Cornerstone Release Notes February 2020

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Release Notes for February 2020

What's New for February '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 February '20 Release** on page 20 *for additional information.*
- **New Reporting Fields** - This topic provides a list of all reporting fields that are newly added with this release. *See* **Master List of New Report Fields for February '20 Release** on page 25 *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 February '20 Release** on page 26 *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 February '20 release:

Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
API Authentication: OAuth 2.0 - Granular Scopes		With the August 2019 release, OAuth 2.0 was made generally available. OAuth 2.0 is an industry-standard authentication and authorization protocol for APIs. Using this protocol reduces the time and effort needed by external developers to integrate with the Cornerstone system. With this enhancement, the ability to select granular scopes is now available, allowing organizations to control the methods and endpoints an application can access through Cornerstone's APIs using the OAuth 2.0 API credentials. A "scope" is a mechanism in OAuth 2.0 which is used to limit an external application's access. This enhancement is not available with UAT. This enhancement will be available with the Feb 7th release.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Back-end Optimizations to People, User, and OU Searches	Yes	Beginning in March 2020, Cornerstone will begin back-end optimizations to improve People, User, and Organizational Unit (OU) searches. No changes to Core search features, specifically People, User, and OU searches, should be observed by administrators or end users. Search querying and results should match the existing experience. *This functionality will be released in a post-release patch.*
Banner Core Data Inbound Integration	Available in Edge Marketplace	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 will be released in a post-release patch.*
Cornerstone Mobile App Deprecation - April 2020	N/A	Cornerstone has two mobile application offerings in existence today: ○ Cornerstone Mobile ○ Cornerstone Learn (Introduced in February '18 Release) In an effort to provide a more modern mobile experience, the Cornerstone Mobile app is scheduled for deprecation. The Cornerstone Mobile app will be deprecated and removed from the Apple App and Google Play stores on April 30, 2020.
Data Load Wizard - Additional Validation for Active Period Data	Yes	When using the User data load in Data Load Wizard to update active period data, the Active value must be set to True, and an Activation Date and Deactivation Date must be provided. *This functionality was released with the 10 January 2020 patch.*
Data Load Wizard - GUID Required to Convert	Yes	When using the User data load in the Data Load Wizard, a new validation has been added. When converting an applicant to an employee via the User load in the Data

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Applicant to User		Load Wizard, the user's GUID must be provided. Lack of a GUID will result in an error. *This functionality was released with the 6 December 2019 patch.*
Edge Import - LMS Historical Data and Employee and OU Bulk Loads and Feeds (Early Adopter)	No	With the February ’20 Release, Edge Import is available to organizations as an Early Adopter for Employee/Organizational Unit (OU) loads and feeds and also for loading Learning Management System (LMS) historical data. *Note: The Employee load and feed currently cannot be used by organizations using Cornerstone HR (CHR).* *The LMS data load is not available until a post-release patch.*
Email Deactivation Warning Message	Yes	With this enhancement, when an administrator navigates to Email Administration and selects one or more emails to be deactivated, a pop-up appears requiring the administrator to confirm their action. The pop-up states: "We have noticed that you are attempting to deactivate email(s). Are you sure you would like to continue?" *This functionality is not available during UAT.*
Enabling Captcha Globally	Yes	With this enhancement, when CAPTCHA functionality is enabled in a portal, "www.recaptcha.net" is automatically used in regions where "www.google.com" is not accessible, allowing for all users globally to utilize CAPTCHA based validation.
Expire User Sessions at Password Reset	Yes	With this enhancement, anytime a user resets their password, they are logged out of the system and are required to log in with the new password to access the portal. *This functionality was released with the 1 November 2019 patch.*
February '20 Language Pack Updates	Yes	New updates to Cornerstone Language Packs are available with the February ’20 Release. Please visit the **Language Pack Updates** topic in the Success Center to review the

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		full list of changes. The list of changes are available on January 6 and finalized on January 13.
jQuery Library Upgrade in May '20 Release	Yes	With the May ’20 Release, jQuery 1.7 will be deprecated and replaced with jQuery 3.4 libraries in all portals. 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, pages utilizing the custom code will not work as expected.
STS Authentication Deprecation to Begin in February 2020		Cornerstone's custom authentication framework, Session Token Service (STS), will be deprecated in February 2020 and will be fully retired and unavailable in February 2021. During the deprecation phase, Cornerstone will stop supporting 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.
Reporting 2.0 (Early Adopter) Enhancements	Yes, after **enabling Reporting 2.0**	The following features are available with the February '20 release: ○ **Aggregate Values and Totals** ○ **Additional Summary Options for Chart Data** ○ **Incumbent Permissions/Constraints Apply to Succession Reports** ○ **Expand/Collapse Filter Section on Report Viewer** ○ **Applicant User Alias** - ***Note:*** *This functionality was previously made available as part of the 6 December 2019 patch release.*
RTDW Updates to Reporting API, RDW, and Data Exporter		Impacting only clients using Reporting API, Replicated Data Warehouse, 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.

Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Secure User Custom Fields	Yes	Newly created short text, scrolling text, date, and numeric user custom fields can be configured as secure fields, using a new "Secure" checkbox on the Custom Field Administration page. *This functionality will be released with the May 2020 release.*

Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Cornerstone Learn - Additional Custom Links	Yes	With this enhancement, organizations using the Cornerstone Learn app can add up to ten custom links to the navigation panel of the app. These custom links can be configured via the Mobile Preferences page. This enhancement will be made available during a post-release patch.
Cornerstone Learn App Update	Yes	With the March 6 2020 patch, users of the Cornerstone Learn app will be forced to upgrade to the latest version of the app the next time they launch it. For users who have opted to
Cornerstone Learn - Device Registration	Yes	With this enhancement, users can register mobile devices and generate a device key as an alternative authentication method for logging into the Learn app. This enhancement will be available in a post-release patch.
Cornerstone Learn - Improved Login Experience	Yes	With this enhancement, the Cornerstone Learn app mobile login process has been improved to reduce friction and provide mobile learners with a more intuitive experience. This enhancement is not available at the start of UAT.
Cornerstone Learn - Offline Course Deletion	Yes	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.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Cornerstone Learn - Playlists	Yes	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 in a post-release patch.
Cornerstone Learn - Training Approvals	Yes	With this enhancement, approvers with pending training approval requests can process them via a new Approvals tab in the Cornerstone Learn app.
Coursera for Business Integration	No	The Cornerstone OnDemand and Coursera for business integration enables organizations to manage their Coursera content within the Cornerstone learning management system (LMS). With this integration, Coursera courses can be automatically synchronized to the LMS catalog, where they can be managed like other system training types. This integration will not be available at the start of UAT.

Curriculum Versioning Enhancements	Yes	With the February 2020 release, the following enhancements have been 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**

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		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. This enhancement was made available on Jan 23 2020.
Create Tool - Remix Grovo Courses	Yes	With this enhancement, organizations can remix the Grovo courses included in content packages they have purchased. Organizations which have purchased Content Anytime or any other partial content package which includes Grovo courses will be able to remix the Grovo courses within that package using the Create Tool.
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.
Deprecation of Volunteer Management		Cornerstone is deprecating Volunteer Management functionality with the February '20 release, and has ended support for Volunteer Management. Once deprecated, access to the Volunteer Management user interface, including reporting, will no longer be available in client portals. Deprecation will occur in Stage at the start of UAT and in other environments with the February '20 Release.
DMS Course Codes		With this enhancement, any portal using a DMS integration can automatically generate course codes when materials are created or versioned through DMS. If the existing course code preference is enabled, any materials created or versioned through DMS will also be associated with a course code.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
edX for Business Integration	No	The Cornerstone on Demand (CSOD) and edX for Business integration enables organizations to manage their edX content within the Cornerstone learning management system (LMS). With this integration, edX courses can be automatically synchronized to the LMS catalog, where they can be managed like other system training types.
Enhanced HTML Security for Training Description and Training Custom Fields	Yes	With the February 2020 release, HTML security for training descriptions and training custom fields has been enhanced, allowing all HTML markup in these fields to be sanitized on output. This means HTML markup can be correctly formatted without presenting XSS risk. With this enhancement to HTML security, organizations no longer need to sign a waiver acknowledging the risk that previously existed for HTML markup.
External Content with Smart URLs	Yes	With this enhancement, the system can identify duplicate External Content using the following criteria: ○ Direct URL match ○ Canonical URL match ○ YouTube link variety
Learning Assessments - Admin Experience (Open Beta)	No	With a post-February 2020 release patch, an open beta of a reimagined Test Engine is available. The redesigned experience is called Learning Assessments and is available to test in Stage portals only. This beta version of Learning Assessments does not yet have feature parity with the existing Test Engine. The following features are available with Learning Assessments: ○ Assessment Creation (allows administrators to define metadata for the assessment) ○ Assessment Builder (allows administrators to build the assessment structure) ○ Assessment Preview ○ Settings Adjustment ○ Assessment Home (allows administrators to view and manage previously created assessments)

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		This enhancement will be made available with the Feb 21 2020 patch.
Learning Assignment Tool API		A new Learning Assignment Tool public API is available via the Edge Marketplace. This public API offers flexibility when a custom solution for the Learning Assignment Tool is required by an organization. With the new Learning Assignment API, users can enjoy many of the same features that exist in the Learning Assignment Tool user interface. This API is not available during UAT; it will be made available with the Feb 7th release.
Learning Assignment Tool Enhancement	Yes	Prior to this enhancement, a new version of a material would be assigned to users who were no longer included in a learning assignment's user criteria, because they previously had the material assigned to their transcript when they were included in the learning assignment's user criteria. With this enhancement, this behavior has been corrected, and users who are no longer part of a learning assignment's user criteria do NOT receive an updated version of a material when the material is upgraded for the learning assignment.
Learning Details Redesign (Early Adopter) Enhancements	Yes, if using Learning Details page	In 2019, a redesigned Learning Details page was released as an Early Adopter enhancement. With the February 2020 release, the Learning Details page is still in an Early Adopter status, and the following additional enhancements have been made to this feature: ○ A permanent **Notify Me** link is available for sessions (implemented Nov 1 2019) ○ Users can generate an exception request when a session or curriculum they are requesting has a prerequisite training item that the user has neither requested nor completed (implemented Nov 1 2019) ○ Optimizations have been made to page load performance (implemented Nov 15 2019) ○ A session scheduling conflict pop-up displays when a learner attempts to register for a session that conflicts with another session (implemented Dec 20 2019)

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		○ Session registration deadlines display on the Session flyout and in the Upcoming Sessions section (implemented Jan 10 2020) ○ Session rosters are accessible to instructors via the Session flyout and in the Upcoming Sessions section (implemented Jan 10 2020) ○ Training contact information displays on the Session flyout for each session (implemented Jan 10 2020) ○ Prices for upcoming sessions display in the Upcoming Sessions section, when applicable (implemented Feb 7 2020)
Learning Modalities (Early Adopter) Enhancements		Using Learning Search Preferences, administrators can allow users to filter by modality when searching for training. With the February 2020 release, modality filtering remains in an Early Adopter status, and when enabled, training items are mapped the following non-configurable modalities: ○ Read ○ Watch ○ Attend ○ Collections ○ Listen (new with Feb 2020) ○ Practice (new with Feb 2020) The following additional features have also been added to Learning Modalities functionality with the Feb 2020 release: ○ Modalities can be configured for individual training items ○ Training can be mapped to multiple modalities ○ Modalities can be configured in bulk via the Course Catalog
Learning Search - Exact Title Match	Yes	With this enhancement, users can receive exact title matches for training items offered in languages that are not their own by searching for the training using its default title.
Online Content	Yes, for organizations using third-	With this enhancement, a new training type called "online content" is available, which supports third-party online content hosted on the provider's servers and delivered to the

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
	party content integrations	Cornerstone system through a subscription. Online content is different from other training types because online content training is hosted outside the Cornerstone system, unlike other training types which are added directly to the Cornerstone system by administrators. When used in tandem with the Progress API, online content can be reported on in detail, including information such as completion status, time spent, score, and bookmarks.
Online Course Versioning - Due Date Criteria Enhancement	Yes	With this enhancement, administrators can still apply an exact due date from the previous online course version to the new version if desired, but they can also apply relative due date criteria to the new online course version by selecting the new **Apply Previous Version Due Date Criteria** option. This more dynamic due date setting provides increased flexibility when configuring due dates for reversioned online courses.
Reporting - Learning Fields	Yes	With the February 2020 release, the following enhancements have been made to Learning reporting: ○ A new **Standalone on Transcript** field for Custom Reporting and Reporting 2.0 allows administrators to report on whether a training item is standalone training on a user's transcript. This enhancement was made available with the Nov 15 2019 patch. ○ New certification fields are available in Reporting 2.0. This enhancement will be available in a post-release patch. ○ Subject reporting is now available for Reporting 2.0. This enhancement was made available on Jan 21 2020.
Transcript Enhancements	Yes	With the February 2020 release, the following enhancements have been made to the options available on the learning transcript: ○ Clicking on the title of a training item from the transcript redirects the user to an actionable page for the training instead of the Transcript Details page, which could not be used to launch the training

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		○ Numerous actions available on the Transcript Details page have been added to the Actions drop-down menu for training items on the transcript

Learning - Content Anytime

FEATURE NAME	DESCRIPTION
Content Anytime Digital Native Advancement (DNA)	The Professional Skills content subscription has been enhanced with a new original microlearning series called Digital Native Advancement (DNA), which prepares digital natives for the workforce. The series includes twenty-seven nano learning courses which are quick, easy to consume, highly visual, and mobile-first.
Content Anytime Leadership & Management Subscription - Plan Z	A new Cornerstone Originals microlearning series called Plan Z is now available as a companion to the Digital Native Advancement (DNA) series. Instead of focusing on the end learner, this series is designed to help managers and HR leaders work with and welcome digital natives. Managers of digital natives can learn how to more effectively coach, communicate with, empower, and lead their employees.
Content Anytime Modern Compliance Subscription - New Grovo Content	Compliance regulations are constantly evolving, so we have evolved the Content Anytime Modern Compliance subscription to include new Grovo microlearning lessons which meet compliance requirements for California, Canada, and the higher education markets. New Grovo lessons cover the topic of Sexual Harassment, designed for employees and supervisors in California and Canada, as well as educators, administrators, and employees at higher education institutions who need mandated training on FERPA and TITLE IX.
Content Anytime Professional Skills Subscription - New	New Grovo microlearning lessons on work/life balance, storytelling, developing confidence, and practicing mindfulness at work are now available. These lessons are designed both for employees who are new to the workforce and for more senior employees facing new professional challenges. 150+ Grovo lessons have also been newly localized in French, German, and Spanish, to better meet the needs of EMEA organizations. This subscription

FEATURE NAME	DESCRIPTION
Grovo Content & Learning Pathways	also now includes new Learning Pathways, which are designed to help learning administrators increase engagement and adoption of the content in this subscription. Each Pathway includes a variety of courses and blended learning activities.

Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Auto-Upgrade to Development Plans Redesign with the May '20 Release	Yes	Cornerstone's legacy Development Plan module is scheduled for deprecation with the May '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. *This functionality was announced with the 20 May 2019 release.*
Bypass Development Plan Approval Permission	Yes, automatically added to the System Administrator security role	With this release, a new permission "Bypass Development Plan Approval" grants permission to bypass any development plan approval requirements when submitting or assigning a development plan. This is a system administration permission.
Check-Ins Enhancements	Yes, except GDPR and CCPA compliance.	With this release, the following changes and enhancements are now available: ○ Check-Ins will be ready for General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). ○ Users can now Archive and Restore Walk-In topics. ○ When managing topics, users can switch from Meeting View to Topic View . ○ All Check-Ins Reporting 2.0 fields are now available.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Compensation Approvals – UP Actions Tab	Yes	With this release, compensation approvals will be moved to the Actions tab in the user's Universal Profile. None of the compensation approval functionality is changing. *This feature is not available at the start of UAT.*
Conversations Renamed to Check-Ins	Yes	With this release, all product references to "Conversations" will be changed to "Check-Ins". This is a name change only; all functionality remains the same. *Not all references to "Conversations" within the Check-Ins application pages will be renamed at the start of UAT in Stage. URLs, the navigation bar, and configuration pages will only be accessible at the February 7, 2020 release.*
Dev Plan Preferences - Separate "Continue Learning" Carousel from Machine Learning Toggle	Yes	With this release, the "Continue Learning" feature is removed from the Machine Learning toggle so that administrators can enable it separately and end-users can view a separate Continue Learning carousel.
Dynamic Shared Goals	Yes	Prior to this enhancement, to add or remove users to a shared goal, users had cancel the entire goal for everyone and recreate it, or create new goals to share with the new team members. Users who are authorized to edit shared goals can use the Edit Goals page to easily add and remove contributors to shared goals.
Flash No Longer Needed to Run SMP PowerPoint Template Report		The SMP PowerPoint Template Standard Report no longer needs Adobe Flash enabled to upload a template. The Flash icon has been removed and users will be prompted to upload a template be default. *This functionality was announced with the 15 November 2019 patch.*
Maximum Assigned	Yes	With this release, administrators now have the capability to establish a maximum number of assigned goals in order to

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Goals Enhancement		conform to organizational policy. Additionally, an error message appears if users try to assign more than the maximum number of goals. A new Email digest option is now available so that administrators can configure the Email Digest to send an automated report to users and users' managers to inform them that a user is not in compliance with the maximum assigned Goals policy of the organization.
Mobile Responsive - Goals, Skills Matrix, Observation Checklists, Universal Profile	Yes	With this release, we are improving the response capability on mobile devices when using the following Performance Suite pages: ○ Goals - Goals List, Goals Creation, Manage Shared Goals, Pending Goals, Goals Configuration, Goals Preferences, Goals Library, Goals Perspective. ○ Skills Matrix - Skills Matrix, Skills Matrix Competency Details. ○ Observation Checklists - Manage Observation Checklists, Checklist Details, Checklist Report, Checklist Summary, Observation Notes. ○ Universal Profile - Bio, Feedback, Feedback Details, Snapshot (Dev Plans, Goals, Reviews). *Observation Checklists and Skills Matrix pages are mobile responsive as of the 20 December 2019 patch.*
Reporting - Development Plan Field	Yes	With this release, the Training ID field is reportable for Development Plans in Reporting 2.0.
Restore Deleted Users to Succession Tasks	Yes	With this enhancement, the Task Details page now provides a **Visibility** drop-down that administrators can use to view active and deleted users. Additionally, a plus sign icon is provided in the **Options** column to restore users that were deleted from an active Succession task.

Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Candidate Email Verification	Yes	With this enhancement, administrators can require candidates to verify their email address before gaining access to sensitive application materials via My Profile on the career site. Verification is performed when the candidate clicks a verification link in a system-generated email that is automatically sent when they create their account. The link opens the career site, where a message appears indicating whether the verification was successful. From here, candidates can quickly access the job search page and their My Profile page.
Broadbean OFCCP Integration	Available in Edge Marketplace	*This functionality was previously made available as part of the 1 November 2019 patch release.* OFCCP Compliance provider with non-government partnerships, which acquires Cornerstone job listings and distributes to state workforce agencies and their technology partners.
Candidate Messaging & SMS (Pilot)	Available to Pilot Program Participants Only	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.
Clinch Talent Integration	Available in Edge Marketplace	*This functionality was previously made available as part of the 1 November 2019 patch release.* Cornerstone and Clinch seamlessly integrate to deliver an optimized candidate experience to help talent acquisition teams recruit more effectively with less manual effort. Covering every step of the candidate journey - from first visit to the careers site all the way through apply, hire and pre-boarding.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Enhance the Manage Candidates Applicant Carousel	Yes (some features are not available at the start of user acceptance testing [UAT])	With this enhancement, the resume carousel on Manage Candidates will be replaced by an applicant carousel. This is accessed when selecting a candidate and clicking **View Resume** from the **More** drop-down on Manage Candidates. The applicant carousel is a centralized location for recruiters to evaluate a candidate's application, assess their qualifications, and easily take actions on a candidate. Recruiters can evaluate the resume and prescreening questions, read and write contextual information about the candidate, and take actions without navigating to another page. This reduces the time it takes to hire the right candidate and improves recruiter satisfaction.
HireRight Global Employment Screening Integration	Available in Edge Marketplace	*This functionality was previously made available as part of the 20 December 2019 patch release.* The HireRight Global Employment Screening integration lets you order any of the HireRight 200+ global background screening and drug testing services directly from within Cornerstone. Status updates are provided in real-time, providing you with fast and reliable visibility into screening orders.
Hiring Manager Experience: Request Candidate Feedback	Yes (some features are not available at the start of user acceptance testing [UAT])	With this enhancement, recruiters can share candidates with hiring managers or business stakeholders at any point in the recruiting process and across all available requisitions. The request candidate feedback feature is a single workflow, allowing hiring managers to provide feedback quickly, reducing time to screen and hire the right candidates. In addition, this feature allows recruiters and hiring managers to better align on applicants and key competencies.
Removal of Group Filter from Onboarding Dashboard	Yes	*This functionality was previously made available as part of the 6 December 2019 patch release.* With this enhancement, the **Group** option is removed from the filter. This is being done to alleviate confusion and improve the onboarding experience.
SHL Talent Assessme	Available in Edge Marketplace	*This functionality was previously made available as part of the 20 December 2019 patch release.*

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
nts Integration		The SHL Talent Assessments integration lets recruiters identify best-fit candidates, using targeted, predicted assessments, and provides an engaging, candidate-centric experience to help you attract the top candidates. This integration is available for clients using SHL TalentCentral.
Simplified Recruiter Experience in Manage Candidates	Yes (some features are not available at the start of user acceptance testing [UAT])	With this enhancement, information and actions that were previously only available on the Manage Applicants, Suggested Referrals, and New Submissions pages have been moved to Manage Candidates so that recruiters can use one access point to more efficiently and effectively manage all their candidates for all their requisitions.
Sterling RISQ Background Check Integration	Available in Edge Marketplace	*This functionality was previously made available as part of the 1 November 2019 patch release.* A background screening solution between Cornerstone Recruiting and Sterling's RISQ platform that frees teams from manual, time consuming tasks related to screening program, while also providing real-time screening results directly into Cornerstone.
Talent Plus TalentBank Integration	Available in Edge Marketplace	*This functionality was previously made available as part of the 15 November 2019 patch release.* The Talent Plus integrations provides a seamless candidate experience and easy access to Talent Plus assessment recommendations and results. When a Talent Plus assessment is associated to a job requisition, candidates are taken to Talent Plus to complete the assessment. The Talent Plus system sends the results back to Cornerstone, including the recommendation statement and score, as well as a link to the candidate's results.

New and Enhanced Permissions for February '20 Release

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

New Permissions

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

Edge Import

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access CHR - Employee Load	Grants access to the Cornerstone HR (CHR) employee data load via Edge Import. This permission and data load type are only available to organizations using CHR. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Cost Center	Grants access to the Cost Center OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Custom OU	Grants access to the Custom OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Division	Grants access to the Division OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Grade	Grants access to the Grade OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Legal Entity	Grants access to the Legal Entity OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Location	Grants access to the Location OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Access Edge Import Workflow - Position	Grants access to the Position OU data load via Edge Import. 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

Performance

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bypass Development Plan Approval During Assignment	Grants permission to bypass any development plan approval requirements when submitting or assigning a development plan. This is a system administration permission.	Performance

Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Private Comments	Grants ability to read all advance/do not advance feedback when reviewing candidates in Manage Candidates. ***Note:*** *All users who have the Applicants: Comments - Manage permission upon implementation of this enhancement will be assigned the Manage Private Comments permission automatically.*	Recruiting Administration
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

Enhanced Permissions

The following existing permission is enhanced for the February '20 release:

Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Modality Preferences	Grants access to Modality Preferences, where an administrator can configure settings related to learning object (LO) modalities. This is an administrator permission.	Learning - Administratio n
Reporting - Learning - Subject - Manage	Grants ability to create and edit Subject reports. This permission can be constrained by User Self and Subordinates, OU, User's OU, User's Direct Subordinates, and User. This permission can also be constrained by training, which returns training items associated with a subject.	Reports - Analytics
Reporting - Learning - Subject - View	Grants ability to view the results of Subject reports. This permission can be constrained by User Self and Subordinates, OU, User's OU, User's Direct Subordinates, and User. This permission can also be constrained by training, which returns training items associated with a subject.	Reports - Analytics

Master List of New Report Fields for February '20 Release

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

Learning

FIELD NAME	SECTION	CUSTOM REPORT NAME	APPLICABLE TO REPORTING 2.0?
Assigned Date	Certification	Certification Report	Yes
Certification ID	Certification	Certification Report	Yes
Equivalent Subject Name	Subject	Custom Subject Report	Yes
Equivalent Subject ID	Subject	Custom Subject Report	Yes
Parent Equivalent Subject	Subject	Custom Subject Report	Yes
Parent Equivalent Subject ID	Subject	Custom Subject Report	Yes
Parent Subject ID	Subject	Custom Subject Report	Yes
Parent Subject Name	Subject	Custom Subject Report	Yes
Standalone on Transcript	Transcript Section, Curriculum Section	Custom Transcript Report, Custom Curriculum Training Report	Yes
Status Change Date	Certification	Certification Report	Yes
Subject Default Language	Subject	Custom Subject Report	Yes
Subject ID	Subject	Custom Subject Report	Yes
Subject Name	Subject	Custom Subject Report	Yes
Training Object Title	Subject	Custom Subject Report	Yes
Training Object ID	Subject	Custom Subject Report	Yes
Users Saved this Subject	Subject	Custom Subject Report	Yes

Release Notes Updates for February '20 Release

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

Changes made on 3 April 2020

Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Secure User Custom Fields	Secure User Custom Fields	The topic was updated to reflect that the enhancement is moved to the May release.

Changes made on 7 February 2020

Core/General

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
API Authentication: OAuth 2.0 - Granular Scopes	API Management - Scopes	Updated the screen shot for the Register New Application page and update the description of how to select scopes for APIs.
Back-end Optimizations to People, User, and OU Searches	Back-end Optimizations to People, User, and OU Searches	This is a new enhancement added to the February 2020 release.
Edge Import - LMS Historical Data, Employee and OU Bulk Loads and Feeds (Early Adopter)	Edge Import - LMS Historical Data, Employee and OU Bulk Loads and Feeds (Early Adopter)	Added limits and best practices.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Cornerstone Learn App Update	Cornerstone Learn App Update	This is a new enhancement added to the February 2020 release.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Curriculum Versioning Enhancements	Upgrade Child LOs	Added examples of the new child LO upgrade behavior.
Curriculum Versioning Enhancements	Structure Modification History Page	○ Added the following information: 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 reversioned 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.* ○ Updated the list of features available on the Structure Modification History page to include Changed By and Change Description.
Online Content	Online Content - Overview	This is a new enhancement added to the February 2020 release.
Learning Assignment Tool Enhancement	Learning Assignment Tool Enhancement	This is a new enhancement added to the February 2020 release.
Reporting - Learning Fields	Reporting - Subject Reporting	○ Corrected the field previously referred to as **Parent Equivalent Subject** to **Parent Equivalent Subject Name.** Clarified that the Subject User section is an alias for the existing User section available in reporting. Clarified that the Subject Training section is an alias for the existing Training section available in reporting, but also contains two new subject-related fields.
Transcript Enhancements	Transcript Enhancements - Actions	○ Updated this topic to clarify expected behavior when the Learning Details page is NOT enabled and a user clicks the title of a training item from their transcript.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		○ Also updated topic to reflect that clicking the title of a certification redirects the user to the Transcript Details page.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Check-In Participant Alias		When creating a Check-Ins Report, the name of the "User" field grouping will appear as "Check-In Participant." Since “User” is being replaced for this report type, the “Reporting - Core - User - [subgroup]” permissions no longer apply to the report. Instead, “Check-In Participant” fields utilize the existing “Reporting - Performance - Check-Ins - View” permission. *This enhancement is available in stage as of the February 5 UAT deployment.*
Dynamic Shared Goals		*This feature is removed from the February 2020 release and will be available in a future release.*
Point-In-Time Headcount - New Fields		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

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Simplified Recruiter Experience in Manage Candidates	Simplified Recruiter Experience in Manage Candidates - Overview	Updated the availability date for the following: ○ Assign Integrations - Available in Stage portals with the 21 February 2020 patch release. Available in Production and Pilot portals with the 6 March 2020 patch release. ○ Assign Forms - Available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release. ○ Invite to Event - Available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release. Added the feature "Request Reference Letters" as an upcoming feature that will be available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release.
Simplified Recruiter Experience in Manage Candidates	Simplifying Manage Candidates Enhancements	Updated the availability dates for assign integrations. Added information for the upcoming assign forms, invite to an interview event, and request reference letters features.

Changes made on 28 January 2020

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
DMS Course Codes	DMS Course Codes	This is a new enhancement.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Check-Ins	Conversations Renamed to Check-Ins	○ Added a graphic in the Performance Management section.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		○ Added specifics for name changes not available during UAT.

Changes made on 24 January 2020:

Core/General

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Banner Core Data Inbound Integration	Banner Core Data Inbound Integration	This is a new enhancement.
Cornerstone Mobile App Deprecation - April 2020	Cornerstone Mobile App Deprecation - April 2020	Updated the deprecation date from March 30, 2020 to April 30, 2020.
Email Deactivation Warning Message	Email Deactivation Warning Message	This is a new enhancement.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Curriculum Versioning Enhancements	Curriculum Versioning Enhancements - Overview	Added the following information: ***Note:*** *This project is part of the larger multi-release Learning Compliance Scalability Initiative. The release of this project concludes the Learning Compliance Scalability Initiative.*
Curriculum Versioning Enhancements	Structure Modification History page	Updated description of **Export** option to clarify that Structure History data can only be exported in PDF format.
Learning Assignment Tool API	Learning Assignment Tool API	Added the following consideration: The API does not currently support assigning instructor-led training (ILT) events and sessions in a Completed status if they occurred in the past

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learning Details Redesign (Early Adopter) Enhancements	Learning Details Redesign (Early Adopter) Enhancements - Session Price	Added enhancement: Prices for upcoming sessions display in the Upcoming Sessions section, when applicable (implemented Feb 7 2020)
Learning Details Redesign (Early Adopter) Enhancements	Learning Details Redesign (Early Adopter) Enhancements - Session Scheduling Conflict Pop-Up	Corrected the names of the buttons in the Session Scheduling Conflict pop-up.
Online Course Versioning	Online Course Versioning - Overview	Added the following information: ***Note:*** *This project is part of the largermulti-release Learning Compliance Scalability Initiative. The release of this project concludes the Learning Compliance Scalability Initiative.*
Reporting - Learning Fields	Reporting - Standalone on Transcript Field	Updated field description to state that the Standalone on Transcript field is a Yes/No field.
Transcript Enhancements	Transcript Enhancements - Actions	Updated documentation to accurately describe what happens when a user clicks the title of an external training item from the learning transcript page.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Check-Ins	Check-Ins Enhancements	Updated the archive instructions and added graphics for all topics.
Check-Ins	Conversations Renamed to Check-Ins	Removed the following sections: ○ Security Objects Page ○ Security Object Names ○ Feature Enablement Dashboard These areas are not available to clients.

Changes made on 17 January 2020:

Core/General

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - LMS Historical Data, Employee and OU Bulk Loads and Feeds (Early Adopter)	Edge Import - LMS Historical Data, Employee and OU Bulk Loads and Feeds (Early Adopter)	Added links to starter guides and clarified implementation information for organizations currently using the Data Load Wizard OU or User loads.
Reporting 2.0 (Early Adopter) Enhancements	Aggregate Values and Totals	Removed the Aggregates with Summary section, which included unavailable features for showing subtotals, as well as showing/hiding row details and row count. The “Show Grand-totals” refers to the ability to show a grand summary in a summarized report, which is referenced in the overview section of the “Aggregate Values and Totals” topic.
Reporting 2.0 (Early Adopter) Enhancements	Usability Enhancements	Added “Date Format in Chart” section to indicate that the date format in the chart matches that of the report format. Clarified in the “Additional Summary Options for Chart Data” section where the additional summarizing options appear when configuring a chart.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Cornerstone Learn - Improved Mobile Login Experience	Cornerstone Learn - Improved Mobile Login Experience - Overview	Added the following bullet point to the overview: ○ Alternative Login Method Selection - Users can toggle between login methods, allowing them to switch between SSO and credentials if needed. After entering a valid portal name on the initial login screen, the **Alternative Login Method** link becomes enabled. Tapping this link opens a modal, in which the user can switch login methods. The user will then progress through the existing login flow,

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		ultimately allowing them to set a PIN or enable biometric authentication and log in to the app. Also added additional navigation information and considerations.
Learning Modalities (Early Adopter) Enhancements	Learning Modalities (Early Adopter) Enhancements	Deleted line which stated that Learning Modalities are activated by default in Stage. The option to allow users to filter by learning modality is NOT auto-enabled in Stage or other portal types.
Learning Modalities (Early Adopter) Enhancements	Learning Modalities (Early Adopter) - Learning Feature Activation Preferences	Updated explanation of impact to Learning Search Preferences page to state: "Learning modalities can be modified for individual organizational units (OUs) here." Also added the following note: Important: It may take up to an hour for this functionality to be available in your portal after it is activated.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Compensation Approvals – UP Actions Tab	Compensation Approvals – UP Actions Tab	Added the following note: *This feature is not available with UAT.*
Dev Plan Preferences - Separate "Continue Learning" Carousel from Machine Learning Toggle	Dev Plan Preferences - Separate "Continue Learning" Carousel from Machine Learning Toggles	Added the following note: *This feature is not available with UAT.*

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Candidate Messaging & SMS (Pilot)	Candidate Experience	Removed the “Application Status,” “Options,” and “Search Jobs” sections, since these reflect existing functionality. Also, removed the second paragraph from the top of the page (“From the new inbox page, candidates can also access the search jobs page to quickly find other open positions. The candidate's application status also displays, providing up to date information on where they are in the application process.”), since this is existing functionality.
Candidate Messaging & SMS (Pilot)	Candidate Messaging & SMS (Pilot) – Overview	Clarified that the name of the new permission is “Candidate Message: View and Send Messages,” and not “View and Send Messages.”
Enhance the Manage Candidates Applicant Carousel	Enhance the Manage Candidates Applicant Carousel – Overview	Changed the “Considerations” section to indicate that prescreening question scores and correct/incorrect indicator are visible on the Manage Candidates page but will not be available at the start of UAT.

3 April Patch Release Functionality

What's New for the 03 April 2020 Patch Release

The following is released along with the 03 April 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Core	Kronos Workforce Ready Core Data Inbound Integration - Support for Custom Fields	Custom user and organizational unit (OU) fields are now supported in the Kronos Workforce Ready Core Data Inbound Integration.
Core	Reporting 2.0 - Report Viewer Filters Section Expanded by Default	With this enhancement, the Filters section at the top of the **report viewer** page is expanded by default.
Performance	Reporting Fields - Check-Ins	With this enhancement: ○ 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	Learning Details Redesign (Early Adopter) – Strikethrough Logic for Pricing	With this enhancement, 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.
Recruiting	Simplified Recruiter Experience in	With this enhancement, the option to request reference letters is now available from Manage Candidates, both

MODULE	FEATURE	DESCRIPTION
	Manage Candidates - Request Reference Letters	on the Manage Candidates page and from the applicant carousel.

Core

Kronos Workforce Ready Core Data Inbound Integration - Support for Custom Fields

Custom user and organizational unit (OU) fields are now supported in the Kronos Workforce Ready Core Data Inbound Integration.

The Kronos Workforce Ready Core Data Inbound Integration was released with the February 2020 release. *See Kronos Workforce Ready Core Data Inbound Integration.*

Implementation

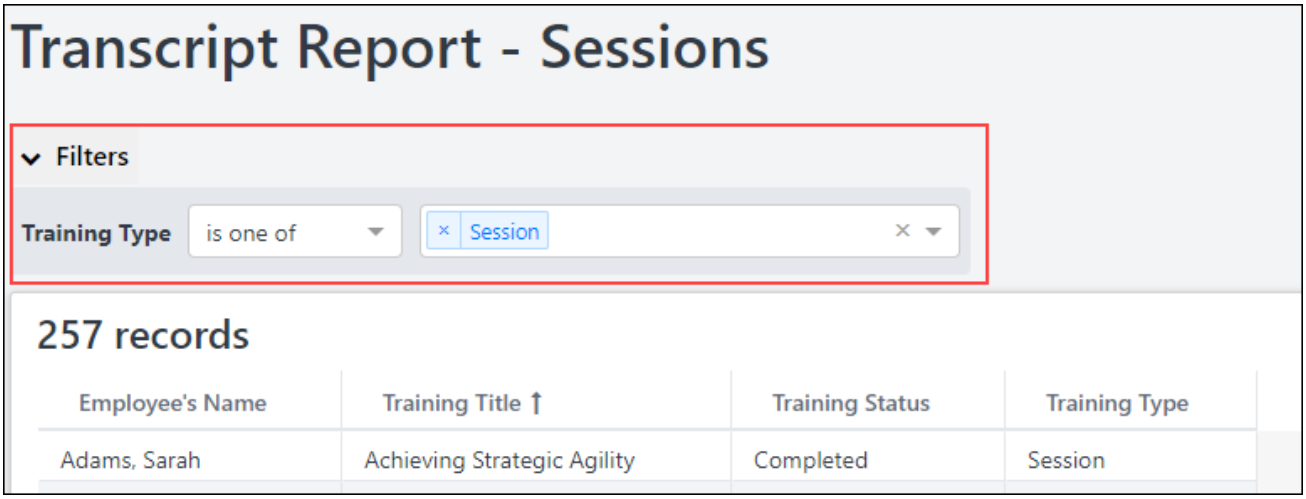
This integration is available for self-Activation via the Kronos Workforce Ready Core Data Inbound Integration tile in Edge Marketplace. This integration is for organizations that use Kronos Workforce Ready as a source of HR data. Please refer to the Kronos Workforce Ready Core Data Inbound Integration 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

Reporting 2.0 - Report Viewer Filters Section Expanded by Default

With this enhancement, the Filters section at the top of the **report viewer** page is expanded by default.



Implementation

The Reporting 2.0 (Early Adopter) functionality is self-enabled. All clients can opt-in in their Stage, Pilot, and Production portals. *See Enable Reporting 2.0.*

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

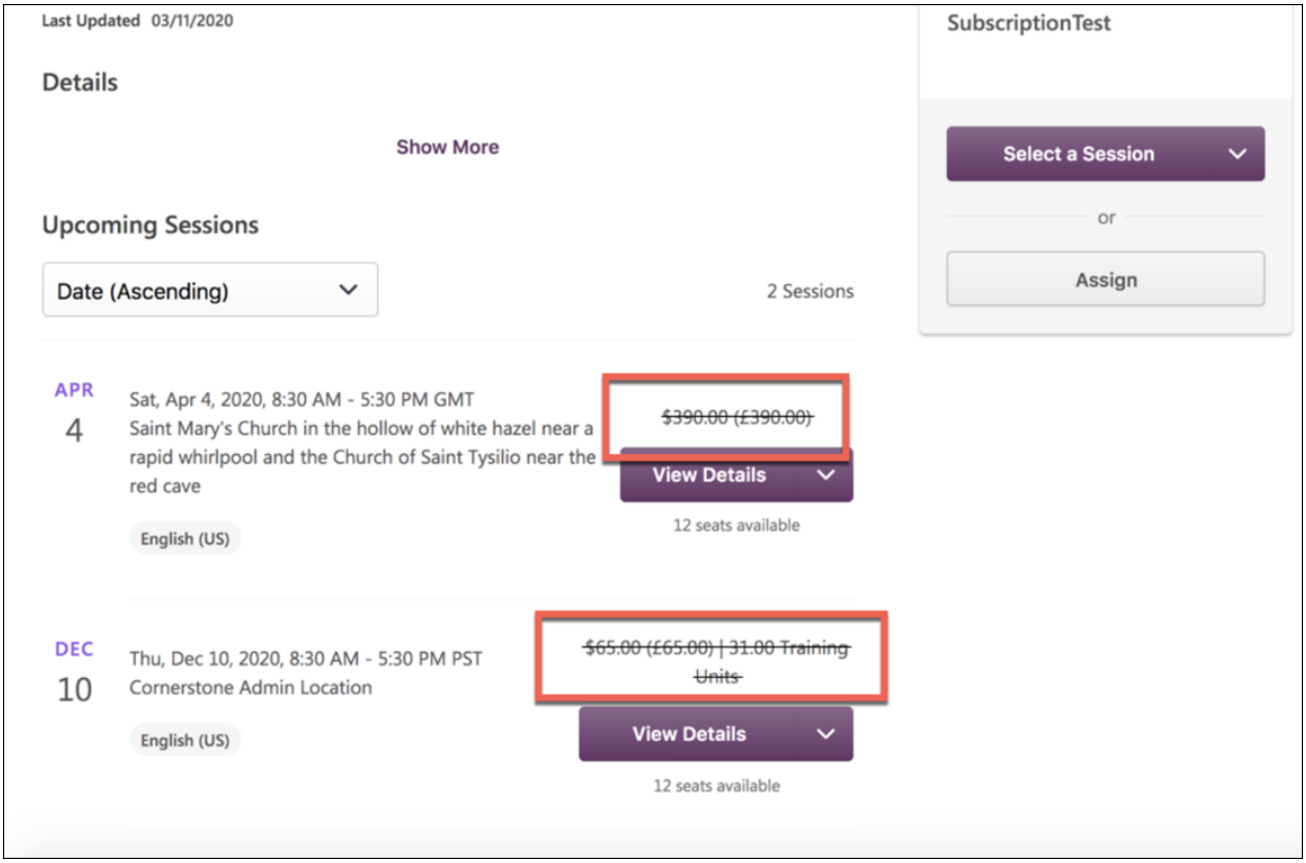
Permissions

For the full list of permissions and their relationships, **see the permissions spreadsheet in Online Help**.

Learning

Learning Details Redesign (Early Adopter) – Strikethrough Logic for Pricing

With this enhancement, 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.



Implementation

This functionality is automatically available in all portals using the Learning Module and the new Learning Details page.

Performance

Reporting Fields - Check-Ins

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.

Recruiting

Simplified Recruiter Experience in Manage Candidates - Request Reference Letters

Simplified Recruiter Experience in Manage Candidates - Request Reference Letters - Overview

Prior to this release, the features in this enhancement were not available on Manage Candidates. This meant recruiters had to navigate away from Manage Candidates in order to use these features during the hiring process.

With this enhancement, the option to request reference letters is now available from Manage Candidates, both on the Manage Candidates page and from the applicant carousel.

Implementation

As part of the 3 April 2020 patch release, these features are enabled in Stage for all portals using Recruiting.

These features will be available in Production/Pilot portals as part of the May '20 release.

Considerations

- **E-Signature Forms** - Forms that include an e-signature option cannot be used for requesting reference letters via Manage Candidates.
- **Reassigning Reference Letter Requests** - 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.

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

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	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. Use Case: Use this trigger to notify recipients that the referrer has submitted the reference letter.	Recruiting
Reference Letter Request (to external references)	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. 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. ***Note:*** *The link to the reference letter form is only valid for*	Recruiting

	the current applicant and cannot be reused or resubmitted for a different applicant. 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. 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. 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.	
Request References	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. Use Case: Use this trigger to notify applicants that they have been assigned the Reference Letter Request task.	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.

20 March Patch Release Functionality

What's New for the 20 March 2020 Patch Release

The following is released along with the 20 March 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	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 are available for iOS with the March 20 2020 patch. These enhancements were made available for Android with the March 6 2020 patch.

Learning

CSOD Learn - Device Reg

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

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

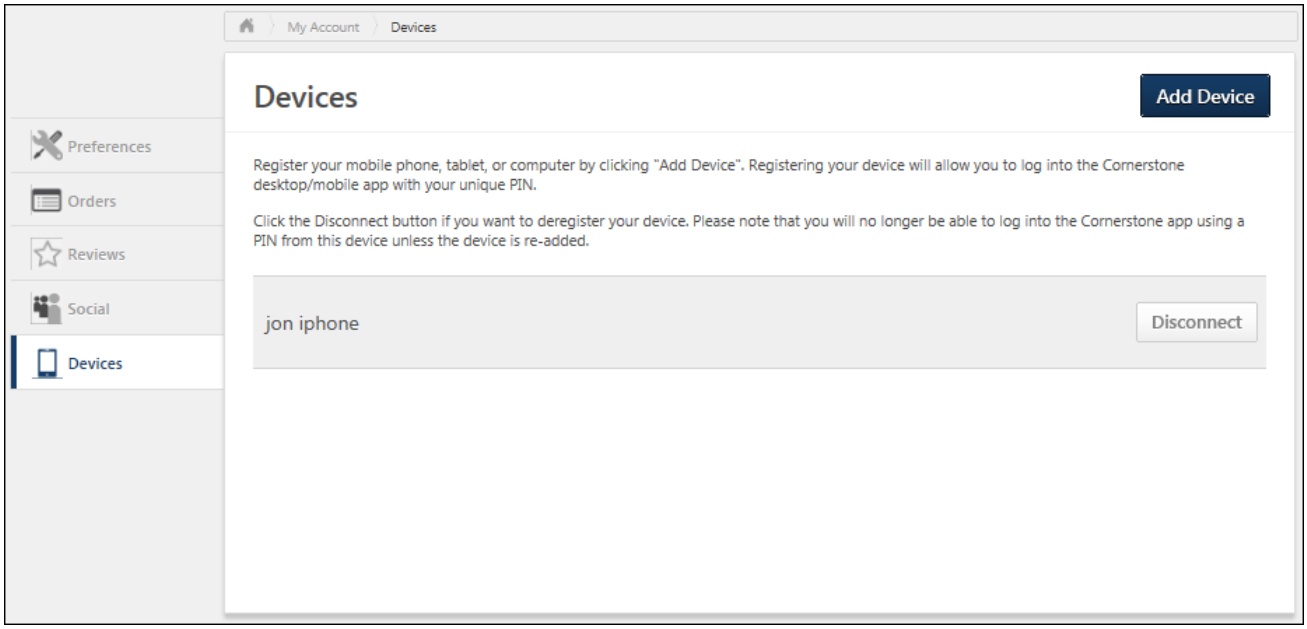
Register Device

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.

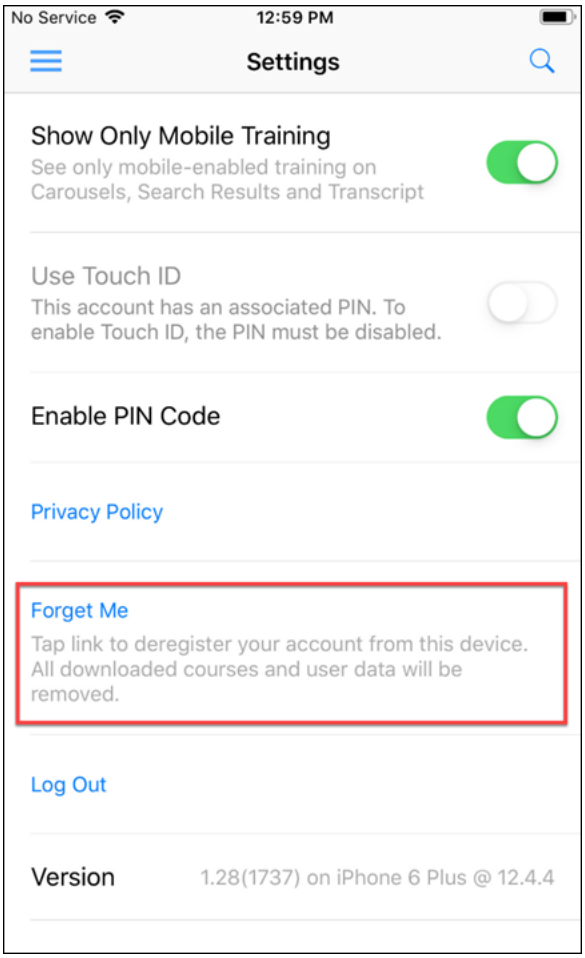
8. After you have configured a pin, you will be logged into the app. Continue to use the PIN you configured for future logins.

- For information about configuring a PIN:*See* **Learn App - Configure PIN** on page 193 *for additional information.*

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



6 March Patch Release Functionality

What's New for the 6 March 2020 Patch Release

The following is released along with the 6 March 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Core	Banner Core Data Inbound Integration (Early Adopter)	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 is currently an Early Adopter integration.
Core	Edge Import - LMS Loads	Edge Import is available to organizations as an Early Adopter for loading Learning Management System (LMS) historical data.
Core	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. ***Note:*** *Support for custom fields is targeted for an upcoming patch.*
Core	Language Pack Updates	Please visit the **March 6, 2020 Patch Localization Update** posting in the Success Center for the latest translation updates for Check-Ins, as well as other updates related to Arabic, French France, German, Portuguese Brazil, Bahasa Malaysia, and Hebrew.
Core	Reporting 2.0 (Early Adopter) Enhancements	The following new features and updates are included in this release for Reporting 2.0: ○ All custom reports can now be migrated to Reporting 2.0. ○ Performance Review and Development Plan exception reporting is now available. ○ The Archived from Transcript? field is added.

MODULE	FEATURE	DESCRIPTION
		○ The Past Due Aging field is now available as a filter. ○ Blank rows will no longer appear when running/exporting the report. ○ Time to load the report builder page is reduced. ○ New certification fields are available.
Cornerstone HR	Point-In-Time Headcount - New Fields	Ten of the most commonly used standard fields have been added to the Point-In-Time Headcount report: ○ Original Hire Date ○ Deactivation Date ○ Allow Reconciliation ○ Last Hire Date ○ Required (Training) Approvals ○ Is Rehired Employee ○ User Status ○ Time Zone ○ Activation Date ○ Display Language
Learning	Cornerstone Learn App Update	With the March 6 2020 patch, users of the Cornerstone Learn app will be forced to upgrade to the latest version of the app the next time they launch it. For users who have opted to allow the app to update automatically, this enhancement will not be a change from existing behavior. This enhancement is a change for users who manually update the app.
Learning	Cornerstone Learn - Device Registration (Android) and "Forget Me" Link	With this enhancement, 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 deregister their account from their mobile device. These enhancements are available for Android with the March 6 2020 patch. These

MODULE	FEATURE	DESCRIPTION
		enhancements will be available for iOS with the March 20 2020 patch.
Learning	Learner Home - Subjects Banner Toggle	With this enhancement, 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.
Learning	Learning Details Redesign (Early Adopter) - Additional Enhancements	With this enhancement, additional certification fields are available. These new fields are available in Reporting 2.0. These fields are NOT available in Custom Reporting.
Learning	Machine Learning Preferences Enablement for CDG4 Clients	With this enhancement, 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.
Learning/Reporting	Reporting - Certification Fields	With this enhancement, additional certification fields are available. These new fields are available in Reporting 2.0. These fields are NOT available in Custom Reporting.
Recruiting	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

MODULE	FEATURE	DESCRIPTION
		candidate's job fit and future performance, rather than only focusing on the skills a candidate has already attained based on their resume. This integration is available on 9 March 2020.
Recruiting	Simplified Recruiter Experience in Manage Candidates - Additional Enhancements	With this enhancement, you can now assign forms and invite candidates to interview events from Manage Candidates.
Recruiting	Simplified Recruiter Experience in Manage Candidates - Assign Integrations	This functionality was released to Stage portals as part of the 21 February 2020 patch release. As part of the 6 March 2020 patch release, this functionality is now available in Production and Pilot portals. There are no updates or changes to the functionality as part of this release.

Core

Banner Core Data Inbound Integration (Early Adopter)

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 is currently an Early Adopter integration.

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

Edge Import - LMS Loads

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.

Organizations are able to control their own project timelines by validating and loading LMS historical data directly to their portals using Edge Import.

Note: *LMS data feeds are not supported with the February '20 release.*

The following LMS data types can be imported using Edge Import:

- Curriculum
- Curriculum Transcript
- External Training
- Facility
- ILT Events
- ILT Session Parts
- ILT Sessions
- ILT Transcript
- Instructor
- LO (Learning Object) Equivalencies
- Material
- Material Transcript
- Online Course
- Online Course Transcript
- Provider
- Question Category
- Questions
- Subject
- Test
- Test Mapping
- Test Transcript
- Transcript Custom Fields
- Video
- Video Transcript

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. 2. Use Delta files, instead of complete loads.

ENVIRONMENT	MAXIMUM FILE SIZE	BEST PRACTICES TO REDUCE IMPACT
		3. Break files that are larger than 10k rows to multiple files that are 10k rows or fewer.
Stage	100k rows, 150 columns	1. Use Delta files, instead of complete loads. 2. Break files that are larger than 100k rows to multiple files that are 100k rows or fewer.
Production	100k rows, 150 columns	1. Use Delta files, instead of complete loads. 2. Break files that are larger than 100k rows to multiple files that are 100k rows or fewer.

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, OU, and User data loads:

- Organizations that are currently using Data Load Wizard can enable the Edge Import data loads and feeds in the following way:
  - Between February and March 2020 - Contact Global Product Support to enable this functionality.
  - Following March 2020 - This functionality can be enabled in Pilot and Stage portals via Edge Marketplace. This only enables the loads and feeds in Edge Marketplace. Once the organization has tested the functionality, they may enable the functionality in their Production portals following the February release by contacting their Client Success Manager.
- Organizations that are not currently using Data Load Wizard can enable the Edge Import data loads and feeds in all environments via 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 new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

The following existing permissions apply 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
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
Enable/Disable Feeds	Grants ability to enable or disable a data feed in Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Manual Run Feed	Enables administrator to manually initiate a data feed processing. This permission cannot be constrained. This is an administrator permission.	Edge Import
Set up Feed	Enables administrator to access the Feed Settings page where the administrator can create and update feeds and schedule feeds. This permission does not grant the ability to activate feeds or manually run feeds. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, all new Edge Import permissions are automatically granted to the default System Administrator role. Administrators must grant these permissions to other roles, if necessary.

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.
Note: *Support for custom fields is targeted for an upcoming 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. 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 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

Language Pack Updates

Please visit the **March 6, 2020 Patch Localization Update** posting in the Success Center for the latest translation updates for Check-Ins, as well as other updates related to Arabic, French France, German, Portuguese Brazil, Bahasa Malaysia, and Hebrew.

Reporting 2.0 (Early Adopter) Enhancements

The following enhancements are made to Reporting 2.0 as part of this 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.*

Exception Reports - Performance

The following exception reports are now available:

Performance Review - The following fields apply:

- 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

Development Plans - The following fields apply:

- 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.

New Learning Field

The **Archived from Transcript? (Curriculum)** field is now available in Reporting 2.0. This field is used in Curriculum Transcript Reports and indicates whether or not the child learning object (LO) of a curriculum has been moved to the user's archived transcript. The report displays "Yes" if the child LO has been archived and displays "No" if the LO is not archived.

Past Due Aging Filter

The Past Due Aging field can now be added as a filter. This filter lets you report on users who are X number of days past due on training, which is important data for compliance purposes.

This filter is available for Learning reports.

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.

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.

Certification Fields

Additional certification fields are available and were initially announced as part of the February '20 release. *See* **Reporting - Certification Fields** on page 79 *for additional information.*

Implementation

The Reporting 2.0 functionality must be self-enabled. For self-enablement information. All clients can opt-in to Early Adopter in Stage, Pilot, and Production portals. *See* **Enable Reporting 2.0** on page 154 *for additional information.*

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

Permissions

For the full list of existing permissions and their relationships, **see the permissions spreadsheet in Online Help**.

Cornerstone HR

Point-In-Time Headcount - New Fields

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

Learning

Reporting - Certification Fields

With the March 6 2020 patch, additional certification fields were made available. These 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. ***Note:*** *This field does not apply to Past Due and On Hold flags, as flags are separate from certification statuses.*	Date	Certification Report
Certification ID	Certification	This field is a unique identifier for a certification.	Text	Certification Report

Cornerstone Learn App Update

With the March 6 2020 patch, users of the Cornerstone Learn app will be forced to upgrade to the latest version of the app the next time they launch it. For users who have opted to allow the app to update automatically, this enhancement will not be a change from existing behavior. This enhancement is a change for users who manually update the app.

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

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

With this enhancement, 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 deregister their account from their mobile device.

These enhancements are available for Android with the March 6 2020 patch. These enhancements will be available for iOS with the March 20 2020 patch.

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

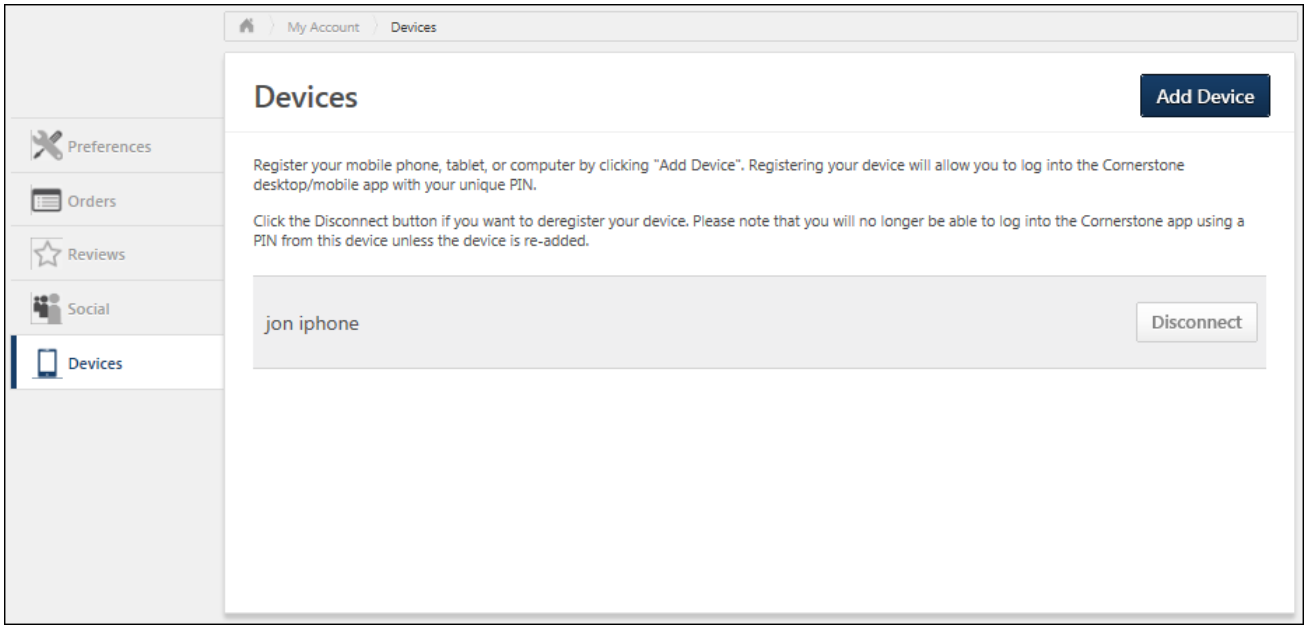
Register Device

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.

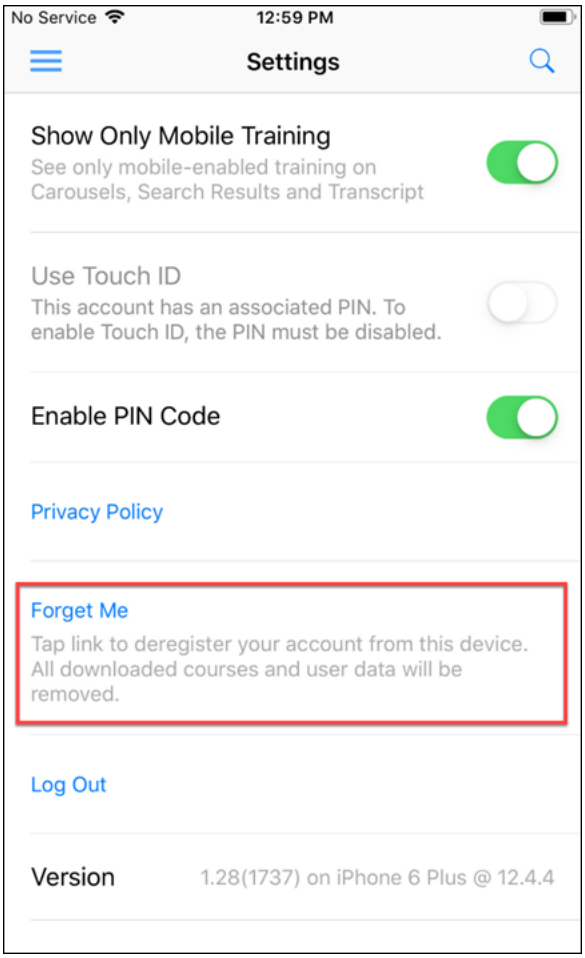
8. After you have configured a pin, you will be logged into the app. Continue to use the PIN you configured for future logins.

- For information about configuring a PIN:*See* **Learn App - Configure PIN** on page 193 *for additional information.*

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



Learner Home - Subjects 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.

With this enhancement, 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.

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 page, where the administrator can configure Learning Search options.	Learning - Administration

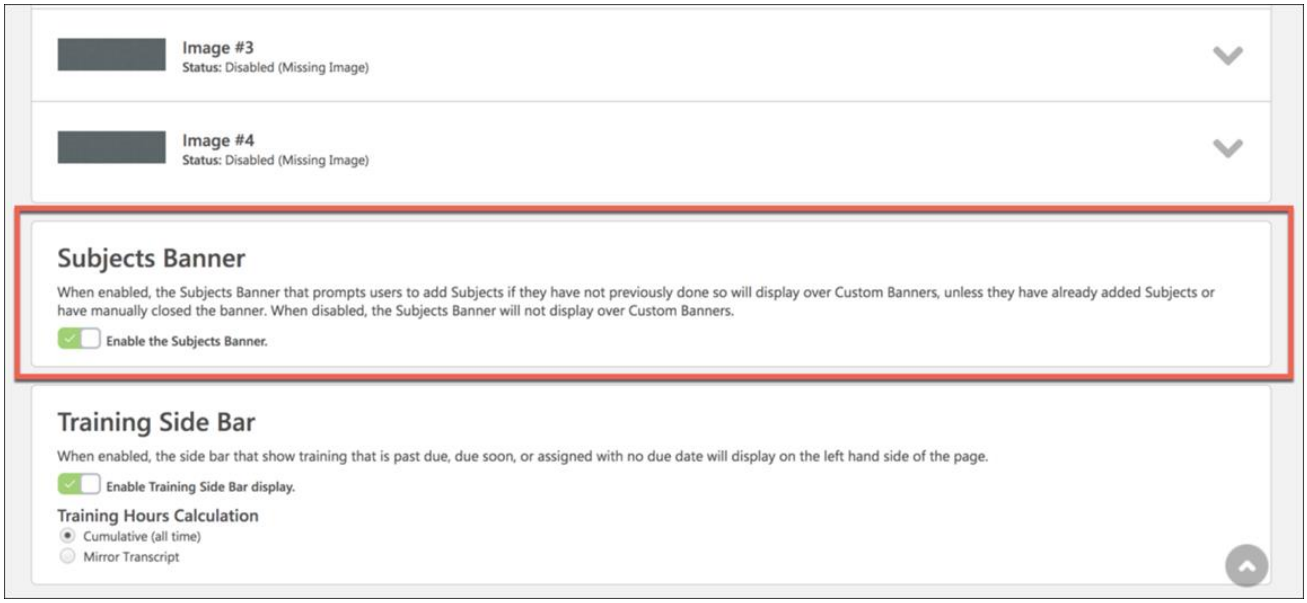
Learner Home Preferences - Subject Banner

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	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 page, where the administrator can configure Learning Search options.	Learning - Administratio n



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.

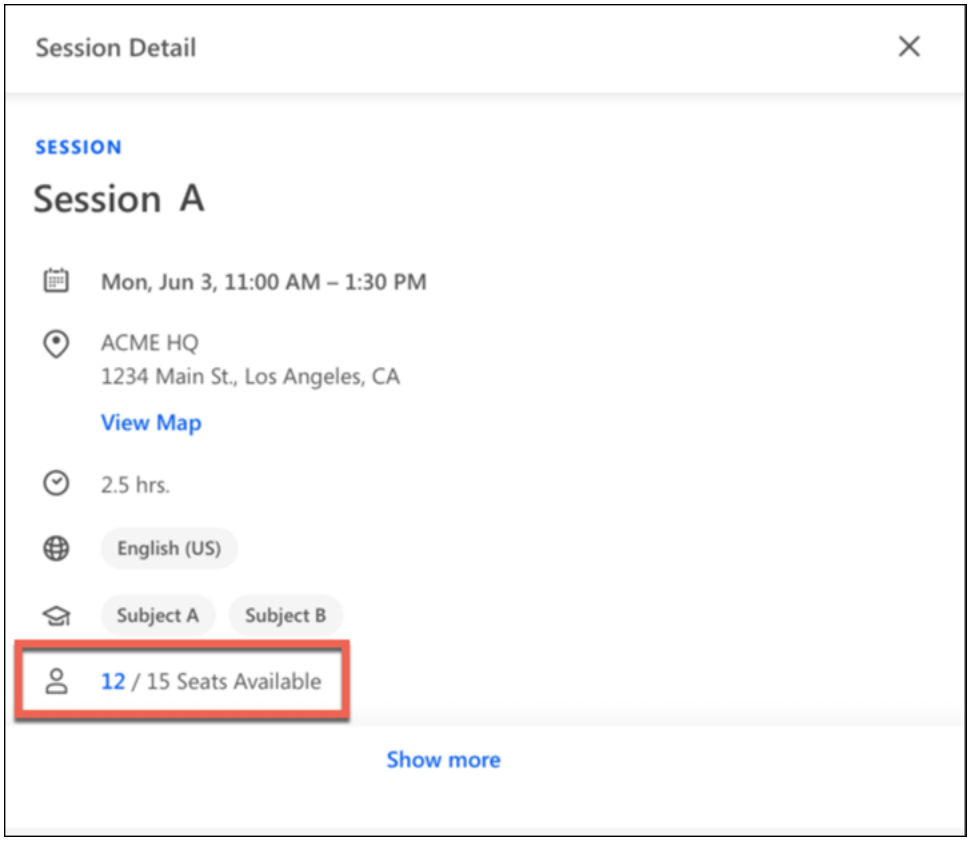
Learning Details Redesign (Early Adopter) - Additional Enhancements

With the March 6 2020 patch, the following event and session features have been added to the Session Details page:

- The session flyout on the Session Details page displays the number of currently registered users and the max available space
- The session flyout on the Session Details page displays the Locator number and year

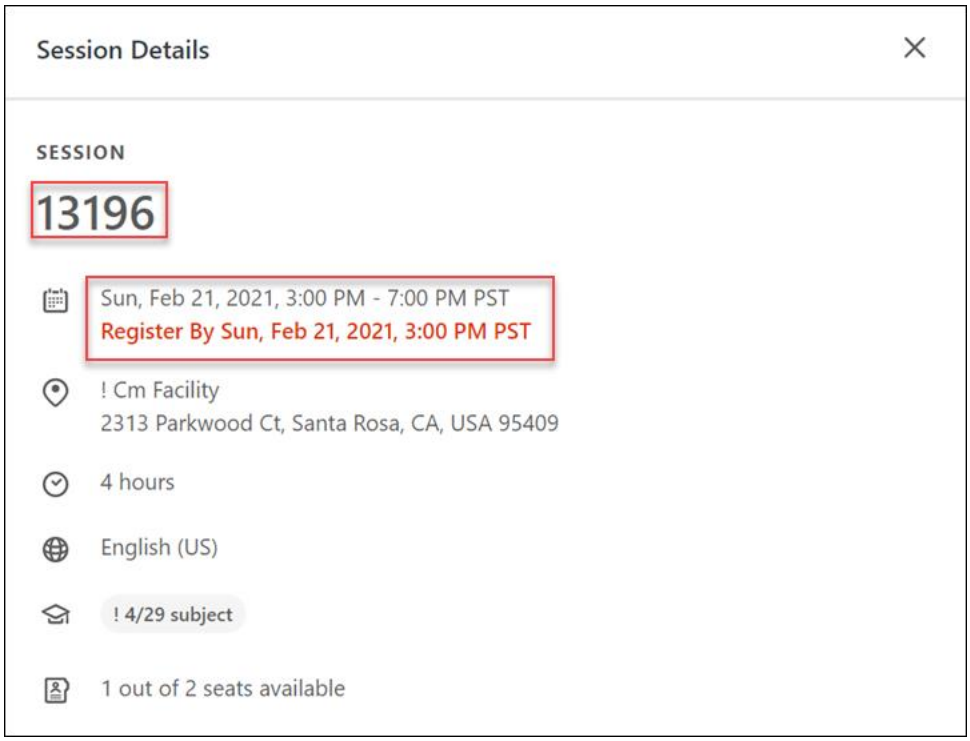
Seats Available

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.



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.


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

Machine Learning Preferences Enablement for CDG4 Clients

Prior to this enhancement, the Machine Learning Preferences page was not available for secure swimlane organizations due to security concerns.

With this enhancement, 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

Recruiting

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 is available on 9 March 2020 for all organizations using the Recruiting suite and that also have an account with the integration vendor. This integration is available via **Edge Marketplace**. 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 - Additional Enhancements

Simplified Recruiter Experience in Manage Candidates - Additional Enhancements Overview

Prior to this release, the features in this enhancement were not available on Manage Candidates. This meant recruiters had to navigate away from Manage Candidates in order to use these features during the hiring process.

With this enhancement, the following features are now available in Stage portals on Manage Candidates:

- **Assign Forms** - Forms can now be assigned to candidates.
- **Invite to Event** - Candidates can now be invited to interview events.

Implementation

As part of the 6 March 2020 patch release, these features are enabled in Stage for all portals using Recruiting.

These features will be available in Production/Pilot portals as part of the May '20 release.

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	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. Use Case: Use this trigger to send notifications that a form has been assigned to an applicant.	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)	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. 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.	Recruiting

To invite candidates to interview events:

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. 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.

As part of the 6 March 2020 patch release, the ability to assign integrations in Manage Candidates is now released to Production and Pilot portals.

For an overview of the features of assigning integrations, see the following topic in Online Help:

- *See* **Simplified Recruiter Experience in Manage Candidates - Assign Integrations** on page 120 *for additional information.*

For detailed information about this functionality, see the following topic in Online Help:

- *See* **Manage Candidates - Assign Integration** on page 125 *for additional information.*

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	Recruiting

	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]."	
Applicants: View Assessment Integration Status	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. 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.	Recruiting
Applicants: View Assessment Integration Status and Details Link	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. 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.	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 Administratio n

21 February Patch Release Functionality

What's New for the 21 February 2020 Patch Release

The following is released along with the 21 February 2020 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	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.
Learning	Learning Assessments - Admin Experience (Open Beta)	With the February 2020 release, an open beta of a reimagined Test Engine is available. The redesigned experience is called Learning Assessments and is available to test in Stage portals only. This beta version of Learning Assessments does not yet have feature parity with the existing Test Engine. The following features are available with Learning Assessments: ○ Assessment Creation (allows administrators to define metadata for the assessment) ○ Assessment Builder (allows administrators to build the assessment structure) ○ Assessment Preview (desktop only) ○ Settings Adjustment ○ Assessment Home (allows administrators to view and manage previously created assessments) This functionality will be available in Stage portals with the Feb 21 2020 patch.
Recruiting	Simplified Recruiter Experience in Manage Candidates - Assign Integrations	With this enhancement, integrations can now be assigned from Manage Candidates. Recruiters can assign integrations to one candidate at a time or assign integrations in bulk. Adding this feature to Manage Candidates improves the recruiter experience

MODULE	FEATURE	DESCRIPTION
		and reduces the need to use multiple pages within Recruiting to manage your candidates. In addition, background checks can now be assigned in any status from Manage Candidates. Prior to this enhancement, candidates had to be in a specific background check status to assign a background check. For the 21 February 2020 patch release, this functionality is available in Stage portals only. This functionality will be available in Production/Pilot portals as part of the 6 March 2020 patch release.

Learning

Learning Assessments (Beta)

Learning Assessments - Admin Experience (Open Beta) - Overview

With the February 2020 release, an open beta of a reimagined Test Engine is available. The redesigned experience is called Learning Assessments and is available to test in Stage portals only. This beta version of Learning Assessments does not yet have feature parity with the existing Test Engine. The following features are available with Learning Assessments:

- Assessment Creation (allows administrators to define metadata for the assessment)
- Assessment Builder (allows administrators to build the assessment structure)
- Assessment Preview (desktop only)
- Settings Adjustment
- Assessment Home (allows administrators to view and manage previously created assessments)

This functionality will be available in Stage portals with the Feb 21 2020 patch.

Exclusions

The following features that are available via the existing Test Engine are NOT currently supported by the Learning Assessments open beta:

- All question types except Multiple Choice Single Answer
- Adjusting assessment score threshold (default to 80%)
- Assigning an assessment
- Branching functionality
- Remedial training
- Versioning
- Localization
- HTML and rich text
- Support for images and other media
- Migration tools (questions and assessments)
- Bulk uploading of questions
- Question bank
- Mobile preview
- Searching assessments by multiple languages

Implementation

Learning Assessments functionality is in an open beta status, and is only available in Stage portals. Learning Assessments are automatically available in Stage portals with the Test Engine enabled, to administrators with permission to manage the Test Engine.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Test Engine - Manage	Grants ability to create and edit/manage tests via the Test Engine. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administratio n

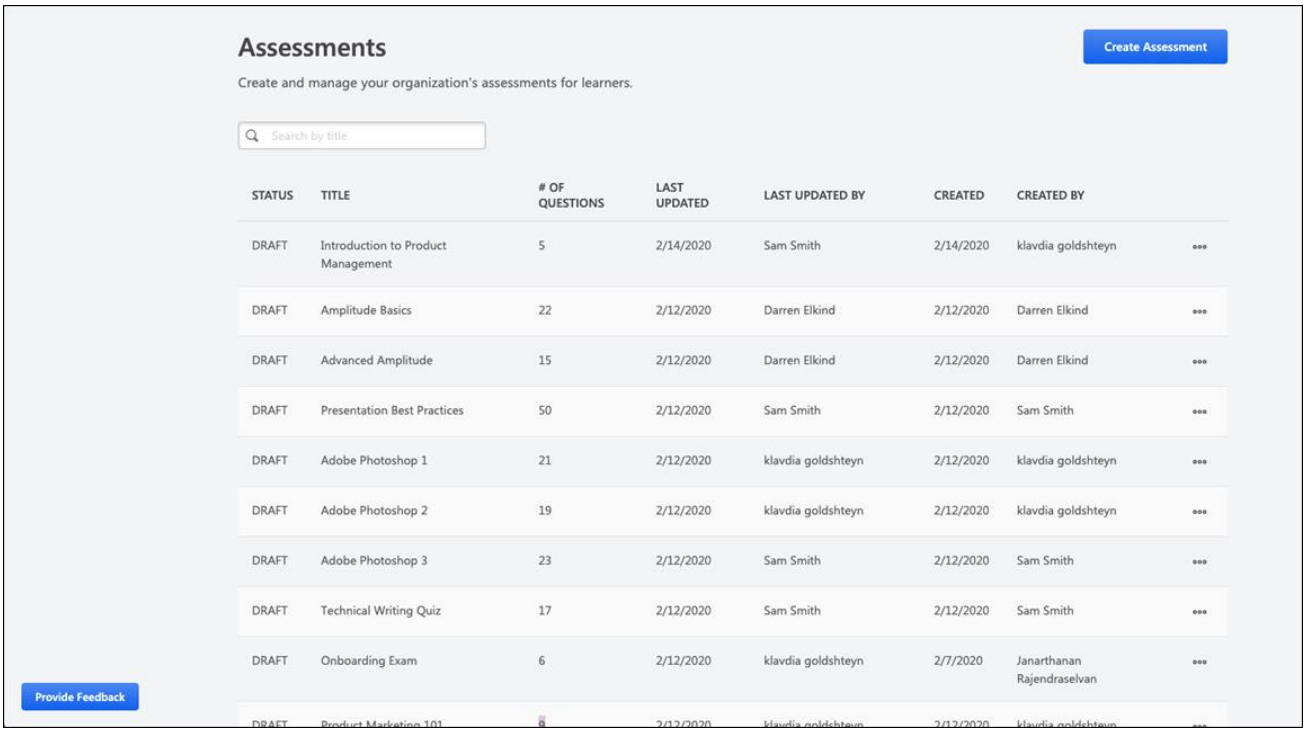
Assessments Home

On the Assessments Home page, administrators can view and manage their organization's assessments. Administrators can also begin creating a new assessment from this page.

To access the Assessments Home page, go to: ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Learning Assessments BETA** link.

Permissions

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



The following features and fields are available on the Assessments Home page:

- **Search** - To search for a specific assessment, enter a search term into the Search bar. The page results will update as you type.
- **CREATE ASSESSMENT** - Click the **CREATE ASSESSMENT** to begin creating a new assessment. *See Create Assessments.*
- Assessments Table - The Assessments Table displays the assessments which have been created in your portal
  - **Status** - The Status column displays the current status of the assessment. Currently, assessments can only be in a Draft status.

- **Title** - This field displays the title of the assessment.
- **# of Questions** - This field displays the number of questions contained within the assessment.
- **Last Updated Date** - This field displays the date on which the assessment was last modified by an administrator.
- **Last Updated By** - This fields displays the name of the last user who updated the assessment.
- **Created Date** - This field displays the date on which the assessment was originally created, along with the name of the assessment creator.
- **Created By** - This field displays the name of the user who created the assessment.
- **Options** - Click the **...** button for an assessment to access additional options for managing the assessment. The following options may be available:
    - **Edit Assessment** - Click this option to modify the assessment.
    - **Preview Assessment** - Click this option to preview the assessment from the end user perspective.
    - **Delete** - Click this option to delete the assessment.

Create Assessments

Administrators can begin creating new assessments from the Assessments Home page.

To access the Assessments Home page, go to: ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Learning Assessments BETA** link. Then, click the **CREATE ASSESSMENT** button.

Permissions

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

Create Assessment

*Title

Workplace Culture 2020

22 / 500

Description

Assessment of key values knowledge for new hires

Provide a description for this assessment that informs users about what it will cover.

Instructions

Please complete all questions and submit the test.

Provide instructions for the assessment that will be presented to learners before they begin.

Internal Notes

Enter internal notes

This field is only visible to administrators.

Scoring Options

- (●) Score assessment (80% passing score)
- ( ) Disable scoring

Question Display Format

- (●) Show multiple questions on a page, grouped by sections
- ( ) Show one question per page

Note: These options can be edited later in the "Assessment Details" section of the menu.

Cancel | Create

Assessment Details

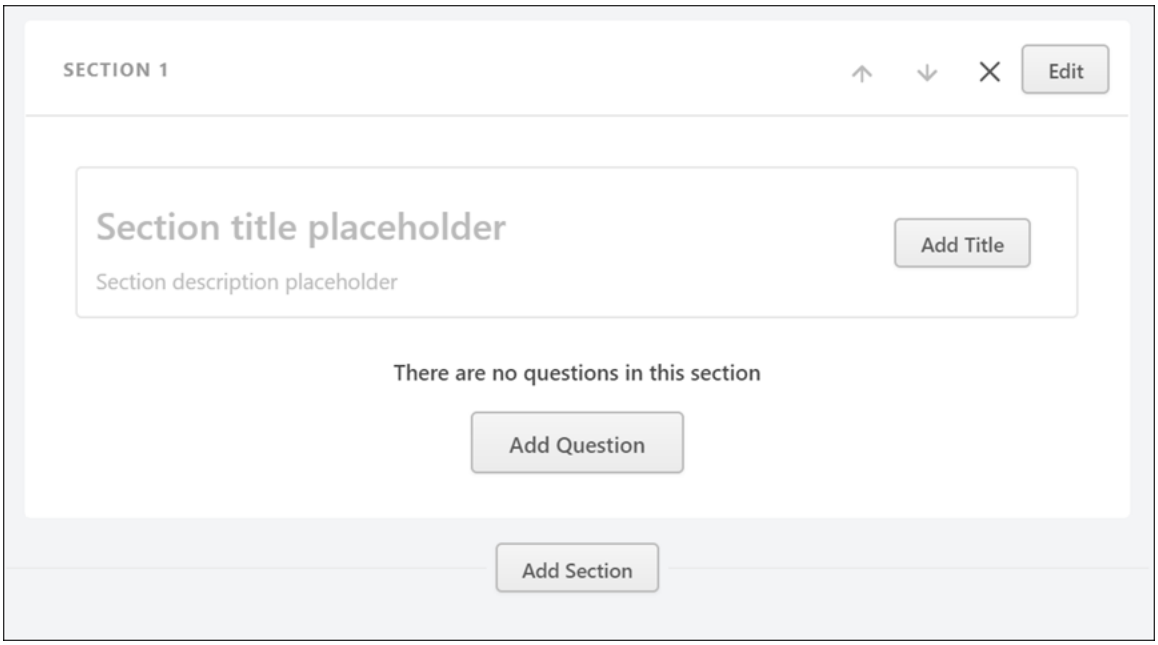
On the Assessment Details step of the assessment creation process, populate the following fields:

- **Assessment Title** - Enter the title of the assessment. This field is limited to 500 characters.
- **Description** - Enter a description of the assessment. This field is user-facing.
- **Instructions** - Enter any instructions for how the user should complete the assessment. The user will see these instructions before beginning the assessment.
- **Internal Notes** - Enter any administrator-facing notes about the assessment. These notes will not be visible to users.
- **Score Assessment** - Select an option for how the assessment will be scored. The following options are available:
  - **Yes, require 80%+ score to pass** - Select this option to require users to receive a score of 80% or higher in order to pass the assessment. ***Note:*** *This selection is not currently reflected in Preview mode.*
  - **No, disable scoring** - Select this option to disable scoring for the assessment. Users will not be required to obtain a certain score in order to pass.
- **Choose an Assessment Format** - Select an option for how the assessment will be formatted:
  - **Show multiple questions on pages** - Select this option to allow multiple assessment questions to appear on one page of the assessment for users. Questions will be grouped by section, and each section displays on a new page.
  - **Show one question at a time** - Select this option to allow only one question to display to users on each page of the assessment. ***Note:*** *This selection is not currently reflected in Preview mode.*

After configuring the fields on the Create Assessments page, click the **CREATE** button to continue creating the assessment, or click the **CANCEL** button to discard your work without creating a new assessment.

Assessment Builder

On the Assessment Builder step of the assessment creation process, build the structure of the assessment, including sections and questions. One section is added to the assessment by default.



Configure Section

To configure the first assessment section:

1. Click the **ADD TITLE** button. A flyout opens.
2. In the flyout, populate the following fields:
   A. **Section Title** - Enter a name for the section. The title can be up to 500 characters.
   B. **Section Description** - Enter a description of the section. The description can be up to 1000 characters.
3. Click the **SAVE** button to save your section configurations. If needed, you can click the **CANCEL** button to discard the changes.

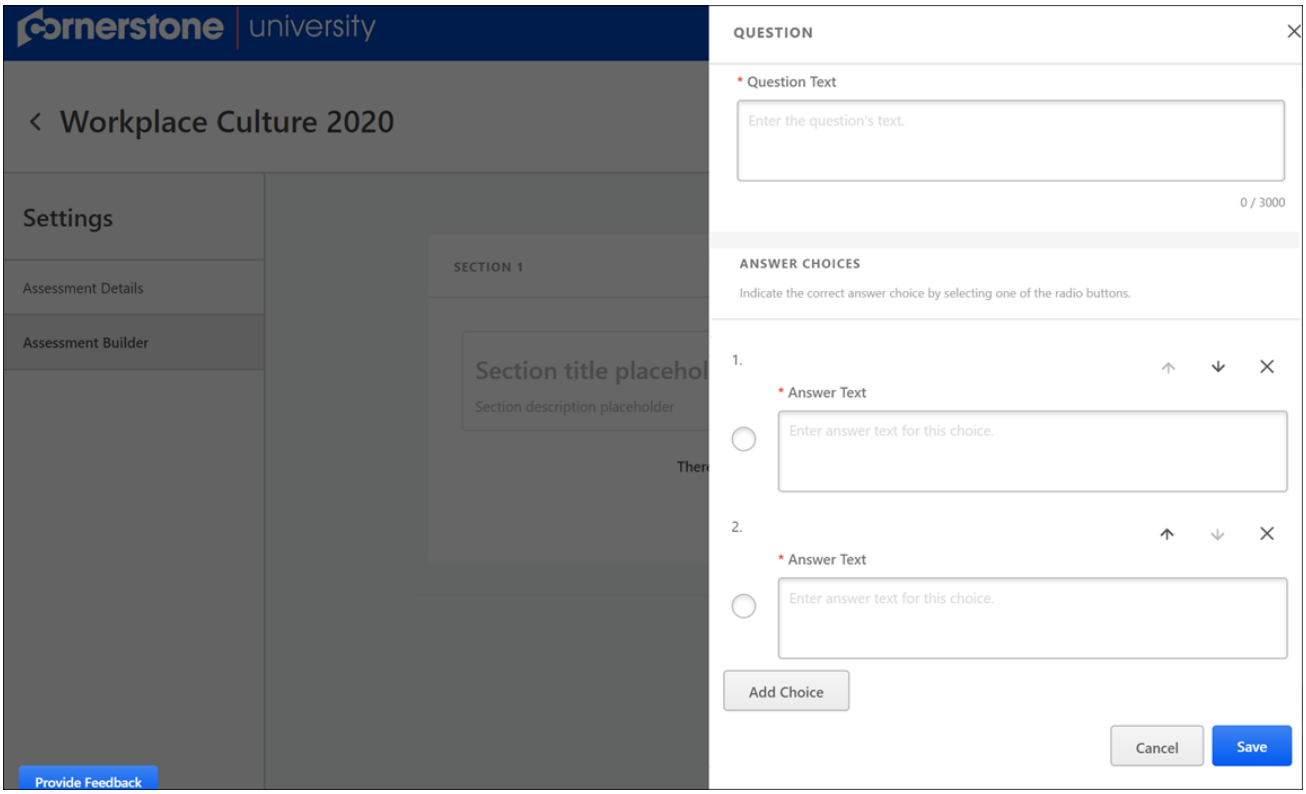
To add additional sections to the assessment structure, click the **ADD SECTION** button at the bottom of the page and complete the above steps. You can also hover between two existing sections and add new sections via the hover menu.

Add Question

To add a question within the section:

1. Click the **ADD QUESTION** button inside the section. A flyout opens.
2. In the flyout, populate the **Question** field with the question text. With the beta version of this functionality, only single-answer multiple choice questions can be created.
3. Next, configure question answer choices. Two answer items are added by default, and more answers can be added if needed. Each choice has the following configuration options:
   A. **Mark if Correct** - Select this radio button or checkbox if the choice is a correct answer to the question. Only one choice may be marked correct.
   B. **Answer Text** - Enter the text of the answer choice in this field.

   C. **Move Up/Move Down Arrows** - To move a choice up or down in the order, use the move up/move down arrows that display in the upper right of each choice tile.
   D. **X** - Click the X icon to delete a choice from the question.
4. Add as many choices as necessary by continuing to click the **ADD CHOICE** button at the bottom of the flyout.
5. Click the **SAVE** button to save your question and add it to the assessment and continue adding as many questions to the assessment as needed by clicking the **ADD QUESTION** button within the section again.



Builder Options

The administrator can manipulate the structure of the assessment after sections and questions have been added. The following configuration options are available for the assessment structure:

Section Options

For each assessment section, the following configuration options are available:

- **Move Up/Move Down Arrows** - To move a section up or down in the order, use the move up/move down arrows that display next to the section name.
- **Delete Section** - Click the X icon to delete a choice from the question.
- **EDIT** - Click the **EDIT** button to edit the name of the section or the section description.

Question Options

For each question, the following configuration options are available:

1. **Move Up/Move Down Arrows** - To move a question up or down in the order, use the move up/move down arrows that display in the right of each question.
2. **Delete Question** - Click the X icon to delete a question from the assessment structure.
3. **EDIT** - Click the **EDIT** button to make changes to the question.

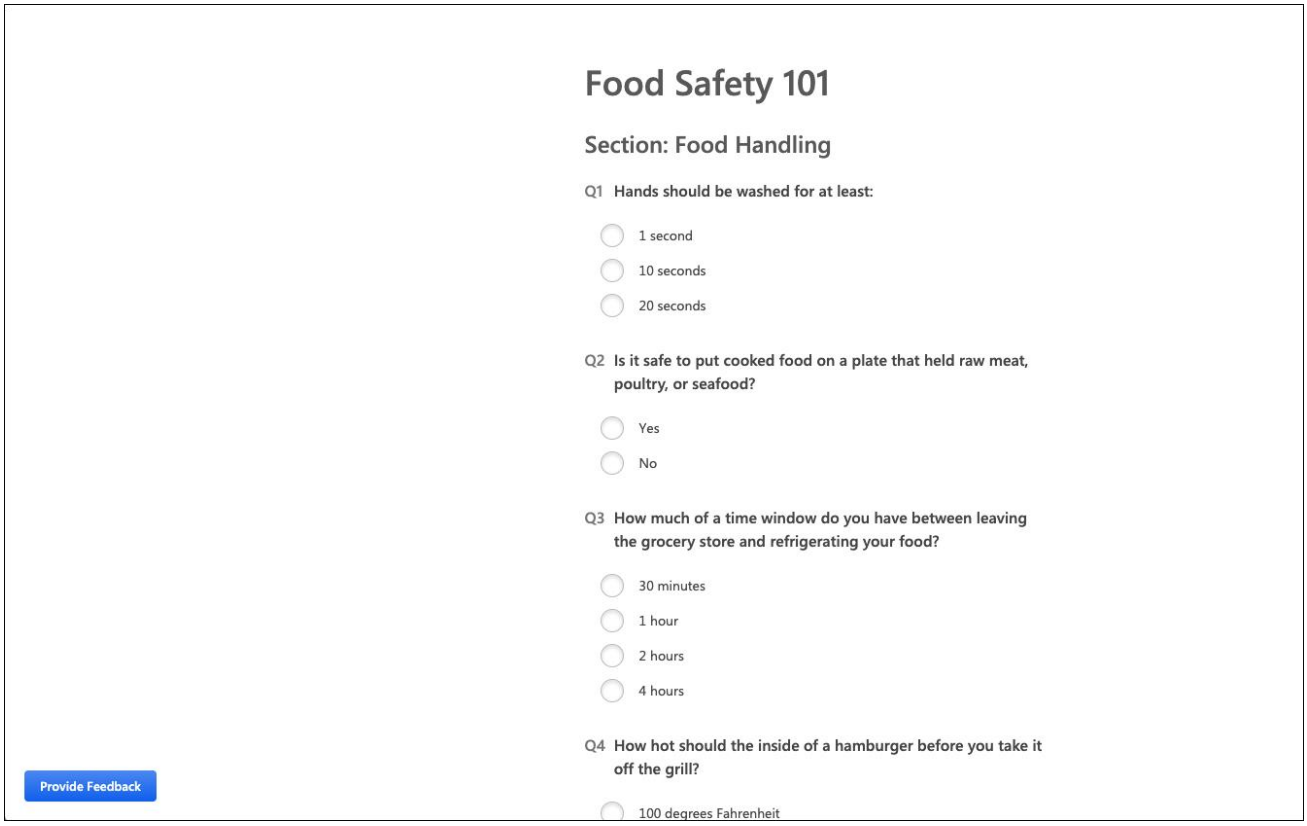
Save as Draft

After you are finished configuring the assessment's details and structure, click the **SAVE** button. The assessment will be saved as a draft, and the draft can be managed from the Assessments Home page.

Assessments - Desktop Preview

Assessment creators can preview how the assessment will display to desktop device users. The preview displays the assessment title and the sections and questions added by the creator. To progress to the next assessment page, click the **CONTINUE** button. The preview opens in a separate tab.

Note: *Mobile preview is not available for the beta version of Assessments.*



CSOD Learn - Training Image

Recruiting

Simplified Recruiter Experience in Manage Candidates - Assign Integrations

Simplified Recruiter Experience in Manage Candidates - Assign Integrations

Prior to this enhancement, integrations could only be assigned outside the application by using the Assign Integrations feature Manage Applicants.

With this enhancement, integrations can now be assigned from Manage Candidates. Recruiters can assign integrations to one candidate at a time or assign integrations in bulk. Adding this feature to Manage Candidates improves the recruiter experience and reduces the need to use multiple pages within Recruiting to manage your candidates.

In addition, background checks can now be assigned in any status. Prior to this enhancement, candidates had to be in a specific background check status to assign a background check. ***Note:*** *This does not apply to assigning background checks outside of Manage Candidates.*

Implementation

As part of the 21 February 2020 patch release, these features are enabled in Stage for all portals using Recruiting.

These features will be available in Production/Pilot portals as part of the 6 March 2020 patch release.

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	Recruiting

	Profile page. Once the background check is assigned, the page will display "Assigned - [Date Assigned]."	
Applicants: View Assessment Integration Status	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. 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.	Recruiting
Applicants: View Assessment Integration Status and Details Link	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. 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.	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
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 Administratio n

Manage Candidates - Assign Integration

The Assign Integration feature is available from the **More** drop-down on Manage Candidates. Integrations can be assigned to one candidate at a time or to multiple candidates at once.

Permissions

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	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. 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.	Recruiting

Cornerstone Release Notes February 2020: Release Notes for February 2020

Applicants: View Assessment Integration Status and Details Link	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. 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.	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

Emails

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Assign Integration Assessment	This email is triggered when an Edge integration assessment is assigned to an applicant, such as a WOTC assessment. This email can be configured as a notification or a reminder, and it can be sent to External Applicant, Internal Applicant, OU Approver, Hiring Manager, OU Approver, or a specific user. ***Note:*** *The APPLICANT.INTEGRATION.ASSESSMENT.LINK tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.* ***Note about Auto-Assignment of Pre-Employment Verifications:*** *This email also applies to auto-assignment of pre-employment verifications, via the Automated Candidate Progression (Early Adopter)*	Recruiting

	*functionality. For more information, see **Feature Activation Preferences**.*	

Assign Integration from Manage Candidates Page

To assign an integration:

1. Navigate to RECRUIT > MANAGE CANDIDATES.
2. Check the box to the left of the candidate name.
3. Select **Assign Integrations** from the **More** drop-down. This opens the Integrations flyout. Each candidate's name appears in the Candidates section.
4. Select an integration from the drop-down in the Provider section.
5. Select the package, which is available if you have an integration that has more than one type of package. For example, your integration provider may have a background check, drug check, etc.
6. Click **Submit**.

Submitting the integration assignment triggers the Assign Integration Assessment email notification, if enabled and active in **Email Administration**. This email lets the candidate know they have been assigned the integration.

View Integration Results

Integration results are available from Manage Candidates. You can configure the integration columns to appear by using the Customize Columns feature. *See Manage Candidates Page (Early Adopter).*

The results include the assignment status, as well as a link to view the results.

Core/General

API Authentication: OAuth 2.0 - Granular Scopes

API Authentication: OAuth 2.0 - Granular Scopes

With the August 2019 release, OAuth 2.0 was made generally available. OAuth 2.0 is an industry-standard authentication and authorization protocol for APIs. Using this protocol reduces the time and effort needed by external developers to integrate with the Cornerstone system.

With this enhancement, the ability to select granular scopes is now available, allowing organizations to control the methods and endpoints an application can access through Cornerstone's APIs using the OAuth 2.0 API credentials. A "scope" is a mechanism in OAuth 2.0 which is used to limit an external application's access.

This means that clients can now specify applications' access to individual calls. For example, an organization can specify an application's access to GET /services/api/Recruiting/JobApplicant by choosing the get_jobApplicant scope.

This enhancement was made available in Stage on Jan 30th. This enhancement will be available with the Feb 7th release.

Implementation

This functionality is available to any organization that has purchased Cornerstone APIs or the Reporting API. A purchase inquiry for Cornerstone APIs or the Reporting API can be submitted through the Edge Marketplace.

To access Cornerstone APIs or the Reporting API in the Edge Marketplace, go to: ADMIN > TOOLS > EDGE and click the **Marketplace** link. Search for and click the Cornerstone API tile. Click the Setup tab for setup instructions for the API.

Additional information about scopes will be made available in the API Explorer: **https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/**

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge APIs - Manage	Grants ability to manage Edge APIs on the API Management page.	Edge

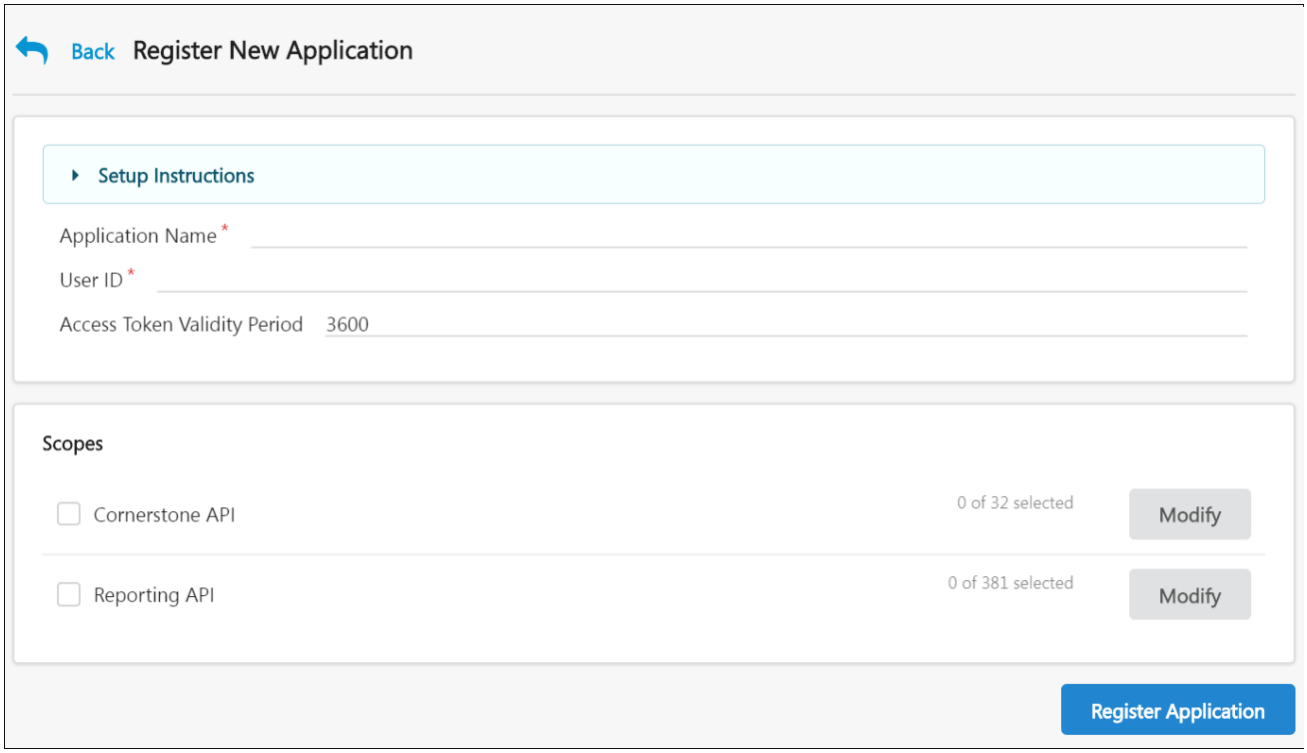
API Management - Scopes

The Scopes for an API can be added when registering a new OAuth 2.0 application from the API Management page in Edge.

To access the API Management page, go to: ADMIN > TOOLS > EDGE and click the **API Management** link. Click the Manage OAuth 2.0 Applications tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge APIs - Manage	Grants ability to manage Edge APIs on the API Management page.	Edge



Register New Application

Scopes can be configured during the application registration process. To register an application:

1. Click the **REGISTER NEW APPLICATION** button.
2. Populate the fields on the Register New Application page, including the **Application Name**, **Username**, and a validity period, if applicable.
   - Each registered application must be associated with an existing user account, which functions as a service account. This user account is bound to the application and to the client ID and secret.

- The validity period defines the time period, in seconds, for which an access token is issued. This field is optional. If no value is entered, access tokens will be assigned a default validity period of one hour. The maximum value that can be entered in this field is 86,400 seconds (one day). The minimum value is 300 seconds.

3. Configure the application's scopes. The Scopes section contains a list of endpoints and operations to which the application needs access. To select scopes for an API, select the checkbox next to the API. To modify the scopes for an API, click the **MODIFY** button next to the API and select or deselect scopes. The external application will not be able to access an endpoint or operation if it is not selected. Select any necessary scopes and click **SAVE**.
4. Click the **REGISTER APPLICATION** button.
5. Copy the client ID and secret generated by Cornerstone to use when building your API-based integration. Be sure to save this information for your use, as you will only be shown the secret once.

- For more information about managing APIs: *See API Management.*
- For more information about specific APIs, go to the API Explorer in Edge: **https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/**

Banner Core Data Inbound Integration (Early Adopter)

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 is currently an Early Adopter integration.

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

Cornerstone Mobile App Deprecation - April 2020

Cornerstone has two mobile application offerings in existence today:

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

In an effort to provide a more modern mobile experience, the Cornerstone Mobile app is scheduled for deprecation. The Cornerstone Mobile app will be deprecated and removed from the Apple App and Google Play stores on April 30, 2020.

Prior to the deprecation, 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. After the deprecation, the app will no longer function if opened.

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 on April 30, 2020.

Data Load Wizard - Additional Validation for Active Period Data

When using the User data load in Data Load Wizard to update active period data, the Active value must be set to True, and an Activation Date and Deactivation Date must be provided. If the following are not true, the load will result in an error.

- If the Active value is set to True for a user, then Activation Date and Deactivation Date values must be provided for the user.
- If an Activation Date or Deactivation Date is provided for a user, then the Active value must be set to True for the user, and both the Activation Date and Deactivation Date values must be provided for the user.

If the Active value is set to False for a user, then the Activation Date and Deactivation Date columns do not need to be provided for the user.

This functionality was released with the 10 January 2020 patch.

Implementation

This functionality is automatically enabled for all organizations using the User data load in the Data Load Wizard.

Data Load Wizard - GUID Required to Convert Applicant to User

When using the User data load in the Data Load Wizard, a new validation has been added. When converting an applicant to an employee via the User load in the Data Load Wizard, the user's GUID must be provided. Lack of a GUID will result in an error.

This functionality was released with the 6 December 2019 patch.

Implementation

This functionality is automatically enabled for all organizations using the User load within the Data Load Wizard.

Glossary

- GUID (Global Unique Identifier) - This is a unique ID that some organizations use to identify users in their system.

Edge Import - LMS Historical Data, Employee and OU Bulk Loads and Feeds (Early Adopter)

With the February ’20 Release, Edge Import is available to organizations as an Early Adopter for Employee/Organizational Unit (OU) loads and feeds and also for loading Learning Management System (LMS) historical data.

Note: The Employee load and feed currently cannot be used by organizations using Cornerstone HR (CHR).

The LMS data load is not available until a post-release patch.

Employee and OU Loads and Feeds

Prior to this enhancement, bulk employee and OU data was maintained via the Data Load Wizard (DLW). As it was developed a few years ago, DLW has limitations on performance, data/business rule validations, and user experience. Edge Import support for self-service employee and OU data loads and feeds provides improved performance in load and feed times along with targeted error handling and support for troubleshooting. Edge Import also offers enhanced data integrity with support for in-file and cross-file concurrency and dependency resolution.

The following functionality is available with the February ’20 Release:

- Download template guide for employee and OU data
- Configure employee and OU data import templates
- Validate employee and OU loads
- Load employee and OU data in bulk
- Include employee and OU file types during feed setup
- Set up, schedule, and monitor automated feed execution
- Execute manual feeds with employee and OU data
- Step by step guide with help text and examples for usage of specific features
- Feedback on status of post processing events
- Max file size: 100K rows, 150 columns
- Primary keys supported - User ID (Creates and Updates) and GUID (Updates only)

The following OU types can be imported using Edge Import:

- Cost Center
- Division
- Grade
- Legal Entity
- Location
- Position

LMS Historical Data

Organizations are able to control their own project timelines by validating and loading LMS historical data directly to their portals using Edge Import.

Note: LMS data feeds are not supported with the February '20 release.

With this enhancement, Edge Import can now be used to import employee data, organizational unit (OU) data, and historical Learning Management System (LMS) data.

The following LMS data types can be imported using Edge Import:

- Curriculum
- Curriculum Transcript
- External Training
- Facility
- ILT Events
- ILT Session Parts
- ILT Sessions
- ILT Transcript
- Instructor
- LO (Learning Object) Equivalencies
- Material
- Material Transcript
- Online Course
- Online Course Transcript
- Provider
- Question Category
- Questions
- Subject
- Test
- Test Mapping
- Test Transcript
- Transcript Custom Fields
- Video
- Video Transcript

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. 2. Use Delta files, instead of complete loads. 3. Break files that are larger than 10k rows to multiple files that are 10k rows or fewer.
Stage	100k rows, 150 columns	1. Use Delta files, instead of complete loads.

ENVIRONMENT	MAXIMUM FILE SIZE	BEST PRACTICES TO REDUCE IMPACT
		2. Break files that are larger than 100k rows to multiple files that are 100k rows or fewer.
Production	100k rows, 150 columns	1. Use Delta files, instead of complete loads. 2. Break files that are larger than 100k rows to multiple files that are 100k rows or fewer.

Use Cases

Scarlett is an administrator who is responsible for managing personnel information (employee and other talent related data) within the Cornerstone portal for The Acme Corporation. Acme Corporation currently has several integrated 3rd party systems that have employee related data. These are interconnected via APIs and bulk data interfaces to keep their employee details correctly synchronized.

Scarlett is primarily responsible for keeping the Cornerstone system updated with company and employee data maintained in their system of record. Scarlett can maintain data in two ways:

- For data that gets updated at a set cadence, she creates and manages automated feeds into Cornerstone.
- For data that requires changes on demand and do not have a set pattern or frequency, she performs one-time imports.

Scarlett is able to keep track of all of her executed and completed loads and feeds over time. She is also able to view a summary for any load or feed.

Considerations

- The Employee load and feed currently cannot be used by organizations using Cornerstone HR (CHR).
- LMS data feeds are not supported with the February '20 release.
- LO and transcripts related to certifications and on the job training (OJT) are not currently supported.
- LO reversioning is not currently supported.
- Once an Employee, OU, or 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, OU, and User data loads:

- Organizations that are currently using Data Load Wizard can enable the Edge Import data loads and feeds in the following way:
  - Between February and March 2020 - Contact Global Product Support to enable this functionality.
  - Following March 2020 - This functionality can be enabled in Pilot and Stage portals via Edge Marketplace. This only enables the loads and feeds in Edge Marketplace. Once the organization has tested the functionality, they may enable the functionality in their Production portals following the February release by contacting their Client Success Manager.
- Organizations that are not currently using Data Load Wizard can enable the Edge Import data loads and feeds in all environments via Edge Marketplace. This functionality is not available in Production portals until after the February release.

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.

The LMS data load is not available until a post-release patch.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access CHR - Employee Load	Grants access to the Cornerstone HR (CHR) employee data load via Edge Import. This permission and data load type are only available to organizations using CHR. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Cost Center	Grants access to the Cost Center OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Custom OU	Grants access to the Custom OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Division	Grants access to the Division OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Access Edge Import Workflow - Grade	Grants access to the Grade OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Legal Entity	Grants access to the Legal Entity OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Location	Grants access to the Location OU data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Position	Grants access to the Position OU data load via Edge Import. 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

The following existing permissions apply 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
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 Import - Load Employee Salary	Grants access to the employee salary data load via Edge Import. 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
Enable/Disable Feeds	Grants ability to enable or disable a data feed in Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Manual Run Feed	Enables administrator to manually initiate a data feed processing. This permission cannot be constrained. This is an administrator permission.	Edge Import
Set up Feed	Enables administrator to access the Feed Settings page where the administrator can create and update feeds and schedule feeds. This permission does not grant the ability to activate feeds or manually run feeds. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, all new Edge Import permissions are automatically granted to the default System Administrator role. Administrators must grant these permissions to other roles, if necessary.

Email Deactivation Warning Message

With this enhancement, when an administrator navigates to Email Administration and selects one or more emails to be deactivated, a pop-up appears requiring the administrator to confirm their action. The pop-up states: "We have noticed that you are attempting to deactivate email(s). Are you sure you would like to continue?"

How Does this Enhancement Benefit My Organization?

This enhancement helps organizations avoid inadvertently deactivating emails in Email Administration.

Implementation

This functionality is automatically enabled for all organizations. It is not available in Stage during UAT.

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

Enabling Captcha Globally

CAPTCHA (Completely Automated Public Turing test to tell Computers and Humans Apart) is functionality used in some portals during user authentication. When enabled, the CAPTCHA field appears when completing the self-registration page, creating a career site profile, or when retrieving a forgotten username or password. The CAPTCHA field also displays when using “Refer by Email” in the Career Center and on career sites.

Prior to this enhancement, Cornerstone's CAPTCHA functionality was not supported in regions that are unsupported by google.com. As a result, if an organization had users based in a region that is unsupported by google.com, they often disabled CAPTCHA functionality for their portal.

With this enhancement, when CAPTCHA functionality is enabled in a portal, "www.recaptcha.net" is automatically used in regions where "www.google.com" is not accessible, allowing for all users globally to utilize CAPTCHA based validation.

How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to enable CAPTCHA for the entire organization, even in regions that don’t support Google.

Use Cases

Mien is an administrator of a Cornerstone portal in which users are distributed globally, including Brazil, China, and Germany. She would like to enable CAPTCHA for her entire user base to improve authentication security. With this enhancement, Mien is able to enable CAPTCHA for the entire portal and successfully leverage CAPTCHA for login authentication for all users.

Implementation

This functionality is automatically enabled for organizations that currently have CAPTCHA enabled.

To enable CAPTCHA, contact Global Product Support.

Glossary

- CAPTCHA (Completely Automated Public Turing test to tell Computers and Humans Apart) - This is functionality used in some portals during user authentication. When enabled, the CAPTCHA field appears when completing the self-registration page, creating a career site profile, or when retrieving a forgotten username or password. The CAPTCHA field also displays when using “Refer by Email” in the Career Center and on career sites.

Expire User Sessions at Password Reset

With this enhancement, anytime a user resets their password, they are logged out of the system and are required to log in with the new password to access the portal.

This functionality was released with the 1 November 2019 patch.

Implementation

This functionality is automatically enabled for all organizations.

February '20 Language Pack Updates

New updates to Cornerstone Language Packs are available with the February ’20 Release. Please visit the **Language Pack Updates** topic in the Success Center to review the full list of changes. The list of changes are available on January 6 and finalized on January 13. Languages with updates include:

- Arabic
- Czech
- Spanish (Spain)
- French (Canada)
- French (France)
- Italian
- Japanese
- Lithuanian
- Dutch
- Polish
- Portuguese (Brazil)
- Russian
- Slovak
- Slovenian
- Swedish
- Thai
- Chinese (Traditional)

Implementation

This functionality is automatically enabled for all organizations.

jQuery Library Upgraded with the May '20 Release

With the May ’20 Release, jQuery 1.7 will be deprecated and replaced with jQuery 3.4 libraries in all portals.

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, 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, clients review all custom code for any other outdated jQuery prior to the May ’20 release.

jQuery Validation Tool

See jQuery Validation Tool.

Resources

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

- 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

Reporting 2.0 (Early Adopter) Enhancements

Reporting 2.0 (Early Adopter) Enhancements - Overview

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

The following features are available with the February '20 release:

- **Aggregate Values and Totals**
- **Additional Summary Options for Chart Data**
- **Incumbent Permissions/Constraints Apply to Succession Reports**
- **Expand/Collapse Filter Section on Report Viewer**
- **Applicant User Alias** - ***Note:*** *This functionality was previously made available as part of the 6 December 2019 patch release.*

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

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

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

Reporting 2.0 - Early Adopter Details

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

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

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

Use Case

Anna Administrator

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

Vicky Viewer

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

Implementation

The Reporting 2.0 functionality must be self-enabled. For self-enablement information. All clients can opt-in to Early Adopter in Stage, Pilot, and Production portals. *See* **Enable Reporting 2.0** on page 154 *for additional information.*

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

Security

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

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

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

You would also need:

- The top-level product specific permission to create reports related to that product.
  - e.g. Reporting - Learning - Manage
- The section specific permission to create reports for that feature within the product.

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

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

The power of this granularity of permissions is that you can give access to as many or as few fields as necessary for your users. For example, you may give users access to the User section but not give them access to the User Identifier section if that contains sensitive data for your portal.

Reporting 2.0 List of Permissions

For the full list of existing permissions and their relationships, **see the permissions spreadsheet in Online Help**.

Permission Constraints

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

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

Enable Reporting 2.0

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

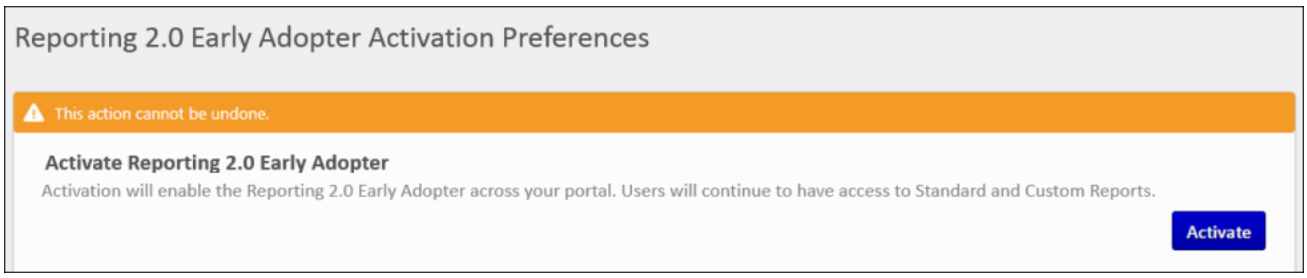
Each Early Adopter client should have a stakeholder experienced with building custom reports. The stakeholder(s) should build report templates and share them with other users. The other users do not need Custom Reports experience, as they will simply be using templates and downloading reports. ***Note:***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

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

Self-Enablement

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

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



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

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

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

Note about Copydowns: *If you request a copydown from a portal without Reporting 2.0 activated, please also request that the activation page be re-enabled. You will need to re-*

enable (e.g., if you are enabled in Stage but not Pilot/Production, and copydown, you will have to re-enable in Stage.)

Supported Environments

The following environments are supported:

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

Aggregate Values and Totals

Prior to this enhancement, aggregation operators were only available in custom reporting. Further, only group aggregation was available.

With this enhancement, aggregation operators are now available in Reporting 2.0. Aggregation operators enable users to total their reports by applying average, minimum, maximum, or sum to selected columns. Reporting 2.0 delivers aggregations for the entire data set and outputs the result in the last line of the report. Group aggregation is still available in Reporting 2.0 simply by summarizing the report.

Aggregate values display for each segment of a summarized report. In addition, a grand summary appears as the last row in a summarized report.

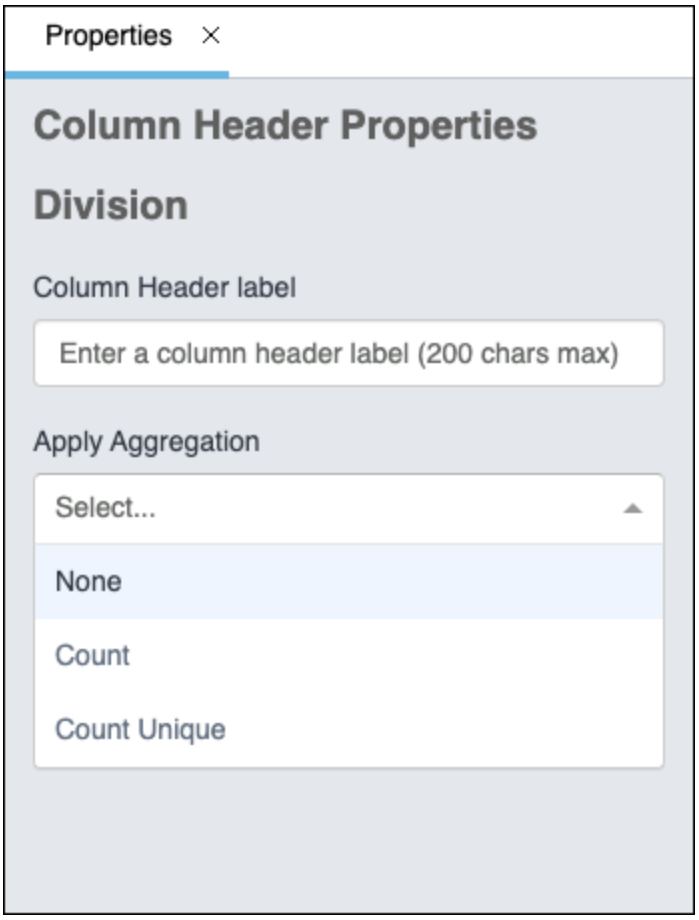
Migration Note: *Migration of custom reports that have aggregation operations in their reports is not yet available.*

Aggregate Operators

The type of operator that is available for a field depends on the field type. All fields can be aggregated by count and count unique, but only numeric fields can be aggregated by sum, average, minimum, and maximum.

Aggregate values are displayed for each segment of a summarized report.

To access aggregation operators, click the icon to the right of the field name in the Table Columns section. This opens the column properties panel. The available operators appear in the Apply Aggregation section:



Aggregation Operators for Numeric Data Types

The following aggregation operators are available for numeric data types:

Sum

This displays the sum of all values for the field. When selected, the column name changes to <Sum [Field Name]>. To remove the sum function, select **Remove Sum** from the drop-down.

Average

This option is available for numeric fields only. This displays the average of all values for the field.

Minimum

This option is available for numeric fields only. This displays the minimum value for the field.

Max

This option is available for numeric fields only. This displays the maximum value for the field.

Aggregation Operators for All Data Types

The following aggregation operators are available for all data types:

Count

This option gives you a total count of the values within a field. When you select the **Count** option, the word "Count" is added to the title of the column.

For example, you are creating a Transaction Custom Report and would like to know the total number of credit and debit transactions in your portal. You add the **Transaction User** field and the **Transaction Type** field to the report. You apply the **Count** option to the **Transaction User** field, and then you open the Preview panel. The report previews an aggregate of the number of transactions within each transaction type. You return to the Builder tab and filter the **Transaction Type** field by "Credit" and "Debit." Back on the Preview panel, you find that the report is filtered to show only credit and debit transactions. The count operator at the bottom of the report gives you the total number of credit and debit transactions in your portal.

Count Unique

This option gives you a total count of the unique values within a field. When you select the **Count Unique** option, the words "Count Unique" are added to the title of the column.

For example, you are creating a Training Custom Report and would like to know the total number of training items that are in each training type. This will help you see which training types have the most training items and which training types have the least training items. To do this, you add the **Training Type** field and the **Training Title** field to the report. For the **Training Title** field, you apply the **Count Unique** option from the aggregation operators in the column properties panel. You go to the Preview panel and find that the report shows a list of each training type, along with the number of training items within each training type.

Usability Enhancements

The following smaller enhancements for the February '20 release are intended to improve the user experience for Reporting 2.0:

Additional Summary Options for Chart Data

When summarizing by a date field on a chart, a calendar icon now appears to the right of the **Summarize by** field. Clicking the icon opens the following additional summarizing options:

- Day
- Month
- Year
- Calendar Quarter
- Calendar Year

Incumbent Permissions/Constraints Apply to Succession Reports

Prior to this enhancement, incumbent permissions and constraints only applied to Job Pool Succession Reports.

With this enhancement, incumbent permissions and constraints apply to both Job Pool Succession Reports and Succession Reports.

UAT Availability Note: *This feature is not available at the start of user acceptance testing (UAT) for the February '20 release. This feature will be available at a later date during UAT.*

Expand/Collapse Filter Section on Report Viewer

This enhancement lets you expand and collapse the filter section on the **Report Viewer page**.

Date Format in Chart

Prior to this enhancement, the date format for charts followed the default system format for dates, while reports followed the date format based on the user's culture.

With this enhancement, the date format in the chart is based on the user's culture, which matches the report output.

Applicant User Alias

Note: *This functionality was previously made available as part of the 6 December 2019 patch release.*

With this enhancement, the following changes are made to Applicant fields in Reporting 2.0:

- When creating a Recruiting report, the name of the "User" field group will appear as "Applicant User." This helps to better represent Recruiting user types in Reporting 2.0. *See the Permissions section below for new permissions that apply to this change.*
- The "Applicant" field group is renamed "Applicant Details."

Implementation

This functionality is available for all portals with Reporting 2.0 enabled.

The Reporting 2.0 functionality must be self-enabled. All clients can opt-in to Early Adopter in Stage, Pilot, and Production portals. *See Enable Reporting 2.0.*

Permissions

The following new permissions apply to the Applicant User field group functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Recruiting - Applicant - Applicant User - Manage	Grants users ability to manage the Applicant User field group in Reporting 2.0. This permission is used in conjunction with the necessary product, section, and field level permissions. Users must have permission to view or manage Reporting 2.0 in order to have access to it.	Reporting
Reporting - Recruiting - Applicant - Applicant User - View	Grants users ability to view the Applicant User field group in Reporting 2.0. This permission is used in conjunction with the necessary product, section, and field level permissions. Users must have permission to view or manage Reporting 2.0 in order to have access to it.	Reporting

STS Authentication Deprecation to Begin in February 2020

Cornerstone's custom authentication framework, Session Token Service (STS), will be deprecated in February 2020 and will be fully retired and unavailable in February 2021. During the deprecation phase, Cornerstone will stop supporting 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.

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. 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/CHR services)
- Express Class API
- Job Application API

The following are NOT currently impacted:

- xAPIs
- SOAP APIs

RTDW Updates to Reporting API, RDW, and Data Exporter

Impacting only clients using Reporting API, Replicated Data Warehouse, 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.

RTDW Deprecated Objects - For Feb' 20 Release

This table describes the objects that will be deprecated with the Aug '19 release. Do not use these deprecated objects in new development work, and modify applications that currently use these deprecated objects as soon as possible.

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
Certification	transcript fields in report.vw_rpt_certification	Transcript fields in report.vw_rpt_transcript. Join report.vw_rpt_certification with report.vw_rpt_transcript on user_id = transc_user_id and cert_object_id = transc_object_id and reg_num = reg_num	Release 20.01.00 (Feb 2020)	Deleted
Compliance	report.vw_rpt_compliance	No replacement, 'Compliance Report' Report Category was deprecated and deleted in Release 19.02.00 (May 2019).	Release 20.01.00 (Feb 2020)	Deleted
Evaluation	transcript fields in report.vw_rpt_evaluations	Transcript fields in report.vw_rpt_transcript. Join report.vw_rpt_evaluations with report.vw_rpt_transcript on target_user_id = transc_user_id and re_eval_lo_id = transc_object_id eval_reg_num (new field that will be added) = reg_num	Release 20.01.00 (Feb 2020)	Deleted
Test	transcript fields in report.vw_rpt_test	Transcript fields in report.vw_rpt_transcript. Join report.vw_rpt_test with report.vw_rpt_transcript on	Release 20.01.00 (Feb 2020)	Deleted

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
		eval_user_id = transc_user_id and eval_lo_id = transc_object_id and eval_reg_num = reg_num		
Transaction	transcript fields in report.vw_rpt_transaction	Transcript fields in report.vw_rpt_transcript. Join report.vw_rpt_transaction with report.vw_rpt_transcript on rb_user_id = transc_user_id and rb_object_id = transc_object_id and trans_reg_num = reg_num	Release 20.01.00 (Feb 2020)	Deleted
Training and Transcript	[user_lo_remover_first_name], [user_lo_remover_last_name] fields in report.vw_rpt_transcript	[user_name_first] , [user_name_last] fields in report.vw_rpt_user. Join report.vw_rpt_transcript with report.vw_rpt_user on user_lo_remover_id (new field that will be added to report.vw_rpt_transcript) = user_id (in report.vw_rpt_user)	Release 20.01.00 (Feb 2020)	Deleted
Training and Transcript	[exemptor_ref], [exemptor_full_name] fields in report.vw_rpt_transcript	[user_ref], [user_name_first], [user_name_last] fields in report.vw_rpt_user. Join report.vw_rpt_transcript with report.vw_rpt_user on exemptor_id = user_id	Release 20.01.00 (Feb 2020)	Deleted
Training and Transcript	[user_part_attendance] field in report.vw_rpt_transcript	New report object with [user_part_attendance] field will be provided	Release 20.01.00 (Feb 2020)	Deleted
Training and Transcript	[user_lo_status] field in report.vw_rpt_transcript	[status] in report.vw_rpt_transcript_status_local Join report.vw_rpt_transcript with report.vw_rpt_transcript_status_local on user_lo_status_id (in report.vw_rpt_transcript) = status_id and culture_id =1 (default culture)	Release 20.01.00 (Feb 2020)	Deleted

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
User	OU fields in report.vw_rpt_user	report.vw_rpt_user_ou_info 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 20.01.00 (Feb 2020)	Marked for deletion
User	User dynamic relation fields in report.vw_rpt_user	report.vw_rpt_user_dynamic_relation Join report.vw_rpt_user_dynamic_relation with report.vw_rpt_user on user_dynamic_relation_user_id (vw_rpt_user_dynamic_relation) = user_id (report.vw_rpt_user)	Release 20.01.00 (Feb 2020)	Marked for deletion

Scheduled Changes in RTDW Objects

This table describes changes in RTDW objects for future releases.

CATEGORY	OBJECT/FIELDS	DATE OF SCHEDULED CHANGE	ACTION
Development Plan	Datatype for [target_dt] field in report.vw_rpt_devplan will be changed from smalldatetime to datetime.	Release 20.01.00 (Feb 2020)	Marked for update
Succession	Datatype of the succession custom fields in report.vw_rpt_succession_incumbent_smp_cf will be changed from nvarchar(4000) to datatype based on the custom field type, e.g.: ○ ‘Checkbox’: bit ○ ‘Date Field’: datetime ○ ‘Numeric Field ‘: float ○ ‘Short Text Box’: nvarchar(200) ○ ‘Scrolling Text Box: nvarchar(2000)	Release 20.01.00 (Feb 2020)	Marked for update

CATEGORY	OBJECT/FIELDS	DATE OF SCHEDULED CHANGE	ACTION
Training Plan	Datatype and values for training plan custom fields of type Enumerated Options in report.vw_rpt_training_plan_forecasted_item will be changed: Datatype: from nvarchar(200) to int Values: from Option label to Option ID	Release 20.01.00 (Feb 2020)	Marked for update
Evaluation	Transcript fields will be removed from report.vw_rpt_evaluations (as described in RTDW Deprecated Objects), new field eval_reg_num - the registration number for the transcript will be added. Before the change, report.vw_rpt_evaluations has transcript fields for trainings only with latest registration (is_latest_reg_num = 1). After change, joining report.vw_rpt_evaluations and report.vw_rpt_transcript will allow to have transctipt fields for all registered trainings.	Release 20.01.00 (Feb 2020)	Updated
User	Data in report.vw_rpt_user_ou_info after change will include users' OU details for OU of all OU types which allow singular membership. Before change report.vw_rpt_user_ou_info includes users' OU details for OU of the OU types that have defined in application flag 'Show in Analytics' and excuded OU type 'Group'	Release 20.01.00 (Feb 2020)	Marked for update

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
[user_ou] (RTDW object	[user_ou_core] - User-OU associations that exclude Organizational Units that have OU	Release 20.01.00 (Feb 2020)	Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
report.vw_rpt_user_ou)	types: "Legacy Availability", "Deprecated Legacy Availability”		
user_groups_core	[user_ou_multi_core] - User-OU associations (multi-membership only). This is a subset of user_ou_core whose OU types allow for multi-membership. Note: deprecated [user_groups_core] included User-OU associations only for OU type ‘Group’. [user_ou_multi_core] includes all multi-membership User-OU associations, for OU type ‘Group’ use filter ou_type_id = 128 .	Release 20.01.00 (Feb 2020)	Marked for deletion
ou_type	[ou_type_core] – OU type master list that excludes OU types: "Legacy Availability", "Deprecated Legacy Availability” and inactive OU types	Release 20.01.00 (Feb 2020)	Marked for deletion
compliance	No replacement, 'Compliance Report' Report Category was deprecated and deleted in Release 19.02.00 (May 2019).	Release 20.01.00 (Feb 2020)	Marked for deletion
Following fields in [transcript] object (documented in RTDW Documentation: report.vw_rpt_transcript) [user_lo_remover_first_name], [user_lo_remover_last_name], [exemptor_ref], [exemptor_full_name], [user_part_attendance], [user_lo_status]		Release 20.01.00 (Feb 2020)	Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
Datatype for [target_dt] field in [devplan], [due_dt] field in [devplan_core], will be changed from smalldatetime to datetime		Release 20.01.00 (Feb 2020)	Marked for deletion
[lo_root_id] field in [training_core]	New field [source_object_id] in [training_core] (it will be available in 19.04.01)	Release 20.02.00 (May 2020)	Marked for deletion
COMPATIBILITY_ou_title_local	[ou_local_core]	Release 20.02.00 (May 2020)	Marked for deletion
COMPATIBILITY_qti_text_local	[qna_text_local_core]	Release 20.02.00 (May 2020)	Marked for deletion
ou	[ou_core]	Release 20.02.00 (May 2020)	Marked for deletion
training_type	[training_type_core]	Release 20.02.00 (May 2020)	Marked for deletion
training_type_local	[training_type_local_core]	Release 20.02.00 (May 2020)	Marked for deletion
transcript_status	[transcript_status_local_core] Use filter for default culture: [is_default] = 1	Release 20.02.00 (May 2020)	Marked for deletion
transcript_status_local	[transcript_status_local_core]	Release 20.02.00 (May 2020)	Marked for deletion
training_title_local	[training_local_core]	Release 20.02.00 (May 2020)	Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
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)	Marked for deletion
custom_field_value	Custom Field Enumerated Options Localization objects. Use filter for default culture: [is_default] = 1: [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)	Marked for deletion
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)	Marked for deletion
COMPATIBILITY_training_form_cf_display _value_local	[training_cf_enum_local_core]	Release 20.02.00 (May 2020)	Marked for deletion

Cornerstone HR

Secure User Custom Fields

This functionality will be available in the May 2020 release.

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.

Point-In-Time Headcount - New Fields

This functionality will be 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

Learning

Content Anytime - Digital Native Advancement (DNA)

The Professional Skills content subscription has been enhanced with a new original microlearning series called Digital Native Advancement (DNA), which prepares digital natives for the workforce. The series includes twenty-seven nano learning courses which are quick, easy to consume, highly visual, and mobile-first. This new series will help Generation Z and Millennials (Digital Natives) with the interpersonal skills they need to be successful at work.

Content Anytime Leadership and Management Subscription - Plan Z

A new Cornerstone Originals microlearning series called Plan Z is now available as a companion to the Digital Native Advancement (DNA) series. Instead of focusing on the end learner, this series is designed to help managers and HR leaders work with and welcome digital natives. Managers of digital natives can learn how to more effectively coach, communicate with, empower,and lead their employees.

Content Anytime Modern Compliance Subscription - New Grovo Content

Compliance regulations are constantly evolving, so we have evolved the Content Anytime Modern Compliance subscription to include new Grovo microlearning lessons which meet compliance requirements for California, Canada, and the higher education markets. New Grovo lessons cover the topic of Sexual Harassment, designed for employees and supervisors in California and Canada, as well as educators, administrators, and employees at higher education institutions who need mandated training on FERPA and TITLE IX.

Content Anytime Professional Skills Subscription - New Grovo Content and Learning Pathways

New Grovo microlearning lessons on work/life balance, storytelling, developing confidence, and practicing mindfulness at work are now available. These lessons are designed both for employees who are new to the workforce and for more senior employees facing new professional challenges. 150+ Grovo lessons have also been newly localized in French, German, and Spanish, to better meet the needs of EMEA organizations. This subscription also now includes new Learning Pathways, which are designed to help learning administrators increase engagement and adoption of the content in this subscription. Each Pathway includes a variety of courses and blended learning activities.

Cornerstone Learn - Custom Links

Cornerstone Learn - Additional Custom Links

With this enhancement, organizations using the Cornerstone Learn app can add up to ten custom links to the navigation panel of the app. These custom links can be configured via the Mobile Preferences page.

This enhancement will be made available during a post-release patch.

Use Case

ACME Corp is a manufacturing company that leverages the Cornerstone system for both Learning and Performance. Much of their workforce are on the factory floor, and they use smart phones and tablets to complete compliance training, perform on-the-job observations, conduct check-ins, post to Connect communities, update goals, and more.

ACME Corp has just rolled out the Learn App to allow their workforce to easily consume training via their mobile devices. In the navigation panel of the app, they have also included custom links to a few mobile-responsive Cornerstone system pages, such as Observations Checklists, Connect, Check-ins and Goals, allowing ACME to provide their users with an even more integrated experience.

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
Mobile Preferences	Grants ability to manage Mobile Preferences. This permission cannot be constrained.	Mobile

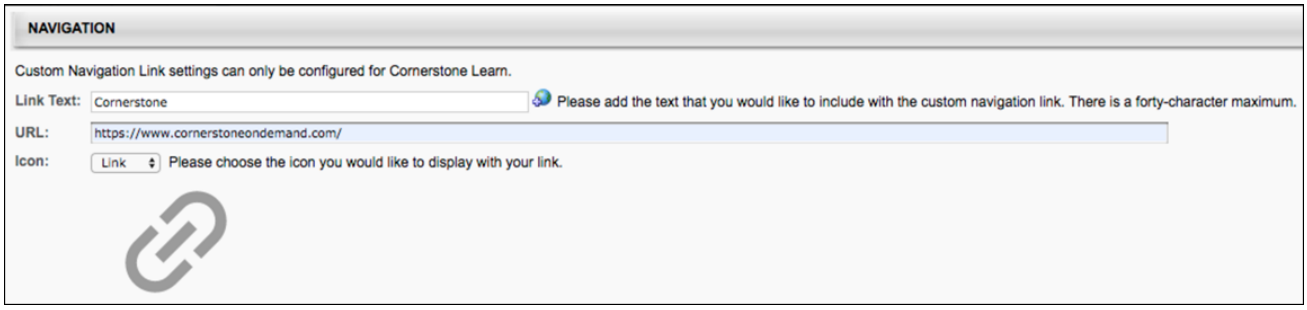
Mobile Preferences - Custom Links

Custom links for the navigation panel in the Cornerstone Learn app can be configured via Mobile Preferences. Up to ten links can be added to the navigation panel.

To access Mobile Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > MOBILE.

Permissions

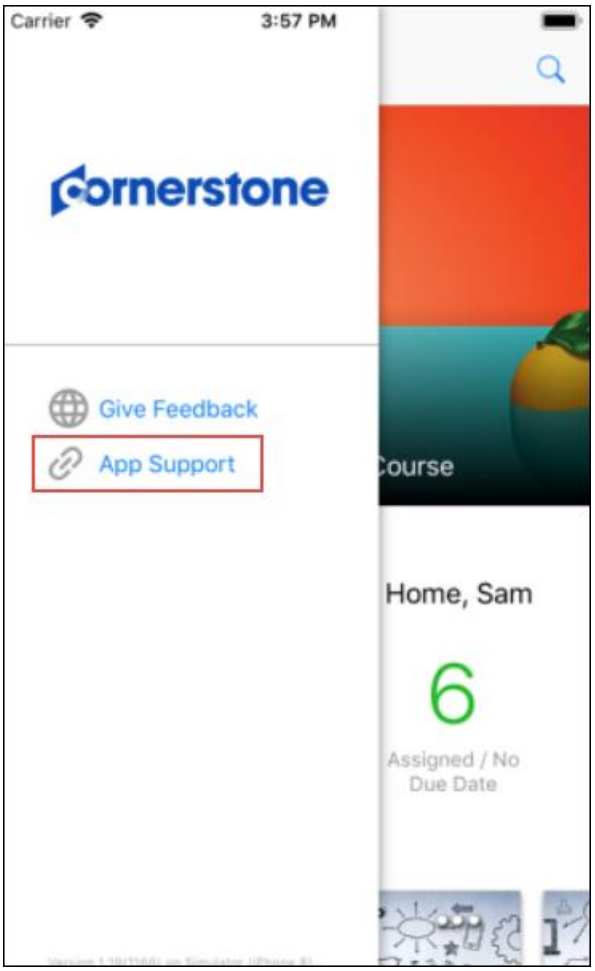
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Mobile Preferences	Grants ability to manage Mobile Preferences. This permission cannot be constrained.	Mobile



Navigation

To configure a custom link within the Cornerstone Learn app, populate the following fields:

- **Link Text** - Add text that will be included with the custom navigation link. The character limit for this field is 40 characters.
- **URL** - Enter the URL for the page you want to add as the custom link.
- **Icon** - Select the icon that should be displayed with your link from the drop-down menu.



Save, Restore Defaults, or Cancel

Click the **SAVE** button to save the preferences settings.

Click the **RESTORE DEFAULTS** button to restore the preferences to the default settings.

Click the **CANCEL** button to cancel the changes to the preferences settings.

For more information about Mobile Preferences: *See Mobile Preferences.*

Cornerstone Learn - Device Registration

Cornerstone Learn - Device Registration - Overview

With this enhancement, 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 deregister their account from their mobile device.

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 or Biometric authentication to use for future logins.
- Users can change their login method (PIN or Biometric) from the App Settings page.
- 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

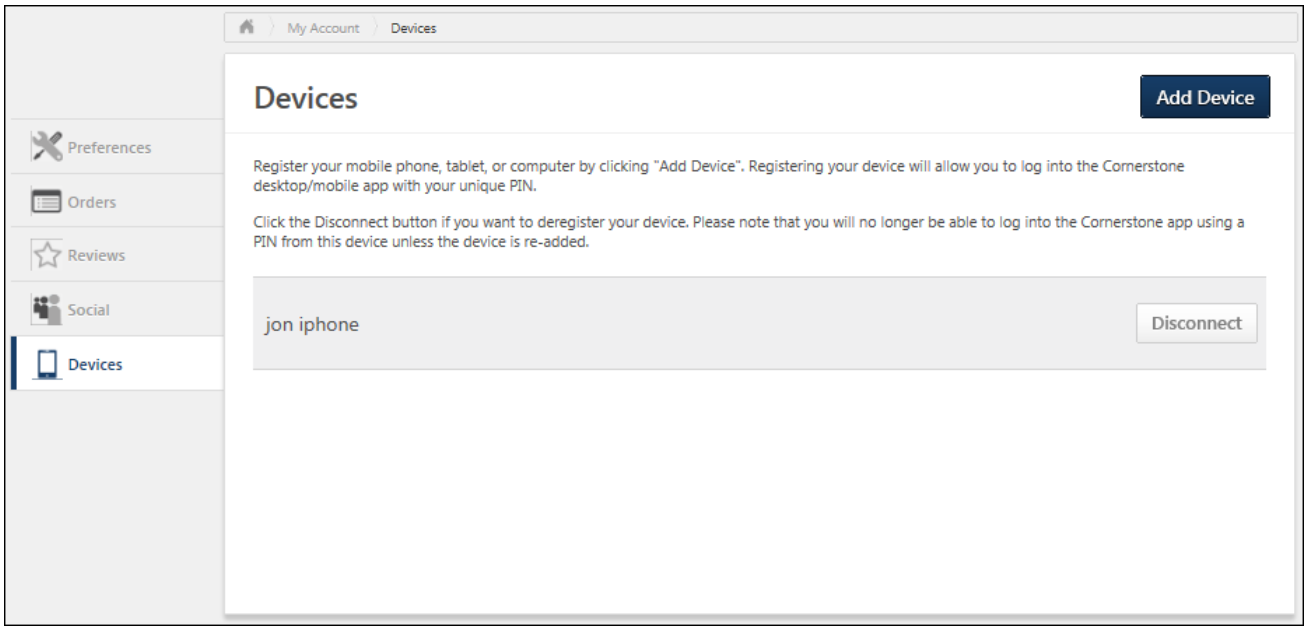
Register Device

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 or biometric authentication, you will be logged into the app. Continue to use the authentication method you configured for future logins.

- For information about configuring a PIN:*See* **Learn App - Configure PIN** on page 193 *for additional information.*
- For information about configuring biometric authentication: *See* **Learn App - Biometric Authentication** on page 188 *for additional information.*

Users can change their authentication method at any time via the Settings tab.

Cornerstone Learn - Improved Login Experience

Cornerstone Learn - Improved Login Experience - Overview

With this enhancement, the Cornerstone Learn app mobile login process has been improved to reduce friction and provide mobile learners with a more intuitive experience. The features are available with the new mobile login experience:

- PIN - Users can configure a PIN. Users will be prompted to set up a PIN during their first online login. If this prompt is dismissed, users are able to configure a PIN in Learn App Settings.
- Offline Login - Offline login into the Learn app is supported for users leveraging credentials, PIN, and Biometric authentication methods. Users must initially log into the app while online via any supported method. Users will then be prompted to enable Biometric, then PIN. After configuring either of these methods, this login method is remembered by the app until changed by the user. ***Note:*** *Either PIN or Biometric authentication can be enabled; both cannot be configured simultaneously.*
- Display Configured Login Page - After selecting a login method (PIN, Credentials, SSO, Biometrics), users receive the login page corresponding to their last elected authentication method, and they are prompted to log in via this method. For example, if the user initially configured a PIN, the next time they open the app, they are prompted to enter a PIN during login. Corporate colors and image, as well as the user's first name also display.
- Re-authentication for Biometric users - If a user fails or accidentally dismisses the Biometric prompt, the app re-prompts them, allowing the user to retry the authentication.
- Help Modal - The app has been updated with more help prompts and a help modal explaining what the user's portal name is.
- Alternative Login Method Selection - Users can toggle between login methods, allowing them to switch between SSO and credentials if needed. After entering a valid portal name on the initial login screen, the **Alternative Login Method** link becomes enabled. Tapping this link opens a modal, in which the user can switch login methods. The user will then progress through the existing login flow, ultimately allowing them to set a PIN or enable biometric authentication and log in to the app.

This enhancement is not available at the start of UAT; it will be made available with the Feb 7th release.

Use Case

ACME Airlines frequently deploys compliance training to its pilots, engineers, and flight attendants, to help them stay current with aviation regulations. ACME Airlines utilizes SSO to authenticate the learning management system when an internet connection is available. However, because employees are often flying, a large portion of ACME's user base frequently does not have access to the internet or data.

In the aviation industry, it is common practice for flight attendants and pilots to take compliance training during downtime on flights. Because employees can log into Cornerstone Learn while offline via PIN or Biometric and download content, these employees are now able to complete their compliance training offline. There is no need to

remember credentials, and there is no need for an internet connection, so ACME is able to more effectively maintain compliance.

Exclusions

Users may only have either PIN or Biometric enabled at a given time; they cannot have both configured simultaneously. They can change this method at any time via Settings.

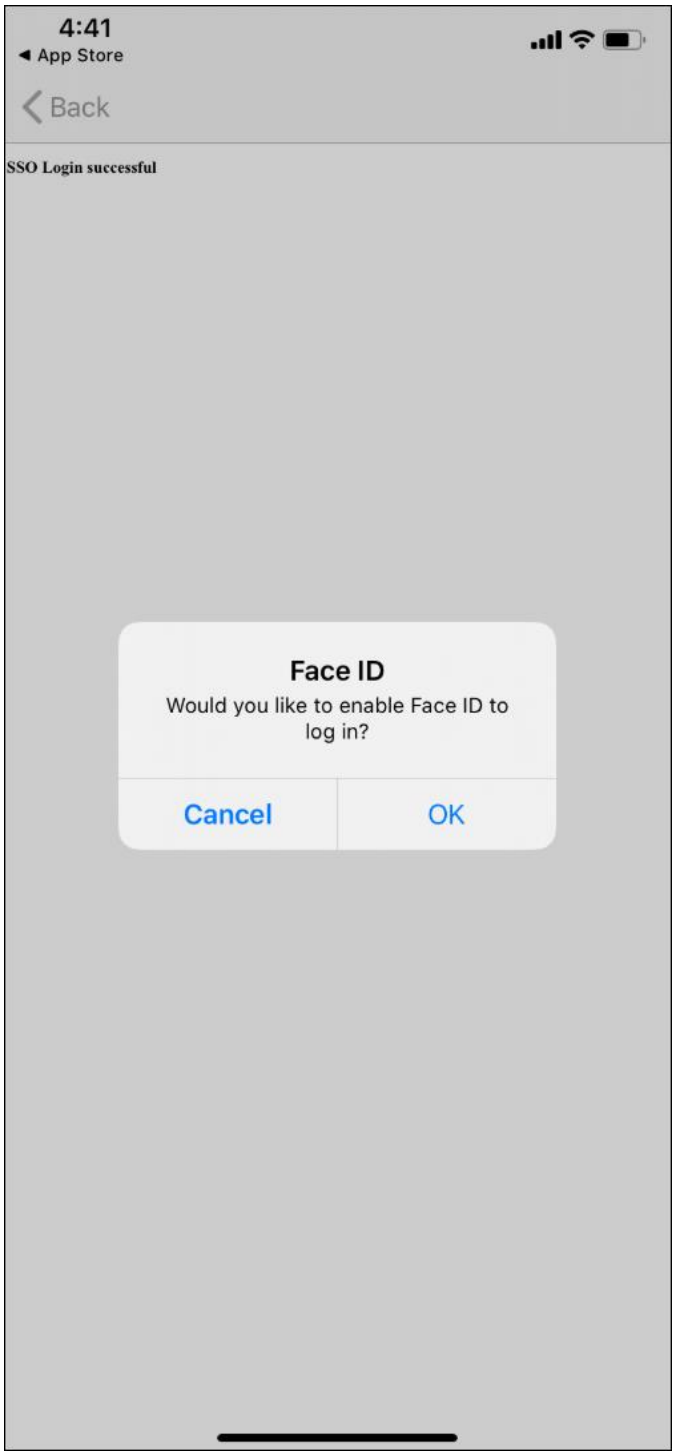
Implementation

- This functionality is available for the iOS version of the Learn app with the Feb 2020 release. Users must update their app via the Apple App Store.
- This functionality is available for the Android version of the Learn app with the Feb 2020 release. Users must update their app via the Google Play Store.

Learn App - Biometric Authentication

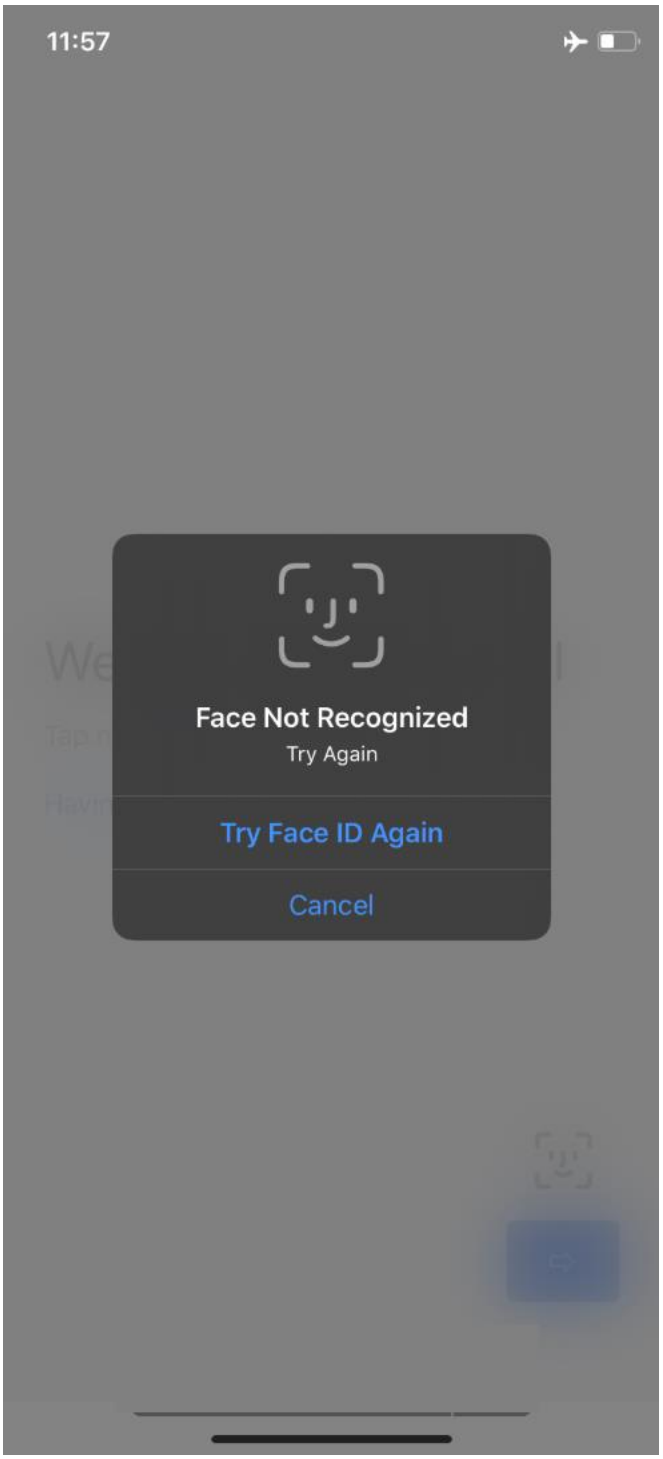
When a user initially accesses the Cornerstone Learn app, they are first prompted to enable biometric authentication for the app. If the user does not enable biometric authentication, the app will then prompt the user to configure a PIN.

- To enable biometric authentication, tap the OK button when prompted, and complete the setup process with your phone. Once biometric authentication is configured, the user will be prompted for biometric authentication each time they log in, unless they change their authentication method via the Settings tab.
- To bypass enablement of biometric authentication, tap the Cancel button. You will then be prompted to configure a PIN instead.



Biometric Reauthentication

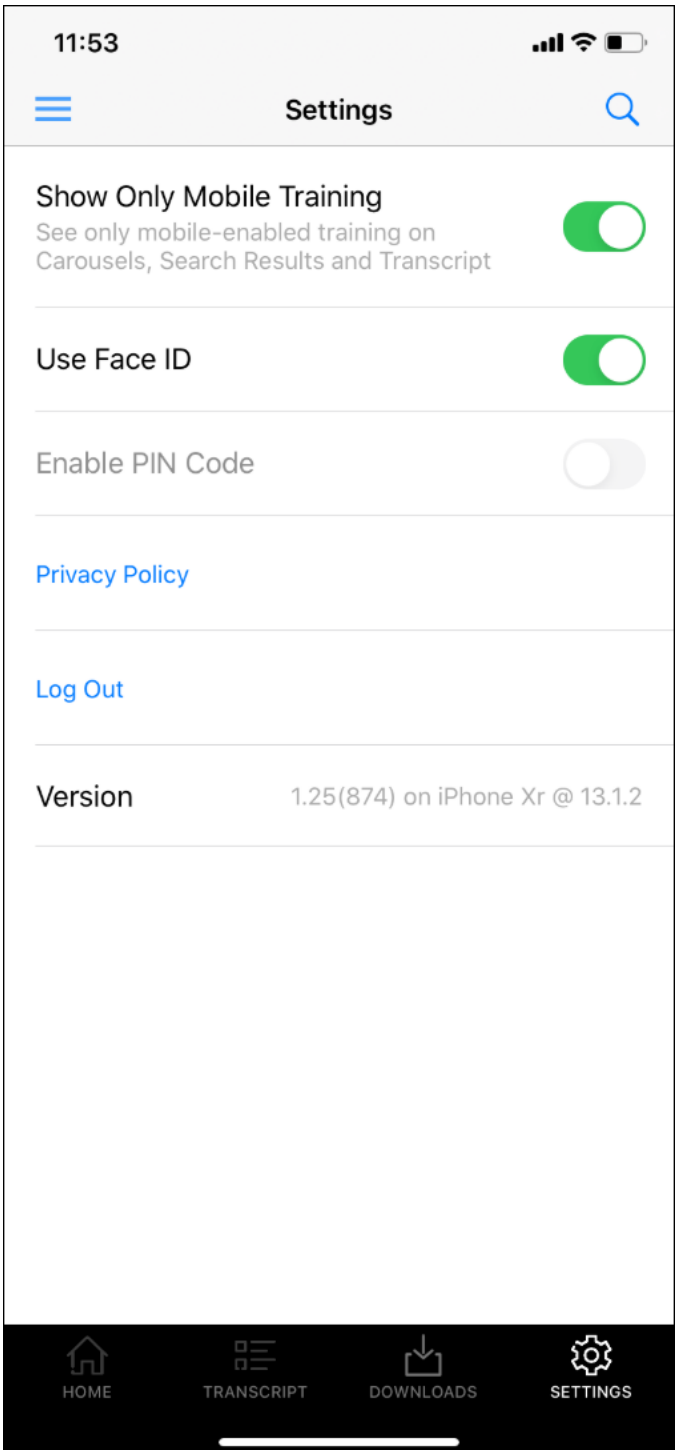
If the user's attempt to enable biometric authentication fails, they will be prompted to reauthenticate.



The user can attempt to try again, or they can cancel the biometric authentication setup. The user will be prompted to configure a PIN if they cancel the biometric authentication setup.

Authentication Settings

To reconfigure the authentication settings for the app at any time, the user can navigate to the Settings tab. To enable a different form of authentication, toggle the switch for that authentication type to the On position. The app will prompt the user to configure the enabled authentication type.



Considerations

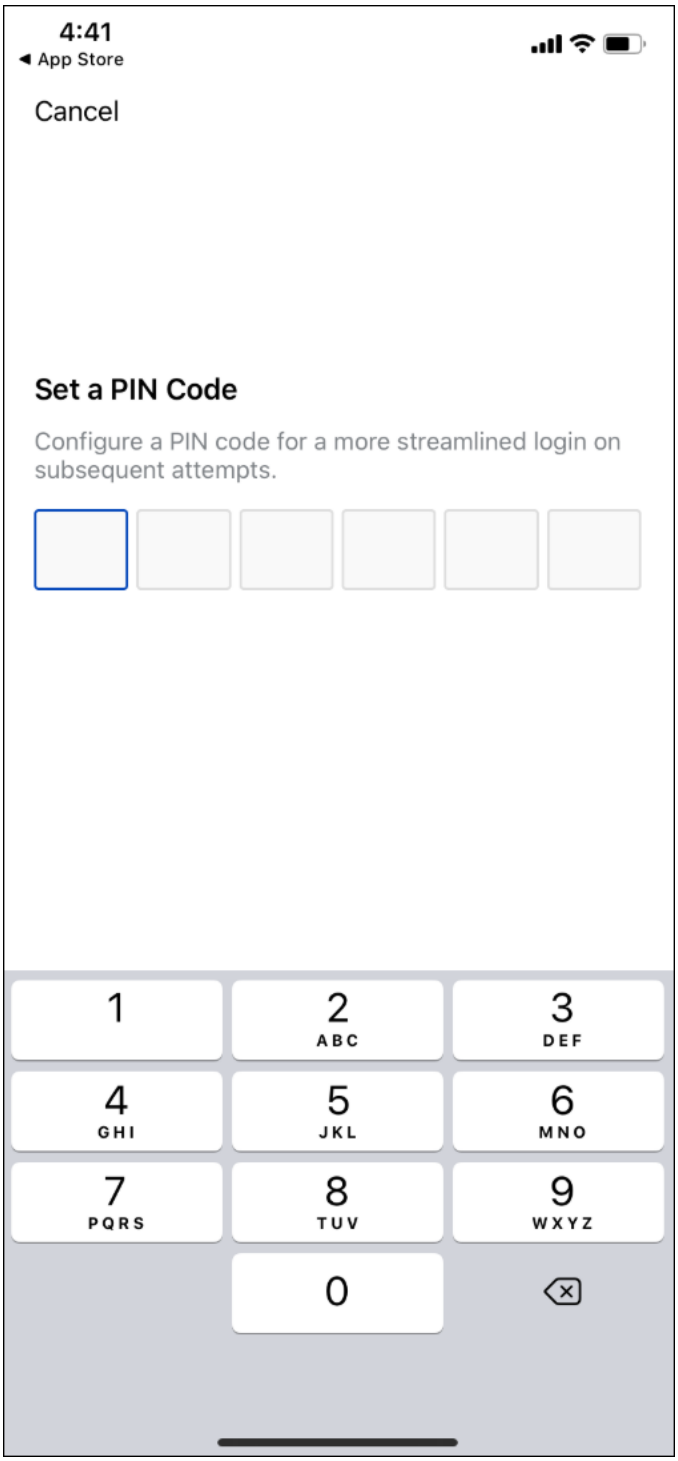
Depending on your organization's portal and application configurations, the beginning of your users' login experiences may differ slightly. See below for details:

- For SSO Users: Upon entering a valid portal name, "smart" logic is applied during login. If a user is configured for SSO, upon tapping the **NEXT** button, the user is navigated to the SSO page.
- For Credential Users: Upon entering a valid portal name, "smart" logic is applied during login. If a user's portal has no SSO configurations, upon tapping the **NEXT** button, the user is navigated to the credentials page.
- For organizations using both SSO and credentials: Upon entering a valid portal name, users are directed to the Username page. Upon entering their username, the app checks whether the user is in an organizational unit that has SSO enabled in Mobile Preferences.
    - If YES: User is navigated to the SSO page
    - If NO: User is navigated to the Learn App password screen
- If a portal has no SSO configurations and a user taps the **Alternative Device** link, the SSO option will not appear.
- If a user is offline, the **Alternative Device** link is disabled .
- The **Alternative Device** link is in a disabled state until a valid portal name is entered.

Learn App - Configure PIN

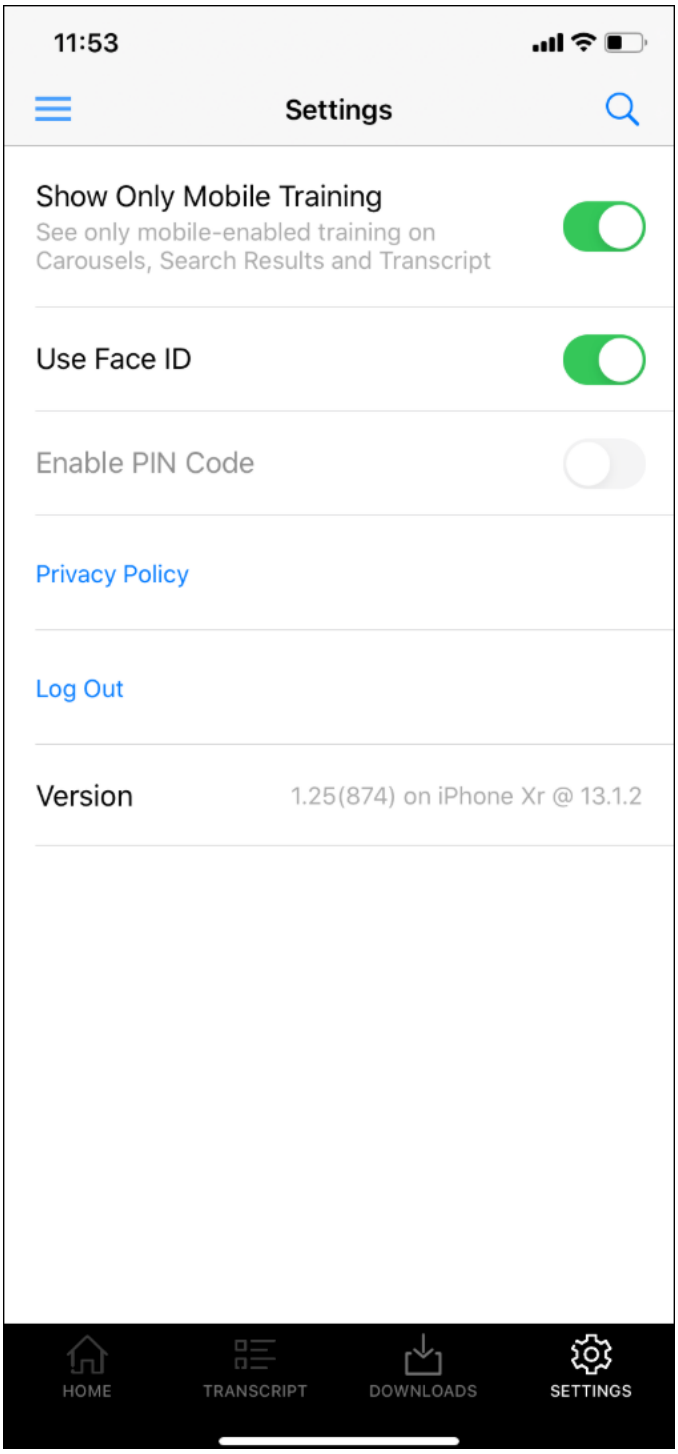
When a user opens the Cornerstone Learn app, they will first be prompted to configure biometric authentication for future logins. If they do not configure biometric authentication, the user is then prompted to configure a PIN for future logins.

Users can create a six digit PIN Code which they will be prompted for each time they log into the Cornerstone Learn app. After configuring a PIN, the user will be prompted for that PIN each time they log into the app, unless the user changes their authentication method. Login authentication settings can be changed at any time from the Settings tab of the app.



Authentication Settings

To reconfigure the authentication settings for the app at any time, the user can navigate to the Settings tab. To enable a different form of authentication, toggle the switch for that authentication type to the On position. The app will prompt the user to configure the enabled authentication type.



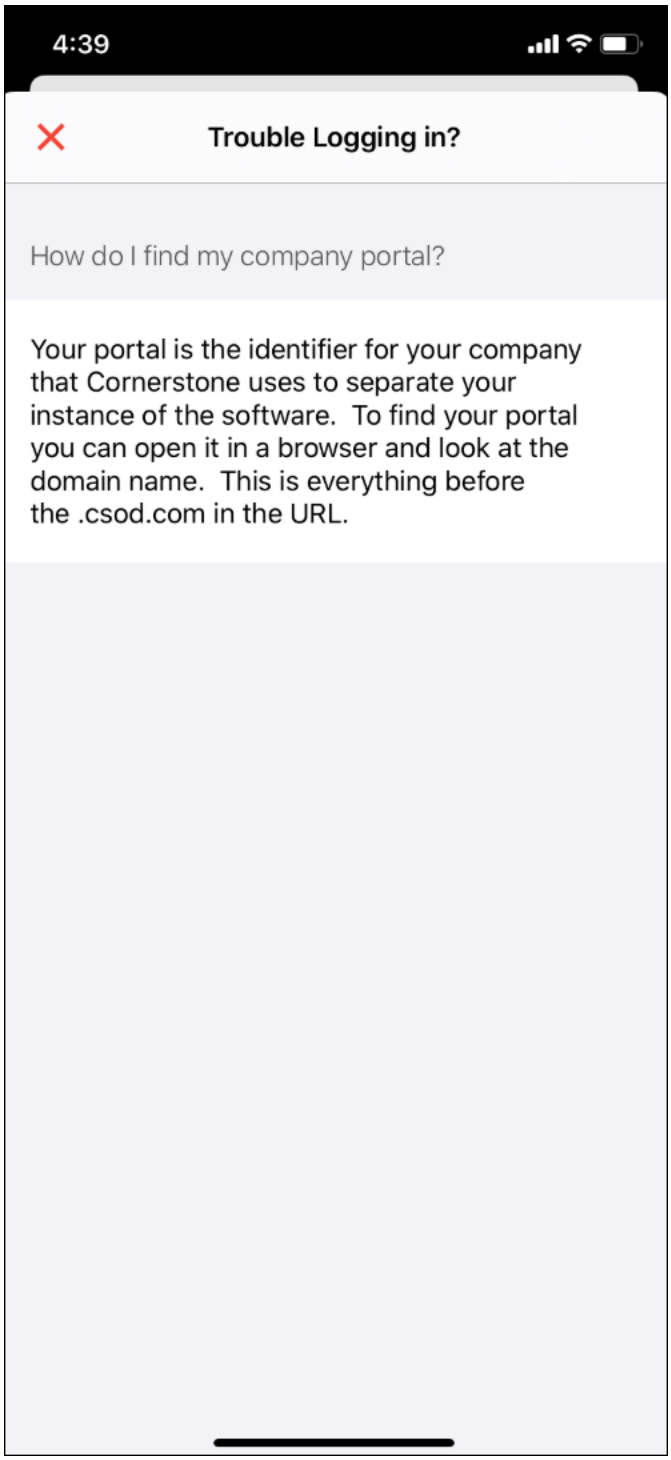
Considerations

Depending on your organization's portal and application configurations, the beginning of your users' login experiences may differ slightly. See below for details:

- For SSO Users: Upon entering a valid portal name, "smart" logic is applied during login. If a user is configured for SSO, upon tapping the **NEXT** button, the user is navigated to the SSO page.
- For Credential Users: Upon entering a valid portal name, "smart" logic is applied during login. If a user's portal has no SSO configurations, upon tapping the **NEXT** button, the user is navigated to the credentials page.
- For organizations using both SSO and credentials: Upon entering a valid portal name, users are directed to the Username page. Upon entering their username, the app checks whether the user is in an organizational unit that has SSO enabled in Mobile Preferences.
  - If YES: User is navigated to the SSO page
  - If NO: User is navigated to the Learn App password screen
- If a portal has no SSO configurations and a user taps the **Alternative Device** link, the SSO option will not appear.
- If a user is offline, the **Alternative Device** link is disabled .
- The **Alternative Device** link is in a disabled state until a valid portal name is entered.

Learn App - Help Modal

With this enhancement, additional help prompts display to users while using the app, and a new help modal has been added to the app login screen to help users navigate the login process.



Cornerstone Learn - Offline Course Deletion

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.

Implementation

This functionality is automatically available to iOS users of the Cornerstone Learn app with the Dec 6th patch. Download updates for the Cornerstone Learn app from the Apple App store.

The same functionality will tentatively be available for Android users of the Cornerstone Learn app with the February 2020 release.

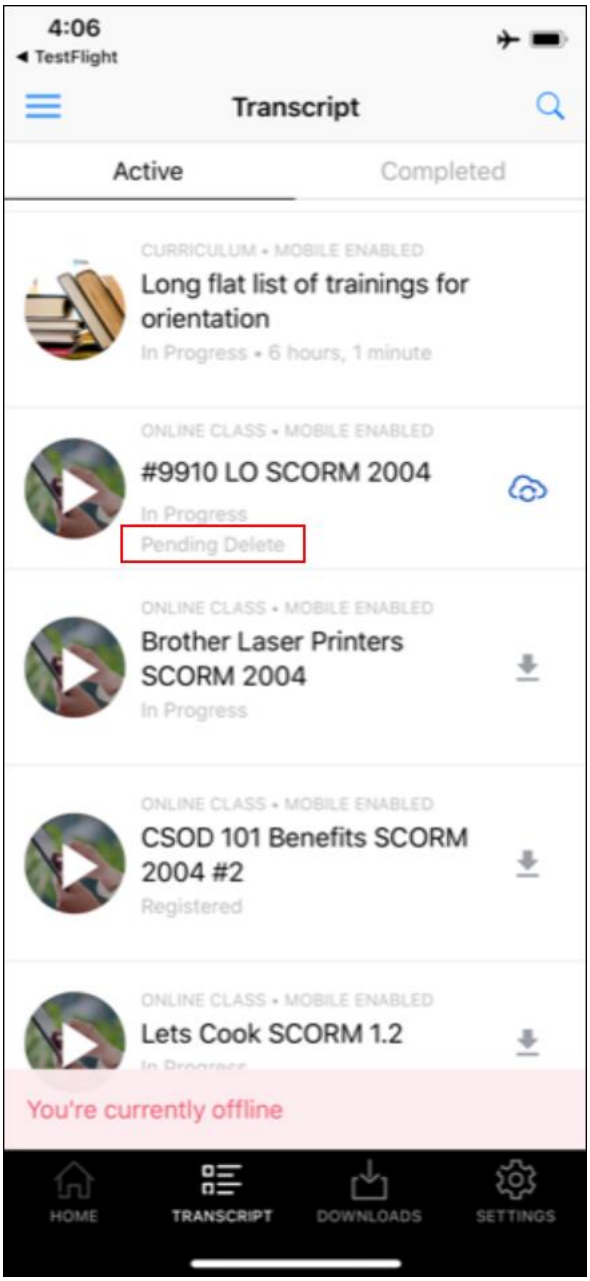
Cornerstone Learn - Delete Offline Course

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.


4:06
TestFlight
Transcript
Active
Completed
CURRICULUM • MOBILE ENABLED
Long flat list of trainings for orientation
In Progress • 6 hours, 1 minute
ONLINE CLASS • MOBILE ENABLED
#9910 LO SCORM 2004
In Progress
Pending Delete
ONLINE CLASS • MOBILE ENABLED
Brother Laser Printers SCORM 2004
In Progress
ONLINE CLASS • MOBILE ENABLED
CSOD 101 Benefits SCORM 2004 #2
Registered
ONLINE CLASS • MOBILE ENABLED
Lets Cook SCORM 1.2
You're currently offline
HOME
TRANSCRIPT
DOWNLOADS
SETTINGS

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

This functionality is not available during UAT.

Click here to access the Learning Playlists 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 - Administratio n

Cornerstone Learn App - Playlist Considerations

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

Search and Filter by Playlists

- Users can search for and filter by 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.
- Users can only search for playlists that are public.
- Search is disabled when a user is offline.

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.*

Playlist Carousel

- A new Playlist content carousel is available on the Learner Home page of the Learn app. Users can scroll through the carousel to view suggested playlists.
- The title and positioning of this carousel respects the configurations made via Learner Home Preferences.

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**.
- 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.
- 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.

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.
- In the Android version of the app, a **Playlists** link is also available. Tapping this option navigates the user to the My Playlists page.

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

Share Playlists

- Learn app users can share playlists with others using the app.
- To share a playlist, navigate to the Playlist Details page for the playlist and tap the Options drop-down. Tap the **Share** option to receive a link to the playlist which can be shared with other users.
- The **Share** option is not available when the user is offline or if the playlist is private.

Cornerstone Learn - Training Approvals

Cornerstone Learn - Training Approvals - Overview

With this enhancement, approvers with pending training approval requests can process them in the Cornerstone Learn app via a new Approvals tab in the tab drawer on an iOS device. On an Android device, users can tap a new **Approvals** link in the navigation drawer to process approval requests.

Use Case

Jon, a manager at ACME Automotive Company, has five direct reports who often request training items which have approval requirements. Jon's job requires frequent travel, so he utilizes his smartphone for emails and other work-related tasks, as he does not always have access to his laptop or desktop computer. With the Learn app, he can approve, deny, or defer these approval requests and enable his direct reports to continue learning even when he is traveling.

Considerations

- Existing Learning Management System (LMS) logic applies to approvals in the Cornerstone Learn app.
- The Learn App only displays training approvals; no other approval types are supported.

Implementation

- This functionality is available for the iOS version of the Learn app with the Feb 2020 release. Users must update their app via the Apple App Store.
- This functionality will be available for the Android version of the Learn app with a post-Feb 2020 release patch. Users must update their app via the Google Play Store.
- Push notifications will be available for both iOS and Android in a post-Feb 2020 patch. These notifications will notify users when they have outstanding approval requests in the app.

Permissions

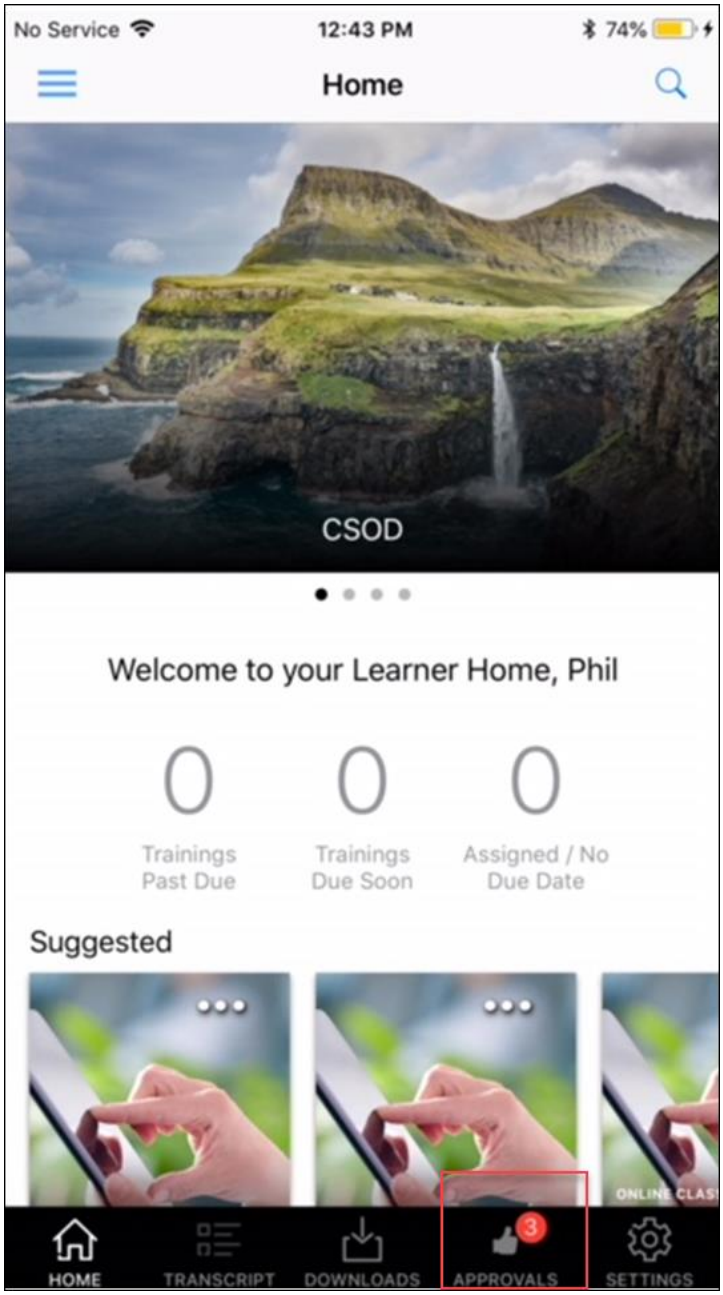
The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Approve Training by Approver	Grants ability to approve training requests of those for whom the user is the designated approver.	Learning
Approve Training by Cost Center Approver	Grants ability to approve training requests of those for whom the user is the designated cost center approver.	Learning

Approve Training by Manager	Grants ability to approve training requests of those for whom the user is the designated manager.	Learning

Cornerstone Learn - Approvals Tab (iOS)

Users with permission to manage training approval requests have access to an Approvals tab on the Cornerstone Learn app. To access the Approvals tab, tap the Approvals icon at the bottom of the app. In addition, a red notification displays on the Approvals tab with the number of outstanding approval requests that are waiting for review.



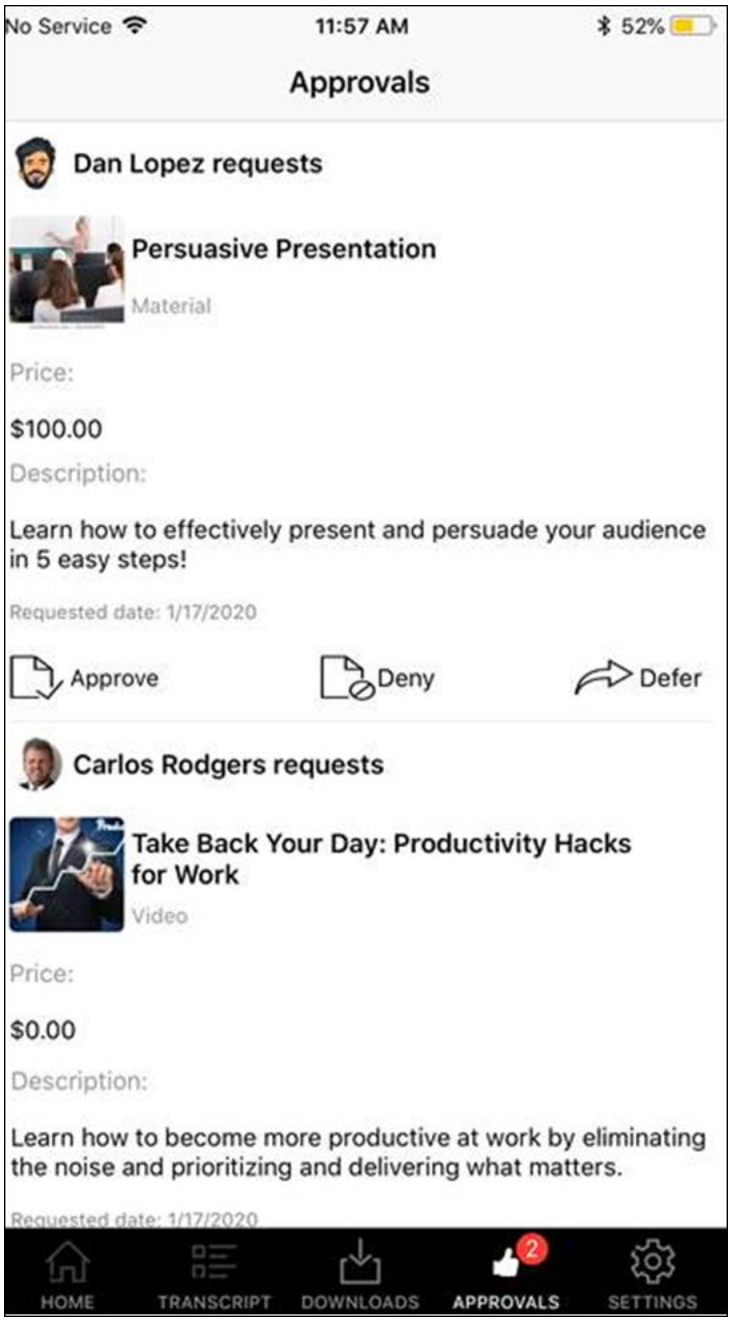
The Approval icon appears in the navigation tray at the bottom of the screen on iOS devices.

- Users only see the Approval icon if they have the relevant approval permissions.

- If a user has pending approval requests, the Approval icon is enumerated in red with the corresponding number. If a user has more than 99 approvals, 99+ displays.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Approve Training by Approver	Grants ability to approve training requests of those for whom the user is the designated approver.	Learning
Approve Training by Cost Center Approver	Grants ability to approve training requests of those for whom the user is the designated cost center approver.	Learning
Approve Training by Manager	Grants ability to approve training requests of those for whom the user is the designated manager.	Learning



Approvals

On the Approvals tab, a scrollable list of pending approval requests displays. Each approval request displays with the following information and options:

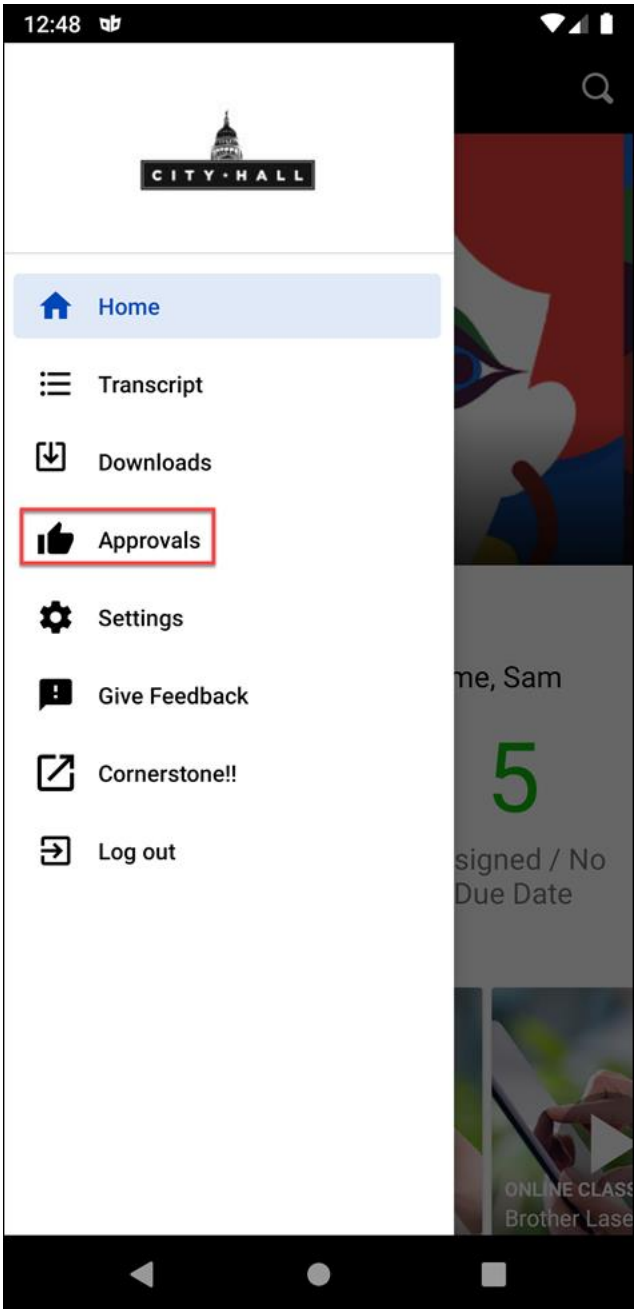
- User profile photo - The profile photo of the user who made the request, or the default profile photo image if the user has not configured a profile photo
- User full name - The user's first and last name
- Training thumbnail image - The thumbnail image associated with the requested training item
- Training title - The title of the requested training item

- Training type - The type of training that was requested (i.e. online course, material, curriculum, etc.)
- Price - The price of the training, if applicable
- Training Purpose - The training purpose associated with the requested training, if applicable
- Description - The first four lines of the training description display in plain text. If the description is longer, it will be truncated. Approvers can tap the description and be navigated to the Training Details page of the training, where they can read the full description.
- Requested Date - The date on which the user requested the training item
- Request Management Options - The following options are available for each approval request:
    - **Approve** - Tap the **Approve** option to approve the request. The user can then register for and take the training.
    - **Deny** - Tap the **Deny** option to deny the request. The user will not be able to register for or take the training.
    - **Defer** - Tap the **Defer** option to defer the request. If the approver defers the request, the next approver in the workflow will receive the approval request.

After tapping a request management option, a **Comment** field appears, allowing the approver to provide an optional comment explaining their decision, if needed. Comments display in the Approval History section on the Training Details page of the user's transcript.

Cornerstone Learn - Approvals Tab (Android)

Users with permission to manage training approval requests have access to an Approvals tab on the Cornerstone Learn app. To access the Approvals tab, tap the Approvals icon at the bottom of the app. In addition, a red notification displays on the Approvals tab with the number of outstanding approval requests that are waiting for review.



The **Approval** link appears in the navigation drawer on Android devices.

- Users will only see the **Approval** link if they have the relevant approval permissions

- If a user has pending approval requests, the **Approval** link in the navigation drawer displays with the corresponding number in parenthesis. If a user has more than 99 approvals, 99+ displays.
- When a user is offline, the Approvals link is disabled.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Approve Training by Approver	Grants ability to approve training requests of those for whom the user is the designated approver.	Learning
Approve Training by Cost Center Approver	Grants ability to approve training requests of those for whom the user is the designated cost center approver.	Learning
Approve Training by Manager	Grants ability to approve training requests of those for whom the user is the designated manager.	Learning

Approvals

On the Approvals tab, a scrollable list of pending approval requests displays. Each approval request displays with the following information and options:

- User profile photo - The profile photo of the user who made the request, or the default profile photo image if the user has not configured a profile photo
- User full name - The user's first and last name
- Training thumbnail image - The thumbnail image associated with the requested training item
- Training title - The title of the requested training item
- Training type - The type of training that was requested (i.e. online course, material, curriculum, etc.)
- Price - The price of the training, if applicable
- Training Purpose - The training purpose associated with the requested training, if applicable
- Description - The first four lines of the training description display in plain text. If the description is longer, it will be truncated. Approvers can tap the description and be navigated to the Training Details page of the training, where they can read the full description.
- Requested Date - The date on which the user requested the training item
- Request Management Options - The following options are available for each approval request:
    - **Approve** - Tap the **Approve** option to approve the request. The user can then register for and take the training.

- **Deny** - Tap the **Deny** option to deny the request. The user will not be able to register for or take the training.
- **Defer** - Tap the **Defer** option to defer the request. If the approver defers the request, the next approver in the workflow will receive the approval request.

After tapping a request management option, a **Comment** field appears, allowing the approver to provide an optional comment explaining their decision, if needed. Comments display in the Approval History section on the Training Details page of the user's transcript.

Coursera for Business Integration

Coursera for Business Integration - Overview

The Cornerstone OnDemand and Coursera for business integration enables organizations to manage their Coursera content within the Cornerstone learning management system (LMS). With this integration, Coursera courses can be automatically synchronized to the LMS catalog, where they can be managed like other system training types.

The Coursera integration provides access to the following functionality:

- Catalog Synchronization
  - Automatic daily synchronization of content from Coursera to the LMS catalog (Coursera content is classified as online content in the catalog)
  - The synchronization captures all purchased content from Coursera
  - Synchronized content added to the catalog with a Provider of Coursera
  - Loaded Coursera content is mobile-ready
  - Administrators can manage loaded Coursera content in the same manner they manage other training in the LMS (e.g. set availability, set keywords, add to a curriculum, assign training to a learner)
- Content Launching
  - When a learner launches Coursera content from the LMS, they are redirected to a Coursera pop-up window to complete the training, and no login is required
  - The learner's training progress is recorded on their transcript page in the LMS
- Report Completion
  - The learner's training progress is recorded on their transcript page in the LMS
- Single Sign-On (SSO)
  - The integration supports SMAL SSO implementation (IDP). No additional integration is required to enable the Cornerstone and Coursera for Business integration.

This integration will not be available at the start of UAT. It will be made available with the Feb 7 release.

Considerations

The following considerations apply to this enhancement:

- Content disablement is required if your LMS contains existing Coursera content.
- This integration is NOT a data-feed based integration.
- If your organization has an existing integration with Coursera and would like to enable the new integration, contact both Cornerstone Global Product Support and the Coursera team to disable the existing integration.

Implementation

For organizations using the Learning module, this integration can be self-enabled via the Edge Marketplace. The Cornerstone OnDemand and Coursera for Business integration costs $5000 per year.

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 OnDemand and Coursera for Business Integration - Configure in Edge

The Cornerstone OnDemand and Coursera for Business integration can be enabled via the Edge Marketplace and configured using Edge Integrations.

To access the Edge Marketplace, go to: ADMIN > TOOLS > EDGE and click the **Marketplace** link.

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

Coursera Integration - Edge Marketplace

In the Edge Marketplace, you can find the Coursera integration by searching or browsing. To learn more about the Coursera integration or begin the enablement and configuration process, click the Coursera integration tile.

The page for the Coursera integration provides access to the following tabs for learning more about and managing the integration:

- **Vendor** - This tab provides information about the vendor that provides the integration. Here, you can view more information about Coursera.
- **Integration** - This tab provides information about the integration itself and how it can be used with the learning management system (LMS).
- **Pricing** - This tab provides information about the costs associated with the integration. ***Note:*** *The Coursera integration has an annual cost.*
- **Setup** - This tab provides information about how to configure the integration once enabled. The integration can be configured via Edge Integrations.

Coursera Integration - Edge Integrations

Once the Coursera integration has been added through the Edge Marketplace, the integration can be managed and configured from Edge Integrations. The Integrations page

for the integration provides access to setup options which the administrator can use to customize the behavior of the Coursera integration. See the Setup tab for the Coursera integration in the Edge Marketplace for more information about the configuration options available.

Coursera - Catalog Synchronization

The learning management system (LMS) course catalog is synchronized on a daily basis. New courses and course updates are communicated from Coursera to the LMS using oAuth 2.0 as the authentication protocol. Coursera courses are available within 24 hours of enabling the integration, and are classified as online content in the LMS.

- ***Note:*** *Only purchased courses are synchronized to the LMS catalog.*
- ***Note:*** *All courses are automatically defined as available for mobile consumption and can be used on the Cornerstone Learn app.*

Training Data

The Cornerstone OnDemand and Coursera for Business integration can communicate the following metadata fields to the LMS catalog:

FIELD	DESCRIPTION
ID	The unique ID of the course
Title	The course title
URL	The course URL (used to redirect users to the provider's course)
IsActive	Specifies whether the course is available in the Coursera catalog. When a course is no longer available, it is defined as inactive in the LMS catalog
Description	The description of the course
Thumbnail	The course thumbnail image
Languages	The list of available languages for the course
LastModifiedUTC	The time of the last modification made to a course (UTC)
Duration	The course duration
Subjects	The list of subjects, mapped to the LMS subject taxonomy

Subjects Mapping

Coursera's subjects are mapped to Cornerstone's Subject Taxonomy. See the table below for the list of subjects communicated to the LMS catalog as part of the integration.

SUBJECT	COURSERA DOMAINS
Business Skills	Business

SUBJECT	COURSERA DOMAINS
Technology	Computer-science, Data-science, Information-technology, Physical-science-and-engineering
Continuing Education & Certifications	Language-learning, Social-sciences, Math-and-logic
Health & Wellness	Life-sciences
Personal Development	Personal-development
Creative	Arts-and-humanities

View Courses Loaded to the Course Catalog

To view courses which have been loaded to the Course Catalog using the integration:

1. Navigate to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link.
2. Click the **Refine your search** link on the Course Catalog search page.
3. Click the **Provider** filter and choose the Coursera provider as the filter.
4. Click the **SEARCH** button. The courses that are returned in the search are courses that were loaded via the integration.

Learner Progress Data

When a learner completes a training item, their training completion is automatically recorded on their LMS transcript. Training progress data is communicated by the User Progress API, protected by the oAuth 2.0 protocol.

The following data is communicated to Coursera when learners launch Coursera courses:

PARAMETER	DESCRIPTION
userGuid	The user's identifier in the LMS
sessionToken	The current session token that is used to authenticate the call to the LMS when Basic Access Authentication is used
callbackUrl	The Progress API callback path
subdomain	Cornerstone's portal name. Example: company.csod.com
registrationNumber	The current user registration number

The following data is communicated back from Coursera:

JSON VALUE	DESCRIPTION
userGuid	The userGuid the LMS communicated when launching the course
courseId	The unique ID of the course
status	Shows whether the course is in a status of In Progress or Completed
userScore	Shows the course score between 0 and 100
totalTime	The total time the user spent viewing the course (HHHH:MM:SS)
timesAccessed	The number of times accessed (total). Minimum value: 1
completionDate	The date and time the course was completed
lastTimeAccessed	The last date and time the user accessed the course
successStatus	Indicates whether the user passed or failed the course
bookmark	The last location the user reached in the content file
suspendData	Additional user experience data
progress	The percentage of a course the user completed (integer between 0 and 100)
registrationDate	The date and time the user was registered for the course

Online content metadata can be edited via the Course Catalog. The following fields may be overridden when Coursera sends course updates:

- Course Title
- Course Description
- Duration
- Available Languages
- Thumbnail
- Subjects (Only Coursera subjects are overridden. Subjects added by the administrator are not affected)

Considerations

- Only courses launched from the LMS can be tracked by the integration.
- Custom fields are defined with an empty value for Coursera courses.

- A notification appears at the top of Coursera courses on the Course Console page, alerting the administrator that it is external content which may be updated via automatic synchronization, and manual changes may be overridden.
- The **ACTIVE** button is disabled for Coursera courses and can be only edited by Coursera via catalog synchronization
- This integration supports SMAL SSO implementation (IDP). No additional integration is required to enable the Cornerstone and Coursera for Business integration, because the following process is implemented:
    - Security Assertion Markup Language (SAML) metadata is exchanged and set up in advance to establish the trust relationship between the LMS and Coursera.
    - The learner launches the course from their LMS portal.
    - The learner is then redirected to either the course URL or the LMS's outbound SSO endpoint.

Curriculum Versioning Enhancements

Curriculum Versioning Enhancements - Overview

With the February 2020 release, the following enhancements have been 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.

This enhancement was made available on Jan 23 2020.

Note: *This project is part of the larger multi-release Learning Compliance Scalability Initiative. The release of this project concludes the Learning Compliance Scalability Initiative.*

Click here to access the Learning Compliance Starter Guide!

Implementation

This functionality is auto-enabled in Stage. Pilot and Production will be opt-in using Learning Feature Activation Preferences. Administrators should test this functionality in Stage before enabling 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 widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission also allows	Learning - Administratio n

	administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	
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 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.	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

Feature Activation

Between now and the August 2020 release, the curriculum compliance features included in this enhancement can be activated via the Learning Feature Activation Preferences page. With the August 2020 release, all portals will be automatically upgraded to these features without need for manual activation from this page.

Important: Thoroughly test these features in Stage before activating these features in Production or before your Production portal is auto-upgraded in August 2020. 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.

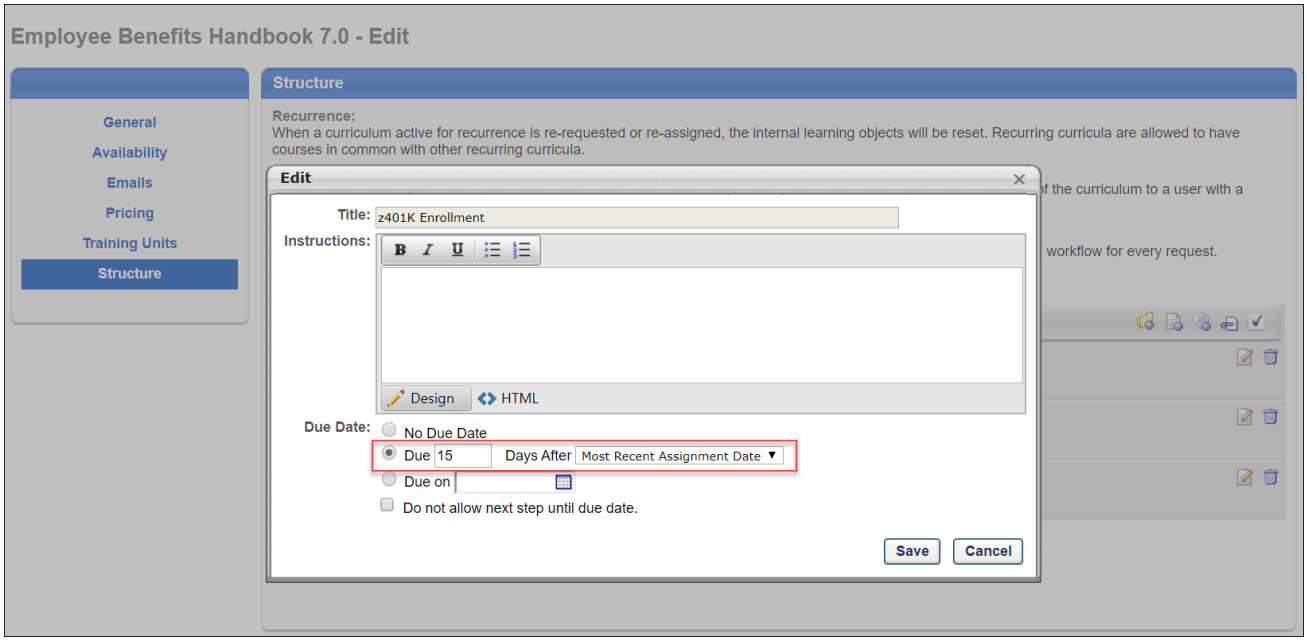
After the feature has been activated, the orange header for the section turns green to indicate the activation was successful. The **ACTIVATE** button is no longer available once the feature has been activated.

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.



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 Modification History Page** on page 233 *for additional information.*

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 reversioned 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

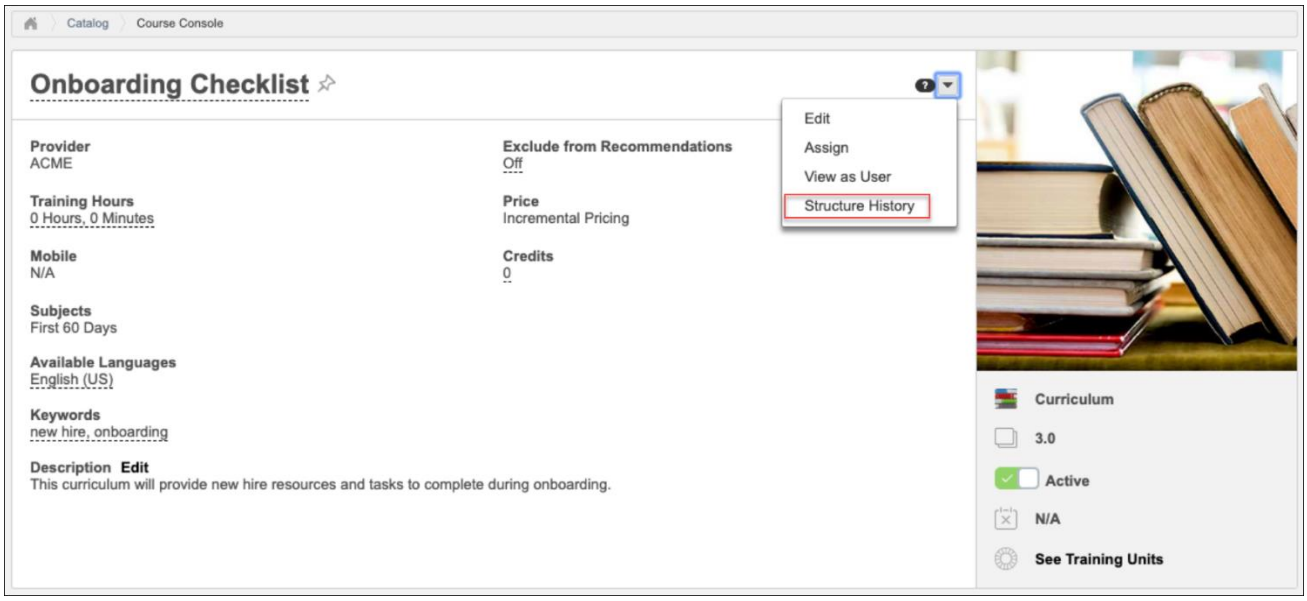
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests 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 **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	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 Console (in conjunction with the Learning Admin Console - View permission). This permission can be	Learning - Administration

	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.	

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

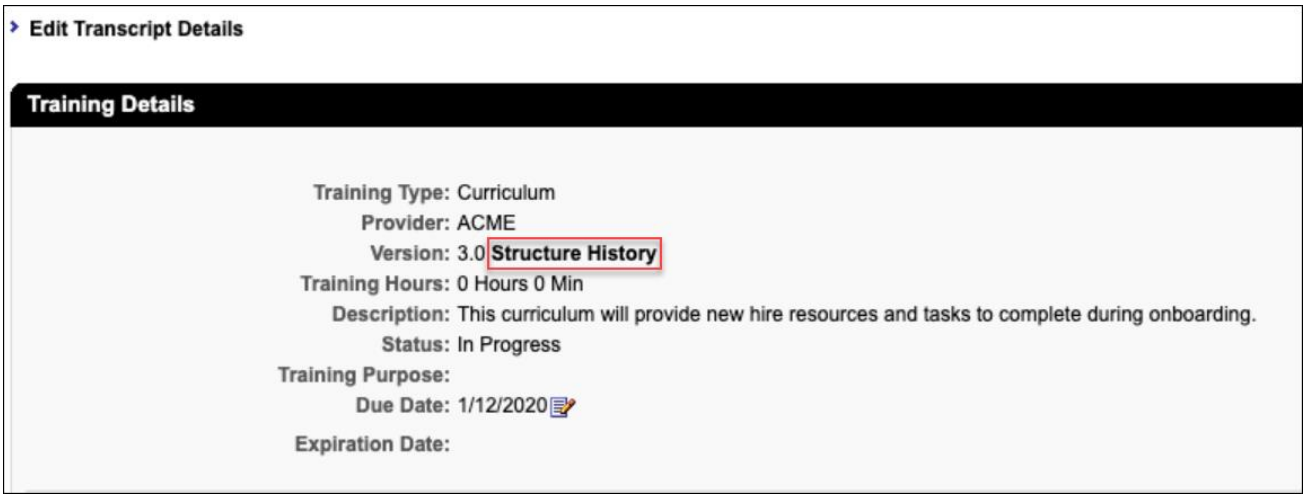
Structure History from Course Console

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.



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

Create Tool - Remix Grovo Courses

Create Tool - Remix Grovo Courses - Overview

With this enhancement, organizations can remix the Grovo courses included in content packages they have purchased. Organizations which have purchased Content Anytime or any other partial content package which includes Grovo courses will be able to remix the Grovo courses within that package using the Create Tool.

Considerations

Organizations which have already purchased the Grovo Full Library are not impacted by this enhancement, as remixing Grovo courses is already possible when using the Grovo Full Library and the Create Tool.

Implementation

In order to remix Grovo courses using the Create Tool, your organization must have purchased both the Create Tool and a content package containing Grovo courses.

Depending on your organization's feature and content purchases, your organization may or may not be impacted by this enhancement. To determine whether your organization is impacted by this enhancement, please see the chart below:

PURCHASED CREATE TOOL?	CONTENT PACKAGE	IMPACTED BY RELEASE?	EXPLANATION
Yes	Grovo Full Library	No	Organizations with the Create Tool and the Grovo Full Library already have the ability to remix Grovo courses.
Yes	Grovo Partial Library	Yes	It was not previously possible for organizations with the Create Tool and the Grovo Partial Library to remix Grovo courses, but it is now possible for them to remix purchased Grovo courses with this release.
Yes	Content Anytime	Yes	It was not previously possible for organizations with the Create Tool and Content to remix Grovo courses, but it is now possible for them to remix purchased Grovo courses with this release.
Yes	No Grovo content	No	Organizations that have not purchased Grovo content are not impacted by this enhancement. Only purchased Grovo content can be remixed.

PURCHASED CREATE TOOL?	CONTENT PACKAGE	IMPACTED BY RELEASE?	EXPLANATION
No	Grovo Full Library	No	Organizations that have not purchased the Create Tool are not impacted by this release and cannot remix Grovo content.
No	Grovo Partial Library	No	Organizations that have not purchased the Create Tool are not impacted by this release and cannot remix Grovo content.
No	Content Anytime	No	Organizations that have not purchased the Create Tool are not impacted by this release and cannot remix Grovo content.
No	No Grovo Content	No	Organizations that have not purchased Grovo content are not impacted by this enhancement. Only purchased Grovo content can be remixed.

Permissions

The following existing permission applies to this functionality:

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

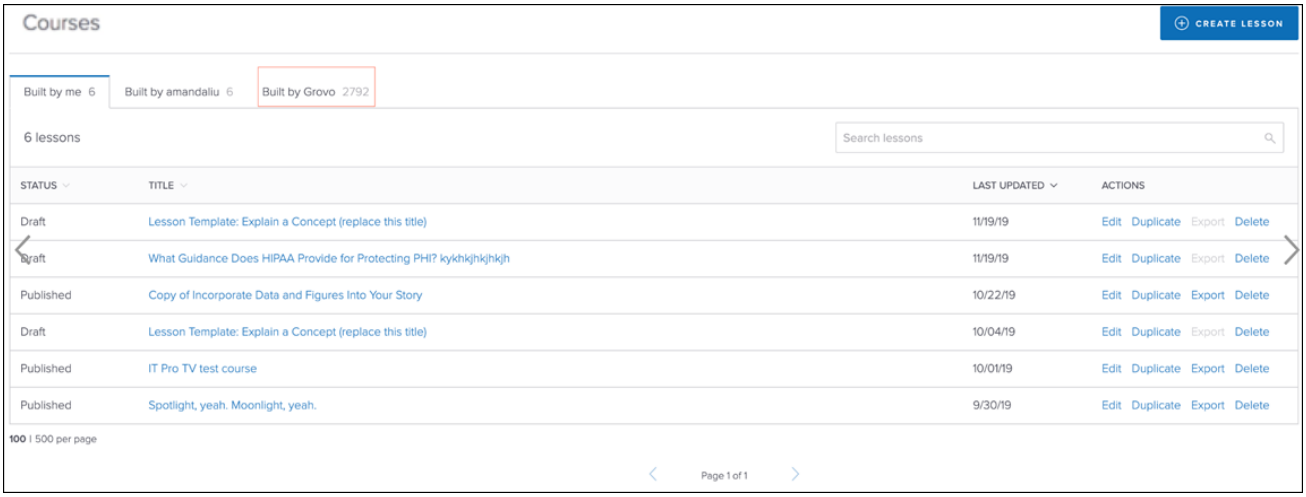
Grovo Remix - Built by Grovo

If your organization has purchased the Create Tool and also a content package which includes Grovo courses, the purchased Grovo courses display on the Built by Grovo tab on the Lessons page of the Create Tool.

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



Any Grovo courses your organization has purchased can be managed and remixed from the Build by Grovo tab. If you are interested in purchasing Grovo content, please contact your Client Executive for pricing.

FAQ

Q: How long will it take to see changes in the Create Tool after a client purchases a new content package that includes more Grovo courses?

A: The courses visible in Create Tool will be updated within 24 hours.

Q: What will happen to an organization's course access in the Create Tool if they downgrade their content package?

A: If an organization chooses to downgrade their content package from the full Grovo library to a partial library or no content package at all, they will retain access to their previously remixed course content. Courses visible in the Built by Grovo tab will be updated accordingly to match the their content subscription within 24 hours.

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.

Deprecation of Volunteer Management

Cornerstone is deprecating Volunteer Management functionality with the February ’20 release, and has ended support for Volunteer Management. Once deprecated, access to the Volunteer Management user interface, including reporting, will no longer be available in client portals. Deprecation will occur in Stage at the start of UAT and in other environments with the February ’20 Release.

DMS Course Codes

DMS Course Codes

If course code functionality is enabled and active in a portal, course codes are automatically generated when new learning objects (LOs) are created. However, prior to this enhancement, this functionality only applied to training created through the user interface (UI). Creating or versioning a material using DMS did not offer the option to generate a course code, meaning portals that use DMS may have some materials with associated course codes and other materials without associated course codes.

With this enhancement, any portal using a DMS integration can automatically generate course codes when materials are created or versioned through DMS. If the existing course code preference is enabled, any materials created or versioned through DMS will also be associated with a course code.

Use Case

Gia, a learning administrator for ACME Corp, uses course codes to manage training in ACME's portal. ACME also uses a DMS integration to create, version, and manage materials. Because course code functionality is enabled in ACME's portal, all of ACME's materials are associated with a course code upon creation or versioning through DMS, and Gia can easily manage ACME's training catalog.

Implementation

The existing preference for course codes must be enabled in the portal for DMS materials to receive course codes upon creation and versioning. This functionality will be available in Stage portals on Jan 28 2020 and will be available in Production portals on the Feb 7 2020 release. This enhancement only applies to portals using a DMS integration.

For information about enabling preferences for course codes: *See* **Course Code Preferences** on page 245 *for additional information.*

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Code -Edit	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Course Code - Manage	Grants ability to access and manage the Course Code Preferences. This is an administrator permission.	Learning - Administration

Course Code - View	Grants ability to view Training Course Codes. This is an administrator permission.	Learning - Administration

Learning Preferences	Grant access to Learning Preferences. This permission must be combined with other permissions in order for specific preference links to appear. This is an administrator permission.	Learning - Administration

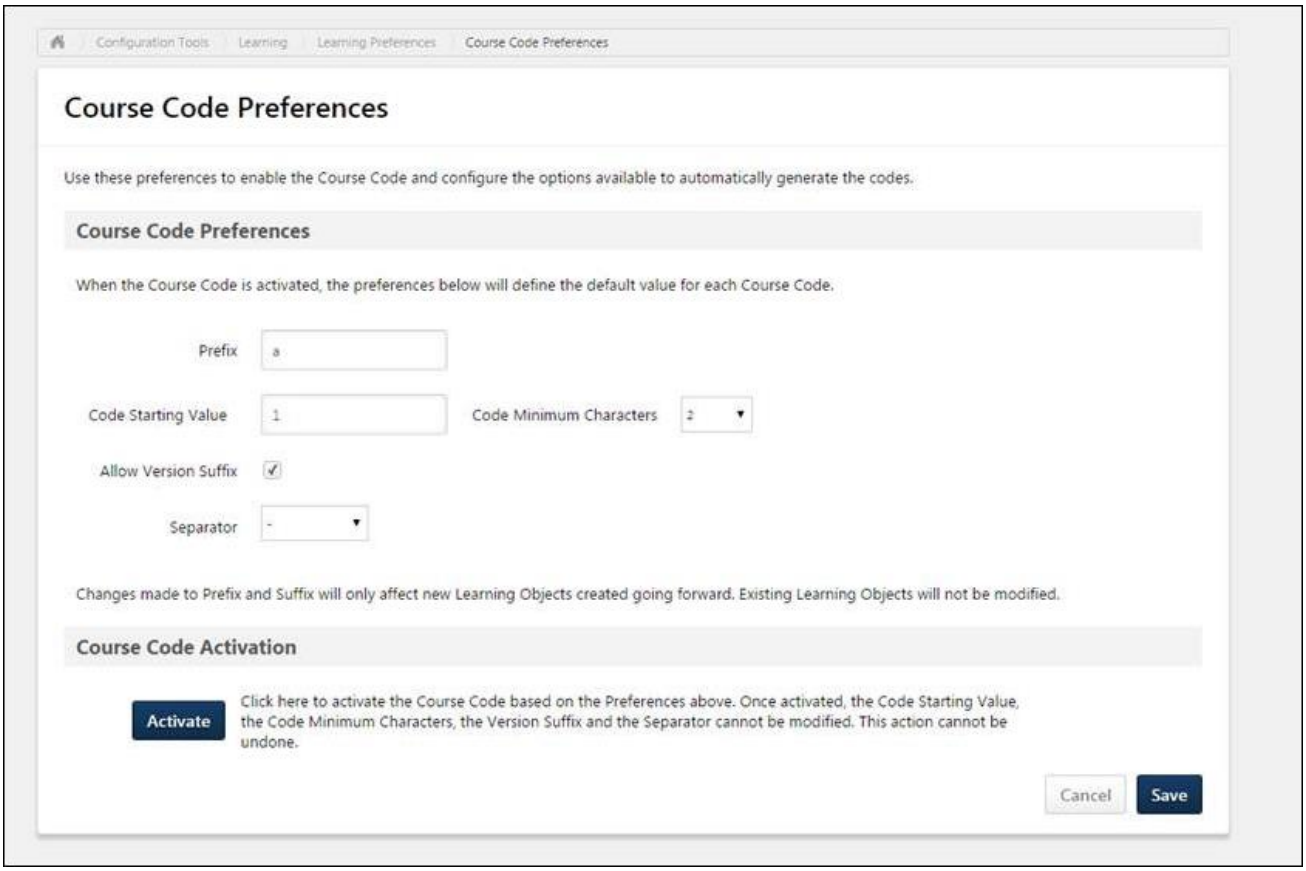
Course Code Preferences

Enabling course codes in your portal allows the system to auto-generate unique learning object (LO) IDs, which makes organizing and searching for training easier. Course Code Preferences can be set by administrators with the appropriate permissions. Once set, most course code configurations for a portal cannot be modified.

To set course code preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES, and click the **Course Code** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Code -Edit	Grants ability to edit Training Course Codes. This is an administrator permission.	Learning - Administration
Course Code - Manage	Grants ability to access and manage the Course Code Preferences. This is an administrator permission.	Learning - Administration
Course Code - View	Grants ability to view Training Course Codes. This is an administrator permission.	Learning - Administration
Learning Preferences	Grant access to Learning Preferences. This permission must be combined with other permissions in order for specific preference links to appear. This is an administrator permission.	Learning - Administration



Course Code Preferences

The Course Code Preferences section allows administrators to configure the format that the system will use to automatically generate course codes for LOs. Administrators may configure the following fields:

- **Prefix** - Administrators may specify the course code prefix for their portal in Course Code Preferences, to ensure the course code naming convention aligns with their company's organization standards. Set a course code prefix for the portal by entering up to 20 alphanumeric and special characters into the optional **Prefix** field, which is blank by default. ***Note:*** *Spaces are not allowed at the beginning or end of the prefix.*
- **Course Code Starting Value** - Enter the course code number that the system should begin with when course codes are activated in the portal. This field allows administrators to continue the course code naming convention used in a previous Learning Management System. This field is limited to 10 characters.
- **Code Minimum Characters** - From this drop-down menu, select the minimum number of characters each auto-generated course code must contain (E.g. If the starting value is 123 and the **Code Minimum Characters** field is set to 6, the auto-generated course code is 000123).
- **Allow Version Suffix** - Administrators can determine whether or not a version suffix is included in the course code, which causes the system to add a version number after the course code for all LOs that can be reversioned (i.e. Online Courses, Tests, Curricula, and Materials). This optional field is not selected by default. Check the **Allow Version**

Suffix field to include the version number in the suffix of course codes for versionable LOs.

- **Separator** - If needed, the administrator can opt to include a separator in the course code formula, which can help maintain consistency when importing training from an old system to the Cornerstone system. This field is optional, and no separator is selected by default. If separator has already been used while loading course codes prior to the feature activation by GTS, a validation message displays that reads, "Separator is already used and must be [X]."

To include a separator between the prefix, code, and suffix of a course code, select a character from the **Separator** drop-down menu. Available options include:

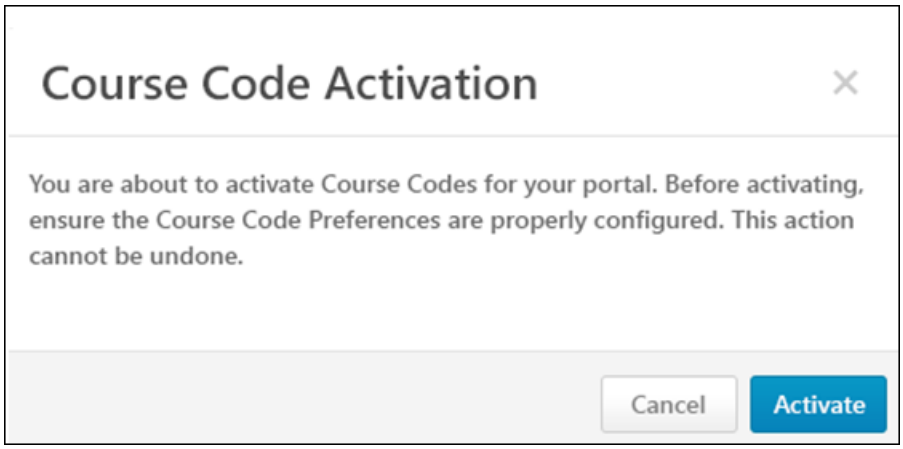
- None
- :
- -
- _
- /
- \
- .

Note: *Once the course code has been activated in the portal by an administrator, the* **Code Starting Value***,* **Code Minimum Characters***,* **Version Suffix***, and* **Separator** *options are no longer editable. If a change must be made, this can only be done via work order.*

Course Code Activation

The administrator can finalize the course code preferences they have selected and start auto-generating course codes in the portal by clicking the **ACTIVATE** button. Activating the course code preferences prohibits all administrators from making changes to the **Code Starting Value**, **Code Minimum Characters**, **Version Suffix**, and **Separator**. To activate course codes in your portal:

- Check to ensure all course code preferences have been set as desired. Once course codes are activated, no changes may be made to course code preferences. Click the **ACTIVATE** button in the Course Code Activation section.
- A pop-up window appears, stating, “You are about to activate Course Codes for your portal. Before activating, ensure the Course Code Preferences are properly configured. This action cannot be undone.” Below this message, there are two options: **ACTIVATE** and **CANCEL**. Click the **ACTIVATE** button to finalize course code preferences and make course codes active in your portal.
- The system will redirect you to the Learning Preferences page. If you access the Course Code Preferences page again, the preference fields on the page will no longer be editable.



Cancel

To discard any changes made to the Course Code Preferences page without saving and without activating course codes in the portal, click **CANCEL**. ***Note:*** *Once course codes have been activated, changes made to the Course Code Preferences page may not be canceled.*

Save

To save any changes made to the Course Code Preferences page, click **SAVE**. ***Note:*** *Saving changes made to the Course Code Preferences page does not automatically activate course codes in the portal.*

Course Code Auto-Generation

When an administrator creates and saves a new LO in a portal with active course code preferences, an alpha-numeric LO ID code is automatically generated for the LO. This code adheres to the preferences set in Course Code Preferences, and no duplicate codes can be generated. Course codes are automatically generated for the following LO types:

- Certifications
- Curricula
- Events and Sessions
- Materials (including DMS materials)
- Online Courses
- Programs and Cohorts
- Tests
- Videos

Note: *The course codes generated for learning objects are not visible to the administrator. Course codes are generated on the backend.*

Copy Learning Object with Course Code

If an administrator copies an existing learning object which supports course codes, a new course code is automatically generated for the LO copy. The course code generated for the copied LO will be unique. Duplicate course codes CANNOT be generated.

eDX for Business Integration

edX for Business Integration - Overview

The Cornerstone on Demand (CSOD) and edX for Business integration enables organizations to manage their edX content within the Cornerstone learning management system (LMS). With this integration, edX courses can be automatically synchronized to the LMS catalog, where they can be managed like other system training types.

The edX integration provides access to the following functionality:

- Catalog Synchronization
  - Automatic daily synchronization of content from edX to the LMS catalog (edX content is classified as online content in the catalog)
  - The synchronization captures all purchased content from edX
  - Synchronized content added to the catalog with a Provider of edX
  - Loaded edX content is mobile-ready
  - Administrators can manage loaded edX content in the same manner they manage other training in the LMS (e.g. set availability, set keywords, add to a curriculum, assign training to a learner)
- Content Launching
  - When a learner launches edX content from the LMS, they are redirected to an edX pop-up window to complete the training, and no login is required
  - The learner's training progress is recorded on the their transcript page in the LMS
- Report Completion
  - The learner's training progress is recorded on the their transcript page in the LMS
- Single Sign-On (SSO)
  - The integration supports SMAL SSO implementation (IDP). No additional integration is required to enable the Cornerstone and edX for Business integration

Considerations

The following considerations apply to this enhancement:

- Content disablement is required if your LMS contains existing edX content.
- This integration is NOT a data-feed based integration.
- If your organization has an existing integration with edX and would like to enable the new integration, contact both Cornerstone Global Product Support and the edX team to disable the existing integration.

Implementation

For organizations using the Learning module, this integration can be self-enabled via the Edge Marketplace. The Cornerstone OnDemand edX for Business integration costs $5000 per year.

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 OnDemand and edX for Business Integration - Enable in Edge

The Cornerstone OnDemand and edX for Business integration can be enabled via the Edge Marketplace and configured using Edge Integrations.

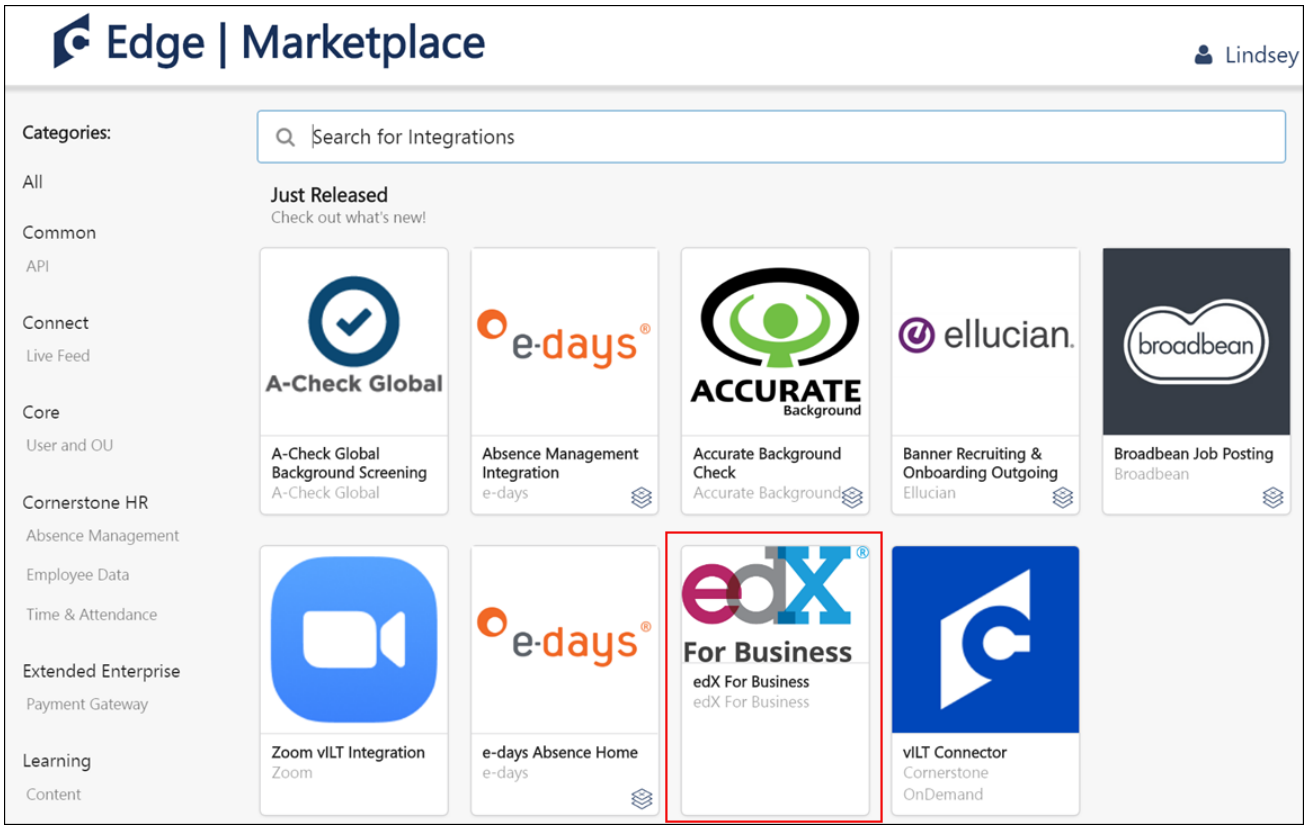
To access the Edge Marketplace, go to: ADMIN > TOOLS > EDGE and click the **Marketplace** link.

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

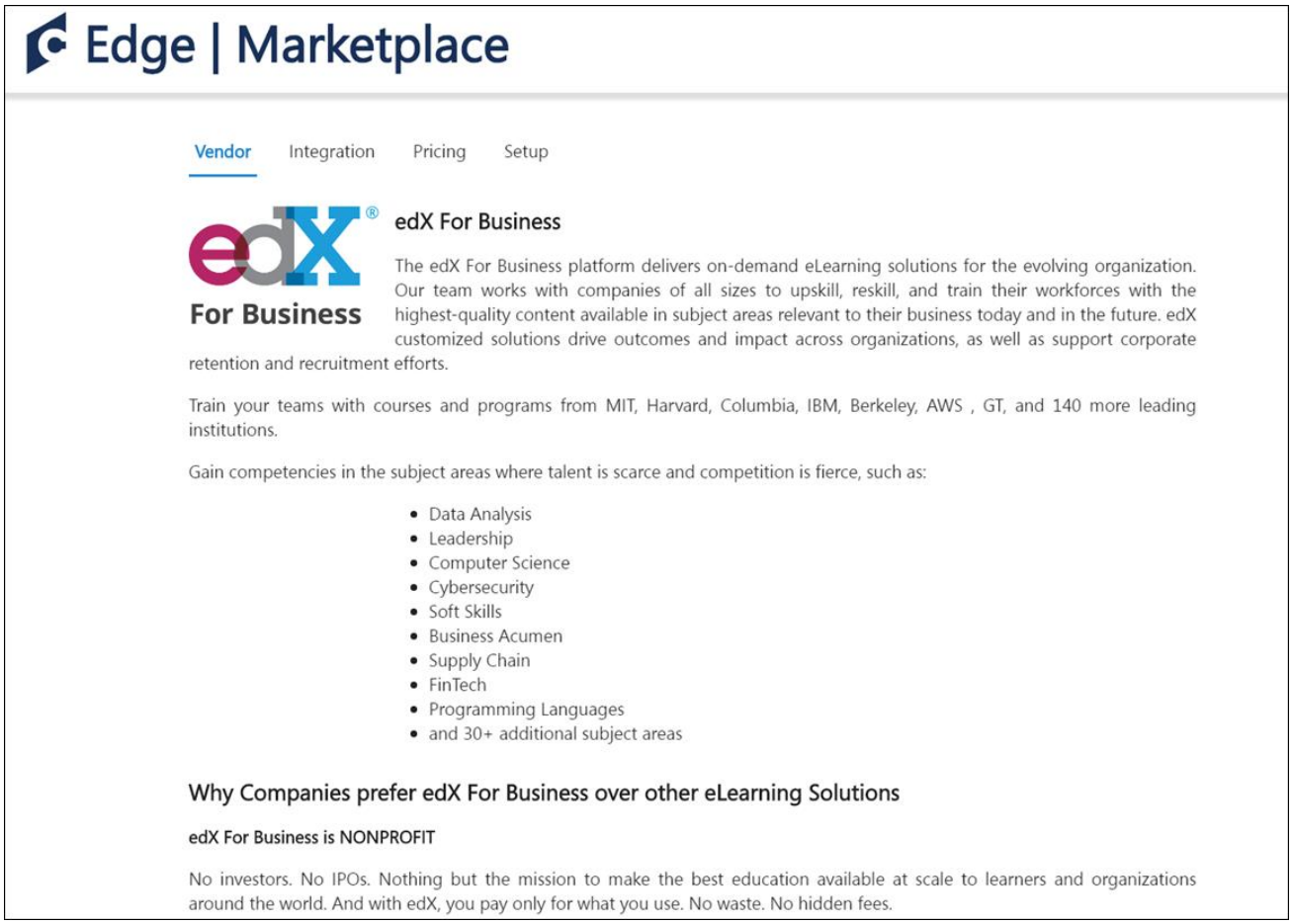
edX Integration - Edge Marketplace

In the Edge Marketplace, you can find the edX integration by searching or browsing. To learn more about the edX integration or begin the enablement and configuration process, click the edX integration tile.



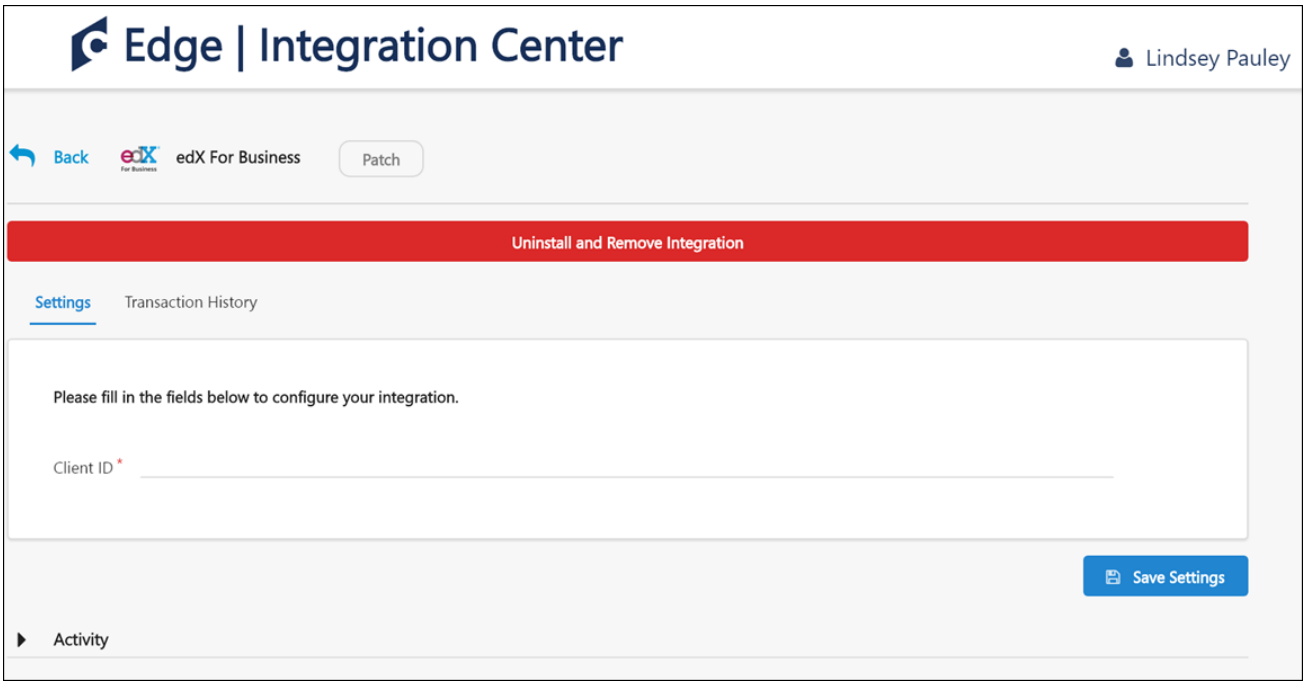
The page for the edX integration provides access to the following tabs for learning more about and managing the integration:

- **Vendor** - This tab provides information about the vendor that provides the integration. Here, you can view more information about edX.
- **Integration** - This tab provides information about the integration itself and how it can be used with the learning management system (LMS).
- **Pricing** - This tab provides information about the costs associated with the integration. ***Note:*** *The edX integration costs $5000 annually.*
- **Setup** - This tab provides information about how to configure the integration once enabled. The integration can be configured via Edge Integrations.



edX Integration - Edge Integrations

Once the edX integration has been added through the Edge Marketplace, the integration can be managed and configured from Edge Integrations. The Integrations page for the integration provides access to setup options which the administrator can use to customize the behavior of the edX integration. See the Setup tab for the edX integration in the Edge Marketplace for more information about the configuration options available.


Edge | Integration Center
Lindsey Pauley
Back
edX For Business
Patch
Uninstall and Remove Integration
Settings
Transaction History
Please fill in the fields below to configure your integration.
Client ID *
Save Settings
Activity

Cornerstone OnDemand and edX for Business Integration - Catalog Synchronization

The learning management system (LMS) course catalog is synchronized on a daily basis. New courses and course updates are communicated from edX to the LMS using oAuth 2.0 as the authentication protocol. edX courses are available within 24 hours of enabling the integration, and are classified as online content in the LMS.

- ***Note:*** *Only purchased courses are synchronized to the LMS catalog.*
- ***Note:*** *All courses are automatically defined as available for mobile consumption and can be used on the Cornerstone Learn app.*

Training Data

The Cornerstone OnDemand and edX for Business integration can communicate the following metadata fields to the LMS catalog:

FIELD	DESCRIPTION
ID	The unique ID of the course
Title	The course title
URL	The course URL (used to redirect users to the provider's course)
IsActive	Specifies whether the course is available in the edX catalog. When a course is no longer available, it is defined as inactive in the LMS catalog
Description	The description of the course
Thumbnail	The course thumbnail image
Languages	The list of available languages for the course
LastModifiedUTC	The time of the last modification made to a course (UTC)
Duration	The course duration
Subjects	The list of subjects, mapped to the LMS subject taxonomy

Online content metadata can be edited via the Course Catalog. The following fields may be overridden when edX sends course updates:

- Course Title
- Course Description
- Duration
- Available Languages

- Thumbnail
- Subjects (Only edX subjects are overridden. Subjects added by the administrator are not affected)

View Courses Loaded to the Course Catalog

To view courses which have been loaded to the Course Catalog using the integration:

1. Navigate to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link.
2. Click the **Refine your search** link on the Course Catalog search page.
3. Click the **Provider** filter and choose the edX provider as the filter.
4. Click the **SEARCH** button. The courses that are returned in the search are courses that were loaded via the integration.

Learner Progress Data

When a learner completes a training item, their training completion is automatically recorded on their LMS transcript. Training progress data is communicated by the User Progress API, protected by the provider's authentication.

The following data is communicated to edX when learners launch edX courses:

PARAMETER	DESCRIPTION
userGuid	The user's identifier in the LMS
sessionToken	The current session token that is used to authenticate the call to the LMS when Basic Access Authentication is used
callbackUrl	The Progress API callback path
subdomain	Cornerstone's portal name. Example: company.csod.com
registrationNumber	The current user registration number

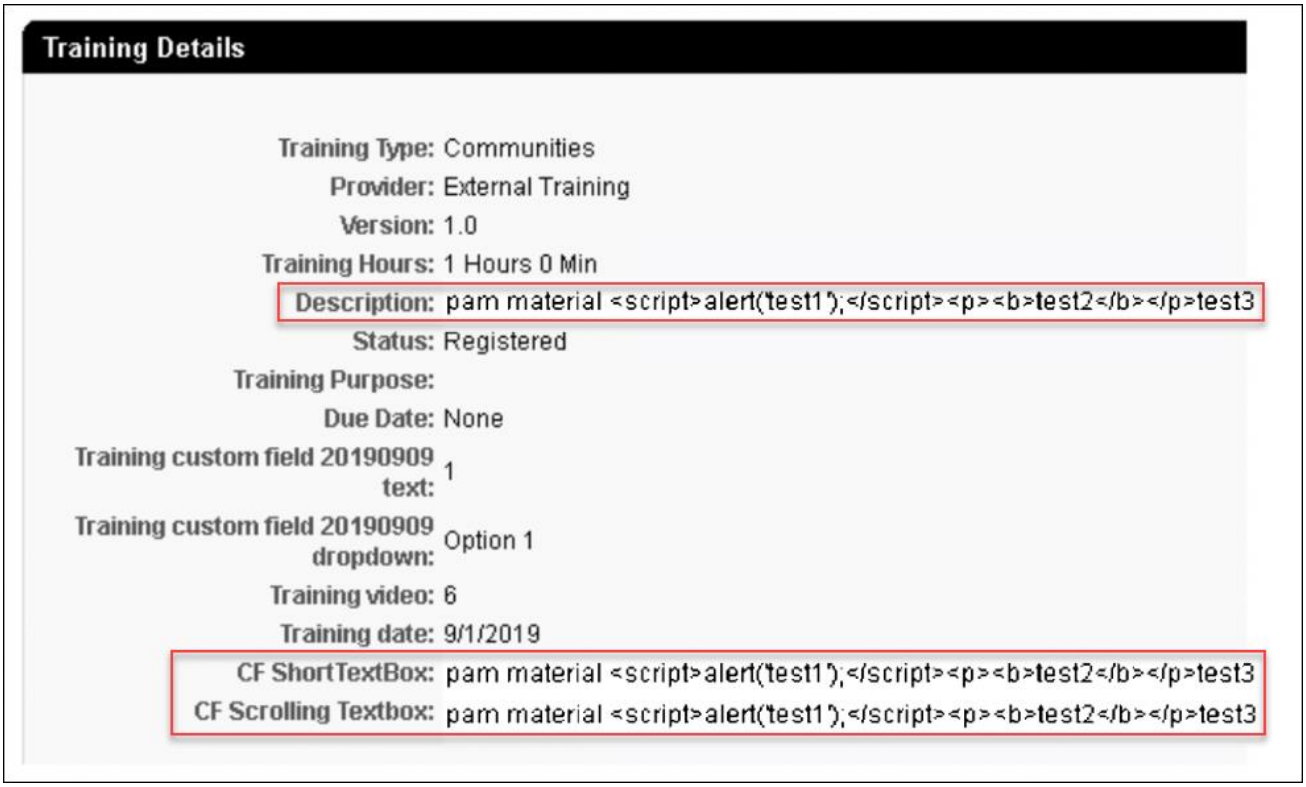
Considerations

- Only courses launched from the LMS can be tracked by the integration.
- Custom fields are defined with an empty value for edX courses.
- The **ACTIVE** button is disabled for edX courses and can be only edited by edX via catalog synchronization

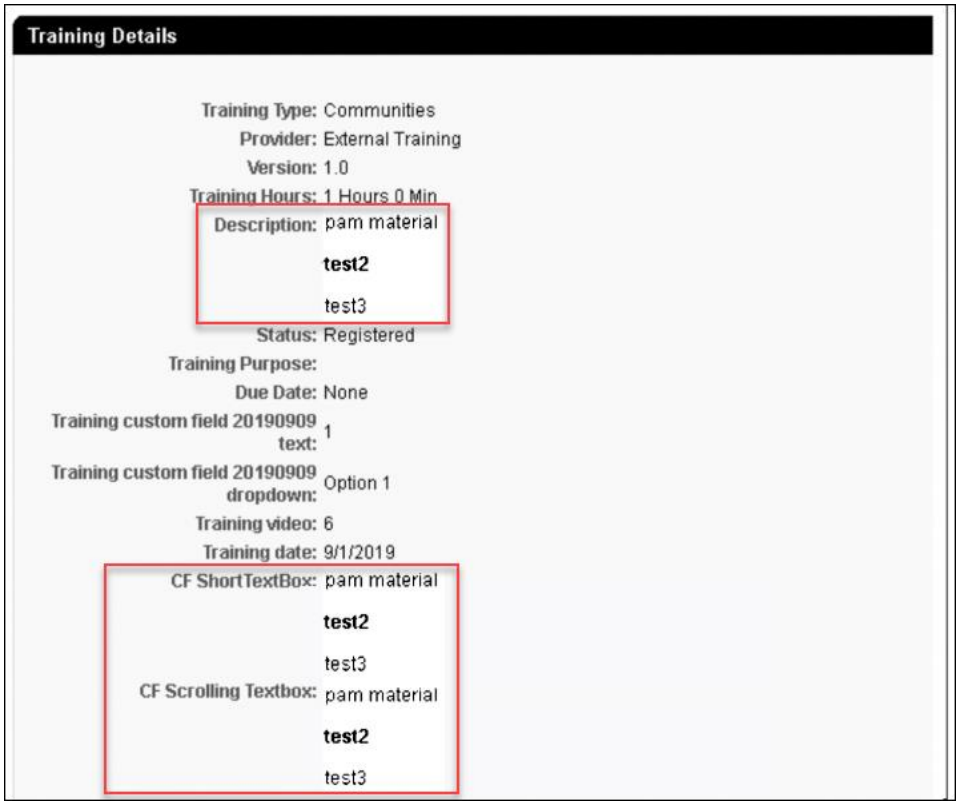
Enhanced HTML Security for Training Description and Training Custom Fields

With the February 2020 release, HTML security for training descriptions and training custom fields has been enhanced, allowing all HTML markup in these fields to be sanitized on output. This means HTML markup can be correctly formatted without presenting XSS risk. With this enhancement to HTML security, organizations no longer need to sign a waiver acknowledging the risk that previously existed for HTML markup.

HTML Text Appearance PRIOR to HTML Security Enhancement:



HTML Text Appearance WITH this HTML Security Enhancement:



Use Case

Cynthia is a Learning Administrator at ACME Corp. When creating new training items, she uses HTML markup in the training title, description, and training custom fields to improve the experience of her learners. Due to the XSS Security risk, Cynthia's company chooses to encode HTML in these fields. This allows the system to remain secure, and because the Cornerstone system sanitizes these fields on output, they can be correctly formatted for users without presenting a security risk. Cynthia is able to create a great learner experience using HTML while also maintaining the security of her users, portals, and systems.

Considerations

This functionality is automatically enabled in all portals using the Learning module. There is an existing backend setting enabled in some portals which increased security but caused training descriptions and training custom fields to be poorly formatted when they contained HTML markup. This backend setting will be retired with the August ’20 Release. Conversely, some portals have signed a security waiver to have their HTML markup appear correctly by opting out of the security this backend setting provides. There is an additional backend setting which bypasses all XSS security validations which will also interact with the new setting. This setting is not currently targeted for retirement.

Refer to the table below to determine how this enhancement affects your portal:

MY PORTAL USES THE BACKEND SETTING WHICH INCREASES SECURITY OF HTML TAGS BUT COMPROMISES CORRECT FORMATTING	MY PORTAL USES THE BACKEND SETTING WHICH BYPASSES CROSS SITE SCRIPTING (XSS) SECURITY MEASURES	IMPACT OF NEW ENHANCED HTML SECURITY FOR MY PORTAL
True	False	These portals are unaffected by this enhancement. These portals are secure and protected against XSS security risk associated with HTML and also use additional XSS security measu

MY PORTAL USES THE BACKEND SETTING WHICH INCREASES SECURITY OF HTML TAGS BUT COMPROMISES CORRECT FORMATTING	MY PORTAL USES THE BACKEND SETTING WHICH BYPASSES CROSS SITE SCRIPTING (XSS) SECURITY MEASURES	IMPACT OF NEW ENHANCED HTML SECURITY FOR MY PORTAL
		res. These portals can use HTML Markup without accepting a security risk.
False	True	These portals have opted out of security measures and are unaffected by this enhancement and the retirement of

MY PORTAL USES THE BACKEND SETTING WHICH INCREASES SECURITY OF HTML TAGS BUT COMPROMISES CORRECT FORMATTING	MY PORTAL USES THE BACKEND SETTING WHICH BYPASSES CROSS SITE SCRIPTING (XSS) SECURITY MEASURES	IMPACT OF NEW ENHANCED HTML SECURITY FOR MY PORTAL
		the existing backend setting to provide security when using HTML.
False	False	These portals are affected by this new enhancement. These portals receive increased security for their HTML

MY PORTAL USES THE BACKEND SETTING WHICH INCREASES SECURITY OF HTML TAGS BUT COMPROMISES CORRECT FORMATTING	MY PORTAL USES THE BACKEND SETTING WHICH BYPASSES CROSS SITE SCRIPTING (XSS) SECURITY MEASURES	IMPACT OF NEW ENHANCED HTML SECURITY FOR MY PORTAL
		markup.
True	True	These portals are affected by this enhancement. When the backend setting to encode training text is retired, these portals will lose the HTML security associated

MY PORTAL USES THE BACKEND SETTING WHICH INCREASES SECURITY OF HTML TAGS BUT COMPROMISES CORRECT FORMATTING	MY PORTAL USES THE BACKEND SETTING WHICH BYPASSES CROSS SITE SCRIPTING (XSS) SECURITY MEASURES	IMPACT OF NEW ENHANCED HTML SECURITY FOR MY PORTAL
		with the backend setting without gaining the security of this new enhancement. These portals must assess their configuration before the backend setting to make HTML secure is retired

MY PORTAL USES THE BACKEND SETTING WHICH INCREASES SECURITY OF HTML TAGS BUT COMPROMISES CORRECT FORMATTING	MY PORTAL USES THE BACKEND SETTING WHICH BYPASSES CROSS SITE SCRIPTING (XSS) SECURITY MEASURES	IMPACT OF NEW ENHANCED HTML SECURITY FOR MY PORTAL
		with the August ’20 Release.

External Content with Smart URLs

External Content with Smart URLs - Overview

Prior to this enhancement, end users were able to create duplicates of External Content, because the system did not check for duplicate content during the External Content creation process.

With this enhancement, the system can identify duplicate External Content using the following criteria:

- Direct URL match
- Canonical URL match
- YouTube link variety

During the External Content creation process, if the system identifies that the user is creating duplicate content, the user will be redirected to the Add From Catalog tab, where the original version of the content they were trying to add is pre-populated and can be added to the user's playlist.

Use Case

June is an administrator that has implemented external content in her organization's system, and she is worried about allowing users to add external content because she does not want users to create duplicates of popular external learning and clutter up the system's Course Catalog and training search results. However, because the system checks for duplicate links, users are redirected to existing training when they attempt to create duplicate external content. This allows June's organization to maintain Course Catalog organization.

Implementation

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

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
External Content - Create	Grants the ability to create external content. This permission can be constrained by OU or by aspects of the user. When a user creates external content, the availability is determined by the constraints of the permission. This is an end user permission.	Learning

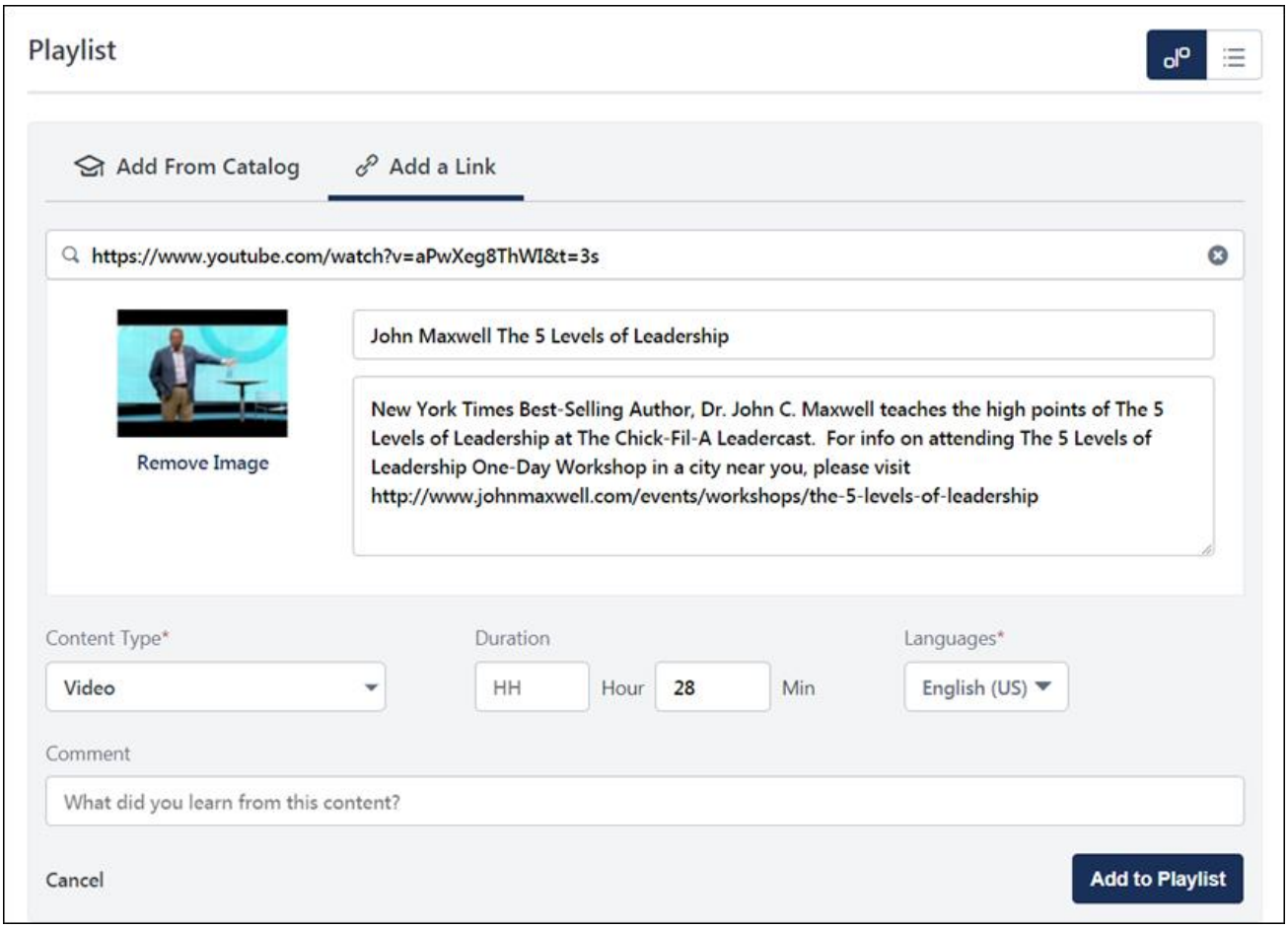
Create External Content - Stop Duplicates

With this enhancement, when a user attempts to add external content to a playlist and the system recognizes that the external content already exists in the Course Catalog, the user is instead redirected to the Add From Catalog tab, where they can instead add the existing external content to their playlist. Providing the user with quick access to the existing external content reduces the opportunity to create duplicate content.

To add external content to a playlist, go to LEARNING > PLAYLISTS. You must have permission to create playlists and the permission to create external content. Either click the **CREATE NEW** button to create a new playlist, or click the title of an existing playlist to make changes to a previously created playlist.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
External Content - Create	Grants the ability to create external content. This permission can be constrained by OU or by aspects of the user. When a user creates external content, the availability is determined by the constraints of the permission. This is an end user permission.	Learning



Duplicate Detected when Adding External Content

The workflow for a user adding external content that already exists in the system is as follows:

1. Click the External Content tab at the top of the playlist's structure. Instead of searching for training within the system, you will need to provide a link to the external content you wish to add.
2. Paste a link to the external content you wish to add into the **Paste a link to add to your playlist** field. Press the Enter key on your keyboard after entering your link. If the link is a direct URL match for another training item in the system, is a canonical URL match for another training item in the system, or the same YouTube link variety as another training item in the system, the user's new external content will be identified as a duplicate.
3. If the external content the user is attempting to create is identified as a duplicate, the user is redirected to the Add from Catalog tab, where the original version of the content they are trying to create is pre-populated from the Course Catalog. The user can enter an annotation which will display with the training item in their playlist. The **Annotations** field is limited to 300 characters.

4. Click the **ADD ITEM** button to add the training to the playlist structure. If needed, you can click the **Cancel** link to discard the training item instead. After the training has been added to the playlist, it displays as a training tile in the playlist's structure.

This process helps to prevent the creation of duplicate external content.

What is a Canonical URL Match?

A canonical URL match is a technical solution for duplicate content. For example, there might be a post or a product which is attached to two categories and exists under two URLs, such as:

- https://example.com/black-shoes/black-and-red-shoes/
- https://example.com/red-shoes/black-and-red-shoes/

If both URLs are for the same product, choosing one as the canonical URL tells search engines which URL to display in search results. Canonicals also enable you to direct search engines to the original version of an article. By referencing canonical URLs for external content, the system can help identify duplicate content.

Learning Assessments - Admin Experience (Open Beta) - Overview

With a post-February 2020 release patch, an open beta of a reimagined Test Engine is available. The redesigned experience is called Learning Assessments and is available to test in Stage portals only. This beta version of Learning Assessments does not yet have feature parity with the existing Test Engine. The following features are available with Learning Assessments:

- Assessment Creation (allows administrators to define metadata for the assessment)
- Assessment Builder (allows administrators to build the assessment structure)
- Assessment Preview
- Settings Adjustment
- Assessment Home (allows administrators to view and manage previously created assessments)

This enhancement will be available in Stage with the Feb 21 2020 patch.

Learning Assignment Tool API

A new Learning Assignment Tool public API is available via the Edge Marketplace. This public API offers flexibility when a custom solution for the Learning Assignment Tool is required by an organization. With the new Learning Assignment API, users can enjoy many of the same features that exist in the Learning Assignment Tool user interface.

This API is not available during UAT; it will be made available with the Feb 7th release.

How does this benefit my organization?

Public APIs promote extensibility and allow organizations to interface with the system and its features in ways the system itself may not currently accommodate through its front-end user interfaces. Public APIs can be used to create custom solutions by any organization using internal development resources, partners, integrators, or other third party development resources.

Exclusions

The following Learning Assignment Tool features from the system are NOT supported by the Learning Assignment Tool public API:

- Dynamic learning assignments (only standard assignments are supported)
- Custom emails and ad hoc emails
- Scheduling the assignment for the future (your organization can build a queuing system if needed)
- **Force Prerequisites** option
- **Training Start Date** option
- The API does not currently support assigning instructor-led training (ILT) events and sessions in a Completed status if they occurred in the past

Learning Assignments created using the legacy Proxy Enrollment API will display on the Manage Learning Assignments page with their source listed as: "Created with Learning Assignment Tool." Assignments created using the new Learning Assignment Tool API display with a source of "Created with API." This is because the legacy API is not capable of distinguishing whether the assignment was created via API or via the Learning Assignment Tool user interface.

Considerations

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. Cornerstone will continue to support the Proxy Enrollment API as of the October ’19 Release, but new integrations for the API will be discontinued. The Proxy Enrollment API will still be available at this time, but Cornerstone will not fix any defects or enhance this API. The documentation for this API will be removed from the Foundational APIs tile in the API Explorer after the new Learning Assignment API becomes available with the October ’19 Release.

Organizations using the Proxy Enrollment API must modify any code referencing the Proxy Enrollment API and update the code to reference the Learning Assignment Tool public API.

For more information: *See Deprecation Proxy Enrollment.*

Implementation

This public API requires the purchase of Cornerstone APIs. For organizations which have already purchased Cornerstone APIs, no additional purchase is required. A purchase inquiry for Cornerstone APIs can be submitted through the Edge Marketplace.

To access Cornerstone APIs in the Edge Marketplace, go to: ADMIN > TOOLS > EDGE and click the **Marketplace** link. Search for and click the Cornerstone API tile. Click the Setup tab for setup instructions for the API.

Additional documentation about the Learning Assignment Tool public API is available in the API Explorer. To access the API Explorer independently of a Cornerstone portal, go to: **https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/**

Permissions

The Learning Assignment API references the user's permissions, just as they are referenced for creation of an assignment via the Learning Assignment Tool in the system. The user account associated with the OAuth 2.0 application must have the required permissions to create a standard learning assignment using this API. The permissions required are listed in the API Explorer.

The following existing permission is needed to access the API Explorer from within the Cornerstone system:

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

Learning Assignment Tool Enhancement

Prior to this enhancement, a new version of a material would be assigned to users who were no longer included in a learning assignment's user criteria, because they previously had the material assigned to their transcript when they were included in the learning assignment's user criteria.

With this enhancement, this behavior has been corrected, and users who are no longer part of a learning assignment's user criteria do NOT receive an updated version of a material when the material is upgraded for the learning assignment.

Use Case

1. Sabeen is assigned Curriculum A, which contains Material A v1 via the Learning Assignment Tool.
2. Later, Sabeen moves to a job in another department and no longer meets the criteria for the learning assignment, and Curriculum A is replaced on her transcript with Curriculum B because now she is included in the assignment criteria of a new learning assignment which contains Curriculum B. Curriculum B also contains Material A v1.
3. Curriculum B is versioned as a result of Material A v1 being removed from the curriculum structure. Material A v1 is no longer contained within Curriculum B or on Sabeen's transcript.
4. Material A is versioned to v5.
5. Sabeen does NOT receive Material A v5 on her transcript, as she is not included in the assignment criteria of any learning assignment which contains Material A v5.

Implementation

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

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 February 2020 release, the Learning Details page is still in an Early Adopter status, and the following additional enhancements have been made to this feature:

- A permanent **Notify Me** link is available for sessions (implemented Nov 1 2019)
- Users can generate an exception request when a session or curriculum they are requesting has a prerequisite training item that the user has neither requested nor completed (implemented Nov 1 2019)
- Optimizations have been made to page load performance (implemented Nov 15 2019)
- A session scheduling conflict pop-up displays when a learner attempts to register for a session that conflicts with another session (implemented Dec 20 2019)
- Session registration deadlines display on the Session flyout and in the Upcoming Sessions section (implemented Jan 10 2020)
- Session rosters are accessible to instructors via the Session flyout and in the Upcoming Sessions section (implemented Jan 10 2020)
- Training contact information displays on the Session flyout for each session (implemented Jan 10 2020)
- Prices for upcoming sessions display in the Upcoming Sessions section, when applicable (implemented Feb 7 2020)

Considerations

The redesigned Learning Details page is only available for the following training types:

- Curricula
- Events and Sessions (new)
- External Content
- Materials
- Online Courses
- Online Content
- Tests
- Videos

The following training types are NOT currently scheduled to be updated to the new Learning Details page design:

- Forms
- Libraries
- Observation Checklists
- 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:
    - Number of currently registered users and max registration
    - Locator Number
    - Objectives

Is Being an Early Adopter Right for My Organization?

Your organization may benefit from the Early Adopter program if the following are true:

- A significant number of your organization's users access learning via mobile platforms
- Your organization aims to increase mobile usage across learners
- Your organization heavily utilizes events and sessions (note that exclusions apply to the Learning Details page for events and sessions)
- Your organization aims to increase learner engagement through discovery and self-registration of training
- Your organization leverages assignment functionality and would benefit from learners being able to view the status and due date of training from the Learning Details page
- Your organization uses ratings and reviews

Your organization may NOT be a good fit for the Early Adopter program if the following are true:

- Your organization heavily uses training types that are not currently supported, including:
  - Certifications
  - Programs and Cohorts
  - Libraries
  - Quick Courses
- Your organization heavily uses pre-work and post-work but does not set pre-work and post-work as available to learners
- Your organization relies heavily on Training Badges
- Your organization has heavy customization on this page (injected CSS via the page footer)
- Your organization has extended enterprise clients who need support for anonymous browsing

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 manager, approver or cost center approver. This is a manager/approver permission.	Learning
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 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 **Edit Training** option for	Learning - Administration

	training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	
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) Enhancements - Permanent "Notify Me" Link

This enhancement was released with the Nov 1 2019 patch.

With this enhancement, a **Notify Me of New Sessions** link is always available on the Event Details page, even if sessions are currently available for the event. This allows users to be notified of any additional sessions which are added for the event.

The **Notify Me of New Sessions** link is available under the list of available sessions on the Event Details page. To be notified when new sessions are added for the event, the user can click the **Notify Me of New Sessions** link, which is located in the Options drop-down menu for the session. This navigates the user to the Interest Tracking page, and the user can specify that they would like to be notified when new sessions are added to the event. ***Note:*** *The "ILT Session Becomes Available" email must be configured via Email Administration in order for users to be notified via email when a new session is available for an event in which they are interested.*

If Interest Tracking is not enabled via ILT Preferences, the **Notify Me of New Sessions** link does not display.

Learning Details Redesign (Early Adopter) Enhancements - Prerequisite Exception Requests

This enhancement was released with the Nov 1 2019 patch.

With this enhancement, users can generate an exception request when a session or curriculum they are requesting has prerequisite training that the user has neither requested nor completed. ***Note:*** *This functionality is available on both the Event Details page and on the Curriculum Details page.*

If a user requests a session or curriculum with prerequisites, but the user has not yet requested or completed the prerequisites, a pop-up appears. The pop-up asks the user if they would like to submit an exception request for the prerequisites. The user can select from the following options:

- **YES** - If the user clicks this option, an exception request is generated for the prerequisite. The exception request will be sent to administrators with permission to manage exception requests, who can then approve or deny the request.
- **NO** - If the user clicks this option, the pop-up closes and no action is performed.

For more information about exception requests: *See Exception Requests.*

For more information about approving and denying exception requests as an administrator: *See Grant/Deny Requests.*

Learning Details Redesign (Early Adopter) Enhancements - Session Scheduling Conflict Pop-Up

This enhancement was made available with the Dec 20 2019 patch.

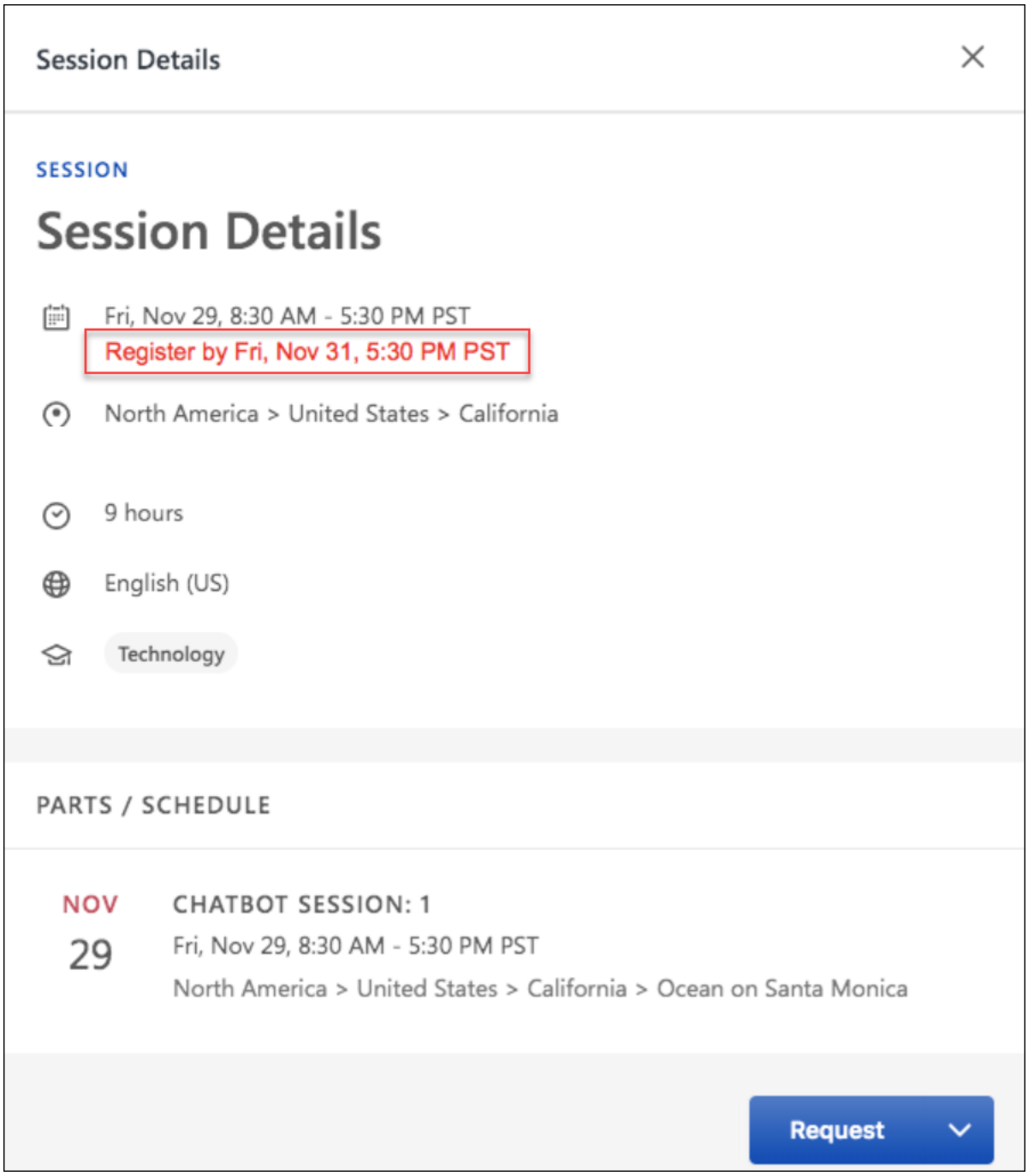
With this enhancement, a pop-up displays when a learner attempts to register for a session that conflicts with the time and date of another session for which they are already registered. This allows the learner to decide if they want to register for the session despite the conflict or stop the registration process for the new session.

If the learner would like to cancel their registration request, they can click the **X** button in the upper-right corner of the pop-up. If the learner would like to proceed with registering for the training despite the scheduling conflict, they can click the **CONTINUE** button. The registration request will be completed, and the user will have multiple sessions scheduled for the same time on their transcript.

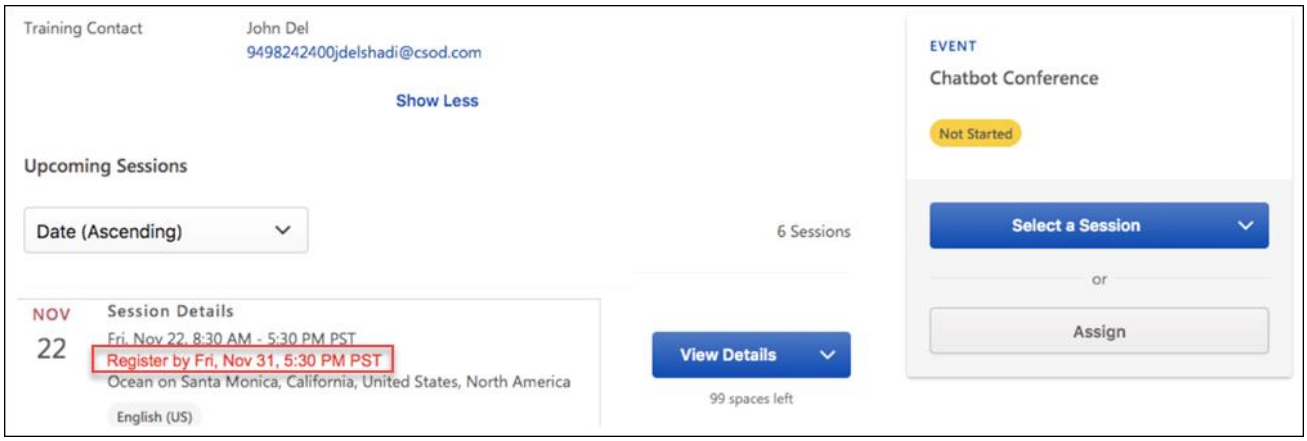
Learning Details Redesign (Early Adopter) Enhancements - Session Registration Deadline

This enhancement will be released with the Jan 10 2020 patch.

With this enhancement, if a session has a registration deadline, the registration deadline displays on the Session flyout and the Upcoming Sessions section in red text. The Session flyout is accessed by clicking the **View Details** option for a session on the Learning Details page of an event. If a session does not have a registration deadline, no registration deadline displays.



A registration deadline alert also displays next for sessions with a registration deadline in the Upcoming Sessions section. If a session does not have a registration deadline configured, this text does not display.

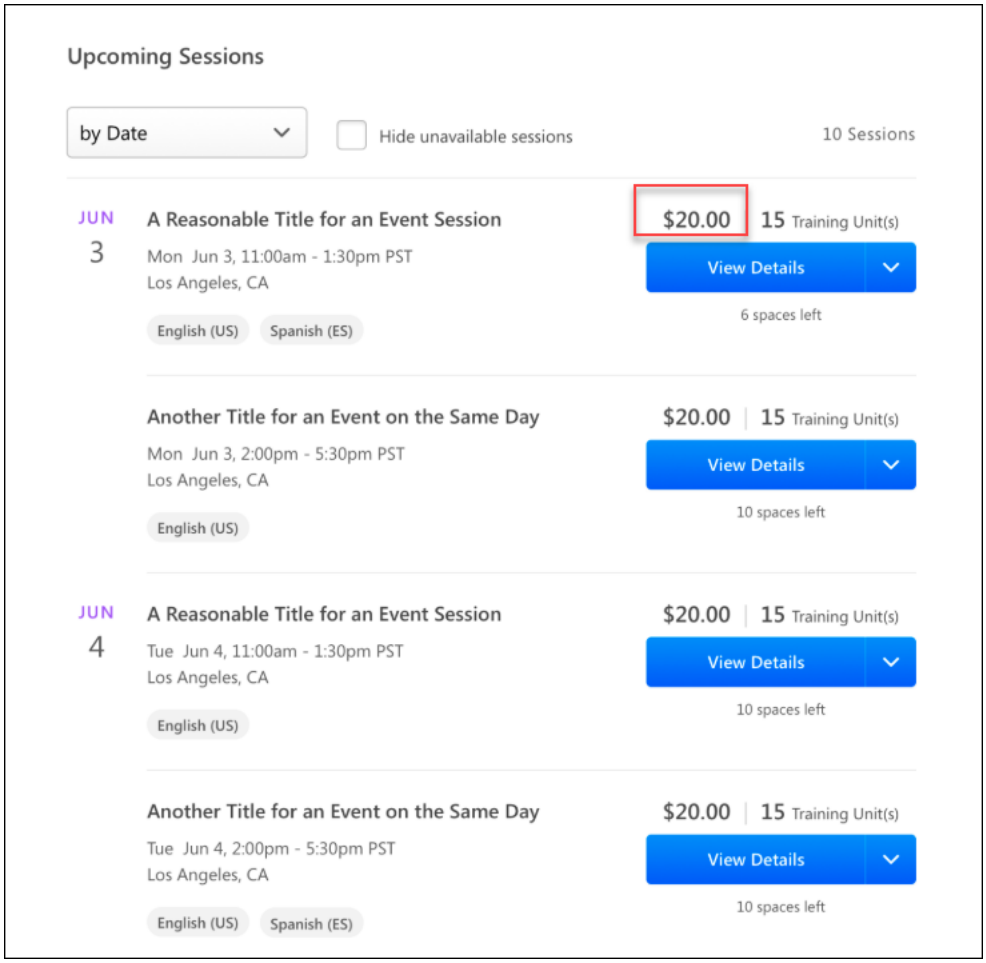

Training Contact
John Del
9498242400jdelshadi@csod.com
Show Less
Upcoming Sessions
Date (Ascending)
6 Sessions
NOV
22
Session Details
Fri, Nov 22, 8:30 AM - 5:30 PM PST
Register by Fri, Nov 31, 5:30 PM PST
Ocean on Santa Monica, California, United States, North America
English (US)
View Details
99 spaces left
EVENT
Chatbot Conference
Not Started
Select a Session
or
Assign

Learning Details Redesign (Early Adopter) Enhancements - Session Price

Prior to this enhancement, if a user wanted to view the price for an upcoming session on the Learning Details page, it was necessary to open the Session flyout for the session.

With this enhancement, if an upcoming session has a price, the price displays for the session in the Upcoming Sessions section on the Learning Details page.

This enhancement is not available during UAT. It will be made available with the Feb 7th release.



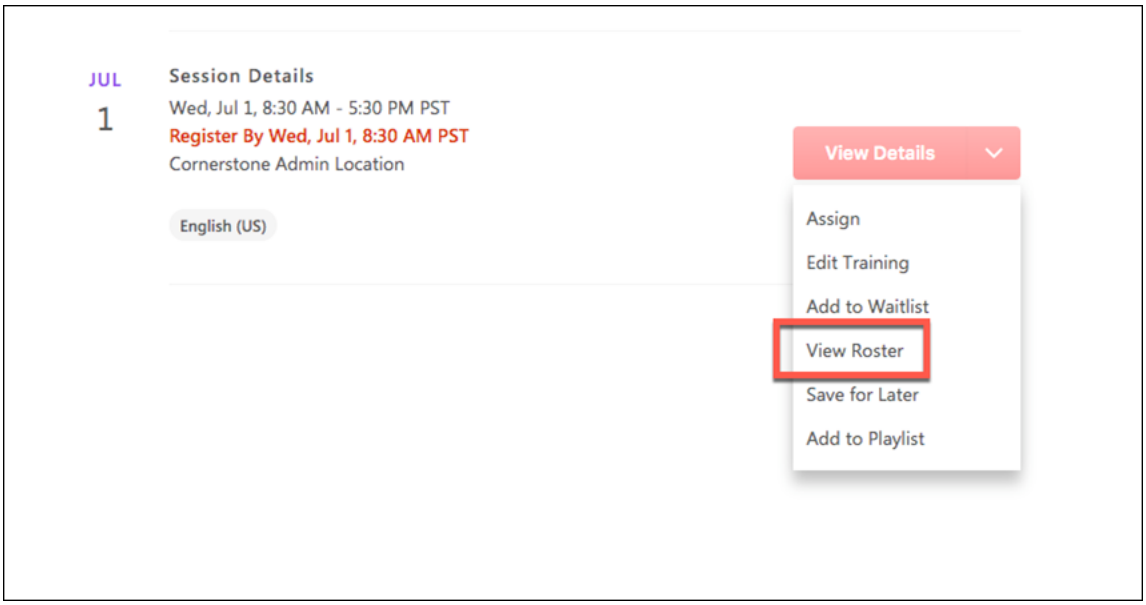
Learning Details Redesign (Early Adopter) Enhancements - Access Roster from Session Flyout

With this enhancement, instructor-led training (ILT) instructors and administrators can access the roster for their sessions using the Session flyout.

This enhancement will be released with the Jan 10 2020 patch.

Permissions

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



View Roster

To access the roster for an ILT session, access the Learning Details page for the associated event and locate the session on the Learning Details page. Click the **Options** drop-down to the right of the session and click the **View Roster** link. You will be redirected to the Roster page for the session within the same browser window. For more information about managing a session roster: *See Session Roster - Roster Tab.*

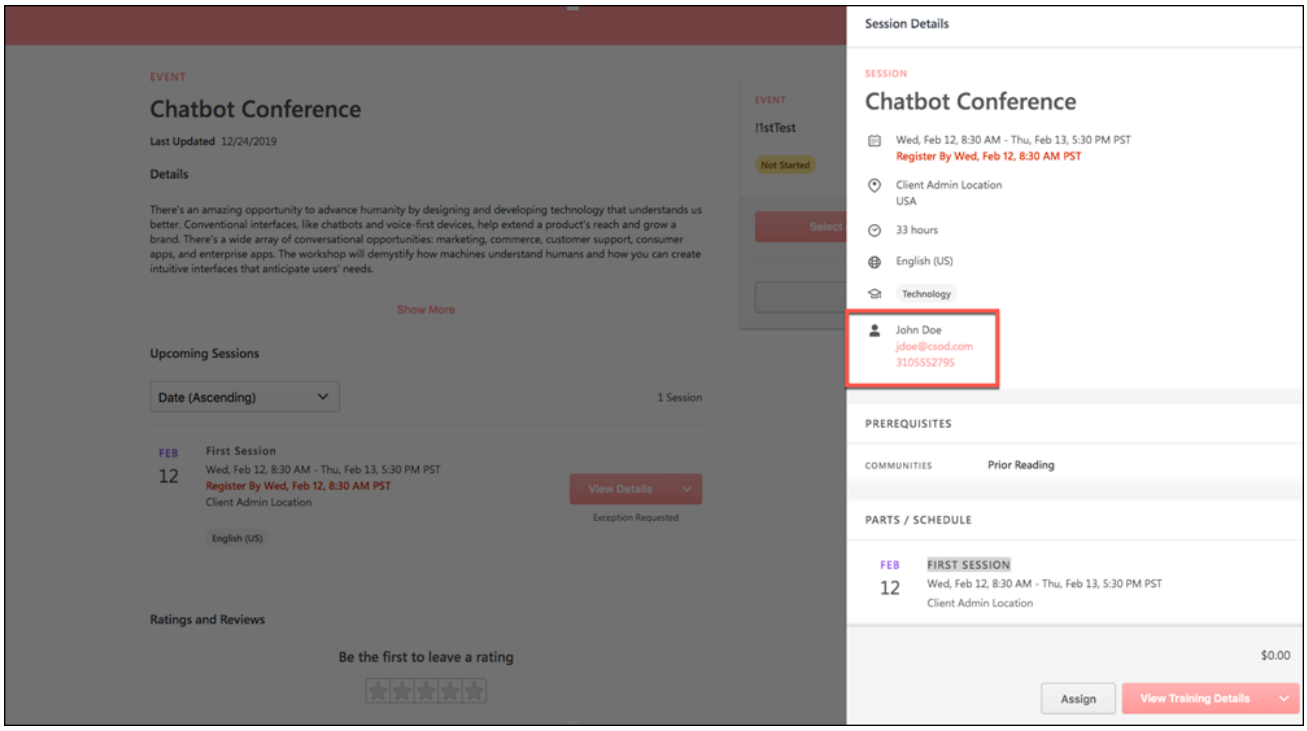
Learning Details Redesign (Early Adopter) Enhancements - Training Contact Visible in Session Flyout

This enhancement will be released with the Jan 10 2020 patch.

With this enhancement, information for the training contact associated with the instructor-led training (ILT) session displays on the Session flyout on the Learning Details page. To access the Session flyout, click the **View Details** option for a session on the Learning Details page of the event.

The following information displays for the training contact:

- Name
- Email Address
- Phone Number (if available)



Learning Modalities (Early Adopter) Enhancements

Learning Modalities (Early Adopter) Enhancements - Overview

Using Learning Search Preferences, administrators can allow users to filter by modality when searching for training. With the February 2020 release, modality filtering remains in an Early Adopter status, and when enabled, training items are mapped the following non-configurable modalities:

- Read
- Watch
- Attend
- Collections
- Listen (new with Feb 2020)
- Practice (new with Feb 2020)

The following additional features have also been added to Learning Modalities functionality with the Feb 2020 release:

- Modalities can be configured for individual training items
- Training can be mapped to multiple modalities
- Modalities can be configured in bulk via the Course Catalog

In future releases, additional features and customization options will be made available for this functionality.

Click here for the Learner Home and Learning Search Starter Guide!

Is being an Early Adopter right for my organization?

Your organization may be a good Early Adopter candidate for this enhancement if the following are true:

- My organization uses Learning Search and would like to take advantage of additional filters to help learners find the training they need
- My organization understands that not all existing Search by Modality features are currently available in the Early Adopter program, but we are eager to start using the features that are available now.

Considerations

Filter by Modality functionality is currently in an Early Adopter status, and configuration options are limited. With future releases, additional configuration options will be made available.

Implementation

The Learning Search Preferences page is automatically available in all portals using the Learning module. The option to allow filtering by modality is turned OFF by default. Administrators with the appropriate permission can change the setting of this option via the Learning Feature Activation Preferences page.

Important: It may take up to an hour for this functionality to be available in your portal after it is activated.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Modality Preferences	Grants access to Modality Preferences, where an administrator can configure settings related to learning object (LO) modalities. This is an administrator permission.	Learning - Administration

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 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 **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	Learning - Administration

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 page, where the administrator can configure Learning Search options.	Learning - Administration

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

Learning Modalities (Early Adopter) - Learning Feature Activation Preferences

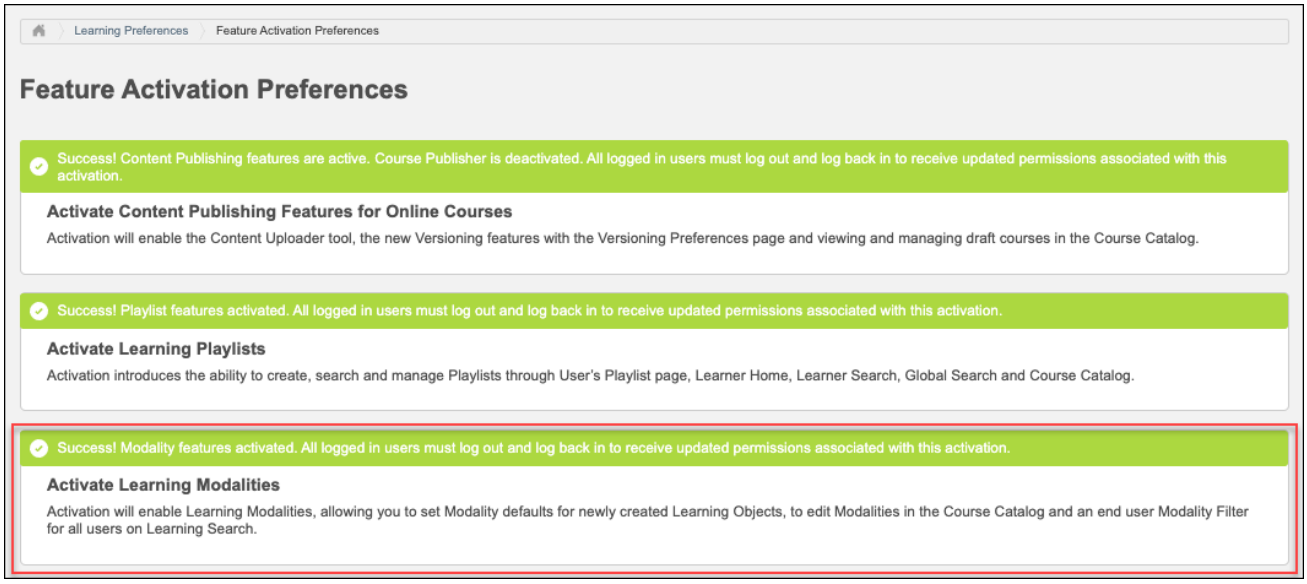
Learning Modalities (Early Adopter) can be enabled via the Learning Feature Activation Preferences page.

Important: It may take up to an hour for this functionality to be available in your portal after it is activated.

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



Enable Learning Modalities

In order for Learning Modalities functionality to be accessible in the portal, an administrator must activate it. To activate modalities in your portal:

1. Click the **ACTIVATE** button in the Learning Modalities section. A warning message appears, asking if you are certain you want to activate Learning Modalities functionality in the portal.

2. Click the **ACTIVATE** button to complete the activation of Learning Modalities features in the portal. Once activated, this functionality cannot be deactivated. To exit without activating Learning Modalities, 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 Learning Modalities.

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.

Learning Modalities functionality will be available in the following system areas after the activation:

- Learning Search
- Learning Search Preferences (learning modalities can be modified for individual organizational units (OUs) here)
- Course Catalog
- Course Console
- Modality Preferences

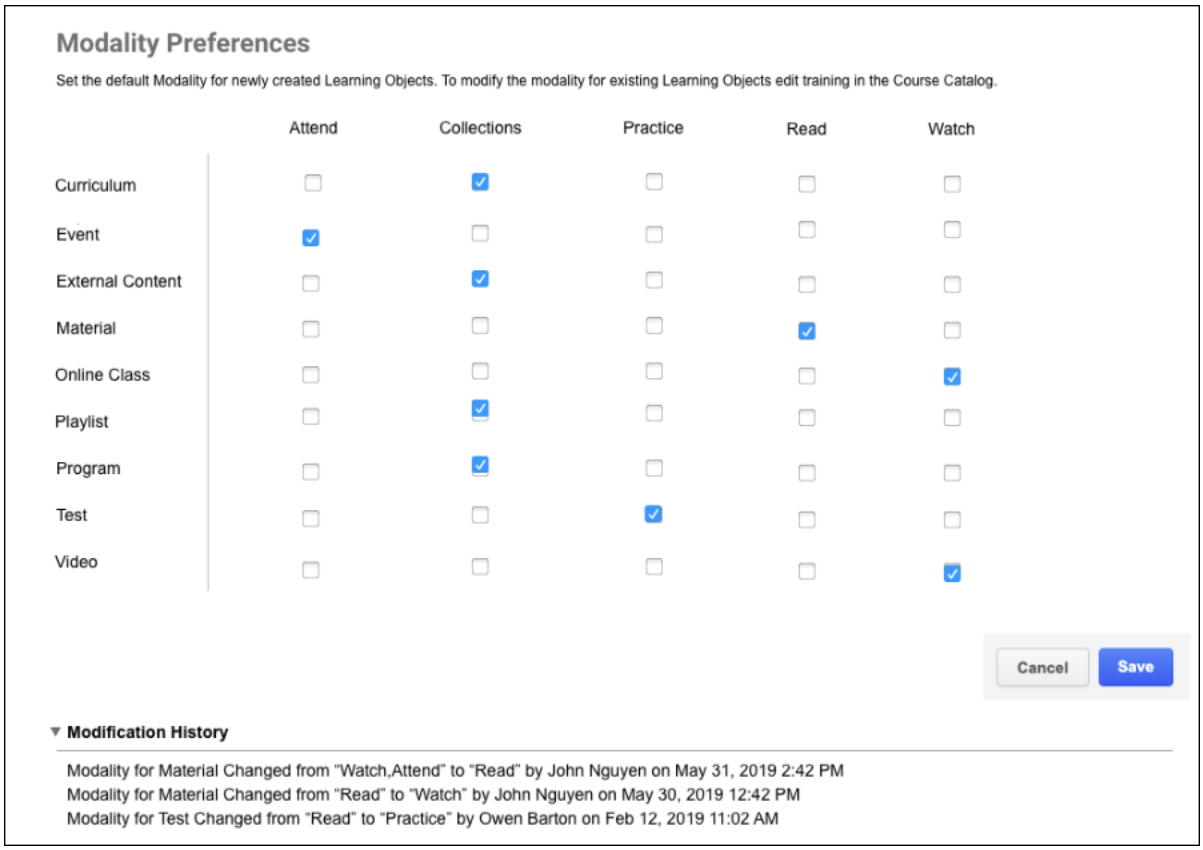
Modality Preferences

With this Early Adopter enhancement, administrators can configure which training types and which modalities can be used by users on the Learning Search page. Administrators can configure modality preferences via the Modality Preferences page.

To access the Modality Preferences page, go to: ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES and click the **Modality Preferences** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Modality Preferences	Grants access to Modality Preferences, where an administrator can configure settings related to learning object (LO) modalities. This is an administrator permission.	Learning - Administration



Configure Modalities

On the Modality Preferences page, the different training types available in the system display in the left-hand column, and the available learning modalities display in columns

next to the training types. To enable a modality for a training type, check the box for that modality in the training type's row.

Click the **SAVE** button at the bottom of the page. The Modality section will then be available to users in the filter panel on the Learning Search page. If you wish to discard any changes you have made to the Modality Preferences page, click the **CANCEL** button. Your changes will not be saved.

The modality types are not currently configurable. As a result of user feedback, the following default modality types are available in the Modality section of the Learning Search filter panel:

- **Attend** (includes events)
- **Collections** (includes curricula, playlists, external content, and programs)
- **Listen** (includes none by default)
- **Practice** (includes tests)
- **Read** (includes materials)
- **Watch** (includes online courses and videos)

Users can select these modality filters to filter the Learning Search page for training mapped to those modality types. For more information about using the Learning Search page: *See Learning Search.*

In addition to the default training types associated with different modalities, administrators can manually associate modalities with specific training items. *See* **Configure Modalities** on page 298 *for additional information.*

Configure Modalities

Modalities can be configured for individual training items via the Course Console and also in bulk via the Course Catalog.

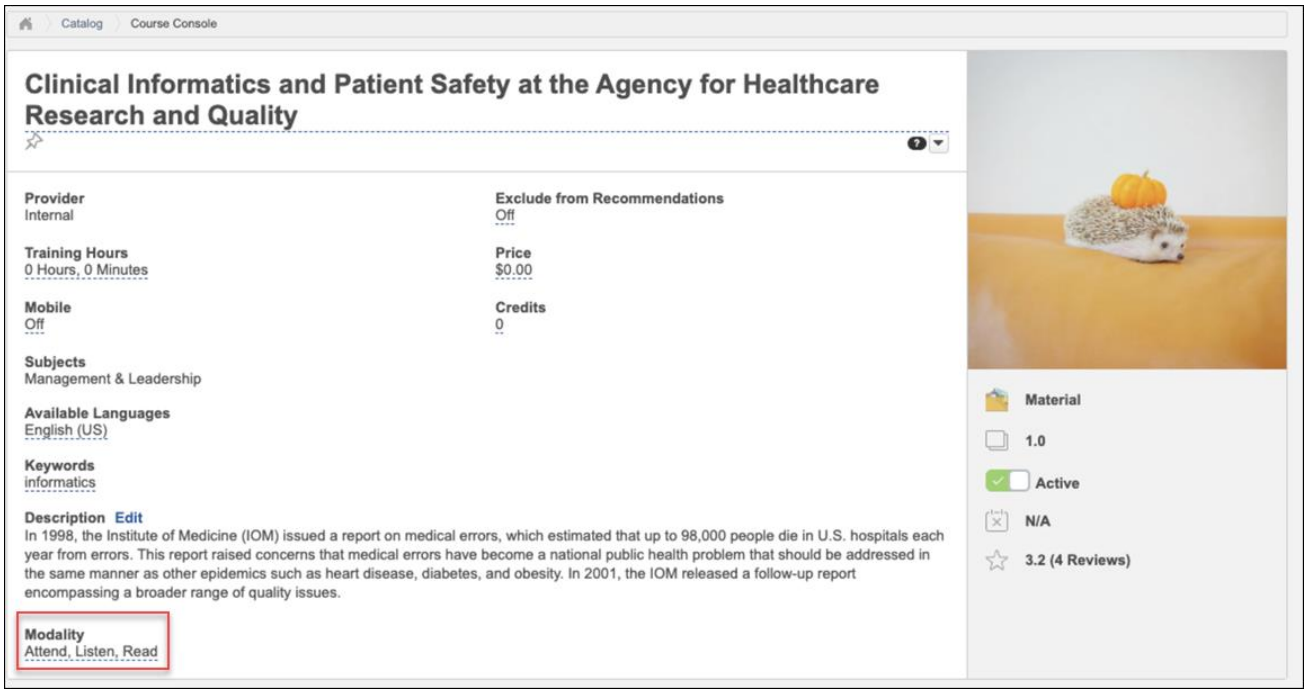
Configure Modalities for Training Item

Administrators have access to a Course Console page for each training item in the Course Catalog, which allows them to manage various aspects of a training item from one central location.

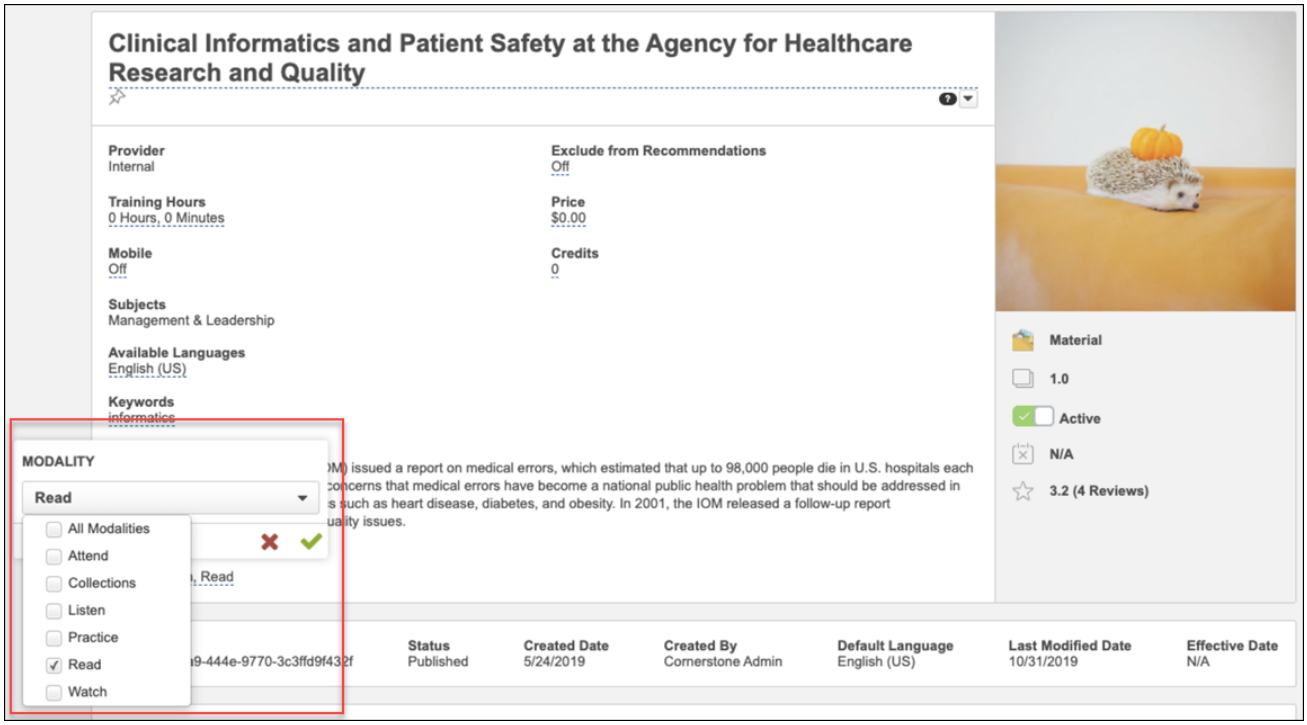
To access the Course Console, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG and then search for a specific LO using the **Search the Catalog** field. After you have found the LO for which you want to view the Course Console, click on the LO's title. This navigates you to the Course Console page for that LO.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	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 **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	Learning - Administration



If modalities have been enabled in the portal, an editable Modality field displays on the Course Console page. To edit modalities for a training item, click the Modality field. This opens a drop-down menu. From the menu, check the boxes for any modalities which should be associated with the training item. When you have finished selecting modalities, click the green checkmark icon to apply your changes to the training item.

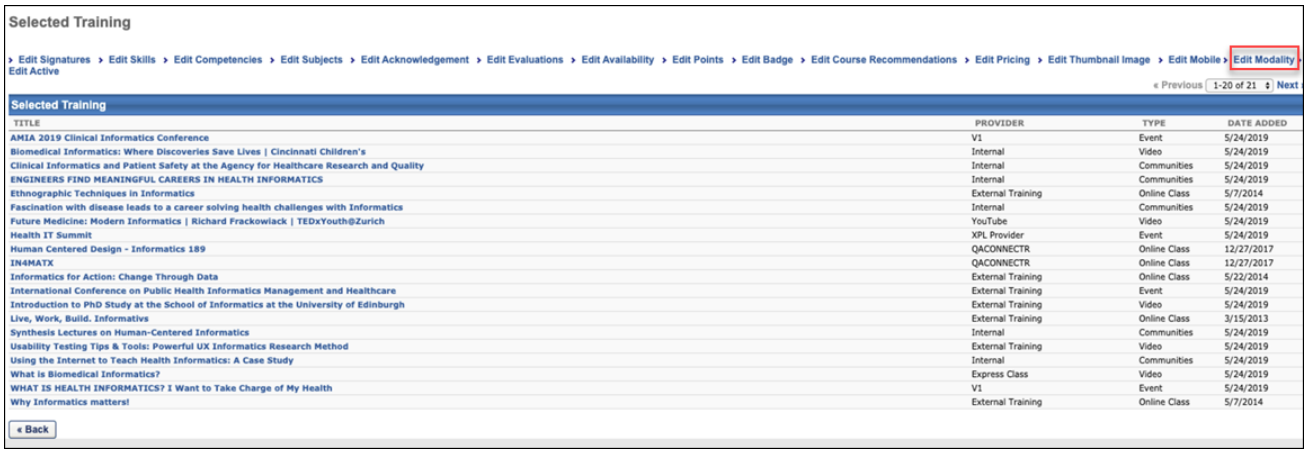


Configure Modalities in Bulk

Using Course Catalog batch edit functionality, you can modify the thumbnail image that displays for training on the Learner Home and Learning Search page in bulk. To edit modalities for multiple learning objects (LOs) at once, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG. Select all the training items for which you want to configure modalities.

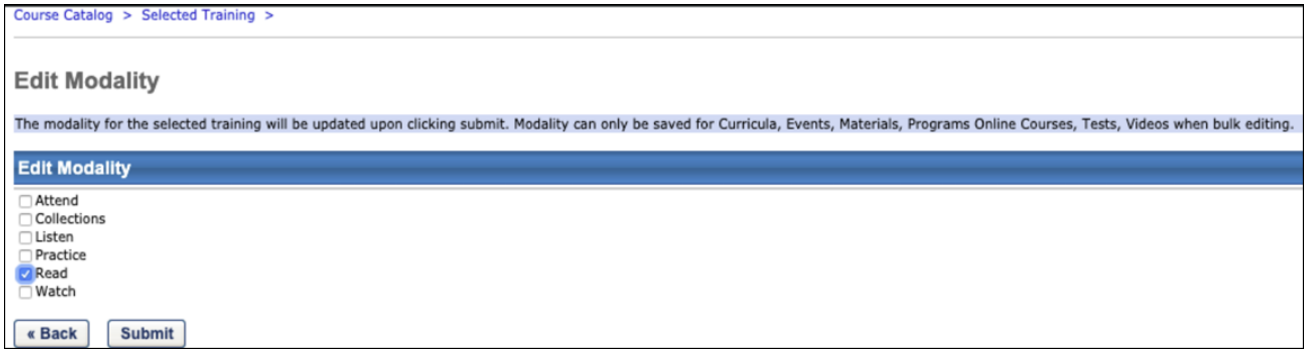
Permissions

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 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 **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	Learning - Administration



Edit Modality

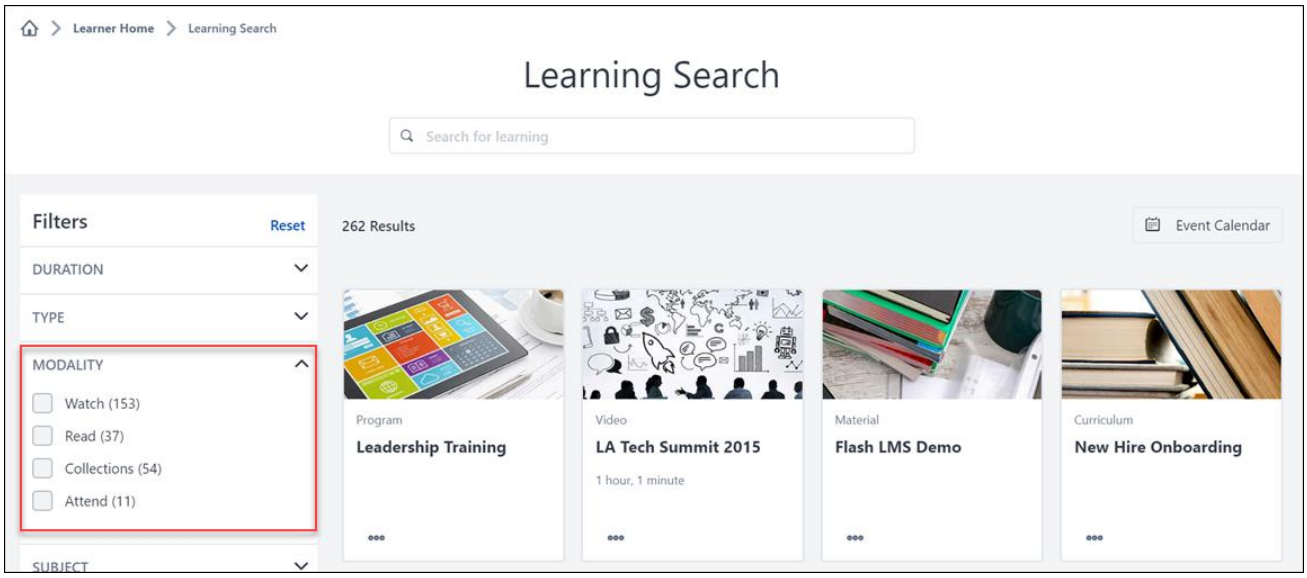
On the Edit Modality page, check the boxes of all the modalities which should be associated with the training items you selected from the Course Catalog. Click the **SUBMIT** button to submit your selections.



Modalities on Learning Search

On the Learning Search page, users can use modalities as filters to help narrow their training searches. In the Modality filter section, each modality type displays as a checkbox. The user can check to box next to any modalities to apply them as a filter. The number of training items associated with each modality displays next to the modality type in parentheses.

Note: *If no training is associated with a modality type, the modality type does not display in the Modality filter section.*


Learner Home
Learning Search
Learning Search
Search for learning
Filters
Reset
DURATION
TYPE
MODALITY
Watch (153)
Read (37)
Collections (54)
Attend (11)
SUBJECT
262 Results
Event Calendar
Program
Leadership Training
Video
LA Tech Summit 2015
1 hour, 1 minute
Material
Flash LMS Demo
Curriculum
New Hire Onboarding

Learning Search - Exact Title Match

When using Learning Search, if an exact title match is found, that training item is prioritized and returned higher in the search results than other items. This allows learners to find relevant training results quickly and accurately. However, if a user searched for a training title that is not offered in their display language, no exact title match would be found, and a course with that title would not be prioritized in search results.

With this enhancement, users can receive exact title matches for training items offered in languages that are not their own by searching for the training using its default title.

Use Case

Gavi is a content administrator at ACME Corp. He creates an online course called "The Importance of Being Modest." Gavi's display language is set to English (US), so the default language of the training and the title of the training is set to English (US). This means that English (US) is the language in which the training displays to the user if the course is not localized in their language. Gavi also configures a localized title in Spanish (Spain) of "La importancia de ser modesto."

Maya, a user whose display language is set to Italian (Italy), logs into the system and searches for "The Importance of Being Modest." Learning Search is able to find an exact title match using the default title even though the course is not available in Maya's display language.

Henri, a user whose display language set to Spanish (Spain), logs into the system and searches for "La importancia de ser modesto" and sees Gavi's course prioritized in search results.

Considerations

This functionality is applied to the following system areas:

- Learning Search
- Learner Home
- Global Search (only if the **Learning Search** option has been selected instead of **Traditional Search** via Search Preferences)

For more information about selecting the search engine for Global Search: *See Search Preferences - Training.*

Implementation

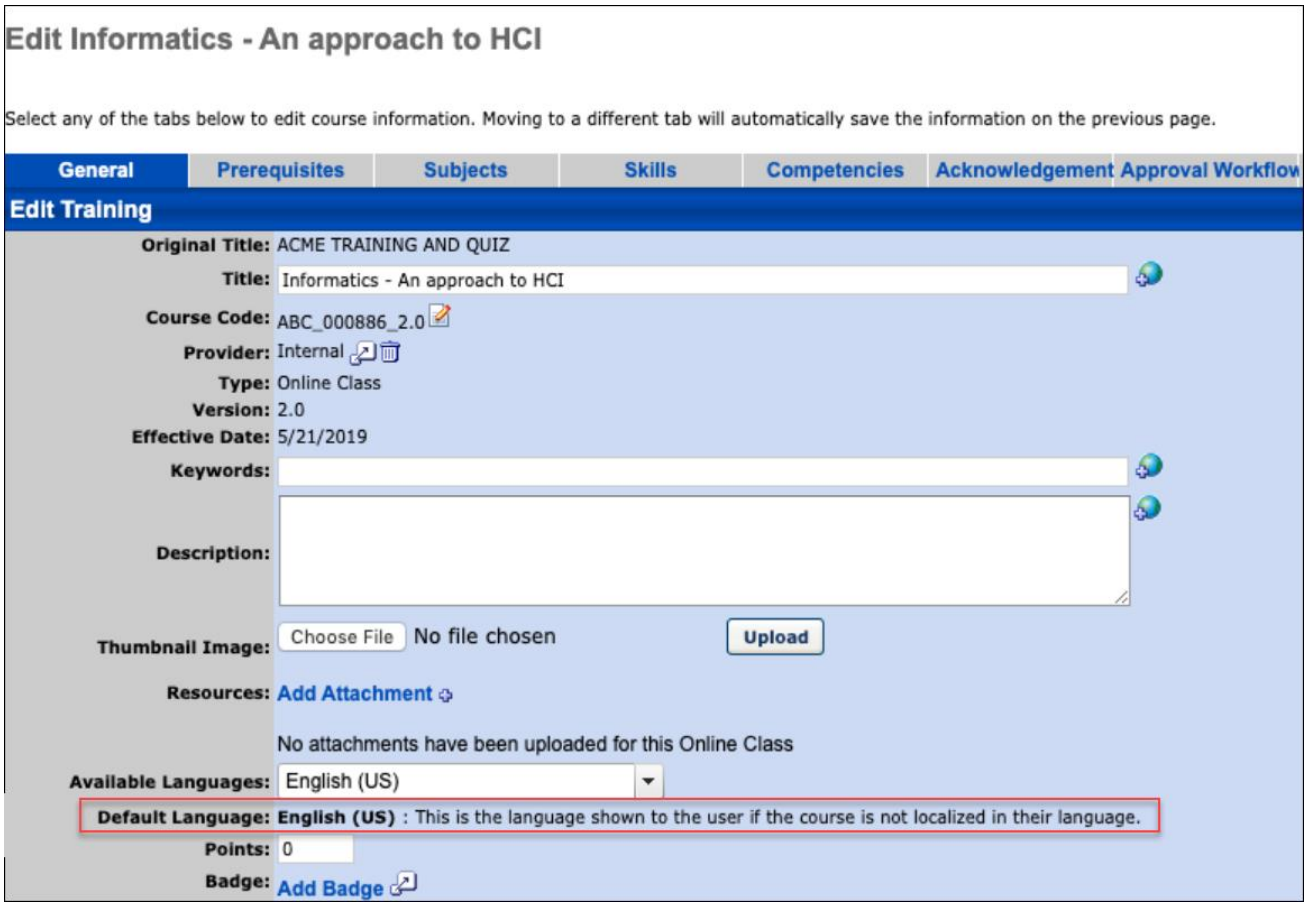
This functionality is automatically enabled for all portals using the Learning module.

Q&A

See below for common questions and answers about this feature:

Q: How do I know the default language or title of a training item?

A: Access the Course Catalog page for the training item and view the Default Language field on the General tab.



Q: Can I edit the default title of a training item?

A: If your display language matches the default language, simply edit the title of the training. If your display language does not match the default language, click the localization icon next to the **Title** field on the Course Catalog - General page for the training and change the title of the training for the default language.

Online Content

Online Content - Overview

With this enhancement, a new training type called "online content" is available, which supports third-party online content hosted on the provider's servers and delivered to the Cornerstone system through a subscription or content integration.

Before the online content training type was made available, third party content had to conform to existing e-learning standards, such as SCORM or AICC, to display as an online class training type and to have progress tracked in the Cornerstone system. Content which did not conform to these standards, such as MOOCs, could be launched by URL as a material training type, but without progress tracking. Learners could only self-report their completion of materials.

Online content is different from other training types because online content training is hosted outside the Cornerstone system, unlike other training types which are added directly to the Cornerstone system by administrators. When used in tandem with the Progress API, online content can be reported on in detail, including information such as completion status, time spent, score, and bookmarks.

With the introduction of the online content training type, content hosted on the provider’s servers which does not conform to e-learning standards can now have progress tracked as if it were an online class. Progress information such as completion status, time spent, score, and bookmarks are communicated via API directly from the provider to the Cornerstone system.

Considerations

The online content training type is only applicable to third-party content integrations. This means that as of the Feb 2020 release, the online content training type is only applicable to the following integrations:

- Coursera for Business integration
- edX for Business integration

Other third-party content integrations may use the online content training type in the future.

Online content is not added directly to the Cornerstone system by administrators. It is delivered to the system automatically only as part of a subscription or content integration.

Exclusions

- The standard report, Transcript Status Report, does not include online content.
- Libraries do not support online content.
- Online content is hosted externally on providers' servers and cannot be made available offline.

Implementation

Online content is added to portals via a content integration. With the February 2020 release, the online content training type is only available with the Coursera for Business

and the edX for Business integrations. The online content training type is not available during UAT.

The following features DO support the online content training type:

- Learning Admin Console
- Curricula
- Training requests
- Training Form Management
- Browse for Training (except Featured carousel)
- Development plans
- Course rating support (not possible to select OLCO in Training Preferences)
- Training custom fields
- Evaluations
- Training Plans
- Signature Preferences
- Content Requesting Preferences
- Content Launching Preferences
- Training Reasons Preferences
- Connect communities
- Transcripts
- View Training Details page
- Approval workflows
- Learner Home
- Catalog
- Learning Assignment Tool
- Training Details page
- Availability
- Search (Global and Learner Home search)
- Default Training Image Preferences
- Learn App

Online Content - Course Console and Course Catalog

Administrators are able to access online content items from both the Course Console and the Course Catalog and can edit certain metadata for these items, BUT any manual changes made to the metadata for online content can be overridden by future automatic synchronizations performed by the third-party content integration.

Course Console - Online Content

When an online content training item is accessed via the Course Console, an alert appears at the top of the page, stating, "This is external content that may be updated via automatic synchronization. Manual changes made on this screen may be overwritten." Also, the **Training Type** field displays a value of Online Content, and the administrator can edit the following metadata for the online content:

- Title
- Training Hours
- Mobile setting
- Subjects
- Available Languages
- Keywords
- Description
- ID
- Status
- Created Date
- Created By
- Default Language
- Last Modified Date

Note: *The Active/Inactive setting is non-editable via the Course Console. The content must be deactivated by the third-party content provider in order to be deactivated in the system.*

Course Catalog - Online Content

When an online content training item is accessed via the Course Catalog, an alert appears at the top of the page, stating, "This is external content that may be updated via automatic synchronization. Manual changes made on this screen may be overwritten." Also, the **Type** field displays a value of Online Content, and the administrator can edit the following metadata for the online content:

- Title
- Version
- Learning Object ID
- Keywords
- Description
- Thumbnail Image
- Available Languages
- Default Language

- Mobile setting

Note: *The Active checkbox is non-editable via the Course Catalog. The content must be deactivated by the third-party content provider in order to be deactivated in the system.*

Online Course Versioning - Due Date Criteria Enhancement

Online Course Versioning - Due Date Criteria Enhancement - Overview

Prior to this enhancement, when versioning an online course, administrators could select the **Apply Previous Version Due Date** option when configuring due date criteria, which would simply apply the exact due date for the prior version to the new version. For example, if the previous version had a due date of Feb 1, the new version would also receive a due date of Feb 1. Relative due date criteria, such as "10 days from Date Assigned," could NOT be applied to the new version using this option.

With this enhancement, administrators can still apply an exact due date from the previous online course version to the new version if desired, but they can also apply relative due date criteria to the new online course version by selecting the new **Apply Previous Version Due Date Criteria** option. This more dynamic due date setting provides increased flexibility when configuring due dates for reversioned online courses.

Note: *This project is part of the largermulti-release Learning Compliance Scalability Initiative. The release of this project concludes the Learning Compliance Scalability Initiative.*

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 - Administratio n

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
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 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 **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	Learning - Administration
Online Class - Publish	Grants access to two pieces of functionality: ○ Publish button on the Course Console, allowing administrator to publish a draft online class	Learning - Administration

	○ Upload section of the online class versioning workflow As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administratio n

Apply Previous Version Due Date Criteria Option

On the second step of versioning an online course, the administrator selects versioning options. The **Apply Previous Version Due Date Criteria** option is located on this page.

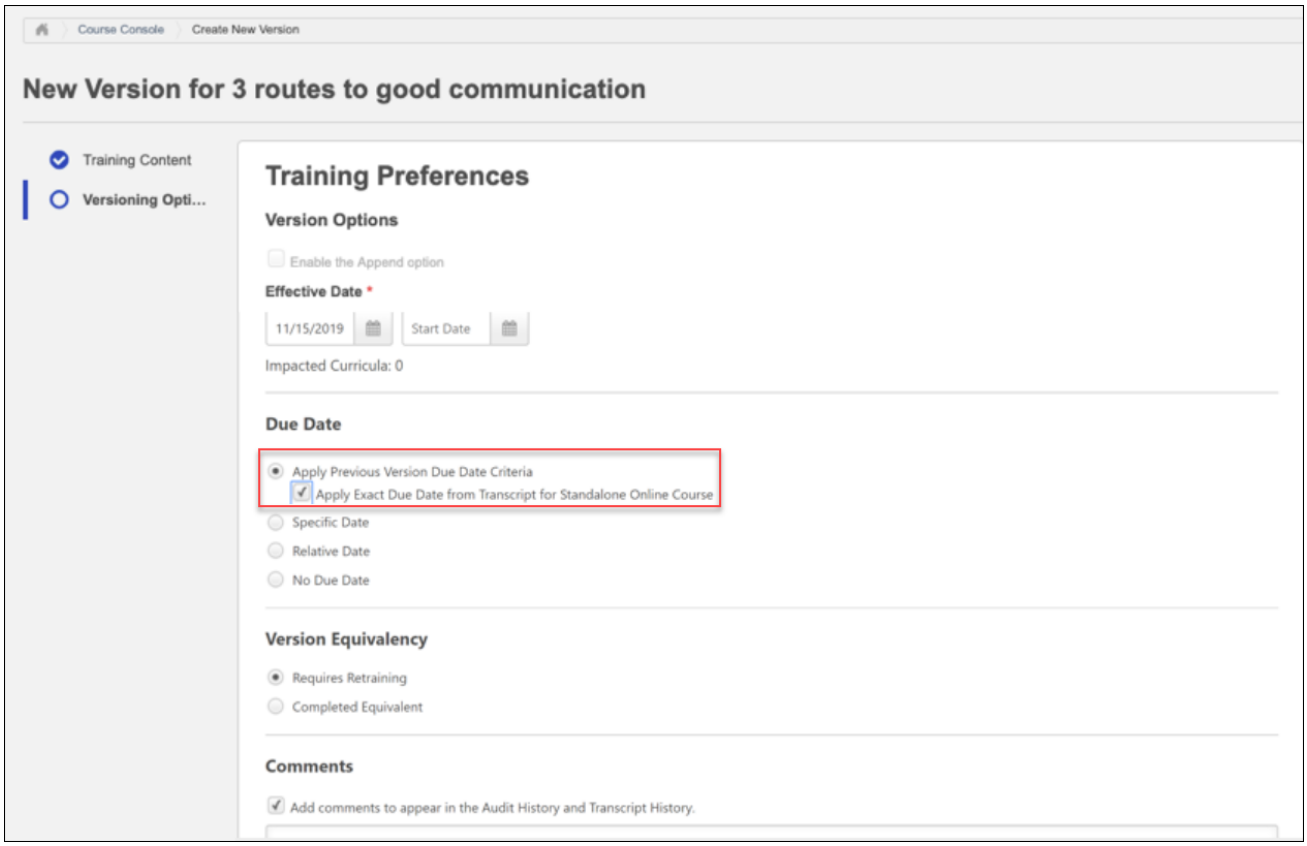
To create a new version of an online course, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link. Find the online course in the Course Catalog and then click the course title. From the Course Console page, click the **Options** drop-down menu and click the **Create Version** option. Proceed to the Versioning Options step of the process to configure due date criteria.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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
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

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 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 **Edit Training** option for training items included as objectives in Development plans. 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. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	Learning - Administration
Online Class - Upload	Grants access to the Content Uploader where an administrator can upload zip packages to create draft online classes. In addition, this permission grants the ability to upload a new zip package as part of the online class versioning process. This permission does NOT grant the ability to publish online classes. Without the permission to publish online classes, administrators with the permission to upload online classes can only upload and save online classes, which then must be published by administrators with the relevant permission. As of November 10, 2017, this is the only permission which provides access to the Content Uploader page.	Learning - Administration
Online Class Version - Publish	Grants ability to upload and publish new online class versions. This permission works in conjunction with the permission for uploading online classes. This permission can be constrained by OU, User's OU,	Learning - Administration

	Users, and Providers. This is an administrator permission. As of November 10, 2017, this permission does NOT provide access to the Content Uploader page.	



Apply Previous Version Due Date Criteria

To apply the due date criteria of the previous course version to the new course version, including dynamic due date criteria such as "10 days from Date Assigned," select the **Apply Previous Version Due Date Criteria** option from the Due Date section. To apply an exact due date from the previous version to the new standalone online course version, also select the **Apply Exact Due Date from Transcript for Standalone Online Course** sub-option.

If relative due date criteria from the previous version is applied to the new version, the new version's due date will be the specified number of days after the new version's effective date.

For additional information about online course versioning options: *See Online Course - Create Version - Versioning Options.*

Example

1. Victor, an administrator, assigns Michelle, an employee, an online course called “Hand Washing Best Practices” V1 via the Learning Assignment Tool (LAT) on January 1st.

The course has a relative due date of "1 month from date assigned," so Michelle receives "Hand Washing Best Practices" V1 on her transcript with a due date of February 1st.

2. Victor reversions the online course, "Hand Washing Best Practices" V1 to V2 on March 1st with an effective date of March 15th. He includes Michelle in the user versioning criteria and selects the **Requires Retraining** option for her. For the due date criteria, he selects the **Apply Previous Version Due Date Criteria** option.
3. Michelle receives the online course, "Hand Washing Best Practices" V2 on her transcript with a due date of April 15th (1 month after the effective date of the new version).

Online Course Versioning Preferences - Due Date Options

Administrators can set default options for the online course versioning process and specify whether these options are editable via the Online Course Versioning Preferences page. The **Apply Previous Version Due Date Criteria** option is included as a default due date option.

To set online course versioning preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES and click the **Online Course Versioning Preferences** link. Online course versioning preferences are set by division, so choose the division for which you want to set preferences.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Online Class Versioning Preferences	Grants ability to set default options for the online class versioning process. This is an administrator permission.	Learning - Administration

Due Date

In the Due Date section, select a default due date option for reversioned courses. Available options include:

- Apply Previous Version Due Date Criteria (new)
  - Apply Exact Due Date from Transcript for Standalone Online Course (not selected by default)
- Specific Date
- Relative Date
- No Due Date

For more information about online course versioning preferences: *See Online Course Versioning Preferences.*

Reporting - Learning Fields

Reporting - Learning Fields - Overview

With the February 2020 release, the following enhancements have been made to Learning reporting:

- A new **Standalone on Transcript** field for Custom Reporting and Reporting 2.0 allows administrators to report on whether a training item is standalone training on a user's transcript. This enhancement was made available with the Nov 15 2019 patch.
- New certification fields are available in Reporting 2.0
- Subject reporting is now available for Reporting 2.0

Considerations

Work order requests for subject data will no longer be accepted as of the February 2020 release.

Implementation

This functionality is automatically available to organizations using the Learning module and Reporting 2.0.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Learning - Subject - Manage	Grants ability to create and edit Subject reports. This permission can be constrained by User Self and Subordinates, OU, User’s OU, User's Direct Subordinates, and User. This permission can also be constrained by training, which returns training items associated with a subject.	Reports - Analytics
Reporting - Learning - Subject - View	Grants ability to view the results of Subject reports. This permission can be constrained by User Self and Subordinates, OU, User’s OU, User's Direct Subordinates, and User. This permission can also be constrained by training, which returns training items associated with a subject.	Reports - Analytics

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
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) reports created by self or shared by others. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics

Reporting - Standalone on Transcript Field

With this enhancement, a new reporting field is available in Reporting 2.0 and Custom Reporting. The new **Standalone on Transcript** field allows administrators to report on whether a training item is standalone training on a user's transcript. This functionality was made available with the Nov 15 2019 patch.

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Standalone on Transcript	Transcript Section, Curriculum Section	Allows administrators to report on whether training on a learner's transcript is a standalone training. When a training item exists as a standalone item on a learner's transcript, this field displays a value of True. When a training item exists as a child item within a curriculum, this field displays a value of False.	Yes/No	Custom Transcript Report, Custom Curriculum Training Report

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Custom Curriculum Transcript Report - Create	Grants ability to view results of custom Curriculum Transcript reports created by self or shared by others. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Reports - Analytics
Custom Curriculum Transcript Report - View	Grants ability to create and edit custom Curriculum Transcript reports. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Direct Reports.	Reports - Analytics
Custom Transcript Reports - Create	Grants ability to create and edit Custom Transcript (Training Record) reports. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	Reports - Analytics
Custom Transcript Reports - View	Grants ability to view results of Custom Transcript (Training Record) reports created by self or shared by others. This permission can be constrained by	Reports - Analytics

	OU, User's OU, User Self and Subordinates, and User's Direct Subordinates.	

Reporting - Certification Fields

With this enhancement, additional certification fields are available. These new fields are available in Reporting 2.0. These fields are NOT available in Custom Reporting.

This enhancement will be available in a post-release patch.

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. ***Note:*** *This field does not apply to Past Due and On Hold flags, as flags are separate from certification statuses.*	Date	Certification Report
Certification ID	Certification	This field is a unique identifier for a certification.	Text	Certification Report

Reporting - Subject Reporting

With this enhancement, a new Subject report type is available for Reporting 2.0, which includes new fields that allow administrators to report on learning subjects. The new Subject report contains three sets of fields:

- Subject Fields - Set of fields which describe subjects
- Subject User Fields - Set of user fields which describe users who have saved the subject to their Universal Profile
- Subject Training Fields - Set of training fields associated with the subject

This enhancement will be made available in Stage on Jan 28 2020.

To have access to the fields in all three field sets, enable the Reporting 2.0 permissions for each set.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Learning - Subject - Manage	Grants ability to create and edit Subject reports. This permission can be constrained by User Self and Subordinates, OU, User's OU, User's Direct Subordinates, and User. This permission can also be constrained by training, which returns training items associated with a subject.	Reports - Analytics
Reporting - Learning - Subject - View	Grants ability to view the results of Subject reports. This permission can be constrained by User Self and Subordinates, OU, User's OU, User's Direct Subordinates, and User. This permission can also be constrained by training, which returns training items associated with a subject.	Reports - Analytics

See the tables below for information about the new fields available within the Subject report:

Subject Fields

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Subject ID	Subject	The subject ID is a the unique identifier for a subject within a portal.	Text	Custom Subject Report

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Subject Name	Subject	This field displays the name of the subject.	Text	Custom Subject Report
Parent Subject ID	Subject	This field displays the subject ID for the parent subject.	Text	Custom Subject Report
Subject Default Language	Subject	This field displays the default language for the subject (the creator's display language, as configured on their user record).	Text	Custom Subject Report
Parent Subject Name	Subject	This field displays the name of the subject's parent subject.	Text	Custom Subject Report
Equivalent Subject Name	Subject	This field displays the subject names of equivalent subjects. The value for this field is obtained from the Subjects Management page.	Text	Custom Subject Report
Equivalent Subject ID	Subject	This field displays the subject IDs of equivalent subjects. The value for this field is obtained from the Subjects Management page.	Text	Custom Subject Report
Parent Equivalent Subject Name	Subject	This field displays the name of the parent subject of any equivalent subjects. This field only displays the immediate parent of the subject. Multiple parent subjects display in individual rows.	Text	Custom Subject Report
Parent Equivalent Subject ID	Subject	This field displays the subject ID of the parent subject of the equivalent subject. This field only displays the immediate parent of the subject. Multiple parent subjects display in individual rows.	Text	Custom Subject Report

Visibility for the above fields is controlled by the following Reporting 2.0 permissions:

- Reporting - Learning - Subject - Manage
- Reporting - Learning - Subject - View

Note: *Constraints cannot be applied to Subject fields.*

Subject User Fields

The Subject User section is an alias for the User section. The Subject User section contains user fields which are available to the user building the report. In the context of the Subject Report, the users who appear in the Subject User fields are those who have saved the subject on their Universal Profile or via Learner Home.

Subject Training Fields

The Subject Training section is an alias for the Training section and contains training fields that are available to the user building the report, in addition to the following new fields:

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE	AFFECTED REPORTS
Training Title	Subject	This field displays the name for the training items associated with the subject. The value for this field is obtained from the Subjects tab in the Course Catalog for the training.	Text	Custom Subject Report
Training Object ID	Subject	This field displays the ID for the training items associated with the subject. The value for this field is obtained from the Subjects tab in the Course Catalog for the training.	Text	Custom Subject Report

Visibility for the above fields is controlled by the following Reporting 2.0 permissions:

- Reporting - Learning - Subject - Training - Manage
- Reporting - Learning - Subject - Training - View

The following constraints are available for the above permissions:

- Restrict to Instructor
- Restrict to Facility
- Restrict to Training Type
- Restrict to User's ILT Provider
- Restrict to ILT Provider
- Restrict to Training Item
- Restrict to User as Instructor

Considerations

Work order requests for subject data will no longer be accepted as of the February 2020 release.

Transcript Enhancements

Transcript Enhancements - Overview

With the February 2020 release, the following enhancements have been made to the options available on the learning transcript:

- Clicking on the title of a training item from the transcript redirects the user to an actionable page for the training instead of the Transcript Details page, which could not be used to launch the training
- Numerous actions available on the Transcript Details page have been added to the Actions drop-down menu for training items on the transcript

Use Case

Danielle is a learner who visits her transcript to view and launch her assigned compliance training. Danielle sees that an online course has been assigned to her on her transcript, so she clicks the title of the course. She is redirected to the Learning Details page for the training, where she can launch the course and also access other training management actions.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
View Transcript Item	Grants ability to view details of learning objects that appear on the transcript (training record), by clicking on the name of the learning object. Users must also have the Bio About - View permission in order to access the transcript within Universal Profile. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, or User's Self. This is an end user permission.	Learning - Administration

Transcript Enhancements - Actions

Prior to this enhancement, when a user clicked the title of a training item on their learning transcript, they were redirected to the Transcript Details page for that training. It was not possible to launch the training from the Transcript Details page, so users would need to return to the previous page, click the Actions drop-down next to the training, and then launch the training.

With this enhancement, when a user clicks the title of a training item on their transcript, they are navigated to an actionable page. In most cases, this is the Learning Details page if the Learning Details page is enabled in the portal, or the Training Details page if the Learning Details page is NOT enabled in the portal, where the user is allowed to launch and take other action on the training. See below for the different actionable pages to which the user may be directed, depending on the training type:

With Learning Details Page Enabled

If the Learning Details page is enabled, the user is redirected to the following locations when they click the title of the training:

- **Learning Details** - The user will be directed to the Learning Details page if the Learning Details page is enabled for the specific training type when they click the title of any of the following training types from their transcript:
  - Material
  - Online course
  - Test
  - Video
  - Posting
  - Event
  - Curriculum
  - Cohort
- **Event Learning Details** - The user will be directed to the Event Learning Details page with the Session flyout expanded if they click the title of a session from their transcript.
- **External Content** - The external content will launch when the user clicks the title of an external training item from their transcript.
- **Transcript Details** - The user will still be directed to the Transcript Details page if they click the title of any of the following training types from their transcript:
  - External training
  - Certification

Note: *If the redesigned Learning Details page is not available in the system or for a training type, the user is directed to the Training Details page INSTEAD of the Transcript Details page when they click a training title.*

Without Learning Details Page Enabled

If the Learning Details page is NOT enabled, the user is redirected to the following locations when they click the title of the training:

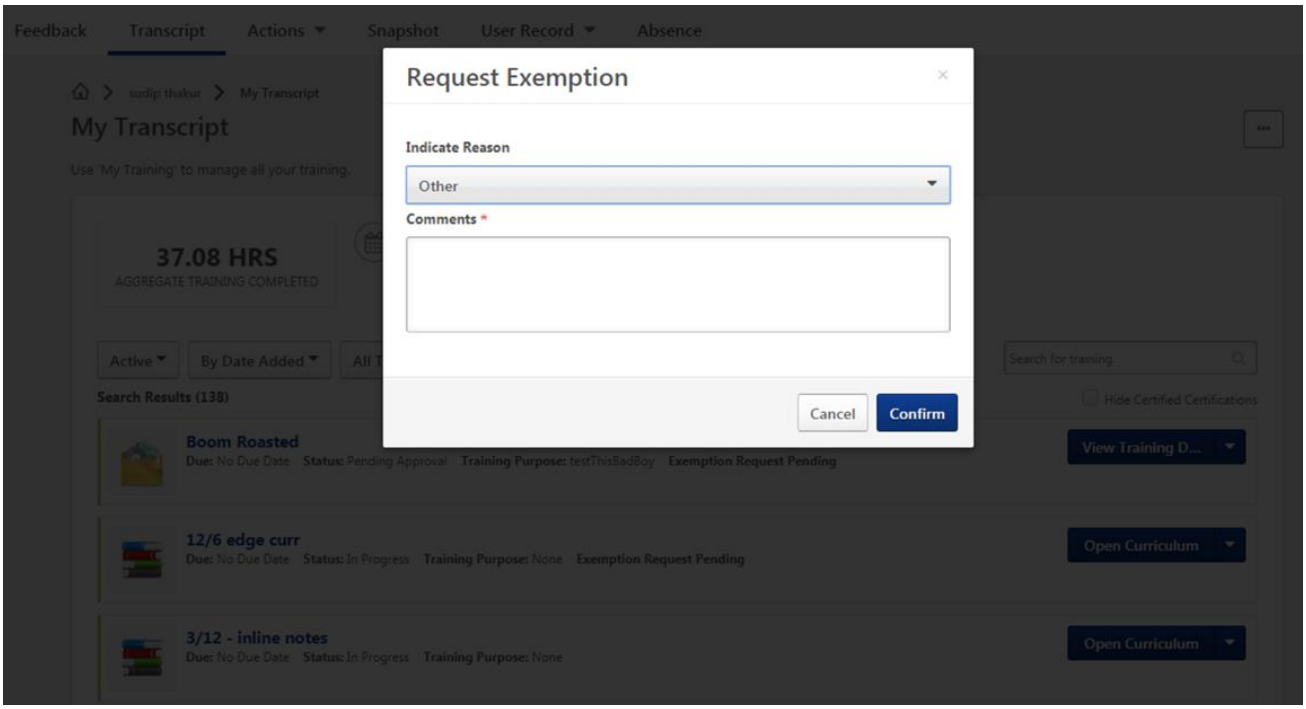
- **Training Details** - The user will be directed to the Training Details page if the Learning Details page is NOT enabled for the specific training type when they click the title of any of the following training types from their transcript:
  - Material
  - Online course
  - Test
  - Video
  - Posting
  - Event
  - Curriculum
  - Cohort
- **Session Details** - The user will be directed to the Session Details page if they click the title of a session from their transcript.
- **External Content** - The external content will launch when the user clicks the title of an external training item from their transcript.
- **Transcript Details** - The user will still be directed to the Transcript Details page if they click the title of any of the following training types from their transcript:
  - External training
  - Certification

Note: *Previously, if the user clicked a training title from their transcript, they were navigated to the Transcript Details page.*

Transcript Actions

Additional options are also now available in the Actions drop-down for training items on the transcript. Users can now access the following actions by clicking the drop-down menu next to a training item:

- **Request Exemption** - The **Request Exemption** option is available in the Actions drop-down for training items, if applicable to both the training item and the user. If a user clicks this option, the Request Exemption pop-up appears. Using this pop-up, the user must select a reason for the exemption request and enter a comment. The user can click **CONFIRM** to complete the request or click **CANCEL** to cancel the request.
- **Mark Exempt** - The **Mark Exempt** option is available to administrators in the Actions drop-down for training items, if applicable to both the training item and the user. If an administrator clicks this option, the Mark Exempt pop-up appears. Using this pop-up, the administrator must select a reason for the exemption and enter a comment. The administrator can click **CONFIRM** to complete the exemption or click **CANCEL** to cancel the exemption.



- **Move to Archived Transcript** - The **Move to Archived Transcript** option is available in the Actions drop-down for training items, if applicable to both the training item and the user. If selected, the Move to Archived Transcript confirmation pop up appears. Once the user confirms, the training item moves to the Archived tab of the transcript.
- **Restore from Archived Transcript** - The **Restore to Archived Transcript** option is available in the Actions drop-down, if applicable to both the training item and the user. The training item will be moved from the Archived tab of the transcript to the Active tab or the Completed tab, depending on the training item's status.

Performance

Bypass Development Plan Approval Permission

With this release, a new permission is available that allows system administrators to bypass any development plan approval requirements when submitting or assigning a development plan.

The following new permission is now available:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bypass Development Plan Approval During Assignment	Grants permission to bypass any development plan approval requirements when submitting or assigning a development plan. This is a system administration permission.	Performance

How Does this Enhancement Benefit My Organization?

For clients who enable approvals for development plans, this new permission allows certain power users to bypass the approvals when necessary, such as when changing large-scale development plans.

Implementation

The *Bypass Development Plan Approval During Assignment* permission is automatically added to the System Administrator security role. The system administrator can assign this permission to other roles if necessary.

Check-Ins

Conversations Renamed to Check-Ins

With this release, all product references to "Conversations" will be changed to "Check-Ins". This is a name change only; all of the functionality remains the same.

Not all references to "Conversations" within the Check-Ins application pages will be renamed at the start of UAT in Stage. URLs, the navigation bar, and configuration pages will only be accessible at the February 7, 2020 release.

Considerations

Any text created or customized by clients, such as custom template names, will not be renamed. If clients want to change customized text, please contact the appropriate CSM.

Implementation

Check-Ins is on by default in Stage and Production for users in the System Administrator role.

Summary of Changes for Administrator Tasks

Security Role Administration

The table below summarizes the name changes that apply to security roles. *This name change is not available with UAT.*

OLD NAME	NEW NAME
Conversation Templates - Manage	Check-Ins Templates - Manage
Conversations - Create	Check-Ins - Create
Reporting - Performance - Conversations - Manage	Reporting - Performance - Check-Ins - Manage
Reporting - Performance - Conversations - View	Reporting - Performance - Check-Ins - View

Template Management

The table below summarizes the name changes that apply to the administrative template management pages. *This name change for templates is not available with UAT.*

OLD NAME	NEW NAME
Conversation Templates	Check-Ins Templates
Performance Review Conversation	Performance Review Check-In
Coaching Conversation	Coaching Check-In
Check-In Conversation	1:1 Check-Ins
Create a Conversation Template	Create a Check-In Template
Edit a Conversation Template	Edit a Check-In Template
Preview Conversation Templates	Preview Check-In Templates

Permission Names

The table below summarizes the name changes that apply to permissions.

OLD NAME	NEW NAME
Conversation Templates - Manage	Check-Ins Templates - Manage
Conversations - Create	Check-Ins - Create

Email Digest Tag Names

The table below summarizes the name changes that apply to Email Digest tag names. *This name change is not available with UAT.*

OLD NAME	NEW NAME
{CONVERSATION.CREATOR.FIRST.NAME}	{CHECK-IN.CREATOR.FIRST.NAME}
{CONVERSATION.CREATOR.LAST.NAME}	{CHECK-IN.CREATOR.LAST.NAME}
{CONVERSATION.LINK}	{CHECK-IN.LINK}
{CONVERSATION.MEETING.DATE}	{CHECK-IN.MEETING.DATE}
{CONVERSATION.PARTICITPANT.FIRST.NAME}	{CHECK-IN.PARTICITPANT.FIRST.NAME}
{CONVERSATION.PARTICITPANT.LAST.NAME}	{CHECK-IN.PARTICITPANT.LAST.NAME}
{CONVERSATION.TITLE}	{CHECK-IN.TITLE}

Email Digest Management

The table below summarizes the name changes that apply to Check-Ins Email Digest Management. *This name change is not available with UAT.*

OLD NAME	NEW NAME
Recent Conversations	Recent Check-Ins
Missed Conversations	Missed Check-Ins
Upcoming Conversations	Upcoming Check-Ins

Reporting 2.0

The table below summarizes the name changes that apply to Reporting 2.0.

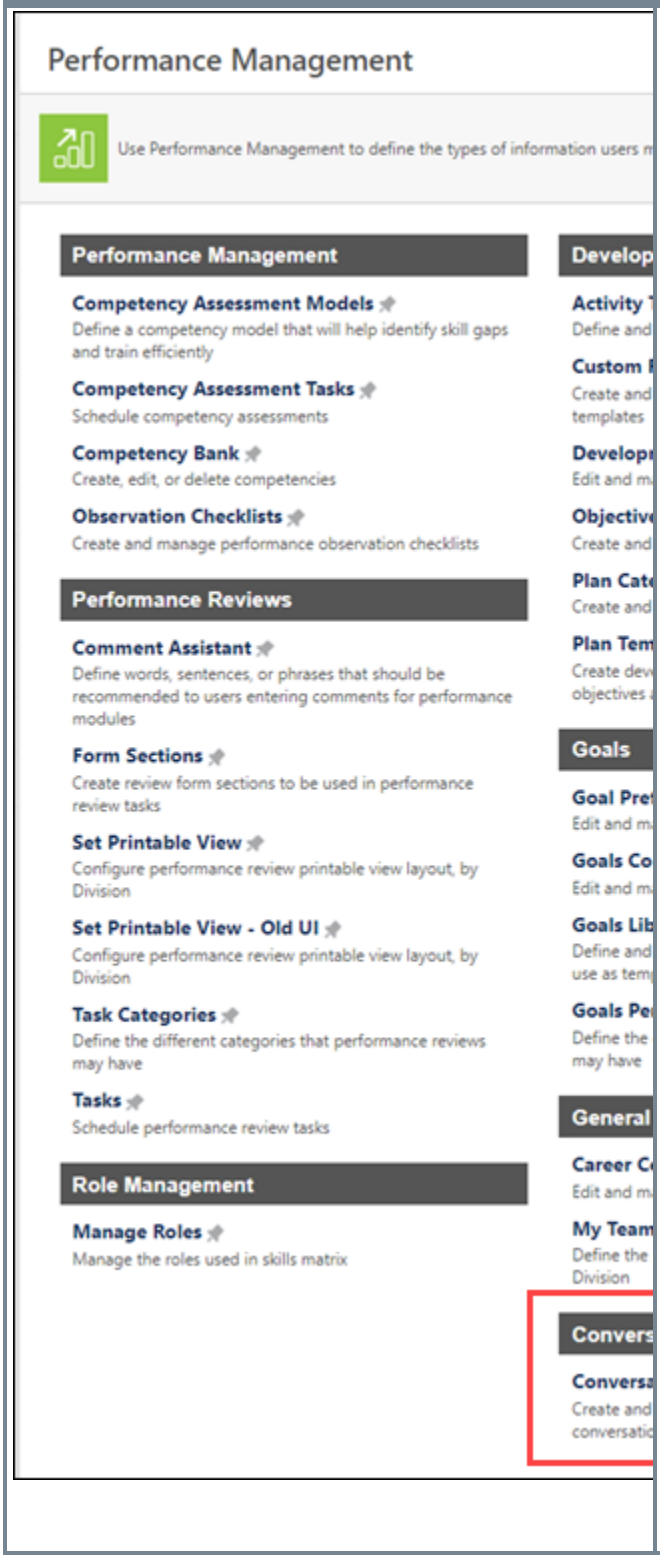
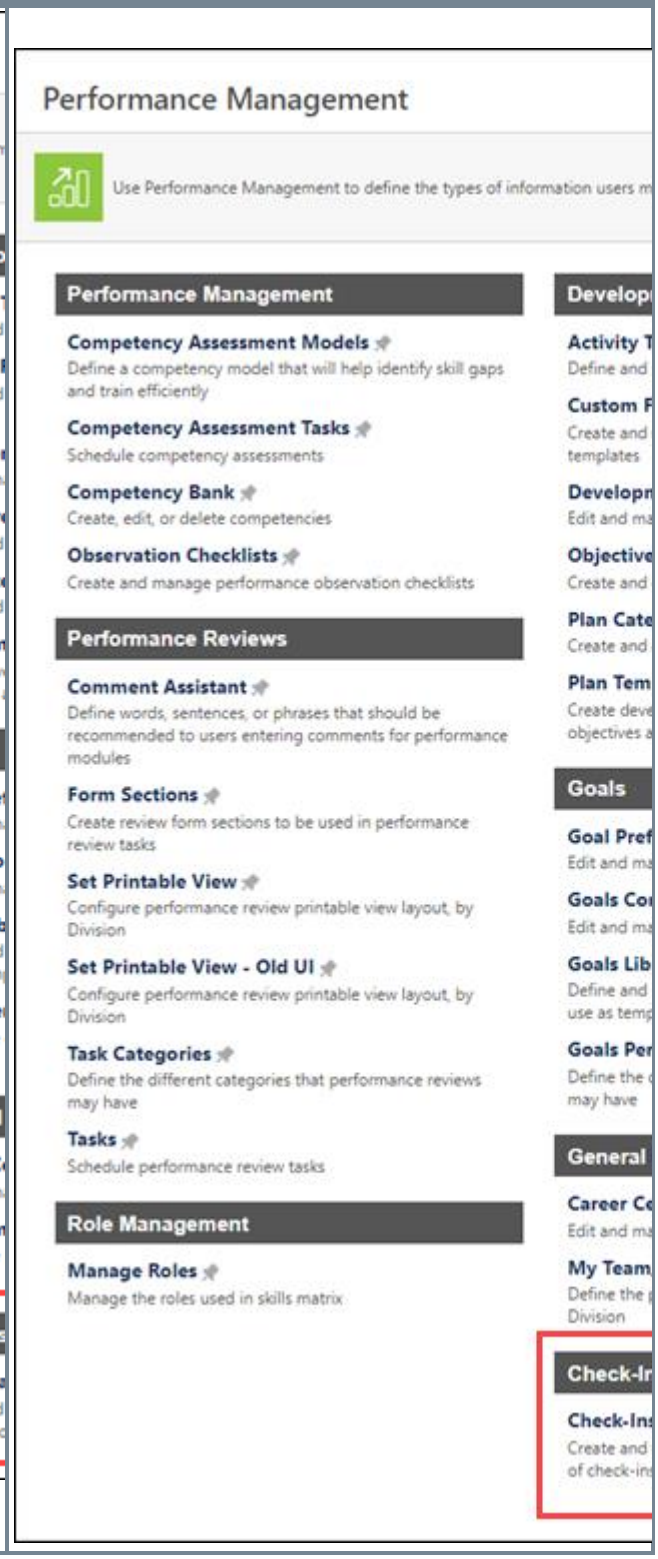
OLD NAME	NEW NAME
Conversation Created Date	Check-In Created Date
Conversation Frequency	Check-In Frequency
Conversation Is Archived	Check-In Is Archived

OLD NAME	NEW NAME
Conversation Last Activity Date	Check-In Last Activity Date
Conversation Last Modified Date	Check-In Last Modified Date
Conversation Meeting Date	Check-In Meeting Date
Conversation Name	Check-In Name
Conversation Note Has Content	Check-In Note Has Content
Conversation Template Is Active	Check-In Template Is Active
Conversation Template Title	Check-In Template Title
Conversation Topic Title	Check-In Topic Title

Performance Management Page

On the Performance Management page, "Conversations" will be changed to "Check-Ins".

To view the Performance Management page, go to ADMIN > TOOLS > PERFORMANCE MANAGEMENT.

OLD NAME	NEW NAME
	

Navigation Tabs and Links

For Navigation Tabs and Links, the option name will be changed from "Conversations" to "Check-Ins". *This name change is not available with UAT.*

Summary of Changes for End User and Manager Tasks

For end-users and managers, "Conversations" will be changed to "Check-Ins" on all titles, labels, buttons, and messaging when performing the following tasks:

- Viewing the Dashboard
- Using the create new or modify functionality
- Viewing template details
- Viewing or modifying settings
- Viewing the participant list
- Archiving topics

Summary of Changes for Guides and Client-Facing Resources

All references to "Conversations" will be changed to "Check-Ins" in the following resources:

- Online Help
- Printable Guides
- Cornerstone Success Center
- Training Guides
- Adoption Kits

Check-Ins Enhancements - Overview

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

- Check-Ins is now ready for General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA). *See* **Check-Ins - GDPR and CCPA Compliance** on page 344 *for additional information.*
- Users can now Archive and Restore Check-Ins topics. *See* **Check-Ins - Enhancements** on page 342 *for additional information.*
- Users can switch from Meeting View to Topic View. *See* **Check-Ins - Enhancements** on page 342 *for additional information.*
- All Check-Ins Reporting 2.0 fields are now available. *See* **Check-Ins - Reporting Fields** on page 346 *for additional information.*

Implementation

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

Permissions

The following existing permissions apply 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
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 - Enhancements

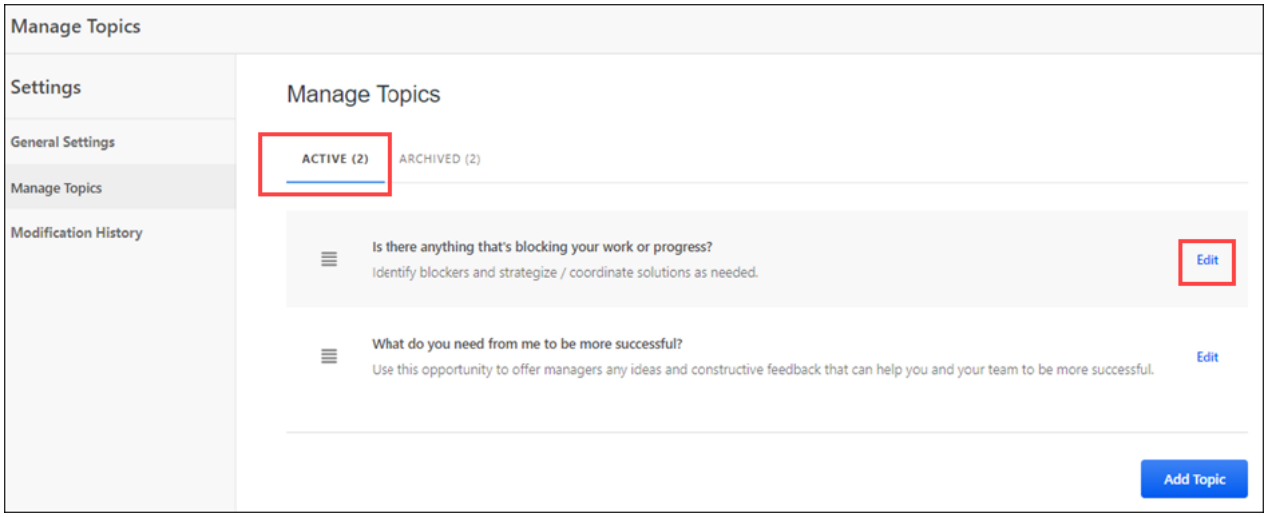
With this release, the following Check-In pages are updated to provide new functionality.

Manage Topics

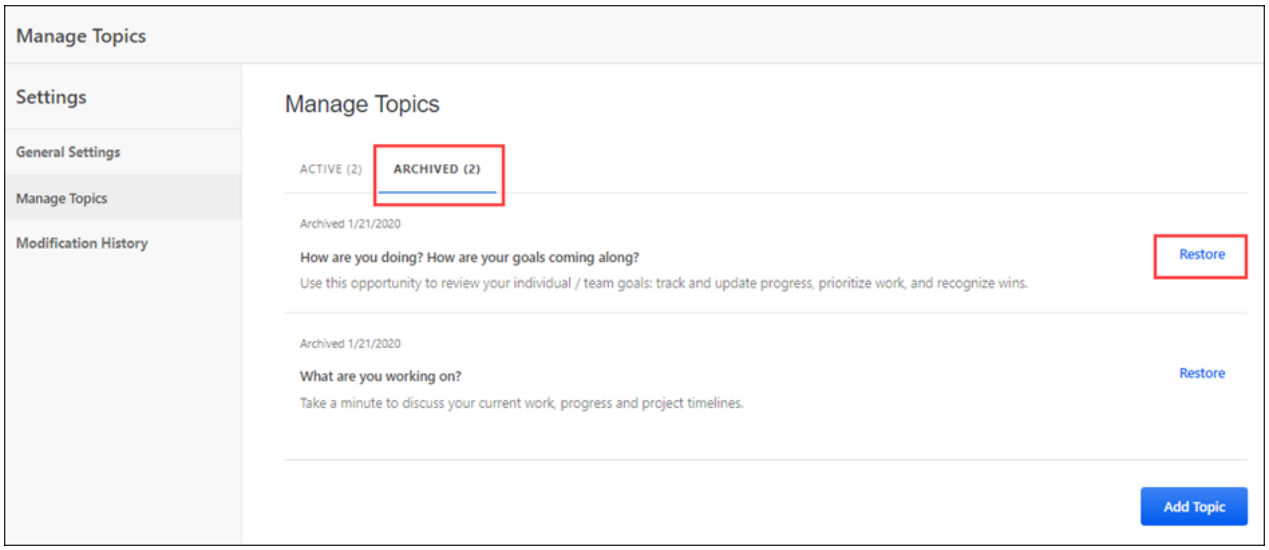
Users can now archive and restore Check-In topics.

To view the Manage Topics page, go to PERFORMANCE > CHECK-INS and then click the appropriate check-in on your dashboard. Click the Settings icon , and then click the Manage Topics tab.

- To archive a topic, go to the Active tab and click **Edit** for the appropriate topic. On the Edit Topic page, check **Archive this topic**, click **SAVE**, and then confirm that you want to archive this topic. The archived topic now appears on the Archived tab.



- To restore an archived topic, go to the Archived tab and click **Restore** for the appropriate topic. The restored topic now appears on the Active tab.

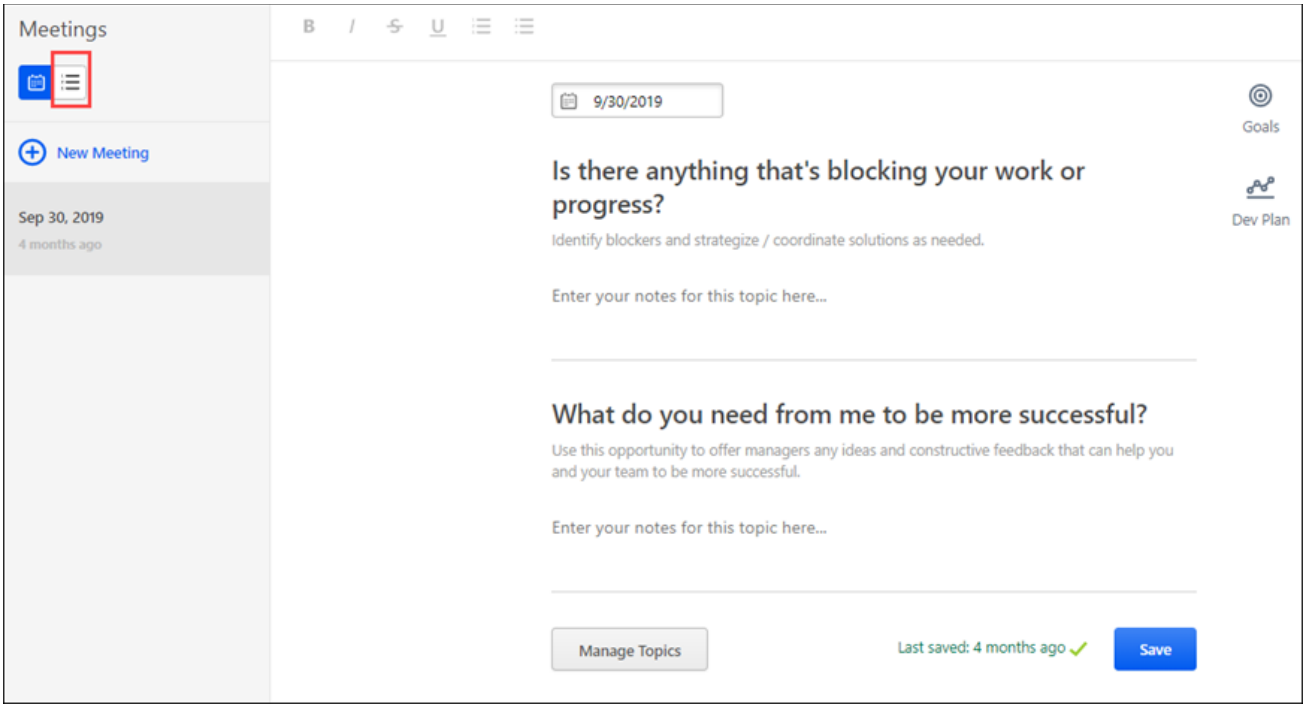


Notes

Users can now view Check-In topics in a Topic View.

To view the Notes page, go to PERFORMANCE > CHECK-INS and then click the appropriate item on your dashboard.

To switch to Topic View, click the topic icon. The page heading changes to "Topics" and displays all active topics in this discussion.



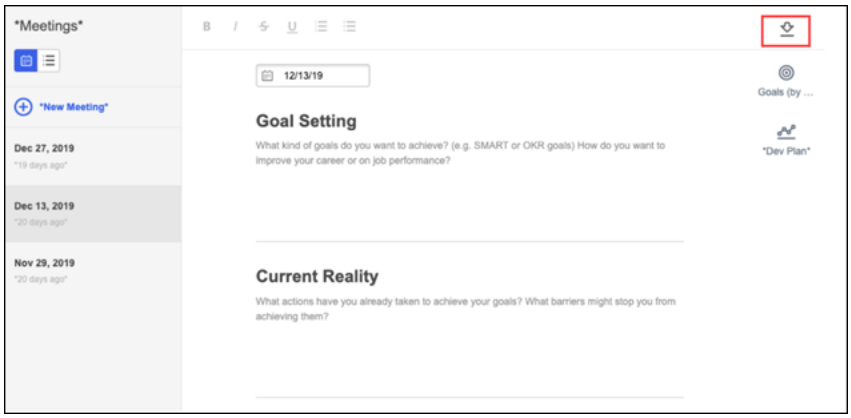
Check-Ins - GDPR and CCPA Compliance

With this release, Check-Ins will be ready for General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA).

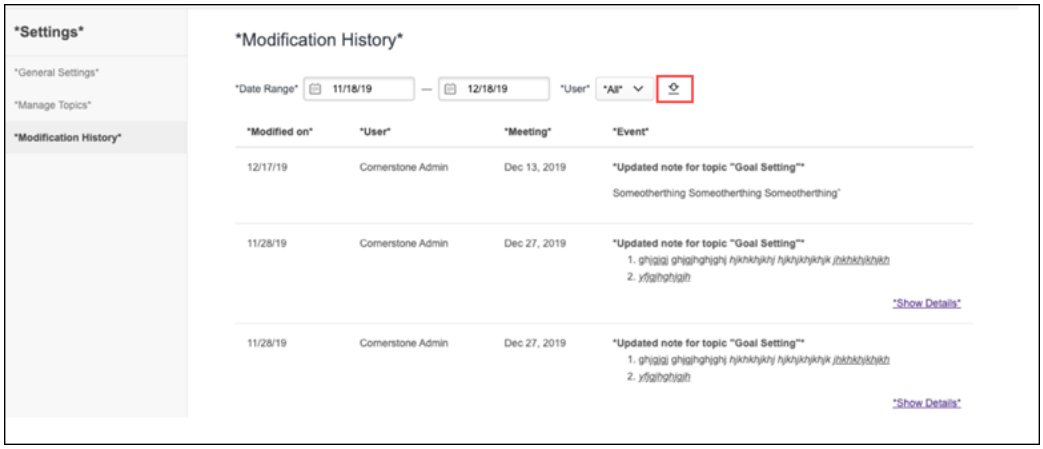
GDPR applies to organizations processing the personal data of employees in the European Union (EU). CCPA applies to the personal data of California consumers collected by businesses, service providers, and third parties. To enable compliance, Check-Ins provides solutions for the following general rights:

- Right of access and disclosure - Users can now export all meeting notes and modification history details to a PDF file.
- Right of deletion - Clients can contact GPS to configure a maximum data retention period to allow a time-based deletion of personal data related to Check-Ins. If clients request an ad hoc user-based data deletion, any Check-Ins related data is also removed/anonymized.

To download all notes for a selected meeting, click the download icon on the Check-Ins **Meetings** page.



To download the modification history for a specific meeting, click the download icon on the Check-Ins **Modification History** page.



Considerations

Neither Cornerstone, nor any vendor acting on our behalf, can guarantee GDPR or CCPA compliance, but we can provide a vehicle for clients to drive privacy compliance to its users, employees, candidates and data protection authorities.

Implementation

- PDF export is available to all clients automatically.
- Before compliance can be enforced for Check-Ins, clients must contact GPS to set up the appropriate data retention rules. Even after the data retention rules are configured, the data retention period is bound to the legal entities, so some employees might not be covered.
- If a client has already set up an active time-based deletion, it is still necessary to contact GPS as and make an explicit request to include Check-Ins as a specific type of data. Additionally, ad hoc deletion is available for all clients, but it is still necessary to contact GPS and provide a User ID before any data can be deleted.

Check-Ins - Reporting Fields

With this release, all of the following fields are available in the *Check-Ins* section in Reporting 2.0 when building a report using the Check-Ins data map.

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Check-In Is Archived	This field displays whether the check-in was archived.	Yes/No
Check-In Created Date	This field displays the date the check-in was created.	Numeric
Check-In Frequency	This field displays the meeting frequency selected by the user who created the check-in.	Text
Check-In Last Activity Date	This field displays the most recent date on which the check-in was opened, and any action was taken.	Numeric
Check-In Last Modified Date	This field displays the most recent date on which a user modified the check-in.	Numeric
Check-In Meeting Date	This field displays the scheduled meeting dates for a selected check-in.	Numeric
Check-In Name	This field displays the name of the check-in.	Text
Check-In Note Has Content	This field displays whether the check-in meeting contains notes.	Yes/No
Check-In Template Is Active	This field displays whether a template is currently active.	Yes/No
Check-In Template Title	This field displays the title of the check-in template.	Text
Check-In Topic Title	This field displays the topic title contained in a template.	Text

The following new fields are available in the *Check-Ins* > *Check-In Creator* section in Reporting 2.0 when building a report using the Check-Ins data map.

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
User Full Name	This field displays the name of the user who created the check-in.	Text
User ID	This field displays the user ID of the user who created the check-in.	Text

The following new fields are available in the *Check-Ins > Check-In Modifier* section in Reporting 2.0 when building a report using the Check-Ins data map.

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
User Full Name	This field displays the name of the user who last modified the check-in.	Text
User ID	This field displays the user ID of the user who last modified the check-in.	Text

Considerations

This functionality is automatically enabled for all organizations using Check-Ins and Reporting 2.0. These fields are only available for Reporting 2.0.

Implementation

This functionality is automatically enabled for all Check-Ins users.

Check-In Participant Alias

The following changes have been made to Check-Ins fields in Reporting 2.0:

When creating a Check-Ins Report, the name of the "User" field grouping will appear as "Check-In Participant." Since “User” is being replaced for this report type, the “Reporting - Core - User - [subgroup]” permissions no longer apply to the report. Instead, “Check-In Participant” fields utilize the existing “Reporting - Performance - Check-Ins - View” permission.

This enhancement is available in stage as of the February 5 UAT deployment.

Compensation Approvals – UP Actions Tab

Previous to this enhancement, compensation approvals were approved on the Requests tab in the user's Universal Profile. This was confusing since a compensation approval is not a request; it is a required action.

With this enhancement, compensation approvals will be moved to the Actions tab in the user's Universal Profile. None of the compensation approval functionality is changing.

This feature is not available with UAT.

Implementation

This functionality is enabled for all Compensation clients.

Development Plans

Auto-Upgrade to Development Plans Redesign with the May 2020 Release

Cornerstone's legacy Development Plan module is scheduled for deprecation with the May '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 May '20 Release to auto-upgrade to redesigned Development Plans. Clients are encouraged to auto-upgrade to the Development Plans redesign prior to the May '20 Release by self-activating via "Enable Redesigned Development Plans" in Corporate Preferences. *See Corporate Preferences.*

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

This functionality was announced with the 20 May 2019 release.

Starter Guide

Implementation

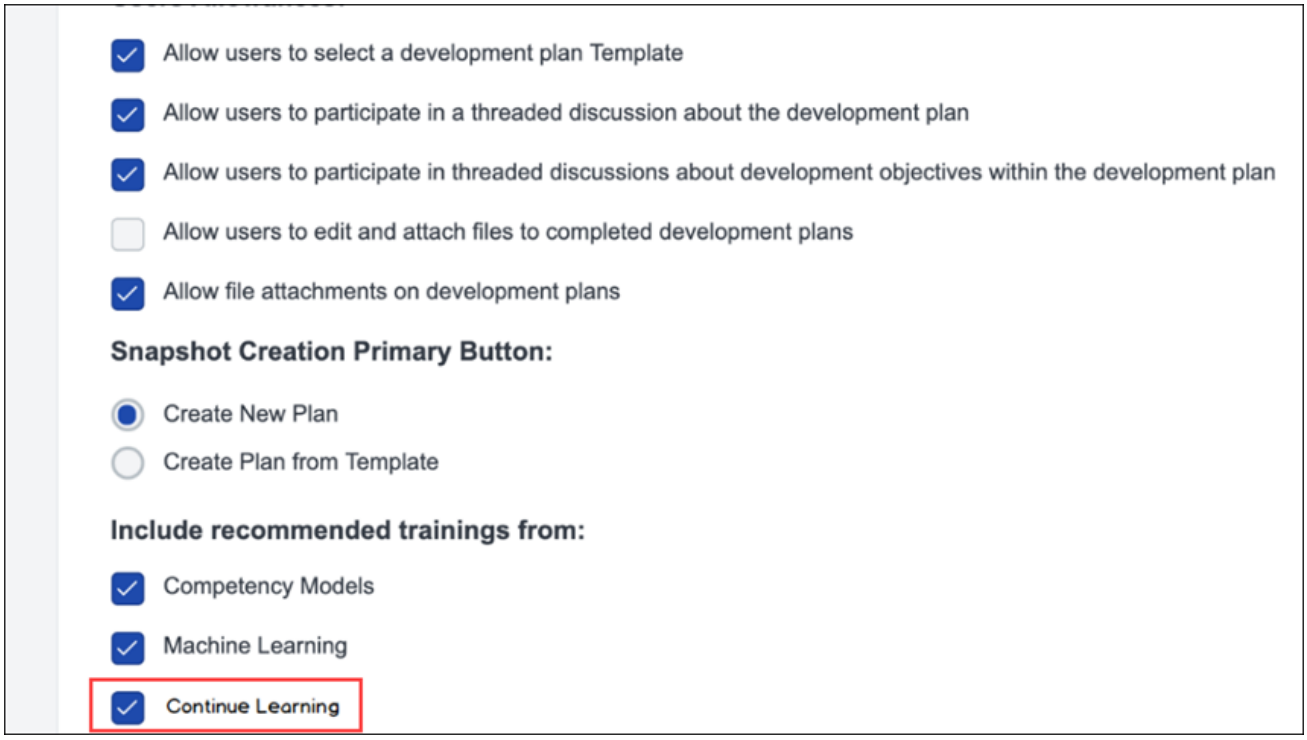
The Legacy Development Plan end-of-life is targeted for May 2020.

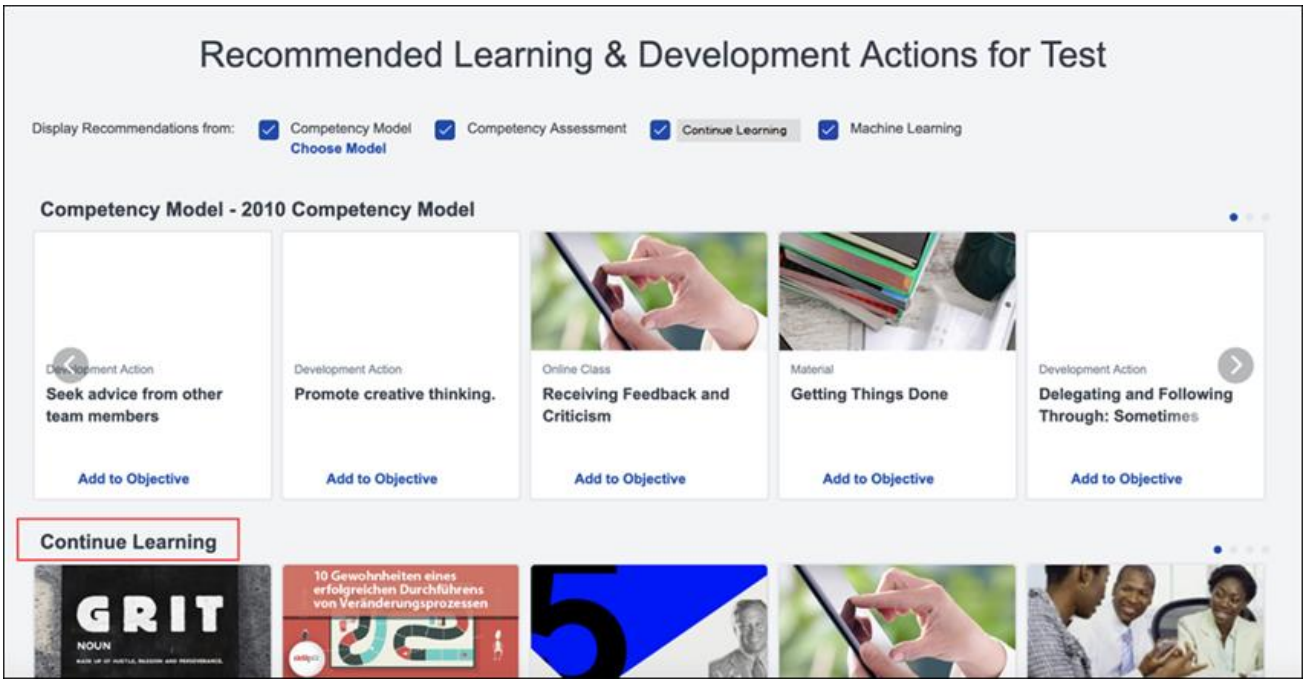
Dev Plan Preferences - Separate "Continue Learning" Carousel from Machine Learning Toggle

This feature is not available with UAT.

Previous to this enhancement, the "Continue Learning" carousel was classified under the Machine Learning Toggle on the administrative Development Plan Preferences page and on the Development Plans Learning search page.

With this enhancement, "Continue Learning" is removed from the Machine Learning toggle so that administrators can enable it separately and users can view a separate Continue Learning carousel.





How Does this Enhancement Benefit My Organization?

Clients who do not want to enable machine learning can now enable and view incomplete trainings via a separate Continue Learning carousel.

Implementation

This functionality is enabled for all clients using Development Plans.

Use Case

John is a system admin for the ABC Corporation. He explored the Machine Learning-based training recommendations in Development Plans but is not comfortable rolling it out to his company. Now, he can disable Machine Learning recommendations and enable the Continue Learning carousel to show his Development Plan users the relevant trainings that they started but did not complete.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Development Plan Preferences - Manage	Grants the ability to manage Development Plan Preferences, where various Development Plan features can be enabled or disabled according to the needs of the organization. This is an administrator permission.	Performance - Administration

Goals

Goals Enhancements - Overview

With this release, the following Goals enhancements are now available:

- Maximum Assigned Goals Enhancement - Administrators now have the capability to establish a maximum number of assigned goals in order to conform to organizational policies. *See* **Maximum Assigned Goals Enhancement** on page 357 *for additional information.*
- Dynamic Shared Goals - Teams with shared goals now have greater flexibility to remove and add contributors to the shared goals.*See* **Dynamic Shared Goals** on page 356 *for additional information.*

Implementation

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

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Create Employee Goals - Align	When creating a goal for users other than self or subordinates, this permission allows users to search for goals by user when aligning the goal with another user's goal. Users with this permission can only search for and align their goals with users who are within their permission constraints. If a user does not have this permission, then the **Search** field is not available within the Alignment pop-up. This permission works in conjunction with the Create Employee Goals permission. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Performance - Administration
Goals - Create	Grants ability for user to create goals for self (and direct and indirect reports if a manager). The permission constraints determine for whom the user can create goals. This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

Dynamic Shared Goals

This feature is removed from the February 2020 release and will be available in a future release.

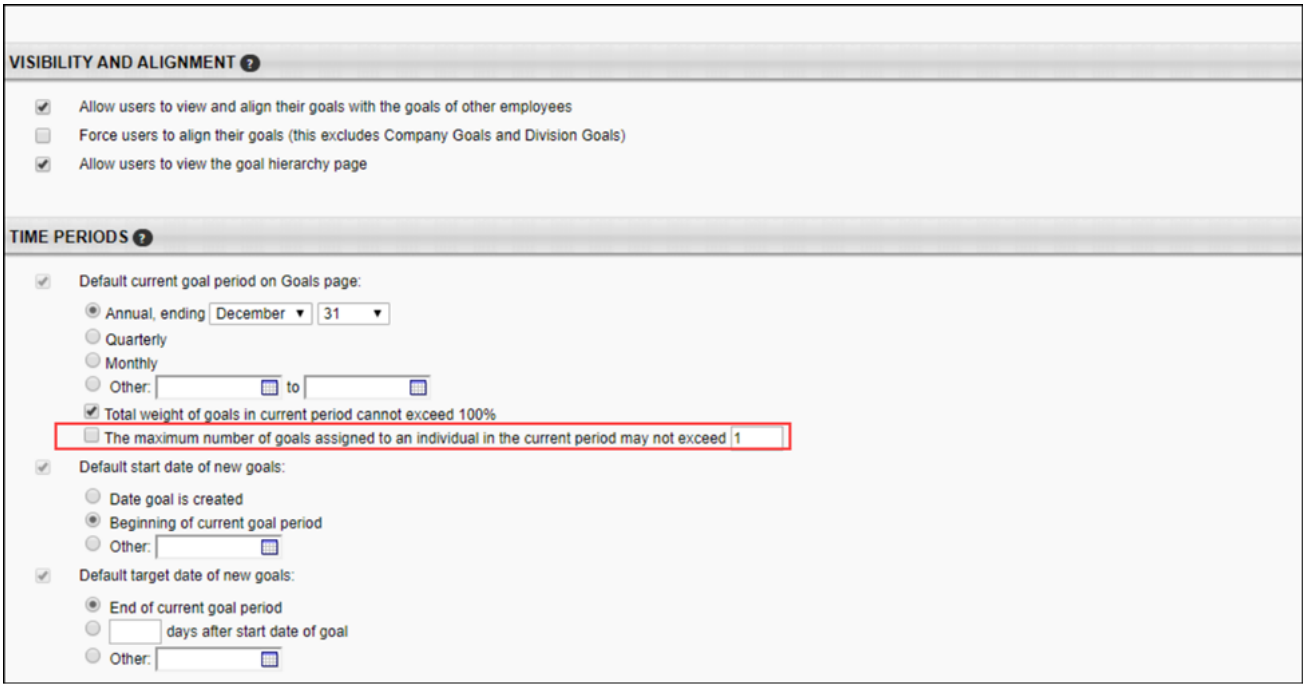
Maximum Assigned Goals Enhancement

Administrators now have the capability to establish a maximum number of assigned goals in order to conform to organizational policy.

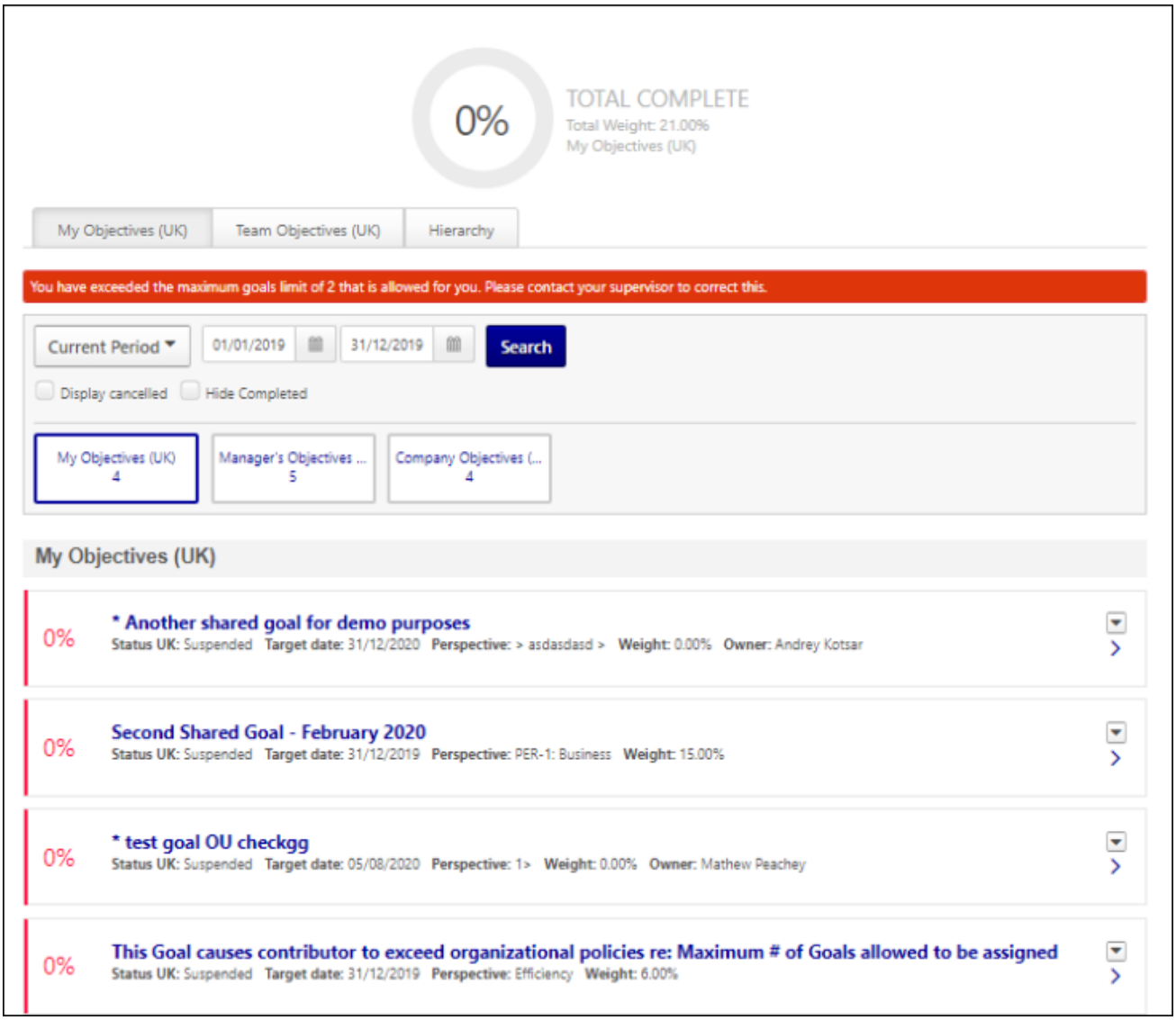
Some organizations have processes for managing goals which limit the amount of goals that can be assigned to a user. With this enhancement, if an administrator sets a maximum number of goals for an organizational unit (OU) in Goal Preferences, users in that OU are prevented from creating a new goal for themselves if the new goal will cause them to violate this policy. Administrators and managers can still create goals for others, even if the new goal causes them to violate this policy. The same holds true for dynamically assigned goals. When this occurs, a message is displayed on a user's My Goals page to inform them that the number of goals assigned to them exceeds the policy.

Additionally, administrators can now configure the Email Digest to send an automated report to users and users' managers to inform them that a user is not in compliance with the maximum assigned Goals policy of the organization.

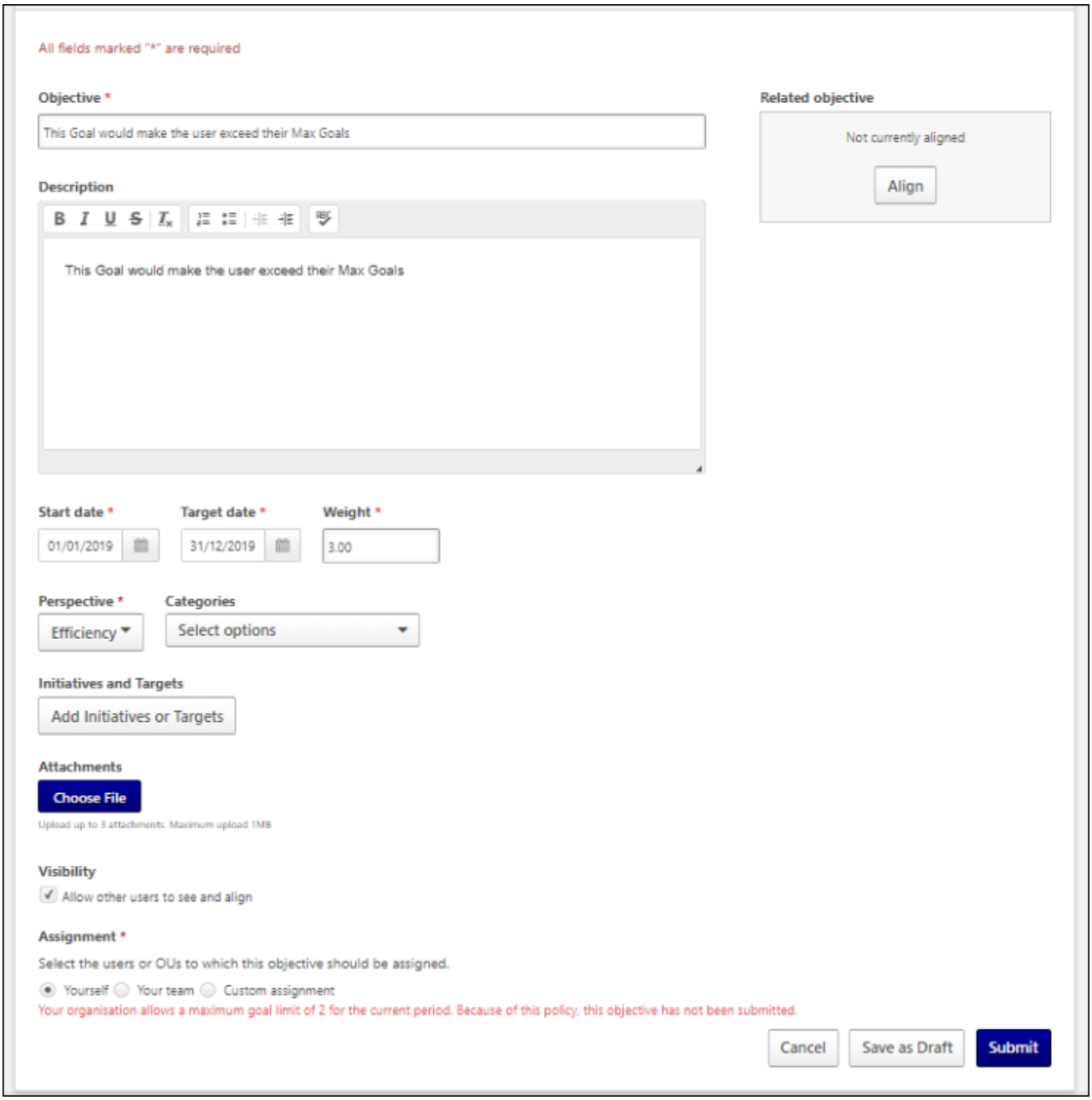
- On the Goals Preferences Page, administrators can establish a Maximum Goals allowed to be assigned policy.



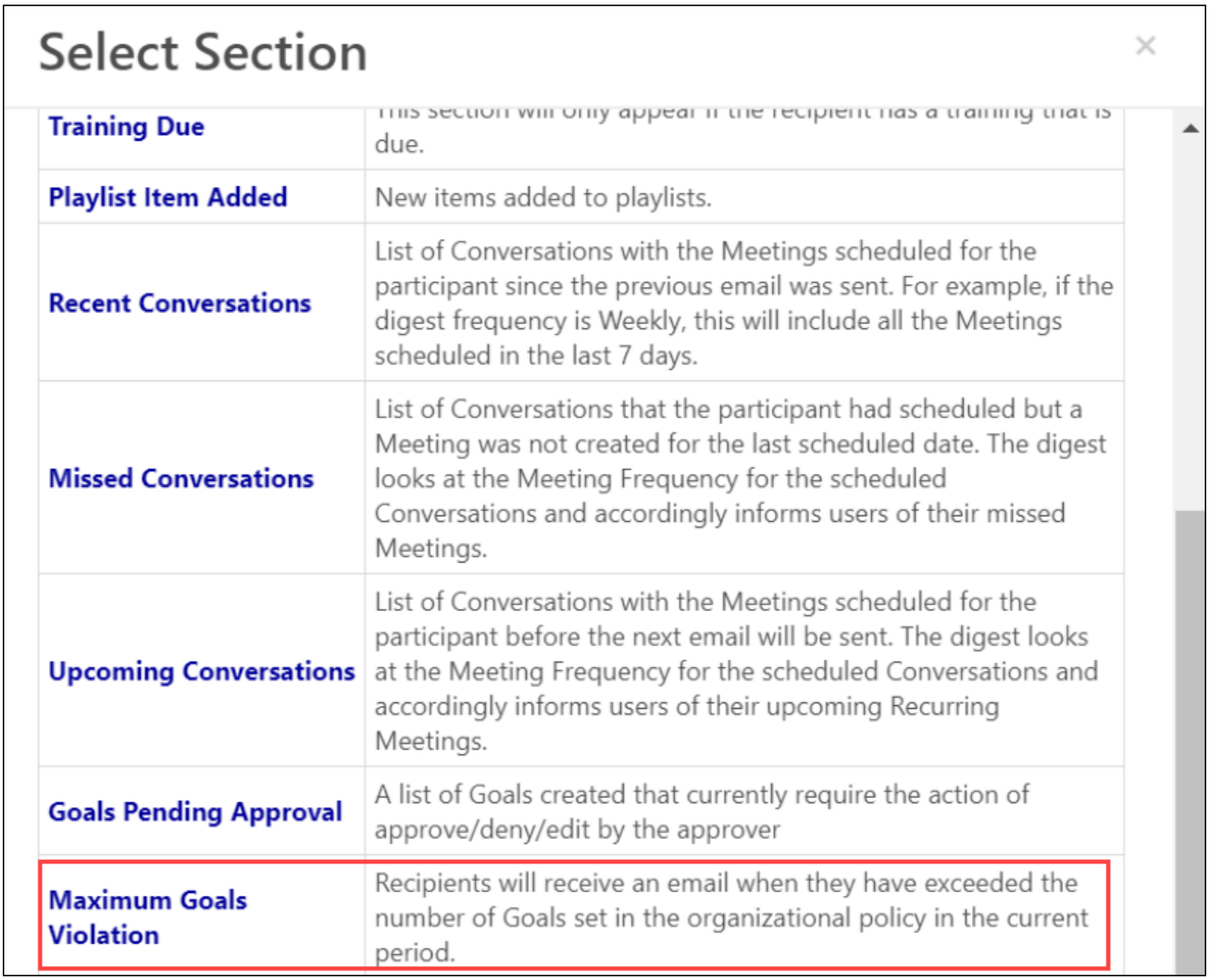
On the My Goals/Objectives Page, if an end user is in a state that violates a Maximum Goals Allowed policy, an error message appears.



If users attempt to create a Goal that would cause them to exceed corporate policy, a warning appears.



A new Email Digest option alerts managers when a user is not in compliance with the maximum assigned Goals policy of the organization.



Select Section

Training Due	This section will only appear if the recipient has a training that is due.
Playlist Item Added	New items added to playlists.
Recent Conversations	List of Conversations with the Meetings scheduled for the participant since the previous email was sent. For example, if the digest frequency is Weekly, this will include all the Meetings scheduled in the last 7 days.
Missed Conversations	List of Conversations that the participant had scheduled but a Meeting was not created for the last scheduled date. The digest looks at the Meeting Frequency for the scheduled Conversations and accordingly informs users of their missed Meetings.
Upcoming Conversations	List of Conversations with the Meetings scheduled for the participant before the next email will be sent. The digest looks at the Meeting Frequency for the scheduled Conversations and accordingly informs users of their upcoming Recurring Meetings.
Goals Pending Approval	A list of Goals created that currently require the action of approve/deny/edit by the approver
Maximum Goals Violation	Recipients will receive an email when they have exceeded the number of Goals set in the organizational policy in the current period.

Mobile Responsive - Goals, Skills Matrix, Observation Checklists, Universal Profile

With this release, we are improving the response capability on mobile devices when using the following Performance Suite pages:

- Goals - Goals List, Goals Creation, Manage Shared Goals, Pending Goals, Goals Configuration, Goals Preferences, Goals Library, Goals Perspective.
- Skills Matrix - Skills Matrix, Skills Matrix Competency Details.
- Observation Checklists - Manage Observation Checklists, Checklist Details, Checklist Report, Checklist Summary, Observation Notes.
- Universal Profile - Bio, Feedback, Feedback Details, Snapshot (Dev Plans, Goals, Reviews).

Observation Checklists and Skills Matrix pages are mobile responsive as of the December 20 patch.

How Does this Enhancement Benefit My Organization?

This update will improve the user experience on mobile devices.

Considerations

There are no changes to functionality.

Implementation

This functionality is enabled for all clients using the Performance Suite on mobile devices.

Reporting - Development Plan Field

The following field is reportable for Development Plans in Reporting 2.0

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Dev Plan Training ID	For ILT sessions, this field displays the Session ID entered by the administrator in the Session ID field on the **Details** tab when configuring the session. For other LO types, an ID is generated by the system on the back end when the learning object is created.	Text

How Does this Enhancement Benefit My Organization?

By reporting on Training IDs in Development Plans, clients can now use the import capability in the new Training Plan (TP) offline feature to a populate TP from a CSV file containing User ID and Training ID.

Considerations

This functionality is automatically enabled for all organizations using Performance and Reporting 2.0. This field is only available for Reporting 2.0.

Implementation

This functionality is automatically enabled for all Performance users.

Succession

Flash No Longer Needed to Run SMP PowerPoint Template Report.

With the November 15 patch, the SMP PowerPoint Template Standard Report no longer needs Adobe Flash enabled to upload a template. The Flash icon has been removed and users will be prompted to upload a template be default.

This functionality was announced with the 15 November 2019 patch.

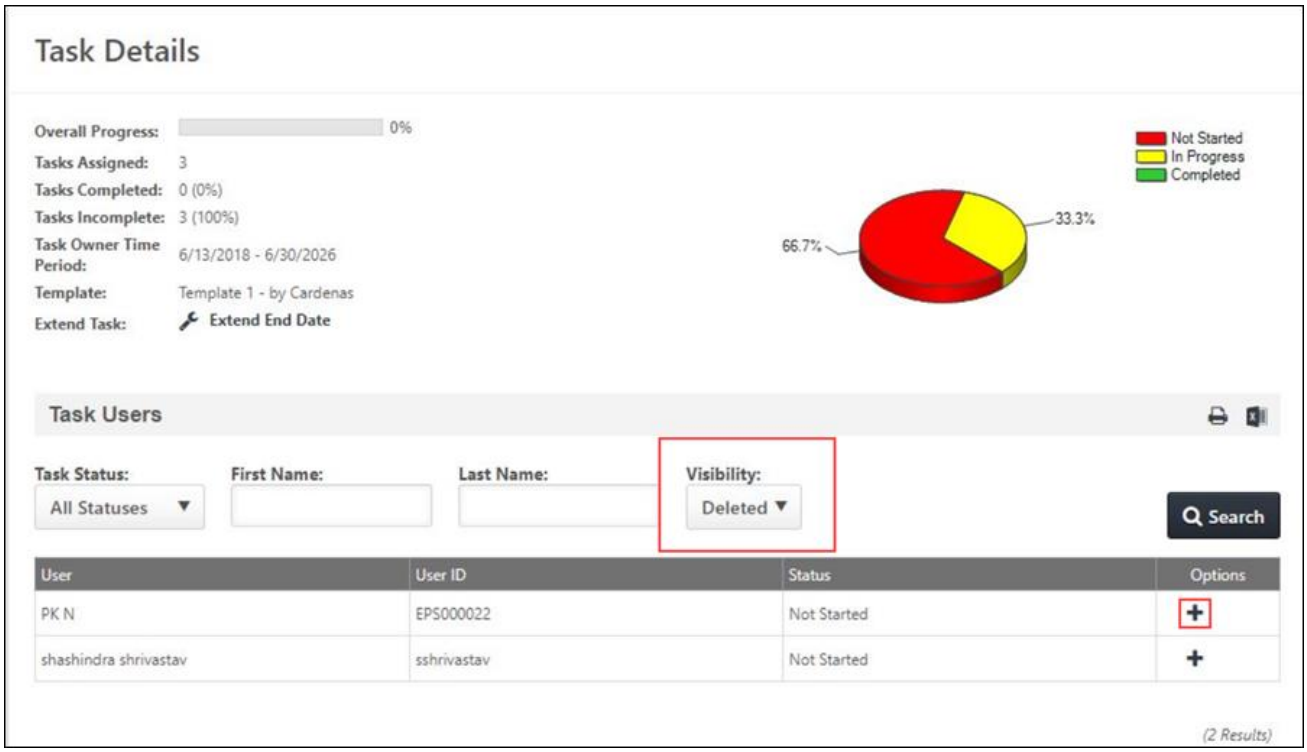
Implementation

This functionality is automatically enabled for all organizations.

Restore Deleted Users to Succession Tasks

Prior to this enhancement, administrators were unable to restore users that were previously deleted from a Succession task.

With this enhancement, the Task Details page now provides a **Visibility** drop-down that administrators can use to view active and deleted users. Additionally, a plus sign icon is provided in the **Options** column to restore users that were deleted from an active Succession task.



Considerations

Restoring an assessor to a Succession task restores any work that the assessor did in the task before being removed, but does not trigger any notifications.

Implementation

This functionality is automatically enabled for all organizations using CHR and is available for all 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

Broadbean OFCCP Integration

Note: *This functionality was previously made available as part of the 1 November 2019 patch release.*

OFCCP Compliance provider with non-government partnerships, which acquires Cornerstone job listings and distributes to state workforce agencies and their technology partners.

Implementation

This integration is a vendor-built integration and not by Cornerstone. More information and instructions can be found in **Edge Integrate**. Available 4 November 2019.

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

Candidate Messaging & SMS (Pilot)

Candidate Messaging & SMS (Pilot) - Overview

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.

For the February '20 release, Candidate Messaging is available from both the Manage Candidates and Applicant Profile pages.

How Does this Enhancement Benefit My Organization?

- Fast and effective communication with candidates
- Communications can be tracked visibly across the recruiting team so that multiple team members can engage with the candidate without causing confusion or excessive overlap

Use Case

Joe applies to a sales job at company ABC. Alice, one of several recruiters working on the requisition, sees Joe's application and wants to reach out to the candidate.

Alice selects Joe in Manage Candidates and clicks Send Message from the More drop-down. A flyout containing the messaging interface appears, and Alice types and sends a message asking Joe for a phone interview.

Joe receives an email notifying him of an unread message about his application at ABC. Since he supplied a working mobile phone number as part of his application, he also receives a similar notification via SMS. Joe clicks the link in one of the notifications and is taken to a Web experience where he reads Alice's request for a phone interview. Joe uses the messaging interface to respond to Alice with his availability.

Alice's colleague Bob, who is also working the queue of newly submitted applications for the requisition, does not know that Alice has already considered Joe because Alice forgot to update Joe's status. Bob reviews Joe's application and decides he would like to reach out to Joe. However, once he selects Joe and clicks Send Message, he sees that Alice has an ongoing conversation with Joe in another tab and that she has already reached out to Joe for an interview. Bob updates Joe's status and lets Alice know that he corrected Joe's status.

Alice is notified by email that Joe has responded to her message. She logs in to her Cornerstone portal and navigates to the Candidate Message page, where she selects Joe's message thread in her inbox. After coordinating schedules, Alice selects a time and replies to Joe with a confirmation of his interview and contact details.

A week later, Alice has decided to advance Joe and two other applicants to the final round of interviews. Alice uses the candidate messaging interface to select the candidates who will not be moving forward and sends them a bulk message informing them of their status.

She also selects Joe and the two other advancing candidates and sends them a bulk message informing them that ABC would like to move forward with them in a final round of interviews.

Joe and the two other applicants individually receive Alice's message and coordinate interview dates separately with Alice.

Implementation

For the February '20 release, this feature is only available to pilot program participants.

Permissions

The following new permission applies to this functionality, which is added to the Requisition Owner and Applicant Reviewer by default:

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

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note**: This is a dynamically assigned permission that is not available in Security Role Administration. If the*	Recruiting

	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.*	

Send Candidate Messages

Candidate Messaging gives recruiters the ability to send candidates an instant message within the Cornerstone Recruiting application. The candidate will receive an email, or in some cases an SMS, notifying them of the recruiter's message. The candidate can respond to the recruiter using a link in the notification, which will take them to a similar messaging experience on their desktop PC or mobile device.

Recruiters can view their own conversation with a candidate as well as any other users' conversations with the same candidate, allowing for easy cross-team visibility.

When used with SMS, Candidate Messaging offers recruiter's messages a much greater level of immediacy and reach. SMS commands significantly higher user engagement - a five times greater open-message rate and an eight times greater click-through rate - compared to email. In a competitive labor market, better visibility should significantly increase the ability to grab candidates' attention.

Send Candidate Message

Messages can be sent to one candidate or multiple candidates at a time.

To send a message:

1. Click **Send Message** from the **More** drop-down on Manage Candidates. This opens the message flyout for either single candidate messaging or bulk messaging. Note: Bulk messaging is only available from Manage Candidates.
2. The list of recipients displays in the **To:** box.
3. Enter a message in the **Message** box. There is no character limit.
4. Click **SEND**. This sends the message via email or SMS, depending on the service set up in your portal.

SMS Service

With SMS service, candidates receive SMS notifications if they supply a working phone number on their application. SMS uses the phone number to send messages from the candidate messaging application to a candidate's mobile device.

The SMS service lets you:

- Programmatically provision new sub-account and long-codes for a given customer
- Programmatically send unread message notifications to candidates via SMS messages using a customer's provisioned long-codes
- Track usage and billing information at a sub-account level
- Export or otherwise report on usage and billing information for your Finance team

When you have SMS set up in your portal, messages that you send to candidates are sent via SMS instead of email.

Candidate Messaging Inbox for Recruiters

With this enhancement, a new Candidate Message page is added to Recruiting. The Candidate Message page acts like an inbox for recruiters to view and send candidate messages. A candidate's entire message history is available from this page and is visible to the recruiting team.

You can send instant messages directly from this page for real-time communication with your candidates.

To access the inbox, go to RECRUIT > CANDIDATE MESSAGES. The inbox is available from mobile devices or desktop.

Permissions

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

Message Board

Messages sent by you and the recruiting team to the candidate display on the main message board. You can view your messages and those of the recruiting team by clicking through each user's message board.

At the bottom of the board, you can send new instant messages to the candidate.

Active Messages

Active messages display on the left panel. These are considered active communications with candidates for the job.

If there are any unread messages, a blue circle appears to the left of the candidate's name.

Archived Messages

You can archive an exchange so that the messages no longer appear in the Active panel.

To archive an exchange, click **Archive** at the bottom of the board.

Candidate Experience

For candidates, your messages are received via email or SMS, which includes a link to reply to the message. Candidates can respond to messages from the new inbox experience on the My Profile page of the career site.

Candidate Inbox

The inbox on the My Profile page of the career site displays the candidate's message history. Messages sent and received can be viewed, and candidates can also send messages from this application.

When candidates reply to messages, recruiters are notified via email.

Message Status

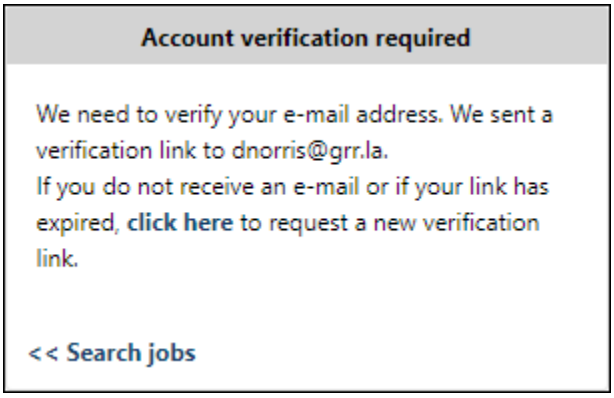
This section indicates whether the candidate has any new messages. Candidates can click the number of messages to open communications from you.

Candidate Email Verification

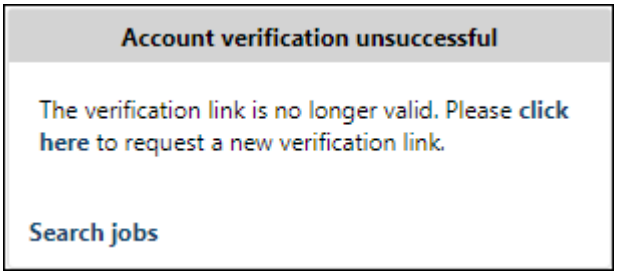
Before this enhancement, any user could create a profile on a career site by using an email address. Once the profile was created, the user would then have access to the profile, regardless of whether they actually had access to the email address they used to create the account. This created a security concern as it might be possible for person 1 to apply as a guest and for person 2 to create a profile using person 1's email address. If this were to happen, person 2 would have access to person 1's application data.

With this enhancement, administrators can require candidates to verify their email address before gaining access to sensitive application materials via My Profile on the career site. Verification is performed when the candidate clicks a verification link in a system-generated email that is automatically sent when they create their account. The link opens the career site, where a message appears indicating whether the verification was successful. From here, candidates can quickly access the job search page and their My Profile page.

Note: *The email that is sent to the candidate is not customizable. This is a system-generated email. In order for the email to fire, a default "from" email address must be present in a backend setting. The backend setting can be configured by contacting Global Product Support.*



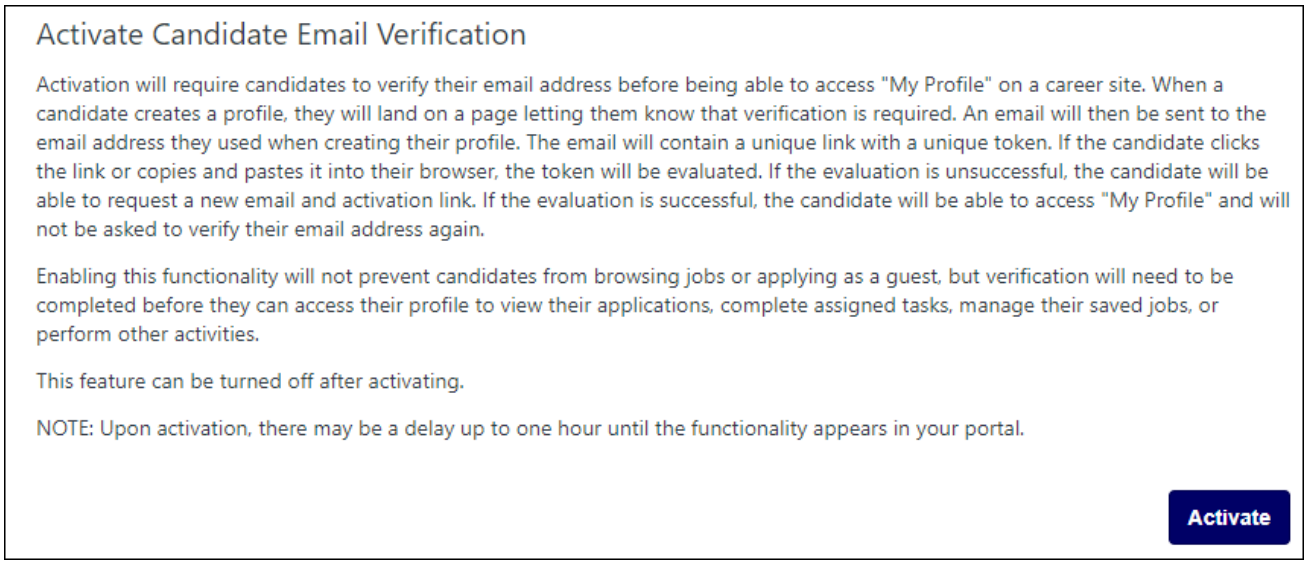
If a candidate attempts to verify their email using an invalid verification link, or if they attempt to verify after the link has expired, they will see a message informing them that their verification was unsuccessful. They will be able to request a new verification link by clicking a link in the message.



Activate Candidate Email Verification

Administrators can activate and deactivate Candidate Email Verification from Feature Activation Preferences. Click **ACTIVATE** to activate the functionality. Once activated, you can deactivate this feature by clicking **DEACTIVATE**.

To access Feature Activation Preferences, go to ADMIN > TOOLS > RECRUIT > FEATURE ACTIVATION PREFERENCES.



Use Case

Karen is a Recruiting Admin at Acme. She wants to ensure her candidates' application data is secure, so she enables the Candidate Email Verification functionality on her portal.

Tim applies for a job on the Acme career site. Upon completing his application, Tim has the option to create a profile. Tim chooses to create a profile, and after entering the required information he sees a message letting him know that an email has been sent to him so he can verify his email address. Tim receives the email, clicks the link inside it, and is taken to a verification page. Tim sees a message letting him know his email has been successfully verified, and he can now access his profile. Tim reviews his profile and sees his application information.

Implementation

Upon implementation, this functionality is available for all portals using Recruiting.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Recruiting Feature Activation Preferences - Manage	Grants ability to access and manage Feature Activation Preferences in Recruiting. This permission cannot be constrained. This is an administrator permission.	Recruiting Administratio n

Clinch Talent Integration

Note: *This functionality was previously made available as part of the 1 November 2019 patch release.*

Cornerstone and Clinch seamlessly integrate to deliver an optimized candidate experience to help talent acquisition teams recruit more effectively with less manual effort. Covering every step of the candidate journey - from first visit to the careers site all the way through apply, hire and pre-boarding.

Clinch Talent uses Cornerstone's Recruiting APIs to retrieve data from your Cornerstone portal. Requests made by Clinch Talent using these APIs will count toward your overall throttling limit for Cornerstone's APIs. If you have other integrations, including custom integrations, that use Cornerstone's APIs, you will want to ensure that the overall usage across all your integrations is within the throttling limits for Cornerstone's APIs. Throttling limits for Cornerstone's APIs are documented in the API Explorer.

Implementation

This integration is a vendor-built integration and not by Cornerstone. More information and instructions can be found in **Edge Integrate**. Available 4 November 2019.

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

Enhance the Manage Candidates Applicant Carousel

Enhance the Manage Candidates Applicant Carousel - Overview

Prior to this enhancement, recruiters had to exit Manage Candidates in order to evaluate a candidate's full application, read application comments, and take action. This process took many clicks and created a challenging workflow.

With this enhancement, the resume carousel on Manage Candidates will be replaced by an applicant carousel. This is accessed when selecting a candidate and clicking **View Resume** from the **More** drop-down on Manage Candidates.

The applicant carousel is a centralized location for recruiters to evaluate a candidate's application, assess their qualifications, and easily take actions on a candidate. Recruiters can evaluate the resume and prescreening questions, read and write contextual information about the candidate, and take actions without navigating to another page. This reduces the time it takes to hire the right candidate and improves recruiter satisfaction.

How Does this Enhancement Benefit My Organization?

- Single location for all applicant details
- Simultaneous access to an applicant’s resume while writing comments enabling recruiters to take notes quicker and easier than before
- Prescreening questions and responses on the same page as other candidate details
- Change applicant status quickly
- Increase comments volume for a wider variety of feedback
- Ability to add or move an applicant to a new requisition

Use Cases

Recruiter: View Resume

Sam is a recruiter at ACME and uses Manage Candidates daily to manage all candidates across all requisitions. Sam is actively looking to fill an Account Manager position. She has three new submissions she would like to review for this requisition, so she filters candidates by that requisition and the status of New Submission. She then selects all candidates and clicks View Resume. This opens the new Manage Candidates applicant carousel where she can view all candidate details and paginate through the selected candidates. For each candidate, suggested referral, and employee, she will see one of the following:

- Resume file and parsed resume details, with the ability to toggle between the two views
- Resume only
- Parsed resume details only
- A LinkedIn card linking Sam to the candidate's LinkedIn profile
- A LinkedIn card and parsed resume details

Sam would also like to view a single candidate's resume. To do this, she can select the candidate and click **View Resume**.

Recruiter: View Prescreening Questions

Sam asks many prescreening questions in the Account Manager position, such as years of experience as an account manager.

When viewing a candidate from Manage Candidates, she has direct access to a candidate's prescreening questions and answers. These are displayed below the candidate's resume.

Recruiter: Change Status and Add/Move to Requisition

Sam will continue to be able to change a candidate's status directly from the new applicant carousel and can also trigger the add/move to functionality.

Recruiter: Read and Write Application Comments

Sam is conducting a phone interview for a new position. Before the phone interview, she opens the candidate's applicant carousel on Manage Candidates.

Using the new carousel, Sam views the applicant's resume and takes notes on the candidate.

Once she is done with the phone interview, Sam changes the candidate's status, closes the new carousel, and requests feedback from a hiring manager.

Note: *This feature is not available at the start of user acceptance testing (UAT) for the February '20 release but will be available at a later date during UAT.*

Considerations

- Prescreening question scores and correct/incorrect indicator are visible on the Manage Candidates page. These features are not available at the start of UAT but will be available at a later date during UAT.
- "Title and Instruction" type prescreening questions are not included.

Implementation

The following features are not available at the start of UAT for the February '20 release but will be available at a later date during UAT:

- Add comments on the new carousel
- View comments on the new carousel
- Read feedback (with permission)

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This	Recruiting

	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.	
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 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.*	Recruiting

Applicant Carousel Page

The applicant carousel is a single access point to everything you need to know about a candidate to make informed hiring decisions. This page provides application information about each candidate, including their resume and contact information.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting

Candidate's Contact Information

The candidate's name, email, phone number, and location appear at the top of the page. If the candidate applied via LinkedIn, a link to their LinkedIn page is also available.

Contact information is only visible if configured by the administrator to be available and not hidden.

Note: *The visibility of contact information is also dependent upon anonymous applicant settings. See Applicant Profile Page Overview for more information about anonymous applicants.*

Overview Section

The following information is available in the Overview section:

- **Requisition** - This field shows the requisition title and ID.
- **Application Status** - This field shows the candidate's current status and the amount of time they have been in the status.
- **Applied On** - This field shows the date the applicant applied.
- **Source** - This field shows how the applicant applied. For example, if they applied via LinkedIn, then "LinkedIn" appears. If they were manually added, then "Added Manually" appears. If they applied via a career site, then the name of the career site appears. *See Applicant Profile Page - Summary Tab for more information about sources.*
- **Referral Details** - This field shows you if the candidate was referred by an employee and their relationship.

Candidate Actions

You can take the following actions from the applicant carousel:

Change Candidate Status

To change the candidate's status:

1. Click Change Status in the **Application Status** field. This opens a Change Status flyout.

2. Select the new status. Required statuses cannot be bypassed.
3. Select an effective date.
4. Click **SAVE**. This updates the candidate's status.

Note: *Statuses can be defined as required by the administrator when* ***configuring the job requisition template*** *and by the recruiter when* ***configuring the job requisition****.*

Add/Move to Requisition

You can add or move candidates to a different requisition, using the Add/Move to Requisition feature. To add/move a candidate:

1. Click Add/Move to Requisition. This opens the Add/Move to Requisition flyout.
2. Select Add to Requisition to add a candidate to a different requisition.
3. Select Move to Requisition to add a candidate to a different requisition.
4. Search for and select one or more requisitions. Available requisitions that match your search criteria appear in the Open Requisitions column.
5. Check the box next to each requisition you want to add/move the candidate to.
6. Select the following options in the Selected Requisitions column:
   A. **New Status** - Select the status in which the candidate will be placed when they are added/moved to a different requisition. Required statuses are marked with an asterisk and cannot be skipped. The New Submission status is selected by default. The Closed status is not available to select, as applicants cannot be added or moved to a requisition in a Closed status.
   B. **Send Email To** - Check the box to send an email to the requisition owner and/or the potential applicant, notifying them that the candidate has been added or moved to the requisition. Both boxes are unchecked by default. ***Note:*** *If the new requisition requires applicants to complete certain steps prior to submitting their application, the email can be configured in Email Management to include a link for the applicant to apply directly to the requisition. Further, the application materials for the new job are pre-populated with the applicant's existing information.*
7. Click **SAVE**.

For more information about considerations and frequently asked questions, see the **Manage Applicants - Add to Requisition** and **Manage Applicants - Move to Requisition** topics in Online Help.

Comments

UAT Availability Note: *The ability to add and view comments is not available at the start of user acceptance testing (UAT) for the February '20 release. This feature will be available at a later date during UAT.*

You can enter comments about the candidate in the Comment section. Once you click **POST**, your comment appears in the Comment section.

Comments from other users also appear in the Comment section.

Resume Section

If the candidate uploaded a resume, the resume appears in the Resume section below the Overview section. You can download a PDF of the resume, as well.

For candidates who filled out their resume when completing their application, their resume details appear in this section. When a resume has been parsed, you will be able to view both the resume file and parsed resume details.

When an applicant applies with their LinkedIn resume, this will replace a resume file. An applicant can have both a LinkedIn and parsed resume.

You will also see internal employees resumes rather than their universal profile.

Prescreening Questions Section

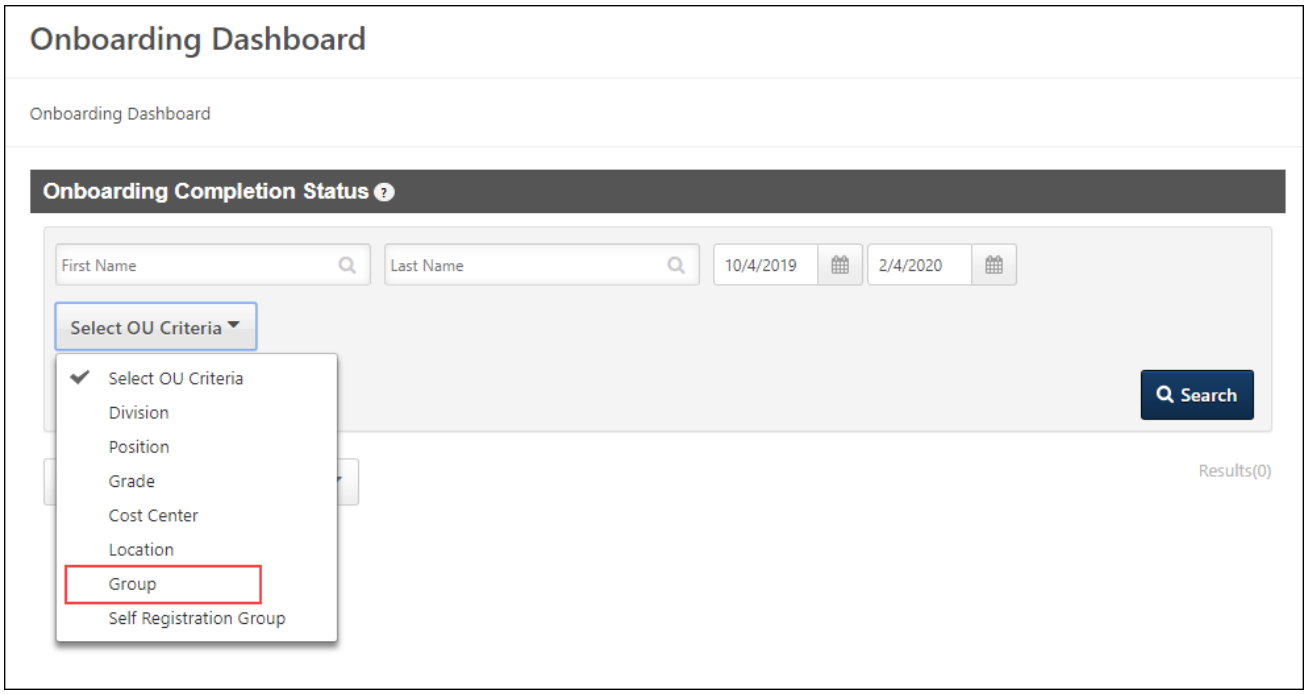
Any pre-screening questions that were included in the application appear in the Pre-Screening Questions section. Both the question and the candidate's answer appear.

Group Filter Removed from Onboarding Dashboard

Note: *This functionality was previously made available as part of the 6 December 2019 patch release.*

Prior to this enhancement, a **Group** option was available from the **OU Criteria** filter on the onboarding dashboard. However, groups are not supported when starting onboarding for new hires, so when the filter was used, no results were returned.

With this enhancement, the **Group** option is removed from the filter. This is being done to alleviate confusion and improve the onboarding experience.



Implementation

Upon implementation, this functionality will be available for all portals using Onboarding.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Onboarding: Manage	Grants ability to manage user onboarding in the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU, User's OU, and User Self and Subordinates.	Employee Onboarding

Employee Onboarding: View	Grants ability to view the Onboarding Dashboard and the Onboarding tab on the Universal Profile. This permission can be constrained by OU, User's OU, and User Self and Subordinates.	Employee Onboarding

HireRight Global Employment Screening Integration

Note: *This functionality was previously made available as part of the 20 December 2019 patch release.*

The HireRight Global Employment Screening integration lets you order any of the HireRight 200+ global background screening and drug testing services directly from within Cornerstone. Status updates are provided in real-time, providing you with fast and reliable visibility into screening orders.

If you are using the legacy HireRight integration, please contact HireRight to begin the migration process.

Migration

If your company has an assigned HireRight Account Manager, contact them directly and they will guide you through the migration process.

If your company does not have an assigned HireRight Account Manager, contact HireRight Customer Support and tell them you want to be migrated to the Cornerstone Edge HireRight integration, and the HireRight Customer Support representative will start the migration process.

Implementation

This integration is available on 23 December 2019. This integration is a vendor-built integration and not by Cornerstone. More information and instructions can be found in **Edge Integrate**.

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

Hiring Manager Experience: Request Candidate Feedback

Hiring Manager Experience: Request Candidate Feedback - Overview

Prior to this enhancement, a method was not available for sharing multiple candidates with one or more recipients in a streamlined workflow. An applicant's resume could be shared, but this could only be done on a single-candidate, single-recipient, single-requisition basis. Further, when recipients accessed the link provided when sharing candidates, they had no opportunity to leave comments or structured feedback on the candidate. This process made it difficult for hiring managers and recruiters to align and get valuable feedback documented in the system.

With this enhancement, recruiters can share candidates with hiring managers or business stakeholders at any point in the recruiting process and across all available requisitions. The request candidate feedback feature is a single workflow, allowing hiring managers to provide feedback quickly, reducing time to screen and hire the right candidates. In addition, this feature allows recruiters and hiring managers to better align on applicants and key competencies.

How Does this Enhancement Benefit My Organization?

- Request candidate feedback anytime during the hiring process. An applicant may be in any status, and feedback may be requested multiple times.
- Share candidates with any user in your organization.
- Configurable feedback options enabled you to share a candidate with or without requesting feedback.
- This feature is beneficial for a committee hiring experience as it allows you to share candidates with a group of individuals.
- Hiring managers will be able to see application comments left on the applicant by a recruiter. This way, they can get the full picture when leaving feedback.
- The new feedback experience is completely mobile friendly, so hiring managers and business stakeholders can leave feedback on the go.
- Single Sign-On support from feedback request link in email.
- Limit who can view feedback by using the privacy feature.

Use Cases

Use Case 1 - Request Feedback

1. Max is a Hiring Manager at ACME and has a new open Product Manager requisition. Max meets with Jack the recruiter at ACME to review position requirements. After their intake meeting, Jack interviews various candidates for the new position. A few candidates feel like great fits for the organization, so he would like to get Max's feedback.
2. To determine if Jack should advance these candidates through the recruiting process, Jack shares these candidates with Max. From Manage Candidates, Jack selects all candidates, and then selects Request Feedback from the More drop-down.

3. This opens a fly-out where Jack can write a message about the selected candidates and configure his request. Because comments have been enabled by the system administrator, Jack requests feedback from Max and allows Max to write comments.
4. Jack sends the request to Max and sends himself a copy of the email.
5. Not only will Max get an email letting him know feedback is being requested, but also Jack has the option to copy and paste a direct link to the application details of the group of shared candidates. Upon sharing the candidates, Jack will see a modal with the option to copy and paste a link. Because Jack and Max frequently use a chat application, Jack also copies the link and pastes it into their chat conversation. This allows Max and Jack to continue working within the tools of their daily schedule. This SSO supported link will take all recipients to the group of shared candidates.
6. Max also receives an email requesting feedback on candidates for the Product Manager role. The email includes all candidate's names and the message about the cohort of candidates left by Jack.
7. Both the link and email direct Max to a new page with all shared candidates. Here, Max can view the candidate's parsed resume, resume file, LinkedIn URL if the candidate applied with LinkedIn, prescreening questions, and application comments. In addition Max can see the candidate's status in a requisition, as well as their address, phone number, source, and referral details.
8. Here, Max can say advance or do not advance and can add open comments about each candidate.
9. Max will only see candidates that have been shared by Jack in this workflow. If Jack has shared candidates with Max from a different day, Max will have to access that group of candidates via the other email or link.
10. Once Max leaves feedback, Jack receives an email letting him know feedback has been submitted. Max clicks the link and is taken to the new Applicant Carousel on Manage Candidates. Here, he reads all submitted feedback.

Use Case 2 - Configure Comments

1. Jill is an administrator at ACME and is very excited about the new Request Candidate Feedback feature. However, she does not want Hiring Managers to write open comments about each candidate.
2. Jill goes to the administrator settings and turns open comments OFF for the request candidate feedback feature. When this is turned off, recruiters only have the option to request a response to the question, "Do you with to Advance or not Advance this candidate?"

Use Case 3 - Provide Hiring Manager with an Update

1. Sarah is a Hiring Manager at ACME and has a new open Account Manager requisition. Sarah meets with Jack the recruiter to review position requirements. After their intake meeting, Jack interviews various candidates for the new position. None of the candidates meet Sarah's ideal qualifications, so Jack continues vetting candidates. Two weeks pass, and Sarah requests an update from Jack on the new position.
2. Jack would like to share a few candidates he has interviewed with Sarah to keep her in the loop and aware of his process. Jack selects candidates from Manage Candidates,

most of whom are in the Closed status. Next, he searches for Sarah and includes a message about the cohort explaining why these candidates were not qualified. Jack does not select Request Feedback or Enable Comments because he is just giving Sarah an update.

3. Sarah receives an email letting her know Jack has shared candidates for the Account Manager role. The email also includes a message from Jack about the group of candidates. This message was written when Jack selected and shared the candidates.
4. Upon clicking Review Candidates, Sarah is taken to the new cohort page where she can see the candidate's resume, prescreening questions, and all application comments.
5. Sarah reads the application comments left by Jack for each candidate. This allows Sarah to stay included in the recruiting process and enables Sarah and Jack to align on next steps.

Implementation

The following features are not available at the start of user acceptance testing (UAT) for the February '20 release but will be available at a later date during UAT:

- Optimized mobile view for new cohort page. ***Note:*** *This feature is still functional on your mobile device but will not have the final design until later in UAT.*
- The ability to assign the new manage private comments permission. This means everyone who has access to the cohort page or manage Candidates, will be able to read all feedback.

Upon implementation, this enhancement is available for all organizations using Recruiting.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Private Comments	Grants ability to read all advance/do not advance feedback when reviewing candidates in Manage Candidates. ***Note:*** *All users who have the Applicants: Comments - Manage permission upon implementation of this enhancement will be assigned the Manage Private Comments permission automatically.*	Recruiting Administratio n
Request Candidate Feedback Search	This permission can be constrained and is connected to the user OU service. By default, there are no constraints and upon deployment all users with the manage requisition and requisition owner permission	Recruiting

	will receive this permission. After the February '20 release, clients will need to manage this permission manually.	

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
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 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*	Recruiting

	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.*	

Request Candidate Feedback

With the new feedback request feature, recruiters can:

- Request candidate feedback from anyone in the organization at any point in the recruiting process
- Have an email sent to recipients, with a direct SSO link to the candidate review page
- Allow recipients to recommend advancing or not advancing a candidate and leave comments when configure
- Request feedback even if a candidate is in a Closed or Hired status

How to Request Feedback

To send a feedback request:

1. Navigate to the Manage Candidates page.
2. Select **Request Feedback** from the **More** drop-down. This opens a feedback request flyout that lets you configure your request.
3. Search for users to request feedback from. Or, select a user from the Recommended section, which is a list of the hiring manager and requisition reviewers who are already associated with the requisitions that are part of your request.
4. Click **CONTINUE**.
5. Add a message to the recipients. This is optional. ***Note:*** *If you exit the request without submitting it, your message text will not be saved.*
6. Configure the following feedback preferences:
   A. **Request candidate feedback** - This option is checked by default. When checked, recipients are required to select an advance or pass option when submitting feedback.
   B. **Allow comments** - This option is checked by default. When checked, recipients will have the option to leave comments about the candidate. Recipients will not be required to leave comments. If you uncheck this option, then the Comment section will not appear for reviewers.
7. Check **Email me a copy** to send a copy of the feedback to yourself.
8. Click **CONTINUE**. This submits your requests and opens a pop-up with an SSO link you can copy and include in other applications, such as a chat.

Once your request is submitted, reviewers receive an email with a link to the feedback page. If you entered a message in your request, the email will include your message. *See* **Give Candidate Feedback** on page 400 *for additional information.*

Request Candidate Feedback Emails

With this enhancement, emails are added to Email Administration to notify recruiters and hiring managers about candidate feedback request actions. These emails will be configured by your system administrator.

To access the Email Administration page, go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT.

Permissions

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

New Emails

The following emails are added to the Recruitment action type in Email Administration:

EMAIL NAME	EMAIL DESCRIPTION	ACTION TYPE
Request Candidate Feedback	This email is triggered when a recruiter has selected a list of candidates and shared them with the recipient. This email can be sent to Hiring Manager and Reviewers. 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 Management. ***Configuration Note:*** *When creating this email, be sure to include the COHORT.LINK tag so that recipients have quick access to the candidate review page, which is where recipients provide comments*	Recruiting

	and determine whether to advance or not advance the candidate.	
Feedback Submitted from Request Candidate Feedback	This email is triggered when a business stakeholder has been shared a candidate and has submitted feedback. This email can be sent to Request Candidate Feedback Sender. 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 Management.	Recruiting

The following is a sample email for the "Feedback Submitted from Request Candidate Feedback" email:

Dear RECIPIENT.FIRST.NAME

USER.SUBMITTING.FEEDBACK.FIRST.NAME
USER.SUBMITTING.FEEDBACK.LAST.NAME has left feedback on CANDIDATE.NAME for JOB.TITLE (JOB.REQUISITION.ID), JOB.OU.LOCATION.TITLE on ACTION.DATE.

FEEDBACK.VOTE

FEEDBACK.COMMENTS

Click here to read MANAGECANDIDATE.APPLICANT.SUMMARY

Thank you.

New Email Tags

The following email tags are added:

EMAIL TAG	DESCRIPTION
COHORT.LINK	Displays as a link that opens the candidate review page.
FEEDBACK.REQUESTOR	Name of user who requested feedback.
USER.SUBMITTING.FEEDBACK.FIRST.NAME	First name of user who submitted feedback.

EMAIL TAG	DESCRIPTION
USER.SUBMITTING.FEEDBACK.LAST.NAME	Last name of user who submitted feedback.
FEEDBACK.VOTE	Vote by feedback submitter to advance or not advance candidate.
FEEDBACK.COMMENTS	Comments by feedback submitter about candidate.

Give Candidate Feedback

A candidate feedback request is an opportunity for hiring managers and business stakeholders to quickly review candidates for a requisition and provide feedback on the candidates. The request is sent by a recruiter to any user in the organization from whom they would like to get candidate feedback. The request can be sent at any point in the recruiting process and can include multiple candidates across multiple requisitions.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Private Comments	Grants ability to read all advance/do not advance feedback when reviewing candidates in Manage Candidates. ***Note:*** *All users who have the Applicants: Comments - Manage permission upon implementation of this enhancement will be assigned the Manage Private Comments permission automatically.*	Recruiting Administratio n

How do I receive a Feedback Request?

When recruiters ask for feedback on candidates, their request is sent to you by email. The request includes a link to the candidate review cohort page. From the cohort page, you can view a candidate's application details, advance or not advance the candidate, and view other users' feedback if visible. You can also comment about a user, if you have permission to comment.

What happens if I get more than one feedback request for the same candidate in the same job?

Each request is considered a separate request. Any required feedback will need to be completed on both requests.

What kind of feedback can I give?

The following feedback options may be available when viewing the candidate review cohort page, depending on the kind of feedback the requester has asked for and your permissions:

Advance/Don't Advance

The ability to advance or not advance a candidate is only visible if enabled by the recruiter when creating the feedback request.

If this section is visible, then you are required to select an **ADVANCE/DON'T ADVANCE** option before you can submit feedback. Advancing a candidate means you think they should move forward in the application process. Not advancing a candidate means you think they should not progress beyond the current step in the process.

Comments

You can enter comments about the candidate in the Comment section, if comments have been enabled by the system administrator and the recruiter has configured their request to allow comments.

Once you click **SUBMIT**, your comments appear along with other users who have provided comments. In addition, an email is sent to the recruiter to let them know you submitted feedback. Providing comments is not required.

Comments that have been provided for the candidate by other users appear at the top of the Comments section.

For hiring managers, you cannot view comments by other hiring managers unless you have permission to manage private comments.

Note: *Any changes you make to your comments after they have been sent initially will send an email to the recruiter notifying them that your comments have been updated.*

Candidate Details on Candidate Review Cohort Page

The following information is available about the candidates:

Recruiter's Feedback Message

If the recruiter included a message in their feedback request, you can read this message via email.

List of Candidates to Review

All candidates that the reviewer is being asked to review are listed in the left-side panel. The list is grouped by requisition and includes the candidate's name and location.

To view a candidate, click the candidate's name.

Candidate Contact Information

The candidate's email and phone number appear at the top of the page. If they applied via LinkedIn, a link to their LinkedIn page is also available.

Contact information is only visible if available and not hidden. Considerations are also made for anonymous applicants. *See Applicant Profile Page Overview.*

General Application Overview

The following information is available in the Overview section:

- **Requisition** - This field shows the requisition title and ID.
- **Status** - This field shows the candidate's current status in the application workflow.
- **Application Received** - This field shows the date the applicant applied.
- **Application Source** - This field shows how the applicant applied. For example, if they applied via LinkedIn, then "LinkedIn" appears. If they were manually added, then "Added Manually" appears. If they applied via a career site, then the name of the career site appears.

Candidate Resume

If the candidate uploaded a resume, the resume appears in the Resume section below the Overview section. You can download a PDF of the resume, as well.

For candidates who filled out their resume when completing their application, their resume details appear in this section. When a candidate’s resume file has been parsed, you will be able to toggle between the two views.

Pre-Screening Questions

Any pre-screening questions that were included in the application appear in the Pre-Screening Questions section. Both the question and the candidate's answer appear.

Submit Your Feedback

Once you have completed your feedback, click Submit. This sends an email notification to the requester to let them know you have completed your feedback.

SHL Talent Assessments Integration

Note: *This functionality was previously made available as part of the 20 December 2019 patch release.*

The SHL Talent Assessments integration lets recruiters identify best-fit candidates, using targeted, predicted assessments, and provides an engaging, candidate-centric experience to help you attract the top candidates. This integration is available for clients using SHL TalentCentral.

If you are using the legacy SHL Select2Perform, please reach out to your SHL Account Manager to discuss the upgrade to SHL TalentCentral.

Migration

Both the SHL Talent Assessments and the SHL Select2Perform integrations can be used simultaneously. However, in order to use SHL Talent Assessments it is necessary to be on SHL Talent Central.

If you are using the legacy SHL Select2Perform, it is necessary to work with SHL to migrate. The new integration only works for mobile-friendly workflows and currently only supports one numeric value for the assessment score to be displayed.

Implementation

This integration is available on 23 December 2019. This integration is a vendor-built integration and not by Cornerstone. More information and instructions can be found in **Edge Integrate**.

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 - Overview

With this enhancement, information and actions that were previously only available on the Manage Applicants, Suggested Referrals, and New Submissions pages have been moved to Manage Candidates so that recruiters can use one access point to more efficiently and effectively manage all their candidates for all their requisitions.

How Does this Enhancement Benefit My Organization?

- Direct links to Manage Candidates:
  - Get quick access to suggested referrals and new submissions on the Manage Candidates page from Manage Requisitions
- New information on the Manage Candidates page:
  - View the suggested referrer's name and relationship directly in the Source column
  - Filter candidates by source
  - Filter candidates by application flag
  - View total pre-screening question score - (***Note:*** *This feature is not available at the start of user acceptance testing (UAT) for the February '20 release but will be available at a later date during UAT.*)
  - View integration results
  - Add/remove application flags
- New actions: Additional actions will be available in upcoming patch and quarterly releases, including the following
  - Assign Integrations
  - Assign Form
  - Request Reference Letters
  - Invite to Interview Event

Implementation

Direct links to Suggested Referrals and New Submissions on Manage Candidates will be enabled in Stage portals with the February ’20 release but will not be enabled in Production portals until the May ’20 release. Clients wishing to use the functionality in Production before the May ’20 release can enable the associated backend setting.

Additional feature availability:

- **Assign Integrations** - Available in Stage portals with the 21 February 2020 patch release. Available in Production and Pilot portals with the 6 March 2020 patch release.
- **Assign Forms** - Available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release.
- **Request Reference Letters** - Available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release.
- **Invite to Interview Event** - Available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: View Assessment Integration Status and Details Link	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. 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.	Recruiting
Applicants: View Assessment Integration Status	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. 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.	Recruiting
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 Administratio n
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 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.*	Recruiting

Simplifying Manage Candidates Enhancements

As part of the effort to simplify the recruiter experience with Manage Candidates, information and actions that were previously only available on the Manage Applicants, Suggested Referrals, and New Submissions pages have been moved to Manage Candidates. These updates are made so that recruiters can more efficiently and effectively manage all their candidates across all their requisitions on Manage Candidates.

Suggested Referrals and New Submissions

With this enhancement, when accessing suggested referrals and new submissions from Manage Requisitions, recruiters are redirected to Manage Candidates.

- **Suggested Referrals** - Previously, clicking a link in the Referrals column on the Manage Requisition page opened the legacy Suggested Referrals page. With this enhancement, clicking a link in the Referrals column on the Manage Requisition page opens a filtered view of Manage Candidates. The requisition and status filters will be updated to show only suggested referrals from the selected requisition. This enables recruiters to take action on the relevant suggested referrals, and then they can modify their filters on Manage Candidates to action more candidates, or they can use their browser's back button to return to Manage Requisitions.
- **New Submissions** - Previously, clicking a link in the New Submissions column on the Manage Requisition page opened the legacy New Submissions page. With this enhancement, clicking a link in the New Submissions column on the Manage Requisition page opens a filtered view of Manage Candidates. The requisition and status filters will be updated to show only new submissions from the selected requisition.

General Manage Candidates Enhancements

The following additional enhancements are made to Manage Candidates as part of simplifying the recruiter experience and are available as part of the February '20 release:

- **Candidate Source Filter** - A new **Candidate Source** filter is added to the left panel to enable recruiters to filter candidates based on their source. For more information about applicant sources, see the following:
  - *See Applicant Sources.*
  - *See Manage Candidates Page (Early Adopter).*
  - *See Applicant Profile Page - Summary Tab.*
- **Application Flag Filter** - Application flags have been added to the existing **Candidate Flags** filter, which has been renamed **Flags**. Recruiters can now use the **Flags** filter to filter candidates by applicant flags and/or application flags.
- **Suggested Referrer Name and Relationship** - 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 also appears. For more information about referral relationships, see the following:
  - *See Referral Preferences.*
- **Application Flags** - Application flags can now be added and removed. Previously, only applicant flags could be managed on Manage Candidates. Flags are managed by

selecting one or more candidates, and then clicking **Manage Flags** from the More drop-down.

- **View Pre-Screening Question Score** - Total pre-screening question score will be available to display on Manage Candidates. Recruiters can choose to make the column visible. ***Note:*** *This feature is not available at the start of user acceptance testing (UAT) but will be available at a later date during UAT.*
- **View Integration Results** - Integration status and results are now available to display on Manage Candidates. Recruiters can choose to make the integration columns visible, and the results are available by clicking the results link in the integration's column. ***Note:*** *This feature is not available at the start of UAT but will be available at a later date during UAT.*

The following features are available as part of upcoming patch and quarterly releases:

- **Assign Integration** - Recruiters will be able to assign an integration to one or more candidates. Integrations can be assigned by selecting one or more candidates, and then clicking **Assign Integration** from the **More** drop-down. ***Note:*** *The ability to assign integrations from Manage Candidates will be available in Stage portals as part of the 21 February 2020 post-release patch for the February '20 release. This feature will be available in Production and Pilot portals as part of the 6 March 2020 patch release.*
- **Assign Forms** - For users with permission to assign recruiting forms, this feature lets you assign forms to candidates. This **feature is currently available from Manage Applicants**. For Manage Candidates, this feature is available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release.
- **Invite to Interview Event** - This feature lets you invite candidates to interview events. This **feature is currently available from Manage Applicants**. For Manage Candidates, this feature is available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release.
- **Request Reference Letters** - This feature lets you request reference letters from candidates. This **feature is currently available from Manage Applicants**. For Manage Candidates, this feature is available in Stage portals with the 6 March 2020 patch release. Available in Production and Pilot portals with the 8 May 2020 quarterly release.

Sterling RISQ Background Check Integration

Note: *This functionality was previously made available as part of the 1 November 2019 patch release.*

A background screening solution between Cornerstone Recruiting and Sterling's RISQ platform that frees teams from manual, time consuming tasks related to screening program, while also providing real-time screening results directly into Cornerstone.

- Initiate a background check within Cornerstone Recruiting. The candidate information/required screening package is then automatically sent to Sterling.
- The candidate receives an email containing a link to complete consent, confirm and provide additional information and, if applicable, select a drug test location.
- Status of the background check is shared in real-time in Cornerstone Recruiting.
- Upon completion, the results are posted within Cornerstone Recruiting.

Implementation

This integration is a vendor-built integration and not by Cornerstone. More information and instructions can be found in **Edge Integrate**. Available 4 November 2019.

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

Talent Plus TalentBank Integration

Note: *This functionality was previously made available as part of the 15 November 2019 patch release.*

The Talent Plus integrations provides a seamless candidate experience and easy access to Talent Plus assessment recommendations and results.

When a Talent Plus assessment is associated to a job requisition, candidates are taken to Talent Plus to complete the assessment. The Talent Plus system sends the results back to Cornerstone, including the recommendation statement and score, as well as a link to the candidate's results.

Implementation

This integration is a vendor-built integration and not by Cornerstone. More information and instructions can be found in **Edge Integrate**. Available 18 November 2019.

Security

The following existing permissions apply to this functionality:

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