaluates an expression and returns a value based on whether the expression was True or False.	<p>IF(logical_expression, trueValue, falseValue)</p> <ul style="list-style-type: none"> <li>○ logical_expression is the expression to be evaluated as true or false</li> </ul>	<ul style="list-style-type: none"> <li>○ IF(DATEDIFF(Day, Transcript_Due_Date, TODAY()) &lt; 7, "Due Soon", "Not Due Soon") Evaluates</li> </ul>



FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
		<ul style="list-style-type: none"> <li>○ trueValue is the return value if the expression was true</li> <li>○ falseValue is the return value if the expression was false</li> </ul> <p><b>Note:</b> trueValue and falseValue must be the same data type.</p>	<p>whether Transcript_Due_Date is less than 7 days from today:</p> <ul style="list-style-type: none"> <li>○ Returns Due Soon as Text type for records that are less than 7 days</li> <li>○ Returns Not Due Soon as Text type if not less than 7 days</li> <li>○ IF(DATEDIFF(Day, Transcript_Due_Date, TODAY()) &lt; 7, 1, 2) <ul style="list-style-type: none"> <li>○ Returns 1 as Numeric Type for records that are less than 7 days</li> <li>○ Returns 2 as Numeric Type if not less than 7 days</li> </ul> </li> </ul>
CASE	Evaluates an expression against multiple values and returns a corresponding result for any matches.	CASE(expression, value1, result1, value2, result2, ..., elseResult) <ul style="list-style-type: none"> <li>○ value is value being compared to expression</li> </ul>	CASE(Transcript_Status, "Not Started", 1, "In Progress", 2, "Completed", 3, 4) Evaluates

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
	Returns a default value if there were no matches.	<ul style="list-style-type: none"> <li>○ result: Return value if the expression was equal to its corresponding value</li> <li>○ elseResult: Return value if there was no matched value</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>○ <i>All values should be the same data type</i></li> <li>○ <i>All results should be the same data type</i></li> <li>○ <i>Returns #ERROR! if any expression in the function gives an error</i></li> </ul>	<p>Transcript_Status and:</p> <ul style="list-style-type: none"> <li>○ returns 1 as Numeric Type if status was Not Started</li> <li>○ returns 2 as Numeric Type if status was In Progress</li> <li>○ returns 3 as Numeric Type if status was Completed</li> <li>○ returns 4 as Numeric Type if status was anything else</li> </ul>
BLANKVALUE	Checks if an expression has a value and returns a set expression if does not. Otherwise, it returns the original value.	<p>BLANKVALUE(expression, setExpression)</p> <ul style="list-style-type: none"> <li>○ setExpression: the replacement value if the result of the expression was blank</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>○ <i>A field is not blank if it contains a zero or blank spaces</i></li> <li>○ <i>expression and setExpression must contain the same data types</i></li> </ul>	<p>BLANKVALUE(New_Division_2, "Not Assigned") evaluates New_Division_2 and:</p> <ul style="list-style-type: none"> <li>○ returns the value of New_Division_2 as Text type if there was a value</li> <li>○ returns Not Assigned as Text type for blank values</li> </ul>
ISBLANK	Checks if an expression has a value and returns True if it does, and returns False if it does not.	ISBLANK(expression)	ISBLANK(New_Division_2) evaluates New_Division_2 and:

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLE
			<ul style="list-style-type: none"> <li>○ returns True as Boolean type if there is a value</li> <li>○ returns False as Boolean type if it was blank</li> </ul>
ISNUMBER	Checks if a text value is a number and returns True if it is, otherwise returns False. Returns False for blank values.	ISNUMBER(text)	<ul style="list-style-type: none"> <li>○ ISNUMBER("2539") returns True as Boolean type</li> <li>○ ISNUMBER("2539") returns False as Boolean type</li> <li>○ ISNUMBER("2,539") returns False as Boolean type</li> <li>○ ISNUMBER("25.39") returns True as Boolean type</li> </ul>

#### Numeric Functions

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLES
ABS	Returns the absolute value of a number. The absolute value of a number is always the positive value of the number.	ABS(number)	<ul style="list-style-type: none"> <li>○ ISNUMBER(-2539) returns 2539 as Numeric type</li> <li>○ ISNUMBER(-2539) returns numeric 2539 as Numeric type</li> <li>○ ABS({Transcript.FinalGrade}) <ul style="list-style-type: none"> <li>○ This formula will return the absolute value of a</li> </ul> </li> </ul>

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLES
			Final Grade field
FLOOR	Returns a number rounded down to the nearest whole number. If the number is negative, the number is rounded towards zero.	FLOOR(number)	<ul style="list-style-type: none"> <li>○ FLOOR(8.9) returns 8 as Numeric type</li> <li>○ FLOOR(8.9) returns --8-9 as Numeric type</li> <li>○ FLOOR(9.1) returns 9 as Numeric type</li> <li>○ FLOOR(9.1) returns 9 -10 as Numeric type</li> </ul>
CEILING	Returns a number rounded up to the nearest whole number. If the number is negative, the number is rounded away from zero.	CEILING(number)	<ul style="list-style-type: none"> <li>○ CEILING(8.9) returns 9 as Numeric type</li> <li>○ CEILING(8.9) returns 9-8 as Numeric type</li> <li>○ CEILING(9.1) returns 10 as Numeric type</li> <li>○ CEILING(9.1) returns 10 -9 as Numeric type</li> </ul>
ROUND	Returns a number that is rounded to a specified number of digits.	ROUND(number, decimals)	<ul style="list-style-type: none"> <li>○ ROUND(71.4684, 0) returns 71 as Numeric type</li> <li>○ ROUND(71.4684, 2) returns 71.47 as Numeric type</li> <li>○ ROUND(71.4684, 3) returns 71.478 as Numeric type</li> </ul>

## Text Functions

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLES
CONTAINS	Compares two text values and returns True if the first value contains the second value, otherwise it returns False.	CONTAINS(text1, text2)	<ul style="list-style-type: none"> <li>CONTAINS("Not Started", "Started") returns True as Boolean type</li> <li>CONTAINS("Not Started", "started") returns False as Boolean Type</li> <li>CONTAINS("Not Started", "ot") returns True as Boolean type</li> </ul>
LEFT	Returns a set number of characters starting from the beginning of a text value.	LEFT(textValue, number) <ul style="list-style-type: none"> <li><i>number</i> specifies the number of characters to return from textValue</li> </ul>	<ul style="list-style-type: none"> <li>LEFT("Reporting", 6) returns Report as Text type</li> <li>LEFT("Reporting", 4) returns Repo as Text type</li> <li>LEFT("Reporting", 2) returns Re as Text type</li> <li>LEFT("Reporting", 0) returns Blank</li> </ul>
MID	Returns a set number of characters from a specified starting point of a text value.	MID(textValue, num1, num2) <ul style="list-style-type: none"> <li>num1 specifies the number of characters from the left to use as the starting point</li> <li>num2 specifies the number of characters to return from textValue</li> </ul>	<ul style="list-style-type: none"> <li>MID("Reporting", 2, 4) returns port as Text type</li> <li>MID("Reporting", 0, 4) returns Repo as Text type</li> <li>MID("Reporting", 5, 3) returns rti as Text type</li> <li>MID("Reporting", 4, 0) returns Blank</li> </ul>
RIGHT	Returns a set number of characters starting from the end of a text value.	RIGHT(textValue, number) <ul style="list-style-type: none"> <li><i>number</i> specifies the number of</li> </ul>	<ul style="list-style-type: none"> <li>RIGHT("Reporting", 6) returns orting as Text type</li> <li>RIGHT("Reporting", 4) returns tingasText type</li> </ul>

FUNCTION	DESCRIPTION	HOW TO USE	EXAMPLES
		characters to return from textValue	<ul style="list-style-type: none"> <li>RIGHT("Reporting",2) returns ngasText type</li> <li>RIGHT("Reporting",0) returns Blank</li> </ul>
TEXT	Returns any specified value as a text value.	TEXT(anyValue)	<ul style="list-style-type: none"> <li>TEXT(5) returns 5 as Text type</li> <li>TEXT(Current_Compensation) returns the current_compensation value as Text type</li> </ul>
TRIM	Removes any spaces that come before or after a text value.	TRIM(textValue)	<ul style="list-style-type: none"> <li>TRIM(" Reporting Fun") returns Reporting Fun as Text type</li> <li>TRIM("Reporting Fun ") returns Reporting Fun as Text type</li> <li>TRIM("Reporting Fun") returns Reporting Fun as Text type</li> </ul>
CONCAT	Concatenates multiple text values.	CONCAT(text1, text2, ...)	<ul style="list-style-type: none"> <li>CONCAT("Reporting","Is","Great") returns ReportingIsGreat as Text type</li> <li>CONCAT("Reporting ","Is","Great") returns Reporting Is Great as Text type</li> <li>CONCAT("Transcript due date is",TEXT(DATEDIFF(Day,Transcript_Due_Date,TODAY()))," days away") returns Transcript due date is 3 days away as Text type</li> </ul>
UPPER	Converts any letter in a specified text value to be uppercase.	UPPER(textValue)	<ul style="list-style-type: none"> <li>UPPER("Reporting Fun") returns REPORTING FUN as Text type</li> <li>UPPER("Reporting 5") returns REPORTING 5 as Text type</li> </ul>

FUNCT ION	DESCRIPTION	HOW TO USE	EXAMPLES
LOWE R	Converts any letter in a specified text value to be lowercase.	LOWER(textValue)	<ul style="list-style-type: none"> <li>○ LOWER("Reporting Fun") returns reporting fun as Text type</li> <li>○ LOWER("Reporting 5") returns reporting 5 as Text type</li> </ul>
LEN	Returns the number of characters in a specified text string.	LEN(textValue)	<ul style="list-style-type: none"> <li>○ LEN("Reporting Fun") returns 13 as Numeric type</li> <li>○ LEN("Reporting 5") returns 11 as Numeric type</li> <li>○ LEN("A C") returns 3 as Numeric type</li> <li>○ LEN("AC") returns 2 as Numeric type</li> </ul>

#### Step 4 - Publish Field Globally

This option is visible to users who have permission to manage global calculated fields. This option is off by default. Toggle it to on to set the field to publish globally once the field is saved.

A field that is published globally appears in the **Global Fields** section. Any user with permission to view the fields that were used to create the calculated field can:

1. See the calculated field in the Global Fields section.
2. Use the calculated field in a report.
3. View the calculated field's data within the constraints of their permissions.

Once a field is published globally, the field cannot be unpublished. The field can be deleted. [See Edit, Copy, or Delete Calculated Field](#) on page 76 *for additional information*.

#### Step 5 - Validate and Save

You can validate your formula while building it or when the calculated field is saved.

To validate your formula while building it, click **VALIDATE**. This prompts the following to occur:

1. The formula is checked for syntax errors.
2. If the validation fails, an error message displays with the reason and suggestions for correcting the formula.
3. If the validation succeeds, a "Success" message displays.

Click **SAVE** to save the field. If you have not yet validated your formula, the validation process will occur when you click **SAVE**.

## Edit, Copy, or Delete Calculated Field

Users with permission to manage global calculated fields can edit, copy, or delete the fields they create. These options are available in both the My Fields section and the Global Fields section for users with this permission.

The **My Fields** and **Global Fields** sections are available in the Calculated Fields area of the Data panel in the **report builder**.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Manage Global Calculated Fields	<p>Grants the ability to publish calculated fields to all users. This permission cannot be constrained.</p> <p><b>Note:</b> <i>Calculated fields can be created by all users who have permission to create reports in Reporting 2.0. However, in order to publish the calculated field globally, a user needs permission to manage global calculated fields.</i></p>	Reporting

### Edit Calculated Field

To make changes to the field:

1. Hover over the menu to the right of the field in the My Fields section. A list of actions displays.
2. Click **Edit**. This opens the calculated fields builder.
3. Make any changes to any configuration.
4. Click **SAVE**.

The changes automatically appear for any users with whom the field is shared.

For global calculated fields, the changes appear automatically.

### Copy Calculated Field

Users with permission to manage global calculated fields can copy the fields they create. Users with access to a global field can copy the global field.

To copy a field:

1. Hover over the menu to the right of the field in the My Fields section. A list of actions displays.
2. Click **Copy**. This opens the calculated field builder, with all configurations copied.
3. Configure the field as desired.
4. Click **SAVE**.

Copying a field does not overwrite the existing field.



## Delete Calculated Field

To delete a field:

1. Hover over the menu to the right of the field in the My Fields section. A list of actions displays.
2. Click **Delete**. This opens a confirmation pop-up.
3. Click **CONFIRM** to delete the field. Or, click **CANCEL** to keep the field.

Deleted fields are:

- Removed from all reports in which the field has been used, even if the report is currently in use.
- Removed from the My Fields section for the field creator.
- Removed from the Global Fields section, if the field was published globally.

**Note:** *When running a report that includes a deleted calculated field, the report will still run. However, once it runs, the calculated field is automatically removed from the report.*

## View My Calculated Fields

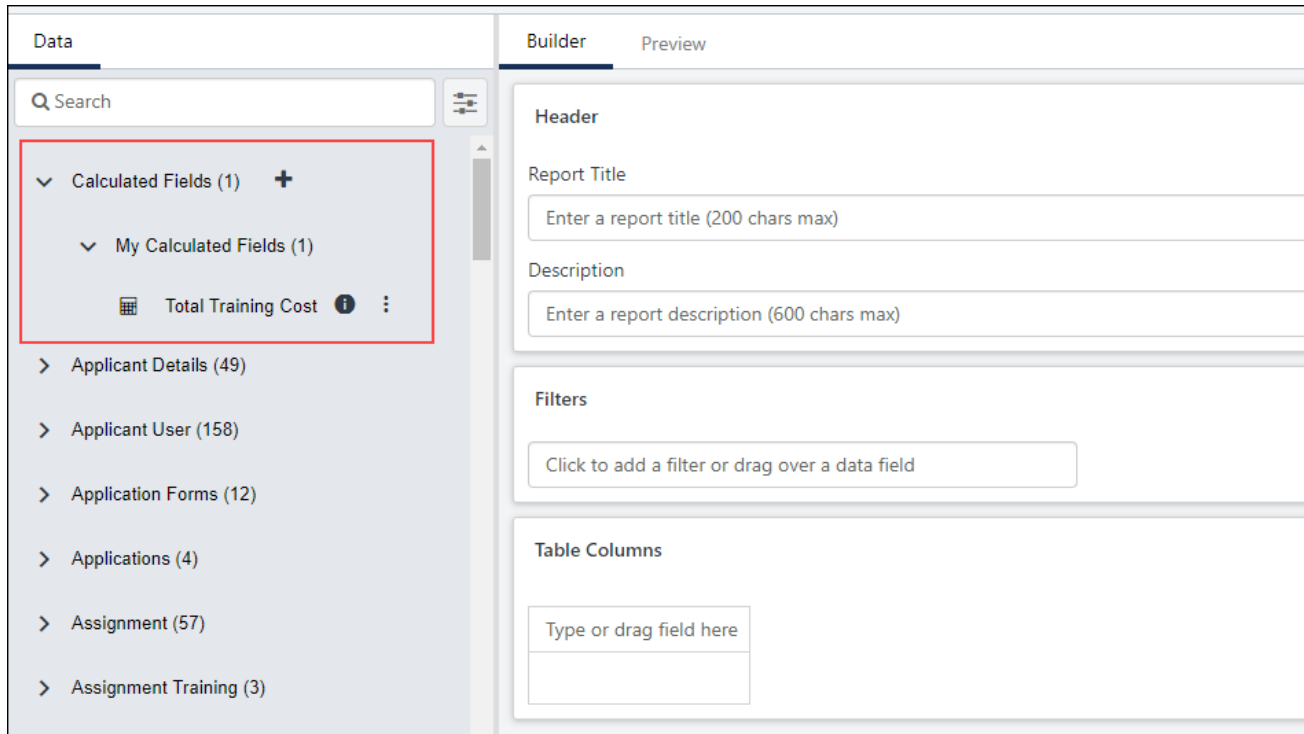
For users with permission to manage global calculated fields, you can view the calculated fields **you created** by going to Calculated Fields > My Fields in the Data panel on the **report builder**. This section is only visible to users who have created at least one calculated field.

The fields that display in the Calculated Fields section are only available to the type of report that is being created. For example, if the calculated field includes fields that are specific to Learning, then the field will not be available to use in a report that focuses on Recruiting.



For information about viewing global calculated fields, [See View Global Calculated Fields](#) on page 80 *for additional information*.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Manage Global Calculated Fields	<p>Grants the ability to publish calculated fields to all users. This permission cannot be constrained.</p> <p><b>Note:</b> <i>Calculated fields can be created by all users who have permission to create reports in Reporting 2.0. However, in order to publish the calculated field globally, a user needs permission to manage global calculated fields.</i></p>	Reporting



The My Fields section shows the following information for each field:

- Field type:
  - Date
  - Numeric
  - Text
  - Yes/No
- Field name
- Description when hovering over the information icon 
- Creator's name when hovering over the information icon 
- Globe icon to show a field has been published globally and is available in the **Global Fields** section
- Options to **edit, copy, or delete fields**

## View Global Calculated Fields

Global calculated fields are calculated fields that are created by the administrator and published to all users. The visibility of a global field is dependent upon a user's permissions and availability settings.

For information about viewing calculated fields you created, [See View My Calculated Fields](#) on page 78 *for additional information*.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Manage Global Calculated Fields	<p>Grants the ability to publish calculated fields to all users. This permission cannot be constrained.</p> <p><b>Note:</b> <i>Calculated fields can be created by all users who have permission to create reports in Reporting 2.0. However, in order to publish the calculated field globally, a user needs permission to manage global calculated fields.</i></p>	Reporting

### Visibility of Global Fields

Global fields must be published globally in order to be available in the Global Fields section. The visibility of these fields is controlled by a user's permissions and constraints related to the fields that were used to create the calculated field. If a user does not have permission to view the fields that were used in the calculated field, then the calculated field does not appear for the user in the Global Fields section.

In addition, the fields that display in this section are dependent upon the type of report that is being created. For example, if the calculated field includes fields specific to Learning, then the calculated field will not be available to use in a report that focuses on Recruiting.

### Use a Global Field in a Report

Users who can view a global field can include the field in a report in the same way that the field creator can include the field. This includes the following actions:

- Add as a field to the report
- Add as a filter
- Add as chart criteria
- Use in aggregation
- Use in summarizing a report
- Use in sorting a report

Users who do not have permission to manager global calculated fields cannot **edit or delete** the field, but they can **copy** the field.

## View Global Field Description and Creator

Users can hover over the tool-tip to the right of the field name to view the following:

- Field description
- Field creator's name
- Last edited by
- Time edited

## Options for Global Field Creator

The creator of a global field can **edit, copy, and delete** the field from within the Global Fields section.

- Editing a Global Field - When edited, the changes are updated for all users.
- Copying a Global Field - When copying a global field, the field appears in the creator's My Fields section and must be published globally in order to appear in the Global Fields section. Users who do not have permission to manage global calculated fields can copy the field.
- Deleting a Global Field - When deleted, the field is removed for all users. The field is also removed from all reports that include the field.

## Shared Reports with Calculated Fields

Reports that include calculated fields can be shared. The field appears in the report table and can be seen by all shared users, regardless of whether the field is a **global field**.

However, the following rules apply to the visibility of calculated field data in the report:

1. Users can only view calculated field data if they have permission to view the standard or custom report fields that are used in the calculated field.
2. Users can only view the calculated field data that is within their permission constraints.

Shared users can remove a calculated field from the report, even if the field is not a global field.

Calculated fields that are not global fields are **not** visible to shared users in the **Calculated Fields > My Fields** section.

## Engage

## Engage Lite

Cornerstone's Engage product lets administrators create and schedule recurring, continuous feedback campaigns to capture satisfaction and engagement feedback from employees to foster a productive workplace. Administrators can create and launch surveys and view survey results.

With this release, Cornerstone launches Engage Lite, a free offering that provides preconfigured surveys that clients can use to understand how their employees are feeling during a crisis. Any Cornerstone client can use Engage Lite, even those who have not previously purchased Performance or Engage products.

Engage Lite's Wellness Package provides the following ready-to-launch surveys:

- Employee Wellness Check - A simple survey to gauge current sentiment and identify those groups or individuals who might need support in this difficult time. The survey question is: How are you feeling today?
- Employee Work Check - A simple survey to gauge current sentiment and identify those groups or individuals who might need support in this difficult time. The survey question is: How is work today?

**Note:** These surveys cannot be edited.

To access the Engage Lite Wellness Package surveys:

- If you have Engage Lite only, go to [ADMIN > TOOLS > ENGAGE MANAGEMENT > MANAGE CAMPAIGNS](#).
- If you have the base Engage product, go to [ADMIN > TOOLS > ENGAGE MANAGEMENT > SURVEYS](#) to access these surveys in the Engage Library.

The screenshot shows the 'Active Campaigns' section of the Engage interface. It contains two cards for surveys:

- Employee Work Check (Draft):**
  - Owner: Cornerstone Administrator
  - Key Dimension: Satisfaction
  - Distribution: Email link, Mobile, Action Item
  - Invited Participants: 0
  - Completion Rate: 0%
  - Recurring: Weekly
  - Status: Draft (indicated by a pencil icon)
  - Start Date: N/A, Close Date: N/A
  - Action: Edit Campaign
- Employee Wellness Check (Active):**
  - Owner: Cornerstone Administrator
  - Key Dimension: Satisfaction
  - Distribution: Email link, Mobile, Action Item
  - Invited Participants: 180
  - Completion Rate: 0%
  - Recurring: Weekly
  - Status: Active (indicated by an upward arrow icon)
  - Start Date: May 21, 2020, Close Date: Jun 30, 2020
  - Action: Edit Campaign

The selected survey can be associated with a feedback campaign and sent to users. [See Manage Campaigns.](#)

Additionally, organizations can use the Campaign Dashboard to see a high-level view of the survey results. [See Campaign Dashboard.](#)



## How Does This Enhancement Benefit My Organization?

Engage Lite allows organizations to quickly gain valuable insight about their employee's well-being by leveraging a survey tool that is integrated with Cornerstone instead of using an outside survey tool. Save time setting up and configuring a pulse survey campaign by running this simple tool.

## Considerations

- Engage Lite is available for use between June 5, 2020 and December 31, 2020 only.
- Engage Lite clients are restricted to launching surveys, completing surveys, and viewing survey results.
- Engage Lite surveys are active by default.
- Engage Lite surveys cannot be edited.

## Implementation

- A Cornerstone administrator must enable Engage Lite in Engage Management. After Engage Lite is enabled, please wait an hour for full enablement. To enable Engage Lite, go to [ADMIN > TOOLS > ENGAGE MANAGEMENT > ENGAGE LITE > ENGAGE LITE ENABLEMENT](#). Push the toggle to the on position.
- Clients who have the base Engage product can access the Engage Lite surveys in the Engage Library.
- Engage Lite is available to all Cornerstone clients who have a Cornerstone portal.

## Permissions

The following existing permission applies to this functionality.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Engage - Administration	Grants access to both the reporting and campaign dashboards in Engage. This permission also grants access to the Engage Library where administrators can create the components of an Engage campaign. This is an administrator permission. This permission cannot be constrained.	Engage - Administration

## Learning

## Cornerstone Learn - Apple Human Interface Guidelines UI Enhancements (iOS)

## Cornerstone Learn - Apple Human Interface Guidelines UI Enhancements (iOS)

Key design principles from Apple's Human Interface Guidelines (HIG) have been applied to enhance the user experience and modernize the Learn app for iOS users. With this enhancement, Cornerstone has enabled the following:

- Apple's built-in system fonts
- Dynamic type sizes
- Multi-tasking functionality for iPad users
- iOS standard navigation bar
- Replaced the navigation menu with links
- Picture in Picture (PIP) functionality for iPads (available with the July 17 patch)

### Implementation

These enhancements are enabled by default for the iOS version of the Learn app after users upgrade to the latest version of the app from the Apple App Store.

## Learn App - iOS User Interface Enhancements

The following additions and updates have been made to the user interface (UI) of the iOS version of the Cornerstone Learn app:

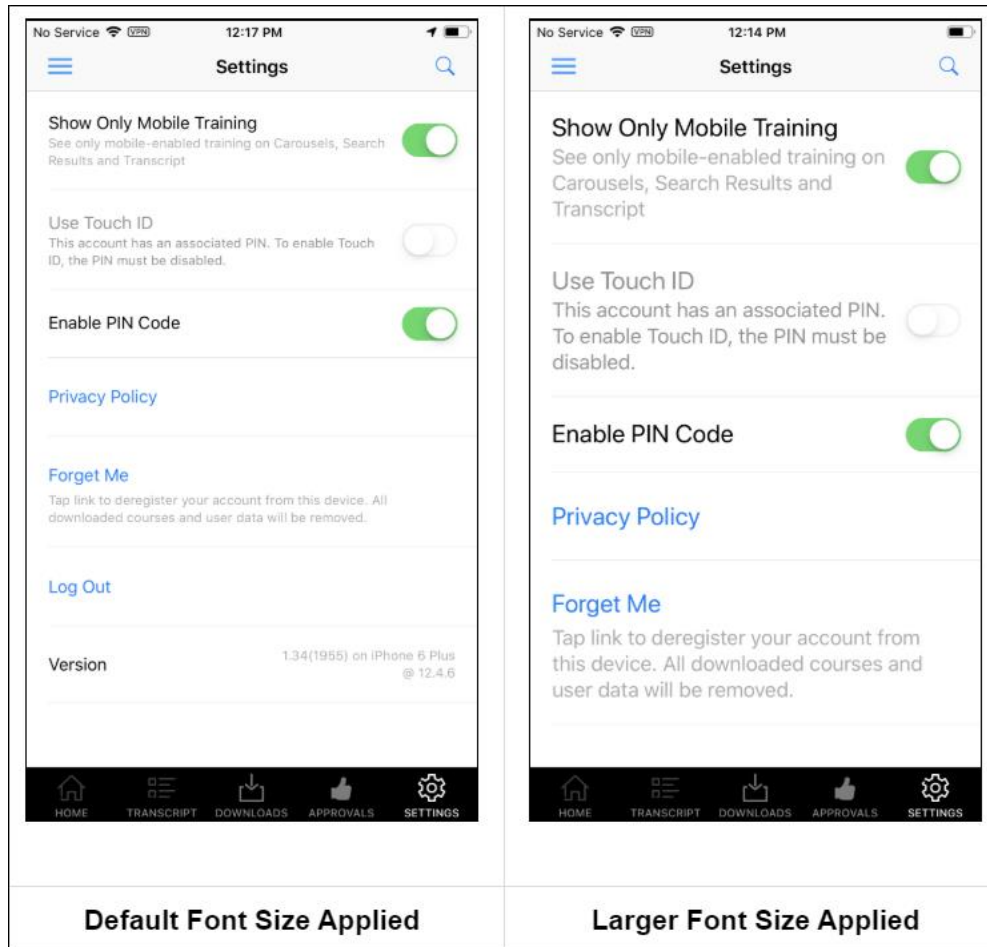
- Built-in system fonts
- Dynamic type sizes
- Multitasking
- iOS standard navigation bar
- Links menu
- Picture in Picture (PIP) functionality (available with the July 17th patch)

### Built-in System Fonts

The Learn app has implemented Apple's built-in fonts, which the app to apply the same size classes, font types, and colors consistently throughout the application. It also enables the application to support Dynamic Size Types, allowing users who utilize large text or bold text on their iOS device to see these text changes in the Learn App.

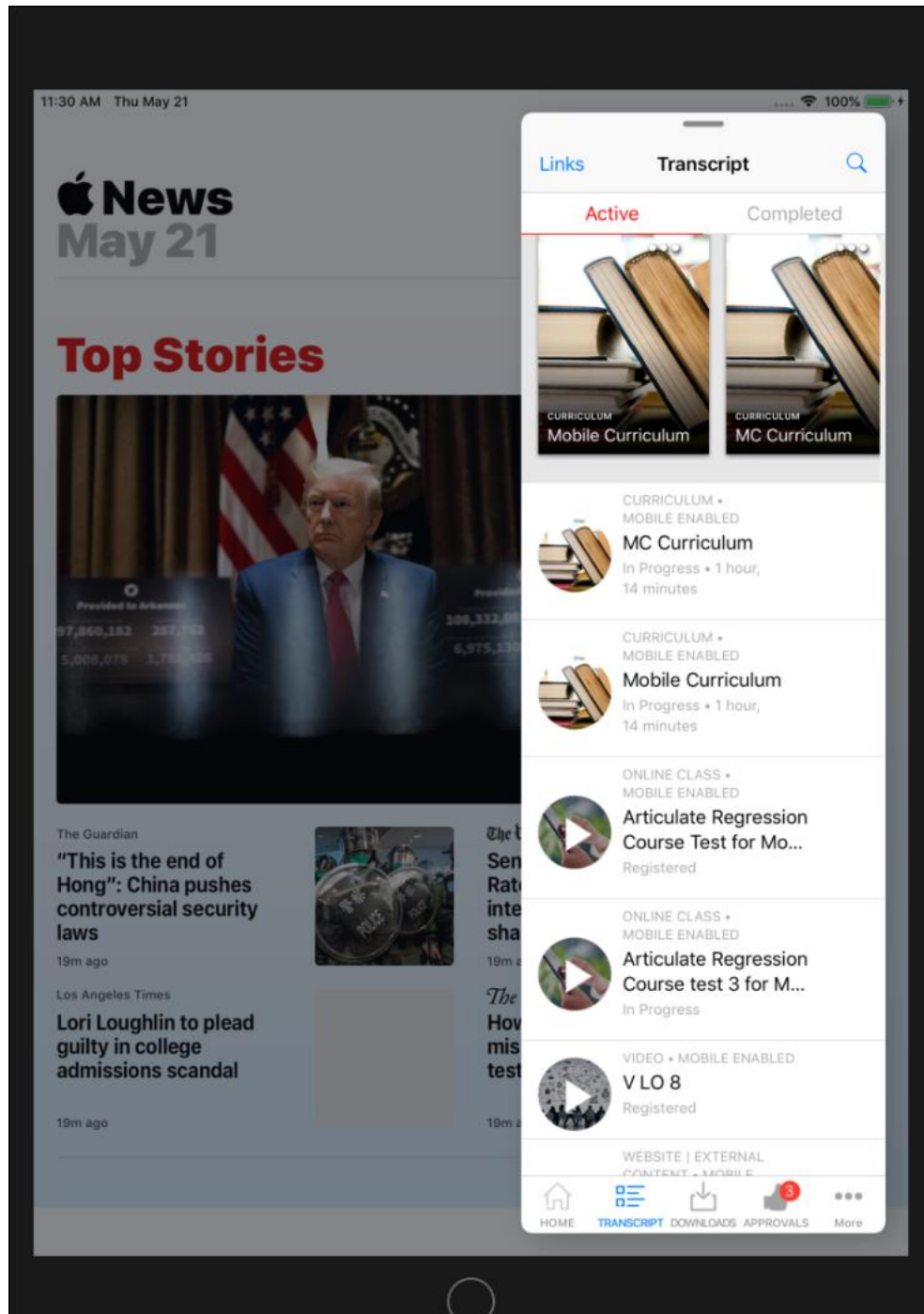
### Dynamic Type Sizes

The Learn app supports Dynamic Type, which provides additional flexibility by allowing app users to choose their preferred text size via their iOS device settings. The Learn app supports both larger accessibility text sizes and bold text.



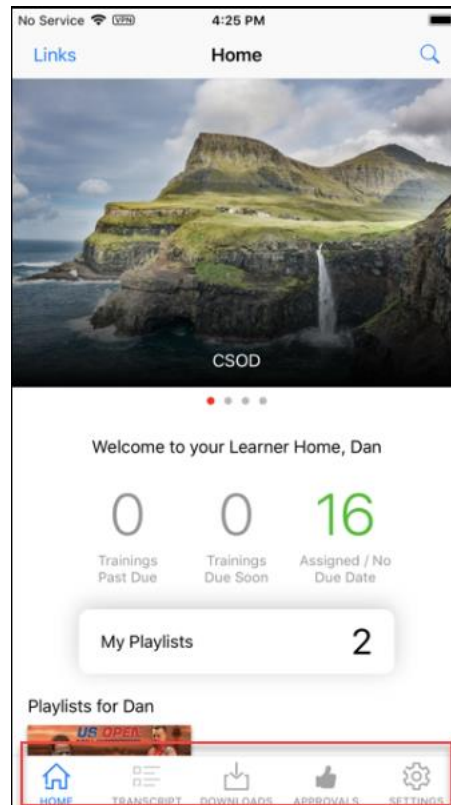
## Multitasking

Slide Over and Split View has been enabled for Learn app iPad users, allowing users to use the Learn app simultaneously with other applications that support the same features.



### iOS Standard Navigation Bar

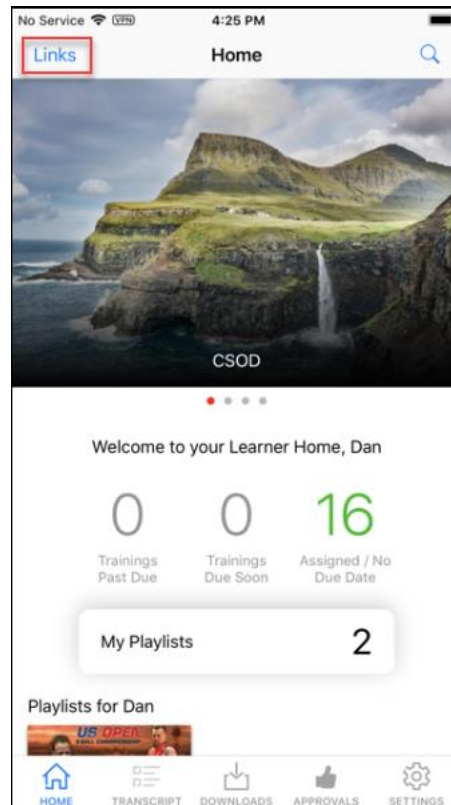
To ensure the bottom navigation bar of the app meets color contrast requirements, iOS' default navigation bar control has been implemented for the Learn app. With this enhancement, the navigation bar is light gray, unselected icons are dark gray, and the selected icon is blue, matching the tint color of all other tappable elements within the application.



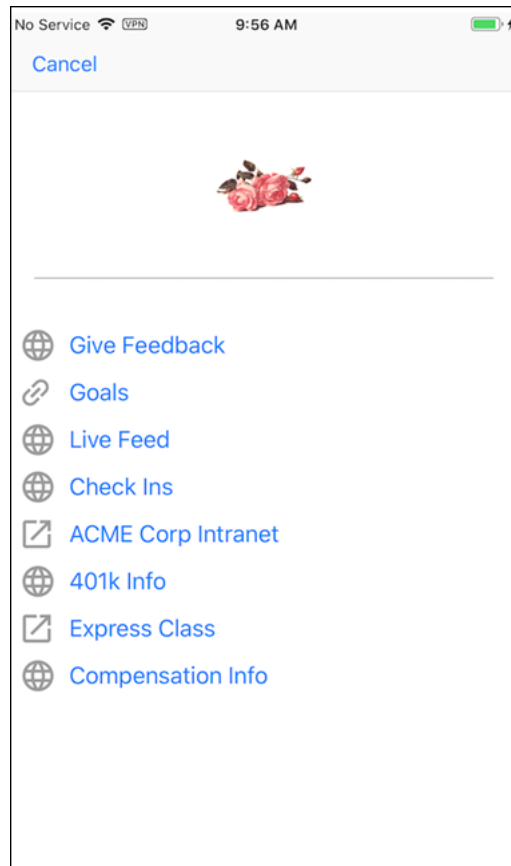
## Links Menu

The navigation menu icon has been updated to a **Links** link.





When tapped, the **Links** link opens a tableview of any configured custom links, in addition to the **Give Feedback** link.



### Picture in Picture (PIP) Functionality

With the July 17th patch, Picture in Picture (PIP) functionality will be made available for iPads. Users can initiate PIP when viewing a video learning object (LO). All Learn app functionality is disabled while PIP is active. Users can traverse other apps while the video LO continues to play in a small window. After exiting PIP mode, all app functionality is re-enabled.

## Needs - Continuing Medical Education Integration

## eeds - Continuing Medical Education Integration

Prior to this enhancement, healthcare organizations that actively use CME credits had to navigate between two different systems to view the full details of a learner's training and transcript.

With this enhancement, a new eeds integration is available, allowing organizations to view and track CME credits imported from eeds within learners' transcripts in the Cornerstone Learning Management System (LMS). Using this integration, learners and learning administrators are able to search, find, and confirm CME credits on the learner's transcript.

### Use Case

ACME Hospital schedules a weekly session of Cardiology Grand Rounds. Dr. Smith would like to see the upcoming schedule, so she searches for Cardiology Grand Rounds in the Cornerstone LMS, finds the event, and clicks a link in the description to see the schedule for the event.

On May 8th, Dr. Smith is able to sign into the Cardiology Grand Rounds session via the eeds app or on the website. After she completes the various requirements for the course, such as an evaluation and post-test, the attendance data is sent to the Cornerstone LMS.

Dr. Smith logs into the LMS the next day and can view her transcript with the TEDMED event information. She can also view her certificate by clicking on the **eeds Certificate** link in the training details for the event. With the help of the eeds integration, Dr. Smith is able to take training, view training details, and complete associated actions all through one system.

### Exclusions

The following exceptions apply to the eeds integration:

- CME/CEU credits will not be aggregated. If an organization needs a sum of the CME/CEU credits, they must go to eeds-CME via the certificate link or access a training report via the LMS and export to excel.
- Training hours, which refers to the actual hours and minutes of an event, appears on the user's transcript and will be aggregated with other learning objects (LOs).
- Historical data is not reflected on the transcript. eeds-CME will be the sole system of record for historical (i.e. pre-integration) data. **Note:** *eeds-CME can send historical data as an add-on.*

### Implementation

For organizations using the Learning module, the eeds integration is available for an additional cost. To purchase this integration, contact your Cornerstone representative and have it enabled via a case with Global Product Support (GPS). After the integration has been enabled, you will need to configure it by following the steps outlined in the Enablement Guide: [Click here to access the Enablement Guide for the eeds integration.](#)

### Permissions

The following existing permissions apply to this functionality:

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

	permission can be constrained by OU, User's OU, and Provider. The constraints on this permission determine which materials the administrator is able to view, edit, copy, and create. This is an administrator permission.	
Training Custom Fields	Grants ability to create and edit custom fields to be used for one or more learning object types. This is an administrator permission.	Learning - Administration

## Learning Details Redesign (Early Adopter) – Ability to Control Data Display

## Learning Details Redesign (Early Adopter) - Ability to Control Data Display

With this enhancement, the Learning Details Preferences page has been updated to be responsive and allow administrators to control visibility of the metadata that displays on the Learning Details page, such as Available Languages, Subjects, Provider, and more.

**This enhancement has been delayed and this functionality is not currently available in any environment.**

### Implementation

This enhancement is automatically applied to all portals using the Learning module.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Details Preferences	Grants ability to manage Learning Details preferences via the Learning Details Preferences page. This is an administrator permission.	Learning - Administration



## Learning Details Preferences - Page Display

**This enhancement has been delayed and this functionality is not currently available in any environment.**

The Learning Details Preferences page allows administrators to configure preferences for the redesigned Learning Details page. With this enhancement, in addition to determining which training types the Learning Details page is available for, administrators can also customize the types of metadata that display to users on the Learning Details page.

To configure Learning Details Preferences, go to: [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES](#) and click the **Learning Details Preferences** link. These preferences are set by division, so choose a division for which to configure preferences. Visibility of metadata is configured on the new Page Display tab of the Learning Details Preferences page.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Details Preferences	Grants ability to manage Learning Details preferences.	Learning - Administration

Home > Tools > Learning > Learning Preferences > Learning Details Preferences

## Learning Details Preferences

Page Display

Page Enablement

### Learning Object Metadata Visibility

Toggle on to display the metadata on the Learning Details page for all Learning Objects

- ☐ Available Languages
- ☒ Credits
- ☐ Is Mobile
- ☐ Last Updated Date
- ☐ Points
- ☒ Price And Training Units
- ☒ Only Display When Value is Greater than Zero
- ☒ Provider
- ☐ Recommended Training
- ☒ Resources
- ☐ Subjects
- ☐ Training Custom Fields
- ☐ Training Equivalencies
- ☐ Training Type
- ☐ Version Number

### Page Section Visibility

Toggle on to display section(s) on the Learning Details page for all Learning Objects

- ☒ Related Learning Section

### Overwrite custom settings for all child Divisions

☐ To apply new options, you must reset all of the subordinate Division's preferences. If this is not checked, the preferences for child Divisions that were set in the past will remain the same.

Cancel Save Changes

### Learning Object Metadata Visibility

In the Learning Object Metadata Visibility section, administrators can specify which metadata displays on the Learning Details page for training items in their system. To enable or disable a metadata type, toggle the switch next to the metadata type to the On position. To disable a metadata type, toggle the switch to the Off position. The following metadata types can be enabled and disabled from this page:

- Available Languages
- Credits
- Is Mobile
- Last Updated Date
- Points
- Price and Training Units
- Provider
- Recommended Training
- Resources
- Subjects
- Training Custom Fields
- Training Equivalencies
- Training Type

- Version Number

#### Page Section Visibility

In the Page Section Visibility section, administrators can enable and disable the Related Learning section on the Learning Details page. The Related Learning carousel, powered by machine learning, displays at the bottom of the Learning Details page, providing users with quick access to training related to the training item for which they are currently viewing the Learning Details page.

To enable the Related Learning section, toggle the switch to the On position. To disable the Related Learning section, toggle the switch to the Off position.

#### Overwrite Settings

Choose whether to overwrite custom settings for child division OUs. If you choose to overwrite custom settings for child division OUs, the selected settings are applied to both new and existing child OUs. Any previously customized child OUs are updated with the selected settings.

If this option is unselected, then only the child OUs that do not have customized settings will be updated, as well as any OUs that are added in the future.

A child OU that has not been customized always inherits from the parent, regardless of whether this option is selected.

An OU is considered customized if its preferences or settings have been changed.

#### Save

To save any changes you have made to the Learning Details Preferences page, click the **SAVE CHANGES** button at the top of the page. To leave the page without saving any changes, you can click the **CANCEL** button.

## "Price Visible" Preference Moved to Learning Details Preferences

## Price Visible Preference Moved to Learning Details Preferences

With this enhancement, the **Price and Training Units** visibility setting has been moved from the Content Requesting Preferences page to the new Page Display section of the Learning Details Preferences page. This setting still controls price visibility on both the legacy and redesigned Learning Details pages. In addition, an **Only Display when Value is Greater than Zero** sub-option is available, allowing administrators to determine whether a price displays for training items with no cost.

### Implementation

This enhancement is automatically applied to all portals using the Learning module. The Price and Training Units option and the **Only Display when Value is Greater than Zero** option are both enabled by default.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Details Preferences	Grants ability to manage Learning Details preferences via the Learning Details Preferences page. This is an administrator permission.	Learning - Administration

## Learning Details Preferences - Price and Training Units

The relocated **Price and Training Units** setting is now available in the Page Display tab of the Learning Details Preferences page.

To configure Learning Details Preferences, go to: [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES](#) and click the **Learning Details Preferences** link. These preferences are set by division, so choose a division for which to configure preferences.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Details Preferences	Grants ability to manage Learning Details preferences.	Learning - Administration

Learning Details Preferences

Page Display

Page Enablement

### Learning Object Metadata Visibility

Toggle on to display the metadata on the Learning Details page for all Learning Objects

- ☐ Available Languages
- ☒ Credits
- ☐ Is Mobile
- ☐ Last Updated Date
- ☐ Points
- ☒ Price And Training Units
- ☒ Only Display When Value is Greater than Zero
- ☒ Provider
- ☐ Recommended Training
- ☒ Resources
- ☐ Subjects
- ☐ Training Custom Fields
- ☐ Training Equivalencies
- ☐ Training Type
- ☐ Version Number

### Page Section Visibility

Toggle on to display section(s) on the Learning Details page for all Learning Objects

- ☒ Related Learning Section

### Overwrite custom settings for all child Divisions

☐ To apply new options, you must reset all of the subordinate Division's preferences. If this is not checked, the preferences for child Divisions that were set in the past will remain the same.

Cancel Save Changes

## Price and Training Units

To allow prices and training unit prices to display for training items on the Learning Details page (both the legacy and new version), toggle the **Price and Training Units** switch in the

Learning Object Metadata Visibility section of the Page Display tab to the On position. When the **Price and Training Units** option is enabled, a sub-option becomes available:

- Toggle the **Only Display when Value is Greater than Zero** switch to the On position if you only want prices to display for training on the Learning Details page if the price is greater than zero. If this option is not enabled, a price of 0 will display for training items with no cost.

**Note:** *Both these options are enabled by default, meaning that by default, prices will display for all training items with a price of more than zero.*

To save any changes made to the Learning Details Preferences page, click the **SAVE CHANGES** button.

For more information about Learning Details Preferences: [See Learning Details Preferences](#).

## Withdraw from Session Email Tag Added to "Session Start Date" Email



## Email Tag - Withdraw from Session - Expanded

Prior to this enhancement, if a learner wanted to withdraw from an instructor-led training (ILT) session, it was necessary for the learner to log into the system, navigate to their transcript, search for the session, and then manually withdraw. Some users erroneously thought that if they declined the email invitation for the session, they would be automatically withdrawn, leading to confusion.

With this enhancement, a new WITHDRAW.SESSION.LINK email tag is available for Session Start Date emails. The WITHDRAW.SESSION.LINK tag is SSO enabled but is also available for non-SSO enabled portals. This tag displays as a link in the email, and if the user clicks the link, they are navigated to the Cancel Registration page of the selected event. The learner then only needs to select a reason for their withdrawal. This new tag allows administrators to save their users time and deliver a better ILT user experience.

### Implementation

This functionality is automatically available in all portals using the Learning module.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

## Session Start Date Email - Withdraw Link Tag

The WITHDRAW.SESSION.LINK email tag can be added to Session Start Date emails via Email Administration. The Session Start Date email acts as a reminder email sent to learners for the upcoming sessions.

To add a tag to a Session Start Date email, go to: [ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT](#). Search for the Session Start Date action and click the Add Email icon next to the action.

### Permission

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Tags are replaced with the corresponding values when emails are sent.

**Tags**

Display a list of tags that can be used within the subject and body of the e-mail

**Subject (English (US))**

Language **English (US)**
☒ HTML ☐ Plain Text

A Verdana 10pt Normal Zoom

B I U abc

Dear TRAINEE.FIRST.NAME TRAINEE.LAST.NAME: You are scheduled for the following training item which began 15 minutes ago. Training Title: TITLE Session or Online Class Number: TRAINING NUMBER Training Type: TRAINING TYPE Description: TRAINING.DESCRPTION Start Date: SESSION.START.DATE SESSION.START.TIME Session Duration: DURATION

To withdraw from this session, click here: WITHDRAW.SESSION.LINK

Design HTML Preview

Words: 46 Characters: 394

Cancel Save



## Recruiting

## Assessment Connector - Redirect URL

With this enhancement, a **Supports RedirectUrl** field is added to the Settings page for the Assessment Connector integration, as well as for the following additional integrations:

- pymetrics Talent Management and Screening
- SHL Talent Assessments
- Talent Plus TalentBank Integration

When this field is toggled to on, candidates are redirected to the assessment in the same tab as the application workflow.

Once they complete the assessment:

- If they took the assessment from within the application workflow, then they are rerouted back to the last place they were in the application.
- If they took the assessment by launching it from their My Profile page in the career site, then they are rerouted back to their profile page.

Back Assessment Connector Patch

Uninstall and Remove Integration

Settings Transaction History Getting Started

Please fill in the fields below to configure your integration.

Setup Instructions

Callback Access Key

PW9totT67fiz87tNMor2yoncF/M=

Username \*

Password \*

Base Service URL \*

\*\*\*Supports RedirectUrl\*\*\*

## Implementation

The assessment vendor will need to be able to support this functionality in order for the **Supports RedirectUrl** field to be functional. See documentation in Edge about this integration for details on vendor implementation.

This integration is available via an Assessment Connector in the **Edge Marketplace** for all organizations using the Recruiting suite and that also have an account with pymetrics Talent Management and Screening, SHL Talent Assessments, or Talent Plus TalentBank Integration.

Additional instructions for enabling and configuring the integration are available on the [Setup tab of the integration in Edge](#).

## Permissions

The following existing permissions apply to this functionality:

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

## 26 June Patch Release Functionality

## What's New for the 26 June 2020 Patch Release

The following is released along with the 26 June 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Core	Edge Import Learning Load Enhancements	<p>With this enhancement, organizations can now have an instructor associated with multiple providers or vendors in a single instructor load file. This is achieved by listing multiple providers or vendors separated by a semicolon.</p> <p>With this enhancement, the Online Course and the Online Course Transcript loads are enhanced to support xAPI courses.</p> <ul style="list-style-type: none"> <li>○ The Online Course load is enhanced to allow organizations to update the metadata of xAPI courses that already exist in the portal.</li> <li>○ The Online Course Transcript load is enhanced to allow organizations to import transcript updates for xAPI courses.</li> <li>○ The Online Course Transcript Custom Field load is enhanced to accept xAPI course ID/LOIDs.</li> </ul>
Core	Kronos WFR Core Data Inbound Integration - Support for Jobs (HR) Cost Center	<p>With this enhancement, organizations using the Kronos Workforce Ready (WFR) Core Data Inbound Integration in Edge can pass their Kronos Jobs (HR) cost center data into Cornerstone via the integration. The Jobs (HR) cost center data is passed into Cornerstone as organizational unit (OU) data. The Jobs (HR) cost center can be mapped to a standard or custom OU in Cornerstone.</p> <p>If the Visible checkbox for the Jobs (HR) cost center is NOT selected, then the corresponding OU type in Cornerstone is deactivated.</p>
Cornerstone HR	e-days Absence Management Integration Enhancements	<p>The following enhancements are now available for the "e-days Absence Management Integration" in Edge:</p> <ul style="list-style-type: none"> <li>○ Syncing of custom OU type data to e-days is now supported.</li> <li>○ A new log is added to the email notification which lists the records that have been processed through the integration.</li> </ul>



MODULE	FEATURE	DESCRIPTION
		<ul style="list-style-type: none"> <li>○ The modified settings page layout is updated for ease-of-use.</li> </ul>
Recruiting	Updated Voluntary Self-Identification of Disability Compliance Question	<p>With this enhancement, the "Voluntary Self-Identification of Disability" compliance question is updated to the new expiration date of 31 May 2023. This update is made in the <b>Compliance Question Bank</b> and is also updated for <b>Compliance Enablement Preferences</b>.</p>

## Core

## Edge Import Learning Load Enhancements

### Instructor Load Enhancement

Prior to this enhancement, organizations could not easily associate an instructor with multiple providers or vendors. To achieve this, organizations were required to create one file per instructor/vendor association, which also required multiple load attempts.

With this enhancement, organizations can now have an instructor associated with multiple providers or vendors in a single instructor load file. This is achieved by listing multiple providers or vendors separated by a semicolon.

### Online Course and Online Course Transcript Load Enhancement

With this enhancement, the Online Course and the Online Course Transcript loads are enhanced to support xAPI courses.

- The Online Course load is enhanced to allow organizations to update the metadata of xAPI courses that already exist in the portal.
- The Online Course Transcript load is enhanced to allow organizations to import transcript updates for xAPI courses.
- The Online Course Transcript Custom Field load is enhanced to accept xAPI course ID/LOIDs.

SCORM 1.2, SCORM 2004, and AICC courses continue to be supported by these load types.

### Implementation

This functionality is automatically enabled for all organizations using the Instructor, Online Course, or Online Course Transcript loads within Edge Import.

## Kronos WFR Core Data Inbound Integration - Support for Jobs (HR) Cost Center

With this enhancement, organizations using the Kronos Workforce Ready (WFR) Core Data Inbound Integration in Edge can pass their Kronos Jobs (HR) cost center data into Cornerstone via the integration. The Jobs (HR) cost center data is passed into Cornerstone as organizational unit (OU) data. The Jobs (HR) cost center can be mapped to a standard or custom OU in Cornerstone.

If the Visible checkbox for the Jobs (HR) cost center is NOT selected, then the corresponding OU type in Cornerstone is deactivated.

[See Kronos Workforce Ready Core Data Inbound Integration.](#)

### Implementation

This enhancement is automatically enabled for organizations that are using the integration.

This integration is available for self-activation via the Kronos Workforce Ready Core Data Inbound Integration tile in Edge Marketplace. This integration is for organizations that use Kronos Workforce Ready as a source of HR data. Once the integration is available, please refer to the Kronos Workforce Ready Core Data Inbound Integration Starter Guide document under the Getting Started tab for details on how to enable the integration in your portal. There is no additional cost for this integration.

### Permissions

The following 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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Cornerstone HR

## Cornerstone HR - e-days Absence Management Integration Enhancements

With this release, the e-days Absence Management Integration in Edge has been updated to improve usability and logging.

The following enhancements are now available:

- An updated Settings page that contains:
  - A new Custom OU sync section that administrators can use to select which custom OU type(s) are sent to e-days.
  - A new Standard OU sync section in a table format instead of a list type layout. Administrators can use this table to select which standard OU type(s) are sent to e-days.
- A new log is added to the email notification which lists the records that have been created/updated in e-days and those that errored-out.

Additionally, administrators can define user custom fields and use them to filter out users from being updated or created in e-days. *This enhancement is available in a later release.*

To install a new e-days Absence Management Integration, go to [ADMIN > TOOLS > EDGE > MARKETPLACE > E-DAYS ABSENCE MANAGEMENT INTEGRATION](#).

To configure the e-days Absence Management Integration, go to [ADMIN > TOOLS > EDGE > INTEGRATIONS > E-DAYS ABSENCE MANAGEMENT INTEGRATION > SETTINGS](#).

### Implementation

- The e-days Absence Management Integration is on by default for HR clients using this integration in Edge.
- For new integrations, the e-days Absence Management Integration can be self-installed and enabled on the Edge Marketplace.
- For existing integrations that are enabled, the standard OU types configured on the Settings page will be enabled for the client. No action is required by clients.

## Recruiting

## Updated Voluntary Self-Identification of Disability Compliance Question

Prior to this enhancement, the "Voluntary Self-Identification of Disability" compliance question expired on 31 January 2020.

With this enhancement, the compliance question is updated to the new expiration date of 31 May 2023. This update is made in the [Compliance Question Bank](#) and is also updated for [Compliance Enablement Preferences](#).

**Question Preview** [X]

Language: English (US) ▼

Question:

**Voluntary Self-Identification of Disability**

Form CC-305  
OMB Control Number 1250-0005  
Expires 05/31/2023

Why are you being asked to complete this form?

We are a federal contractor or subcontractor required by law to provide equal employment opportunity to qualified people with disabilities. We are also required to measure our progress toward having at least 7% of our workforce be individuals with disabilities. To do this, we must ask applicants and employees if they have a disability or have ever had a disability. Because a person may become disabled at any time, we ask all of our employees to update their information at least every five years.

Identifying yourself as an individual with a disability is voluntary, and we hope that you will choose to do so. Your answer will be maintained confidentially and not be seen by selecting officials or anyone else involved in making personnel decisions. Completing the form will not negatively impact you in any way, regardless of whether you have self-identified in the past. For more information about this form or the equal employment obligations of federal contractors under Section 503 of the Rehabilitation Act, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at [www.dol.gov/ofccp](http://www.dol.gov/ofccp).

How do you know if you have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition. *Disabilities include, but are not limited to:*

- Autism

### Impact to Existing Application Workflows

The compliance question will be updated automatically and replaced on all workflows. You will not need to make this change manually on existing workflows.

### Impact to "Require OFCCP" Setting

When the **Require OFCCP Compliance functionality** setting is checked in Compliance Enablement Preferences, the updated "Voluntary Self-Identification of Disability" question will be included automatically.



## Implementation

This functionality is automatically enabled for all organizations using Recruiting.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compliance Enablement Preferences - Manage	Grants ability to access and manage Compliance Enablement Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
Compliance Question - Manage	Grants ability to access and manage Compliance Question Bank. This permission cannot be constrained. This is an administrator permission.	Recruiting Administration

# Careers

## Check-Ins

## Check-Ins Enhancements - Overview

With this release, the following Check-Ins enhancements are now available:

- Follow-Ups - All members of the meeting can create follow-up action items for a topic. [See Check-Ins - Follow-Ups](#) on page 132 *for additional information.*
- Home Page Customization - Administrators can customize the look and content on the check-Ins home page. [See Check-Ins - Customize the Home Page](#) on page 134 *for additional information.*
- Individual Notes - All participants in the meeting can enter individual notes for a topic. [See Check-Ins - Individual Notes](#) on page 138 *for additional information.*
- Checking In During Difficult Times - A new template designed to help managers and organization provide clear information and resources to help employees get through a crisis. [See Check-Ins Template – Checking In During Difficult Times](#) on page 140 *for additional information. This feature is available in Stage portals as of 21 April 2020.*
- Visibility to Upcoming Check-Ins - The Check-Ins dashboard now provides an additional tab for Upcoming Check-Ins. [See Check-Ins - Visibility to Upcoming Check-Ins](#) on page 130 *for additional information.*

## Implementation

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

## Permissions

The following permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self And Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. This is an end user permission.	Performance
Check-In Templates - Manage	Grants ability to manage Check-Ins Templates. This permission cannot be constrained. This is an administrator permission.	Performance
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows.	Core Administration

	This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

The following new permission applies to this functionality:

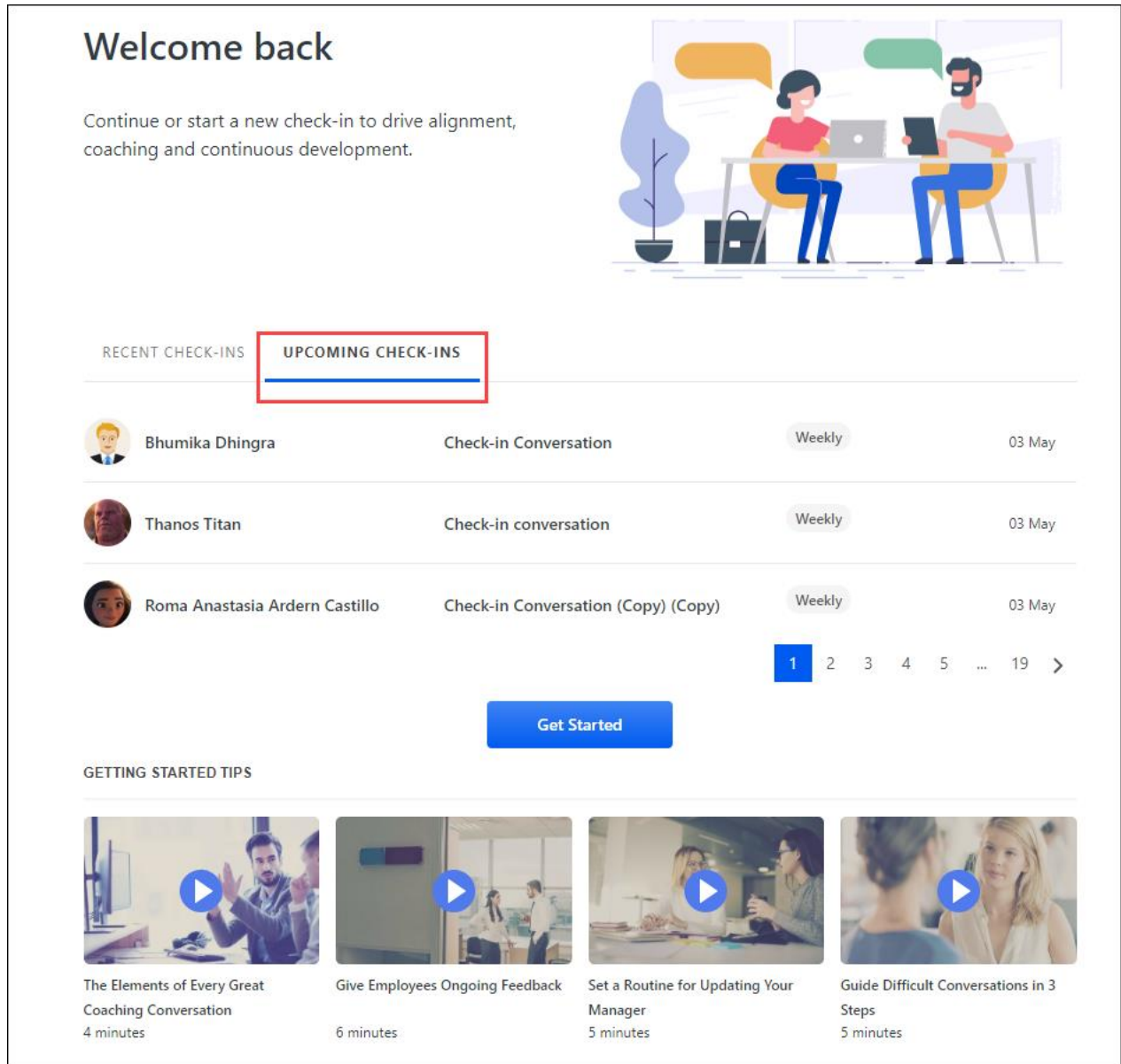
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Home Page Customization - Manage	Grants ability to manage the Check-Ins Home Page. This permission can be constrained by OU. This is an administrator permission.	Performance

## Check-Ins - Visibility to Upcoming Check-Ins

*This feature is targeted for a post-release patch.*

Before this enhancement, end users were only able to view their most recent Check-In discussions on the Check-Ins home page.

With this enhancement, end users can also view upcoming discussions on the Check-Ins home page.



## Implementation

This functionality is enabled for all clients using the Check-Ins feature.

## Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self And Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. This is an end user permission.	Performance

## Check-Ins - Follow-Ups

Check-Ins meeting participants can now use the meetings and topics page to create follow-up action items for a specific meeting.

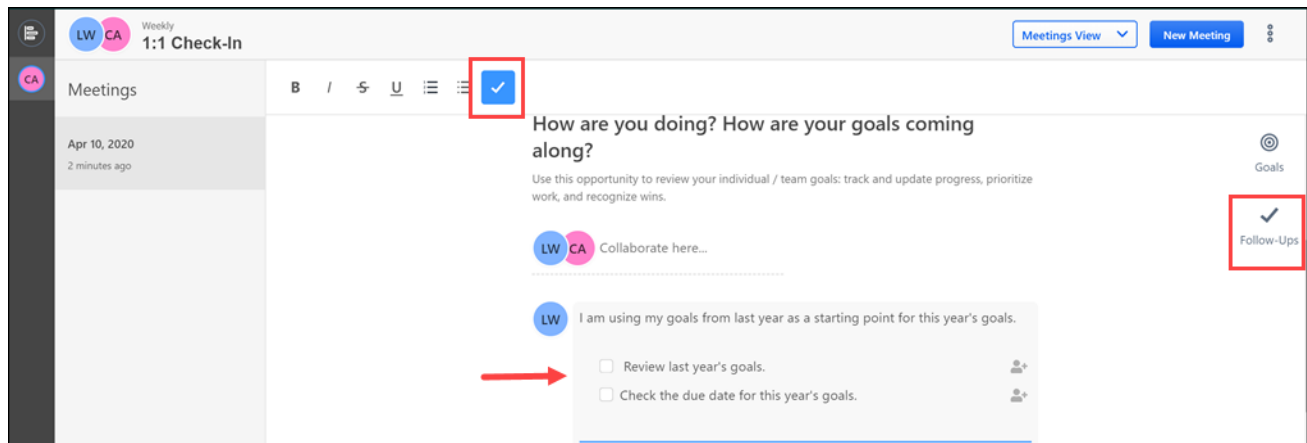
You can perform the following tasks for follow-ups:

- **Create follow-ups**
- **Assign a follow up to a user**
- **Change the follow-up status**
- **View a summary of follow-ups**

To view the meetings and topics page, go to [PERFORMANCE > CHECK-INS](#) and then click the appropriate check-in on your dashboard.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self And Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. This is an end user permission.	Performance



## Create Follow-Ups

1. Put the cursor in the area where you want to add a follow-up action item. For example, if you want to add a list of follow-up action items to an individual note, put your cursor in that area.
2. Type the first follow-up action item, and then click the check-mark box in the styles row. The action item appears with a check-box.



**Tip:** If you want to add another follow-up, hit enter and type your next action item.

### Assign Follow-Ups to a User

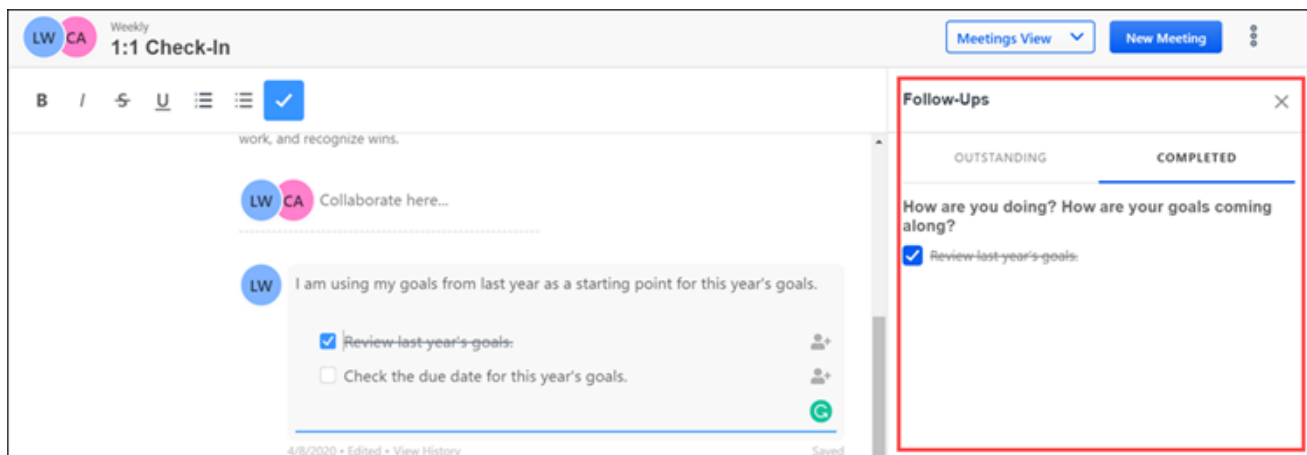
To assign a follow-up to yourself or another user in the meeting, hover over an action item, click the add icon, and select a user. The selected name appears after the follow-up. If configured, the selected user is notified that they are assigned a follow-up action item.

Once a user is assigned, their personal avatar is visible. *The avatar functionality is available in a later patch.*

### Change the Follow-Up status

To mark a follow-up complete, click its check-box. If a follow-up is not complete, its check-box is unchecked.

### View a Summary of Follow-Ups



Click the Follow-Ups icon to open the Follow-Ups flyout. Follow-Up items are listed by topic.

- Outstanding tab - Displays the follow-up items that are not completed. Click the item's check box to change it to completed status and move it to the Completed tab.
- Completed tab - Displays the completed follow-up items. Uncheck an item's checkbox to return it to not completed status and move it back to the Outstanding tab.

The Follow-Ups flyout is synced with the main topic display, so any action taken in either area is reflected in both areas.

## Check-Ins - Customize the Home Page

Check-Ins administrators can customize the look of the Check-Ins home page to accommodate an organization's brand and culture.

Administrators can perform the following tasks on this page:

- **Select an OU for a customized home page**
- **Customize a page for new or returning users**
- **Replace or hide the welcome content**
- **Hide the welcome graphic**
- **Replace or hide the instructional steps**
- **Change the text on the button**
- **Hide the Getting Started videos**
- **Localize content**

To open the administrator edit view, go to [ADMIN > PERFORMANCE MANAGEMENT](#) >. In the Check-Ins section, click Home Page Customization, and then select a division name.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Home Page Customization - Manage	Grants ability to manage the Check-Ins Home Page. This permission can be constrained by OU. This is an administrator permission.	Performance

## Customize Check-Ins Home Page

Change the look and feel of the home page for each Division or the organization.

Organizational Unit Selected:

**Cornerstone Administration** [Change](#)

☐ Overwrite custom settings for all children

Save

Cancel

NEW USER

RETURNING USER

Hide content ☐

### Get your check-in started today!

Check in with your manager or team to reach goals, review commitments, and drive continuous development.



Hide content ☐

#### STEP 1.

Create a check-in with anyone, anytime.

Frequent and structured check-ins using custom topics drive effective coaching.

#### STEP 2.

Prepare, document and follow up on your meetings.

Stay on top of your performance and development in a one stop shop.

#### STEP 3.

Keep an ongoing, two-way dialogue throughout the year.

Real-time feedback and regular check-ins achieve better performance and increase engagement.

Get Started

Hide content ☐

#### GETTING STARTED TIPS



The Elements of Every Great Coaching Conversation  
4 minutes



Give Employees Ongoing Feedback  
6 minutes



Set a Routine for Updating Your Manager  
5 minutes



Guide Difficult Conversations in 3 Steps  
5 minutes

## Organizational Unit Selected

1. In the Organizational Unit Selected area, click **Change**.
2. On the Home Page Customization page, select the appropriate OU.

**Overwrite the custom page settings for the associated child OUs:** Click **EDIT PAGE**, select **Overwrite custom settings for all children**, and then click **SAVE**.

The selected OU appears on the home page.

## New User/Returning User

- Click the New User tab to design a home page for first time users.
- Click the Returning User tab to design a home page for returning users. **Note:** *The Returning User tab contains a not-editable Recent Check-Ins section that does not appear on the New User tab.*

## Welcome Content

Administrators can replace the welcome messages or hide them completely.

- To replace the welcome messages, put the cursor in the message area and enter the appropriate changes.
- To hide the welcome messages, click **Hide content**.

## Welcome Image

Click **Hide content** in the image area to hide the welcome image.

## Instructions

Administrators can edit the check-ins tips or hide them completely.

- To replace the instructions, place the cursor in the appropriate area and make the changes.
- To hide the instructions, click **Hide content**.

## Button Name

The default name of this button will vary based on whether this page is for a new or returning user as follows:

- Default button name on the New User tab: **GET STARTED**
- Default button name on the Returning User tab: **CREATE A NEW CHECK-IN**

To change the button text, click the button to open edit mode. When you are done, click a blank area outside of the button to save your changes.

## Getting Started Tips

To hide the getting started videos, click **Hide content**.

## Localization

All of the text on the home page can be localized. To localize, in edit mode, click the localization globe and enter the appropriate text on the flyout.

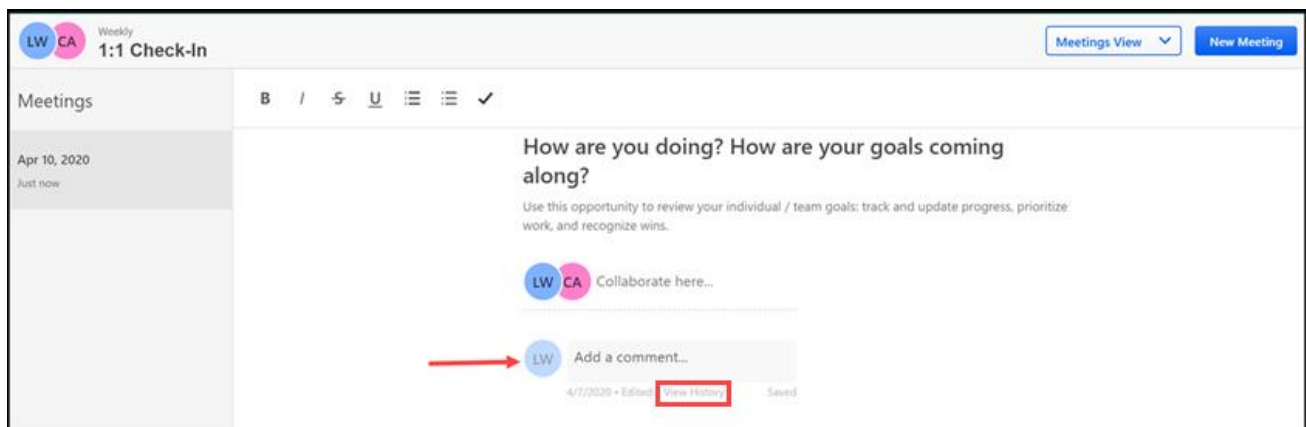
## Check-Ins - Individual Notes

Before this release, participants were only allowed to enter shared notes that could be modified or deleted by other meeting participants.

With this release, the meetings and topics page now provides a place for individual notes for all participants in the meeting. This ensures that everyone's voice is heard by capturing personal thoughts, ideas, or concerns. Individual notes can only be changed or deleted by the original writer.

Additionally, a View History link is now available to view changes for all shared or individual notes.

To view the Meetings page, go to [PERFORMANCE > CHECK-INS](#) and then click the appropriate check-in on your dashboard.



### Add an Individual Note

To add an individual note, scroll down to your personal identifier, click on the note line, and add your note.

### View History

To view all changes for individual or shared notes, click the **View History** link. A Edit History page opens. **Note:** *The Edit History view is only available if there are multiple edits.*

Edit History

LW

Create an action plan.

4/4/2020

LW

Comment Deleted

4/7/2020

LW

I am using my goals from last year as a starting point for this year's goals.

4/7/2020

LW

I am using my goals from last year as a starting point for this year's goals.


☐ Review last year's goals.

☐ Check the due date for this year's goals.

4/7/2020

LW

I am using my goals from last year as a starting point for this year's goals.

 [Review last year's goals.](#)

Close

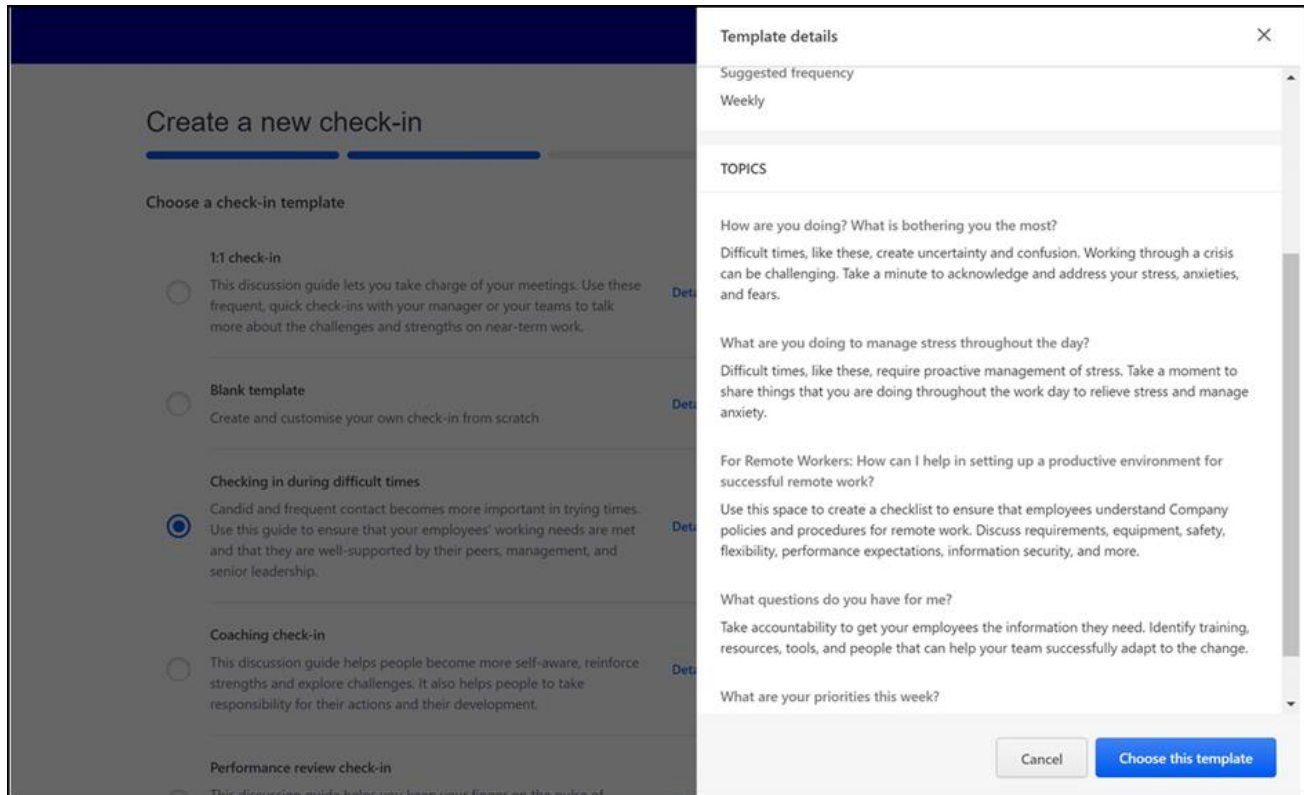
## Check-Ins Template – Checking In During Difficult Times

During difficult times, employees expect their managers and their organization to provide clear information and resources to help them get through a crisis.

With this enhancement, Check-Ins provides a new "Checking in during difficult times" template.

*This feature is available in Stage portals as of 21 April 2020.*

To view this template, go to [ADMIN > TOOLS > PERFORMANCE MANAGEMENT > CHECK-INS TEMPLATES](#).



## How Does This Enhancement Benefit My Organization?

Organizations can use this template as a "best practices" guide to help build trust and facilitate effective one-on-one discussions during difficult circumstances.

## Implementation

This template is disabled by default and must be enabled by an administrator. [See Check-Ins - Manage Templates](#).

## Permissions

The following permission applies to this functionality:

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



Check-In Templates - Manage	Grants ability to manage Check-Ins Templates. This permission cannot be constrained. This is an administrator permission.	Performance
--------------------------------	---------------------------------------------------------------------------------------------------------------------------	-------------

## Reporting Fields - Check-Ins

*This enhancement was originally released with the April 3, 2020 patch.*

With this enhancement, the fields available in the "Check-In Participant" field grouping are updated to be consistent with the fields available in the "Check-In Last Modified By" and "Check-In Creator" field groupings as follows:

- The Check-In Modifier alias is renamed to Check-In Last Modified By - This clarifies that the reported user will always be the last person who edited the Check-In. All other fields in this group remain unchanged.
- All User fields included in the Check-In Participant field grouping will be removed, except for User Full Name and User ID - This prevents unintended reporting on Check-In participants by someone other than the manager. With this change, the fields available in the "Check-In Participant" field grouping are consistent with the fields available in the "Check-In Last Modified By" and "Check-In Creator" field groupings.

## Development Plans

## Auto-Upgrade to Development Plans Redesign with the August 2020 Release

Cornerstone's legacy Development Plan module is scheduled for deprecation with the August '20 Release. Once deprecated, access to legacy Development Plans will no longer be available in client portals and all clients remaining on the legacy Development Plans module will be automatically upgraded to the Development Plans redesigned module. The Development Plans redesign has a full set of preferences to configure the user experience by Organizational Unit. During the auto-upgrade all preferences set in legacy plans will populate in the new preferences.

Clients do not need to wait until the August '20 Release to auto-upgrade to redesigned Development Plans. Clients are encouraged to auto-upgrade to the Development Plans redesign prior to the August '20 Release by self-activating via "Enable Redesigned Development Plans" in Corporate Preferences. [See Corporate Preferences.](#)

After the August '20 Release the Enable Redesigned Development Plans section will no longer be visible in Corporate Preferences as it will no longer be needed.

### Starter Guide

### Implementation

The Legacy Development Plan end-of-life is targeted for August 2020.

## Reporting Fields - Development Plans

As released with the 6 March 2020 patch release, Development Plan exception reports are available and include the following fields:

- Dev Plan Action Step
- Dev Plan Action Step Due Date
- Dev Plan Action Step Progress
- Dev Plan Activity Type
- Dev Plan Approval Date
- Dev Plan Category
- Dev Plan Date Created
- Dev Plan Description
- Dev Plan Due Date
- Dev Plan Is Primary
- Dev Plan Objective
- Dev Plan Objective Progress
- Dev Plan Progress
- Dev Plan Status
- Dev Plan Template Title at Plan Creation
- Dev Plan Title

To use exception filters for these reports, add the Exception Filters section to the Builder tab for the report. The exception filters are only available for the fields that apply to these report types. For more information about creating exception reports in Reporting 2.0, [see \*Exception Reporting\*](#).

The permissions needed to view the exception report filters are the same permissions needed to see the non-exception version of the reports. [See \*Permissions Reporting 2.0\*](#).

## Content Anytime

## Leadership and Management Subscription Refresh

Create stronger managers across your organization with leadership and management training focused on motivating and engaging employees in the modern workplace. With this subscription teach managers how to rally their employees around a shared vision, make high stakes decisions in the moment, cultivate a positive, outcomes-oriented culture, and develop the systems needed to effectively manage team priorities.

Leadership & Management subscribers will automatically receive the subscription refresh with the May '20 Release with the following additions:

- **New Grovo & Engagement Content**
  - Sponsorship - Help managers use their internal reputations to create advancement opportunities for more junior team members; how managers can help employees from non-majority groups get recognition and visibility.
- **New Content from EMEA Providers**
  - Cornerstone Content Anytime continues to expand offerings in French, German, and Spanish.
- **New Curriculum Blueprints** - Curriculum Blueprints are available for the Professional Skills, Leadership & Management, and Remote Work Essentials subscriptions. Curriculum Blueprints are designed to help learning administrators create meaningful learning experiences with their CCA subscriptions, helping to increase engagement and improve performance across key skill areas. Each blueprint includes guidance on which courses to include and in which order, supplemented with blended learning materials that help employees put new skills into practice, to create the most effective and engaging learning experience. For more information and to download the blueprints, click [here](#).

## Modern Compliance Subscription Refresh

Ensure compliance and minimize risk across your organization with content designed to target real behavior change and eliminate bias, harassment, injuries, data breaches, and more. With this subscription fulfill General HR Compliance legal requirements while helping employees recognize, examine, and address the behaviors that lead to breaches in safety, privacy, and ethics.

Modern Compliance subscribers will automatically receive the subscription refresh at the May '20 Release with the following additions:

- **New Content from EMEA Providers**
  - Cornerstone Content Anytime continues to expand offerings in French, German, and Spanish.



## Professional Skills Subscription Refresh

Build stronger communicators, strategic thinkers, and higher functioning teams across the organization with professional skills content focused on the business savvy skills that every employee needs. With this subscription teach employees how to communicate effectively—both internally and with customers—work well in teams, stay productive, and manage their own career development.

Professional Skills subscribers will automatically receive the subscription refresh at the May '20 Release with the following additions:

- **New IT & Operations Content**
  - Enable your technical staff to continue reskilling and help non-technical professionals expand into new skillsets relevant for their jobs. Over 130 courses added covering IT Processes, Coding, UX Design, and Software. 15 technical taxonomy topics now covered with courses on AWS, Python, CompTIA, and more.
- **New Grovo Content**
  - Open Mindedness - Help employees learn how to practice open mindedness so they can improve their work, as well as their problem-solving and collaboration skills.
  - Managing Complexity - Help learners navigate increasingly complex situations and solve problems amidst ambiguity.
  - Advancing Your Career - Help learners assert control over the direction of their careers by finding opportunities to advance and seeking new challenges to help develop areas of expertise.
- **New Content from EMEA Providers**
  - Cornerstone Content Anytime continues to expand offerings in French, German, and Spanish.
- **New Curriculum Blueprints** - Curriculum Blueprints are available for the Professional Skills, Leadership & Management, and Remote Work Essentials subscriptions. Curriculum Blueprints are designed to help learning administrators create meaningful learning experiences with their CCA subscriptions, helping to increase engagement and improve performance across key skill areas. Each blueprint includes guidance on which courses to include and in which order, supplemented with blended learning materials that help employees put new skills into practice, to create the most effective and engaging learning experience. For more information and to download the blueprints, click [here](#).

## Remote Work Essentials Subscription

The current crisis has dramatically shifted the way people work and the skills required to appropriately cope and manage remote teams. This new subscription provides content to help your employees adjust to working from home and manage their overall well-being. Topics include remote work best practices, communication tools, mental health, productivity, and leadership during times of change. The Remote Work Essentials subscription includes 730 courses in English, French, German, and Spanish.

Like all CCA subscriptions, Remote Work Essentials includes expertly curated libraries of modern content, including exclusive Cornerstone Originals and 20+ eLearning brands. Each subscription is regularly refreshed, mobile-ready, and seamlessly integrates into Cornerstone's LMS.

- **New Curriculum Blueprints** - Curriculum Blueprints are available for the Professional Skills, Leadership & Management, and Remote Work Essentials subscriptions. Curriculum Blueprints are designed to help learning administrators create meaningful learning experiences with their CCA subscriptions, helping to increase engagement and improve performance across key skill areas. Each blueprint includes guidance on which courses to include and in which order, supplemented with blended learning materials that help employees put new skills into practice, to create the most effective and engaging learning experience. For more information and to download the blueprints, click [here](#).

Please contact your Client Executive to learn more about this new Cornerstone Content Anytime subscription.

## Core/General

## Banner Core Data Inbound Integration

Cornerstone integrates with the Ellucian Banner platform to provide a seamless process for creating and updating users and OUs in Cornerstone. Banner will remain the system of record for User and OU data. This API based integration provides an automated data sync to simplify data management and eliminate duplicate data entry.

*This functionality was released with the 6 March 2020 patch.*

### Implementation

This integration is available for self-Activation via the Banner Core Data Inbound Integration tile in Edge Marketplace. This integration is for organizations that use Banner HR as a source of HR data. Once the integration is available, please refer to the Banner Core Data Inbound Integration Starter Guide document under the Getting Started tab for details on how to enable the integration in your portal. There is an annual cost of USD \$5,000 for this integration.

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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## Bulk API (User & OU)

## Bulk API (User & OU)

With this enhancement, a new Bulk API is available for user and organizational unit (OU) loads. Bulk APIs provide organizations the ability to leverage a highly scalable and resilient framework to create and update data in Cornerstone via APIs.

- It is optimized for loading large data sets in an asynchronous, queued model. It is ideal for bulk load use cases where there is a need to create or update data into your Cornerstone portal using APIs. For example, you can use Bulk APIs to keep employee and OU data in sync from your HRIS into Cornerstone.
- It supports the OAuth 2.0 authentication framework released in August 2019.
- It supports the portal configurations including custom fields, custom employee relationships, and availability settings for custom fields.

Use the API to retrieve the status of your loads as well as obtain a full report of the load performed including errors and warnings. Additionally, all the loads performed using the Bulk API are visible in a new Bulk API History page in Edge. The Bulk API History page is only visible to users who have the new Access Edge Bulk API History permission. Additional load-type specific permissions control the downloading of reports from the history page.

### How Does this Enhancement Benefit My Organization?

This API enables organizations to keep their employee and organizational unit (OU) information in Cornerstone up-to-date by loading data in bulk with a modern, scalable REST API.

### API Explorer

Documentation for all available APIs is available in the API Explorer.

- <https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/>

### Considerations

- Organizations using Cornerstone HR cannot use the Bulk API to load employee data since effective dating is not yet supported by the Bulk API.
- SII fields and secure custom fields are not supported by the Bulk API.
- There are new OAuth 2.0 scopes for Bulk API endpoints which is visible while registering a new OAuth 2.0 application or modifying an existing OAuth 2.0 application. Organizations with existing OAuth 2.0 applications must explicitly select the Bulk API scopes before utilizing the Bulk API endpoints.

### Implementation

Organizations can self-activate the Bulk API for users and OUs via the Edge Marketplace in Pilot and Stage environments.

Organizations wanting to use the Bulk API in Production must submit a purchase inquiry via the Edge Marketplace. [See Edge API - Purchase Inquiry.](#)

The Access Edge Bulk API History permission is assigned the System Administrator role by default. The remaining new permissions are enabled upon activation. Additional documentation is available in the API Explorer upon release of the Bulk API.

## Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Bulk API History	Grants access to the Bulk API History page, which displays all the loads that have been performed using the Bulk API. Administrators can select a load to view additional details of the load, including the results. This permission cannot be constrained. This is an administrator permission.	Edge
Access Edge Bulk API	Grants ability to access and utilize the Bulk API. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Cost Center OU	Grants ability to use the Bulk API to load cost center organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Custom OU	Grants ability to use the Bulk API to load custom organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Division OU	Grants ability to use the Bulk API to load division organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.	Edge

	This permission is only available when the Bulk API is enabled via Edge Marketplace.	
Bulk API - Employee	Grants ability to use the Bulk API to load employee data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Grade OU	Grants ability to use the Bulk API to load grade organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Legal Entity OU	Grants ability to use the Bulk API to load legal entity organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Location OU	Grants ability to use the Bulk API to load location organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Position OU	Grants ability to use the Bulk API to load position organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge

## Security Roles

Upon release, the Edge Bulk API History permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.



The remaining new permissions are disabled until the Bulk API is enabled through Edge Marketplace, at which time they are granted to the default System Administrator role.

## Bulk API - Bulk API History

The Bulk API History page displays a history of all loads performed using the Bulk API.

The API History page can be accessed in the following ways:

- Go to [ADMIN > TOOLS > EDGE](#). Then, select the **Bulk API History** link in the Develop section.
- Go to [ADMIN > TOOLS > EDGE > IMPORTS AND FEEDS](#). Then, select the **BULK API HISTORY** button.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Bulk API History	Grants access to the Bulk API History page, which displays all the loads that have been performed using the Bulk API. Administrators can select a load to view additional details of the load, including the results. This permission cannot be constrained. This is an administrator permission.	Edge
Access Edge Bulk API	Grants ability to access and utilize the Bulk API. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Bulk API - Cost Center OU	Grants ability to use the Bulk API to load cost center organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Custom OU	Grants ability to use the Bulk API to load custom organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.	Edge

	This permission is only available when the Bulk API is enabled via Edge Marketplace.	
Bulk API - Division OU	Grants ability to use the Bulk API to load division organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Employee	Grants ability to use the Bulk API to load employee data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Grade OU	Grants ability to use the Bulk API to load grade organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Legal Entity OU	Grants ability to use the Bulk API to load legal entity organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Location OU	Grants ability to use the Bulk API to load location organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.  This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge
Bulk API - Position OU	Grants ability to use the Bulk API to load position organizational unit (OU) data. This permission cannot be constrained. This is an administrator permission.	Edge

This permission is only available when the Bulk API is enabled via Edge Marketplace.

**Bulk API History**
[What is this?](#)

[API Explorer](#)

Wu-0, David x

Completed x

Reset
Filters

Show
25

1

J-West Demo 02042020	<b>Started:</b> 4 Feb 2020, 13:47:31 CST <b>Run By:</b> Wu-0, David	COMPLETED ⚠ All files need attention
J-West Demo 01302020	<b>Started:</b> 30 Jan 2020, 16:15:45 CST <b>Run By:</b> Wu-0, David	COMPLETED ⚠ All files need attention
CHR Demo	<b>Started:</b> 12 Nov 2019, 19:19:44 CST <b>Run By:</b> Wu-0, David	COMPLETED ⚠ All files need attention
Demo	<b>Started:</b> 8 Nov 2019, 18:41:05 CST <b>Run By:</b> Wu-0, David	POST-PROCESSING ⚠ 2 files need attention

## API Explorer

Documentation for the Bulk API is available in the API Explorer.

- API Explorer - <https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/>

## Bulk API History

The following information is displayed for each previous Bulk API run:

- Load name - Administrators can select a feed to view additional details about the load.  
**Note:** Administrators must have the corresponding Bulk API permission to view the details for a load type. For example, you must have the Bulk API - Division OU permission to view the details of a Division OU load.
- Started
- Run by
- Import status
- Import results

## New "Copy Down Scheduled" Email Trigger

With this enhancement, a new "Copy Down Scheduled" email trigger is now available. When enabled, this email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.

*This functionality is not be available at the start of UAT.*

The following tags are available for this email trigger:

- DESTINATION.ENVIRONMENT
- PORTAL.NAME
- RECIPIENT.FIRST.NAME
- RECIPIENT.LAST.NAME
- REQUESTOR.EMAIL
- SCHEDULE.DATETIME
- SOURCE.ENVIRONMENT

It is highly recommended that the portal name, source environment, and destination environment email tags are included in the email body to ensure it is clear which portals and environments are being impacted by the copy down.

## How Does this Enhancement Benefit My Organization?

This functionality provides greater transparency to organizations when their portal is scheduled for a copy down.

## Considerations

This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled.

## Implementation

This functionality is automatically enabled for all organizations.

## Glossary

- Copy Down - A copy down completely copies your database from one environment to another. Traditionally, this is done from a Production environment to a Stage or Portal environment. It can also occur from Pilot to Stage.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration
Global Email Administration - View	Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

## Cornerstone Mobile App Removal from App Stores

Cornerstone has two mobile application offerings in existence today:

- Cornerstone Mobile
- Cornerstone Learn (Introduced in February '18 Release)

The Cornerstone Mobile app will be removed from the Apple App and Google Play stores on April 30, 2020. The app will be deprecated in August 2020 and will no longer function for users if opened following its deprecation in August.

Cornerstone is encouraging clients to use the Cornerstone Learn app which is available today for both iOS and Android in the Apple App and Google Play stores.

The Cornerstone Learn app provides a more scalable solution, newer user interface, and takes advantage of the native features of the iOS and Android systems. When using the Cornerstone Learn app, learners can take advantage of the additional Learn app functionality such as improved login flow, a more modern Learner Home, offline capabilities with auto-sync, curriculum support, enhanced customization abilities, custom navigation links, and more. In the future, the Cornerstone Learn app will eventually be expanded to a broader suite of Cornerstone products allowing for a single, end-user experience.

### Implementation

Effective immediately, the Cornerstone Mobile app is still available but has reached its end-of-service life and is no longer supported, except for critical security and application down issues.

The Cornerstone Mobile app end-of-life is scheduled to occur in August 2020.

## Data Exporter - Deprecation of XML Manifest With the October '20 Release & Addition of JSON Manifest for Non-Core Objects

When a data export is delivered, it contains a manifest which explains the contents of the export. Currently, the manifest for core objects is delivered in both JSON and XML, while the manifest for non-core objects is only delivered in XML.

With this release, Cornerstone is adding a JSON manifest for non-core objects in advance of the upcoming deprecation of the XML manifest in the October '20 Release. The XML manifest will be provided alongside the JSON manifest until the October '20 release, at which point the XML manifest will be deprecated for both core and non-core objects.

The JSON manifest is richer in extended metadata, and Cornerstone now offers these additions:

- Name (custom fields have their user-designated name)
- Heading (when available at the table level)
- Description (when available at the table level)
- Cross-platform, cross-format data types
- User defined object flag (at the object level)

### Implementation

This functionality is automatically enabled for all organizations using the Data Exporter.



## Data Exporter - Addition of NDJSON and JSON Output Formats

Prior to this enhancement, Data Exporter was limited to exporting data in CSV format. Although CSV is widely adopted and used, it has not been standardized, which leaves the comma separated encoding open to interpretation to vendors. Its flat file structure makes it ideal for distributing data, but it is not optimized for programmatic consumption like newer formats such as NDJSON and JSON.

With this enhancement, organizations that use Data Exporter now have the ability to request NDJSON and JSON as output options.

Existing data exports continue to be delivered in CSV format.

### Implementation

This functionality is automatically enabled for all organizations using the Data Exporter.

## Deprecation of Custom Reports with the February '21 Release

Cornerstone will be deprecating the legacy reporting solution "Custom Reports" with the February '21 Release. With Reporting 2.0, users can execute the same business reporting operations as they've done in Custom Reports in addition to Reporting 2.0's rich suite of new features and functionality.

Standard reports will eventually be deprecated but the timeline is currently not yet determined.

For more detailed information about Reporting 2.0, see the following in Online Help:

- [See Reporting 2.0 \(Early Adopter\) Overview.](#)
- [See Reporting 2.0 - Create Report.](#)
- [See Reporting 2.0 - Share Report.](#)
- [See Reporting 2.0 - Report Delivery and Scheduling.](#)
- [See Reporting 2.0 - System Templates.](#)

## Custom Reports Auto-Migration with February '21 Release

When the deprecation occurs, existing Reports will be migrated automatically to Reporting 2.0. For clients that have already done the migration themselves and/or who no longer need the custom reports, there will be an option to opt out of being migrated.

Clients who wish to migrate their custom reports into Reporting 2.0 ahead of the February '21 deprecation can do so by using the custom reports migration tool available in Reporting 2.0. Report properties and certain configurations are preserved in the migration, such as shared users and delivery settings. However, some configurations may need to be manually enabled. [See Custom Reports Migration Tool.](#)

## Implementation

Upon implementation of the May '20 release, the Custom Reports functionality can still be accessed and used in its full capacity.

On the date of the Custom Reports deprecation with the February '21 release:

- You can still access Custom Reports, but reports will no longer run in any capacity. This means that reports cannot be downloaded, refreshed, or delivered or have any action taken on them that involves retrieving data.
- All custom reports will be migrated automatically to Reporting 2.0.
- Any equivalent security configurations will be applied to existing security roles.
- You can opt out of having your custom reports migrated automatically if your organization has already done the migration itself and/or does not need the existing custom reports.

## Permissions

Permissions in Reporting 2.0 are different than the permissions for Custom Reports. Custom Reports had a "Manage" permission for creating and editing reports and a "View" permission for viewing reports, whereas Reporting 2.0 permissions are more granular and users need to be given multiple permissions in order to create or view reports.

It is important to be aware of the differences between permissions in Reporting 2.0 and those in Custom Reports so that users have all necessary permissions to begin using Reporting 2.0.

To understand which permissions your users need to create and view reports, see the following information in Online Help:

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

## Deprecation of Learning Loads on Data Load Wizard (DLW) With the February '21 Release

Ability to perform learning data loads using Data Load Wizard will be deprecated with and end-of-life in the Feb 2021 Release. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

Edge Import addresses these issues with a modern UI and an intuitive workflow that can support a greater number of concurrent loads, while providing administrators with a delightful user experience.

Existing organizations that are ready to migrate to Edge Import can enable it in the Edge Marketplace and review the migration and starter guides to help them through the migration steps. All organizations are required to complete their migrations before the February '21 Release which will be the end-of-life date for DLW learning data loads.

## eCare Redirect to Support Central

In Q1 of 2019, Cornerstone **introduced Support Central**, which provides both an information resource as well as case management. With the May '20 Release, we will be updating the eCare link to Support Central. Please follow **these instructions** to access Support Central.

### Resources

- **[Support Central](#)**
- **[Instructions to Access Support Central](#)**

### Implementation

This functionality is automatically enabled for all organizations.

## Edge Import - Learning Loads (Early Adopter)

With the 6 March 2020 patch release, Edge Import is available to organizations as an Early Adopter for loading Learning Management System (LMS) historical data.

Edge Import delivers an easy, intuitive setup along with simple administration and maintenance. Edge Import learning loads have been available to organizations since February of this year. With Edge Import learning loads, organizations are able to control their own project timelines by validating and loading learning data directly to their portals.

The May '20 Release lays the foundation for **Data Load Wizard (DLW) learning load deprecation** by addressing compliance and performance needs in Edge Import.

The following functionality is new with the May'20 Release:

- Validation Updates
- Capacity Control (available post-release)

*Edge Import Learning Loads were released with the 6 March 2020 patch.*

### Validation Updates

A "What should we do with blank values?" configuration setting is added to Events, Session, and Session Parts loads. "Apply Default" and "Do Nothing" options are implemented for Events, Session, and Session Parts loads.

Also, the limitation that dates must fall between 1965-2025 has been removed for all load types.

### Capacity Control (Available Post-Release)

Backend performance and reliability optimizations have made it possible to remove the 10k record limit for loads in pilot environments. With this change, organizations no longer see an error message indicating that their file exceeds the limit if it contains more than 10k records. The upper limit is now 100k records in Pilot just as it is in Stage and Production.

*This enhancement will be released in a post-release patch.*

### How Does this Enhancement Benefit My Organization?

Edge Import learning loads provide new levels of usability, support, speed, and data integrity functionality to help organizations of all sizes load and maintain accuracy of their learning data.

### Limits and Best Practices

ENVIRONMENT	MAXIMUM FILE SIZE	BEST PRACTICES TO REDUCE IMPACT
Pilot	10k rows, 150 columns	1. Test functional use-cases, and defer to Stage for volume/load testing.

ENVIRONMENT	MAXIMUM FILE SIZE	BEST PRACTICES TO REDUCE IMPACT
	This will be increased to 100k rows in a post-release patch.	<ol style="list-style-type: none"> <li>2. Use Delta files, instead of complete loads.</li> <li>3. Break files that are larger than 10k rows to multiple files that are 10k rows or fewer.</li> </ol>
Stage	100k rows, 150 columns	<ol style="list-style-type: none"> <li>1. Use Delta files, instead of complete loads.</li> <li>2. Break files that are larger than 100k rows to multiple files that are 100k rows or fewer.</li> </ol>
Production	100k rows, 150 columns	<ol style="list-style-type: none"> <li>1. Use Delta files, instead of complete loads.</li> <li>2. Break files that are larger than 100k rows to multiple files that are 100k rows or fewer.</li> </ol>

## Considerations

- LMS data feeds are not currently supported.
- LO and transcripts related to certifications and on the job training (OJT) are not currently supported.
- LO reversioning is not currently supported.
- Once an LMS data load is enabled for Edge Import, the corresponding Data Load Wizard data load is disabled.

## Implementation

The implementation process is dependent on whether the organization is currently using Data Load Wizard for Learning data loads:

- Organizations that are currently using Data Load Wizard can enable this functionality in Pilot and Stage portals via the "Edge Import: Learning Loads" tile in Edge Marketplace. This only enables the loads in their Pilot or Stage portal. Once the organization has tested the functionality, they may enable the functionality in their Production portals by contacting their Account Executive.
- Organizations that are not currently using Data Load Wizard can enable the Edge Import data loads in all environments via the "Edge Import: Learning Loads" tile in Edge Marketplace.

Once Edge Import is activated for a load type in a portal, Data Load Wizard is permanently retired for the corresponding load type in that portal.

## Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Curriculum Load	Grants access to the Curriculum data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Curriculum Transcripts Load	Grants access to the Curriculum Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Events Load	Grants access to the Events data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - External Training Load	Grants access to the External Training data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Facilities Load	Grants access to the Facilities data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - ILT Instructors Load	Grants access to the ILT Instructors data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - ILT Transcripts Load	Grants access to the ILT Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import



Access LMS - Learning Object Equivalencies Load	Grants access to the Learning Object (LO) Equivalencies data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Material Transcripts Load	Grants access to the Material Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Online Courses Load	Grants access to the Online Courses data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Online Transcripts Load	Grants access to the Online Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Providers Load	Grants access to the Providers data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Question Category Load	Grants access to the Question Category data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Question Load	Grants access to the Question data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Session Parts Load	Grants access to the Session Parts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Sessions Load	Grants access to the Sessions data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Subjects Load	Grants access to the Subjects data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Access LMS - Test Mapping Load	Grants access to the Test Mapping data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Test Transcripts Load	Grants access to the Test Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Tests Load	Grants access to the Tests data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Video Transcripts Load	Grants access to the Video Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Videos Load	Grants access to the Videos data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Create/Update Configurations	Grants ability to create and update Edge Import configurations. This permission cannot be constrained. This is an administrator permission.	Edge Import
Delete Configurations	Grants ability to delete Edge Import configurations. Users with this permission can delete configurations created by anyone for all types of data imports. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## jQuery Library Upgrade

With this release, Stage and Pilot environments are being auto-upgraded from jQuery 1.7 to jQuery 3.4. This auto-upgrade will occur in Production environments with the August 2020 release, allowing organizations three additional months to prepare.

If an organization is ready to self-upgrade prior to August, they have the option to do so in Production. A toggle will be available on the jQuery Validation Tool page with the May 2020 Release.

Cornerstone's upgrade of its jQuery library only updates standard core pages of the application. Custom code that organizations have utilized will not be upgraded by Cornerstone as a result of this effort and therefore may contain vulnerabilities and errors produced by older versions of jQuery.

If you have custom developed pages or core areas utilizing custom code inserted via header and footers, you should use the jQuery validation tool, introduced in the October '19 Release, to generate a report of potential jQuery errors that need to be addressed. If these errors are not addressed prior to the May '20 Release for stage/pilot and the August '20 Release for production environments, pages utilizing the custom code will not work as expected.

Please note, the jQuery tool is only a helpful guideline - it is not guaranteed to detect 100% of all outdated custom jQuery. It is strongly recommended that in addition to utilizing the tool, organizations review all custom code for any other outdated jQuery prior to the May '20 release for stage/pilot and the August '20 Release for production environments.

Following the jQuery Library 3.4 upgrade, users on an unsupported browser or operating system will not be able to navigate Cornerstone. Please see Cornerstone's General Minimum Requirements for a full list of supported browsers. [See General Minimum Requirements.](#)

We urge clients to test the jQuery Library 3.4 upgrade in stage and pilot to assess its impact. Following your testing, we strongly encourage you to consider upgrading in production prior to August '20 Release as this upgrade improves the overall security of your portal.

## Rollout Schedule

- Stage:
  - April 15: jQuery Library 3.4 enabled
  - April 23: Toggle to revert back to jQuery Library 1.7
- Pilot
  - May 8 (May '20 Release): jQuery Library 3.4 enabled with toggle to revert back to jQuery Library 1.7
- Production
  - May 8 (May '20 Release): Toggle to upgrade to jQuery Library 3.4
  - August 7 (August '20 Release): jQuery Library 3.4 enabled

## jQuery Validation Tool

*See [jQuery Validation Tool](#).*

## Resources

Listed are helpful links for developers updating the jQuery in your custom development

- Cornerstone's jQuery Migration Guide: <https://click.cornerstoneondemand.com/p0f00P6ikR0r1YXDjk0UVz0>
- jQuery Core 1.9 Upgrade Guide: <https://jquery.com/upgrade-guide/1.9/>
- jQuery Migrate: Migrate older jQuery code to jQuery 1.9+: <https://github.com/jquery/jquery-migrate/tree/1.x-stable#readme>
- jQuery Core 3.0 Upgrade Guide: <https://jquery.com/upgrade-guide/3.0/>
- jQuery Migrate: <https://github.com/jquery/jquery-migrate/>

## Glossary

- jQuery - A JavaScript library designed to simplify HTML Document Object Model (DOM) tree traversal and manipulation, as well as event handling, CSS animation, and Ajax.

## Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
jQuery Validation Tool - Manage	Grants ability to access and run the jQuery Validation Tool. This permission cannot be constrained. This is an administrator permission.	Core Administration

## Kronos Workforce Ready Core Data Inbound Integration

Cornerstone integrates with Kronos Workforce Ready (WFR) to provide a seamless process for creating and updating users and OUs in Cornerstone. This is achieved through an automated data sync which simplifies data management and eliminates redundant work. With this integration, Kronos WFR remains the system of record for user and OU data.

This integration supports standard and custom fields.

*This integration was released with the 6 March 2020 patch. Support for custom fields was added with the 3 April 2020 patch.*

### Implementation

This integration is available for self-Activation via the Kronos Workforce Ready Core Data Inbound Integration tile in Edge Marketplace. This integration is for organizations that use Kronos Workforce Ready as a source of HR data. Please refer to the Kronos Workforce Ready Core Data Inbound Integration Starter Guide document under the Getting Started tab for details on how to enable the integration in your portal. There is no additional cost for this integration.

The following 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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

## May '20 Language Pack Updates

New updates to Cornerstone Language Packs are available with the May '20 Release. Please visit the [May '20 Language Pack Updates posting](#) in the Success Center to review the full list of changes. Languages with updates include:

- Arabic
- Chinese (Traditional)
- Danish
- Dutch
- French (Canada)
- French (France)
- German
- Hungarian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Spanish (Latin America)
- Polish
- Portuguese (Brazil)
- Slovak

Please also visit the [March 6, 2020 Patch Localization Update](#) posting in the Success Center to review translation updates to Check-Ins, as well as other updates related to Arabic, French (France), German, Portuguese (Brazil), Bahasa (Malaysia), and Hebrew that were delivered in the March 6 patch.

## Implementation

This functionality is automatically enabled for all organizations.

## Reporting 2.0 - Calculated Fields

Prior to this enhancement, calculated fields could be created in Custom Reports but were not available in Reporting 2.0. In addition, only eight functions were available, and they were only aggregate functions.

As part of a post release patch for the May '20 release, calculated fields can be created in Reporting 2.0. The calculated fields user interface (UI) in Reporting 2.0 offers a cleaner, simplified look. Additional calculation functions have been added, and every function includes use examples.

Detailed information for creating and utilizing calculated fields will be available in Online Help in a post-release patch.

### Implementation

The calculated fields functionality will be available in a post-release patch for all portals with Reporting 2.0 enabled.

As part of the May '20 release, Reporting 2.0 is now Generally Available and will be enabled automatically for all clients who did not self-enable Reporting 2.0 prior to the May '20 release. [See Reporting 2.0 - General Availability](#) on page 180 *for additional information*.

### Permissions

The following new permission will apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Manage Global Calculated Fields	<p>Grants the ability to publish calculated fields to all users. This permission cannot be constrained.</p> <p><b>Note:</b> <i>Calculated fields can be created by all users who have permission to create reports in Reporting 2.0. However, in order to publish the calculated field globally, a user needs permission to manage global calculated fields.</i></p>	Reporting

For more information about Reporting 2.0 permissions and to see the list of permissions, see the following:

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

## Reporting 2.0 - General Availability

Prior to the May '20 release, Reporting 2.0 was in the "Early Adopter" phase, providing a new reporting tool for standard and custom reports in Learning, Recruiting, Performance, Succession, Compensation, and Extended Enterprise. The tool is intended to provide you with a simple and intuitive way to build and use reports. This is a powerful engine that delivers a single application for creating reports.

With the May '20 release, Reporting 2.0 is Generally Available (GA). Clients no longer need to self-enable Reporting 2.0 in their portals as it will be on by default, making it easier to take advantage of all the functionality that Reporting 2.0 provides.

Auto-enablement only applies to portals that have not enabled Reporting 2.0. Portals that have already enabled Reporting 2.0 should not be impacted by the auto-enablement.

The following are additional Reporting 2.0 enhancements for the May '20 release or are available in a post-release patch:

- Deprecation of Custom Reports with February '21 Release - [See Deprecation of Custom Reports with the February '21 Release](#) on page 166 *for additional information*.
- Usability Enhancements - [See Reporting 2.0 - Usability Enhancements](#) on page 181 *for additional information*.
- Calculated Fields (this functionality will be available in a post-release patch) - [See Reporting 2.0 - Calculated Fields](#) on page 179 *for additional information*.

## Deprecation of Reporting 2.0 Early Adopter Activation Preferences

Upon implementation of this enhancement, the Reporting 2.0 Early Adopter Activation Preferences page is deprecated.

## Availability of Standard and Custom Reports

Both Standard and Custom Reports will still be available upon implementation of this enhancement. [See Deprecation of Custom Reports with the February '21 Release](#) on page 166 *for additional information*.

## Implementation

Upon implementation of the May '20 release, Reporting 2.0 will be enabled for all clients that did not self-enable Reporting 2.0 prior to the May '20 release.

## Permissions

Upon implementation of the May '20 release, the Reporting 2.0 permissions will be granted automatically to the System Administrator role in Security Roles.

**End User Access Note:** *In order for end users to access Reporting 2.0 from the navigation link under the Reports tab, they must have at least one Reporting 2.0 "View" permission.*



## Reporting 2.0 - Usability Enhancements

Usability enhancements were released as part of the 6 March 2020 patch release and the 3 April 2020 patch release.

### 6 March 2020 Patch Release Enhancements

The following usability enhancements were released as part of the 6 March 2020 patch release:

#### Custom Reports Migration

The Import Custom Reports tool has been updated:

- Aggregated Fields - Custom Reports with aggregated fields can now be migrated to Reporting 2.0.
- Reports with Incompatible Fields - Prior to this enhancement, report imports that failed as a result of incompatible fields required the user to delete those fields manually in Custom Reports before attempting the import again. With this enhancement, the incompatible fields are removed automatically upon import. Once imported, a message displays in the import tool indicating which fields were removed.

**Note:** *When migrated to Reporting 2.0, a report that is not summarized will conform to the aggregation behavior in Reporting 2.0. In order to replicate the results from your report in Custom Reports, you can summarize the report in Reporting 2.0.*

#### Load Times Reduced

The time to load the report designer page is reduced. This optimization primarily impacts large portals, but all portals will now have a faster load time.

#### Exception Reporting for Performance Reviews and Development Plans

The following additional Reporting 2.0 enhancements for Performance Reviews and Development Plans were released as part of the 6 March 2020 patch release:

- Exception Reporting for Performance Reviews Fields - [See Reporting Fields - Performance Reviews](#) on page 336 *for additional information.*
- Exception Reporting for Development Plan Fields - [See Reporting Fields - Development Plans](#) on page 145 *for additional information.*

#### Learning Enhancements

The following additional Reporting 2.0 enhancements were released for Learning as part of the 6 March 2020 patch release:

- "Archived from Transcript (Curriculum)" Field - [See Archived from Transcript](#) on page 300 *for additional information.*
- Past Due Aging Filter - [See Past Due Aging](#) on page 303 *for additional information.*
- Certification Fields - [See Reporting - Certification Fields](#) on page 301 *for additional information.*

### 3 April 2020 Patch Release

The following usability enhancements were released as part of the 3 April 2020 patch release:

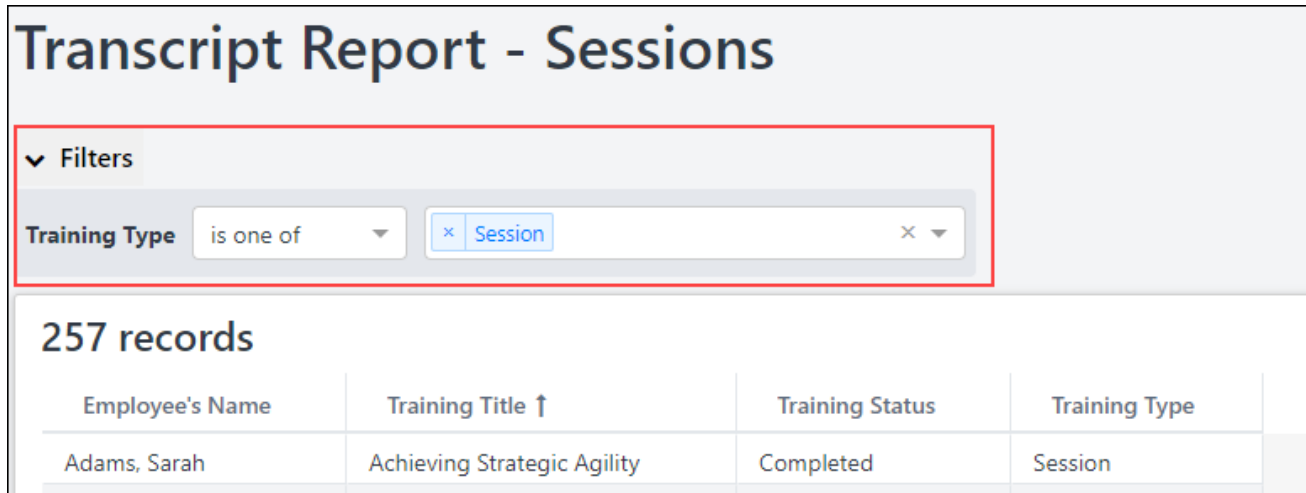
#### Removal of Blank Report Row

Previously, a blank row appeared at the top of the report when the report output was constrained for the users. This occurred when running the report or exporting it. Blank rows also appeared when the **Show distinct rows** option was disabled in report properties, resulting in a duplicate of each row that was supposed to be hidden due respective to the user's constraints.

With this enhancement, blank rows will no longer appear.

#### Report Viewer Filters Section Expanded by Default

The Filters section at the top of the **report viewer** page is expanded by default.



The screenshot shows the 'Transcript Report - Sessions' interface. A red box highlights the 'Filters' section, which is expanded by default. Inside the filters section, the 'Training Type' is set to 'is one of' with a dropdown arrow, and a tag 'Session' is visible with a close button (x). Below the filters, it indicates '257 records' and shows a table with the following data:

Employee's Name	Training Title ↑	Training Status	Training Type
Adams, Sarah	Achieving Strategic Agility	Completed	Session

### Implementation

These enhancements are currently available for all portals that have self-enabled Reporting 2.0.

As part of the May '20 release, Reporting 2.0 is generally available and will no longer be able to be self-enabled. [See Reporting 2.0 - General Availability](#) on page 180 *for additional information*.

### Permissions

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

## Real-Time Data Warehouse (RTDW) Optimizations

With the June 5 patch, two optimizations improve performance in the Real-Time Data Warehouse (RTDW).

### Optimize Learning Object "transcript\_curricula"

This enhancement applies to Cornerstone Learning organizations that are running curricula reports using the Reporting API, Data Exporter, and Replicated Data Warehouse (RDW). Optimized Learning object "transcript\_curricula" improves the overall performance and stability of curriculum transcript reports. Data Exporter gains an optimized "Transcript\_src\_curricula\_core" object that enables delta mode.

*This functionality will be released in a post-release patch. It is not available during UAT.*

### Optimize Cornerstone HR Object "forms2-submissions"

This enhancement applies to Cornerstone HR and Cornerstone Recruiting clients running forms reports using the Reporting API, Data Exporter, and Replicated Data Warehouse (RDW). To lessen the risk of ETL failure when generating forms data, the query used to update the "forms2-submissions" object is updated to only return question bank and custom fields used in a form (both published and non-published).

*This functionality will be released with the 5 June 2020 post-release patch.*

## Implementation

This functionality is automatically enabled for all organizations using RTDW.

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

Impacting only clients using Reporting API, Replicated Data Warehouse (RDW), and Data Exporter, the Real-Time Data Warehouse (RTDW) categories may be impacted, deprecated, or break applications, scripts, or functionalities that are based on earlier versions of RTDW objects.

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

*This functionality available in Stage portals as of 21 April 2020.*

## RTDW Deprecated Objects

This table describes the deprecated objects that are still available in RTDW. These objects are scheduled to be removed in future releases.

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
Goals	User fields in report.vw_rpt_goals	report.vw_rpt_user Join report.vw_rpt_user with report.vw_rpt_goals on goal_user_id (vw_rpt_goals) = user_id (report.vw_rpt_user)	Release 20.03.00 (Aug 2020)	Marked for deletion
Goals	OU fields in report.vw_rpt_goals	report.vw_rpt_user_ou_info 1. Join report.vw_rpt_user with report.vw_rpt_goals on goal_user_id (vw_rpt_goals) = user_id (report.vw_rpt_user). 2. Join report.vw_rpt_user_ou_info with report.vw_rpt_user on user_ou_info_user_id (vw_rpt_user_ou_info) = user_id (report.vw_rpt_user)	Release 20.03.00 (Aug 2020)	Marked for deletion
Goals	User dynamic relation fields in report.vw_rpt_goals	report.vw_rpt_user_dynamic_relation 1. Join report.vw_rpt_user with report.vw_rpt_goals on goal_user_id	Release 20.03.00 (Aug 2020)	Marked for deletion

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
		(vw_rpt_goals) = user_id (report.vw_rpt_user) 2. Join report.vw_rpt_user_dynami c_relation with report.vw_rpt_user on user_dynamic_relation_us er_id (vw_rpt_user_dynamic_rel ation) = user_id (report.vw_rpt_user)		
Training and Transcript	report.vw_rpt_training_subject	report.vw_rpt_subject, report.vw_rpt_subject_training Join report.vw_rpt_subject with report.vw_rpt_subject_training on vw_rpt_subject.subject_id = vw_rpt_subject_training.subject_id	Release 20.03.00 (Aug 2020)	Marked for deletion
Certification	report.vw_rpt_certification	report.vw_rpt_certification2 (added in 20.01.03) report.vw_rpt_certification_owner (added in 20.01.03) Note: report.vw_rpt_certification2 has all fields from deprecated report.vw_rpt_certification except fields of certification owner: [certification_owner], [certification_owner_user_ref] and fields of certification contact person: [cert_contact_user_ref], [cert_contact_user_name], [cert_contact_user_email]. To get fields of certification owner:	Release 20.04.00 (Oct 2020)	Marked for deletion

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
		<p>1. Join report.vw_rpt_certification2 with report.vw_rpt_certification_ owner on cert_id = cert_owner__cert_id</p> <p>2. Join report.vw_rpt_certification_ owner with report.vw_rpt_user on cert_owner__user_id (vw_rpt_certification_owner ) = user_id (report.vw_rpt_user)</p> <p>3. Use [user_name_first] , [user_name_last], [user_ref] fields from report.vw_rpt_user.</p> <p>To get fields of certification contact person:</p> <p>1. Join report.vw_rpt_certification2 with report.vw_rpt_user on cert_contact_user_id (report.vw_rpt_certification 2) = user_id (report.vw_rpt_user).</p> <p>2. Use [user_name_first] , [user_name_last], [user_ref], [user_email] fields from report.vw_rpt_user.</p> <p>Note: Inclusion of certification owner fields into deprecated report.vw_rpt_certification causes multiplication of rows with certification fields on number of certification owners which results in a huge volume</p>		

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
		<p>of extra rows of data to be generated.</p> <p>report.vw_rpt_certification2 (without certification owner fields) doesn't have extra rows of data.</p> <p>Illustrative Example: With 500 users on a certification who have each complete 3 periods and are now in refresh, with 5 certification owners this results in 10,000 rows of data:  report.vw_rpt_certification: 500 (users) * 4 (periods) * 5 (certification owners) = 10,000 rows.</p> <p>report.vw_rpt_certification2: 500 (users) * 4 (periods) = 2,000 rows.</p>		
Certification	report.vw_rpt_certification_export	report.vw_rpt_certification2	Release 20.04.00 (Oct 2020)	Marked for deletion
Test	report.vw_rpt_test_export	report.vw_rpt_test	Release 20.04.00 (Oct 2020)	Marked for deletion
Evaluation	report.vw_rpt_evaluation_export	report.vw_rpt_evaluations	Release 20.04.00 (Oct 2020)	Marked for deletion
Transaction	report.vw_rpt_transaction_export	report.vw_rpt_transaction	Release 20.04.00 (Oct 2020)	Marked for deletion
Training and Transcript	report.vw_rpt_transcript_export	report.vw_rpt_transcript	Release 20.04.00 (Oct 2020)	Marked for deletion
Goals	report.vw_rpt_goals_base	report.vw_rpt_goals	Release 20.04.00 (Oct 2020)	Marked for deletion

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
User	report.vw_rpt_user_base	report.vw_rpt_user	Release 20.04.00 (Oct 2020)	Marked for deletion
Training and Transcript	report.vw_rpt_subject_local	report.vw_rpt_subject_local2	Release 20.04.00 (Oct 2020)	Marked for deletion
Training and Transcript	report.vw_rpt_lo_subject_local	report.vw_rpt_subject_local2	Release 20.04.00 (Oct 2020)	Marked for deletion
Evaluations, Test	report.vw_rpt_qti_text_local	report.qna_text_local_core	Release 20.04.00 (Oct 2020)	Marked for deletion
Evaluations, Test	report.vw_rpt_qti_category_local	report.qna_question_category_local_core	Release 20.04.00 (Oct 2020)	Marked for deletion
Training and Transcript, Training Plan, Training Unit, Connect	report.vw_rpt_ou_type_local	report.vw_rpt_ou_type_local2 (added in 20.01.03)	Release 20.04.00 (Oct 2020)	Marked for deletion
Training and Transcript	report.vw_rpt_lo_material_type_local	report.vw_rpt_training_material_type_local	Release 20.04.00 (Oct 2020)	Marked for deletion
Training and Transcript	report.vw_rpt_session_schedule_local	report.vw_rpt_training_part_local	Release 20.04.00 (Oct 2020)	Marked for deletion

## Deprecated Data Exporter Objects

This table describes deprecated objects that are still available in the Data Exporter. These objects are scheduled to be removed in the current and future releases. Do not use these deprecated objects in new development work, and modify applications that currently use these deprecated objects as soon as possible.

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
[lo_root_id] field in [training_core]	New field [source_object_id] in [training_core] (it will be available in 19.06.00)	Release 20.02.00 (May 2020)	Deleted



DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
COMPATIBILITY_ou_title_local	[ou_local_core]	Release 20.02.00 (May 2020)	Deleted
COMPATIBILITY_qti_text_local	[qna_text_local_core]	Release 20.02.00 (May 2020)	Deleted
ou	[ou_core]	Release 20.02.00 (May 2020)	Deleted
training_type	[training_type_core]	Release 20.02.00 (May 2020)	Deleted
training_type_local	[training_type_local_core]	Release 20.02.00 (May 2020)	Deleted
transcript_status	[transcript_status_local_core] Use filter for default culture: [is_default] = 1	Release 20.02.00 (May 2020)	Deleted
transcript_status_local	[transcript_status_local_core]	Release 20.02.00 (May 2020)	Deleted
training_title_local	[training_local_core]	Release 20.02.00 (May 2020)	Deleted
COMPATIBILITY_custom_field_value_local	Custom Field Enumerated Options Localization objects: [application_cf_enum_local_core] [devplan_cf_enum_local_core] [offer_letter_cf_enum_local_core] [ou_cf_enum_local_core] [performance_review_cf_enum_local_core] [succession_cf_enum_local_core] [training_forecast_cf_enum_local_core] [user_cf_enum_local_core]	Release 20.02.00 (May 2020)	Deleted
custom_field_value	Custom Field Enumerated Options Localization objects. Use filter for default culture: [is_default] = 1: [application_cf_enum_local_core]	Release 20.02.00 (May 2020)	Deleted

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
	[devplan_cf_enum_local_core] [offer_letter_cf_enum_local_core] [ou_cf_enum_local_core] [performance_review_cf_enum_local_core] [succession_cf_enum_local_core] [training_forecast_cf_enum_local_core] [user_cf_enum_local_core]		
custom_field_value _local	Custom Field Enumerated Options Localization objects: [application_cf_enum_local_core] [devplan_cf_enum_local_core] [offer_letter_cf_enum_local_core] [ou_cf_enum_local_core] [performance_review_cf_enum_local_core] [succession_cf_enum_local_core] [training_forecast_cf_enum_local_core] [user_cf_enum_local_core]	Release 20.02.00 (May 2020)	Deleted
COMPATIBILITY_training_form_cf_display_value_local	[training_cf_enum_local_core]	Release 20.02.00 (May 2020)	Deleted
training_subject (RTDW object report.vw_rpt_training_subject)	[subject_core] [subject_training_core]		Marked for deletion
Following fields in [goal] object (RTDW object report.vw_rpt_goals ) will be deleted: User fields, OU fields, User dynamic relation fields	[users_core] [user_ou_pivoted_core] [user_dynamic_relation_core]		Marked for deletion
certification	[certification2] (added in 20.01.03) [certification_owner] (added in 20.01.03) Note: [certification2] has all fields from deprecated [certification] except fields of certification owner: [certification_owner], [certification_owner_user_ref] and fields of certification contact person: [cert_contact_user_ref],		Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
	[cert_contact_user_name], [cert_contact_user_email]. Use [users_core] for certification owner and certification contact person fields.		
goals_base	[goal]		Marked for deletion
evaluation: [eval_question_cate gory_id] field will be renamed to [re_eval_question_c ategory_id]		Release 20.04.00 (Oct 2020)	Marked for update
transcript: [object_id] field will be renamed to [transc_object_id], [_last_touched_dt_u tc] field will be added		Release 20.04.00 (Oct 2020)	Marked for update
COMPATIBILITY_s ubject_local	[subject_local_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
COMPATIBILITY_tr aining_subject_local	[subject_local_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
COMPATIBILITY_qt i_category_local	[qna_question_category_local_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
COMPATIBILITY_o u_type_local	[ou_type_local_core] (added in 20.01.03)	Release 20.04.00 (Oct 2020)	Marked for deletion
training_material_ty pe_local	[training_material_type_local_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
COMPATIBILITY_s ession_schedule_lo cal	[training_part_local_core]	Release 20.04.00 (Oct 2020)	Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
COMPATIBILITY_transcript_user_part_attendance	[training_part_core], [training_part_attendance]	Release 20.04.00 (Oct 2020)	Marked for deletion
instructor	[instructor_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
test_questions	[qna_question_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
training_cf	[training_cf_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
training_rating_review	[course_rating_core] Use [users_core] for the reviewer fields (First Name, Last Name). Note: to get replacement for [user_rating_is_anonymous] field in deprecated [training_rating_review] object use the following: cast ( case when [course_rating_core].[user_id] is null then 1 else 0 end as bit) as [user_rating_is_anonymous]. Field [user_id] in [course_rating_core] is unique identifier of the user who reviewed the course. Note that [user_id] has NULL value if the course reviewer is anonymous).	Release 20.04.00 (Oct 2020)	Marked for deletion
training_session_schedule	[training_part_core], [training_part_local_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
training_subject_equivalent	[subject_equivalent_core], [subject_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
transcript_cf	[transcript_cf_core]	Release 20.04.00 (Oct 2020)	Marked for deletion
transcript_scorm2004	[scorm2004_activity_session_history], [scorm2004_interaction_history], [training_scorm_core]	Release 20.04.00 (Oct 2020)	Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
user_cf	[users_cf_core]	Release 20.04.00 (Oct 2020)	Marked for deletion

## STS Authentication End-Of-Life to Occur With The February '21 Release

Cornerstone's legacy API authentication framework, Session Token Service (STS), will be deprecated in February 2020 and will be fully retired and unavailable in February 2021. Any requests to the endpoint will fail starting February 2021, when STS is fully retired.

Organizations must modify their code for existing integrations that use Cornerstone's API and switch to OAuth 2.0 from STS by February 2021. This only impacts Cornerstone's RESTful APIs, which includes the following:

- Cornerstone's Foundational APIs (i.e., Cornerstone REST services)
- Reporting API
- Employee API (i.e., Cornerstone Core/Cornerstone HR services)
- Express Class API
- Learning Assignment API
- Job Application API

The following are NOT currently impacted:

- xAPIs
- SOAP APIs

## Workday Core Data Inbound Integration Enhancement

When configuring the Workday Core Data Inbound Integration in Edge, administrators are required to enter their Workday credentials on the Settings page. These credentials are used to connect with Workday's API and pull data into the Cornerstone system.

Prior to this enhancement, the Workday Core Data Inbound Integration did not check to confirm if the Workday integration credentials were valid at the time they were entered and saved on the Settings page of the Workday Core Data Inbound Integration in Edge. Administrators were not aware that invalid credentials had been entered until after the integration runs and they receive the email notification.

With this enhancement, the Workday Core Data Inbound Integration now includes a validation check on the Settings page when configuring the integration in Edge. The administrator is alerted if the value entered for any of the fields below is invalid:

- Workday Tenant URL
- Integration System User Username
- Integration System User Password

## How Does this Enhancement Benefit My Organization?

This enhancement enables administrators to immediately know if they have entered invalid configuration information for the integration.

## Implementation

This functionality is automatically enabled for all organizations.

## 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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

# Cornerstone HR



## Point-In-Time Headcount - New Fields

*This functionality was made available with the March 6, 2020 patch.*

Ten new fields have been added to the Point-In-Time Headcount report. These new fields will automatically appear in the Point-In-Time Headcount export:

- Original Hire Date
- User Status
- Last Hire Date
- Activation Date
- Deactivation Date
- Time Zone
- Allow Reconciliation
- Required (Training) Approvals
- Display Language
- Is Rehired Employee

## Secure User Custom Fields

Prior to this release, clients do not have the ability to define their own Sensitive Personally Identifiable Information (SPII) fields.

With this release, newly created short text, scrolling text, date, and numeric user custom fields can be configured as secure fields, by using a new “Secure” checkbox on the Custom Field Administration page. Secure custom fields will function like Sensitive Personally Identifiable Information (SPII) fields and can be maintained and viewed if the administrator’s IP is part of the IP safe list.

**Define Field**

Define the field name, field type, field availability and additional field properties below. If availability is not defined the custom field is not visible to anyone.

Name: Allowance type  
 Category: User Record Custom Field  
 Email Tag: allowance  
 Type: Dropdown  
 Active: ☒  
 All Users: ☒ If unchecked, this field will only appear on the records of users added via a self-registration group. If checked, this field will appear on the records of all users, regardless of how they are added to the portal.  
 Read Only: ☐  
 Required: ☐ If checked, users must enter a value in this field for User Records, bulk data loads and feeds, and Employee Public API. Any existing feed setup must be reconfigured to include required fields.  
**Secure:** ☒ If checked, users must add authorized IP Addresses to secure custom field IP Whitelist

**OPTIONS**

**AVAILABILITY**

Cancel Save


On the user record, secure custom field data is masked by default, but with proper permission, an administrator can click **SHOW** to view the masked data.

Home > Sachin Tendulkar > User Record

**User Record** As Of Today

TestingHTML

Today  
11/19  
2019

 Name: Sachin Tendulkar User Name: srl100  
 User ID: 00001261 Local System ID:  
 Original Hire Date: 11/4/2015 Last Hire Date:  
 Allow Reconciliation: No Absent: No  
 Active Status: Active

**Sensitive Information**

Social Security Number: XXX-XX-XXXX Show Date Of Birth: XXXXXXXX Show

## Considerations

- When creating a new Secure custom field, the **All Users** and **Active** boxes must be checked.
- The Secure property can only be configured when creating a new custom field and cannot be changed.

- To prevent any potential secure data from being accessible to non-whitelisted users, Secure custom fields cannot be included in group membership criteria or email notifications.
- Required custom fields cannot be set to Secure.
- Secure custom fields cannot be added to My Account and won't be available for selection in My Account preferences.
- Secure custom fields cannot be maintained via Data Load Wizard. Any existing load/feed setup must be reconfigured to exclude secure custom fields.
- Secure custom fields cannot be maintained or exposed via Employee API.
- Secure custom fields cannot be maintained via Forms.
- Secure custom fields cannot be accessed via standard or custom reports.
- Secure custom fields cannot be accessed via Point in Time Headcount report or Employee Record Change ODF.
- Secure custom fields cannot be included in duplicate user management preferences. If a potential duplicate is identified, the system will exclude secure custom field data when admin resolves the duplicates via 'Pending Duplicate Users page' and client will need to re-enter the secure data for the resolved user record.
- Secure custom field changes will be audited and visible in Modification History in an encrypted format. Detailed audits on who viewed decrypted information can be provided on a need basis by contacting GPS.
- Secure custom field feature cannot be disabled.
- Portal copydowns won't include secure custom field data as the encryption keys are different across environments. Secure custom field data will not be retained in copydowns.

## Implementation

This functionality is available by default to CHR clients only.

## Use Case

John Adams is a system admin at the ACME organization. He is preparing to onboard 10 new employees in Acme's newest Spain office. John wants to ensure that the Cornerstone HR system is set up correctly to ensure that other regional HR business partners can quickly onboard the next set of employees.

John wants to promote high quality data integrity standards and wants to ensure that ACME stays compliant with respect to employee data capture. He is aware that employees in Spain need to register their tax identification number (NIF) with their company for payroll processing. John is aware that the NIF number is SPII data and only members of Regional HR team should be authorized to maintain this information. As a result, John is looking for a way to securely manage the employee data administration using authorized IP addresses for an additional layer of security, as well as setting the correct permissions.

Since the NIF number is not available as a standard field, John logs into the Cornerstone system and navigates to the User Custom Field Administration page. John creates a new custom field and checks the 'Secure' checkbox that allows him to set NIF number as a secure custom field that can only be maintained by IP whitelisted users.

## Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - Edit Secure User Custom Fields - Unmasked	Grants the ability to edit secure user custom field info unmasked. This permission can be constrained by OU, Restrict to User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - Manage Secure User Custom Fields	Grants the ability to manage the setting secure user custom fields. This permission can be restrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Masked	Grants the ability to view secure user custom field info masked. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Unmasked	Grants the ability to view secure user custom field info unmasked. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Self-Registration and User Record Custom Fields - Manage	Grants access to manage custom fields for user Self Registration and the user record in Custom Field Administration. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration
User Record Custom Field Configurable Validations - Manage	Grants ability to manage the configurable validations for user record custom fields within Custom Field Administration. This permission cannot be constrained. This is an administrator permission. This permission is only available to organizations that are using Cornerstone HR.	Core Administration

# Learning

## Adobe Connect

## Adobe Connect Meeting - Allow Multiple Accounts Via Self-Service

Prior to this enhancement, only one instance of Adobe Connect Meeting could be configured at a time for one portal, unless an organization initiated a custom project.

With this enhancement, multiple instances of Adobe Connect Meeting are supported for each portal. Administrators can add multiple instances of Adobe Connect Meeting to the Adobe Connect integration via self-service in Edge Integrate.

### Use Case

Athena is a learning manager at ACME Electric, and her Support division and Maintenance division would both like to use Adobe Connect Meeting to support virtual training. Athena can add multiple instances of Adobe Connect meeting herself via Edge Integrate. In the future, if other divisions or business units add more Adobe Connect accounts, she can add additional accounts as needed.

### Considerations

The following considerations apply to this enhancement:

- This enhancement only applies to the Adobe Connect Meeting integration. Other Adobe integrations are not impacted by this enhancement.
- Modifying the **Vendor Name** field for the integration can cause the integration to stop functioning. Do not modify the **Vendor Name** field.
- Previously added instances of Adobe Meeting display in the Meetings table
- Adobe Meeting instances cannot be removed; they can only be hidden temporarily and inactivated. This behavior will be updated in a future patch.

### Implementation

The Adobe Connect Meeting integration is available for purchase in the Edge Marketplace. After the integration has been purchased, it can be configured and multiple accounts can be added to the 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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
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## Adobe Connect Meeting - Configure

The Adobe Connect Meeting integration can be purchased by an administrator via Edge Marketplace and configured in the Edge Integration Center.

To access the Edge Marketplace, go to [ADMIN > TOOLS > EDGE > MARKETPLACE](#). From the Edge Marketplace, search for and select the Adobe Connect Meeting integration. After the integration has been purchased, it displays in the Edge Integration Center. To configure the integration, find it in your Edge Integration Center and click the **CONFIGURE** button next to the integration.



### Permissions

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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

Please fill in the fields below to configure your integration.

[Setup Instructions](#)

Meetings

Vendor Name	Admin Username	Admin Password	Adobe Endpoint	***ProviderId***	Active	Remove
Adobe Meeting Roor	Dtest@CSOD.COM	*****	https://csod-test.ado	abcd-123-efgh-4567	<input checked="" type="checkbox"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

[+ Add New Meetings](#)

## Configure Meetings

On the Settings page of the Adobe Connect Meeting integration, the administrator can configure multiple instances of Adobe Connect Meeting for the integration. To add a new meeting to the Meetings table:

1. Click the **ADD NEW MEETINGS** button.
2. Populate the following fields for the meeting:
  - **Vendor Name** (do not modify the vendor name after the meeting has been added, as this may cause the integration to stop functioning)
  - **Admin Username**
  - **Admin Password**
  - **Adobe Endpoint**
  - **ProviderID** (leave this field blank; a value for the ProviderID is generated automatically)
3. After providing all the required information for the meeting, click the **SAVE SETTINGS** button at the bottom of the page. The new meeting will be saved to the Meetings table.

The following options are available for managing the meeting:

- **Active** - Toggle this switch to the Active or Inactive position to activate or deactivate the meeting.
- **Remove** - Clicking the **Remove** option does NOT remove the meeting from the integration. The meeting will be temporarily hidden. The behavior of this option will be modified with a future patch.

Click the **SAVE SETTINGS** button at the bottom of the page to save any modifications made to the integration's meetings.

## Cornerstone Learn - Background Processing for Course Downloads (iOS)

Prior to this enhancement, when downloading training in the Cornerstone Learn app, it was necessary for learners to keep the Learn app open in the foreground of their device until the download completed. If the app was moved to the background of the device, the download process was aborted and an error displayed.

With this enhancement, when downloading training in the iOS version of the Cornerstone Learn app, learners can put the Learn app in the background of their device and the download will continue processing until complete. **Note:** *This functionality was already available for the Android version of the app.*

### Considerations

- There are iOS limitations on how much processing can occur when an app is in the background. The main variables are how many apps are open on the user's device and how much CPU is being consumed on the device. This determines the priority and CPU capacity allotted to Learn downloads.
  - In most cases, 1-3 minutes should be allotted to perform background downloads. If Apple aborts the process, an error icon displays on the course the user attempted to download. The user can tap the icon and attempt to download again.
- When downloading multiple courses, it is recommended that users briefly reopen the app periodically. This will reset the background processing time allotted by Apple and allow for the background process to continue.
- For reference, 85% of Learn app downloads take less than 90 seconds.
- It is recommended that learners use a stable connection, preferably WiFi, when downloading courses in the background.
- If user quits the Learn app while a download is in progress, the download process is aborted and an error displays on the training.

### Enablement

This functionality is enabled by default after users update their Learn app from the Apple App Store. **Note:** *This functionality was already available for the Android version of the app.*

In order for training to be downloadable, a system administrator must navigate to the Course Catalog - General page for the training and select the **Allow download for offline consumption** option.

## Cornerstone Learn - Device Registration

## Cornerstone Learn - Device Registration (iOS) and "Forget Me" Link

With the March 20, 2020 patch, iOS users can register mobile devices and generate a device key as an alternative authentication method for logging into the Learn app.

A **Forget Me** link has also been added to the App Settings page, allowing users to de-register their account from their mobile device.

These enhancements were made available for iOS with the March 20 2020 patch. These enhancements were made available for Android with the March 6 2020 patch.

- [Click here to download the Cornerstone Learn for Android Starter Guide!](#)
- [Click here to download the Cornerstone Learn for iOS Starter Guide!](#)

### Considerations

- The 5-digit PIN users configure during the device registration process is temporary, and users will be prompted to configure either a 6-digit PIN to use for future logins.
- Users cannot configure device registration from within the Learn App; devices can only be registered from the desktop application.

### Implementation

This functionality is automatically available to all organizations using or planning to use the Cornerstone Learn app.

### Permissions

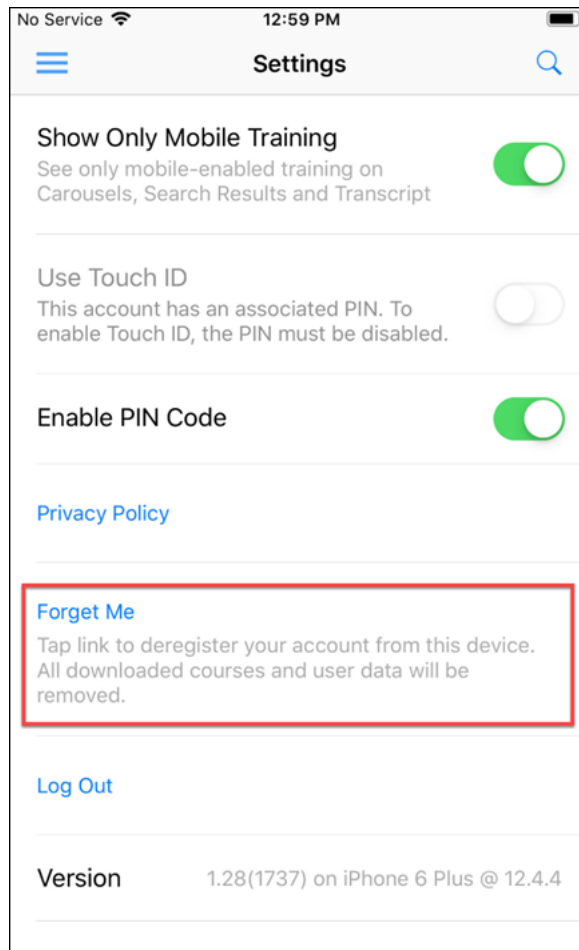
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
My Account Devices - Manage	Grants ability to access the Devices tab of My Account. The Devices tab enables users to register their mobile devices with the Cornerstone application. This permission cannot be constrained. This is an end user permission.	Mobile
Order Status Adjusted	This email is triggered when a user's order status is changed. This email can be sent to a specific user, position, Purchaser, or Order Status Adjuster.	Billing

## Cornerstone Learn - Forget Me Link

With this enhancement, users can deregister their account from their mobile device using the **Forget Me** link on the App Settings page of the app. To deregister your account from your mobile device, launch the app and tap the Settings tab. On the Settings page, tap the **Forget Me** link. Your account will be deregistered from your device, and the following will be removed from your device:

- User data (including your name from the multi-user drop-down menu)
- Downloaded course data (Previously downloaded courses can then be consumed on a different device)
- Device Registrations, PIN, and Biometric Authentication



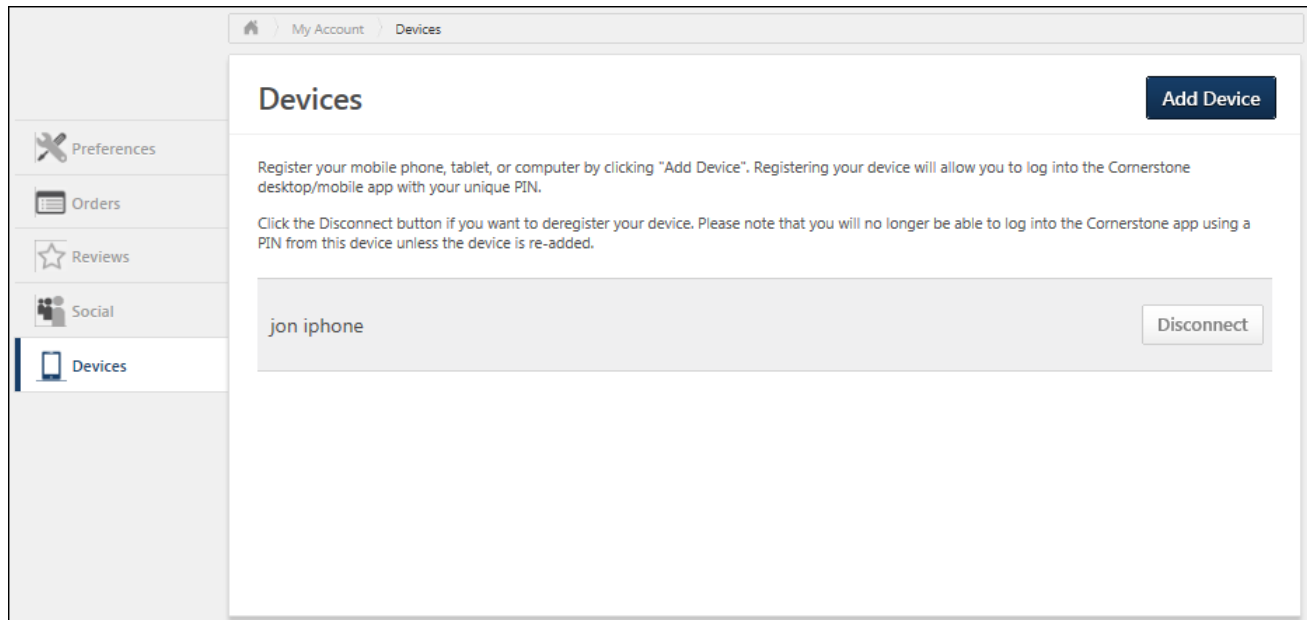
## Register Device

Users can register a device via the My Account tab of the desktop version of the Cornerstone system and then complete the device registration using the app.

Within the desktop version of the Cornerstone system, navigate to [MY ACCOUNT > DEVICES](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
My Account Devices - Manage	Grants ability to access the Devices tab of My Account. The Devices tab enables users to register their mobile devices with the Cornerstone application. This permission cannot be constrained. This is an end user permission.	Mobile



## Add Device

1. Click the **ADD DEVICE** button.
2. Provide a device name and provide a *temporary* 5-digit PIN.
3. The system will generate a device key.
4. Log into the Learn app. An **Alternative Login Method** link will display on the login screen, along with a field for the system portal name.
5. Input your portal name and tap the **Register Device** option.
6. Input your temporary 5-digit pin and device key.
7. The app will prompt you to either create a new 6-digit pin or configure biometric authentication.



8. After you have configured a pin, you will be logged into the app. Continue to use the PIN you configured for future logins.
  - For information about configuring a PIN: [See \*Learn App - Configure PIN\*](#).

## Cornerstone Learn - Offline Course Deletion for Android

## Cornerstone Learn - Offline Course Deletion - Overview

Prior to this enhancement, users of the Cornerstone Learn app were only able to delete downloaded courses from their application while connected to the internet.

With this enhancement, learners using the Cornerstone Learn app offline can delete previously downloaded courses. This enhancement was made available for iOS on December 6 2019, and will be available for Android with the February 2020 release.

- [\*\*Click here to download the Cornerstone Learn for Android Starter Guide!\*\*](#)
- [\*\*Click here to download the Cornerstone Learn for iOS Starter Guide!\*\*](#)

### Implementation

This functionality is automatically available to iOS users and Android users of the Cornerstone Learn app. Download updates for the Cornerstone Learn app from the Apple App store or the Google Play store.

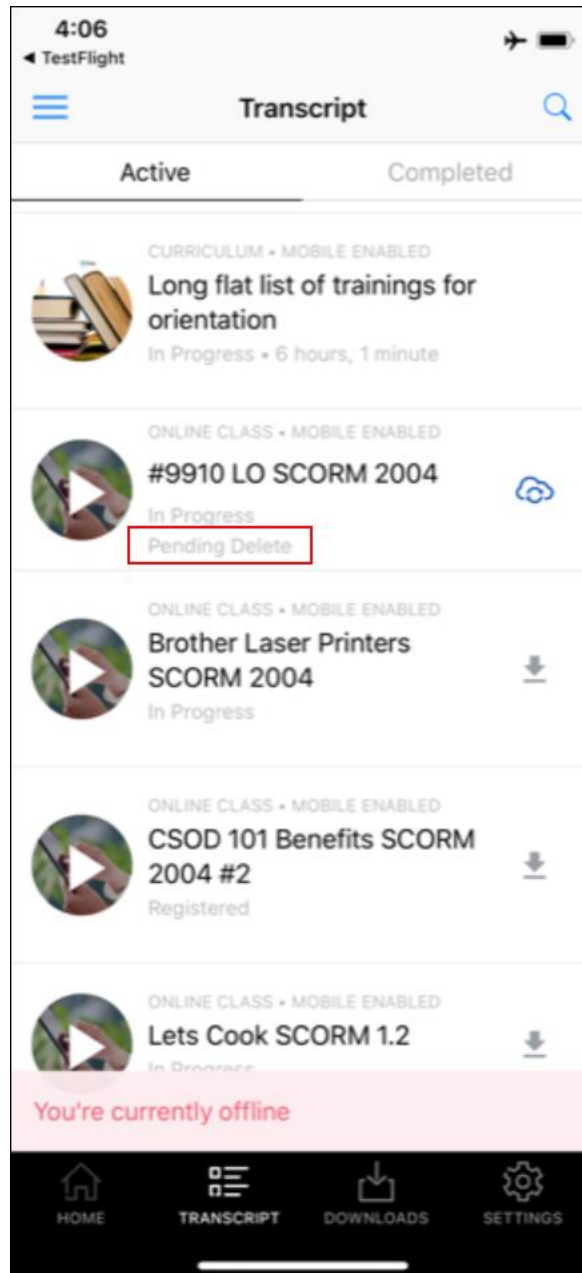
## Cornerstone Learn - Delete Offline Course

Users can delete courses from their Cornerstone Learn app transcript even when they are not connected to the internet.

To delete a course:

1. Navigate to your transcript and tap the downloaded course you want to delete.
2. Tap the Options icon in the upper-right corner of the screen. This expands the Options menu.
3. Tap the **Delete** option. This option is available even when the Cornerstone Learn app is accessed offline. The downloaded course will be in a Pending Delete status while the deletion is in progress. When the course has been successfully deleted, it will be available for download again and the **Download** icon will display to the right of the course.

The course will no longer be available for offline consumption via your Cornerstone Learn app unless it is downloaded again.



## Cornerstone Learn - Playlists

## Cornerstone Learn - Playlists - Overview

Prior to this enhancement, users were unable to interact with playlists in the Cornerstone Learn app, aside from searching for them and saving them for later to be consumed on the desktop app.

With this enhancement, users of the Cornerstone Learn app can interact with playlists in the following ways:

- Search for and filter by playlists via Learning Search
- Follow playlists
- Access playlists via a new carousel on Learner Home in the app
- Consume training within playlists
- Launch external content from within playlists in the app
- View playlist metrics
- Share playlists with other users

**These enhancements will be made available for both the Android version and the iOS version of the Cornerstone Learn app with the May release. These enhancements are not available during UAT.**

- **[Click here to access the Learning Playlists Starter Guide!](#)**
- **[Click here to download the Cornerstone Learn for Android Starter Guide!](#)**
- **[Click here to download the Cornerstone Learn for iOS Starter Guide!](#)**

### Exclusions

The following playlist functionality is NOT available for playlists within the Learn app:

- Create playlists - Users cannot create playlists within the Learn app
- Add to playlists - Users cannot add items to playlists within the Learn app
- Edit playlists - Users cannot edit playlists within the Learn app
- Copy playlists - Users cannot copy playlists from within the Learn app
- View as administrator - Users are not able to view playlists as an administrator from within the Learn app
- Follower and creator bios - Users cannot navigate to the Universal Profile of a playlist creator or a playlist's followers

### Considerations

In order for playlist functionality to be enabled in the Learn app, it must be enabled in your portal. For information about activating playlist functionality in your portal: [See Learning Feature Activation Preferences](#).

### Implementation

This functionality is automatically available for both the Android and iOS versions of the Learn app.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Playlists - View	Playlists will be visible to users with this permission. The user can search for playlists, follow playlists, and consume training contained within playlists that are available to them. The learning playlists that are visible to a user are not impacted by this permission, but instead is based on the availability of the playlist. This permission cannot be constrained. This is an end user permission.	Learning - Administration



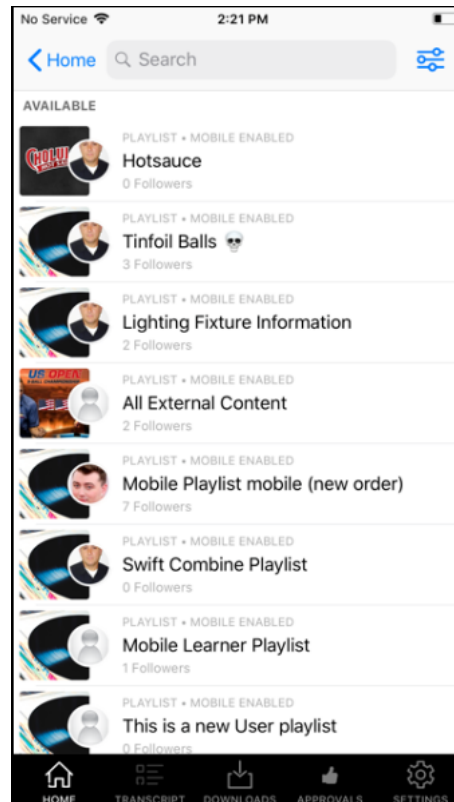
## Cornerstone Learn App - Playlist Features

See below for details about the playlist functionality now available within the Cornerstone Learn app:

### Search for Playlists

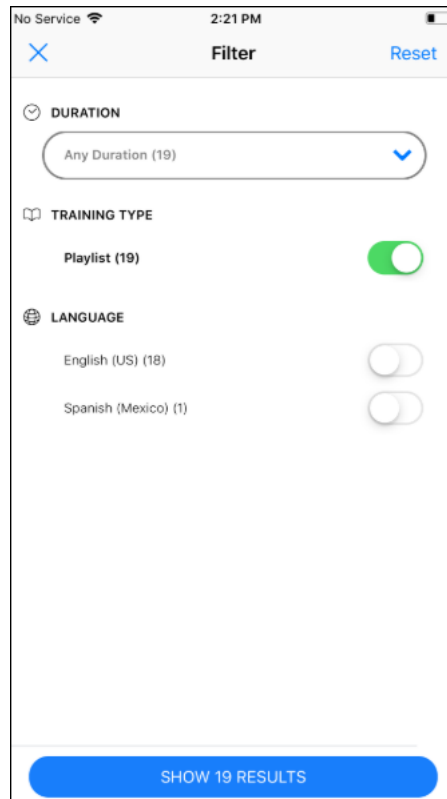
Users can search for playlists on the Learning Search page.

- If the user taps a playlist from the Learning Search page, they are navigated to the Playlist Details page for the playlist.
- Playlists respect the **Mobile Enabled** filter, meaning that if this filter is enabled, the user will only see playlists that are mobile-enabled. To also see non mobile-enabled training, the user can navigate to the Settings page of the app and disable the **Show Only Mobile Training** setting.
- Users can only search for playlists that are public.
- Search is disabled when a user is offline.



### Filter by Playlists

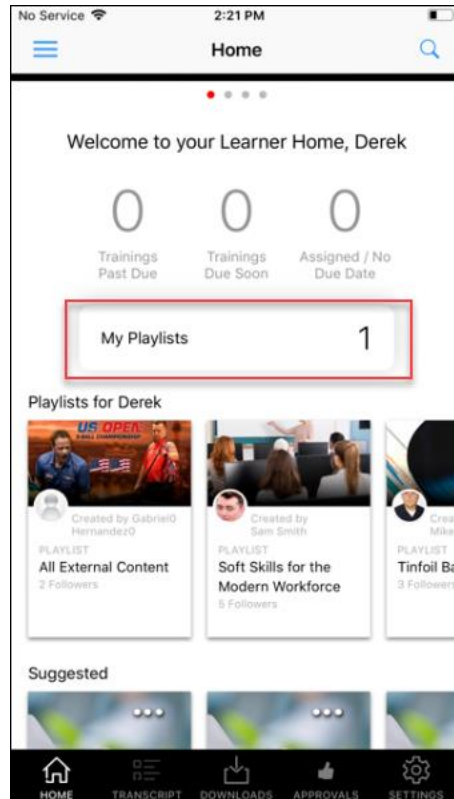
When searching for playlists, users can use the Playlist filter to constrain their search results to playlists. To use this filter, tap the **Filters** icon and toggle the **Playlist** filter in the Training Type section to the On position.



## View Playlist Metrics

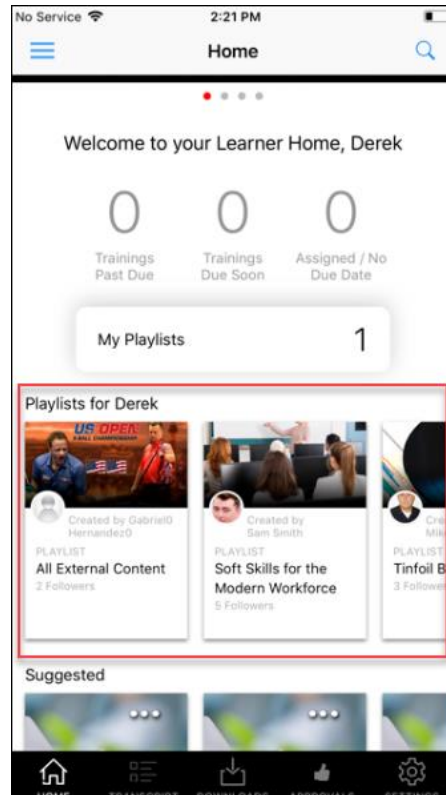
- A Playlist Metrics card displays on the Learner Home page of the app, indicating how many playlists the user has created. **Note:** The card will display a 0 if the user has not created any playlists, but they can still access their followed playlists by tapping this card and tapping the Followed tab.
- Tap the Playlist Metrics card to navigate to a My Playlists page, which is separated into two tabs: Created and Followed. Any playlists the user has created display on the Created tab. Any playlists the user is following display on the Followed page.

**Note:** Playlists cannot be created from the Learn app. To create a playlist, access the system via a desktop device.



## Playlists Carousel

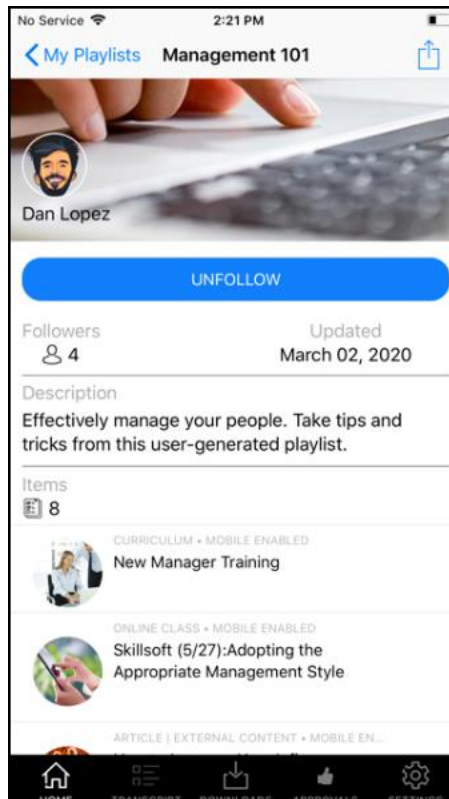
- A Playlist content carousel is available on the Learner Home page of the Learn app. Users can scroll through the carousel to view suggested playlists.
- Users can tap a playlist to access its Playlist Details page
- The title and positioning of this carousel respects the configurations made via Learner Home Preferences. [See Learner Home Preferences.](#)



## Playlist Details

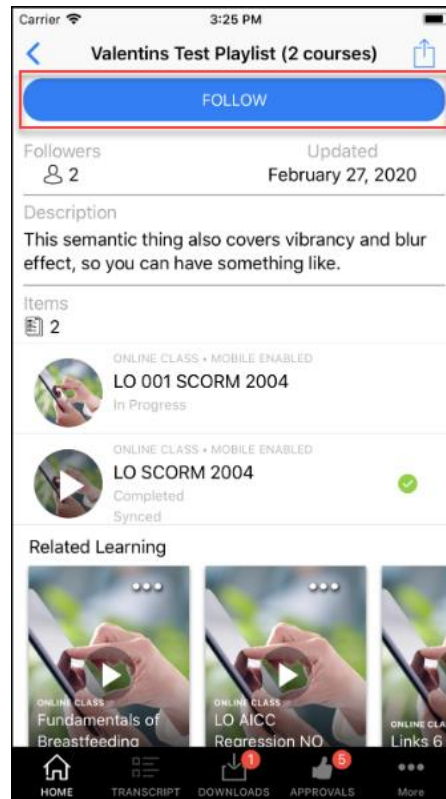
The Playlist Details page can be accessed by tapping a playlist. The Playlist Details page displays the following features:

- **Playlist Banner Image** - The banner image associated with the playlist
- **Creator Photo and Name** - The profile photo and name of the user who created the playlist
- **Follow/Unfollow buttons** - See the Follow Playlists and Unfollow Playlists sections below for more details.
- **Followers** - The number of users who are following the playlist
- **Updated** - The date on which the playlist was last updated by the creator
- **Description** - The description of the playlist
- **Items** - The number of training items contained within the playlist
- **Training** - Each training item contained within the playlist displays as a tile with the following information:
  - Training Type
  - Mobile Enabled (if applicable)
  - Training Title
  - Transcript Status
  - Synced Status (if applicable)
  - Training thumbnail image



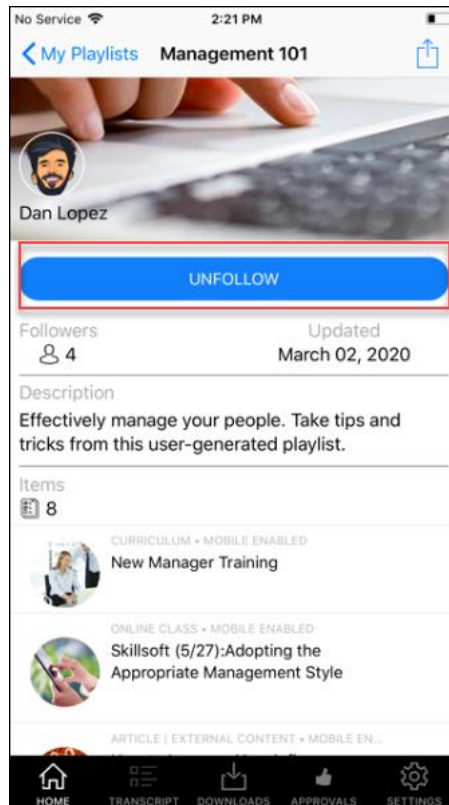
### Follow Playlists

- Users can follow any public playlist in their portal via the Learn app.
- To follow a playlist, navigate to the Playlist Details page for the playlist and tap the **FOLLOW** button. **Note:** If the user is offline, the **FOLLOW** button is disabled.



## Unfollow Playlists

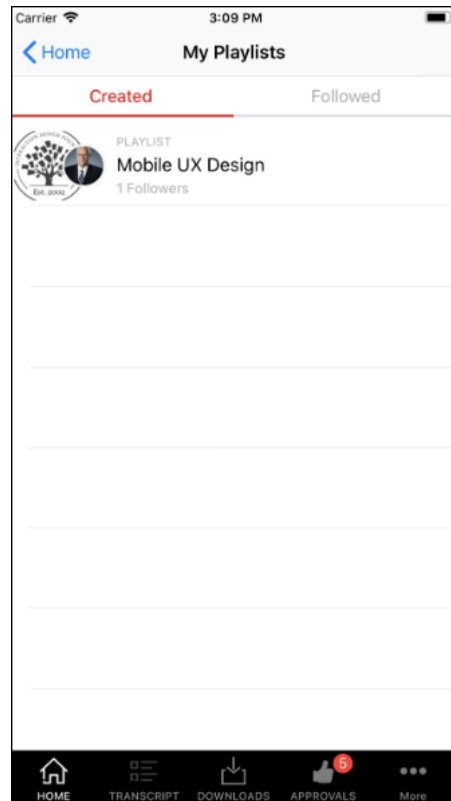
Users can unfollow playlists they have followed by tapping the **UNFOLLOW** button on the Playlist Details page for the playlist.



## My Playlists

Users can access the My Playlists page from Learner Home in both iOS and Android. For Android users, My Playlists can also be accessed from the app navigation drawer. On the My Playlists page, there are two tabs. On the My Playlists page, there are two tabs:

- **Created** - This tab shows any playlists the user has created. It is not possible to create or edit playlists from within the Cornerstone Learn app, but the user can tap their playlist to view its Playlist Details page and access actions for the playlist.
- **Followed** - This tab displays any playlists the user has followed. The user can tap a followed playlist to view its Playlist Details page and access actions for the playlist.



## Access Playlist Training

- Users can consume any mobile-enabled content contained in a playlist from within the Learn app. Available actions for the training include **Request**, **Launch**, **Complete**, **Save for Later**, and **View Training Details**, and in some cases, **Download**.
- Playlists respect the **Mobile Enabled** filter, meaning that if this filter is enabled, the user will only see playlists that are mobile-enabled on the Playlist Details page. To also see non mobile-enabled training, the user can navigate to the Settings page of the app and disable the **Show Only Mobile Training** setting.
- If a user is offline, they will only be able to consume training that was previously downloaded.

## Launch External Content

- Users can launch external content contained in a playlist from within the Learn app.

## Share Playlists

Learn app users can share playlists with others using the app. To share a playlist, navigate to the Playlist Details and tap the **Share** option to generate a deeplink and share the deeplink with other users via native iOS and Android sharing features.

The following considerations apply to playlist sharing on iOS:

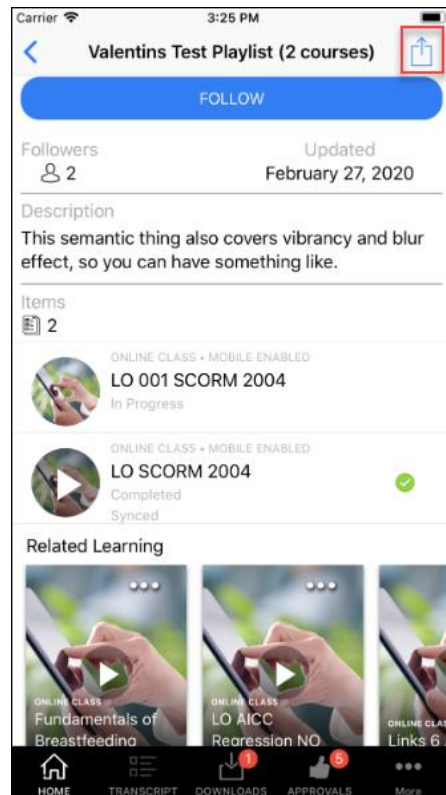
- If a user is online AND the playlist is private, the **Share** option is hidden.
- If a user is offline AND the playlist is private, the **Share** option is hidden.



- If a user is offline AND the playlist is public, the **Share** option is disabled.

The following considerations apply to playlist sharing on Android:

- If a user is online AND the playlist is private, the **Share** option is hidden.
- If a user is offline AND the playlist is private, the **Share** option is hidden.
- If a user is offline AND the playlist is public, the **Share** option is enabled. The playlist URL can be copied and shared when the user regains connectivity.



## Cornerstone Learn - Supported Devices

Cornerstone supports the native mobile application in the three most recent versions of Android and the two most recent versions of iOS. In order to use the Cornerstone Learn app for the portal, administrators users' devices must use one of the three most recent versions of Android or one of the two most recent versions of iOS.

## Cornerstone Learn - Training Description Enhancements

## Cornerstone Learn - Training Description Enhancements

With this enhancement, the following updates have been made to the Cornerstone Learn app:

- A Description label has been added to the Training Details page above the description text
- The full training description displays for training items on the Training Details page
- HTML, such as formatted text, links, images, and more display in the training description
- The training description on the approvals list will display four lines of plain text

**This enhancement is not available during UAT.**

- **[Click here to download the Cornerstone Learn for Android Starter Guide!](#)**
- **[Click here to download the Cornerstone Learn for iOS Starter Guide!](#)**

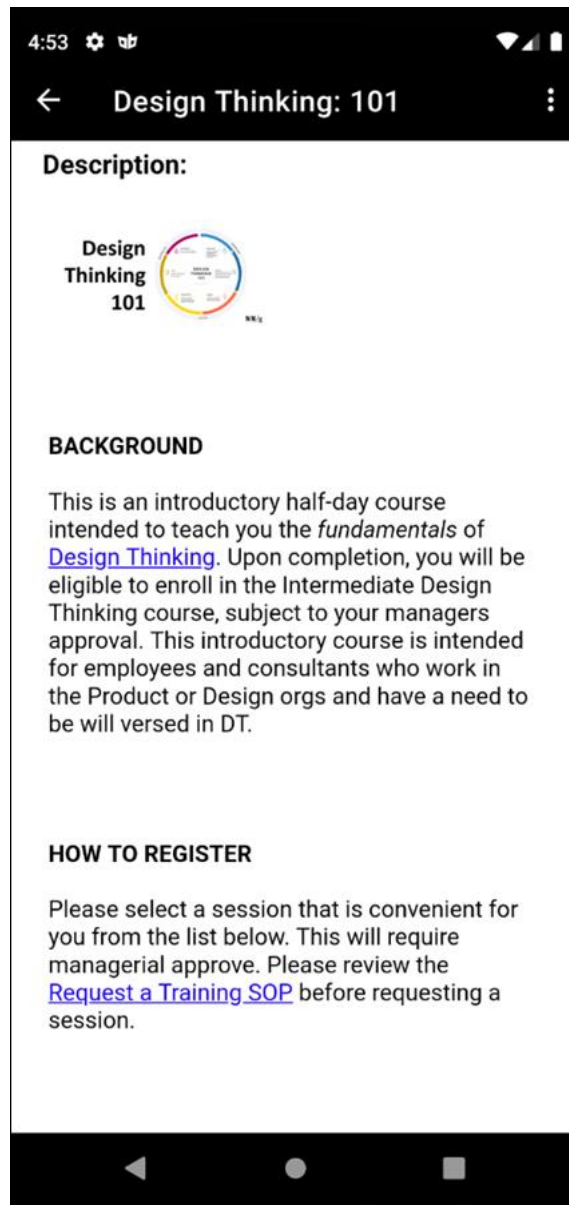
### Implementation

This functionality is automatically available to both Android and iOS users of the Cornerstone Learn app. Users must update their apps via the Apple App store or the Google Play Store in order to receive these enhancements.

## Android Learn App - Training Description

For users of the Android Cornerstone Learn app, the full training description displays on the Training Details page for each training item. If HTML features are included in the description, including formatted text, links, images, and more, these features display to the user. If the user taps a link to a Cornerstone system page that is included in the description, the link opens in the user's native device browser, and they will be prompted for their Cornerstone system login credentials.

**Note:** If no description has been configured for the training item, the Description section does not appear on the Training Details page.



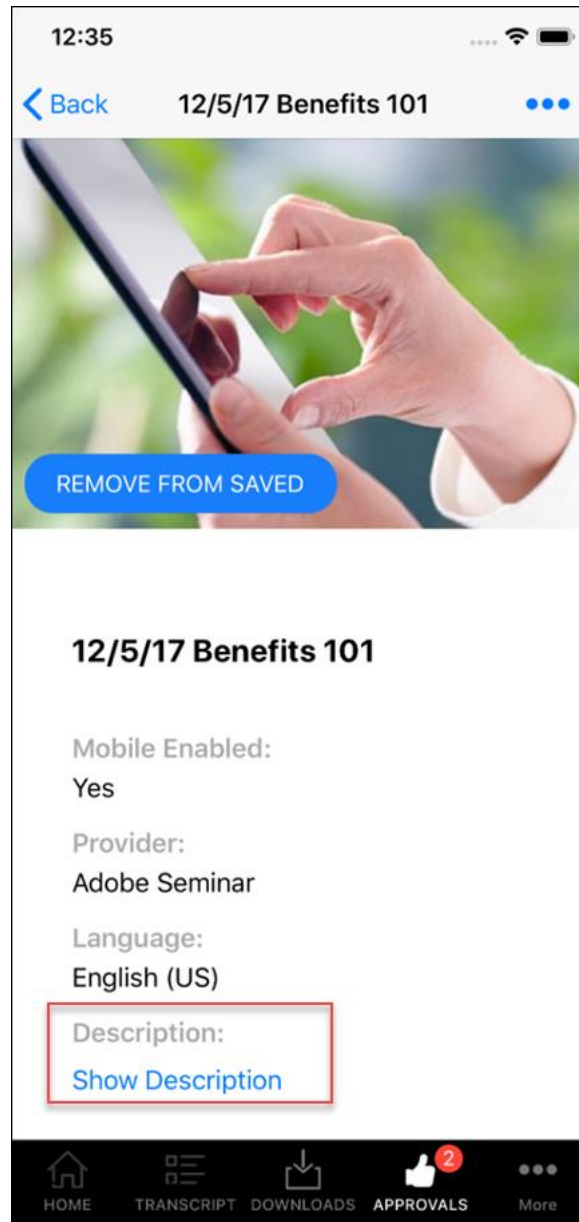
## Training Description on Approvals Page

On the Approvals page of the Learn App, training items in the list of approval requests display with up to four lines of the training description. If the description is longer than four lines, the rest of the description is truncated. To view the full description, the approver can tap the training item to be navigated to the Training Details page for the training.

For more information about the Approvals page: [See Cornerstone Learn - Approvals Tab \(Android\)](#).

## iOS Learn App - Training Description

In order to view the training description for a training item in the iOS version of the Cornerstone Learn app, the user must access the training item and tap the **Show Description** link in the Description section.



After the **Show Description** link has been tapped, a Web View displays the entire training description to the user. If HTML features are included in the description, including formatted text, links, images, and more, these features display to the user. If the user taps a link to a Cornerstone system page that is included in the description, the link opens in the user's native device browser, and they will be prompted for their Cornerstone system login credentials.

**Note:** *If no description has been configured for the training item, the Description section does not appear on the Training Details page.*

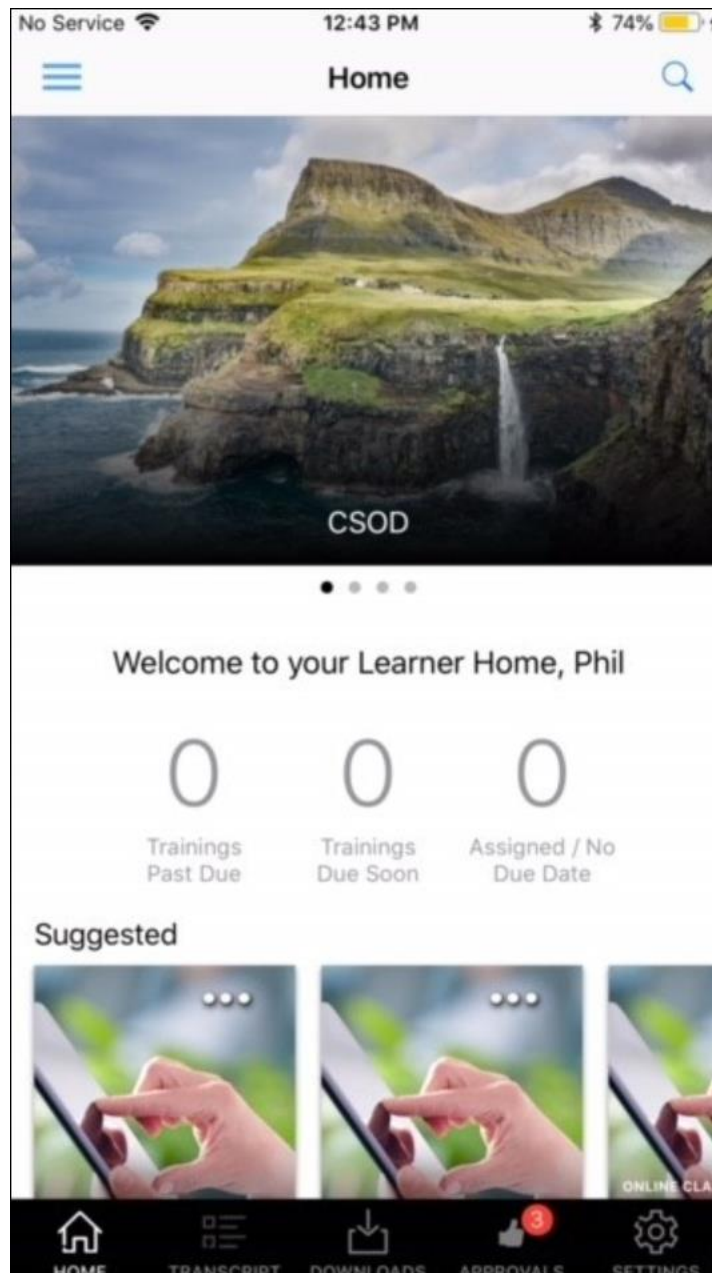
### Training Description on Approvals Page

On the Approvals page of the Learn App, training items in the list of approval requests display with up to four lines of the training description. If the description is longer than four lines, the rest of the description is truncated. To view the full description, the approver can tap the training item to be navigated to the Training Details page for the training.



## Cornerstone Learn - Training Image Displayed for Training Approvals

With this enhancement, if a thumbnail image does not exist in the Course Catalog for a training item, the image set via Default Training Image Preferences for the training type will be used as the thumbnail image for the training item on the Cornerstone Learn Approvals tab instead of a stock image. If the user taps the thumbnail image for a training item, they are navigated to the Training Details page for the training.



For information about configuring Default Training Image Preferences: [See Default Training Image Preferences.](#)

For more information about managing approval requests via the Learn app: [See \*Cornerstone Learn - Approvals Tab \(Android\)\*](#).

## Cornerstone Learn - Training Push Notifications

## Cornerstone Learn - Training Push Notifications

With this enhancement, five training push notifications have been enabled for both the Android and iOS versions of the Cornerstone Learn app, along with deeplinking capabilities which take the user to the relevant application area upon tapping the notification banner. The following push notifications are included in this enhancement:

- Training is Assigned
- Training is Due
- Training is Approved
- Training is Denied
- Training is Requested (**Note:** *This push notification is sent to the training approver for training that has been requested and requires approval.*)

These notifications were available for the legacy Cornerstone Mobile app but were not yet available for the new Cornerstone Learn app.

**This enhancement has been delayed.**

- [Click here to download the Cornerstone Learn for Android Starter Guide!](#)
- [Click here to download the Cornerstone Learn for iOS Starter Guide!](#)

### Considerations

The following considerations apply to this functionality:

- Android users will be opted into push notifications by default. This is an Android device standard.
- iOS users will be prompted to opt in to receive push notifications from the Learn App after their second app login, following the June 5th Patch. After launching the app and closing it, they will receive the prompt upon their next login.
  - If users do not opt-in, they will not receive push notifications and they will not be prompted to opt-in again. These users can, however, navigate to their iOS device settings and enable notifications from there.

### Implementation

This functionality is automatically available to both Android and iOS users of the Cornerstone Learn app. If the apps on a user's device are configured to auto-update, no action is required from the user in order to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from either the Apple store or the Google Play store.

## Training Notifications

The following training push notifications are available for both the Android and iOS versions of the Cornerstone Learn app:

NOTIFICATION TYPE	BANNER MESSAGE	RECIPIENT	REDIRECT WHEN TAPPED
Training is Approved	Training request has been approved	End User	Training Details
Training is Assigned	Training has been assigned to you	End User	Training Details
Training is Denied	Training Request has been denied	End User	Training Details
Training is Due	You have a training due soon	End User	Training Details
Training is Requested	Requested training requires your approval	Approver	Approvals List

In order for a user to receive any of the above push notifications, the corresponding email triggers need to be active and configured to include the recipient in the Email Availability settings. These triggers include:

- Assign Training
- Training Request Denied
- Training is Due (if multiple Training is Due emails are configured for a training, a user will receive all such notifications on the corresponding days)
- Approve Training Request
- Request Training

For more information about configuring email triggers via Email Administration: [See Email - Create](#).

## Considerations

The following considerations apply to push notifications for the Cornerstone Learn app:

- While there is no setting to disable push notifications in the Learn App, notifications can be disabled from your device settings at any time.
- Push notifications are disabled for multi-user devices. If more than one user shares a device, push notifications are not sent.
- If enabled, push notifications appear on the home screen of the user's device, even when they are not logged in to the app.
- All training notifications display regardless of whether the training is mobile-enabled.
- Push notifications expire and are automatically removed after one year from the date of receipt.
- If users have viewed the Training Details page of a training item for which they received a push notification, they will be navigated to the Training Details page for the training

when they tap the notification. If the user has NOT viewed the Training Details page of the item, they will be navigated to the Transcript page when they tap the notification. This is due to application cache, and this behavior will be modified in a future patch so that end users will always be navigated to the Training Details page after tapping a training push notification.

- If user is logged in to the app when they tap a push notification, they are navigated to the relevant application area, such as the Transcript, Training Details page, or Approvals list, as specified in the table above.
- If a user is not logged in to the app when they tap a push notification, they will be redirected to the login page and prompted to log in. After logging in, user will be directed to the application area, as specified in the table above.

## Curriculum Versioning Enhancements Auto-Upgraded with the October '20 Release

## Curriculum Versioning Enhancements Auto-upgraded with the October '20 Release

With the February 2020 release, numerous curriculum versioning enhancements were made available via self-activation in Production portals.

With the October 2020 release, all portals that have not manually activated these curriculum versioning enhancements will be auto-upgraded. It is strongly recommended that your organization test these enhancements in Stage prior to manual activation or the auto-upgrade in October 2020.

The following enhancements were made to improve the curriculum versioning workflow:

- New auditing capabilities
  - A new Structure History page accessible from the Course Console for curricula captures versioning and structural updates
  - A new Structure History page accessible from the transcript displays user-specific curriculum updates
- Due date recalculation logic - Due dates are only recalculated for curriculum child training items that are versioned or added to the curriculum structure (this logic is applied when the **Due X Days After Most Recent Assignment Date** option is selected for the child training in the curriculum structure)
- Expired appended training enhancement - Expired appended materials are hidden from the curriculum structure instead of remaining unactionable
- If a newer version of child training exists, the user will be upgraded to the new version instead of retaining the progress from a prior version, regardless of the child training item's sequence.

### Implementation

This functionality is auto-enabled in Stage. Pilot and Production will be opt-in using Learning Feature Activation Preferences until the October '20 release, at which point all portals will be auto-upgraded to the enhanced curriculum versioning features. Administrators should test this functionality in Stage before the functionality is enabled in Production.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated	Learning - Administration



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

## Feature Activation

In order for the curriculum compliance features included in this enhancement to be available in Production portals, it is necessary to activate the functionality via the Learning Feature Activation Preferences page.

**Important: Do not activate curriculum compliance functionality in Production until you have thoroughly tested it in Stage. Once this functionality is activated, it cannot be deactivated. This functionality is automatically enabled in Stage portals for testing.**

To access Learning Feature Activation Preferences, go to: [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES](#) and click the **Feature Activation Preferences** link.

### Permissions

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

## Activate Curriculum Compliance Functionality

In order for the curriculum compliance features in this enhancement to be available in Production portals, an administrator must activate them. To activate this functionality in your portal:

1. Click the **ACTIVATE** button in the Curriculum Compliance section. A warning message appears, asking if you are certain you want to activate this functionality in the portal.
2. Click the **ACTIVATE** button to complete the activation of curriculum compliance features in the portal. Once activated, this functionality cannot be deactivated. To exit without activating this functionality, click the **CANCEL** button.
3. Log out of the portal and log in again to receive the permissions associated with the new functionality and begin using the new curriculum compliance.

After the feature has been activated, the orange header for the section turns green to indicate the activation was successful. The **ACTIVATE** button is no longer available once the feature has been activated.

## Child Training Due Date Recalculation

Prior to this enhancement, when a child training item within a curriculum was versioned, and the **Due X Days After Most Recent Assignment Date** option was selected for child training within that curriculum structure, ALL child training due dates in the curriculum were recalculated using the versioning date as the most recent assignment date. This due date recalculation behavior also applied when a training item was added to a curriculum structure, causing the curriculum to be versioned.

With this enhancement, when a child training item within a curriculum is versioned, and the **Due X Days After Most Recent Assignment Date** option is chosen for child training within that curriculum structure, only the versioned training item's due date is recalculated using the versioning date as the most recent assignment date. All other training items that have not been versioned will retain their due date.

This due date recalculation protocol also applies to when a child training item is added to a curriculum structure, causing the curriculum to be versioned. Only the added training item will receive a relative due date that uses the versioning date as the most recent assignment date. Child training that was already inside the curriculum and not modified will retain its due date.

Employee Benefits Handbook 7.0 - Edit

General

Availability

Emails

Pricing

Training Units

**Structure**

**Structure**

Recurrence:  
When a curriculum active for recurrence is re-requested or re-assigned, the internal learning objects will be reset. Recurring curricula are allowed to have courses in common with other recurring curricula.

**Edit**

Title: z401K Enrollment

Instructions:

**B** *I* U **☰** **☷**

Design HTML

Due Date:

☒ No Due Date

☒ Due 15 Days After Most Recent Assignment Date ▼

☐ Due on

☐ Do not allow next step until due date.

Save Cancel

## Expired Appended Training

Prior to this enhancement, if a material inside a curriculum was versioned with append, both the previous version and the new version displayed in the curriculum structure. When the effective date of the new version started, the previous material version expired and was not actionable, yet it remained in the curriculum.

With this enhancement, if a material inside a curriculum is versioned with append, the previous version is hidden from the curriculum once expired, and is no longer visible on the user's transcript page by default. There is an option on both the Curriculum Player page and Training Details page to expose the expired training when needed. The expiration of the previous material version is captured on the Structure History page for curricula, which is accessible from the Course Console and the Training Details page for the curriculum. [See Structure History Page.](#)

An option to expose and hide expired training in a curriculum is available on both the Training Details page and on the Curriculum Player page for the curriculum.

## Upgrade Child LOs

Prior to this enhancement, when versioning a curriculum with the **Maintain Progress** option, child training items with a sequence of 1 within the curriculum structure were upgraded to new versions (if available) when the parent curriculum was versioned. Child training items that were in sequence 2 or greater were auto-completed with the previous version upon activation if the previous version was completed.

With this enhancement, if a newer version of child training exists, the user will be upgraded to the new version instead of retaining the progress from a prior version, regardless of the child training item's sequence. When the option to maintain progress when versioning a curriculum is selected, users maintain completions for child training items that do not have a newer version available. Child training items that have newer versions will be upgraded when they are assigned the new curriculum version.

### Example

1. Sue has Curriculum V1 on her Completed transcript.
2. Curriculum V1 contains both Material A V1 (sequence 1) in a Completed status and Material B V1 (sequence 2) in a Completed status.
3. Material A V1 is versioned to Material A V2, but Sue does not receive the upgraded version because the Completed status was not selected by the administrator during versioning.
4. Material B V1 is versioned to Material B V2, but Sue does not receive the upgraded version because the Completed status was not selected by the administrator during versioning.
5. Curriculum is now V3 because two child training items within the curriculum were versioned.
6. The administrator adds Online Course V1 (sequence 3) to the curriculum, and Curriculum V3 is versioned to V4 because of this addition. The versioning options selected include: All Versions, All Statuses, and Maintain Progress.
7. Sue receives Curriculum V4 with Material A V2 in a Registered status, with Material B V2 in a Pending Prior Training status, and Online Course V1 in a Pending Prior Training status.
8. With this enhancement, once Sue completes Material A V2, Material B V2 is in Registered status.

### Considerations

- If the administrator selected that Material A V2 requires retraining (from Material A V1), the user will receive the new version because it requires retraining. Thus, the user will be in a Registered status for Material A V2.
- If Material A V2 is set as equivalent to Material A V1, then once the user is upgraded to V2, they will auto-complete to a Completed Equivalent status.

## Structure Modification History Page

A new Structure Modification History page is accessible from both the Course Console page and the Transcript Details page for curricula. The Structure Modification History page captures an audit trail of changes made to the curriculum's structure.

**Important:** This change impacts new and existing curricula, but for the existing curricula, the Structure Modification History page is only available if the curriculum has been reverted after the Feb 7 2020 release. **Note:** *The Structure History page will populate audits for curriculum structure changes made post-activation. Historical audits made prior to activation will not display.*

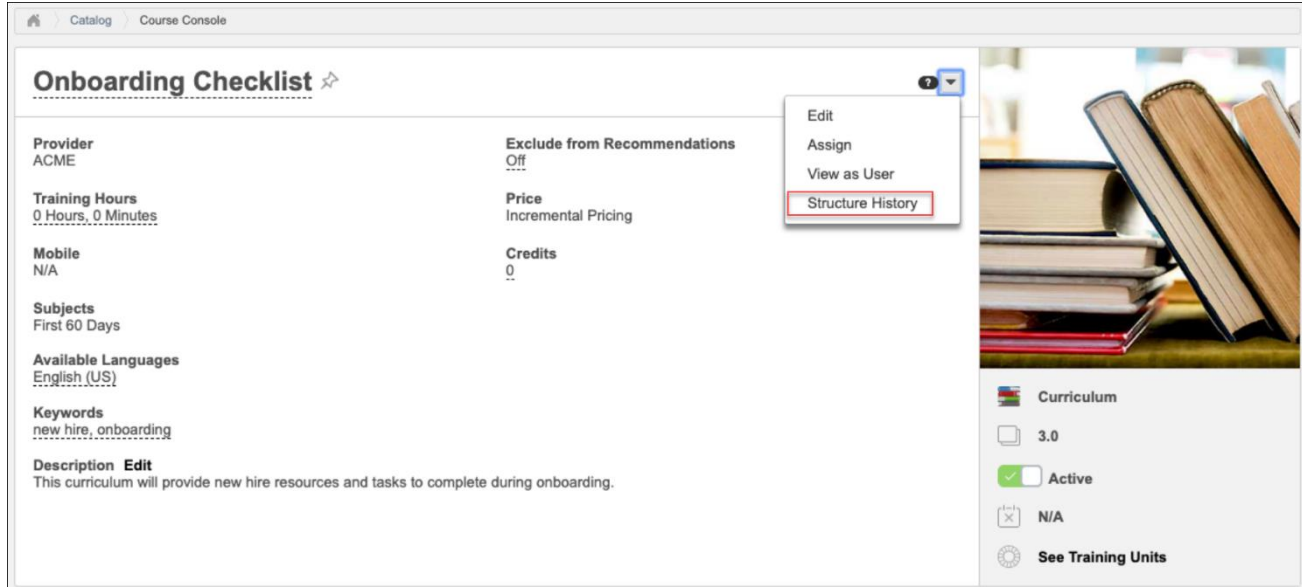
### Permissions

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

	<p>constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.</p> <p>Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	
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

## Structure History from Course Console

To access the Structure History from the curriculum's Course Console page, the administrator must have permission to access Course Console. To view the Structure History page, click the Options drop-down at the top of the Course Console page and click the **Structure History** link.




## Structure History from Transcript Details

To access the Structure History from the Transcript Details page for a curriculum, the user must have permission to view transcript items. To view the Structure History page from the Transcript Details page, click the **Structure History** link located next to the curriculum version number.

Edit Transcript Details

Training Details

Training Type: Curriculum  
Provider: ACME  
Version: 3.0 **Structure History**  
Training Hours: 0 Hours 0 Min  
Description: This curriculum will provide new hire resources and tasks to complete during onboarding.  
Status: In Progress  
Training Purpose:  
Due Date: 1/12/2020   
Expiration Date:

## Structure Modification History Page

The following features are available on the Structure Modification History page:

- **Search Bar** - Type the name of a training item included in the curriculum into the search bar to search for modification records related to that item.
- **Export** - Click the **EXPORT** button to export the information from the Structure Modification History page in PDF format.
- **Table of modifications** - The following information displays for each structure modification item in the table:
  - Curriculum Version
  - Training Title
  - Training Version
  - Training Object ID
  - Course Code
  - Effective Date (i.e. the date when a version becomes active or effective. For training types that do not version, the Effective Date will be the date the training was created)
  - Date of Change
  - Changed By
  - Change Description



## Delete Courses in Create Tool

## Delete Courses in Create Tool

Prior to this enhancement, it was not possible to delete any courses created via the Create Tool.

With this enhancement, users with access to the Create Tool can delete courses they have created and courses created by others users at their organization within the Create Tool. When a Create Tool course is deleted, the course is removed from the Create Tool and is no longer available. Upon deletion, courses published to the Learning Management System (LMS) are immediately marked as Inactive. Users who have the deleted course on their transcript can no longer access the course once it has been deleted from the Create Tool and made inactive.

**This enhancement is not available during UAT.**

**[Click here to download the Create Tool Starter Guide!](#)**

### Considerations

Courses built by Grovo cannot be deleted, but administrators can set availability for these courses via the Course Catalog and Course Console if they do not want to offer them to learners.

### Implementation

This functionality is automatically available in all portals using the Create Tool and the Learning product.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Tool	Grants access to Create Tool for content authoring. This permission cannot be constrained.	Learning - Administration

## Delete Course

On the Courses page of the Create Tool, you can manage courses created by you, courses created by your organization, and courses created by Grovo. You can delete any courses that you or someone at your organization created.

To access the Create Tool, go to: [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT](#) and click the **Create Tool** link.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Tool	Grants access to Create Tool for content authoring. This permission cannot be constrained.	Learning - Administration

Welcome Amanda!

Lessons

You successfully deleted "Lesson Template: Explain a Concept (replace this title)"

CREATE LESSON

Built by me 8 Built by amandalu 9 Built by Grovo 2794

8 lessons

Search lessons

STATUS	TITLE	LAST UPDATED	ACTIONS
Draft	Golf Explained - Run-time Basic Calls	12/19/19	Edit Duplicate Export <b>Delete</b>
Draft	Golf Explained - Run-time Basic Calls	11/21/19	Edit Duplicate Export <b>Delete</b>
Draft	CKO Learning October Release 8_14_2019	11/20/19	Edit Duplicate Export <b>Delete</b>
Draft	Lesson Template: Explain a Concept (replace this title)	11/19/19	Edit Duplicate Export <b>Delete</b>
Published	Copy of Incorporate Data and Figures Into Your Story	10/22/19	Edit Duplicate Export <b>Delete</b>
Published	IT Pro TV test course	10/01/19	Edit Duplicate Export <b>Delete</b>
Published	Spotlight, yeah. Moonlight, yeah.	9/30/19	Edit Duplicate Export <b>Delete</b>

100 | 500 per page

Page 1 of 1

## Delete

To delete a course that you or someone at your organization has created, click the **Delete** link to the right of the course. **Note:** *Courses that were built by Grovo cannot be deleted.*

Clicking the **Delete** link causes the Delete Lesson pop-up to appear, asking if you are sure you want to delete the course. You can click the **DELETE** button to confirm the deletion and remove the course from the Create Tool. If needed, you can click the **GO TO COURSE CONSOLE** button to access the Course Console page for the course. You can click the **Cancel** link and return to the Create Tool without deleting the course. Deleted courses cannot be restored.

Deleting a published course from the Create Tool results in the following:

- The course will be removed from all objectives which included the course.

- The course is automatically made inactive in the Course Catalog of the Learning Management System (LMS) and users can no longer access the course from their transcript or any other system location.
- The course remains in any assignments which include the course. To remove the course from these assignments, cancel the assignments and recreate the assignments without the deleted Create Tool course.
- If the course has been exported to another LMS, the course will no longer be accessible within that LMS.

**Note:** *If an administrator wants to make a course unavailable to users but does not want to delete it from the Create Tool, they can set availability for that course via the Course Catalog and Course Console.*

Deleting a draft course from the Create Tool results in the following:

- The course is removed from the Create Tool and this action cannot be undone.
- Because the draft course has not been made available in the system or to learners, the draft course was never included in objectives, added to users' transcripts, or included in any assignments.

## Deprecation of Proxy Enrollment API with the February '21 Release

Cornerstone's legacy Proxy Enrollment API, available as part of Cornerstone API, is scheduled for deprecation. It is being replaced by the new Learning Assignment API. The Proxy Enrollment API end-of-life is targeted to occur with the Feb 2021 Release.

End-of-life means the Proxy Enrollment API will be taken down as of the Feb '21 Release. Clients, partners, and vendors must modify their code for existing integrations that use Cornerstone's Proxy Enrollment API (/services/api/ProxyEnroll/CreateProxyEnrollment and /services/api/ProxyEnroll/ProxyEnrollmentStatus). The code should be updated to use the new Learning Assignment API instead and this should be done prior to the Feb '21 Release.

Between now and Feb '21, Cornerstone may still address defects reported with the Proxy Enrollment API, but no enhancements will be made to the API. Clients and partners using the Proxy Enrollment API are encouraged to update their code to move to the new Learning Assignment API as early as possible, but no later than Feb '21. Calls to the Proxy Enrollment API will begin to fail starting with the Feb '21 release. If you are building new integrations that require training to be assigned to users via an API, it is necessary to use the new Learning Assignment API.

The documentation for the Proxy Enrollment API will be removed from under the Foundational APIs tile in the API Explorer with the release of the new Learning Assignment API.

## ILT Session Becomes Available Email - Calendar Option

## ILT Session Becomes Available Email - Calendar Option

Prior to this enhancement, when an instructor-led training (ILT) session became available, an email was sent to the ILT instructors for the session, informing them about the available session. This email did not have an Outlook or Gmail invitation, which required the instructors to block that time on their calendars independently to avoid any future conflicts.

With this enhancement, via the Email Management page, calendar options can be configured for ILT Session Becomes Available emails, allowing instructors to add the calendar invitation for the session directly to their calendar.

### Implementation

This functionality is automatically available in all portals using the Learning module.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

## Configure Calendar Options

To configure calendar options for the ILT Session Becomes Available email, go to: [ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT](#). Search for the ILT Session Becomes Available action and expand the templates for that action. Click the **Edit** or Copy icon for the template with "Session instructors" listed in the Recipient column.

### Permission

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration



Tools > Core Functions > Edit Email

## Edit Email

Create e-mails using the fields below. For help, [click here](#).

[Search Pop-Up Page](#) [Remove](#)

Note: Files uploaded through the Image or Document Manager will be stored on a publicly accessible server. The upload limit (per file) for images, documents, and templates is 3MB.

☐ Send emails using default language (English (US)) when preferred language is not available.  
Note: You may only change the default language during copy/create.

**Action**  
**Email Title (English (US))**  
**From Address**  
**Reply-To Address**  
**Type**  
**Calendar Options**  
**Email Format**

ILT Session becomes Available  
 ILT Session becomes available  
 ces.mail@csod.com  
 ces.mail@csod.com  
 Confirmation  
 Meeting invite ☒ Calendar attachment ☐ None  
 Reminder (Outlook only): 15 minutes  
 Outlook ☒ Other (Gmail, Yahoo, etc.)

**Tags**  
**Condition**

Display a list of tags that can be used in the condition.  
 Email is sent if the Condition is either not defined or is TRUE. (Example: CURRENT.REGISTRATION > MIN.REGISTRATION, OR CURRENT.REGISTRATION == MIN.REGISTRATION )

Please select users to receive this email.

**Send To**  
**Cc**  
**Availability**

User or  
 Session instructors  
 (A separate email will be sent to each recipient listed)  
 User or  
 (These users will be copied on the emails sent out to each recipient)  
 Restrict the availability of this email to the following OUs  
 Select Criteria

## Configure Calendar Options

In the Calendar Options section, the following options allow you to configure the calendar invitation included in the ILT Session Becomes Available email sent to instructor-led training (ILT) instructors:

- **Meeting invite** - This option sends the email as a meeting invite with the standard meeting options. For Google Calendar meeting invites, the event is automatically added to the user's calendar and set to busy even if no response is provided. The meeting responses do not affect the user's registration status in the system. The event description displays the body of the email trigger. The maximum number of characters that will be displayed in the event description is 8,192. Any additional characters are removed. Any users in the CC field also receive a meeting invite.
  - Yes - Selecting this option keeps the event on the user's calendar with a Yes status.

- Maybe - Selecting this option keeps the event on the user's calendar with a Maybe status.
  - No - Selecting this response removes the event from the user's calendar. This does not affect the user's registration status.
- **Calendar attachment** - Selecting this option sends the email with a calendar attachment. When the attachment is opened and saved, the session is automatically added to the user's calendar.
- **None** - This option is selected by default. Selecting this option sends the email without calendar features.
- **Reminder (Outlook only)** - The reminder functionality only applies to Outlook meetings. A reminder of the meeting will display to outlook users at a specified time prior to the start of the meeting.

## Learner Home - Subject Banner Toggle

## Learner Home - Subjects Banner Toggle - Overview

On the Learner Home page, a Subjects banner displays to users, prompting them to add subjects they are interested in so Learner Home can recommend relevant training to them in the future. The Subjects banner displays over any custom banners configured for the Learner Home page, and prior to this enhancement, the Subjects banner continued to display over the custom banners until the user either added subjects or dismissed the Subjects banner using the X icon.

As of the March 6, 2020 patch, administrators can deactivate the Subjects banner by division via the Learner Home Preferences page. The Subjects banner will be enabled by default, but if the banner is deactivated by an administrator, it will no longer display on the Learner Home page for users within the selected divisions. If an administrator later enables the Subjects banner again, it will display to users unless the user has already dismissed the banner or added subjects.

[Click here to download the Learning Search and Learner Home Starter Guide!](#)

### Use Case

Javi, a learning administrator, oversees the training content in ACME's Learning portal, and this content is exposed to users via Learner Home. Using the Learner Home Preferences page, Javi often creates custom banners for Learner Home to help advertise specific training to his users. Hoping to heavily promote a new learning series, Javi also opts to deactivate the Subjects banner on the Learner Home page so that even users who have not added subjects or dismissed the Subjects banner will see his custom banners promoting the new training content instead of the overlaid Subjects banner. After a few weeks, when Javi is finished promoting the new training, he reactivates the Subjects banner to continue encouraging users to add subjects.

### Implementation

This functionality is automatically available to all portals using the Learning module.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home Preferences	Grants access to the Learner Home Preferences page, where the administrator can configure the arrangement of content on Learner Home, as well as other settings. This permission can be constrained by organizational unit (OU) and User's OU. This is an administrator permission.  With the Aug 2019 release, this permission also grants access to the Learning Search Preferences	Learning - Administration

page, where the administrator can configure Learning Search options.
----------------------------------------------------------------------

## Learner Home Preferences - Subject Banner

On the Learner Home Preferences page, administrators can set the display order of Learner Home content and add custom banners and cover images to the Learner Home page. With this enhancement, administrators can also enable and disable the Subjects banner from this page.

To access Learner Home Preferences, go to [ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > LEARNER HOME PREFERENCES](#). Select the division for which you want to configure preferences.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learner Home Preferences	<p>Grants access to the Learner Home Preferences page, where the administrator can configure the arrangement of content on Learner Home, as well as other settings. This permission can be constrained by organizational unit (OU) and User's OU. This is an administrator permission.</p> <p>With the Aug 2019 release, this permission also grants access to the Learning Search Preferences page, where the administrator can configure Learning Search options.</p>	Learning - Administration

Image #3

Status: Disabled (Missing Image)

▼

Image #4

Status: Disabled (Missing Image)

▼

Subjects Banner

When enabled, the Subjects Banner that prompts users to add Subjects if they have not previously done so will display over Custom Banners, unless they have already added Subjects or have manually closed the banner. When disabled, the Subjects Banner will not display over Custom Banners.

☒ Enable the Subjects Banner.

Training Side Bar

When enabled, the side bar that show training that is past due, due soon, or assigned with no due date will display on the left hand side of the page.

☒ Enable Training Side Bar display.

Training Hours Calculation

☒ Cumulative (all time)
 ☐ Mirror Transcript

▲

## Enable or Disable the Subjects Banner

To disable the Subjects banner and prevent it from displaying to users on the Learner Home page, toggle the **Subjects Banner** switch to the Off position. The Subjects banner is enabled by default but can be deactivated at any time. If an administrator re-enables the Subjects banner after it has been disabled, users will again see the Subjects banner on their Learner Home page **unless** the user has already added subjects or has previously dismissed the Subjects banner by clicking the X icon within the banner.

## Deprecation of Legacy Learning Details Page with the October '20 Release

In 2019, a redesigned Learning Details page was made available as an Early Adopter project, and has continued to evolve toward feature parity with the legacy version of the Learning Details page. With the October 2020 release, the legacy version of the Learning Details page, previously referred to as "Training Details" or "LO Details," will be deprecated for training types which are supported by the redesigned Learning Details page, including:

- Curricula
- External Content
- Materials
- Online Courses
- Tests
- Videos
- Events & Sessions

During the August 2020 release, administrators can opt out of using the new page in their learning portals and continue to use the legacy page, but with the October 2020 release, this option will be removed and all portals will be automatically upgraded to the new Learning Details page for all supported training types.

For more information about the new Learning Details page: [See Learning Details Page \(Early Adopter\)](#).

## Considerations

The legacy Learning Details page will no longer be supported or enhanced for the training types supported by the new Learning Details page.

The legacy Learning Details page will continue to be supported for the following training types:

- Certifications
- Cohorts
- Libraries
- Postings



## Learning Details Redesign (Early Adopter) Enhancements

## Learning Details Redesign (Early Adopter) Enhancements - Overview

In 2019, a redesigned Learning Details page was released as an Early Adopter enhancement. With the May 2020 release, the Learning Details page is still in an Early Adopter status, and the following additional enhancements have been made to this feature:

- Display Currently Registered/Max Available Space (released with the March 6 patch)
- Display Locator Number and Year (released with the March 6 patch) - **Note:** *The visibility of the Locator Number is dependent on an ILT Preferences setting, which controls Session ID and Locator Number visibility.*
- Strikethrough Logic for Pricing (released with the April 3 patch)
- Learning Details Preferences (Targeted for the June 5 patch)
  - Ability to control data display
  - Page enablement (existing functionality)
- One Waitlist Per Person Per Event
- Improved Workflow for prework, postwork, and prerequisites
- **View Prerequisites** primary action improved (targeted for a post-release patch)
- Enhanced Visual Design (delayed until the Aug 2020 release)
- Enhanced Curriculum Contents (targeted for a post-release patch)

### Considerations

The redesigned Learning Details page is only available for the following training types:

- Curricula
- Events and Sessions (new)
- External Content
- Materials
- Online Courses
- Tests
- Videos

The following training types are NOT currently scheduled to be updated to the new Learning Details page design:

- Certification
- Cohort
- Forms
- Libraries
- Observation Checklists
- Posting
- Quick Courses

### Exclusions and Considerations

The following Learning Details exclusions apply to ALL supported training types:

- Anonymous Browsing is not yet supported. This means that any configured self-registration workflows will continue to direct to the legacy Learning Details page
- No training types can be added to a Training Plan via the Learning Details page
- Badges are not supported on the Learning Details page by any training type (this does not affect Badge functionality elsewhere in the system)
- The ability to edit or delete ratings and reviews is not supported on the Learning Details page

The following Learning Details exclusions apply to VIDEO training items only:

- Video preview functionality is not supported

The following Learning Details considerations apply to EVENTS and SESSIONS only:

- Session Details - Sessions no longer have a dedicated Details page. Session details are now found in the Session flyout when the **View Details** link is clicked for a session
- Sessions Display - The Upcoming Sessions list for an event now displays all sessions available to the user
- **View Full Calendar** link - This link, which is available for the legacy Event Details page, is NOT available when viewing the new Learning Details page for an event
- Add to Waitlist - Users are no longer prompted with a pop-up to confirm whether they want to be added to the waitlist. Instead, they can access a **Add to Waitlist** link, which if clicked, immediately places them on the waitlist and redirects them to their transcript page
- The following metadata does not display for events and sessions on the Learning Details page:
  - Objectives

## Implementation

The Learning Details page can be enabled via self-service in any portal using the Learning module, for supported training types. The new Learning Details page can be enabled via a new preferences page by an administrator with permission to configure these preferences.

- For information about enabling the Learning Details page in your portal: [See Learning Details Preferences](#).

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assign Training	Grants ability to assign learning objects to the transcripts of those for whom the user is the assigned	Learning

	manager, approver or cost center approver. This is a manager/approver permission.	
Course Catalog - Update	<p>Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an <b>Edit Training</b> option for training items included as objectives in Development plans.</p> <p>This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission.</p> <p><b>Note:</b> Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.</p>	Learning - Administration
LO Attachments - Manage	Grants ability to upload attachments to learning objects. Administrators with this permission are automatically granted the LO Attachments - View permission. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
LO Attachments - View	Grants ability to view the learning object attachments that are set to be available to administrators. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Playlists - Create	Grants ability to create private Learning Playlists. This permission cannot be constrained. This is an end user permission.	Learning - Administration

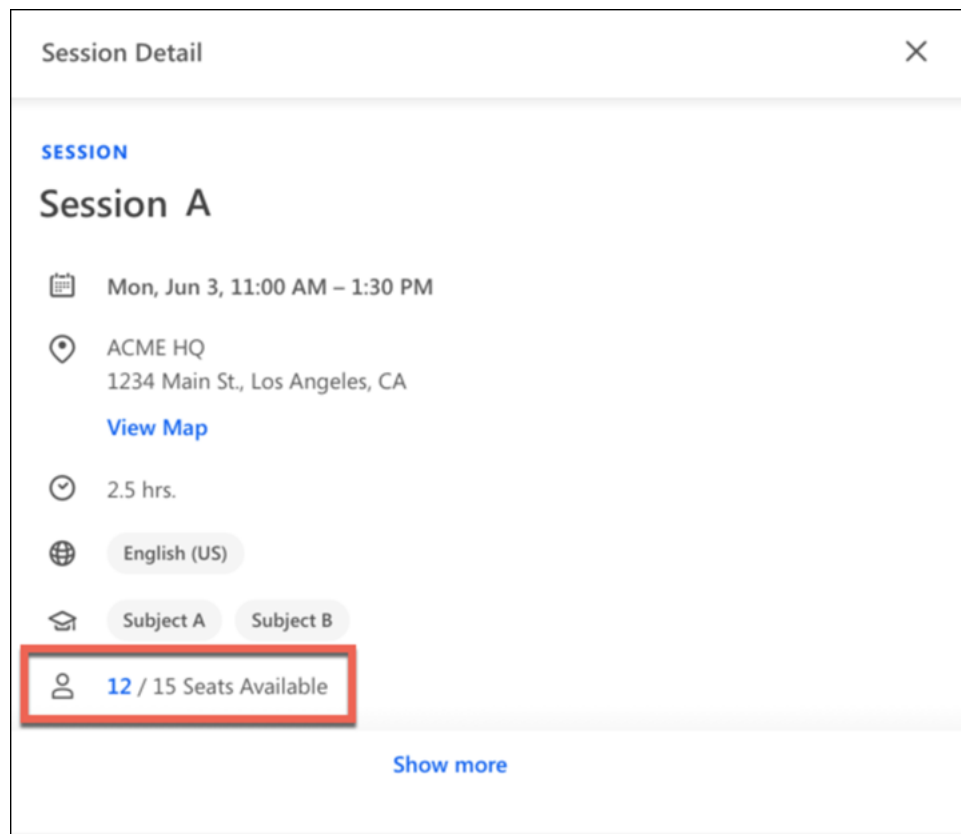
View Transcript Item	Grants ability to view details of learning objects that appear on the transcript (training record), by clicking on the name of the learning object. Users must also have the Bio About - View permission in order to access the transcript within Universal Profile. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, or User's Self. This is an end user permission.	Learning - Administration
Display all Training Custom Fields	Enables display of all training custom field values including blank fields when viewing details of training on transcript. Without this permission, the custom field will only appear if it is populated with a value. This is an end user permission.	Learning

## Learning Details Redesign (Early Adopter) - Seats Available and Max Available Space

As of the March 6 2020 patch, the session flyout on the Session Details page displays the number of currently registered users and the max available space.

### Seats Available

In the Session flyout for a session, the number of currently registered users displays with the total number of seats available. If no seats are currently available, the phrase "No seats available" displays in the Session flyout for the session instead.



## Learning Details Redesign (Early Adopter) - Locator Number

As of the March 6 2020 patch, the session flyout on the Session Details page displays the Locator Number and year.

### Session Locator Number and Year

When available, the session Locator Number displays under the session title in the Session flyout. The year will also be included in the dates for the session.

**Note:** The visibility of the Locator Number is dependent on an *ILT Preferences setting*, which controls *Session ID and Locator Number visibility*.

Session Details

SESSION

13196

Sun, Feb 21, 2021, 3:00 PM - 7:00 PM PST

Register By Sun, Feb 21, 2021, 3:00 PM PST

! Cm Facility

2313 Parkwood Ct, Santa Rosa, CA, USA 95409

4 hours

English (US)

! 4/29 subject

1 out of 2 seats available

275

## Learning Details Redesign (Early Adopter) – Strikethrough Logic for Pricing

As of the April 3 patch, event and session prices display with a strikethrough on the Learning Details page if the user viewing the page has the event or session included in a subscription. The strikethrough helps make it clear to the user that they do not need to pay the standard price for the event or session, as it is already included in their subscription. The strikethrough logic applies to both the Upcoming Sessions section of the Learning Details page and also the Session flyout.

Last Updated 03/11/2020

**Details**

Show More

**Upcoming Sessions**

Date (Ascending) ▾ 2 Sessions

**APR**

**4**

Sat, Apr 4, 2020, 8:30 AM - 5:30 PM GMT

Saint Mary's Church in the hollow of white hazel near a rapid whirlpool and the Church of Saint Tysilio near the red cave

English (US)

~~\$390.00 (£390.00)~~

View Details ▾

12 seats available

**DEC**

**10**

Thu, Dec 10, 2020, 8:30 AM - 5:30 PM PST

Cornerstone Admin Location

English (US)

~~\$65.00 (£65.00) | 31.00 Training Units~~

View Details ▾

12 seats available

**SubscriptionTest**

Select a Session ▾

or

Assign



## Learning Details Redesign (Early Adopter) - Preferences

The Learning Details Preferences page was previously made available with the ability to control which training types for which the Learning Details page was enabled. With the May 2020 release, the Learning Details Preferences page will be enhanced to allow administrators to control visibility of the data that displays on the Learning Details page.

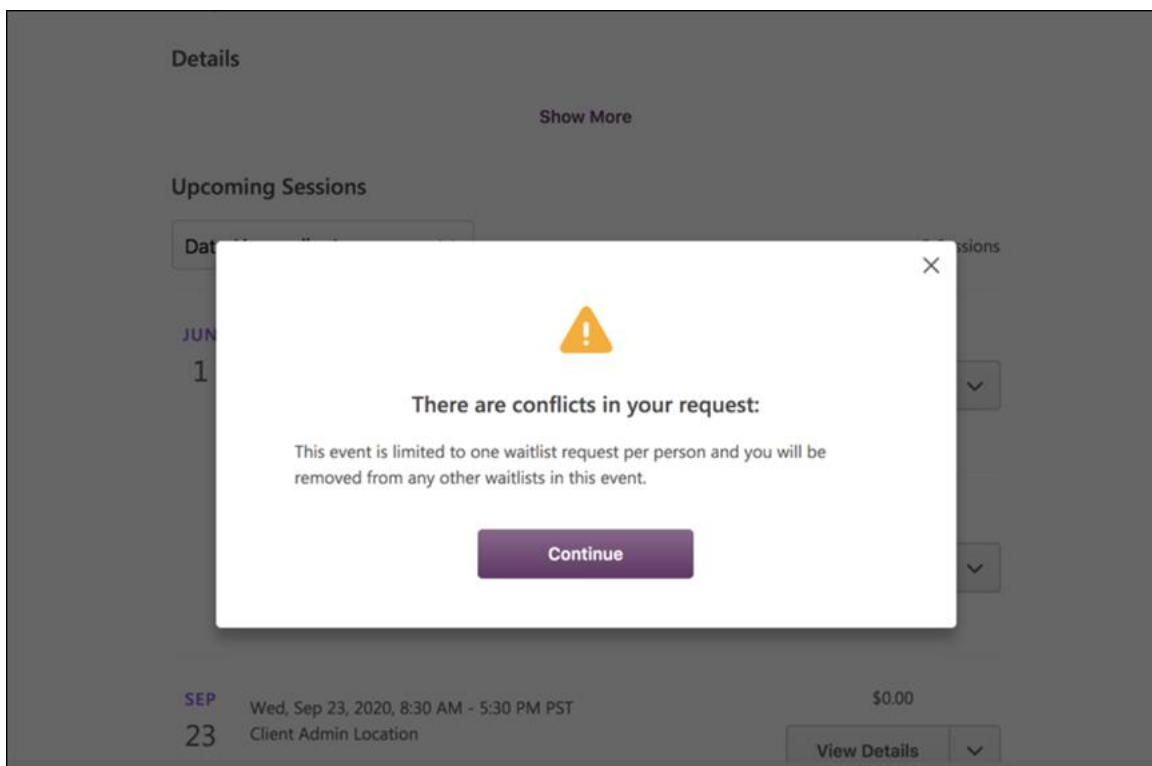
Learning Details Preferences enhancements will be made available with the June 5th patch, and more documentation for these features will also be made available at that time.

## Learning Details Redesign (Early Adopter) - One Waitlist Per Person Notification

With this enhancement, when a learner is already on the waitlist for an instructor-led training (ILT) session and then the learner attempts to add themselves to the waitlist for another session within the same event, a notification appears, stating that the event is limited to one waitlist per person. The learner must then acknowledge that if they proceed, they will be removed from the other waitlist.

If the user clicks the **CONTINUE** button, they will be removed from the waitlist they were already on, and then they will be added to the waitlist for the selected session of the event.

**Note:** This behavior only applies in portals where the ILT Preference setting *Limit Users to One Waitlist Per Person* is configured. [See ILT Preferences - General](#).



## Learning Details Redesign (Early Adopter) - Optimized Workflow for Pework, Postwork, and Prerequisites

Prior to this enhancement, even if a user was registered for a training item, the user might not be able to take action on pre-work, post-work, and prerequisites associated with that training item if the user was not included in the availability for those items. This led to confusion and prevented users from completing the training item for which they were registered.

With this enhancement, when a user has a status of registered or higher for a training item that contains pre-work, post-work, or prerequisites, that user can take action on the associated pre-work, post-work, or prerequisites regardless of the availability set for those items.

## Learning Details Redesign (Early Adopter) - View Prerequisites

When a training item has a required prerequisite, the primary status for the training item is **View Prerequisite**. Prior to this enhancement, when a user clicked the **View Prerequisite** option, they were navigated to the Transcript Details page for the training.

With this enhancement, when a user clicks the primary action **View Prerequisite** for a training item accessed from a system area where transcript actions are available, the user will be navigated to the Prerequisite section of the Learning Details page. This enhancement applies to supported training items accessed from the following system locations:

- Transcript
- Transcript Details
- Learner Home
- Learning Search
- Learning Details
- Welcome Page
- Browse for Training
- Playlist

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

### Considerations

This behavior only applies when the new Learning Details page is enabled for the training type accessed by the user. For example, if the new Learning Details page is enabled for curricula but not events and sessions, clicking the **View Prerequisite** action for a curriculum would direct to the Prerequisite section of the new Learning Details page for the curriculum, whereas clicking the **View Prerequisite** action for an event would direct to the Transcript Details page for that event.

## Learning Details Redesign (Early Adopter) - Enhanced Visual Design

With this enhancement, numerous enhancements have been made to the visual design of the Learning Details page, including the addition of thumbnail images for training with custom images and small general user interface (UI) enhancements.

This enhancement has been delayed to the August 2020 release, and additional documentation will be made available at that time.

## Learning Details Redesign (Early Adopter) - Enhanced Curriculum Contents

Prior to this enhancement, the contents of a curriculum displayed as a flat structure on the Learning Details page, even if the curriculum was configured with nested levels.

With this enhancement, if a curriculum is configured with nested levels, that structure is represented for one level on the Learning Details page.

This enhancement will be made available in a post-release patch, and additional documentation will be made available at that time.

## Localizing the Create Tool

## Localizing the Create Tool

Prior to this enhancement, the Create Tool was only available in English (US).

With this enhancement, the Create Tool displays to users in their own display language if the user's display language is one of the following supported languages:

- French
- German
- Spanish
- Italian
- Dutch
- Chinese (Traditional)
- Chinese (Simplified)
- Japanese

If a user's display language is not yet supported by the Create Tool, the Create Tool will display in English (US). Users can also manually switch the Create Tool to another supported language if needed.

**This enhancement is not available during UAT.**

**[Click here to download the Create Tool Starter Guide!](#)**

### Considerations

Additional supported display languages will be added in future releases.

### Implementation

This functionality is automatically available in all portals using the Create Tool and the Learning product.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Tool	Grants access to Create Tool for content authoring. This permission cannot be constrained.	Learning - Administration



## Create Tool - Change Language

The Create Tool automatically displays to users in their own display language if the user's display language is a language supported by the Create Tool, but users can also manually switch the Create Tool to another supported language if needed.

To access the Create Tool, go to: [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT](#) and click the **Create Tool** link.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Tool	Grants access to Create Tool for content authoring. This permission cannot be constrained.	Learning - Administration


The screenshot shows the 'Courses' page in the Cornerstone Learning system. In the top right corner, there is a user menu with a profile icon and the text 'Cornerstone...'. Below this, there are two links: 'Personal settings' (which is highlighted with a red box) and 'Sign Out'.

## Personal Settings

To manually change the language of the Create Tool:

1. Click the drop-down icon next to your username in the upper-right corner of the page.
2. On the Personal Settings page, click the **Preferred Language in Create Tool** drop-down menu and select another supported language.
3. Click the **SAVE CHANGES** button at the bottom of the page.

The entire Create Tool, including the Lessons page and the Create Lesson workflow, will display in the language selected on the user's Personal Settings page. The user can change the language of the Create Tool at any time. **Note:** *If a user manually changes their preferred language for the Create Tool and then later updates their preferred language for the Cornerstone system, the language selected for the Create Tool does NOT change.*

 Amanda

Personal Settings

Language

Preferred language in Create Tool ⓘ

English (US)

SAVE CHANGES

CANCEL

## Back-end Optimizations to Learning Searches

Beginning in Q2 of 2020, Cornerstone will begin backend optimizations to improve Learning searches. No changes to Learning search features should be observed by administrators or end users. Search queries and results are expected to match the existing experience.

## Machine Learning Preferences Enablement for CDG4 Swimlanes

Prior to this enhancement, the Machine Learning Preferences page was not available for secure swimlane organizations due to security concerns.

As of the March 6, 2020 patch, a limited version of the Machine Learning Preferences page is now enabled for CDG4 organizations. Of the two existing options on the Machine Learning Preferences page, including **Content Filtering** and **Cross-Portal Content Recommendations**, only the **Content Filtering** option is available for CDG4 organizations. The **Cross-Portal Content Recommendations** option remains permanently disabled and unavailable to CDG4 organizations due to security concerns.

For more information about the Machine Learning Preferences page: [See Machine Learning Preferences](#).

### Implementation

This functionality is automatically available in all CDG4 client portals using the Learning module.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Machine Learning Preferences	Grants ability to access the Machine Learning Preferences page. This is an administrator permission.	Learning - Administration

## New Email Tag - Link to Instructor Request Page

## New Email Tag - Link to Instructor Request Page

When a session is created, an instructor is added to the session. Prior to this enhancement, when a confirmation was required from an instructor to determine whether they accept the session, a Request Instructor email was sent to the instructor. The instructor then needed to log into the system and search for the request on the View Instructor Request page and then respond to the session request.

With this enhancement, a new INSTRUCTOR.REQUEST.LINK email tag is available for Request Instructor emails. This tag displays as a link in the email which navigates the instructor to the request page for the specific session, allowing the instructor to quickly respond. This tag is SSO-enabled but is also usable by organizations not using SSO.

### Implementation

This functionality is automatically available in all portals using the Learning module.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

## Request Instructor Email - Instructor Request Tag

The INSTRUCTOR.REQUEST.LINK email tag can be added to Request Instructor emails via Email Administration.

To add a tag to a Request Instructor email, go to: [ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT](#). Search for the Request Instructor action and click the Add Email icon next to the action.

### Permission

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Tags are replaced with the corresponding values when emails are sent.

**Tags**  
 Subject (English (US))

Instructor Request

Language
 

English (US)

HTML Plain Text

A Verdana 10pt Normal Zoom

B / U abc

Dear INSTRUCTOR.FIRST.NAME INSTRUCTOR.LAST.NAME: You have been requested to instruct the following training session: Training Title: TITLE Session or Online Class Number: TRAINING NUMBER Training Type: TRAINING TYPE Description: TRAINING.DESCRPTION Instructor Role: INSTRUCTOR.ROLE Start Date: SESSION.START.DATE SESSION.START.TIME End Date: SESSION.END.DATE SESSION.END.TIME Session Duration: DURATION Request Date: ACTION.DATE  
  
 To confirm this session, click here: INSTRUCTOR.REQUEST.LINK

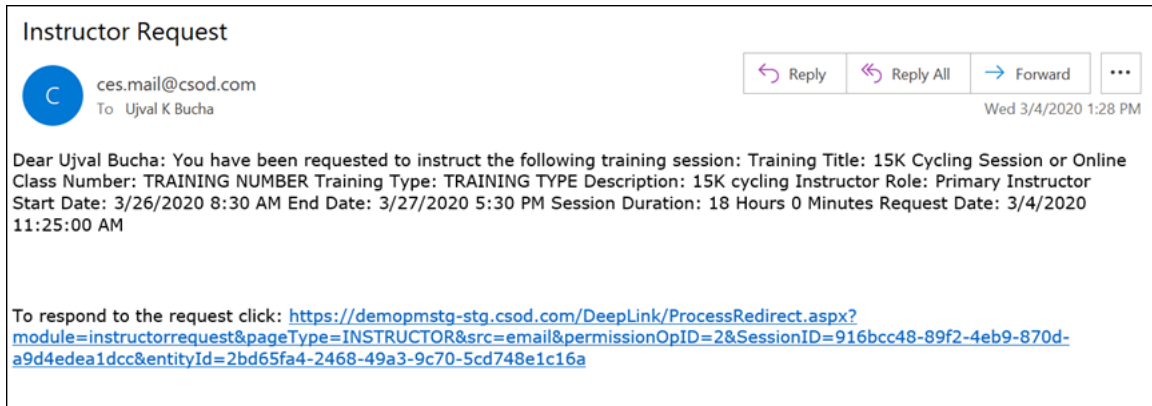
Design HTML Preview

Words: 53 Characters: 493

Cancel Save

## Add Tag to Email

To add a link to the View Instructor Request page to a Request Instructor email, add the INSTRUCTOR.REQUEST.LINK tag to the message. Save the email after configurations are complete. When instructors receive this request email, they will see a link instead of a tag. Clicking this link navigates them to the View Instructor Request page for the session. The instructor can then respond to the request. **Note:** *This link is SSO-enabled, but can also be used by organizations that do not use SSO.*





## New Email Tag - Withdraw from Session

## New Email Tag - Withdraw from Session

Prior to this enhancement, if a learner wanted to withdraw from an instructor-led training (ILT) session, it was necessary for the learner to log into the system, navigate to their transcript, search for the session, and then manually withdraw. Some users erroneously thought that if they declined the email invitation for the session, they would be automatically withdrawn, leading to confusion.

With the June 5 2020 patch, a new WITHDRAW.SESSION.LINK email tag is available for ILT Session Register emails. The WITHDRAW.SESSION.LINK tag is SSO enabled but is also available for non-SSO enabled portals. This tag displays as a link in the email, and if the user clicks the link, they are navigated to the Cancel Registration page of the selected event. The learner then only needs to select a reason for their withdrawal. This new tag allows administrators to save their users time and deliver a better ILT user experience.

### Implementation

This functionality is automatically available in all portals using the Learning module.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

## Session Registration Email - Withdrawal Link Tag

The WITHDRAW.SESSION.LINK email tag can be added to ILT Session Register emails via Email Administration.

To add a tag to a Session Registration email, go to: [ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT](#). Search for the ILT Session Register action and click the Add Email icon next to the action.

### Permission

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

Cc

User or

Add

(These users will be copied on the emails sent out to each recipient)

Restrict the availability of this email to the following OUs

Availability

Select Criteria

Tags are replaced with the corresponding values when emails are sent.

Tags

Display a list of tags that can be used within the subject and body of the e-mail

Subject (English (US))

ILT Register - student's copy

Language

English (US)

HTML Plain Text

A
Verdana
10pt
Normal
Zoom

B
I
U
abc

x<sup>2</sup>
x<sub>2</sub>
Aa

Dear TRAINEE.FIRST.NAME TRAINEE.LAST.NAME: You have registered for the following training item:  
Title: TITLE Training Type: TRAINING.TYPE Class Description: TRAINING.DESCRPTION Training  
Hours: DURATION Training Credits: CREDITS Price: PRICE Vendor's Name: VENDOR.NAME

To withdraw from a session, click: WITHDRAW.SESSION.LINK

Thank you for registering.

Best,

Emily Morris

Design HTML Preview

Words: 42 Characters: 369


Cancel

Save

## Add Tag to Email


To add a session withdrawal link to an email, add the WITHDRAW.SESSION.LINK to the message. Save the email after configurations are complete. When learners receive this registration email, they will see a link instead of a tag. Clicking this link navigates them to the Cancel Registration page for the selected event. The learner must select a reason for withdrawal and then submit the withdrawal on this page. **Note:** This link is SSO-enabled, but can also be used by organizations that do not use SSO.

## You have been Registered for 10K Cycling



TrainingAdministrator@CSOD.com

To Ujval K Bucha



30bdd1b2-4897-472e-8a84-f020a6ea0210.ics  
4 KB

Reply

Reply All

Forward

...

Fri 2/28/2020 8:17 AM

Dear Ujval Bucha:

You have registered for the following training item:

Title: 10K Cycling  
Class Description: Cycling event around Venice beach  
Vendor's Name: ESPN  
Session Location: Cornerstone Admin Location  
Start Date: 5/13/2075 3:30 PM

View Training Record: [Click Here](#)

To withdraw from the session click : <https://demopmstg-stg.csod.com/DeepLink/ProcessRedirect.aspx?module=withdrawsession&src=email&sessionID=d5db032e-c1be-41b6-a1d6-d2b76efd00fe&transcriptUserID=%255e%255e%255ezzeeh%252fYuQGURkoV57Qsmw%253d%253d>

Thank you for registering,

The Training Team.

## Reporting Fields - Learning

## Reporting Fields - Learning - Overview

With the May 2020 release, the following enhancements have been made to Learning reporting:

- New certification fields are available in Reporting 2.0 (released with the March 6 patch)
- New **Archived from Transcript? (Curriculum)** field is available in Reporting 2.0 (released with the March 6 patch)
- A **Past Due Aging** filter is available in learning reports that utilize this field
- The **Completed SCOs %** field has been renamed as **Course Progress %**

## Implementation

This functionality is automatically available to organizations using the Learning module and Reporting 2.0.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Certification Report - Create	Grants ability to create and edit Custom Certification reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Direct Subordinates.	Reports - Analytics
Custom Certification Report - View	Grants ability to view results of Custom Certification reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Direct Subordinates.	Reports - Analytics
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

## Archived from Transcript

As of the March 6th patch, the **Archived from Transcript? (Curriculum)** field is available in Reporting 2.0. This field was previously only available in Custom Reports.

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Archived from Transcript? (Curriculum)	Transcript	This field indicates whether the learning object (LO) has been moved to the user's archived transcript. The report displays "Yes" if the LO has been archived and displays "No" if the LO is not archived.	Yes/No	Curriculum Transcript Report



## Reporting - Certification Fields

With the March 6 2020 patch, additional certification fields are available. These new fields are available in Reporting 2.0. These fields are NOT available in Custom Reporting.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Certification Report - Create	Grants ability to create and edit Custom Certification reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Direct Subordinates.	Reports - Analytics
Custom Certification Report - View	Grants ability to view results of Custom Certification reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, and User's Direct Subordinates.	Reports - Analytics

See the table below for a list of the new available fields and related information:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Assigned Date	Certification	The date the certification was assigned to the user.	Date	Certification Report
Status Change Date	Certification	The date and time of the most recent change to the user's certification status. <b>Note:</b> <i>This field does not apply to Past Due and On Hold flags, as flags are separate from certification statuses.</i>	Date	Certification Report
Certification ID	Certification	This field is a unique identifier per version of a certification.	Text	Certification Report

## Completed SCOs

The **Completed SCOs %** field has been renamed to **Course Progress %**. The data captured by this field is not impacted.

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Course Progress %	Transcript	This field only applies to Online Class and Quick Course learning object types. The field displays the user's progress towards completion of the course.	Numeric	Test Report, Transaction Report, and Transcript Report

## Considerations

Organizations with automation or downstream processes may be impacted. If users have automated downstream processes that search for the name of the field, the process may fail or may not update properly. In this scenario, the downstream process would need to be updated to search for the **Course Progress %** field instead.

## Past Due Aging

Previously, users could leverage a **Past Due Aging** field as a report filter to isolate people who were more than X number of days past due on training. However, while this field was available in Reporting 2.0, the **Past Due Aging** field could not be used as a filter in Reporting 2.0 due to performance concerns.

With this enhancement, optimizations have been made to the **Past Due Aging** field and it has been reintroduced to Reporting 2.0. Users can once again add the **Past Due Aging** field as a filter in their reports.

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Past Due Aging	Transcript	This field displays the number of days a learning object is past due for completion by a user, if a due date was assigned. The value is calculated by subtracting the current date from the due date.	Numeric	Test Report, Transaction Report, and Transcript Report

## Set an End Date for Dynamic Assignments

## Set an End Date for Dynamic Assignments

Prior to this enhancement, when it was necessary to stop a dynamic learning assignment from processing, the administrator always needed to search for and manually deactivate the learning assignment.

With this enhancement, during the creation process, administrators can configure an end date for a dynamic learning assignment. After the dynamic learning assignment is submitted, it will process according to the specified frequency until the end date is reached. When the assignment reaches its end date, it stops processing automatically and will not process again.

[Click here to download the Learning Assignment Tool Starter Guide!](#)

### Implementation

This functionality is automatically available in all portals using the Learning module. Administrators with permission to create dynamic learning assignments have access to Processing End Date options via the Learning Assignment Tool.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Standard and Dynamic - Recurrence	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. Also grants ability to enable/disable Recurrence when creating a Dynamic Learning Assignment. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Assignment Tool - Standard and Dynamic	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates,	Learning - Administration

and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## Create Assignment - Processing End Date

A processing end date can be configured for a dynamic learning assignment during the Scheduling step of the assignment creation process.

To create 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. Progress through the creation process to the Scheduling step. **Note:** *Processing End Date options are only available for dynamic assignments. The assignment type is selected on the Setup step of the process.*

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Standard and Dynamic - Recurrence	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. Also grants ability to enable/disable Recurrence when creating a Dynamic Learning Assignment. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Assignment Tool - Standard and Dynamic	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration

Learning Assignment Tool > Create Assignment

## Create Assignment

Show Me

- ✓ Setup
- ✓ Options
- Schedule**
- Users
- Confirm

### Processing Frequency

How frequently would you like the Assignment to process and assign training to users that newly meet the User Criteria?

☒ Daily

☐ Annually

### Processing Start Date

When would you like the assignment to start processing and assign the training to users?

☒ As soon as Assignment is submitted

☐ As soon as Assignment is submitted, but assign the training relative to

☐ Specific Date

### Processing End Date

When would you like the assignment to stop processing and deactivate?

☐ No end date

☒ Specific Date

8/22/2020

### Training Due Date

When would you like the training to be due?

☐ No due date

☒ Relative date

91 Day(s) from Date Assigned

☐ Annual date

Cancel Save Draft Previous Next

## Configure Processing End Date

In the Processing End Date section, any administrator with permission to create dynamic assignments can select options for the dynamic assignment's end date. The following options are available:

- **No End Date** - Select this option if the dynamic assignment should not end automatically. The assignment will continue processing until it is manually deactivated by an administrator.
- **Specific Date** - Select this option to select a specific date on which the dynamic assignment will end. The date is selected from a calendar pop-up. On the specified date, the assignment will no longer process and no users will be added to the assignment criteria or assigned training in the future. **Note:** *The processing end date cannot be modified after the assignment has been submitted.*



If needed, an administrator can manually reactivate the dynamic assignment from the Assignment Summary page. If the assignment is reactivated, the end date is cleared and the dynamic assignment will continue processing until manually deactivated again. [See Assignment Summary Page.](#)

When will the last processing occur?

If a processing end date has been set for a dynamic assignment, the date and time of the final processing are impacted by the processing start date configured for the assignment:

- If a specific date and time were chosen for the **Processing Start Date** field - The last processing will be the day prior to the defined end date, near the designated time. For example, Arun submits a new dynamic assignment with **Processing Frequency** configured as **Daily**, a **Processing Start Date** of 4/21/2020 at 2:00PM, and a **Processing End Date** of 4/30/2020. The assignment will process every day close to 2:00PM. The last processing will be close to 2:00PM on 4/29/2020.
- If the **As soon as Assignment Is Submitted** option was chosen for the **Processing Start Date** field - The last processing will be the day prior to the defined end date, relative to the time of submission. For example, Carin submits a new dynamic assignment at 6:00AM with **Processing Frequency** configured as **Daily**, a **Processing Start Date** of **As soon as Assignment Is Submitted**, and a **Processing End Date** of 5/15/2020. The assignment will process every day around 6:00AM. The last processing will be around 6:00AM on 5/14/2020.

## "Subscriptions" Field Added to the Course Catalog and Course Console

## Subscriptions Field - Course Catalog and Course Console

The **Subscriptions** field is visible to learning administrators on both the Course Catalog page and Course Console page.

To access the Course Catalog, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG](#). Search for a learning object (LO) and click the Options drop-down for the item. Then click the **Edit** option to be navigated to the Course Catalog - General page for that LO.

To access the Course Console, go to [ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG](#) and then search for a specific LO using the **Search the Catalog** field. After you have found the LO for which you want to view the Course Console, click on the LO's title. This navigates you to the Course Console page for that LO.

### Permissions

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

Console (in conjunction with the Learning Admin Console - View permission). This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission.

Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.

## Course Catalog Subscription Field

The Subscriptions field displays on the General page of the Course Catalog for the selected training item. If more than one subscription is associated with the training item, the different subscriptions are separated by commas.

**Edit Modernizing Data Lakes and Data Warehouses with GCP**

Select any of the tabs below to edit course information. Moving to a different tab will automatically save the information on the previous page.

This is external content that may be updated via automatic synchronization. Manual changes made on this screen may be overwritten.

General	Prerequisites	Subjects	Skills	Competencies	Acknowledgement Approval Workfl	Availability	Emails	Recommendatio	Pricing	Training Units	Transactions	Evalu
---------	---------------	----------	--------	--------------	---------------------------------	--------------	--------	---------------	---------	----------------	--------------	-------

**Edit Training**

**Title:** Modernizing Data Lakes and Data Warehouses with GCP

**Provider:** Coursera for Business

**Type:** Online Content

**Version:** 1.0

**Learning Object ID:** 19110045-fc9d-5187-acb4-318cb67605d1

**Keywords:**

**Description:** The two key components of any data pipeline are data lakes and warehouses. This course highlights use-cases for each type of storage and dives into the available data lake and warehouse solutions on Google Cloud Platform in technical detail. Also, this course describes the role of a data engineer, the benefits of a successful data pipeline to business operations, and examines why data engineering should be done in a cloud environment. Learners will get <https://d3njcbbbjbot.cloudfront.net/api/utilities/v1/imageproxy/https://coursera-course-photos.s3.amazonaws.com/d7/ae085568e94de29ca34917dfbae02a/BO-and-ML-Fundamentals-v3.jpg?auto=format%2Ccompress&dpri=1&w=660&h=336&fit=fill&bg=FFF>

**Thumbnail Image:**

**Subscriptions:** Content Anytime Digital Fluency, Coursera

**Resources:** Add Attachment

No attachments have been uploaded for this Online Content

**Available Languages:** English (US)

**Default Language:** English (US) : This is the language shown to the user if the course is not localized in their language.

**Points:** 0

**Badge:** Add Badge

**Credits:** 0

## Course Console Subscription Field

The Subscriptions field displays in the Details section of the Course Console page for the selected training item. If more than one subscription is associated with the training item, the different subscriptions are separated by commas.

Catalog
Course Console

1 This is external content that may be updated via automatic synchronization. Manual changes made on this screen may be overwritten.

## "Dracula" by Stoker: BerkeleyX Book Club

**Provider**  
edX

**Training Hours**  
6 hours

**Mobile**  
Off

**Subjects**  
Industry Specific, Personal Development

**Available Languages**  
English (US)

**Keywords**  
N/A

**Description** [Edit](#)  

This course will explore Bram Stoker's 1897 classic vampire novel, *Dracula*, which is famous for introducing the vampire Count Dracula. This is the story of Dracula's move from Transylvania to England to find new blood and spread the curse of the undead. It also introduces the now-famous character of Professor Abraham Van Helsing.

The novel *Dracula* is categorized in many different ways: vampire, horror, and gothic fiction. It also addresses concepts such as women in Victorian culture, colonialism, sexuality, and post-colonialism. Although Stoker was not the first writer to tell the story of a vampire, he is credited for giving the vampire its modern form. This story has been adapted to many different forms in film and theater.


Participants in this course will read, discuss, and write about the text and its influence. As in most book clubs, the focus will be on lively discussion. Course materials will include background information for understanding the text, as well as vocabulary and language support. Assessment will include quizzes and short writing assignments.

**Exclude from Recommendations**  
Off

**Price**  
\$0.00

**Credits**  
0

**Subscriptions**  
Content Anytime Professional Skills



**Online Content**  
☒ Active  
☐ N/A  
0 (0 Reviews)

## "Subscriptions" Field Added to the Course Catalog and Course Console

Cornerstone's Content Delivery connectors enable a seamless integration between content providers and Cornerstone's learning management system (LMS). Using Content Delivery connectors, courses are automatically streamlined to the Course Catalog.

In February 2020, Cornerstone upgraded Content Anytime to utilize Content Delivery connectors with automated synchronization technology. In addition, both the Coursera for Business and edX for Business integrations use Content Delivery connectors.

In the Course Catalog and Course Console, each content integration is represented by a subscription, which is a collection of courses bundled for a specific provider or mutual content purpose. Content Anytime consists of several subscriptions, such as Content Anytime Essentials, Content Anytime Digital Transformation, and more.

With the May 2020 release, the following enhancements have been made:

- A new **Subscriptions** field displays for training in the Course Catalog and in Course Console for learning administrators
- When a user launches an AICC, SCORM, or Online Content course, the content source is visible in the launch URL.

### Use Case: Learning Administrator Views the Subscriptions Field

Julie, a learning administrator at ACME Co, wants to view which subscriptions that are linked to a certain online course. This information is helpful to her because online courses may be included in different integrations, and therefore associated with more than one subscription. In the ACME portal, some courses are included in a Content Anytime subscription sold by Cornerstone, and the same courses are also delivered by a direct integration, using a content provider.

Julie navigates to the Course Catalog page for an online course and views the Subscriptions field available on the Course Catalog - General page. This allows her to see the source of the course and better manage her organization's courses, subscriptions, and providers.

### Implementation

This functionality is automatically available in all Learning portals using a content subscription.

### Permissions

The following existing permissions apply to this functionality:

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

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

## Training Launch Enhancements



## Training Launch Enhancements - Overview

Prior to this enhancement, when a learner viewed training from any browsing page and the training did not require approval, the **Request** option would be the primary action available for the training. This required the learner to first request and then register for the training before being able to launch it. When a learner accessed training that did require approval, the user was required to request the training, wait for approval, then register for the training before being able to launch it.

With this enhancement, when a learner views training from any browsing page and the training does not require approval, the **Launch** option will display as the primary action available for the training. If approval is required for a training item, the user will see the **Request** option, but then after the training is approved, the **Launch** option will be the next available action. Removing the **Register** option from the training access workflow helps users obtain training faster and more efficiently. In addition, when a learner launches training from any page, the page from which they accessed the training does NOT redirect to the learning transcript. The page from which the user accessed the training remains open, allowing them to continue browsing training without interruption.

### Considerations

This updated training launch behavior applies to training on all of the following system pages:

- Learner Home
- Learner Search
- Playlist
- Learning Details page (applies to both new and legacy)
- Welcome Page
- Transcript

If no approvals are required and no cost is associated with training accessed from any of the above pages, the primary action available for the training item is **Launch**.

The updated launch redirect behavior applies to unassigned materials, online courses, and quick courses accessed from the following system areas:

- Learner Home
- Learning Search
- Playlists
- Learning Details (both the legacy version and the redesigned version)

For tests that are launched from any of the following locations but not completed, the learner will be directed back to the Launch page when they exit and save:

#### Welcome Page

- Transcript
- Transcript Details
- Learning Details (both the legacy version and the redesigned version)

- Learner Home
- Learning Search
- Playlists

## Implementation

This functionality is automatically enabled in all portals using the Learning product.

## Training Launch Behaviors

The new training launch workflow may be impacted by other training configurations. See below for information about different training launch scenarios:

### Launch Training with No Approval Required

When a learner views training from any browsing page and the training does not require approval, the **Launch** option will display as the primary action available for the training. The user can click the **Launch** option to immediately launch the training.

The screenshot displays a training card for 'Introduction to Workplace Ethics'. The card includes the following details:

- Header:** ONLINE CLASS, Introduction to Workplace Ethics
- Metadata:** Last Updated 02/11/2020, Duration 1 hour, 5 stars, 1 review
- Details:** Ethics don't just apply to senior executives. While upper management does have a responsibility to set the ethical tone for an organization, employees at every level also have a responsibility to conduct themselves in an ethical manner. This course will prepare you to approach your job with an awareness of the importance of ethics in the work setting and an understanding of what constitutes ethical behavior. You will learn the thinking behind ethical behavior and be able to recognize some of the common myths about business ethics. [Show More](#)
- Ratings and Reviews:** 5.0 (5 stars, 1 review)
- Price:** \$0.00
- Actions:** A blue 'Launch' button with a dropdown arrow is highlighted with a red box. Below it is a grey 'Assign' button, separated by the word 'or'.

Rating	Percentage
★★★★★	100%
★★★★☆	0%
★★★☆☆	0%
★★☆☆☆	0%
★☆☆☆☆	0%

### Launch Training with Approvals Required

If approval is required for a training item, the user will see the **Request** option for the training. The user must then wait for approval to be given. When approval is granted, the **Launch** option will become available to the user. The user can then launch the training without registering first.

### Launch Training with Price

If a training item has a monetary price or training unit price, the primary action that displays for the training is **Add to Cart**. After the training has been purchased, the user can launch the training without registering first.

## Launch Training with Uncompleted Prerequisites

If a training item has a prerequisite and the user has not yet completed that prerequisite, the primary action that displays for the training is **View Prerequisites**. After the user has completed the prerequisite, the user can launch the training without registering first.

## Launch Training with Training Purpose

If a training item has a training purpose workflow associated with it, the user will see the **Request** option for the training.

## "Waitlist Expired" and "Exempt" Statuses Will Not Increase Event Reg Num

Prior to this enhancement, if a user was in a Waitlist Expired or Exempt status for a session, the system automatically reassigned the event when the user completed the next session of that event. Even though the user had completed the session, the reassigned event would display the highest registration number and created the impression that the user had still not completed the event. If an administrator created reports containing the greatest or latest reg number, this behavior impacted their ability to report on user completion, potentially causing compliance issues.

With this enhancement, if a user is in a Waitlist Expired or an Exempt status for a session, the registration number of the event will NOT increase, provided there is no further user action required for the event, and the user will not be prompted to retake another session of the same event.

## Performance

## Compensation

## Currencies Redesign



## Compensation - Currencies Redesign

With the requirement to pay employees in multiple currency types, and organizations moving into different international marketplaces, the demand to pay employees in different currencies is now a business requirement.

With this enhancement, the new Currency Types page provides administrators with a single point-of-access to manage currency types for your organization.

To access the Currency Types page, go to [ADMIN > TOOLS > COMPENSATION MANAGEMENT > CURRENCIES](#).

Old UI:

Compensation Currencies										
Currencies										
Determine the conversion rates and decimal precision for Compensation Planning. Conversion Rates will apply whenever multi-currency is being used in Compensation. Precision settings will determine the number of decimal places.										
Default Currency: United States Dollar (USD) \$										
Currency	Code	Symbol	Rate	Default Precision	Daily Precision	Far and away Prec...	Hourly Precision	Monthly Precision	Weekly Precision	Last Updated
Argentina Peso	ARS	PS		2	2	2	2	2	2	
Australian Dollar	AUD	A\$	0.9825	2	2	2	2	2	2	7/26/2012 12:28:23 PM
Brazil Real	BRL	R\$		2	2	2	2	2	2	
Canadian Dollar	CAD	C\$	0.9652	2	2	2	2	2	2	4/5/2011 10:47:13 AM
China Yuan	CNY	Y		2	2	2	2	2	2	
Cyprus Pound	CYP	CC		2	2	2	2	2	2	
Czech Republic Koruna	CZK	Kc		2	2	2	2	2	2	
Euro	EUR	€	0.704	2	2	2	2	2	2	4/5/2011 10:49:04 AM
Hong Kong Dollar	HKD	HK\$		2	2	2	2	2	2	
India Rupee	INR	Rs	44.3	2	2	2	2	2	2	4/5/2011 10:49:31 AM
Indonesia Rupiah	IDR	Rp		2	2	2	2	2	2	
Japan Yen	JPY	¥		0	0	0	0	0	0	
Malaysia Ringgit	MYR	RM		2	2	2	2	2	2	
Mexico Peso	MXN	MS	11.8227	2	2	2	2	2	2	4/5/2011 10:49:58 AM
Mozambican New Metical	MZN	MTn		2	2	2	2	2	2	

New UI:

Currency Types						
Manage Currencies for your organization. You can modify your Corporate Currency, Activate and Deactivate currencies, Update Conversion Rates and Precision for currencies.						
<input type="checkbox"/> Hide inactive Currencies						
Status	Currency Type	ISO Code	Symbol	Conversion Rate	Last Updated	
<input checked="" type="checkbox"/>	United Kingdom Pound <small>Corporate Currency</small>	GBP	£	1 GBP = 1 GBP	4/10/2020 at 10:06 PM	<a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Albanian lek	ALL	Lek	1 GBP = 0.0000012042903 ALL	4/13/2020 at 2:22 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Algerian Dinar	DZD	د.ج	No Conversion Rate	4/13/2020 at 2:22 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Angolan Kwanza	AOA	Kz	1 GBP = 1 AOA	4/13/2020 at 2:24 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Argentina Peso	ARS	PS	No Conversion Rate	4/13/2020 at 2:22 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>

## Administrator Tasks

Based on permissions, administrators can perform the following tasks:

- Enable/disable currency types
- View Currency Type details and Conversion Rate History
- Update conversion rates
- Set a Corporate Currency
- Change the Decimal Precision for Currencies on each Wage Type

See **Compensation - Currency Types Administration** on page 328 *for additional information*.

## Implementation

- This functionality is enabled by default for all Compensation/Cornerstone HR clients.
- A one-time migration migrates all previously existing, active Currency Types as Custom Currency Types. Inactive Currency Types are not migrated.
- A set of new standard currency types are added to all portals in an inactive status. This prevents duplicate active currency types in portals where a previously existing currency type may have the same name as a newly added currency type. Organizations can enable these currency types as needed.
- Organizations that do not wish to utilize the newly added currency types do not have to activate the new wage types and should not be impacted by this enhancement.
- Once migration is complete, users with the current Compensation Wage Types permissions are automatically assigned the Compensation Wage Types 2.0 permissions. The old Compensation Wage Types permissions will be disabled.

## Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Currencies 2.0 - View	Grants the ability to view all currency pages, fly outs, and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - Edit	Grants the ability to customize the Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all currency pages, fly outs , and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - Manage	Grants the ability to activate/deactivate currencies, change the Corporate Currency, customize Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all Currency pages, fly outs , and Rate History.	Compensation - Administration

## Compensation - Currency Types Administration

The Currency Types page provides administrators with an easy, single point-of-access to manage currency types for your organization.

You can perform the following tasks on the Currency Types page:

- **Enable/disable currency types**
- View/edit currency types, decimal precisions, and the Corporate Currency [See Compensation - View/Edit Currency Types](#) on page 331 *for additional information*.
- Manage currency conversion rates [See Compensation - Update Conversion Rates](#) on page 333 *for additional information*.
- View Rate History

See [Standard Currency Codes](#) for a full list of standard currencies.

To access the Currency Types page, go to [ADMIN > TOOLS > COMPENSATION MANAGEMENT > CURRENCIES](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Currencies 2.0 - Edit	Grants the ability to customize the Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all currency pages, fly outs , and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - Manage	Grants the ability to activate/deactivate currencies, change the Corporate Currency, customize Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all Currency pages, fly outs , and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - View	Grants the ability to view all currency pages, fly outs, and Rate History.	Compensation - Administration

Currency Types						
Manage Currencies for your organization. You can modify your Corporate Currency, Activate and Deactivate currencies, Update Conversion Rates and Precision for currencies.						
<input type="checkbox"/> Hide inactive Currencies						
Status	Currency Type	ISO Code	Symbol	Conversion Rate	Last Updated	
<input checked="" type="checkbox"/>	United Kingdom Pound <small>Corporate Currency</small>	GBP	£	1 GBP = 1 GBP	4/10/2020 at 10:06 PM	<a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Albanian lek	ALL	Lek	1 GBP = 0.0000012042903 ALL	4/13/2020 at 2:22 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Algerian Dinar	DZD	د.ج	No Conversion Rate	4/13/2020 at 2:22 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Angolan Kwanza	AOA	Kz	1 GBP = 1 AOA	4/13/2020 at 2:24 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>
<input checked="" type="checkbox"/>	Argentina Peso	ARS	PS	No Conversion Rate	4/13/2020 at 2:22 PM	<a href="#">Rates</a> <a href="#">Rate History</a> <a href="#">Edit</a>

## Currency Types

The Currency Types table displays the following information for each currency type:

- **Corporate Currency** - Displays the Currency the Organization uses as the base line for all conversion rates and payments. This be the home currency for the organization or the main static currency.
- **Hide inactive currencies** - Check to display active currencies only.
- **Status** - The current status of the currency type. Options are Enabled or Disabled. To enable or disable a currency type, click its toggle.
- **Currency Type** - The name of the currency type.
- **ISO Code** - The three-letter International Organization for Standardization (ISO) code that represent the specified currency.
- **Symbol** - The graphic symbol used to represent a specific currency. For the organization's corporate currency, this displays as N/A because this value cannot be modified.
- **Rate** - Displays the currency's conversion rate with respect to the organization's Corporate Currency.
- **Last Updated** - Displays the date and time at which the currency was last updated. This is updated automatically.

## Edit/View

- Click **View** to view details for the selected currency type.
- Click **Edit** to change currency details, decimal precisions, and change the Corporate Currency to the selected currency.

See **Compensation - View/Edit Currency Types** on page 331 *for additional information*.

## Rates

Click **Rates** for a currency to update the conversion rate between the selected currency and the Corporate Currency to match currency market changes.

See **Compensation - Update Conversion Rates** on page 333 *for additional information*.

## Rate History

Click **Rate History** to display the details of all changes made to the selected conversion rate.

Conversion Rate History			
(USD) United States Dollar			
Effective Date	Conversion Rate	Created On	Created By
4/10/2020 at 10:06 PM	1 GBP = 0.0002189621199 USD	4/10/2020 at 10:06 PM	Julie Hennessy
4/10/2020 at 10:03 PM	1 BMD = 0.0002189621199 USD	4/10/2020 at 10:03 PM	Julie Hennessy
4/10/2020 at 9:59 PM	1 GBP = 0.0002189621199 USD	4/10/2020 at 9:59 PM	Julie Hennessy
4/10/2020 at 9:58 PM	1 DZD = 0.0002189621199 USD	4/10/2020 at 9:58 PM	Julie Hennessy
4/10/2020 at 9:58 PM	1 GBP = 0.0002189621199 USD	4/10/2020 at 9:58 PM	Julie Hennessy
4/10/2020 at 5:08 PM	1 AFN = 0.0000038414407 USD	4/10/2020 at 5:08 PM	Julie Hennessy
4/10/2020 at 4:58 PM	1 AFN = 0.0000038414407 USD	4/10/2020 at 4:58 PM	Julie Hennessy
4/10/2020 at 4:38 PM	1 AFN = 0.0000038414407 USD	4/10/2020 at 4:38 PM	Julie Hennessy
4/10/2020 at 4:34 PM	1 DZD = 0.0000038414407 USD	4/10/2020 at 4:34 PM	Julie Hennessy

## Compensation - View/Edit Currency Types

Administrators can use the Currency Types page to view or edit the currency details, including the decimal precision and the default Corporate Currency.

To access the Currency Types page, go to [ADMIN > TOOLS > COMPENSATION MANAGEMENT > CURRENCIES](#).

See [Standard Currency Codes](#) for a full list of standard currencies.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Currencies 2.0 - Edit	Grants the ability to customize the Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all currency pages, fly outs , and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - View	Grants the ability to view all currency pages, fly outs, and Rate History.	Compensation - Administration

The screenshot shows the 'Edit Currency Types' dialog box for the 'Australian Dollar'. The dialog has a close button (X) in the top right corner. The 'Name' field is 'Australian Dollar'. The 'Symbol' field is 'A\$' and the 'ISO Code' field is 'AUD'. The 'Status' field is 'Enabled'. Below these fields is a section titled 'Decimal Precision' with a sub-header 'Wage Type' and 'Decimal Precision'. The table below shows the decimal precision for different wage types.

Wage Type	Decimal Precision
Default Wage Type Precision	1
Annual: en-US (WT-1)	2
April 7th 2020 WT (WT-110)	1

At the bottom of the dialog are 'Cancel' and 'Update' buttons.

### View Currency Types

Click **View** to open the flyout that displays the conversion rate, decimal precisions for a specific currency, and the Corporate Currency.

## Edit Currency Types

Click **EDIT** for the appropriate currency type. The Edit Currency Type flyout opens and contains the following sections:

- **Name** - The name of the selected currency type. This field is not editable on the flyout.
- **Symbol** - Displays the graphic symbol used to represent a specific currency. For the organization's default currency, this displays as N/A because this value cannot be modified. This field is not editable on the flyout.
- **ISO Code** - Displays the three-letter International Organization for Standardization (ISO) code that represent the specified currency.
- **Status** - The current status of the currency code. Options are Enabled or Disabled. This field is not editable on the flyout.
- **Decimal Precisions** - By default, this section displays the default precision for active currency types. Decimal Precision allows Admins to customize the number of decimal places used for each Wage Type, allowing organizations to be more precise. For example, hourly wage types may have more decimal places than an annual wage type. During implementation, a Default Decimal Precision is created and used until a custom Decimal Precision is updated on a Wage Type. Selections made on Wage Types in the Edit flyout take precedence over the default setting. The maximum precision value is 4.
- **Corporate Currency** - Check **Set as Corporate Currency** to set the selected currency as the default for your organization. When the corporate currency is changed, all portal currencies are updated to the new default portal currency and the **Last Updated** information is set to the date and time of the portal currency change. Additionally, when a Corporate Currency is changed, and the new conversion rates between foreign and new Corporate Currencies has more than 15 digits, the rate is rounded per the Real Round Rules (0-4 no rounding, 5-9 round up).

## Update

Click **UPDATE** to close the flyout, save the changes, and return to the Currency Types page.



## Compensation - Update Conversion Rates

Administrators can make changes to conversion rates as necessary. This allows an organization to stay up-to-date with conversion rates that match market changes.

To access the Currency Types page, go to [ADMIN > TOOLS > COMPENSATION MANAGEMENT > CURRENCIES](#).

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Currencies 2.0 - Edit	Grants the ability to customize the Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all currency pages, fly outs , and Rate History.	Compensation - Administration
Compensation Currencies 2.0 - Manage	Grants the ability to activate/deactivate currencies, change the Corporate Currency, customize Decimal Precisions for each Wage Type on each currency, update conversion rates between the currencies and the Corporate Currency, view all Currency pages, fly outs , and Rate History.	Compensation - Administration

The screenshot shows the 'Update Currency Rate' dialog box. On the left, a list of currencies is visible with checkboxes. The dialog box is open for the 'Euro' and contains the following fields:

- Name:** Euro
- Symbol:** €
- ISO Code:** EUR
- Status:** Enabled
- Conversion Rate:**
  - The following Current Rate is being used for currency conversions. Saving a new rate will update the Currency Conversion rate.
  - Corporate Currency (GBP): 1
  - Current Rate (EUR): 27032360195.42414
  - Corporate Currency (GBP): 1
  - New Rate (EUR):

Buttons for 'Cancel' and 'Update' are at the bottom right.

### Update the Conversion Rate

1. Click **Rate** for the appropriate currency type.
2. In the Conversion Rate section, in the **New Rate** field, enter the new conversion rate .  
The conversion rate can have 15 numerical digits total spread across the left and right

side of the decimal point. Once a compensation task begins, the conversion rates are locked for the life of the task.

3. Click **UPDATE** to save the changes.

Conversion Rates with the latest effective date are used for all conversions, which includes all other currencies and the Corporate Currency.

### Standard Currencies

The table below displays a full list of standard currencies that can be used when managing compensation currencies.

Cornerstone May 2020 Release Notes: Release Notes for May 2020

## Reporting Fields - Performance Reviews

As released with the 6 March 2020 patch release, Performance Review exception reports are available and include the following fields:

- Competency Name
- Completion Date
- Expiration Date
- Goal Assignment
- Goal Rating Score
- Goal Rating Title
- Goal Target Date
- Goal Title
- Performance Review Due Date
- Reopened
- Review Period Start Date
- Section Name
- Sign-off Declined
- Step Reviewer ID
- Step Reviewer Name
- Step Status
- Step Title
- Task Final Rating
- Task Final Rating Text
- Task Name
- Task Raw Rating
- Task Raw Rating Text
- Task Status
- Task User Title

To use exception filters for these reports, add the Exception Filters section to the Builder tab for the report. The exception filters are only available for the fields that apply to these report types. For more information about creating exception reports in Reporting 2.0, [see \*Exception Reporting\*](#).

The permissions needed to view the exception report filters are the same permissions needed to see the non-exception version of the reports. [See \*Permissions Reporting 2.0\*](#).

## Succession

## Matrixed Co-Planners in Succession Tasks

Prior to this enhancement, co-planners had access to all assessees in the task, which did not work for matrix structures that needed to include dotted-line managers for specific employees in the task.

With this enhancement, the administrator or the assessor can delegate a co-planner to specific assessees within Employee Relationship and Assessor tasks, which provides flexibility and control when involving co-planners.

To access the Co-Planners tab, go to [ADMIN > TOOLS > SUCCESSION MANAGEMENT > TASKS](#). Then, select an existing task. Administrators can also access this tab when creating a new Succession Task.

### Admin UI

### Define Succession Task

General
Availability
**Co-Planners**
Task Review
Confirm

**Co-Planners**

At any point after the task is launched, an administrator using the Task Details of the SMP Task Administration will be able to add or remove individual co-planners and assign specific assessees to each co-planner.

In the section below, you can enable assessors within the task to add or remove co-planners and assign specific assessees to each co-planner. These options cannot be changed after the task is launched.

☒ Allow assessors to add or remove co-planners within their tasks
☒ Allow assessors to assign specific assessees to each co-planner

In the section below, you can also add default co-planners for the task by using the availability of each default co-planner. Default co-planners will automatically be assigned as co-planners for assessors within the defined availability.

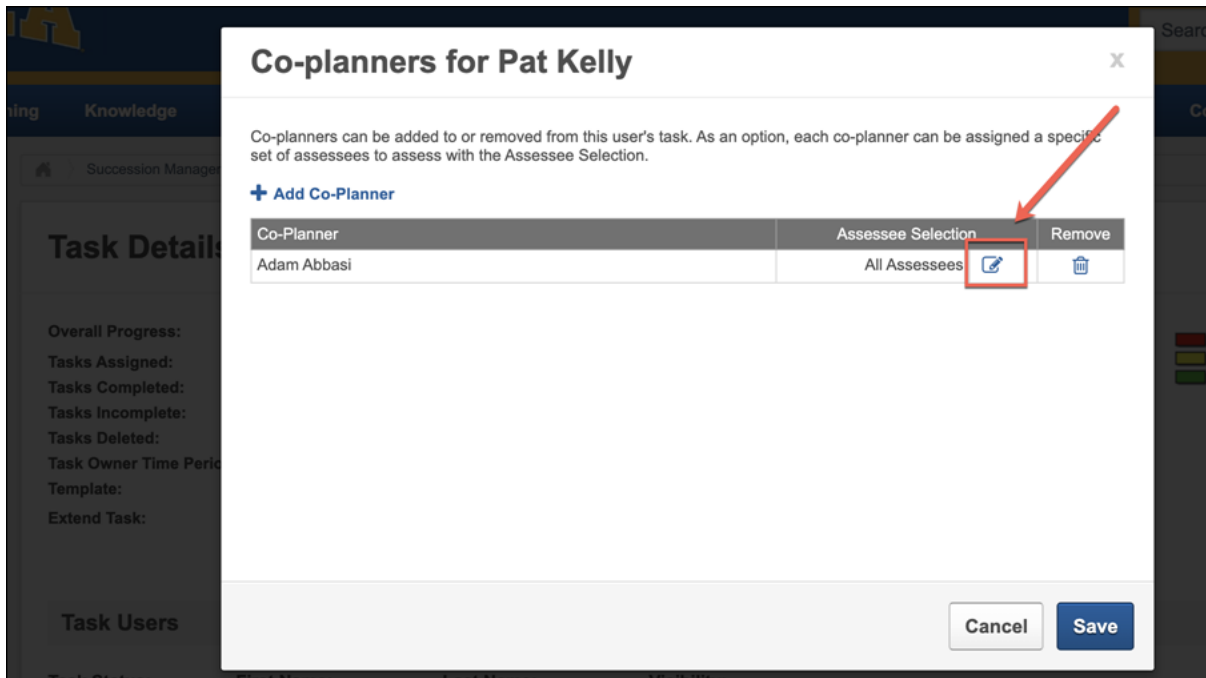
Note: Co-planner functionality does not extend to task reviews.

Default Co-Planners +

Name	Availability	Options

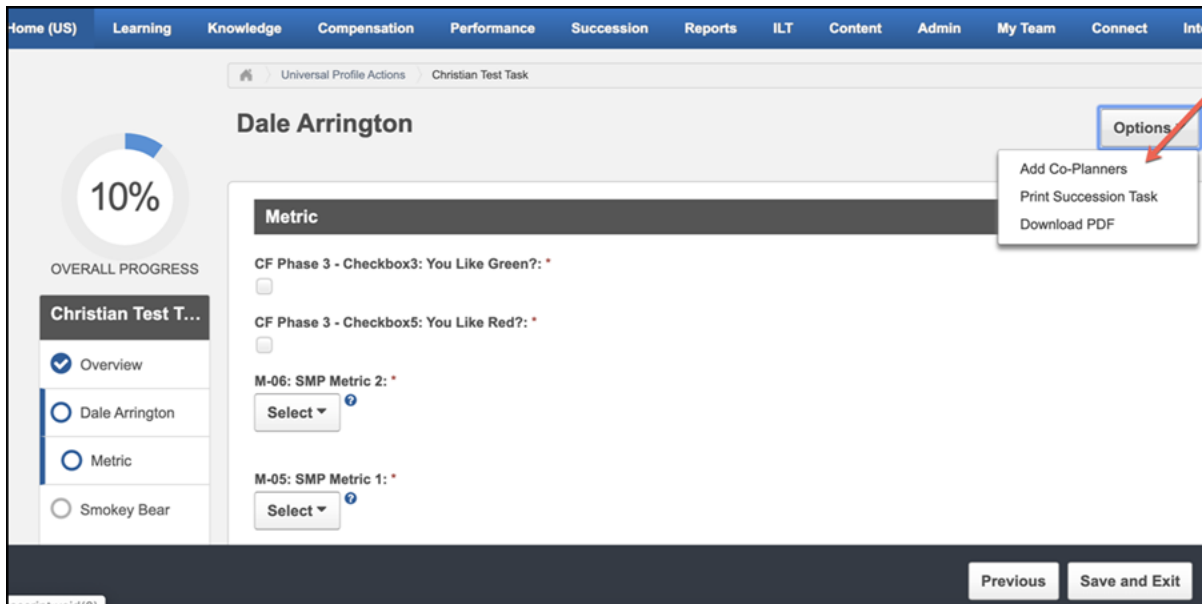
Back
Cancel
Next

Administrators can also assign assessees to specific co-planners after a task is launched in Task Details.



## Manager UI

Managers can access this feature in their Succession Task.



## How Does This Enhancement Benefit My Organization?

Assigning specific assesseees to each co-planner allows “dotted-line” managers to participate in Succession tasks and provide valuable input.

## Use Case

Maria is a manager assigned an employee relation succession task for her five direct reports, two of which live in New Zealand (NZ) and work closely with the head of that office, the VP-NZ.

Maria would like to get the input of VP-NZ on those two employees, so she invites him as co-planner, but does not assign him to the other three direct reports that he does not work with.

## Implementation

This functionality is automatically enabled for Employee Relationship and Assessor Succession task types.

## Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP Task Administration	Grants access to create Succession Management Plan (SMP) tasks for assessing talent incumbents and successors, and manage activity within those tasks. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Talent/Succession - Administration



# Recruiting

## Candidate Messaging & SMS (Pilot)

Prior to this feature, the only way a recruiter could send trackable communications was via in-product email. Only certain email types could be tracked, and tracking was unreliable as it required candidates to reply-all in order for tracking to be preserved.

The new Candidate Messaging feature allows recruiters to converse with candidates directly inside Cornerstone Recruiting through an instant messaging-style interface. Candidates will be notified of unread messages via email and SMS (where available and possible) and can respond directly to recruiters using a link in the notification.

Candidate Messaging is available from both the Manage Candidates and Applicant Profile pages.

See the following for detailed information about this feature:

- Send Messages - [See Send Candidate Messages \(Pilot\)](#).
- Message Inbox for Recruiters - [See Candidate Messaging Inbox for Recruiters \(Pilot\)](#).
- Candidate Experience with Messages - [See Candidate Experience \(Pilot\)](#).

## Implementation

For the May '20 release, this feature is only available to pilot program participants.

## Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Candidate Messages: View and Send Messages	Grants access to Candidate Messaging & SMS functionality. This permission cannot be constrained. This permission is added to Requisition: Owner and Applicant Reviewer roles by default and can be added to other security roles by the administrator.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via	Recruiting

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.*

## Deprecation of Manage Applicants with the February '21 Release

With the May '20 release, in Stage environments, when the Applicants count is selected from all applicable pages, which includes Manage Requisitions, Hiring Dashboard, and Review Applicants, users will be redirected to a filtered view of the **Manage Candidates** page specific to the relevant requisition instead of Manage Applicants.

With the February '21 release:

- The Manage Applicants page will be deprecated and will be removed in all environments.
- The redirects to Manage Candidates instead of Manage Applicants will be automatically enabled in Production and Pilot environments.
- Defects related to Manage Applicants will no longer be supported.

Manage Candidates is a one-stop-shop for recruiters to effectively and efficiently manage candidates throughout the hiring process. Manage Candidates provides a modern UI (user interface) and additional actions and details available to recruiters that Manage Applicants doesn't. This change provides a better user experience by centralizing all the essential actions recruiters need to take from one page, rather than navigating to multiple pages.

## Deprecation of Suggested Referrals and New Submissions Pages with the August '20 Release

With the May '20 release, along with the [auto-enablement of Manage Candidates](#) in Production and Pilot environments, when New Submissions or Suggested Referrals are selected from the Manage Requisition, Hiring Dashboard, Recruiting Dashboard, or Recruiting Manager Dashboard pages, users will be redirected to a filtered view of the Manage Candidates page instead of the New Submissions or Suggested Referrals pages. Support for defects related to the Suggested Referrals and New Submission pages will also stop at this time. This redirect is already available today in Stage portals.

With the August '20 release, the deprecation will be complete with the removal of the New Submissions and Suggested Referrals pages in all environments.

Manage Candidates is a one-stop-shop for recruiters to effectively and efficiently manage candidates throughout the hiring process. Manage Candidates provides a modern UI and the same functionality currently available on the New Submissions and Suggested Referrals pages. This change provides a better user experience by centralizing all the essential actions recruiters need to take from one page, rather than navigating to multiple pages.

### Implementation

As part of the May '20 release, support for defects related to the Suggested Referrals and New Submissions pages is no longer available.

With the August '20 release, the deprecation will be complete with the removal of the Suggested Referrals and New Submissions pages in all environments.

## Hiring Manager Experience - Request Candidate Feedback Enhancements

With the May '20 release, the following enhancements are made to the Request Candidate Feedback functionality:

### Welcome Page

A welcome page is added to the Request Candidate Feedback functionality. The welcome page provides more context to recipients and helps make it clearer why feedback is being requested.

The welcome page shows the following information:

- **GET STARTED** button for quick access to the feedback page for the first candidate in the list
- Date the feedback request was sent
- Recruiter's message to recipients
- Name of recruiter who requested the feedback

The welcome page is accessed by clicking **Show Message** in the upper-left corner of the feedback page.

Candidate Feedback Request #7687eb91251d45bd95b69a9b985b7190

A recruiter has shared the following candidates with you.

[Show Message](#)

**Senior Accountant**  
Chicago, IL

● Jersey Bowman

**Accounting Manager - New York**  
NY

Kate Summers

Your valuable feedback has been requested for the 4 listed candidate(s).

[Get Started](#)

4/10/2020,

Please review all candidate details prior to submitting feedback. Thank you!

**TS** Tasha Shore  
Administrator Position

### Recipient's Position OU in Search Results

Prior to this enhancement, when searching for users to include in the feedback request, only the user's name appeared in the search results. This presented issues for organizations with multiple users with the same name.

With this enhancement, the user's Position Organizational Unit (OU) now displays along with the user's name. This helps to ensure recruiters are sharing candidates with the correct business stakeholder.

This feature is not available at the start of user acceptance testing (UAT) for the May '20 release but will be available at a later date during UAT.

## Optimized Feedback User Interface

Prior to this enhancement, pending feedback was visible in the feedback section for recruiters, but information was not provided about which users had not yet submitted feedback. This presented issues in the recruiting process because recruiters were not able to check with users on their pending feedback. In addition, recruiters might not have been able to move forward with some candidates who had outstanding feedback.

With this enhancement, the feedback user interface (UI) is updated to include information about which users have not yet submitted feedback.

The optimized UI is not available at the start of user acceptance testing (UAT) for the May '20 release but will be available at a later date during UAT.

## Implementation

The following features are not available at the start of user acceptance testing (UAT) for the May '20 release but will be available at a later date during UAT:

- Optimized Feedback User Interface
- Recipient's Position OU in Search Results

Once implemented, these enhancements are available for all organizations using Recruiting.


[Click here to download the Manage Candidate starter guide.](#)

[Click here to access the Manage Candidates Adoption Kit.](#)

## Troubleshooting

### Error When Clicking Shareable Feedback Link

If users experience an error when trying to open the feedback page using the link in the feedback request email, it is possible that the error is occurring due to an issue with the deep links in your portal, so you will want to confirm that the deep links are configured properly. For example, after a Production copy down to Stage, the deep links for the Stage portal will point to the Production portal, since those were the copied down values.

To fix this, navigate to [Admin > Tools > Learning > Catalog Management > Deep Links](#). Then, click the Edit icon  for the deep link and [set the base URL as desired](#).

## Manage Candidates Auto-Enabled in Production

With the May '20 release, Manage Candidates will be auto-enabled in Production and Pilot environments. The option to enable via **Feature Activation Preferences** will also be removed as it will no longer be needed. Manage Candidates was previously auto-enabled in Stage environments with the February '20 Release.

For information about additional enhancements to Manage Candidates for the May '20 release, see the following in Online Help:

- Assign Forms - **See Simplified Recruiter Experience in Manage Candidates - Assign Forms and Invite to Events - Overview** on page 350 *for additional information.*
- Assign Integrations - **See Simplified Recruiter Experience in Manage Candidates - Assign Integrations** on page 356 *for additional information.*
- Deprecation of Suggested Referrals and New Submissions Pages -
- Invite to Event - **See Simplified Recruiter Experience in Manage Candidates - Assign Forms and Invite to Events - Overview** on page 350 *for additional information.*
- New Submissions Redirect to Manage Candidates - **See Simplified Recruiter Experience in Manage Candidates - Suggested Referrals and New Submissions** on page 366 *for additional information.*
- Request Reference Letters - **See Simplified Recruiter Experience in Manage Candidates - Request Reference Letters - Overview** on page 365 *for additional information.*
- Suggested Referrals Redirect to Manage Candidates - **See Simplified Recruiter Experience in Manage Candidates - Suggested Referrals and New Submissions** on page 366 *for additional information.*



## pymetrics Talent Management and Screening Integration

The pymetrics Talent Management and Screening integration helps organizations make well-informed hiring decisions—all within the convenience and seamlessness of the Cornerstone recruitment and talent management system you already use. The assessments use data science to predict a candidate's job fit and future performance, rather than only focusing on the skills a candidate has already attained based on their resume.

pymetrics assessments can be included in the application workflow and can also be sent manually by the recruiter outside of the job application.

### Implementation

This integration was released as part of the 6 March 2020 patch release. This integration is available via [Edge Marketplace](#) for all organizations using the Recruiting suite and that also have an account with the integration vendor.

Additional instructions for enabling and configuring the integration are available on the [Setup tab of the integration in Edge](#). There is no additional cost associated with enabling this integration in Edge.

### Permissions

The following existing permissions apply to this functionality:

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

## Simplified Recruiter Experience in Manage Candidates

## Simplified Recruiter Experience in Manage Candidates - Assign Forms and Invite to Event

## Simplified Recruiter Experience in Manage Candidates - Assign Forms and Invite to Events - Overview

The following features were released to Stage portals as part of the 6 March 2020 patch release and are now available in Production and Pilot portals as part of the May '20 release:

- **Assign Forms** - Forms can now be assigned to candidates on Manage Candidates in Production and Pilot environments.
- **Invite to Event** - Candidates can now be invited to interview events on Manage Candidates in Production and Pilot environments.

### Implementation

These features are available for all portals using Recruiting.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Manage Interviews	Grants ability to manage and schedule interviews for applicants. This permission cannot be constrained.	Recruiting
Recruiting Forms - Assign	Grants access to assign forms in Recruiting. This permission cannot be constrained.	Recruiting

## Manage Candidates - Assign Forms

The Assign Forms feature is available from the **More** drop-down on Manage Candidates. A form can be assigned to one candidate at a time or to multiple candidates at once.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Recruiting Forms - Assign	Grants access to assign forms in Recruiting. This permission cannot be constrained.	Recruiting

### Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Assign Applicant Form	<p>This email is triggered when a form is assigned to an applicant. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment t action type section of Email Management.</p> <p>Use Case: Use this trigger to send notifications that a form has been assigned to an applicant.</p>	Recruiting

To assign a form:

1. Navigate to [RECRUIT > MANAGE CANDIDATES](#).
2. Check the box to the left of the candidate name.
3. Select **Assign Form** from the **More** drop-down. This opens the Assign Forms flyout. Each candidate's name appears in the recipients list at the top of the flyout. **Note:** *You can also assign forms from the applicant carousel by clicking the **Assign Form** link on the carousel page.*
4. Select a form from the Available Forms section. The only forms that display are forms that are within your availability.
5. Click **Submit**. A confirmation message will appear indicating whether the invitation was sent successfully.

Submitting the form also triggers the Assign Applicant Form email notification, if enabled and active in [Email Administration](#). This email lets the candidate know they have been assigned the form.

Forms are available to candidates from their My Profile page. From there, they can launch and complete the form.

## Manage Candidates - Invite to Event

The Invite to Event feature lets you invite one or more candidates to interview events. This feature is available from the **More** drop-down on Manage Candidates.

**Pre-Step Note:** In order to have interview events available to select, there must be at least one interview event already created in [Interview Events & Sessions](#), and the event must be available to the recruiter who is creating the invite.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Manage Interviews	Grants ability to manage and schedule interviews for applicants. This permission cannot be constrained.	Recruiting

### Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Invitation to Interview Event (Applicant Self Schedule)	<p>This email is triggered when a recruiter sends a self schedule invitation to an applicant for an interview event. The email can be sent to Applicant, Hiring Manager, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Management.</p> <p>Use Case: Use this email to send a message to the applicant regarding self scheduling an interview event. With this link, the applicant can schedule themselves into an interview event.</p>	Recruiting

To invite candidates to interview events from either the Manage Candidates page or the applicant carousel:

1. Navigate to [RECRUIT > MANAGE CANDIDATES](#).
2. Check the box to the left of the candidate name or use the select all checkbox to select all visible candidates.
3. Select **Invite to Event** from the **More** drop-down on Manage Candidates or from the options menu on the applicant carousel. This opens the Invite to Event flyout.
4. Search for and select an event. The events that display are within your availability, as defined by the administrator when configuring the event. Selecting an event opens the Invite Details flyout.
5. Configure the following details of the invite:

- A. **Interview Format** - Select the format of the interview, either **In Person** or **Phone**. If **Phone** is selected, you will have the option to enter a phone number, but this is not required.
  - B. **Interview Duration** - Select the duration of the interview from the drop-down. The options that are available are the time intervals configured for the session part that was selected in the **Date** field. If only one duration has been configured for all session parts for the event, then that duration value displays by default and cannot be modified.
  - C. **Date(s)** - This field displays the dates available for the event. based on the interview duration that was selected. Select one or more specific dates from which the candidate can choose to schedule themselves for an interview. Or, select the **Select All** value to include all available interview slots from which the candidate can choose. As dates are selected, a count will update to indicate the number of dates selected and the number of available slots for the selected dates that will be shared with the invitees.
  - D. **Optional Message to Candidates** - Use this field if you would like to provide comments to the candidate in regards to the invite.
6. Click **SEND**. A confirmation message will appear indicating whether the invitation was sent successfully.

Saving the invite also triggers the Invitation to Interview Event email, if enabled and active in **Email Administration**. This email lets the candidate know they have been invited to the event and can schedule an interview.

The invite is available to candidates in the **Pending Tasks section of their profile**. From there, they can launch the invite and schedule an interview.

## Simplified Recruiter Experience in Manage Candidates - Assign Integrations

The ability to assign integrations in Manage Candidates, as well as assign background checks in any status in Manage Candidates, was released to Stage portals as part of the 21 February 2020 patch release and to Production and Pilot portals as part of the 6 March 2020 patch release.

For detailed information about this functionality, see the following topic in Online Help:

- [See Manage Candidates - Assign Integration](#)

### Implementation

This functionality is available for all portals using Recruiting and that also have at least one applicable integration enabled and active in [Edge Integrate](#).

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Assign Assessment Integration	Grants access to manage assessment integrations from the Applicant Profile page. This applies to assessments that have been configured in the integration center. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration.  This is the highest level of permission for this functionality. In addition to being able to assign assessments, users with this permission will be able to view the assessment status and assessment details.	Recruiting
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



Applicants: View Assessment Integration Status	<p>Allows user to view the assessment integration check status on the Applications tab of the Applicant Profile page. The user cannot view the link to the detailed report of the assessment. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration.</p> <p>This is the lowest level of permission for this functionality. Users with this permission can only view the assessment status; they cannot assign assessments or view assessment details.</p>	Recruiting
Applicants: View Assessment Integration Status and Details Link	<p>Allows user to view the assessment integration status and view link to access the assessment report from the Applications tab of the Applicant Profile page and from the associated column on the Manage Applicants page. This permission cannot be constrained. This permission is only available for portals that have an active assessments integration.</p> <p>This is the second highest level of permission for this functionality. Users with this permission will be able to view the assessment status and assessment details but will not be able to assign assessments.</p>	Recruiting
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
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 integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Recruiting Integrations - Manage	Grants ability to access and manage the Recruiting Integrations Preferences page. This is an administrator permission. This permission cannot be constrained.	Recruiting Administration

## Simplified Recruiter Experience in Manage Candidates - Manage Flags in Applicant Carousel

Prior to this enhancement, a Manage Flags option was available on the Manage Candidates page but was not available on the applicant carousel.

With this enhancement, you can now manage flags for one candidate at a time on the applicant carousel.

To manage flags on the applicant carousel:

1. Navigate to [RECRUIT > MANAGE CANDIDATES](#).
2. Check the box to the left of the candidate's name.
3. Click **VIEW RESUME**. This opens the applicant carousel.
4. Click **Manage Flags** from the options menu. This opens the Select Flags flyout.
5. Select one or more flags from the **Add Flags** drop-down. **Note:** *If there are no flags currently assigned to a candidate, then when you save the newly assigned flags, the text "No Flags Assigned" will be removed from the Flags column.*
6. Click **SAVE**.

Once you have saved the flags, they will appear on Manage Candidates, [provided that the Flags column is visible](#).

### Select Flags

Candidates	Flags
Kate Summers	No Flags Assigned <div>             Add Flags ▼             <div> <span>×</span> </div> </div> <div> <span>● Most Qualified</span> <span>×</span> <span>● Best Fit</span> <span>×</span> <span>● Keep on File</span> <span>×</span> </div>

Cancel
Save

## Implementation

Upon implementation, this enhancement is available for all organizations using Recruiting.

**Note:** *As part of the May '20 release, Manage Candidates is auto-enabled in all portals that have not yet self-enabled Manage Candidates. See [Manage Candidates Auto-Enabled in Production](#) on page 348 for additional information.*

[Click here to download the Manage Candidate starter guide.](#)

[Click here to access the Manage Candidates Adoption Kit.](#)

## Simplified Recruiter Experience in Manage Candidates - Request Reference Letters

## Manage Candidates - Request Reference Letters

The Request Reference Letter feature is available from the **More** drop-down on Manage Candidates. References can be requested for one candidate or in bulk.

**Pre-Step Note:** A form for completing reference letters must be available in order to use the Request Reference Letter action properly. Forms are created by the administrator in the **Manage Forms** area of the Form Management functionality.

### Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Reference Letter	Grants access to request references from an applicant and assign a reference letter form in Manage Applicants. This permission cannot be constrained.	Recruiting

### Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Reference Letter Form Complete	<p>This email is triggered when a reference letter form is submitted by the referrer. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Administration.</p> <p>Use Case: Use this trigger to notify recipients that the referrer has submitted the reference letter.</p>	Recruiting
Reference Letter Request (to external references)	<p>This email is triggered when the Reference Letter Request task is completed by an applicant in order to send a reference letter request to the external references.</p> <p>When configuring this email, the email must contain the FORM.LINK tag. If the tag is not included, then referrers will not have a link in the email that opens the reference letter form from which the referrer completes and submits their reference letter. <b>Note:</b> The link to the reference letter form is only valid for</p>	Recruiting

	<p><i>the current applicant and cannot be reused or resubmitted for a different applicant.</i></p> <p>The email can be sent to External Reference, Hiring Manager, Requisition Owner(s), Requisition Reviewer(s), or a specific user. When configuring this email, the External Reference email recipient must be selected. If this recipient is not selected, then the email will not be sent to the referrer.</p> <p>This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Administration.</p> <p>Use Case: Use this trigger to notify referrers that a reference letter has been requested of them. Reminders can also be set for this email to remind referrers to complete and submit a reference letter for the applicant.</p>	
Request References	<p>This email is triggered when the Reference Letter Request task is assigned to an applicant. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Administration.</p> <p>Use Case: Use this trigger to notify applicants that they have been assigned the Reference Letter Request task.</p>	Recruiting

### Submit Reference Letter Request from Manage Candidates Page

To submit a reference letter request:

1. Navigate to [RECRUIT > MANAGE CANDIDATES](#).
2. Check the box to the left of the candidate name.
3. Select **Request Reference Letter** from the **More** drop-down. This opens the Request a Reference Letter flyout. The candidate's name appears in the Candidates list at the top of the flyout.
4. Select a reference letter request form from the list of forms. The only forms that display are forms that are within your availability.
5. Click **Submit**. A confirmation message appears indicating whether the request was assigned successfully.

Submitting the form also triggers the Request References email notification, if enabled and active in [Email Administration](#). This email lets the candidate know they have been assigned the request form.

Candidates can launch the form from their My Profile page in the career site ([external](#) or [internal](#)) or from their [Application page in the Career Center \(Legacy\)](#). From there, they can launch and complete the form.

#### Submit Reference Letter Request from Applicant Carousel

You can request references letters from one candidate at a time via the applicant carousel. To submit a reference letter request:

1. Navigate to [RECRUIT > MANAGE CANDIDATES](#).
2. Check the box to the left of the candidate name.
3. Click **VIEW RESUME**. This opens the applicant carousel.
4. Click **Request Reference Letter** from the options menu. This opens the Request a Reference Letter flyout. The candidate's name appears in the Candidates list at the top of the flyout.
5. Select a reference letter request form from the list of forms. The only forms that display are forms that are within your availability.
6. Click **Submit**. A confirmation message appears indicating whether the request was assigned successfully.

Submitting the form also triggers the Request References email notification, if enabled and active in [Email Administration](#). This email lets the candidate know they have been assigned the request form.

Candidates can launch the form from their My Profile page in the career site ([external](#) or [internal](#)) or from their [Application page in the Career Center \(Legacy\)](#). From there, they can launch and complete the form.

#### Reassign Reference Letter Request

Once a candidate completes a reference letter task, recruiters can reassign the task if needed. The ability to reassign reference letter requests is not available outside Manage Candidates.

Reference letter requests cannot be assigned to candidates who have a reference letter request task in progress.



## Simplified Recruiter Experience in Manage Candidates - Request Reference Letters - Overview

The ability to **request reference letters** was released to Stage portals as part of the 3 April 2020 patch release and is now available in Production/Pilot portals as part of the May '20 release.

### Implementation

This feature is available for all portals using Recruiting.

### Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Reference Letter	Grants access to request references from an applicant and assign a reference letter form in Manage Applicants. This permission cannot be constrained.	Recruiting

## Simplified Recruiter Experience in Manage Candidates - Suggested Referrals and New Submissions

### Redirect Suggested Referrals and New Submissions to Manage Candidates

As part of the February '20 release, when clicking the link in the Referrals column or the New Submissions column on the Manage Requisitions page in Stage portals, recruiters were redirected to a filtered view of Manage Candidates that showed only the suggested referrals or new submissions from the selected requisition.

As part of the May '20 release, this feature is now released to Production and Pilot portals.

### Suggested Referrer's Name in Source Column on Manage Candidates

Also as part of the February '20 release, the name of the user who submitted the suggested referral now appears in the Source column. In addition, the user's relationship to the candidate appears.

### Deprecation of Suggested Referrals and New Submissions Pages

As part of the May '20 release, support for defects related to the Suggested Referrals and New Submissions pages is no longer available.

With the August '20 Release, the deprecation will be complete with the removal of the Suggested Referrals and New Submissions pages in all environments.

See **Deprecation of Suggested Referrals and New Submissions Pages with the August '20 Release** on page 345 *for additional information*.

### Implementation

Direct links to Suggested Referrals and New Submissions on Manage Candidates was enabled in Stage portals with the February '20 release and is now enabled in Production and Pilot portals with the May '20 release.

The suggested referrer's name in the Source column on Manage Candidates was made available in all portals with the February '20 release.

## Tag Support on Thank You Step

## Tag Support on Thank You Step - Overview

Prior to this enhancement, tracking pixels could be added to custom Thank You pages in mobile friendly application workflows. While recruiters could use tracking pixels to capture data such as device used, ad clicks, and previous pages visited, it was challenging to match this data to hired employees.

With this enhancement, USER.GUID and JOB.REQUISITION.ID tags can be added to custom Thank You pages on application workflows so that recruiters can use the data gathered from the tracking pixel to connect hired candidates to the data that is tracked.

### How Does This Enhancement Benefit My Organization?

- Find out which applicant sources yield the most qualified candidates.
- Easily identify and track where hired employees came from based on their application source.
- Measure which paid sources generate the most traffic and most qualified candidates.

### Use Case

ACME uses a Recruitment Marketing tool in addition to their Applicant Tracking System (ATS) to help manage spend on job ads, measure the performance for marketing initiatives, and track the applicant conversion funnel. A recruiter for ACME posts six jobs that have opened up in a newly created department at her company. She posts the jobs to ACME's career site and four job boards. In the application, she includes a custom Thank You step that includes a tracking pixel given to her by their Recruitment Marketing tool. This tracking pixel includes a place to add a unique candidate and requisition identifier. The recruiter replaces this content with the USER.GUID and JOB.REQUISITION.ID tags. This tracking pixel will fire with the new tags once an applicant successfully applies to a position.

Once hires have been made, she runs a report in Reporting 2.0. This report filters candidates who are in a Hired status and includes candidates' USER GUID and Job Requisition IDs. This report is shared with their Recruitment Marketing solution so that they can marry their tracking pixel data to hired employee data.

When looking at the Recruitment Marketing tool, the recruiter will be able to identify which ads, devices, or any other information picked up from the tracking pixel yield the highest number of hired candidates.

### Implementation

This enhancement is available to all organizations using Recruiting.

### Permissions

The following existing permissions apply to this functionality:

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

Application Workflow Template - Manage	Grants ability to access and manage Application Workflow Templates. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration
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 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

## Application Workflow - Add Tags to Thank You Step

With this enhancement, USER.GUID and JOB.REQUISITION.ID tags can be added to the Instructions and Text sections of the Thank You step. When used in the application, the tags allow recruiters to determine where they're sourcing hired candidates by running a report to return tracking data.

Depending on the tracking pixel provider, when tags are added and sent via a tracking pixel, you may see the following and more:

- Which pages the applicant viewed prior to applying
- Which job ads the applicant clicked on
- What type of device the applicant used to apply

To create an application workflow template, go to [ADMIN > TOOLS > RECRUIT > APPLICATION WORKFLOW TEMPLATES](#). Then click the **Create Template** link.

### Permissions

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

### Add Tags

The USER.GUID and JOB.REQUISITION.ID tags can be added from the HTML or standard view of the Instructions and/or Text sections when editing the Thank You step of the application workflow. The tags may be added directly to the HTML of the tracking pixel.

For example, the following is sample HTML for a tracking pixel, showing where the tags would be placed in the HTML (the yellow highlighting is only for emphasis):

```

```

When candidates view the Thank You page, the tracking pixel is not visible.

Edit Action Item

English (US)

☐ Use the default Thank You page.

This page thanks the applicant for applying and contains buttons directing them back to search and to claim their account. Any custom text or instructions added will disappear after checking this box.

Title

Instructions:

B I U [List Icons]

Design <> HTML

Text:

B I U [List Icons]

Design <> HTML

Tags

Display a list of tags that can be used within the instructions and text body of the thank you step. These tags may only be used with a custom thank you message.

Save Cancel