Cornerstone February 2021 Release Notes

Table of Contents

Release Notes for February 2021

What's New for February '21

The following release resources are available within Online Help:

o **Printable Release Notes** - This topic provides a printable version of all release notes content. *See Printable Release Notes.*

o **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 '21 Release** on page 23 *for additional information.*

o **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 '21 Release** on page 26 *for additional information.*

o **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 '21 Release** on page 28 *for additional information.*

o **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 '21 release:

Careers Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Check-Ins – Attach Documents to a Template	Yes	With this enhancement, administrators and HR organizations can provide supplemental information to their organizations by uploading and attaching documents to a Check-Ins template.
Check-Ins – Home Page Enhancement for Follow-Ups	Yes	With this enhancement, when you click a red overdue or yellow due-soon number on the Check-Ins homepage, the side panel highlights these items in matching red or yellow for quick identification.
Goals API - Lock Goals	Yes, for clients that purchased the Cornerstone Foundational APIs in Edge.	With this enhancement, when goals are updated, a new Lock Goals endpoint now respects all rules regarding locking and unlocking goals enforced in customer portals. This applies to the Goals API when used with Careers and Performance.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reporting Field – Development Plans	Yes, for Reporting 2.0	The following new field is reportable for Development Plans in Reporting 2.0: Development Plan Training Item Completion - Indicates that a specific training item in a Development Plan is "Completed" or "Not Completed".

Content Anytime Features

FEATURE NAME	DESCRIPTION
Leadership and Management Subscription Update	Create stronger managers across your organization with leadership and management training focused on motivating and engaging employees in the modern workplace. With this subscription, teach managers how to unite their employees around a shared vision, make high stakes decisions in the moment, cultivate a positive, outcome-oriented culture, and develop the systems needed to effectively manage team priorities. Leadership & Management subscribers will automatically receive the subscription update at the February '21 Release.
Modern Compliance Subscription Update	Ensure compliance and minimize risk across your organization with content designed to target real behavior change and eliminate bias, harassment, injuries, data breaches, and more. With this subscription, fulfill General HR Compliance legal requirements while helping employees recognize, examine, and address the behaviors that lead to breaches in safety, privacy, and ethics. Modern Compliance subscribers will automatically receive the subscription update at the February '21 Release.
New Catalogs Available a la Carte	With the February '21 Release, new catalogs are now available a la carte.
Professional Skills Subscription Update	Build stronger communicators, strategic thinkers, and higher functioning teams across the organization with professional skills content focused on the business savvy skills that every employee needs. With this subscription teach employees how to communicate effectively (both internally and with customers), work well in teams, stay productive, and manage their own career development.

FEATURE NAME	DESCRIPTION
	Professional Skills subscribers will automatically receive the subscription update at the February '21 Release.
Public Sector Subscription Update	Designed for highly regulated organizations in the public sector that require 508 and WCAG compliant content, this curated library helps address talent shortages and provide your people with the critical skills needed to successfully serve your communities and the nation's health, safety, and wellness. Help your people become stronger communicators and teammates, work remotely, embrace agility and change, be inclusive and eliminate bias, and so much more. Public Sector subscribers will automatically receive the subscription refresh at the February '21 Release.

Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
ADP Workforce Now (WFN) Core Data Inbound Integration Enhancements	Yes	With this enhancement, the ADP Workforce Now (WFN) Core Data Inbound Integration is renamed in the Edge Marketplace from "ADP Workforce Now Core Data Sync" to "ADP Workforce Now Core Data Sync (ADP US Marketplace)." In addition, the integration is enhanced to provide additional validations and functionality to support common use cases and improve the overall customer experience.
Aquera Identity Directory Sync Bridge for Cornerstone OnDemand	Available in Edge Marketplace	The Aquera Identity Directory Sync Bridge for Cornerstone OnDemand imports and synchronizes the worker information in Cornerstone OnDemand with your identity access or governance platforms and directories. When used in conjunction with your Identity Platform (IDP), end-to-end IT automation of onboarding and offboarding of workers from downstream applications is now possible. This feature was released as part of the 4 December 2020 patch.
February '21 Language Pack Updates	Yes	New updates to Cornerstone Language Packs and additional languages, are available with the February '21 Release. Please visit the **February '21 Language Pack Updates** posting in the Success Center to review the full list

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		of additions, changes, and their targeted availability in stage and production environments.
Data Exporter - Add Zulu Offset to DateTime Fields in the CSV Export in April '21 Release		With the April 2021 release, Cornerstone is adding the Zulu offset to DateTime fields in the CSV export from the Data Exporter to ensure that there is parity between the CSV and JSON outputs.
Data Exporter - Deprecation of XML Manifest for Core and Non-Core Objects with the April '21 Release		The XML manifest will continue to be provided alongside the JSON manifest until the April '21 release, at which point the XML manifest will be deprecated and no longer provided for both core and non-core objects. We advise against using the XML manifest in new development work, and suggest you modify applications that currently use the XML manifest as soon as possible. The JSON manifest will continue to be delivered for both core and non-core objects and is the preferred choice.
Data Exporter - Reclassify Custom Fields of Type "DateTime" to "LocalDateTime" in April '21 Release		With the April 2021 release, Cornerstone is reclassifying custom fields of type "DateTime" to "LocalDateTime" within the Data Exporter. This reclassification will fix the incongruity by presenting the date-time without the Zulu offset.
Data Exporter API - Access Core Objects Over API	Yes, via the Reporting API	With this release, access to Data Exporter core objects is extended to organizations that use the Reporting API.
Deprecation of Custom		Cornerstone will be deprecating the legacy reporting solution "Custom Reports" in 2022. With Reporting 2.0, users can execute the same business reporting operations

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reports in 2022		as they've done in Custom Reports in addition to Reporting 2.0's rich suite of new features and functionality. When the deprecation occurs, existing Reports will be migrated to Reporting 2.0, and customers will no longer be able to access Custom Reports. For users that have already done the migration themselves and/or who no longer need the custom reports, there will be an option to opt-out of being migrated. The deprecation was first announced as part of the May '20 release.
Deprecation of Learning Loads for Data Load Wizard (DLW) with the October '21 Release		Ability to perform learning data loads using Data Load Wizard will be deprecated with and end-of-life in the October '21 Release. End-of-support will occur in 2021, and support for defects related to the DLW learning loads will stop at this time. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.
Edge Import - Ability to Deactivate Subjects Associated with Training (Subject Loads)	Yes	With this enhancement, the Edge Import Subjects Load functionality now allows for the deactivation of subjects that are associated with training. A subject can be deactivated even if it and its child subjects have training associated with it.
Edge Import - Additional Fields for Event and Session Loads	Yes	With this enhancement, additional fields are available for Event and Session Loads in Edge Import.
Edge Import - "Curriculum Parts" Load Renamed to "Curriculum Structure"	Yes	To align with language throughout the system, the Edge Import "Curriculum Parts" load is renamed to "Curriculum Structure."

Cornerstone February 2021 Release Notes: Release Notes for February 2021

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
End of Support for IE11 and Edge Legacy with the July '21 Release		Cornerstone is retiring support for Microsoft Internet Explorer 11 and Microsoft Edge Legacy. In order to keep up with browser security requirements and the latest software enhancements, Cornerstone will discontinue support for Microsoft Internet Explorer 11 and Microsoft Edge Legacy in the July '21 Release.
New Basque (Spain) Language Pack Available for Purchase	No, contact your Account Manager	Cornerstone is expanding our supported languages with the addition of the Basque (Spain) Language Pack.
New Catalan (Spain) Language Pack Available for Purchase	No, contact your Account Manager	Cornerstone is expanding our supported languages with the addition of the Catalan (Spain) Language Pack.
OrgPlanning Integration (Early Adopter)	Yes	The new OrgPlanning Integration provides information-rich org charts, visual corporate directories, and hierarchical analytics to the entire enterprise, transforming conventional organizational charts into valuable business tools to manage workforce change. This functionality is not available during UAT.
Reporting 2.0 - Delivery to Email Enhancement	Yes	With this enhancement, updates are made to the report delivery by email functionality in Reporting 2.0.
Reporting 2.0 - Report Automation Enhancements	Yes	With this enhancement, scheduling and user experience updates are made to Reporting 2.0 to enhance the report delivery, refresh, and snapshot features. These updates are designed to reduce the manual effort when managing reporting data.
Reporting 2.0 - Usability	Yes	Smaller enhancements to report headers, calculated fields, and dashboards are made for the February '21 release and

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Enhancements		are intended to improve the user experience for Reporting 2.0.

Reporting 2.0 - Additional Fields	Yes	Additions and updates are made to reporting fields with the February '21 release:
		
		○ **Cornerstone Recruiting Fields**
		○ **Cornerstone Careers Fields: Development Plans Fields**
		○ **Cornerstone Learning Fields**
		○ Core/General Fields:
		   ○ **Core Fields**
		   ○ **Skills Profile Fields**
		○ **Cornerstone Performance Fields: Succession Fields**

Reporting Fields - Core/General	Yes	New fields are added to the Core > User > Details section in Reporting 2.0.
Reporting Fields - Skills Profile	Yes, if the Capabilities functionality is enabled via Corporate Preferences	A new Capabilities section is now available in Reporting 2.0, which includes new and existing fields.
RTDW Updates to Reporting API, RDW, and Data Exporter	Yes	Impacting only organizations using Reporting API, Replicated Data Warehouse (RDW), and Data Exporter, the Real-Time Data Warehouse (RTDW) categories may be impacted, deprecated, or break applications, scripts, or functionalities that are based on earlier versions of RTDW objects.
Skills Profile and Capabilities Library (Early Adopter)	Yes, if the Capabilities functionality is enabled via Corporate Preferences	Cornerstone's AI-powered Skills Graph automatically detects and suggests skills that employees might have based on their profile data, making it easier for employees to declare what they're capable of, which skills they want to develop, and which they don't want to develop now. This enables more personalized content recommendations and more meaningful career development conversations. With the Capabilities Library and Skills Profile:

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		o Cornerstone's AI-powered Skills Graph automatically imports skills into the Capabilities Library. (Administrators can screen skills before they are published for employees to see.) o Cornerstone's AI-powered Skills Graph automatically associates relevant skills to each employee job title using data collected from over 250 million profiles worldwide, across all industries and organization sizes. o Employees can declare which skills they currently have, which skills they want to further develop, and which ones they do not currently want to develop. (Employees are given a jump start with automatically suggested skills they can declare and the ability to view full skill descriptions.) o Employees can also self-rate their proficiency, interest, and enjoyment for specific skills, and receive skill proficiency ratings from their peers. o Organizations can continue to use their internally defined skills in addition to the skills from Cornerstone's Skills Graph. o Organizations should experience a faster implementation time to get their capabilities library up and running.
STS Authentication End-Of-Life	Yes	Cornerstone's legacy authentication framework for APIs, Session Token Service (STS) is scheduled for end-of-life which will occur with the February '21 Release.
Updates to Conditions for Group Criteria	Yes	With this enhancement, when creating or editing a group, the *Group Criteria* section now includes the ability to select and define conditions tied to Employment Status, User Type, User Sub-Type, Rehired Employee, or Leave Type standard fields.
Workday Core Data Inbound Integration Enhancements	Yes	With this enhancement, the Workday Core Data Inbound Integration now includes additional validations and functionality to improve the overall customer experience.

Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
e-days Absence Management Integration Enhancements	Yes, for HR clients using this integration in Edge.	The following new functionality is added to the e-days Absence Management integration available in Edge: o Absence Home dashboard on Universal Profile only displays entitlement Pot data o Email subject line updated to include "ERROR" or "SUCCESS"
OU Based Regex	Yes	With this release, organizations can define and configure multiple Regex patterns based on OU values.

Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Adyen Payment Processor (Early Adopter)	No	Cornerstone's Extended Enterprise product was built on the Cybersource payment gateway, requiring organizations to solely use that service to accept payment for training sold via the Learning Management System (LMS). This has remained largely unchanged over time, with the exception of enabling PayPal as an additional payment processor. With this Early Adopter enhancement, the new Adyen Payment Gateway payment processor is available for credit card payments. As this is an Early Adopter project, organizations may opt-in at will.
Cornerstone Learn - Mobile Security Enhancements	Yes	This enhancement includes the following features, which help improve the security of the Cornerstone Learn app and protect against potential attacks: o Weak PIN detection, with a pop-up that prompts users to use a stronger PIN. Criteria that will flag a PIN as weak: o Less than three unique characters (e.g. PIN that uses only two numbers, such as 343344)

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		○ Using four numbers that are in subsequent order (e.g 1234XX or X1234X or XX4567) ○ Using four numbers in backwards subsequent order (e.g. XX4321 or 4321XX) ○ 30 minute device lockout after five unsuccessful PIN attempts ○ Encryption of information before storing to keychain (iOS only) This enhancement was made available with the Dec 4 2020 patch.
Cornerstone Learn - UX Enhancements for Android	Yes	With this user experience (UX) enhancement, the Learn app has been updated to include the following features: ○ A circular user profile icon will be implemented in the upper right-hand corner of the top app bar, replacing the Search icon. Settings, Log Out, Forget Me, and QR Code functionality will reside under this new user profile. ○ The **Transcript**, **Downloads**, and **Approvals** links will be migrated from the navigation drawer to tappable icons within a fixed bottom navigation bar. Additionally, this bottom navigation bar will contain a Home icon and a Search icon, allowing all the main Learn app features to be easily accessible from any app page with a single tap. ○ The navigation drawer will be renamed "Links," and repositioned to the right side of the top app bar. It will continue to house any configured custom links, as well as the **Give Feedback** link. This enhancement was made available with the Dec 4 2020 patch.
Cornerstone Learn - UX Enhancements for iOS	Yes	With this user experience (UX) enhancement, the Learn app has been updated to include the following features: ○ A user profile icon will be implemented in the upper right-hand corner of the top app bar, replacing the Search icon. Settings, Log Out, Forget Me, and QR Code functionality will reside under this new user profile.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		o The Search icon will be migrated to the second position of the bottom navigation bar. o Formerly a fixture of the bottom navigation bar, Settings will be migrated to the newly added user profile. It will exist as a link, and when the link is tapped, it will display all Learn app settings. This enhancement was made available with the Dec 4 2020 patch.
Curriculum Player Checkbox Selected by Default	Yes	With this enhancement, the **Curriculum Player** option available during the curriculum creation process is selected by default. This means the Curriculum Player experience will be enabled for all curricula created after the February 2021 release unless the administrator deselects the checkbox next to the **Curriculum Player** option. Enabling the Curriculum Player by default makes it easier for organizations to deliver a superior learning experience to users consuming curricula in the system.
Deprecation for Browse for Training in 2H 2021	Yes	Cornerstone offers two learning discovery experiences: Learner Home and Browse for Training. Browse for Training is Cornerstone's legacy learning discovery experience. Browse for Training was previously scheduled for deprecation in 2021. However, the Product team recognizes that there are still feature areas that need to be addressed prior to the deprecation of Browse for Training. Therefore, the deprecation of Browse for Training has been postponed. The new deprecation date is not yet determined, but will **not** occur in 2021. Once a new date is determined, organizations will have three release cycles before the deprecation to manage any change management needs.
Deprecation of Learning Loads for Data Load Wizard (DLW) with the October '21 Release		Ability to perform learning data loads using Data Load Wizard will be deprecated with and end-of-life in the October '21 Release. End-of-support will occur in 2021, and support for defects related to the DLW learning loads will stop at this time. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Deprecation of Legacy Learning Details Page	Yes	With the February 2021 release, all portals will be automatically upgraded to the new Learning Details page for all supported training types. Portals using a customized version of the legacy Learning Details page will be impacted by this enhancement, but the redesigned Learning Details page can be customized in the same way.
Deprecation of the Proxy Enrollment API	Yes	Cornerstone's legacy Proxy Enrollment API, available as part of Cornerstone API, is being replaced by the new Learning Assignment API. The Proxy Enrollment API end-of-life deprecation will 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.
		Cornerstone will no longer address defects reported with the Proxy Enrollment API, and no enhancements will be made to the API. 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.
eeds - Continuing Medical Education Integration	Enablement required	With this enhancement, a new eeds integration is available, allowing organizations to view and track CME credits imported from eeds within learners' transcripts in the Cornerstone Learning Management System (LMS). Using this integration, learners and learning administrators are able to search, find, and confirm CME credits on the learner's transcript.
		The eeds integration tile was made visible in Edge on December 21, 2020.
Grovo and Create Tool Content	Yes	Digital accessibility promotes usability for users with physical, visual, or auditory impairments. With the February

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Player 508/WCAG Compliance Enhancements		'21 Release, the Grovo content player is now compliant to a WCAG 2.1 AA standard for accessibility, with minor exceptions for usage of third-party libraries outside of Cornerstone's control. When possible, impaired users are offered alternatives and workarounds to provide the best viewing experience of course content. The following enhancements are not noticeable to most end users, but will help facilitate an improved experience for users with visual impairments: o Higher color contrast ratios have been added to navigation buttons o ARIA labels are included on interactive elements o All content may be viewed at high magnification levels This functionality is not available at the start of UAT.
IE7 and IE8 Compatibility Modes Deprecation with the February '21 Release and jQuery Upgrade for Course Launching	Yes	During the August '20 Release, Cornerstone upgraded jQuery from v1.7 to v3.4.1 to enhance security and resolve known vulnerabilities. As part of this enhancement, Compatibility Mode for IE7 and IE8 is being deprecated. o With the October 2020 release, jQuery was automatically upgraded to v3.4.1 in Stage and Pilot portals. Options for IE7 and IE8 were removed. o With the February 2021 release, jQuery will be automatically upgraded to v3.4.1 in Production portals. The functionality will be deprecated completely, meaning that courses with IE7 and IE8 Compatibility Mode will be migrated to a "None" value.
Launch vILT Session via Email	Yes	With this enhancement, a new LAUNCH.SESSION.LINK tag is available when configuring the ILT Session Register email. This new tag, when incorporated into the body of the ILT Session Register email, provides email recipients with a customized link which allows them to immediately launch the virtual session by clicking the link.
Learning Assessments (Open Beta)	Yes	With the upcoming February '21 release, the expansion of the Learning Assessments open beta continues with the addition of the following features:

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Enhancements		○ Assessment completion reporting capabilities ○ New security permission ○ New navigation bar and filters available during the user's assessment completion process Learning Assessment functionality is currently only available in Stage portals.
Learning Details Enhancements	Yes	With the February 2021 release, any portals not yet using the redesigned Learning Details page are auto-upgraded to the new Learning Details page for all supported training types, and administrators no longer have the ability to disable the Learning Details page manually. Note: An exception to this auto-upgrade is that Extended Enterprise users accessing the Learning Details page through anonymous browsing will still see the legacy Learning Details page instead of the new Learning Details page, despite the auto-upgrade. In addition, the following enhancements have been made to the redesigned Learning Details page: ○ Event prices now display on the Learning Details page ○ Session custom fields can be viewed from the Session flyout of the Learning Details page ○ Improved transcript messaging ○ Improvements for training with recurrence ○ Inventory can be purchased for other users via the Learning Details page ○ Post-work behavior correction ○ Ratings and reviews can be deleted
New Playlist Max Limit Preference	Yes	Prior to this enhancement, the maximum number of items that could be added to a playlist was 20. With this enhancement, a new preference is available, allowing administrators to configure a playlist item limit of any value from 20 to 50. This new option provides increased flexibility when configuring playlists in the system, and allows organizations to further customize playlist functionality to their own needs.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reporting Fields - Learning	Yes	With the February 2021 release, four new learning content fields have been made available in reporting.
ServiceNow Integration	Enablement required	A ServiceNow integration is now available through the Edge Marketplace, meaning that organizations that rely on Cornerstone to train their employees can now directly integrate their Cornerstone Learning solution with their ServiceNow® HR Service Delivery solution. This integration was originally made available with the Nov 13 2020 patch.
Training Exemption Safelist	Yes	With this enhancement, administrators can configure a training exemption approval safelist at the training level, which then grants only specified users the ability to mark that training item as exempt and approve exemption requests for that training. Training exemption approval safelist criteria can be configured for training items via a new tab in the Course Catalog.
vILT Connector (Early Adopter) Enhancements	Enablement required to use integration. Upgrades automatically applied	With the Feb '21 release, the following enhancements have been made to the vILT connector: ○ Support for launching a vILT session through email ○ Multi-account support ○ Support for third party extended options (This enhancement requires partner involvement)

Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Goals API - Lock Goals	Yes, for clients that purchased the Cornerstone Foundational APIs in Edge.	With this enhancement, when goals are updated, a new Lock Goals endpoint now respects all rules regarding locking and unlocking goals enforced in customer portals. This applies to the Goals API when used with Careers and Performance.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reporting Fields - Succession	Yes, for Reporting 2.0	o With this enhancement, two new fields are added to Reporting 2.0 to make it easier to determine if a user is still included in a Succession task, has been removed, and the method of removal. Note: This feature was released as part of the 18 December 2020 patch. o For the "[metric name] - Calibration Source" reporting field, a new value, Task-PrePopulated is added to represent metrics that are pre-populated into a task but not edited.
SMP PowerPoint Template Report Enhancement	Yes	This enhancement expands what is reportable in the Succession Power Template report by using tags that currently exist in the Succession Task.
Total Compensation with Employee Compensation and Compensation Types	No, clients must migrate their DLW feed to Edge Import before migrating to Employee Compensation.	With this enhancement, organizations can now use the Employee Compensation section to: o View the total amount of monetary value the organization provides each person. o Create and edit employee compensation records.

Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Ability to Mark Onboarding Tasks Cancelled or Complete	Yes	With this enhancement, **Mark Complete** and **Mark Canceled** options are added to the Status column on the UNIVERSAL PROFILE > ONBOARDING tab for individual tasks. This helps you to better manage onboarding tasks that are no longer needed or have been completed outside the workflow.
Assessment Connector Enhancement	Available in Edge Marketplace	With this enhancement, assessment scores now appear on Manage Candidates via the Assessment Connector. This enables the score to show for each assessment package. In

17

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		addition, an Assessment section is added to the resume carousel and applicant cohort page, showing both the overall score and any individual assessment scores in a package.
Broadbean Job Posting Integration - Candidate Profile Enhancement	Available in Edge Marketplace	With this enhancement, the qualifications in the Minimum Qualifications field for a job requisition can now be sent to Broadbean's **Candidate Profile** field. This feature was released as part of the 4 December 2020 patch.
Cancel Onboarding Workflows After Hire Date	Yes	With this enhancement, the **Cancel Onboarding** option on the Onboarding Dashboard page can now be used to cancel onboarding after the onboarding start date. This helps you to better manage new hires who did not or were not able start the job.
Candidate API (Early Adopter)	Yes	Cornerstone's new Candidate APIs provide the ability to get a requisition's full application workflow, including prescreening and compliance questions, disclaimers, notes, and attachments, and then create an application and candidate in your Cornerstone portal. Applications can be posted in a complete or incomplete status. If incomplete, recruiters can invite candidates to finish their application within Cornerstones. As part of this Early Adopter release, Cornerstone is introducing two new endpoints: o Get Application Workflow - This endpoint retrieves a requisition's full application workflow, including action items that were previously irretrievable via the legacy Job Application API like prescreening questions, compliance questions, disclaimers, and notes. o Post Candidate and application - This endpoint posts a candidate and application to your Cornerstone portal. This feature was annomade available as part of the 13 November 2020 patch. This feature was first announced with the October '20 release.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Career Site "View Resume" Link Reflects File Type	Yes	With this enhancement, the **View Resume** link will update dynamically based on the file type being opened. The name of the link will be as follows based on the file type: o **View Resume (PDF)** if the file type is .pdf. o **View Resume (DOC)** if the file type is anything other than .pdf. o **View Resume** if a file was not attached and instead the resume was parsed.
Deprecation of Manage Applicants in a Future Release/Redirect to Manage Candidates with the April '21 Release	Yes	With the April '21 release, when the Applicants count is selected from the Manage Requisitions page in Production and Pilot portals, users will be redirected to a filtered view of **Manage Candidates** instead of Manage Applicants. Support for defects related to Manage Applicants will also stop at this time. *The deprecation was first announced in the May '20 release.*
End of Support for Hiring Manager Shortlist with the April '21 Release	Yes	With the April '21 Release, Cornerstone will end support of Hiring Manager Shortlist and support of defects will stop at this time. A deprecation date has not yet been set. Customers that utilize the Hiring Manager Shortlist are encouraged to begin using Request Candidate Feedback to share candidates with hiring managers and collect feedback. Request Candidate Feedback supports the ability to collect an "advance" or "do not advance" vote from hiring managers, and also enables hiring managers to leave comments for the recruiter to read if configured to do so.
Enhanced Date Support for Offer Letters	Yes	With this enhancement, all dates on the offer letter will now appear in alphanumeric format. The date will also be in the localized format of the person who created the offer letter.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
GDPR Enhancements	Yes	As part of the February '21 release, the following enhancements are made to assist with Global Data Protection Regulation (GDPR) compliance: ○ Candidates in an active status in a Canceled requisition will become eligible for data deletion. ○ Former employees will not be able to anonymize their own profile.
Internal Career Site - Display Hiring Manager	Yes (Internal Career Site must be self-enabled in **Feature Activation Preferences**)	With this enhancement, the hiring manager can now be displayed in search results on the internal career site. The feature must be enabled by the administrator in **Internal Career Site Preferences**.
Internal Career Site - Display Referral Link	Yes (Internal Career Site must be self-enabled in **Feature Activation Preferences**)	With this enhancement, the referral link now displays on the Refer a Candidate flyout. Users can copy the link and use it to refer the candidate via mediums other than email, such as social media platforms.
Olivia, Your AI Recruiting Assistant - Integration by Paradox	Available in Edge Marketplace	The Olivia integration by Paradox is an FAQ and scheduling powerhouse, pipeline builder, and real-time, mobile-first communication tool. The widget can be placed on a career site for candidates to interact with through an ontology specific to your organization. The job search integration allows for Paradox to provide requisition information to candidates while searching for a job through a chat. Olivia can guide the candidate through an assisted conversation to search for a job that they are interested in. Through an integration with Cornerstone, Olivia can proactively look up jobs in Cornerstone through the job requisition API and display information on the job to the candidate.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		This feature was released as part of the 18 December 2020 patch, and the tile was made available in Edge Marketplace on 21 December 2020.
Phenom Talent Experience Integration (TXM)	Available in Edge Marketplace	The TXM integration gives mutual customers the benefit of two integrations: o Job-Sync - The Job-Sync integration facilitates the extraction of requisitions from Cornerstone to Phenom for the purposes of job searching and recruiting scenarios. Upon the creation and publishing of a requisition in Cornerstone, the job will be extracted and posted to the front end of the Phenom platform. Customers need to purchase Phenom's software for this integration to work. There are no sample workflows to document as this integration is automated. Any requisition published from Cornerstone will be published on the Phenom platform. o Hiring-Status - The Hiring-Status integration facilitates the extraction and submission of candidate and status details to ensure the correct updated status is reflected in both systems. This sync allows recruiters working in both Cornerstone and Phenom to update candidate statuses and ensure the correct updated status is reflected in both systems. Customers need to purchase Phenom's software for this integration to work. There are no sample workflows to document as this integration is automated. Any status change within either Phenom or Cornerstone will trigger a change in the other system. This feature was released as part of the 8 January 2021 patch.
Reporting - Recruiting Fields	Yes	With this enhancement, new Referral fields are added to Reporting 2.0 to help customers determine referral bonus eligibility and better understand how employees use the referral program.
Share Anonymized Candidates When	Yes	With this enhancement, the Request Feedback feature on Manage Candidates is updated to allow anonymized candidates to be shared with hiring managers and business stakeholders. This enables candidates to be reviewed solely on their skills, experience, and certifications in an effort to

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Requesting Feedback		reduce the possibility of bias based on a candidate's name, gender, or location.
"View Resume" Renamed to "View Profile" on Manage Candidates	Yes	With this enhancement, the **VIEW RESUME** button on Manage Candidates is renamed **VIEW PROFILE**. The purpose of this update is to change the button name to a term that is more universally used and that communicates the functionality of the button more fully.
Visiotalent Assessment Integration	Available in Edge Marketplace	The Visiotalent Assessment integration built by CleverConnect offers cloud-based on-demand and live video interview solutions to uncover a candidate's personality and soft skills while reducing your time-to-hire. This feature was released as part of the 18 December 2020 patch, and the tile was made available in Edge Marketplace on 21 December 2020.

New and Enhanced Permissions for February '21 Release

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

New Permissions

The following permissions are new for the February '21 release:

Core/General

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
Capability Library - Edit	Grants ability to view, create, and edit capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Library - Manage	Grants ability to view, create, edit, and delete capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Preferences - Manage	Grants ability to create and edit proficiency levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
Reporting - Core - Capabilities - Manage	Grants access to create and manage reports that contain Capabilities Library data in Reporting 2.0. This permission cannot be constrained.	Reporting

Reporting - Core - Capabilities - View	Grants access to view reports that contain Capabilities Library data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - User Capabilities - Manage	Grants access to create and manage reports that contain user capability data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - User Capabilities - View	Grants access to view reports that contain user capability data in Reporting 2.0. This permission cannot be constrained.	Reporting
User Rating Scales - Manage	Grants ability to manage rating scales for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Rating Templates - Manage	Grants ability to manage rating scale templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Cornerstone HR

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - Manage OU Based Regex	Grants access to manage OU-based Regex patterns for user custom fields. This permission cannot be restrained. This is an administrator permission.	Core Administration

Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assessments - Manage	Grants access to Learning Assessments (Beta) functionality, which allows administrators to create, edit, publish, and delete assessments in Stage portals only. This permission also allows administrators to delete users' assessment attempts. This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	Learning - Administration

Performance

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Type - Edit	Grants access to the Compensation Types page to create, edit, inactivate, and delete Compensation Types. This permission is only granted to administrators who have Employee Salary Management – Edit permission. This is an administrator permission.	Compensation - Administration
Compensation Type - View	Grants view-only access to the Compensation Types page. This permission is only granted to administrators who also have Employee Salary Management permission. This is an administrator permission.	Compensation - Administration

Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Onboarding: Manage Onboarding Tasks	Grants the ability to cancel an onboarding task or mark the task as complete. This permission also grants the ability to cancel onboarding workflows after the hire date.	

Master List of New Report Fields for February '21 Release

This page provides the master list of new report fields for the February '21 release.

Core/General

FIELD NAME	SECTION
Capability ID	Capabilities
Capability Type	Capabilities
Capability Name	Capabilities
Capability Description	Capabilities
Capability Status	Capabilities
Capability Created By - User Full Name	Capabilities
Capability Created By - User ID	Capabilities
Capability Modified By - User Full Name	Capabilities
Capability Modified By - User ID	Capabilities
Created Date	Capabilities
Modified Date	Capabilities
Source	Capabilities
External ID	Capabilities
User Capability Status	Capabilities
User ID	Capabilities

Learning

FIELD NAME	SECTION
Online Course Protocol	Training > Training Details
Subscription Description	Training > Training Details
Subscription ID	Training > Training Details
Subscription Name	Training > Training Details

Performance

FIELD NAME	SECTION
Development Plan Training Item Completion	Training > Development Plans

Recruiting

FIELD NAME	SECTION
Referrer Email	Applicant Details > Referral

FIELD NAME	SECTION
Referral Date	Applicant Details > Referral
Referrer Related to Candidate	Applicant Details > Referral

Release Notes Updates for February '21 Release

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

Changes made on 16 March 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
ADP Single Sign-On (SSO) for ADP Canada Marketplace	ADP Single Sign-On (SSO) for ADP Canada Marketplace	This enhancement has been removed from the February '21 release, but will be released with the March 19 patch.
ADP Single Sign-On (SSO) for ADP US Marketplace	ADP Single Sign-On (SSO) for ADP US Marketplace	This enhancement has been removed from the release. This may be released in a post-release patch.
ADP Workforce Now (WFN) Core Data Inbound Integration for ADP Canada Marketplace	ADP Workforce Now (WFN) Core Data Inbound Integration for ADP Canada Marketplace	This enhancement has been removed from the February '21 release, but will be released with the March 19 patch.
Deprecation of Learning Loads for Data Load Wizard (DLW) with the February '22 Release	Deprecation of Learning Loads for Data Load Wizard (DLW) with the February '22 Release	This deprecation is now scheduled for February 2022. This was previously scheduled for October 2021.
Reporting Fields - Skills Profile	Reporting Fields - Skills Profile	Updated the permission names and added additional permissions. Added additional reporting fields.
Skills Profile and Capabilities Library (Early Adopter)	Skills Profile and Capabilities Library (Early Adopter) Capability Rating Scales - Manage	Added a new User Ratings permission and updated the description of the User Rating Scales - Manage and User Rating Templates - Manage permissions to note their dependency on the User Ratings permission.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Capability Rating Scales - Edit	
	Capability Rating Templates - Manage	
	Capability Rating Templates - Edit	
	Capability Rating Templates - Edit - General Settings	
	Capability Rating Templates - Edit - Feature Connectors	
	Skills Profile	
	Skills Profile - Get Started Wizard	
	Skills Profile - View Skill Details	
	Skills Profile - Rate Skill Level	
	Skills Profile - Rate My Interest	
	Skills Profile - My Rating Requests	
	Skills Profile - Provide Skill Ratings	
Skills Profile and Capabilities Library (Early Adopter)	Capability Rating Scales - Edit	The character limit for Score Display is increased from 50 to 100. The character limit for Description is increased from 100 to 500.

Changes made on 19 February 2021

Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Total Compensation with Employee Compensation and Compensation Types	Total Compensation with Employee Compensation and Compensation Types	The path to access the Employee Compensation page is not changing at this time. This statement is removed from the topic: ○ ADMIN > COMPENSATION MANAGEMENT > EMPLOYEE SALARIES changes to ADMIN > COMPENSATION MANAGEMENT >EMPLOYEE COMPENSATION.

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Bulk Publish Content (Online Course Loads)	Edge Import - Bulk Publish Content (Online Course Loads)	This enhancement has been removed from the February release. It will be delivered in a future release.
Reporting 2.0 - Usability Enhancements	Reporting 2.0 - Usability Enhancements	Removed the note that indicated report headers were not available for reports downloaded as a .csv file. As part of the February '19 Release, report headers are available to display in CSV, TSV, and PSV file formats when downloaded.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Deprecation for Browse for Training in 2H 2021	Deprecation for Browse for Training in 2H 2021	The deprecation of Browse for Training has been postponed. The new deprecation date is not yet determined, but will **not** occur in 2021. Once a new date is determined, organizations will have three release cycles before the deprecation to manage any change management needs.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Learning Details Enhancements	Learning Details - Session Custom Fields	Updated the following sentence to include Custom Fields Administration page: The visibility of custom fields for all training types is controlled from the Learning Details Preferences page and the Custom Fields Administration page.
Learning Details Enhancements	Learning Details - Training with Recurrence	Added the following note: **Note:** *This behavior does not apply to trainings versioned with Append Versioning, only with Replace Versioning.*
Reporting Fields - Learning	Reporting Fields - Learning	Added the following information: In addition, an **Include inactive trainings** checkbox has been added to the filters that are available in the Training Title flyout in the Filters section of the Report Builder. When selected, inactive training items are included in the search results, and can be included in the report filter.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Enhanced Date Support for Offer Letters	Enhanced Date Support for Offer Letters	The following correction to the enhancement was made: o The date on the offer letter will be in the localized format of the person who created the offer letter. The release notes incorrectly stated that the date will still be in the localized format of the person who is viewing the offer letter.

Changes made on 9 February 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
ADP Single Sign-On (SSO) for ADP US Marketplace	ADP Single Sign-On (SSO) for ADP US Marketplace	Updated the delivery date to a post-release patch.
Edge Import - Bulk Publish Content (Online Course Loads)	Edge Import - Bulk Publish Content (Online Course Loads)	Updated the following consideration about versioning online courses: If the courses require versioning, the versioning process should be completed using portal functionality (Course Publisher or Content Uploader). The content file size supported by Edge Import is 2GB, which is more than the size supported by Course Publisher (250MB) and Content Uploader (750MB). When versioning or replacing a course of 2GB size created by Edge Import, the only option is to deactivate the old version and create new course using Edge Import. This is an update to the versioning consideration communicated on Feb 5, 2021.
Org Planning Integration (Early Adopter)	Org Planning Integration (Early Adopter)	Removed "Upcoming Roadmap Features – Manage new features that may be part of new releases" from the Key Features section.
Reporting Fields - Core/General	Reporting Fields - Core/General	Corrected the spelling of the User Profile Timezone field name.
Reporting 2.0 - Usability Enhancements	Reporting 2.0 - Usability Enhancements	Added a note to indicate that reports downloaded as a .csv file will not show the filter criteria.

Changes made on 5 February 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
February '21 Language Pack Updates	February '21 Language Pack Updates	Added Dutch as an updated language pack.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Additional Fields for Event and Session Loads	Edge Import - Additional Fields for Event and Session Loads	Corrected the field name from "Add Training Contact" to "Training Contact."
Edge Import - Bulk Publish Content (Online Course Loads)	Edge Import - Bulk Publish Content (Online Course Loads)	Added a consideration for organizations that are using Course Publisher.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
eeds Continuing Medical Education Integration	eeds Continuing Medical Education Integration	Updated Implementation section to reflect new enablement process.
Launch vILT Session via Email	Launch vILT Session via Email	This enhancement was initially included only within the vILT Connector Enhancements project, but it has been separated into its own enhancement because the new LAUNCH.SESSION.LINK tag is available for all vILT sessions. This enhancements is not exclusive to the vILT Connector.
Training Exemption Safelist	Training Exemption Safelist	Added a consideration to state that using safelists is optional.

Changes made on 29 January 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Ability to Deactivate Subjects Associated with Training (Subject Loads)	Edge Import - Ability to Deactivate Subjects Associated with Training (Subject Loads)	Added additional information regarding where inactive subjects may be visible to administrators.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Skills Profile	Reporting Fields - Skills Profile	Added a Capability Status field.
Reporting 2.0 - Delivery to Email Enhancement	Reporting 2.0 - Delivery to Email Enhancement	Effective 2 February 2021, the row limit for report delivery by email will go back to a maximum of 200,000 for CSV, TSV, and PSV file export formats and will no longer be increasing to 1,000,000.
Reporting 2.0 - Report Automation Enhancements	Reporting 2.0 - Automation Settings Panel	Added a note that effective 2 February 2021, queued reports that are generated through scheduling will go back to containing up to 200,000 rows. This is a change from the enhancement for the February '21 release that would allow queued reports generated through scheduling to contain up to 1,000,000 rows.
Reporting 2.0 - Usability Enhancements	Reporting 2.0 - Usability Enhancements	o Added context around how to display filter criteria on the report header. The **Display Filter Criteria** option in the Report Properties panel must be toggled to On. o Effective 2 February 2021, Reporting 2.0 dashboard widgets will go back to displaying chart data for up to 200,000 rows in a report and will no longer display up to 1,00,000 rows. o Effective 2 February 2021, data exported through a Reporting 2.0 widget will go back to displaying up to 200,000 records instead of up to 1,000,000.
Updates to Conditions for Group Criteria	Updates to Conditions for Group Criteria Create/Edit Group - New Group Criteria Attribute Types	Removed the note regarding the Employment Status title, as this change has been implemented.

5 March Patch Release Functionality

Whats New for the 5 March 2021 Patch Release

The following is released along with the 5 March 2021 patch release:

MODULE	FEATURE	DESCRIPTION
Recruiting	Outmatch Video Interview Integration	The Outmatch Video Interview integration transforms your recruiting process with a video interview platform designed to boost efficiency in the hiring process and create engaging candidate experiences.

Recruiting

Outmatch Video Interview Integration

The Outmatch Video Interview integration transforms your recruiting process with a video interview platform designed to boost efficiency in the hiring process and create engaging candidate experiences.

Outmatch lets recruiters create engaging recruitment experiences, while still managing, inviting, and reviewing candidates through the Cornerstone platform. Candidates complete the video interview via the Outmatch platform, where they can also experience your brand through engaging media and video content.

Video Interview Workflow

Recruiter Creates Interview > Recruiter Assigns Interview > Candidate Completes Interview > Recruiter Views Interview, Scores, and Status

Create Interview

Video interviews are created in the Outmatch platform. The recruiter will add a list of questions to the interview and save it in Outmatch.

Assign Interview

Video interviews are assigned on Manage Candidates or Manage Applicants, using the **ASSIGN INTEGRATION** or **ASSIGN ASSESSMENT TASK** options respectively. Assigning the interview sends an email to the candidate, which will include a link to launch the interview.

For general information about assigning assessments to candidates:

o *See Manage Candidates - Assign Integrations.*
o *See Manage Applicants - Assign Assessment Task.*

Launch and Complete Interview

Candidates launch the video interview by clicking a link to the interview from the email sent by the recruiter. The video interview process consists of a series of questions, each of which appear on a new page within the interview. To answer a question, the candidate clicks a button to begin recording their answer. The candidate will be given a time limit for each question, and the recording will stop automatically at the end of the time limit.

Once all answers are recorded, the candidate can submit the interview.

View Interview, Scores, and Status

The interview is available to view from Manage Candidates or Manage Applicants by clicking the **VIEW INTERVIEW** button. Clicking the button opens the Outmatch platform to the interview page, which includes options to view the interview, rate the candidate, and provide comments.

Any scores the candidate received for the interview are sent to Manage Candidates and Manage Applicants. The status of the interview is also available.

Implementation

The Outmatch Video Interview integration will be available on 8 March 2021 via **Edge Marketplace** for all organizations using Recruiting and that also have an account with the integration vendor.

Additional instructions for enabling and configuring the integration are available on the **Setup tab of the integration in Edge**. There is no additional cost associated with enabling this integration in Edge.

Permissions

The following existing permissions apply to this functionality:

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

| | *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. | |

19 March Patch Release Functionality

Whats New for the 19 March 2021 Patch Release

The following is released along with the 19 March 2021 patch release:

MODULE	FEATURE	DESCRIPTION
Core/General	ADP Single Sign-On (SSO) for ADP Canada Marketplace	This self-service integration is built especially for the ADP Canada Marketplace, and it provides the ability to access Cornerstone from within ADP, without having to enter Cornerstone credentials. This integration is available for self-activation via the Edge Marketplace for ADP Canada Marketplace organizations. The tile is available in Edge Marketplace as of March 23.
Core/General	ADP Workforce Now (WFN) Core Data Inbound Integration for ADP Canada Marketplace	With this new API-based integration, organizations using the ADP Canada Marketplace can easily configure and enable the integration on Edge. This integration is available for self-activation via the Edge Marketplace for ADP Canada Marketplace organizations. The tile is available in Edge Marketplace as of March 23.
Core/General	Skills Profile and Capabilities Library (Early Adopter)	Previously available as an Open Beta in Stage and Pilot environments, the Skills Profile and Capabilities Library (Early Adopter) is now available for self-activation in Production environments with additional functionality for both administrators and end users.
Core/General	Reporting Fields - Skills Profile	A new Capabilities section is now available in Reporting 2.0, which includes new and existing fields.
Core/General	Viewing Reporting API Documentation	With this patch, customers who view API documentation through their portal will have the same visibility as customers who do so through the public API explorer. This has two implications for customers: 1. Customers can access views that apply to products that they have not yet purchased. 2. Customers are no longer able to see customized, portal-specific field-level values in the API documentation. Instead, the /services/api/x/odata/api/views/$metadata endpoint should be used by developers to pull portal-specific information.

MODULE	FEATURE	DESCRIPTION
Recruiting	Broadbean Integration - Job Description Mapping Enhancement	With this enhancement, customers can now determine whether they would prefer to send the **Job Description** field or the job ad in Cornerstone to map to the **Detailed Job Description** field in Broadbean. To enable this feature, toggle on the existing **Candidate Profile** field on the **Broadbean Job Posting integration Settings page** in Edge.

Core/General

ADP Single Sign-On (SSO) for ADP Canada Marketplace

This self-service integration is built especially for the ADP Canada Marketplace, and it provides the ability to access Cornerstone from within ADP, without having to enter Cornerstone credentials.

Considerations

o   This SSO integration is available to organizations whose portals reside on the LAX data center.
o   Organizations subscribing to the ADP WFN Core Data Inbound Integration will automatically be subscribed to SSO in the ADP Marketplace. It is not available to be purchased independently.
o   Deep link and mobile are not supported.

Implementation

This integration is only available for LAX Swimlanes.

This integration is available for self-activation via the Edge Marketplace for ADP Canada Marketplace organizations using Workforce Now. The tile is available in Edge Marketplace as of March 23.

Enablement involves two parts:

1.   Purchase on ADP Marketplace.
2.   Purchase on Edge Marketplace.

Documentation and instructions will be available with the release of this integration.

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

ADP Workforce Now (WFN) Core Data Inbound Integration for ADP Canada Marketplace

Prior to this enhancement, the ADP WFN Core Data Inbound Integration was only available to organizations that are using ADP's US Marketplace.

With this new API-based integration, organizations using the ADP Canada Marketplace can easily configure and enable the integration on Edge.

The integration between Cornerstone and ADP WFN for Canada Marketplace provides a seamless process of creating and updating users and organizational units (OU) in Cornerstone. This is achieved through an automated data sync which simplifies data management and eliminates redundant work. ADP WFN remains the system of record for user and OU data.

Considerations

o   This integration is available to organizations whose portals reside on the LAX data center.

Implementation

This integration is only available for LAX Swimlanes.

This integration is available for self-activation via the Edge Marketplace for ADP Canada Marketplace organizations. The tile is available in Edge Marketplace as of March 23.

Enablement involves two parts:

1.   Purchase on ADP Marketplace.
2.   Purchase on Edge Marketplace.

Documentation and instructions will be available with the release of this integration.

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	Edge

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

Reporting Fields - Skills Profile

A new Capabilities section is now available in Reporting 2.0, which includes new and existing fields.

The following new fields are available in the Capabilities section in Reporting 2.0:

- o Capability ID
- o Capability Type
- o Capability Name
- o Capability Description
- o Capability Status
- o Capability Created By
    - o User Full Name
    - o User ID
- o Capability Modified By
    - o User Full Name
    - o User ID
- o Created Date
- o Modified Date
- o Source
- o External ID
- o User Capability Status
- o User ID

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE
Capability ID	Capabilities	This field displays the unique identifier associated with the capability.	Text
Capability Type	Capabilities	This field displays the capability type (e.g., skill, competency, value). Currently, only skills are available.	Text
Capability Name	Capabilities	This field displays the primary name that was specified for the capability.	Text
Capability Description	Capabilities	This field displays the description of the capability. This is used to provide additional context about the capability.	Text
Capability Status	Capabilities	This field displays the active status of the capability (e.g., Draft, Active, Inactive).	Text
Capability Created By - User ID	Capabilities	This field displays the user ID of the user who created the capability.	Number

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE
Capability Created By - User Full Name	Capabilities	This field displays the full name of the user who created the capability.	Text
Capability Modified By - User ID	Capabilities	This field displays the user ID of the user who most recently modified the capability.	Number
Capability Modified By - User Full Name	Capabilities	This field displays the full name of the user who most recently modified the capability.	Text
Created Date	Capabilities	This field displays the date and time at which the capability was initially created.	Date
Modified Date	Capabilities	This field displays the date and time at which the capability was most recently modified.	Date
Source	Capabilities	This field displays the original source of the capability (e.g., Cornerstone Skills Graph, Edge Import, Legacy Universal Profile Skills). to indicate where the capability was originally created.	Text
External ID	Capabilities	This field indicates the unique identifier of the capability as designated by an external source.	Text
User Capability Status	Capabilities	This field indicates the capability status with regards to the user (e.g., Declared, Suggested, Developing, Not Developing).	Text
User ID	Capabilities	This field displays the unique identifier of the user, which can be joined with standard reporting fields (e.g., position, division, location, full name).	Number

How Does this Enhancement Benefit My Organization?

Use new fields in Reporting 2.0 to answer the following skills related questions:

o   What are the suggested, declared, and developing skills of the users in this division?
o   Who are the users that have these declared skills?
o   What are the skills (every state) of this one person?

Implementation

This functionality is automatically enabled for all organizations that have enabled the Skills Profile and Capabilities Library functionality and Reporting 2.0.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Core - Capabilities - Manage	Grants access to create and manage reports that contain Capabilities Library data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - Capabilities - View	Grants access to view reports that contain Capabilities Library data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - User Capabilities - Manage	Grants access to create and manage reports that contain user capability data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - User Capabilities - View	Grants access to view reports that contain user capability data in Reporting 2.0. This permission cannot be constrained.	Reporting

Security Roles

Upon release, the new *Reporting - Core - Capabilities - Manage*, *Reporting - Core - Capabilities - View*, *Reporting - Core - User Capabilities - Manage*, and *Reporting - Core - User Capabilities - View* permissions are automatically granted to the default System Administrator role if Skills Profile and Capabilities are enabled. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Skills Profile and Capabilities Library (Early Adopter)

Prior to skills profiles, many organizations faced challenges in setting up, maintaining, and scaling organizational skills, investing hundreds of hours defining the relevant skills for each job in their organization while employees had to manually add skills to their Universal Profile. Getting employees to fill out their Universal Profile with skills was often a struggle. Gathering feedback on skills was laborious and administrator-driven. There was a need for an accurate way to identify the talent landscape.

Cornerstone's AI-powered Skills Graph automatically detects and suggests skills that employees might have based on their profile data, making it easier for employees to declare what they're capable of, which skills they want to develop, and which they don't want to develop now. This enables more personalized content recommendations and more meaningful career development conversations.

With the Capabilities Library and Skills Profile:

o Cornerstone's AI-powered Skills Graph automatically imports skills into the Capabilities Library. (Administrators can screen skills before they are published for employees to see.)
o Cornerstone's AI-powered Skills Graph automatically associates relevant skills to each employee job title using data collected from over 250 million profiles worldwide, across all industries and organization sizes.
o Employees can declare which skills they currently have, which skills they want to further develop, and which ones they do not currently want to develop. (Employees are given a jump start with automatically suggested skills they can declare and the ability to view full skill descriptions.)
o Employees can also self-rate their proficiency, interest, and enjoyment for specific skills, and receive skill proficiency ratings from their peers.
o Organizations can continue to use their internally defined skills in addition to the skills from Cornerstone's Skills Graph.
o Organizations should experience a faster implementation time to get their capabilities library up and running.

This functionality is intended for organizations that are interested in gathering more data on their employees' capabilities and organizations that want to encourage employee-driven development, where employees can build robust profiles, request ratings from peers, and rate peers.

Capabilities Library

It is challenging for administrators to maintain a complete list of relevant skills for their organization. Using Cornerstone's Skills Graph, it becomes much easier for an organization to maintain the right list of skills. The Capabilities Library connects company-specific skills and competencies and the Cornerstone Skills Graph for a new administrator experience.

Skills Profile

Know your employees' capabilities at a deeper level with the Skills Profile. With the Skills Profile, it's easy for employees to quickly request manager, peer, or 360 skill ratings using

the out-of-the-box templates that come with the Skills Profile. Visibility can be controlled to ensure that only those intended can view rating results (private, public, or limited to certain relationships).

How Does this Enhancement Benefit My Organization?

With the Capabilities Library and Skills Profile, employees can manage their skills with intelligent skill suggestions using Cornerstone's new AI-powered Skills Graph and request skill proficiency ratings from their peers.

Included with the Open Beta (Available in Stage and Pilot with the October '20 Release)

- o Manage a library of capabilities
- o Create, edit, delete, and deactivate capabilities
- o Localize capability names and descriptions
- o Set portal preferences for proficiency levels and rating scales
- o Automatically import suggested skills into the Capabilities Library
- o Skills Profile View/Access Skills Profile from Universal Profile (UP)
- o User onboarding wizard to guide employees
- o Manually search and declare skills on profile
- o Peer ratings on proficiency
- o Request peer ratings
- o Automatically import suggested skills into the Capabilities Library
- o Self-rating on Proficiency, Interest, and Enjoyment
- o Confidence Ladder visualization of an employee's skill proficiency
- o Rating history to view previous skill ratings

Included with the Early Adopter (Available with the February 2021 Release)

- o Employees can view the full results from their rating requests.
- o Administrators can manage the status (draft, active, inactive) of each skill, affecting which skills can be seen by employees.
- o Administrators can configure rating templates and determine which kinds of ratings are available to employees.
- o Administrators can version rating scales.
- o Administrators have the option (during enablement) to run a one-time scan of all employee profiles using the Skills Graph, automatically generating suggested skills for all active users in the portal and pre-populating the library with skills relevant to the organization.
- o All features previously announced as part of Open Beta in October 2020.

Included with the Early Adopter (Available with the 19 March 2021 Patch)

- o Administrators can report on employee skills, including suggested, declared, and developing skills for each person.
- o Administrators can localize rating scales and template labels.

o Employees can open rating request shareable links using an SSO URL.

Considerations

AI-powered Skills Graph suggestions are supported for English, French, Spanish, German, and Portuguese languages. Administrators can manually localize skills into additional languages. Employees in non-supported languages can manually add skills to their profile.

Implementation

Skills Profile and Capabilities Library (Open Beta) features introduced in the October '20 Release are available today in stage and pilot.

Skills Profile and Capabilities Library (Early Adopter) features are available in stage and pilot by default at the start of UAT except for reporting, localizing rating scales and template labels, and SSO links for rating requests.

Skills Profile and Capabilities Library (Early Adopter) features will be available in production for all customers to self-enable in a post-release patch. Administrators in the System Administrator role will have access to the Skills Profile, Capabilities Preferences, and Capabilities Library by default.

Glossary

o Capability - Capabilities describe what a person can do or what they know. This may include skills, competencies, knowledge, and other types of data.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
Capability Library - Edit	Grants ability to view, create, and edit capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration

Capability Library - Manage	Grants ability to view, create, edit, and delete capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Preferences - Manage	Grants ability to create and edit proficiency levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Rating Scales - Manage	Grants ability to manage rating scales for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Rating Templates - Manage	Grants ability to manage rating scale templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Security Roles

Upon release, the new *Capabilities - Skills Profile - View*, *Capability Library - Edit*, *Capability Library - Manage*, *Capability Preferences - Manage*, *User Rating Scales - Manage*, and *User Rating Templates - Manage* permissions are automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Viewing Reporting API Documentation

Prior to this update, customers who attempted to view their Reporting API documentation through their portal would have a custom view loaded for the Reporting API. In some cases, the documentation would be empty or outdated, requiring the public API documentation to have to be discovered outside of the portal.

With this patch, customers who view API documentation through their portal will have the same visibility as customers who do so through the public API explorer. This has two implications for customers:

1. Customers can access views that apply to products that they have not yet purchased.
2. Customers are no longer able to see customized, portal-specific field-level values in the API documentation. Instead, the /services/api/x/odata/api/views/$metadata endpoint should be used by developers to pull portal-specific information.

Implementation

This functionality is automatically enabled for organizations that have access to Edge.

Recruiting

Broadbean Integration - Job Description Mapping Enhancement

Prior to this enhancement, customers who use the Broadbean Job Posting integration have always mapped the content in the job ad in Cornerstone to the **Detailed Job Description** field in Broadbean, since this was the initial mapping workflow. However, the fields in Broadbean are much more specific than the job ad, and customers want to be able to split relevant data into the appropriate fields.

The content in the job ad in Cornerstone tends to duplicate information in the **Minimum Qualifications** field, which is mapped to the **Candidate Profile** field in Broadbean. For example, if a customer has the **Candidate Profile** option enabled in Edge for the Broadbean Job Posting integration, and they also include the JOB.MINIMUM.QUALIFICATIONS tag in the job ad, the minimum qualifications information will appear twice when applicants view the job via a Broadbean job board because it appears in both the **Detailed Job Description** and the **Candidate Profile** field.

With this enhancement, customers can now determine whether they would prefer to send the **Job Description** field or the job ad in Cornerstone to map to the **Detailed Job Description** field in Broadbean.

To enable this feature, toggle on the existing **Candidate Profile** field on the **Broadbean Job Posting integration Settings page** in Edge.

Implementation

The **Candidate Profile** field is available for the Broadbean Job Posting integration in **Edge Marketplace** for all organizations using the Recruiting suite and that also have an account with Broadbean. Additional instructions for the Broadbean Job Posting integration are available on the **Setup tab of the integration in Edge**.

Note: Please confirm with Broadbean that your account is eligible to use this field.

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	Edge

	Cornerstone system. This permission cannot be constrained. This is an administrator permission.	

Careers

Check-Ins: Attach Documents to a Template

With this release, administrators and HR organizations can provide supplemental information to their organizations by uploading and attaching documents to a Check-Ins template. HR organizations and portal administrators now have a scalable, repeatable, and dynamic means of communicating with their workforce while using Check-Ins.

Documents attached to Check-Ins templates are accessible to end-users when they create discussions.

How Does This Enhancement Benefit My Organization?

This enhancement provides clients the ability to communicate in their own unique voices and to meet their own unique and changing needs.

 Potential uses for attached documents include:

o Documentation and resources for new hires.
o Guidance for newly promoted managers who are managing teams for the first time.
o Detailed instructions for facilitating effective meetings.
o Suggested talking points for specific topics such as new HR policies or mergers and acquisitions.

Considerations

o Supported extensions: .pdf, .doc, .docx, .pptx, and .ppt
o Administrators can attach a maximum of 5 files to one template.
o The maximum file size is 100mb.
o Deleting or updating an attachment affects all Check-Ins that use that template, including Check-ins created in the past.
o End users cannot modify attached documents.

Implementation

This feature is automatically enabled for clients who purchased the Performance or Career suites and are currently using Check-Ins.

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

Home Page Enhancement for Follow-Ups

Prior to this enhancement, when users click on a due-soon or overdue follow-up number on the Check-Ins home page, the side panel opens to display all follow-ups with no easy way to distinguish which items are due soon or overdue.

With this enhancement, when you click a red overdue or yellow due-soon number on the Check-Ins homepage, the side panel highlights these items in matching red or yellow for quick identification.

How Does This Enhancement Benefit My Organization?

These color-coded indicators let meeting participant easily identify and prioritize their due-soon and overdue items to stay on top of their pending tasks.

Implementation

This feature is automatically enabled for clients using Check-Ins.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. Users who have constraints in the "Check-Ins - Create" permission cannot create a new Check-In with anyone who doesn't belong to the constraints. However, they will still be able to view and update any Check-In that they are a participant of. This is an end user permission.	Performance

Goal API – Lock Goals

Prior to this enhancement, when updating goals via the API, if a manager locked a goal, these locks were ignored.

With this enhancement, when goals are updated, a new Lock Goals endpoint now respects all rules regarding locking and unlocking goals enforced in customer portals.

This enhancement applies to the Goals API when used with Careers and Performance.

Implementation

This functionality is on by default for clients that have purchased the Cornerstone Foundational APIs in Edge.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Reporting Field – Development Plan Training Item Completed

Development Plans only consider a training item 'Not Completed' or 'Completed' in calculating overall progress on the plan. Currently, training that is started and partially completed may show a not started status. The existing field "Dev Plan Training Item Status" gives you statuses from the Transcript for the user.

This new field gives allows you to report on the precise status of Development Plan progress:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Development Plan Training Item Completion	Indicates that a specific training item in a Development Plan is "Completed" or "Not Completed".	Text

Considerations

o   This field applies to all plans, including those that currently exist.
o   This field applies to completion of a specific Training Item in a Development Plan only.

Implementation

This functionality is automatically enabled for all organizations using Performance and Reporting 2.0.

Content Anytime

Leadership and Management Subscription Update

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

Leadership & Management subscribers will automatically receive the subscription update at the February '21 Release with the following additions:

- **New topics**:
  - TEDx: TED content from native speakers on important topics such as:
    - Corporate Responsibility
    - Innovation
  - Number of new TEDx titles:
    - German: 2
    - French: 1
- **New Grovo Content**:
  - Identifying High Potential Employees
    - This program gives leaders the tools to find their best talent while mitigating the effects of bias on the process
- **New Provider**:
  - Madecraft
    - High production-value content primarily found through LinkedIn
    - Madecraft offers expert-led video training on several skills including leadership, communication, and building your personal brand
    - Courses available in English

Modern Compliance Subscription Update

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

Modern Compliance subscribers will automatically receive the subscription update at the February '21 Release with the following additions:

- **TEDx**: TED content from native speakers on important topics such as:
  - Corporate Sustainability and Responsibility
  - Number of new TEDx titles:
    - French: 5
    - Spanish: 4
- **New Originals Content**:
  - DEI Part 2
    - The newest installment of DNA: DEI features 8 scenarios that Digital Natives will encounter around diversity, equity, and inclusion

Content Anytime - New Catalogs Available a la Carte

With the February '21 Release, new catalogs are now available a la carte. The new available catalogs include:

- **TED Ideas into Action Collections**:
    - 10 new collections highlighting TED's new Ideas into Action format across topics like productivity, change, remote work, communications, leadership, and collaboration
- **Pink University Full Catalog**:
    - Over 100 courses in German and English on business skills, leadership, employee learning, time management, communication, and sales
- **MyBreev Compliance Catalog**:
    - 45 courses in German covering compliance-related topics
- **Kokoroe Business Skills**:
    - 78 courses in French and English covering topics like digital fluency, remote work, and stress management
- **Bookboon Deep Integration Collections**:
    - Multilanguage collections of online books allowing learners to remain in CSOD platform
- **B-Talent Digital Gapp Spanish Collection**:
    - Digital fluency for Spanish learners
- **Whil Starter Kit**:
    - 12 course collection intro

Professional Skills Subscription Update

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

Professional Skills subscribers will automatically receive the subscription update at the February '21 Release with the following additions:

- **TEDx**:
  - TED content from native speakers on important topics such as:
    - Innovation
    - Critical Thinking
  - Number of new TEDx titles:
    - German: 1
    - French: 12
    - Spanish: 37
- **New CSOD Originals Content**:
  - The H Files: Season 2
    - The second installment of The H Files will examine triumphs and mistakes of the past to learn how to lead through uncertainty
- **New Grovo Originals Content**:
  - Managing Emotions
    - Teaching tactics to recognize how emotions impact work, this program helps employees address them in healthy and productive ways
- **New Provider**:
  - Madecraft
    - High production-value content primarily found through LinkedIn
    - Madecraft offers expert-led video training on several skills including leadership, communication, and building your personal brand
    - Courses available in English

Public Sector Subscription Update

Designed for highly regulated organizations in the public sector that require 508 and WCAG compliant content, this curated library helps address talent shortages and provide your people with the critical skills needed to successfully serve your communities and the nation's health, safety, and wellness. Help your people become stronger communicators and teammates, work remotely, embrace agility and change, be inclusive and eliminate bias, and so much more.

Public Sector subscribers will automatically receive the subscription refresh at the February '21 Release with the following additions:

- **DEI Playlists**
    - Playlists will be loaded with the public sector subscription featuring content on unconscious bias and best practices for an inclusive workforce

Core/General

ADP Workforce Now (WFN) Core Data Inbound Integration Enhancements

With this enhancement, the ADP Workforce Now (WFN) Core Data Inbound Integration is renamed in the Edge Marketplace from "ADP Workforce Now Core Data Sync" to "ADP Workforce Now Core Data Sync (ADP US Marketplace)." In addition, the integration is enhanced to provide additional validations and functionality to support common use cases and improve the overall customer experience.

The following enhancements are now included in this integration:

- o Automatically attempt to sync unprocessed user records
    - o If the User sync fails, the system automatically attempts to sync unprocessed user records in the next successful sync. This does not include user records that failed to sync due to a validation error, such as missing a required field.
    - o A new Retried User row is added to the sync summary table in the email notifications to indicate the number of retried users who were added, updated, or failed.
    - o Three new columns are added to the email log:
        - o Record Sync Type - If the user record is a retried user, then this displays "Retried User." Otherwise, it is empty.
        - o Original Sync Date - If the user record is a retried user, then this displays the date and time of when the user sync failed. Otherwise, it is empty.
        - o Original Request ID - If the user record is a retried user, then this displays the original request ID for when the user sync failed. Otherwise, it is empty.
- o Masked Subscription Token value
    - o The Subscription Token value is now masked after the settings are saved.
- o Support for user custom fields
    - o Organizations can now sync ADP employee and personal custom fields into the Cornerstone system as short text box user custom fields.
    - o The integration only supports syncing ADP personal and employment custom fields.
    - o ***Note:*** *Changes to a user's personal custom field data in ADP are not synced in Cornerstone via daily sync. Organizations must run a full sync to sync these changes.*
- o Ability to exclude users from sync
    - o Organizations can now configure a filter to specify which user records should be created or updated in the Cornerstone system using a user custom field or OU.
- o Allow the user and organizational unit (OU) to sync independently of each other
    - o Organizations can now choose to sync Users Only, OUs Only, or OUs & Users.
- o Improved email notification and email log
    - o Email notifications now include the date and time at which the sync attempted to process.
    - o If the sync fails, the email notifications indicate that the sync failed. If the sync failed due to the ADP API being unavailable or Cornerstone-related issues, this is included.

- o Email notifications now include information on how to report an issue.
- o The email subject now includes the environment in which the sync attempted to process.
- o For OU syncs, the OU sync summary now includes all mapped OUs.
- o The email subject for Subscription Token emails now include the environment from which the subscription token is generated (i.e., stage, pilot, production).
- o When a user fails to load due to a missing mandatory field, the log now shows the name of the missing field.
- o The log now indicates when a user's manager is not loaded into the system.
- o Validate setting credentials during configuration
  - o The system now validates the Subscription Token, Client ID, and Client Secret are valid. If they are invalid, an error message is displayed.
- o Sync user's ADP OU changes in Cornerstone
  - o If a user's OU data changes in ADP, then these changes are reflected in Cornerstone after the data is synced. This applies to standard OU types if the OU is mapped on the Settings page.
  - o **Note:** *Changes to a user's Pay Grade data in ADP are not synced in Cornerstone via daily sync. Organizations must run a full sync to sync these changes.*
- o Support for custom OUs
  - o Organizations can now sync ADP Validation Table data (OUs) as custom OUs in the Cornerstone system.
  - o Standard and custom OUs can be mapped to the following ADP Validation Table data: Business Unit, Cost Number, Department, Eligibility Class, Job Titles, Locations, Pay Grades, Union Code, and Union Local.
  - o **Note:** *Changes to a user's Eligibility Class, Pay Grade, Union Code, and Union Local data in ADP are not synced in Cornerstone via daily sync. Organizations must run a full sync to sync these changes.*
- o Decouple Position, Location, and Grade OUs from the integration
  - o Organizations can now define the mapping and syncing of OUs. A new Standard Organizational Unit Mapping section is available on the Settings page, which allows organizations to specify standard OU mapping preferences.
  - o Standard OUs can be mapped to the following ADP Validation Table data: Business Unit, Cost Number, Department, Eligibility Class, Job Titles, Locations, Pay Grades, Union Code, and Union Local.
  - o Division and Cost Center drop-down fields are removed from the Settings page.
  - o **Note:** *Changes to a user's Eligibility Class, Pay Grade, Union Code, and Union Local data in ADP are not synced in Cornerstone via daily sync. Organizations must run a full sync to sync these changes.*
- o Sync future hire record updates in Cornerstone
- o The "Force Full Sync" and "Force Delta Sync" toggle switches on the Settings page are updated to "Full Sync Now" and "Delta Sync Now," respectively.

Implementation

These enhancements are automatically enabled for organizations using the ADP Workforce Now Core Data Sync integration in Edge.

This integration is available for self-activation via the Edge Marketplace.

Documentation and instructions will be updated in the ADP Workforce Now Core Data Sync guide with the release of these enhancements.

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

Aquera Identity Directory Sync Bridge for Cornerstone OnDemand

The Aquera Identity Directory Sync Bridge for Cornerstone OnDemand imports and synchronizes the worker information in Cornerstone OnDemand with your identity access or governance platforms and directories. When used in conjunction with your Identity Platform (IDP), end-to-end IT automation of onboarding and offboarding of workers from downstream applications is now possible.

Implementation

This integration is available for self-activation in Edge Marketplace as of December 4.

February '21 Language Pack Updates

New updates to Cornerstone Language Packs and additional languages, are available with the February '21 Release. Please visit the **February '21 Language Pack Updates** posting in the Success Center to review the full list of additions, changes, and their targeted availability in stage and production environments.

Two new languages are added to the list of available languages at CSOD. Please contact your Account Manager if you are interested in these languages:

o Basque (Spain)
o Catalan (Spain)

Languages with updates for the February '21 Release include:

o Dutch
o Finnish
o French (France)
o German
o Japanese
o Lithuanian
o Norwegian
o Russian
o Slovenian
o Spanish (Latin America)
o Ukrainian

Implementation

This functionality is automatically enabled for all organizations.

Data Exporter - Add Zulu Offset to DateTime Fields in the CSV Export in April '21 Release

Currently, there is an incongruity between how DateTime fields are presented in the CSV and JSON outputs from the Data Exporter. In the JSON output the DateTime fields include the Zulu offset, while in the CSV output they do not.

With the April 2021 release, Cornerstone is adding the Zulu offset to DateTime fields in the CSV export from the Data Exporter to ensure that there is parity between the CSV and JSON outputs.

DATETIME FIELDS BEFORE CHANGE	DATETIME FIELDS AFTER CHANGE
JSON = "2008-09-22T14:01:54.9571247**Z**" CSV ="2008-09-22T14:01:54.9571247"	JSON = "2008-09-22T14:01:54.9571247**Z**" CSV ="2008-09-22T14:01:54.9571247**Z**"

Implementation

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

Data Exporter - Deprecation of XML Manifest for Core and Non-Core Objects with the April '21 Release

When a data export is delivered, it contains a manifest which explains the contents of the export.

Currently the manifest for core and non-core objects is delivered in both JSON and XML.

The XML manifest will continue to be provided alongside the JSON manifest until the April '21 release, at which point the XML manifest will be deprecated and no longer provided for both core and non-core objects. We advise against using the XML manifest in new development work, and suggest you modify applications that currently use the XML manifest as soon as possible. The JSON manifest will continue to be delivered for both core and non-core objects and is the preferred choice.

JSON can be parsed by a standard JavaScript function which makes it easier to work with for programmatic consumption compared to XML which has to be parsed with an XML parser. The JSON manifest is also richer in extended metadata including:

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

Implementation

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

Data Exporter - Reclassify Custom Fields of Type "DateTime" to "LocalDateTime" in April '21 Release

Currently, date-time type custom fields are classified as DateTime in the Data Exporter Manifest when they should be classified as a LocalDateTime. DateTime fields have a Zulu offset intended for Coordinated Universal Time (UTC), but the date-time of custom fields is supposed to be for locally observed date/times.

With the April 2021 release, Cornerstone is reclassifying custom fields of type "DateTime" to "LocalDateTime" within the Data Exporter. This reclassification will fix the incongruity by presenting the date-time without the Zulu offset.

Organizations must review and update their integrations to make sure that during parsing of the export, the validation step will not fail when it encounters the new date-time type.

MANIFEST BEFORE CHANGE	MANIFEST AFTER CHANGE
Custom_Field_0001 "type": "datetime"	Custom_Field_0001 "type": "Localdatetime"

OUTPUT FOR CUSTOM FIELD_001 BEFORE CHANGE	OUTPUT FOR CUSTOM FIELD_001 AFTER CHANGE
"2008-09-22T14:01:54.9571247Z"	"2008-09-22T14:01:54.9571247"

Implementation

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

Data Exporter API - Access Core Objects Over API

Prior to this enhancement, access to Data Exporter core objects was limited to organizations that used the Data Exporter.

With this release, access to Data Exporter core objects is extended to organizations that use the Reporting API.

The following benefits are included with access to Data Exporter core objects:

- Max page size increased to 10,000
- Replaces 80 legacy views
- Extended metadata to simplify integrations
    - Descriptions
    - Custom Field Names
    - Relationships between fields and objects (via the Odata Navigation properties)
- All core objects include Last_touched_dt

How Does this Enhancement Benefit My Organization?

Data Exporter core objects are optimized for reliability at scale and improved performance compared to the API views. Organizations attempting to retrieve large numbers of records(>100K) may notice improved performance upon switching to the core objects.

New End Point

[Portalname].csod.com/services/api/x/dataexporter/api/objects/

Implementation

This functionality is available via a new end point for organizations that use the Reporting API. Objects are not 1:1 representations of views, therefore they will require some integration work in order to begin use.

Reporting API documentation will be updated when this functionality becomes available.

Deprecation of Custom Reports in 2022

Note: *The deprecation was first announced as part of the May '20 release.*

Cornerstone will deprecate the legacy reporting solution "Custom Reports" in 2022. With Reporting 2.0, users can execute the same business reporting operations as they've done in Custom Reports in addition to Reporting 2.0's rich suite of new features and functionality. For users that have already done the migration themselves and/or who no longer need the custom reports, there will be an option to opt-out of being migrated.

Customers who wish to migrate their custom reports to Reporting 2.0 ahead of the 2022 deprecation can do so by using the **custom reports migration tool** available in Reporting 2.0.

Standard reports will eventually be deprecated but the timeline has not yet been determined.

Permissions

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

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

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

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

Deprecation of Learning Loads for Data Load Wizard (DLW) with the February '22 Release

Ability to perform learning data loads using Data Load Wizard will be deprecated with and end-of-life in the February '22 Release. End-of-support will occur in 2022, and support for defects related to the DLW learning loads will stop at this time. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

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

Existing organizations that are ready to migrate to Edge Import can enable it in the Edge Marketplace and review the migration and starter guides to help them through the migration steps. All organizations are required to complete their migrations before the February '22 Release which will be the end-of-life date for DLW learning data loads.

Edge Import - Ability to Deactivate Subjects Associated with Training (Subject Loads)

Prior to this enhancement, subjects could only be made inactive if they were not associated with any training. This was only possible via a work order.

With this enhancement, the Edge Import Subjects Load functionality now allows for the deactivation of subjects that are associated with training. A subject can be deactivated even if it and its child subjects have training associated with it.

Inactive subjects associated with training may be visible to administrators in several areas of the Catalog when managing training. These areas include: Course Catalog, Material Administration, Test Administration, Curricula Administration, Video Administration, and Manage Events & Sessions. Inactive subjects associated with training are also visible in the Subjects filter in Learning Search.

How Does this Enhancement Benefit My Organization?

This enhancement provides a self-service solution to deactivate subjects linked to training without the need for a work order.

Implementation

This functionality is automatically enabled for all organizations using the Subjects data load in Edge Import. Template Guides are available in Edge Import to assist with load setup.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Edge Import - Additional Fields for Event and Session Loads

With this enhancement, additional fields are available for Event and Session Loads in Edge Import.

The following optional fields are added to Edge Import:

FIELD NAME	DESCRIPTION	TYPE	IMPACTED LOADS
Request Form	Provide the name of an existing request form within the portal. This must be an exact match of a valid request form in the portal. This is the form that users can complete at the time they request the session from the portal. This field is optional.	Text	ILT Sessions
Training Contact	Provide the User ID of the contact person for the training. The User ID must already exist in the system. This field is optional. If no value is set for the session, then the event's training contact is used for the session. For event loads, if no value is provided, the event training contact is set to the user who is performing the load.	Text	ILT Sessions
Required Training Approvals	Provide the number of training approvals that are required for users who request the session. This field is optional. If no value is provided, this field defaults to the number of required training approvals on the User Record.	Numeric	ILT Sessions
Required Completion Approvals	Provide the number of completion approvals that are required for users who complete the session. Upon completion, the user's status will proceed to Pending Completion Approval before moving to Completed. This field is optional. If no value is provided, the session does not require completion approvals.	Numeric	ILT Sessions
Training Units	Specify the relationship between the training unit price and the monetary price. The acceptable values are Allow Conversion Rate by Monetary Value, Disassociate Pricing, or Do Not Allow Payment. This field is optional. If the existing event has training unit pricing set to historical or future, no updates to this field are supported.	Text	ILT Events, ILT Sessions
Default Training Unit Price	Provide the default price in training units.

This is required if Training Units is set to Disassociate Pricing. The value provided is ignored if Training Units is set to Allow | Numeric | ILT Events, ILT Sessions |

FIELD NAME	DESCRIPTION	TYPE	IMPACTED LOADS
	Conversion Rate by Monetary Value or Do Not Allow Payment. When this is set, the Training Unit Pricing is set to Active Pricing. Edge Import does not support historical or future pricing for training units. When updating a session that has training unit pricing set to historical or future, Edge Import does not update the type of pricing.		
Restrict Withdraw from Session	When this option is enabled, users who are registered for the session are unable to withdraw from the session. This option is disabled by default, allowing users to withdraw. For events, this setting applies to all new sessions within the event by default. For sessions, this setting is applied to all sessions in the load. For ILT transcript loads, if the user transcript status that is provided in the data load is "Withdraw" and the session has this option enabled, then an error message is displayed when the load is processed.	Boolean	ILT Events, ILT Sessions, ILT Transcript
No-show Penalty - Monetary	Provide the additional monetary penalty for not attending the session and not withdrawing from the session. This is optional.	Numeric	ILT Events, ILT Sessions
No-show Penalty - Training Units	Provide the additional training unit penalty for not attending the session and not withdrawing from the session. This is optional.	Numeric	ILT Events, ILT Sessions
Registration Deadline	Provide the registration deadline in hours. For example, a value of 24 will result in a registration deadline that is 24 hours (one day) before or after the session, depending on what is set in the Registration Deadline - Before/After field. This field is required if the Registration Deadline - Before/After field is provided.	Numeric	ILT Events, ILT Sessions
Registration Deadline - Before/After	This determines whether the Registration Deadline is before or after the session start. This must be set to either Before or After. This is	Text	ILT Events, ILT Sessions

FIELD NAME	DESCRIPTION	TYPE	IMPACTED LOADS
	required if the Registration Deadline field is provided.		
Refund Type	This is the type of refund for the refund amount. This must be either Training Unit or Monetary. When importing refund settings, Refund Type, Refund Amount, Refund Percentage, and Number of Days Prior to Start Date must all be provided.	Text	ILT Events, ILT Sessions

The following fields are enhanced to allow updating:

FIELD NAME	DESCRIPTION	IMPACTED LOADS
Currency Code	This value indicates the currency associated with the following price related fields: Price per Session, Penalty for Withdrawal Amount, Refund Amount, and No Show Penalty - Money.	ILT Events, ILT Sessions

How Does this Enhancement Benefit My Organization?

Event and Session load fields available in Data Load Wizard and previously missing from Edge Import have been added to Edge Import.

Considerations

Saved configurations are not impacted by this enhancement.

Implementation

This functionality is automatically enabled for all organizations using the ILT Event and ILT Sessions data loads in Edge Import. Template Guides are available in Edge Import to assist with load setup. New training unit fields are available in portals where training units are enabled.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 - Sessions Load	Grants access to the Sessions data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - "Curriculum Parts" Load Renamed to "Curriculum Structure"

To align with language throughout the system, the Edge Import "Curriculum Parts" load is renamed to "Curriculum Structure." When an administrator selects a new load within Edge Import, they will now see "Curriculum Structure" as an option to select from the Category and Type field. The "Access LMS - Curriculum" permission's description is also updated to reflect this change. It will now read as: "Grants ability to access load reports and perform Curriculum load and Curriculum Structure load via the Edge Import."

Implementation

This functionality is automatically enabled for all organizations using the Curriculum data load in Edge Import. Template Guides are available in Edge Import to assist with load setup.

Permissions

The following existing permission is updated and applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Curriculum Load	Grants ability to access load reports and perform Curriculum load and Curriculum Parts/Curriculum Structure loads via Edge Import. This permission cannot be constrained. This is an administrator permission. ***Note:*** *With the February '21 Release, the Curriculum Parts load is renamed to Curriculum Structure.*	Edge Import

End of Support for IE11 and Edge Legacy with the July '21 Release

Cornerstone is retiring support for Microsoft Internet Explorer 11 and Microsoft Edge Legacy.

In order to keep up with browser security requirements and the latest software enhancements, Cornerstone will discontinue support for Microsoft Internet Explorer 11 and Microsoft Edge Legacy in the July '21 Release.

Please reach out to your IT department and make plans to convert to one of the compatible browsers prior to the release.

New Basque (Spain) Language Pack Available for Purchase

Cornerstone is expanding our supported languages with the addition of the Basque (Spain) Language Pack.

Implementation

Please contact your Account Manager for additional information.

New Catalan (Spain) Language Pack Available for Purchase

Cornerstone is expanding our supported languages with the addition of the Catalan (Spain) Language Pack.

Implementation

Please contact your Account Manager for additional information.

Org Planning Integration (Early Adopter)

This functionality is not available during UAT.

Prior to this release, Cornerstone organizational charting capabilities were very limited and did not support a "what if" scenario modeling analysis.

With this release, by integrating with Org Planning, a product added to the Cornerstone portfolio as part of the Saba acquisition, organizations can now easily visualize, plan, and model organizational data.

o   Organizations must activate the Org Planning Integration via the Edge Integrate Marketplace. *See Marketplace - Browse Edge Integrations.*

o   To request the new Org Planning Integration, go to ADMIN > TOOLS > EDGE > MARKETPLACE and select the Org Planning tile.

Key features

o   Conditional formatting – Configure chart views using conditional formatting capability. These views can be based on the direct feed from Cornerstone and calculated fields defined in Org Planning.

o   HR Metrics – Create unique chart styles using formula fields.

o   Dynamic Chart Filtering - Highlight specific parts of the chart or exclude those that are less relevant.

o   Plan and modeling feature – Create snapshots and simulate org changes along with impact analysis. Analysis can be done using any information available in your views

o   Drag and drop restructuring - Drag and drop entire branches, easily add new managers or subordinates.

o   Planning against business goals – Delegate plans to individuals or teams and include dedicated business goals.

o   Track changes log – Track plan changes with a granular track changes log.

- o Smart Search/Smart Lists/Comparing – Narrow information down to view only what is necessary for the specific task.
- o Archiving – Keep track of how an organization evolved over time. Also for compliance use cases.
- o Upcoming Roadmap Features – Manage new features that may be part of new releases.
- o Printing – Publish org charts to Adobe (.pdf), PowerPoint (.ppt), or Excel (xls).

Cornerstone also provides a daily data refresh of employee data and photographs into Org Planning.

Self-service extensions via flexible field mapping UI

Org Planning provides self-service flexibility to customize the scope of fields that fit into organizational planning as follows:

- o Reporting 2.0 – A dedicated report to include/exclude selected fields as part of the data exchange.
- o Org Planning Domain Fields – Enables these fields and defines processing.

Getting Started

To get organizations up-and-running right away, the following is provided:

- o A set of best practice views and profile cards:
  - o An employee directory
  - o Spans and layers
  - o Workforce counts
- o A pre-defined security model for admin, managers, and individual contributor roles.

Integration Guide
Click here to view Org Planning Integration – Single Sign On via SAML 2.0 – February 2021

How Does this Enhancement Benefit My Organization?
- o Org Planning delivers value to your entire workforce with secure, up-to-date org charts for every manager and employee, showing just the data appropriate to their position and role.
- o Org Planning brings together information for a holistic view of your workforce.
- o Org Planning provides a powerful visualization solution to give executives, managers, and human resources the power to thoroughly understand the organization, along with metrics and key performance indicators as a basis for critical organizational decision making.

Implementation

- o This integration is enabled upon request. For additional information and assistance, click the "Get Started" button inside the Org Planning Integration tile in Edge Marketplace and complete the form. A Cornerstone representative will contact you.
- o Org Planning is only available in the Production environment.
- o Single Sign On is available in the Org Planning (Early Adopter) phase. Org Planning can be integrated as a Service Provider application within a SAML 2.0 Framework. This functionality works best for customers who can extend their existing Identity Provider implementation.
- o Org Planning works with the following browsers:
  - o Windows OS: Chrome, Edge Chromium, Firefox
  - o Mac OS: Safari (excluding administration features)

Reporting Fields - Core/General

New fields are added to the User > Details section in Reporting 2.0.

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE
Modified Date	User > Details	This field displays the date and time at which the most recent effective change was applied to a specific user record.	Date/Time
User Profile Timezone	User > Details	This field displays the time zone that is selected in My Account > Preferences > Settings. If the user has not selected a specific time zone, this field value is null. This field does not provide the fallback portal or organizational unit (OU) default values.	Text
Activation Start Date	User > Details	This field displays the start date for a user's status. It is part of the activation period data set. ***Note:*** *Activation Start Date should not be used independently. It should always be considered in combination with Activation End Date, User Status, and status change audit data.* This field is not intended for use by organizations that use effective dating.	Date
Activation End Date	User > Details	This field displays the end date for a user's status. It is part of the activation period data set. ***Note:*** *Activation End Date should not be used independently. It should always be considered in combination with Activation Start Date, User Status, and status change audit data.* This field is not intended for use by organizations that use effective dating.	Date

Implementation

This functionality is automatically enabled for all organizations using Reporting 2.0.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Core - User - Details - View	Grants access to view the Core User Details section in Reporting 2.0. This permission cannot be constrained.	Reporting

Reporting Fields - Skills Profile

A new Capabilities section is now available in Reporting 2.0, which includes new and existing fields.

The following new fields are available in the Capabilities section in Reporting 2.0:

- o Capability ID
- o Capability Type
- o Capability Name
- o Capability Description
- o Capability Status
- o Capability Created By
    - o User Full Name
    - o User ID
- o Capability Modified By
    - o User Full Name
    - o User ID
- o Created Date
- o Modified Date
- o Source
- o External ID
- o User Capability Status
- o User ID

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE
Capability ID	Capabilities	This field displays the unique identifier associated with the capability.	Text
Capability Type	Capabilities	This field displays the capability type (e.g., skill, competency, value). Currently, only skills are available.	Text
Capability Name	Capabilities	This field displays the primary name that was specified for the capability.	Text
Capability Description	Capabilities	This field displays the description of the capability. This is used to provide additional context about the capability.	Text
Capability Status	Capabilities	This field displays the active status of the capability (e.g., Draft, Active, Inactive).	Text
Capability Created By - User ID	Capabilities	This field displays the user ID of the user who created the capability.	Number

FIELD NAME	REPORT SECTION	FIELD DESCRIPTION	FIELD TYPE
Capability Created By - User Full Name	Capabilities	This field displays the full name of the user who created the capability.	Text
Capability Modified By - User ID	Capabilities	This field displays the user ID of the user who most recently modified the capability.	Number
Capability Modified By - User Full Name	Capabilities	This field displays the full name of the user who most recently modified the capability.	Text
Created Date	Capabilities	This field displays the date and time at which the capability was initially created.	Date
Modified Date	Capabilities	This field displays the date and time at which the capability was most recently modified.	Date
Source	Capabilities	This field displays the original source of the capability (e.g., Cornerstone Skills Graph, Edge Import, Legacy Universal Profile Skills). to indicate where the capability was originally created.	Text
External ID	Capabilities	This field indicates the unique identifier of the capability as designated by an external source.	Text
User Capability Status	Capabilities	This field indicates the capability status with regards to the user (e.g., Declared, Suggested, Developing, Not Developing).	Text
User ID	Capabilities	This field displays the unique identifier of the user, which can be joined with standard reporting fields (e.g., position, division, location, full name).	Number

How Does this Enhancement Benefit My Organization?

Use new fields in Reporting 2.0 to answer the following skills related questions:

o   What are the suggested, declared, and developing skills of the users in this division?
o   Who are the users that have these declared skills?
o   What are the skills (every state) of this one person?

Implementation

This functionality is automatically enabled for all organizations that have enabled the Skills Profile and Capabilities Library functionality and Reporting 2.0.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Core - Capabilities - Manage	Grants access to create and manage reports that contain Capabilities Library data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - Capabilities - View	Grants access to view reports that contain Capabilities Library data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - User Capabilities - Manage	Grants access to create and manage reports that contain user capability data in Reporting 2.0. This permission cannot be constrained.	Reporting
Reporting - Core - User Capabilities - View	Grants access to view reports that contain user capability data in Reporting 2.0. This permission cannot be constrained.	Reporting

Security Roles

Upon release, the new *Reporting - Core - Capabilities - Manage*, *Reporting - Core - Capabilities - View*, *Reporting - Core - User Capabilities - Manage*, and *Reporting - Core - User Capabilities - View* permissions are automatically granted to the default System Administrator role if Skills Profile and Capabilities are enabled. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Reporting 2.0 - Delivery to Email Enhancement

Reports Exceeding 25MB Delivered by Email

With this enhancement, when a report that is set up for email delivery exceeds 25 MB, a link to download the report is sent to the recipient. The report is available to download via the link for 21 days.

Row Limits

Effective 2 February 2021, the row limit for report delivery by email will go back to a maximum of 200,000 for CSV, TSV, and PSV file export formats and will no longer be increasing to 1,000,000.

This is a change from the enhancement that was published in release notes on 27 January 2021 for the February '21 release, which indicated that the row limit for report delivery by email was increasing from 200,000 to 1,000,000 for CSV, TSV, and PSV file export formats.

Considerations

o SSO via the email link is not supported in the February '21 Release but it is being considered as a future enhancement. Logged in users will see a new window pop-up upon clicking the link and the report download will begin. If the email recipient is not logged in prior to clicking the link, they will be prompted to log in before the report download begins.
o As with existing functionality for reports delivered by email, reports under 25 MB will continue to be sent as an email attachment.

Implementation

Upon implementation of this enhancement, this functionality is available in all portals using Reporting 2.0.

Permissions

For information about Reporting 2.0 permissions, see the following:

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

Reporting 2.0 - Report Automation Enhancements

Reporting 2.0 - Report Automation Enhancements - Overview

With this enhancement, scheduling and user experience updates are made to Reporting 2.0 to enhance the report delivery, refresh, and snapshot features. These updates are designed to reduce the manual effort when managing reporting data.

o The Delivery panel is renamed Automation Settings. This panel is still available by clicking the calendar icon on the Builder tab.
o A **Queue this report on a schedule** option is added to the delivery options on the Automation Settings panel.
o An **Include in Automation** option is added for each user on the Select Users flyout when selecting the users to share the report.
o Users can now select the file type when queuing a report for download on the Reporting 2.0 homepage.
o Each report that appears in the queued report pop-up on the Reporting 2.0 homepage will have an icon next to it to indicate whether the report was generated manually or is a queued report.

Implementation

Upon implementation of this enhancement, this functionality is available in all portals using Reporting 2.0.

Permissions

For information about Reporting 2.0 permissions, see the following:

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

Reporting 2.0 - Automation Settings Panel

With this enhancement, the Delivery panel is renamed Automation Settings and is updated to include additional features and user experience changes. These updates are designed to reduce the manual effort when managing reporting data.

The ability to send and share via email and deliver to FTP is still available, and a new **Queue this report on a schedule** has been added.

To access Reporting 2.0, go to REPORTS > REPORTING 2.0.
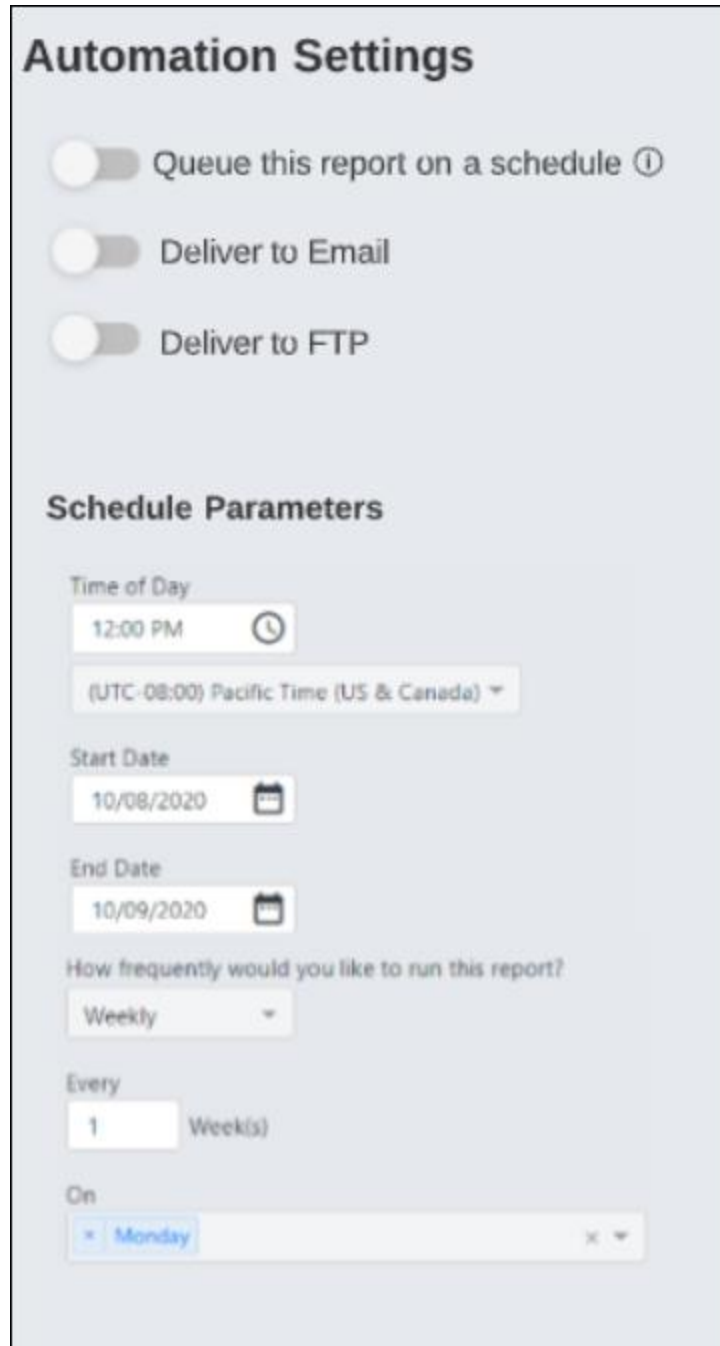
Permissions

In addition to **general permissions for creating and viewing reports in Reporting 2.0**, users also need the following permission to deliver reports:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Email Delivery	Grants ability to deliver reports via email in Reporting 2.0. This permission can be constrained by OU, User's OU, User, User Self and Subordinates, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Subordinates, and Employee Relationship. This permission is used in conjunction with the view permission for Reporting 2.0 and can also be used in conjunction with the various product, section, and field level permissions. Users must have permission to view Reporting 2.0 in order to have access to a report that is delivered to them. If they do not have view access, then the Reporting 2.0 navigation sublink will not display for them. Users who have permission to manage Reporting 2.0 can edit a report that is delivered to them. They can also copy the delivered report. ***Note about Constraints:** The constraints for this permission determine who you can deliver the report to. The constraints do not pertain to the data you can see in the report.*	Reporting
Reporting - FTP Delivery	Grants ability to schedule delivery of Reporting 2.0 reports to an FTP directory. This permission cannot be constrained.	Reporting

	This permission is used in conjunction with the view permission for Reporting 2.0 and can also be used in conjunction with the various product, section, and field level permissions. Users must have permission to view Reporting 2.0 in order to have access to a report that is delivered to them. If they do not have view access, then the Reporting 2.0 navigation sublink will not display for them. Users who have permission to manage Reporting 2.0 can edit a report that is delivered to them. They can also copy the delivered report.	

Queue this report on a schedule

This is a new option in Reporting 2.0. When this option is toggled on, users can queue reports on a schedule on behalf of shared users. Shared users are then able to download the queued report.

To set the report schedule, use the options in the Schedule Parameters section to set the time, date, and frequency on which you want the report to run.

Once the report is scheduled, a snapshot of the report can be found in the Report Queue interface on the Reporting 2.0 homepage at the scheduled time.

If the report has been published to dashboards, the widgets that are using this report will also be refreshed automatically. ***Note:*** *The snapshot is available by clicking the queue report or download icon for a report on the Reporting 2.0 homepage.*

Note: *Effective 2 February 2021, queued reports that are generated through scheduling will go back to containing up to 200,000 rows. This is a change from the enhancement for the February '21 release that would allow queued reports generated through scheduling to contain up to 1,000,000 rows.*

Note: *Reports that are queued manually will continue to have a limit of 1,000,000 rows.*

Deliver to Email

As with existing functionality for Reporting 2.0, reports can be shared and delivered via email. With this enhancement, the email delivery feature is now available by toggling on the **Deliver to Email** option in Automation Settings.

To set the delivery schedule, use the options in the Schedule Parameters section to set the time, date, and frequency of the report schedule.

Use the Email Recipients section at the bottom of the Automation Settings panel to select to email the report to yourself and/or shared users.

When sharing a report, the following new automation option is available in the Select Users flyout:

o **Include in Automation** - When this option is checked, automation for report queuing will run on behalf of up to 20 shared users, which means the shared users will automatically receive a refreshed report whenever the report is scheduled to run. This option is not available for organizational units (OU) or for users who are subordinates of the shared user. This option only functions if the **Queue this report on a schedule** option is toggled on in the Automation Settings panel.

Deliver to FTP

As with existing functionality for Reporting 2.0, reports can be delivered to an FTP server. With this enhancement, the FTP delivery feature is now available by toggling on the **Deliver to FTP** option in Automation Settings.

When the **Deliver to FTP** option is on, a Report Output Format section appears at the bottom of the Automation Settings panel. As with existing functionality, select the output format in the drop-down and choose whether to check the **Send as a Zip file** option. There are no functionality changes to FTP delivery.

Queue Report for Download File Type

With this enhancement, users can now select one of the following file types when **queuing a scheduled report for download on the Reporting 2.0 homepage**:

o Open as HTML - This option is available for reports with a row count that is less than or equal to 30,000.Excel, CSV, Txt(Pipe), Txt(Tab) - These file types are available for reports with a row count that is less than or equal to 200,000.CSV, Txt(Pipe), Txt(Tab) - These file types are available for reports with a row count that is greater than 200,000.

Note: The ability to queue reports for download is only available for users with permission to download reports.

In addition, each report that appears in the queued report pop-up will have one of the following icons next to it:

o - This icon indicates the report was generated manually.

o - This icon indicates the report was generated on a schedule.

Including the icons helps users distinguish between reports used on a scheduled basis and reports used on more of an ad hoc basis.

Reporting 2.0 - Usability Enhancements

The following smaller enhancements for the February '21 release are intended to improve the user experience for Reporting 2.0:

Report Headers

The report output can now include the filter criteria used in the report. This is an existing feature of Custom Reports and will now be included in Reporting 2.0.

To enable the filter criteria to display, toggle the new **Display Filter Criteria** option to On.
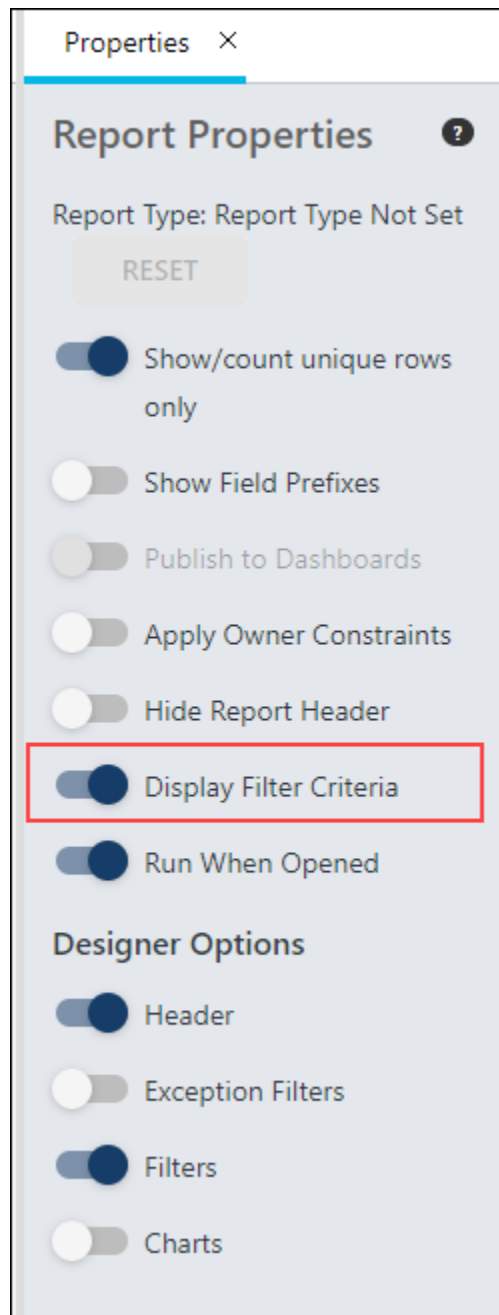
Calculated Fields

A new dateAdd function has been added to the list of Date functions for calculated fields. This function returns a date by adding the specified number of intervals to the specified date.

Dashboards

As of 2 February 2021, Reporting 2.0 dashboard widgets will go back to displaying chart data for up to 200,000 rows in a report and will no longer display up to 1,00,000 rows.

In addition, data exported through a Reporting 2.0 widget will go back to displaying up to 200,000 records instead of up to 1,000,000.

This is a change to the enhancements that were published in release notes on 27 January 2021 for the February '21 release, which indicated that users would have the ability to display up to 1,000,000 rows in a report and export up to 1,000,000 rows.

Implementation

Upon implementation of this enhancement, this functionality is available in all portals using Reporting 2.0.

Permissions

For information about Reporting 2.0 permissions, see the following:

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

RTDW Updates to Reporting API, RDW, and Data Exporter

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

Documentation that describes RTDW views and fields used in Custom Reports are updated and available in the **RTDW Documentation for Reporting API, RDW, and Data Exporter Community**. Join and follow the community to be notified of new posts and of upcoming changes occurring in this release and future deprecations scheduled in future releases. Information on deprecated objects and changes can be found in **RTDW - Feb 2021 Updates Reference Docs and Deprecations** and **DEX - Updates and Deprecations Feb 2021 (21.01)**.

For organizations using Reporting API, Replicated Data Warehouse (RDW), or Data Exporter, the changes and deprecated objects will be reflected in stage as of February 2 and in production with the release on February 19.

For clients using Data Exporter, new objects and replacements for deprecated objects are not automatically added to your export, they must be requested via a case to Global Customer Support. Replacement objects are made available to organizations six months prior to their deletion. To avoid disruptions, replacements for objects that will be deprecated with the February '21 Release must be requested before February 2 for stage and February 19 for production/pilot.

Data Exporter - Deprecated Objects Scheduled for February '21 Release

This table describes deprecated objects that are still available in the Data Exporter. These objects are scheduled to be removed in the February '21 Release. 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
transcript_curricula	None. Existing consumers of this object, if you wish to continue receiving this data beyond the deprecation date, please contact GPS so we can make arrangements.	Release 21.01.00 (Feb 2021)	Deleted
Field status_id in [devplan_training_core]	Field is_training_item_completed in [devplan_training_core]	Release 21.03.00 (Jul 2021)	Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
Referrer fields: applicant__referrer_username, applicant__referrer_user_ref, applicant__referrer_name, applicant__referrer_email in [applicant]	Use [users_core] for Referrer fields. Fields from [users_core]: user_login, user_ref, user_name_last, user_name_first, user_email applicant__referrer_username = user_login applicant__referrer_user_ref = user_ref applicant__referrer_name = user_name_last + ', ' + user_name_first applicant__referrer_email = user_email Note: Field applicant_referred_by in [applicant] object is internal identifier of the user (user_id in [users_core]) who referred the applicant. Refer to "Deprecated Objects - RTDW Documentation" for details.	Release 21.03.00 (Jul 2021)	Marked for deletion

Data Exporter - New Objects Scheduled for February '21 Release

The following new objects are being added to Data Exporter with the February '21 Release.

OBJECT PUBLIC NAME	DESCRIPTION	ADDITION DATE	ACTION
scorm_session	Scorm session	Release 21.01.00 (Feb 2021)	Added
scorm_subsession	Scorm subsession	Release 21.01.00 (Feb 2021)	Added

OBJECT PUBLIC NAME	DESCRIPTION	ADDITION DATE	ACTION
scorm_subsession_interaction	Scorm subsession interaction	Release 21.01.00 (Feb 2021)	Added
scorm_subsession_interaction_correct_response	Scorm subsession interaction correct response	Release 21.01.00 (Feb 2021)	Added
training_bundle_core	Training bundle. Also referred within the app as "subscriptions."	Release 21.01.00 (Feb 2021)	Added
training_bundle_manifest_core	Training bundle manifest. Course(s) which are part of a training bundle (subscription).	Release 21.01.00 (Feb 2021)	Added

RTDW - Deprecated Objects Scheduled for February '21 Release

This table describes the deprecated objects that are still available in RTDW. These objects are scheduled to be removed in the February '21 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
Training and Transcript	report.vw_rpt_transcript_curricula	report.vw_rpt_transcript_src_curriculum	Release 21.01.00 (Feb 2020)	Deleted
Recruiting	Referrer fields: applicant__referrer_username, applicant__referrer_user_ref, applicant__referrer_name, applicant__referrer_email in report.vw_rpt_applicant	Fields from report.vw_rpt_user: user_login, user_ref, user_name_last, user_name_first, user_email To get Referrer fields: 1. Join report.vw_rpt_applicant with report.vw_rpt_user on applicant_referred_by(report.vw_rpt_applicant) =	Release 21.03.00 (Jul 2021)	Marked for deletion

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
		user_id (report.vw_rpt_user). 2. Use [user_login], [user_ref], [user_name_last], [user_name_first], [user_email] fields from report.vw_rpt_user: applicant__referrer_username = user_login applicant__referrer_user_ref = user_ref applicant__referrer_name = user_name_last + ', ' + user_name_first applicant__referrer_email = user_email		

RTDW - New Views Scheduled for February '21 Release

The following new views are being added to RTDW with the February '21 Release.

CATEGORY	VIEW	DESCRIPTION	ADDITION DATE	ACTION
Training and Transcript	vw_rpt_training_bundle	Training bundle. Also referred within the app as "subscriptions."	Release 21.01.00 (Feb 2020)	Added
Training and Transcript	vw_rpt_training_bundle_manifest	Training bundle manifest. Course(s) which are part of a training bundle (subscription).	Release 21.01.00 (Feb 2020)	Added

Skills Profile and Capabilities Library (Early Adopter)

Skills Profile and Capabilities Library (Early Adopter)

Prior to skills profiles, many organizations faced challenges in setting up, maintaining, and scaling organizational skills, investing hundreds of hours defining the relevant skills for each job in their organization while employees had to manually add skills to their Universal Profile. Getting employees to fill out their Universal Profile with skills was often a struggle. Gathering feedback on skills was laborious and administrator-driven. There was a need for an accurate way to identify the talent landscape.

Cornerstone's AI-powered Skills Graph automatically detects and suggests skills that employees might have based on their profile data, making it easier for employees to declare what they're capable of, which skills they want to develop, and which they don't want to develop now. This enables more personalized content recommendations and more meaningful career development conversations.

With the Capabilities Library and Skills Profile:

o Cornerstone's AI-powered Skills Graph automatically imports skills into the Capabilities Library. (Administrators can screen skills before they are published for employees to see.)
o Cornerstone's AI-powered Skills Graph automatically associates relevant skills to each employee job title using data collected from over 250 million profiles worldwide, across all industries and organization sizes.
o Employees can declare which skills they currently have, which skills they want to further develop, and which ones they do not currently want to develop. (Employees are given a jump start with automatically suggested skills they can declare and the ability to view full skill descriptions.)
o Employees can also self-rate their proficiency, interest, and enjoyment for specific skills, and receive skill proficiency ratings from their peers.
o Organizations can continue to use their internally defined skills in addition to the skills from Cornerstone's Skills Graph.
o Organizations should experience a faster implementation time to get their capabilities library up and running.

This functionality is intended for organizations that are interested in gathering more data on their employees' capabilities and organizations that want to encourage employee-driven development, where employees can build robust profiles, request ratings from peers, and rate peers.

Capabilities Library

It is challenging for administrators to maintain a complete list of relevant skills for their organization. Using Cornerstone's Skills Graph, it becomes much easier for an organization to maintain the right list of skills. The Capabilities Library connects company-specific skills and competencies and the Cornerstone Skills Graph for a new administrator experience.

Skills Profile

Know your employees' capabilities at a deeper level with the Skills Profile. With the Skills Profile, it's easy for employees to quickly request manager, peer, or 360 skill ratings using

the out-of-the-box templates that come with the Skills Profile. Visibility can be controlled to ensure that only those intended can view rating results (private, public, or limited to certain relationships).

How Does this Enhancement Benefit My Organization?

With the Capabilities Library and Skills Profile, employees can manage their skills with intelligent skill suggestions using Cornerstone's new AI-powered Skills Graph and request skill proficiency ratings from their peers.

Included with the Open Beta (Available in Stage and Pilot with the October '20 Release)

- o Manage a library of capabilities
- o Create, edit, delete, and deactivate capabilities
- o Localize capability names and descriptions
- o Set portal preferences for proficiency levels and rating scales
- o Automatically import suggested skills into the Capabilities Library
- o Skills Profile View/Access Skills Profile from Universal Profile (UP)
- o User onboarding wizard to guide employees
- o Manually search and declare skills on profile
- o Peer ratings on proficiency
- o Request peer ratings
- o Automatically import suggested skills into the Capabilities Library
- o Self-rating on Proficiency, Interest, and Enjoyment
- o Confidence Ladder visualization of an employee's skill proficiency
- o Rating history to view previous skill ratings

Included with the Early Adopter (Available with the February 2021 Release)

- o Employees can view the full results from their rating requests.
- o Administrators can manage the status (draft, active, inactive) of each skill, affecting which skills can be seen by employees.
- o Administrators can configure rating templates and determine which kinds of ratings are available to employees.
- o Administrators can version rating scales.
- o Administrators have the option (during enablement) to run a one-time scan of all employee profiles using the Skills Graph, automatically generating suggested skills for all active users in the portal and pre-populating the library with skills relevant to the organization.
- o All features previously announced as part of Open Beta in October 2020.

Included with the Early Adopter (Available with the 19 March 2021 Patch)

- o Administrators can report on employee skills, including suggested, declared, and developing skills for each person.
- o Administrators can localize rating scales and template labels.

o Employees can open rating request shareable links using an SSO URL.

Considerations

AI-powered Skills Graph suggestions are supported for English, French, Spanish, German, and Portuguese languages. Administrators can manually localize skills into additional languages. Employees in non-supported languages can manually add skills to their profile.

Implementation

Skills Profile and Capabilities Library (Open Beta) features introduced in the October '20 Release are available today in stage and pilot.

Skills Profile and Capabilities Library (Early Adopter) features are available in stage and pilot by default at the start of UAT except for reporting, localizing rating scales and template labels, and SSO links for rating requests.

Skills Profile and Capabilities Library (Early Adopter) features will be available in production for all customers to self-enable in a post-release patch. Administrators in the System Administrator role will have access to the Skills Profile, Capabilities Preferences, and Capabilities Library by default.

Glossary

o Capability - Capabilities describe what a person can do or what they know. This may include skills, competencies, knowledge, and other types of data.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
Capability Library - Edit	Grants ability to view, create, and edit capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration

Capability Library - Manage	Grants ability to view, create, edit, and delete capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Preferences - Manage	Grants ability to create and edit proficiency levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration
User Rating Scales - Manage	Grants ability to manage rating scales for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Rating Templates - Manage	Grants ability to manage rating scale templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Security Roles

Upon release, the new *Capabilities - Skills Profile - View*, *Capability Library - Edit*, *Capability Library - Manage*, *Capability Preferences - Manage*, *User Rating Scales - Manage*, and *User Rating Templates - Manage* permissions are automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Enable Capabilities and Skills Profile

With this enhancement, a new section is available within Corporate Preferences, and this section enables administrators to enable and configure the Capabilities and Skills Profile functionality in their portal.

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

Permissions

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

Capabilities Enablement Settings

This is a new section.

This section enables administrators to enable the Capabilities and Skills Profile functionality. This section also enables administrators to copy all of the skills from the Resume section of the Universal Profile to the Capabilities Library.

The following options are available:

o **Enable the Capabilities system in your portal** - Select this option to enable the Capabilities and Skills Profile functionality in your system. This cannot be undone once the changes are saved; however, administrators can control permissions to access Capabilities functionality.
o **Copy all skills from the resume section of the Universal Profile into the Capabilities Library** - Select this option to copy all of the skills from the Resume section of the Universal Profile to the Capabilities Library. Selecting this option does not remove the skills from the user's Resume in Universal Profile.
o **Upon enablement, automatically generate suggested skills for every active user** - Select this option to run a one-time full portal scan, which uses the Skills Graph to generate suggested skills for each active user in the portal. The top suggested skills are automatically imported into your library, generating a pre-populated Capabilities Library tailored to your organization.

Note: You must then select the **SAVE** *button on the Corporate Preferences page in order to commit any changes in this section.*

Capabilities Enablement Settings

Capabilities will not affect any existing data or features for skills or competencies. Once the Capabilities system is enabled, this section will no longer be visible here.

- ☑ Enables the Capabilities system in your portal
- ☑ Copy all skills from the resume section of the Universal Profile into the Capabilities Library. This process may take up to 24 hours.
- ☑ Upon enablement, automatically generate suggested skills for every active user.

Capabilities Administration

Capabilities Library - Manage Capabilities

Capabilities describe what a person can do or what they know. The Capabilities Library enables administrators to view, create, edit, and delete capabilities. Once capabilities are available, users can add them to their profile as skills they have or skills they would like to develop.

To access the Capabilities Library, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > LIBRARY.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants ability to view, create, and edit capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Library - Manage	Grants ability to view, create, edit, and delete capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration

Create Capability

To create a capability, select the **CREATE** button. *See **Capabilities Library - Create/Edit Capability** on page 125 *for additional information.*

Edit Capability

To edit an existing capability, select the **Edit** link for the appropriate capability in the Capabilities list. *See* **Capabilities Library - Create/Edit Capability** on page 125 *for additional information.*

Delete Capability

To delete an existing capability, select the **Options** icon to the right of the appropriate capability in the Capabilities list, and select the **Delete** option. ***Note:*** *This option is not available for capabilities that are part of the Cornerstone Skills Graph.*

Search and Filter Capabilities

By default, all capabilities are listed by last modified date, with the most recently modified capabilities listed first.

o To change the sort order, select the appropriate sort option from the drop-down menu in the upper-right corner of the page.
o To search for a capability, enter the appropriate search terms in the **Search capabilities** field and select the Magnifying Glass icon 🔍.

Capabilities List

The following information is listed for each existing capability:

o Status - This indicates the status of the capability (e.g., draft, active, inactive). Only active capabilities can be added to user profiles or used in new ratings. Statuses can be modified in the action menu on the right side of the page.
o ID
o Name - This displays the name that was given for the capability when it was created or modified.
o Source - This displays how the capability was added to the system.
    o Cornerstone Application - This indicates that the capability was added manually by an administrator from within the system.
    o Cornerstone Skills Graph - This indicates that the capability was automatically added as part of Cornerstone's Skills Graph.
o Created - This displays the date on which the capability was created and the administrator who created it.
o Modified - This displays the date on which the capability was last modified and the administrator who modified it.

Capabilities Library - Create/Edit Capability

Capabilities describe what a person can do or what they know. Once capabilities are available, users can add them to their profile as skills they have or skills they would like to develop.

To create a capability from the Capabilities Library, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > LIBRARY. Then, select the **CREATE** button.

To edit a capability from the Capabilities Library, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > LIBRARY. Then, select the **Edit** link to the right of the appropriate capability.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants ability to view, create, and edit capabilities via the Capability Library. Administrators with this permission cannot delete capabilities or change the status of a capability. This permission cannot be constrained. This is an administrator permission.	Core Administration
Capability Library - Manage	Grants ability to view, create, edit, and delete capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration

Create Capability

When you select the **CREATE** button on the Capability Library page, a flyout opens. Enter the following information for the capability:
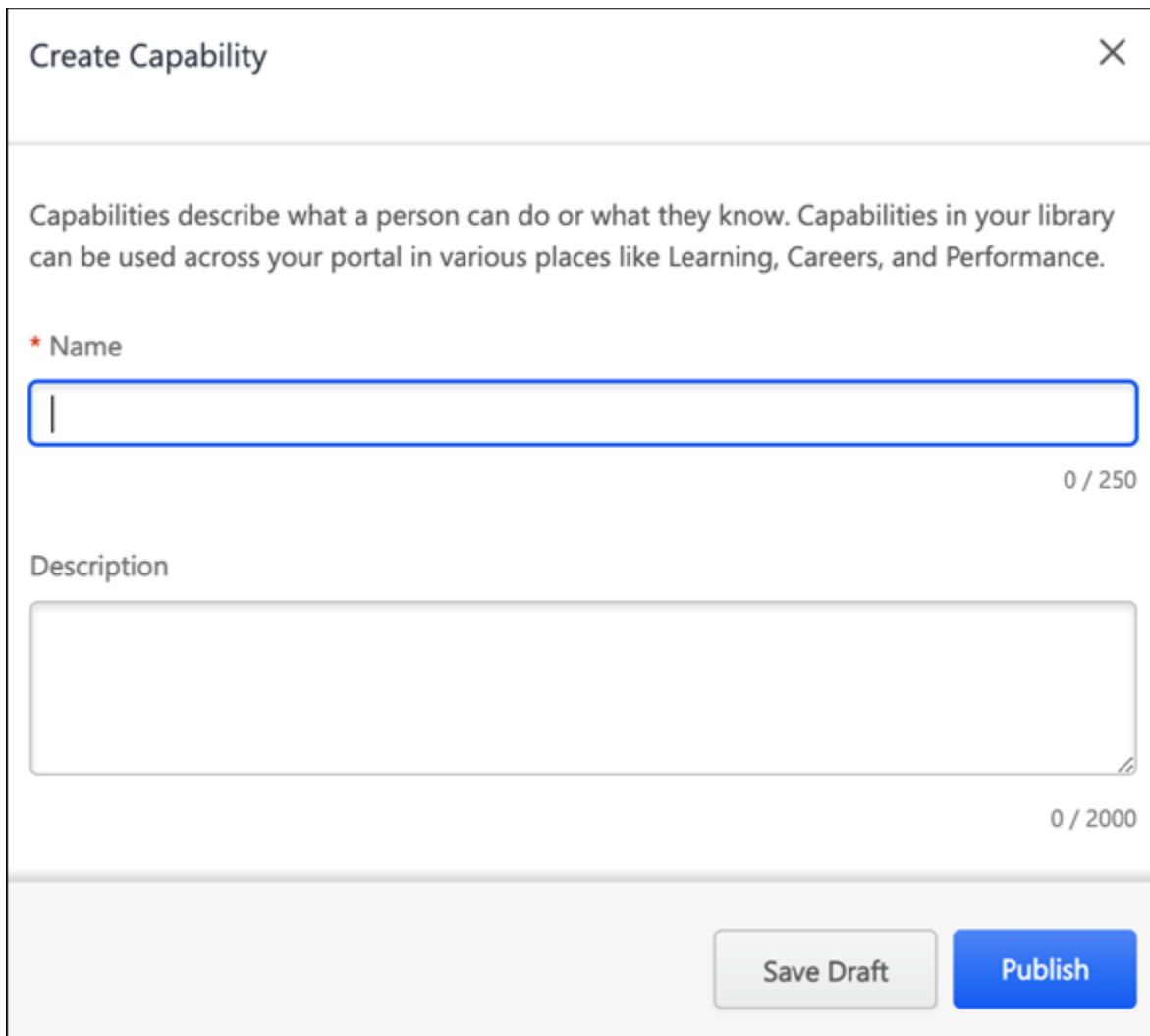
o Name - Enter a descriptive name for the capability. This should clearly indicate the skill or knowledge associated with the capability so that end users and administrators understand the capability. This field is required. The character limit for this field is 250.
o Description - Enter a detailed description for the capability. This should provide additional information about the capability so that all users and administrators understand the capability. This field is optional. The character limit for this field is 2000.

If the administrator has the Capability Library - Manage permission, two options will appear during creation, **SAVE DRAFT** or **PUBLISH**. Capabilities in a draft status are not visible to users.

If the administrator only has the Capability Library - Edit permission, a capability can only be created in a draft status.

If the Capability is ready to be used by users after entering the appropriate details, select the **PUBLISH** button in the flyout. The new capability is added, and you are presented with two options:

o Done - Select this option to return to the Capability Library. *See Capabilities Library - Manage Capabilities.*

o Edit - Select this option to navigate to the Edit Capability page where you may edit the capability details. *See the Edit Capability section below for additional information.*

Edit Capability

When you select the **Edit** link on the Capability Library page, the Edit Capability page opens.

Enter the following information on the General Settings tab for the capability:

o ID - This is the unique identifier for the capability. When a capability is created from the Capability Library, this ID is automatically generated by the system.

- o Name - Enter a descriptive name for the capability. This should clearly indicate the skill or knowledge associated with the capability so that end users and administrators understand the capability. This field is required. The character limit for this field is 250. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.
- o Description - Enter a detailed description for the capability. This should provide additional information about the capability so that all users and administrators understand the capability. This field is optional. The character limit for this field is 2000. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.

For capabilities in a draft or inactive status:

- o If the administrator has the Capability Library - Manage permission, two options will appear during editing, **SAVE** or **PUBLISH**. If publish is selected, changes are first saved before the capability status is changed to active.
- o If the administrator only has the Capability Library - Edit permission, the user may save changes, but cannot publish the capability.

For capabilities in an active status:

- o Changes to a capability can be saved, but no status transitions are allowed from the Edit Capability page.

Back to Library

When editing a capability, you may select the **BACK TO LIBRARY** button to return to the Capabilities Library. *See Capabilities Library - Manage Capabilities.*

Capabilities Preferences - Edit Proficiency Levels

Proficiency levels help describe a user's proficiency in a skill using unified, standard language across the organization to easily compare across skills and people. When a user is rated using proficiency levels, this helps provide more targeted assessment questions and training recommendations. There is a limit of 10 proficiency levels per portal.

It is recommended that organizations set up their proficiency levels to mirror their default rating scale for proficiency without the N/A and No Proficiency ratings.

To edit Proficiency Levels in Capabilities Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PREFERENCES. The Proficiency Levels tab is selected by default.

The default levels can be modified. To modify the proficiency level labels, add or remove levels, or edit level descriptions, select the **EDIT PROFICIENCY LEVELS** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Preferences - Manage	Grants ability to create and edit proficiency levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administratio n

Edit Name and Description

The following text fields are available for each proficiency level:

o **Name** - Enter a descriptive name for the proficiency level. This should clearly indicate the level of competence that is associated with the level so that end users and administrators may confidently understand the difference between the proficiency levels. This field is required. The character limit for this field is 50.

o **Description** - Enter a detailed description for the proficiency level. This should provide additional information about the proficiency level so that all users and administrators understand the how to utilize the proficiency level. This field is optional. The character limit for this field is 200.

Add Proficiency Level

By default, three proficiency levels are available, but organizations may choose to build a more granular proficiency level by adding levels.

To add a new proficiency level, select the **ADD LEVEL** button. A new level is added at the bottom of the list.

Change Proficiency Level Order

The proficiency level at the top of the list always represents the level with the least proficiency, and the proficiency level at the bottom of the list always represents the level with the most proficiency.

You may change the order of the proficiency levels by selecting the up arrow ↑ or down arrow ↓ next to the appropriate proficiency level.

Remove Proficiency Level

To remove a proficiency level from the list, select the Remove icon ✕ next to the appropriate proficiency level.

Save/Cancel

All changes on this page are not saved until the page is saved. This includes changes to level names, adding new levels, and reordering levels.

To save your changes to the proficiency levels, select the **SAVE** button.

To exit the Capabilities Preferences page without saving your changes, select the **CANCEL** button.

Capability Rating Scales - Manage

Rating Scales are used to set the values that employees can select when completing a rating of themselves or others. They represent an exact point value that can be converted into a percentage based on the scale range.

Rating scales are commonly used to measure proficiency, but they may also be used to measure something other than skill proficiency. For example, you might want to ask employees how much they want to develop a skill. Your scale might look like this:

o Very Interested
o Somewhat Interested
o Not Interested

A skill-specific rating scale could even use statements to describe different scores using domain-specific phrasing like this (Skill-specific scales will be available in a future release):

o Plays piano like a virtuoso
o Can play a nice tune with sheet music available
o Knows the basic keys and scales
o Has never played piano

Administrators may view and edit the rating scales that are used to measure a user's enjoyment, interest, and proficiency in a capability.

To manage capabilities rating scales, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > RATING SCALES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Scales - Manage	Grants ability to manage rating scales for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Edit Rating Scale

To edit a capability rating scale, select the **Edit** link for the appropriate rating scale in the list. *See* **Capability Rating Scales - Edit** on page 134 *for additional information.*

Rating Scales List

The following information is listed for each existing capability rating scale:

o Name - This displays the name that was given for the rating scale when it was created or modified.
o Dimension - This displays whether the rating scale is used to rate a user's proficiency, interest, or enjoyment in a capability.
o Range - This displays the scale's lowest rating and highest rating.
o Last Modified - This displays the date on which the rating scale was last modified and the administrator who modified it.

Default Rating Scales

The following capability rating templates are available by default:

o Standard Enjoyment Rating Scale
o Standard Interest Rating Scale
o Standard Proficiency Rating Scale

Capability Rating Scales - Edit

Rating Scales are used to set the values that employees can select when completing a rating of themselves or others. They represent an exact point value that can be converted into a percentage based on the scale range. Administrators may customize rating scales to suit their organizational needs.

When creating a capability assessment, administrators may specify the appropriate rating scale.

To edit a Capability Rating Scale, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > RATING SCALES. Then, select the **Edit** link to the right of the appropriate rating scale.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Scales - Manage	Grants ability to manage rating scales for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Edit Rating Scale   ✕

This rating scale has been used in a previous rating. To ensure an accurate history of any previous ratings, changes to the minimum, maximum, or N/A values requires a new version. You can edit the text of Score Display or Description without creating a new version but those changes will apply to any previous ratings as well as future ratings.

The new version will replace the original version in all rating templates where is it being used.

Create Version

* Minimum   * Maximum

0   5   ☐ Include NA

English (US) ⌄

Score (%)	Score Display	Description
0 (0%)	Do not have this skill	
	22 / 100	0 / 500
1 (20%)	Novice	
	6 / 100	0 / 500
2 (40%)	Beginner	
	8 / 100	0 / 500
3 (60%)	Intermediate	
	12 / 100	

Cancel   Update

Create New Version

If the rating scale has been used in a previous capability rating, then the **Minimum**, **Maximum**, and **Include NA** options can only be modified if a new version of the rating scale is created. This precaution ensures an accurate history of any previous ratings. However, changes can be made to the **Score Display** and **Description** text fields without creating a new version.

To create a new version of the rating scale, select the **CREATE VERSION** button at the top of the flyout. The new version only applies to future ratings. ***Note:*** *This button is only available if the rating scale has been used in a previous capability rating.*

When a new version is created, the new version automatically replaces the original version in all rating templates where the rating scale is being used.

Set Minimum and Maximum Values

The Minimum and Maximum values for the rating scale define the lowest rating value and the highest rating value. The rating scale is divided into even segments based on the minimum and maximum values.

o **Minimum** - This represents 0% capability level. By default, this value is set to zero.
o **Maximum** - This represents 100% capability level. By default, this value is set to five.

After updating the Minimum and Maximum values, select the **UPDATE** button to refresh the rating scale with the new range values. ***Note:*** *Selecting* **UPDATE** *does not save your changes to the rating scale. To save your changes, you must select the* **SAVE** *button.*

If the rating scale has been used in a previous capability rating, these values cannot be modified. If you must modify these values, then create a new version of the rating scale. *See the Create New Version section.*

Include NA Value in Rating Scale

The Not Applicable (N/A) value may be included in the rating scale to allow assessors to indicate that the capability does not apply to the assessee. When this rating is selected, a N/A rating is available at the top of the rating scale.

After selecting or deselecting the Include N/A setting, select the **UPDATE** button to refresh the rating scale with the new setting. ***Note:*** *Selecting* **UPDATE** *does not save your changes to the rating scale. To save your changes, you must select the* **SAVE** *button.*

If the rating scale has been used in a previous capability rating, this value cannot be modified. If you must modify this value, then create a new version of the rating scale. *See the Create New Version section.*

Localization Language

If multiple languages are enabled for your portal, a Language drop-down is available above the Score Display and Description settings. Select a language from this drop-down to provide a localized Score Display and Description for the selected language.

Edit Score Display and Description

Based on the rating scale configuration, the capability assessment scores are listed in the Score (%) column. The raw score value and the corresponding score percentage is displayed.

The following text fields are available for each rating scale score:

- **Score Display** - Enter the text that will display for the rating scale score. This may be a numeric value or a text value. By default, this field is set to the numeric score. This field is required. The character limit for this field is 100.
- **Description** - Enter a detailed description for the rating scale score. This should provide additional information about the score so that all users and administrators understand the how to utilize the score. This field is optional. The character limit for this field is 500.

Save/Cancel/Create Version

All changes on this page are not saved until the page is saved. This includes changes to minimum and maximum values, the Include NA setting, and score display and description values.

To save your changes to the default rating scale, select the **SAVE** button.

To exit the Edit Rating Scale page without saving your changes, select the **CANCEL** button.

If you are creating a new version of a rating scale, a **CREATE VERSION** button is available. Select this button to create the new version. The new version only applies to future ratings.

Capability Rating Templates - Manage

Rating Templates are the package of configuration choices made by the administrator that form the rating experiences for the end user. These templates exist behind-the-scenes for the end user, while guiding them and minimizing friction.

Prior to editing a rating template, a best practice is to configure your rating scales

To manage capabilities rating templates, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > RATING TEMPLATES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage rating scale templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Manage Rating Templates

Choose where you want rating templates to appear in your portal, and configure the text to be displayed to users.

Name	Dimension	Feature Connectors	Last Modified	
Self Rating on Proficiency	Proficiency	2		Edit
Self Rating on Interest	Enjoyment, Interest	2		Edit
Peer Rating (private)	Proficiency	2		Edit
Peer Rating (public)	Proficiency	2		Edit
Private Proficiency Rating	Proficiency	1		Edit
Proficiency Ratings shared with your Manager	Proficiency	1		Edit

Edit Rating Template

To edit a capability rating template, select the **Edit** link for the appropriate template in the list. *See* **Capability Rating Templates - Edit** on page 140 *for additional information.*

Rating Templates List

The following information is listed for each existing capability rating template:

o Name - This displays the display name of the rating template that appears to users on the cover page before starting a rating.
o Dimension - This displays whether the template is used to rate a user's proficiency, enjoyment, or interest. A template may have multiple dimensions.
o Feature Connectors - This displays the number of areas or features in which the template can be accessed by users.
o Last Modified - This displays the date on which the rating template was last modified and the administrator who modified it.

Default Rating Templates

The following capability rating templates are available by default:

o Self Rating on Proficiency - This template is used for users to rate their own proficiency in a capability. By default, the ratings that raters provide using this template are visible to the rater and the rater's direct manager.
o Self Rating on Interest - This template is used for users to rate their own interest in a capability. By default, the ratings that raters provide using this template are visible to the rater.
o Peer Rating (private) - This template is used for a user's peers to privately rate the user's proficiency in a capability. By default, the ratings that raters provide using this template are visible to only the rater and the user being rated.
o Peer Rating (public) - This template is used for a user's peers to publicly rate the user's proficiency in a capability. By default, the ratings that raters provide using this template are visible to everyone.
o Private Proficiency Rating - This template is used for anyone to privately rate a user's proficiency in a capability. By default, the ratings that raters provide using this template are visible to the rater and the user being rated.
o Proficiency Ratings shared with your Manager - This template is used for anyone to privately rate a user's proficiency in a capability. By default, the ratings that raters provide using this template are visible to the rater, the user being rated, and the user's direct manager.

Capability Rating Templates - Edit

Rating Templates are the package of configuration choices made by the administrator that form the rating experiences for the end user. These templates exist behind-the-scenes for the end user, while guiding them and minimizing friction.

When editing a capability rating template, the settings are separated into two tabs:

o General Settings - The General Settings tab enables administrators to configure settings such as the Display Name, Instructions, Menu Action Name, and whether the introduction page is displayed when launching a rating. *See* **Capability Rating Templates - Edit - General Settings** on page 142 *for additional information.*

o Feature Connectors - The Feature Connectors tab enables administrators to configure where the template is available for users, such as the Skills - Declared and Skills - To Develop sections of the Skills Profile. *See* **Capability Rating Templates - Edit - Feature Connectors** on page 146 *for additional information.*

To edit a Capability Rating Template, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > RATING TEMPLATES. Then, select the **Edit** link to the right of the appropriate rating template.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage rating scale templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Edit Template   Exit

General Settings

Feature Connectors

General Settings

* Display Name

Self Rating on Proficiency   ⊕

This name appears to users on the cover page   26 / 100

Instructions

Rate your proficiency so that you can track your skill improvement over time and get more personalized   ⊕
development recommendations and career advice.

149 / 1000

* Menu Action Name

Rate My Proficiency   ⊕

This text appears in menus and buttons, calling the user to take the action   19 / 250

☑ Hide introduction page for rating

* Rater Relation

Self   ∨

Select who can rate the target user

Dimensions

Select which dimensions are included in this template. You can use the following tags to populate data specific to each rating:

    <capability.name> of the capability being rated
    <firstlast.name> of the person being rated

☑ Proficiency

Question presented to the rater

Please rate your proficiency with: <capability.name>   ⊕

0 / 200

☐ Interest

☐ Enjoyment

Default Visibility

Configure who will be able to see ratings from this template

☑ Rater

☐ Target User

☐ Target User's Direct Manager

☐ Everyone

Cancel   Save

Capability Rating Templates - Edit - General Settings

Rating Templates are the package of configuration choices made by the administrator that form the rating experiences for the end user. These templates exist behind-the-scenes for the end user, while guiding them and minimizing friction.

When editing a template, the settings are divided into two tabs, General Settings and Feature Connectors.

The General Settings tab enables administrators to configure settings such as the Display Name, Instructions, Menu Action Name, and whether the introduction page is displayed when launching a rating.

To edit a Capability Rating Template, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > RATING TEMPLATES. Then, select the **Edit** link to the right of the appropriate rating template.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage rating scale templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Edit Template   Exit

General Settings

Feature Connectors

General Settings

* Display Name

Self Rating on Proficiency   🌐

This name appears to users on the cover page   26 / 100

Instructions

Rate your proficiency so that you can track your skill improvement over time and get more personalized   🌐
development recommendations and career advice.

149 / 1000

* Menu Action Name

Rate My Proficiency   🌐

This text appears in menus and buttons, calling the user to take the action   19 / 250

☑ Hide introduction page for rating

* Rater Relation

Self   ⌄

Select who can rate the target user

Dimensions

Select which dimensions are included in this template. You can use the following tags to populate data specific to each rating:

    <capability.name> of the capability being rated
    <firstlast.name> of the person being rated

☑ Proficiency

Question presented to the rater

Please rate your proficiency with: <capability.name>   🌐

0 / 200

☐ Interest

☐ Enjoyment

Default Visibility

Configure who will be able to see ratings from this template

☑ Rater

☐ Target User

☐ Target User's Direct Manager

☐ Everyone

Cancel   Save

Display Name

Specify the title text that appears on the introduction page before providing a rating. This field is required. The character limit for this field is 100. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.

Instructions

Specify the instructional text that appears on the introduction page before providing a rating. This field is optional. The character limit for this field is 1000. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.

Menu Action Name

Specify the text that appears in menus when launching the template. For example, if the template is used for users to rate their own proficiency in the skill, the menu action name may be "Rate Myself." Similarly, if the template is used for users to request a proficiency rating from others, the menu action name may be "Request a Proficiency Rating."

This field is required. The character limit for this field is 250. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.

Hide Introduction Page for Rating

Select this option to hide the introduction page for rating requests using this template. For example, if the menu action is very self-explanatory (e.g., Provide a Public Rating), you may not need an introduction page. However, if the visibility of ratings is sensitive or the purpose is specific, an introduction page is recommended.

Rater Relation

From the drop-down menu, select who can rate the target user using this template based on their relationship to the target user. This enables administrators to tailor the template to reflect the language for a self rating, a peer rating, a manager rating, etc. The following options are available:

o Anyone (excluding self) - Anyone except the target user can rate the target user.
o Indirect Manager - The target user's indirect manager can rate the target user.
o Manager - The target user's manager can rate the target user.
o Self - The target user can rate the target user.
o Subordinates - The target user's subordinates can rate the target user.

Dimensions

A user can be rated on a capability in terms of three different aspects or dimensions. The three dimensions are the user's proficiency, interest, or enjoyment with regards to the capability.

Select which dimensions are associated with this template. For example, if the template is used to rate a user's interest and enjoyment in a skill, then select the Interest and Enjoyment dimensions.

For each selected dimension, provide the prompt text that is presented to the capability rater. Administrators may use tags to populate data such as the capability name or the name of the user who is being rated.

Default Visibility

Select who can view the ratings that are provided using this template.

Save/Cancel/Exit

Select the **SAVE** button at the bottom of the page to save the template settings and return to the Manage Rating Templates page. *See* **Capability Rating Templates - Manage** on page 138 *for additional information.*

Select the **CANCEL** button at the bottom of the page to discard any unsaved changes to the template settings and return to the Manage Rating Templates page. *See* **Capability Rating Templates - Manage** on page 138 *for additional information.*

Select the **EXIT** button at the top of the page to discard any unsaved changes to the template settings and return to the Manage Rating Templates page. *See* **Capability Rating Templates - Manage** on page 138 *for additional information.*

Capability Rating Templates - Edit - Feature Connectors

Rating Templates are the package of configuration choices made by the administrator that form the rating experiences for the end user. These templates exist behind-the-scenes for the end user, while guiding them and minimizing friction.

When editing a template, the settings are divided into two tabs, General Settings and Feature Connectors.

The Feature Connectors tab enables administrators to configure where the template is available for users, such as the Skills - Declared and Skills - To Develop sections of the Skills Profile.

To edit a Capability Rating Template, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > RATING TEMPLATES. Then, select the **Edit** link to the right of the appropriate rating template.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage rating scale templates for capabilities. This permission cannot be constrained. This is an administrator permission. This permission only works when used in conjunction with the User Rating permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Select Template Availability

The Feature Connectors tab displays all of the areas in which a capability rating template may be used.

To enable the template to be available in an area, select the **Active** toggle for the appropriate feature area.

Menu Action Name

When the template is active for a feature, administrators have the option to customize the language that is presented to the user when using the template in the specified area. The default language from the General Settings tab is used by default.

Available Features

The following areas or feature are available:

o Rating Card - Users may provide ratings for a skill in the Skills Details flyout, which opens after selecting a skill in the Skills Profile. *See* **Skills Profile - View Skill Details** on page 163 *for additional information.*

o Request Rating About Self - Users may request a rating from their Skills Profile. *See* **Skills Profile - Request Feedback for Skill Proficiency** on page 173 *for additional information.*

- o Skills - Declared - Users may request a rating from the *Your Skills* section in their Skills Profile. *See* **Skills Profile** on page 149 *for additional information.*
- o Skills - To Develop - Users may request a rating from the *Skills You Want to Develop* section in their Skills Profile. *See* **Skills Profile** on page 149 *for additional information.*

Save/Cancel/Exit

Select the **SAVE** button at the bottom of the page to save the template settings and return to the Manage Rating Templates page. *See* **Capability Rating Templates - Manage** on page 138 *for additional information.*

Select the **CANCEL** button at the bottom of the page to discard any unsaved changes to the template settings and return to the Manage Rating Templates page. *See* **Capability Rating Templates - Manage** on page 138 *for additional information.*

Select the **EXIT** button at the top of the page to discard any unsaved changes to the template settings and return to the Manage Rating Templates page. *See* **Capability Rating Templates - Manage** on page 138 *for additional information.*

Skills Profile

Skills Profile

The Skills Profile page enables users to view, select, and configure the skills they have and the skills they'd like to develop.

To access the Skills Profile page, go to HOME > UNIVERSAL PROFILE. Then, click the Skills tab.

To access another user's Universal Profile - Bio page, select the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Skills Profile page by clicking the Skills tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Back to Profile

Skills You Want to Develop

000 +

We'll help you stay on track with your progress and prioritize suggested learning and development paths based on your preferences.

🔖 finance 000

Your Skills

000 +

These are your confirmed skills. We'll help you track progress and identify relevant opportunities for development.

finance 000   project management 000   accounting 000

Skills You Might Have

Based on your profile information and feedback from your team

financial reporting 000   leadership development 000   income statement 000

financial accounting 000   financial analysis 000   internal controls 000

See more ⌄

Skills You Don't Want to Develop

+

We'll reduce recommendations for training & development for this skill, so you can focus on your development priorities.

👁 tax 000

Back to Profile

Select the **BACK TO PROFILE** button to navigate to the Universal Profile Bio page for the user whose Skills Profile you are viewing.

Get Started

Select the **GET STARTED** button to begin the Get Started wizard. This wizard guides you through the process of selecting which skills you currently have, which skills you want to develop, and which skills you do not want to develop. *See Skills Profile - Get Started Wizard.*

Skills You Want to Develop

This section displays any skills you have indicated that you want to develop. These skills may be used to suggest learning and development paths.

Add Skills You Want to Develop

You may add skills you want to develop by selecting the Add Skill icon + in the upper-right corner of the section or the **DEVELOP SKILLS** button. *Note: The* **DEVELOP SKILLS** *button is only available if no skills have been selected in this section. See Skills Profile - Add Skill.*

Options for Skills You Want to Develop

In this section, you can perform the following actions for any skills listed in this section:

o View Skill Details - To view the full description of a skill and your skill rating, select the left side of a skill in your profile. The Skill Details appear in a flyout on the right. *See Skills Profile - View Skill Details.*

o Remove Skill - To remove a skill from this section, select the menu icon on the right side of the skill button. Then, select **Remove**.

o Hide Recommendations - To hide learning and development recommendations for a skill in this section, select the menu icon on the right side of the skill button. Then, select **Hide recommendations**. The skill is removed from this section, it is added to the *Skills You Don't Want to Develop* section, and it is no longer suggested as a skill to develop. You may still search for this skill by name when adding skills to develop.

o Rate My Interest - To rate your interest in a skill from this section, select the menu icon on the right side of the skill button. Then, select **Rate My Interest**. *See Skills Profile - Rate My Interest.*

o Request Feedback - To request feedback from others regarding your proficiency in a skill from this section, select the menu icon on the right side of the skill button. Then, select **Request Feedback**. *See* **Skills Profile - Request Feedback for Skill Proficiency** on page 173 *for additional information.*

Your Skills

This section displays any skills you have indicated that you already have. These can be skills in any proficiency level (e.g., novice, intermediate, expert). These skills will be used to track progress and identify relevant opportunities for development.

Add Skills You Have

You may add skills that you have by selecting the Add Skill icon ＋ in the upper-right corner of the section or the **ADD SKILLS** button. ***Note:*** *The* **ADD SKILLS** *button is only available if no skills have been selected in this section. See Skills Profile - Add Skill.*

Options for Skills You Have

In this section, you can perform the following actions for any skills listed in this section:

○ View Skill Details - To view the full description of a skill and your skill rating, select the left side of a skill in your profile. The Skill Details appear in a flyout on the right. *See Skills Profile - View Skill Details.*

○ Want to Develop - If you want to develop a skill in this section, select the menu icon on the right side of the skill button. Then, select **Want to develop**. The skill remains in the *Your Skills* section, but it is also added to the *Skills You Want to Develop* section. These skills may be used to suggest learning and development paths.

○ Hide Recommendations - To hide learning and development recommendations for a skill in this section, select the menu icon on the right side of the skill button. Then, select **Hide recommendations**. The skill remains in this section, but it is also added to the *Skills You Don't Want to Develop* section, and it is no longer suggested as a skill to develop. You may still search for this skill by name when adding skills to develop.

○ Remove Skill - To remove a skill from this section, select the menu icon on the right side of the skill button. Then, select **Remove**.

○ Rate My Proficiency - To rate your proficiency in a skill from this section, select the menu icon on the right side of the skill button. Then, select **Rate My Proficiency**. *See Skills Profile - Rate Skill Level.*

○ Rate My Interest - To rate your interest in a skill from this section, select the menu icon on the right side of the skill button. Then, select **Rate My Interest**. *See Skills Profile - Rate My Interest.*

○ Request Feedback - To request feedback from others regarding your proficiency in a skill from this section, select the menu icon on the right side of the skill button. Then, select **Request Feedback**. *See* **Skills Profile - Request Feedback for Skill Proficiency** on page 173 *for additional information.*

Skills You Might Have

This section displays a list of skills that you may have based on your current position.

Options for Skills You Might Have

In this section, you can perform the following actions for any skills listed in this section:

○ View Skill Details - To view the full description of a skill and your skill rating, select the left side of a skill in your profile. The Skill Details appear in a flyout on the right. *See Skills Profile - View Skill Details.*

○ Want to Develop - If you want to develop a skill in this section, select the menu icon on the right side of the skill button. Then, select **Want to develop**. The skill is removed

from this section and added to the *Skills You Want to Develop* section. These skills may be used to suggest learning and development paths.
- o Hide Recommendations - To hide learning and development recommendations for a skill in this section, select the menu icon on the right side of the skill button. Then, select **Hide recommendations**. The skill is removed from this section, it is added to the *Skills You Don't Want to Develop* section, and it is no longer suggested as a skill to develop. You may still search for this skill by name when adding skills to develop.
- o Add to Profile - If you have one of the skills in this section in any proficiency level (e.g., novice, intermediate, expert), select the menu on the right side of the skill button. Then, select **Add to profile**. The skill is removed from this section and added to the *Your Skills* section. These skills will be used to track progress and identify relevant opportunities for development.
- o Remove Skill - To remove a skill from this section, select the menu icon on the right side of the skill button. Then, select **Remove**.

Skills You Don't Want to Develop

This section displays any skills you have indicated that you do not want to develop. The system will not suggest these skills any longer, and they will not be used to suggest learning and development paths.

Add Skills You Don't Want to Develop

You may add skills that to this section by selecting the Add Skill icon ✛ in the upper-right corner of the section or the **SELECT SKILLS** button. *Note: The* **SELECT SKILLS** *button is only available if no skills have been selected in this section. See Skills Profile - Add Skill.*

Options for Skills You Don't Want to Develop

In this section, you can perform the following actions for any skills listed in this section:

- o View Skill Details - To view the full description of a skill and your skill rating, select the left side of a skill in your profile. The Skill Details appear in a flyout on the right. *See Skills Profile - View Skill Details.*
- o Want to Develop - If you want to develop a skill in this section, select the menu icon on the right side of the skill button. Then, select **Want to develop**. The skill is removed from this section, and it is added to the *Skills You Want to Develop* section. These skills may be used to suggest learning and development paths.
- o Remove Skill - To remove a skill from this section, select the menu icon on the right side of the skill button. Then, select **Remove**.

Skills Profile - Get Started Wizard

The Skills Profile enables users to select which skills they currently have and skills they want to develop.

To access the Skills Profile, go to **HOME > UNIVERSAL PROFILE**. Then, select the Skills tab.

When users first access their Skills Profile, they are prompted with the "Get Started" menu that guides them through the process of selecting their current skills and skills they want to develop.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Step 1 - Get Started or Skip

Note: This step is skipped if you select the **GET STARTED** *button on the Skills Profile page.*

When the Get Started menu opens, you are prompted to either get started or skip the wizard.

o **GET STARTED** - Select this button to begin the Get Started wizard. This wizard guides you through the process of selecting which skills you currently have, which skills you want to develop, and which skills you do not want to develop.

o **SKIP** - Select this button to skip the Get Started wizard. Users who skip the wizard may initiate the wizard from the Skills Profile page. *See Skills Profile.*

Step 2 - Select Skills You Have

In this step, select three or more skills that you already have. These can be skills in any proficiency level (e.g., novice, intermediate, expert). By default, the wizard displays a list of skills that are associated with your current position and any previous positions included in your Universal Profile Resume.

To select a skill, you may select one of the listed skills or search for a skill that is not listed. When you select a skill, it is displayed below the search field. You may remove a skill by selecting the X next to the skill.

After selecting three or more skills, select the **CONTINUE** button.

Step 3 - Select Skills to Develop

In this step, select one or more skills that you want to develop. These skills may be used to suggest learning and development paths. By default, the wizard displays a list of skills that are associated with your current position.

To select a skill, you may select one of the listed skills or search for a skill that is not listed. This may be a skill that you already have or one you do not currently have. When you select a skill, it is displayed below the search field. You may remove a skill by selecting the X next to the skill.

After selecting one or more skills, select the **CONTINUE** button.

Step 4 - Select Skills to Reduce Recommendations

In this step, select any skills that you do not want to develop. This step is optional. If you select skills in this step, the system will reduce recommendations for training and development for the selected skills. This helps you to focus on the skills that you do want to develop. By default, the wizard displays a list of skills that are associated with your current position.

To select a skill, you may search for the skill. When you select a skill, it is displayed below the search field. You may remove a skill by selecting the X next to the skill.

This step is optional. Select the **FINISH** button to submit your selections. You may adjust your selections at any time via the Skills Profile page. *See Skills Profile.*

Skills Profile - Add Skill

The Skills Profile page enables users to view and manage skills they have, skills they want to develop, and skills they do not want to develop.

Users can add skills to any of the sections by selecting the Add Skill icon + in the upper-right corner of the appropriate section. This opens the Manage Skills flyout.

To select a skill, you may select one of the listed skills or search for a skill that is not listed. When you select a skill, it is displayed below the search field. You may remove a skill by selecting the X next to the skill.

After selecting one or more skills, select the **ADD** button. The selected skills are added to your Skills Profile.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Manage Skills   ✕

Add skills to develop

🔍 Enter a skill

🔖 leadership development ✕

Suggested Skills to Develop

project management ✛   accounting ✛   financial reporting ✛

income statement ✛   financial accounting ✛   financial analysis ✛

internal controls ✛   general ledger ✛   account reconciliation ✛

budgets ✛   accounts receivable ✛   forecasting ✛   accounts payable ✛

accountants ✛   audit ✛   payroll ✛   bookkeeping ✛

bank reconciliation ✛   invoicing ✛   reporting ✛

Cancel   **Add**

Skills Profile - View Skill Details

The Skills Details flyout shows the skill ID, name, description, and proficiency rating. If the user's proficiency level has not been rated for the skill, then the user has the option to rate their proficiency level for the skill.

To view the Skill Details for a skill, navigate to the Skills Profile page. Then, select the skill name of a skill in your profile. *See Skills Profile.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Skill Details ✕

SKL-522

tax

A tax is a financial charge or other levy imposed upon a taxpayer (an individual or legal entity) by a state or the functional equivalent of a state to fund various public expenditures. A failure to pay, or evasion of or resistance to taxation, is

Show More

What is your current expertise level?

Quickly rate yourself to track your improvement over time and get more personalized development.

Rate Myself

Skill Details   ✕
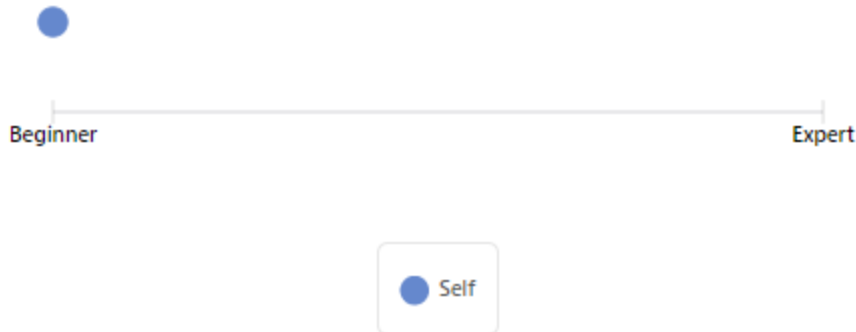
SKL-522

tax

A tax is a financial charge or other levy imposed upon a taxpayer (an individual or legal entity) by a state or the functional equivalent of a state to fund various public expenditures. A failure to pay, or evasion of or resistance to taxation, is

Show More

Ratings   ↗

Beginner   Expert

● Self

Rate My Proficiency

If a rating template is active with the feature connector "Rating Card" selected, a **RATE MY PROFICIENCY** button is available, allowing the user to launch a self-rating on proficiency. *See* **Capability Rating Templates - Edit - Feature Connectors** on page 146 *for additional information.*

Select this button to rate your proficiency level for the skill. *See Skills Profile - Rate Skill Level.*

Ratings

If you have a rating for the skill, then a Ratings chart is available in the flyout. This chart displays any ratings that you have provided and any other ratings that are visible to you. The proficiency levels are configurable by the system administrator.

Skills Profile - Rate Skill Level

From the Skills Profile page, users can rate their proficiency with skills they possess and skills they want to develop.

Users may rate their skill level in the following ways:

o Within the *Your Skills* section of the Skills Profile page, select the menu icon on the right side of the skill button. Then, select **Rate My Proficiency**. ***Note:*** *This option is only available for skills that the user has identified as a skill that they have. See Skills Profile.*

o Within the Skill Details flyout, select the **RATE MYSELF** button. ***Note:*** *This button is only available if the user has not yet rated their skill level. See Skills Profile - View Skill Details.*

Within the Rate Skill Level pop-up, select the appropriate skill proficiency. Then, select the **SUBMIT** button to save the selected skill proficiency.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administratio n
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administratio n

Skills Profile - Rate My Interest

From the Skills Profile page, users can rate their interest with skills they possess and skills they want to develop. This process helps track your skill improvement over time and helps the system provide more personalized development recommendations and career advice.

To rate your interest in a skill, within the *Your Skills* or *Skills You Want to Develop* section of the Skills Profile page, select the menu icon on the right side of the skill button. Then, select **Rate My Interest**. *See Skills Profile.*

The General Instructions page explains the process. Select the **START** button to begin.

On the second page, select responses for the questions. Then, select the **SUBMIT** button to save the selected responses.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained.	Core Administration

Self Rating on Interest

GENERAL INSTRUCTIONS

Answer two quick questions so that you can track your skill improvement over time and get more personalized development recommendations and career advice. You'll rate how much you enjoy using it and how interested you are in developing that skill.

Results will be visible to

Jon Lolley

Start

×

tax

A tax is a financial charge or other levy imposed upon a taxpayer (an individual or legal entity) by a state or the functional equivalent of a state to fund various public expenditures. A failure to pay, or evasion of or resistance to taxation, is usually

Show More

Please rate how much you enjoy using: tax

Don't enjoy at all

Don't enjoy very much

Neutral

Somewhat enjoy

Enjoy very much

Please rate how interested you are in developing: tax

Not at all interested

Not very interested

Neutral

Somewhat interested

Very interested

Skills Profile - Request Feedback for Skill Proficiency

From the Skills Profile page, users can request that others provide feedback regarding their proficiency in a skill.

To access the Skills Profile page, go to HOME > UNIVERSAL PROFILE. Then, click the Skills tab.

To access another user's Universal Profile - Bio page, select the user's photograph from any page within Universal Profile or from Global Search. From there, you can access the user's Skills Profile page by clicking the Skills tab.

Users may be able to request feedback in the following areas:

o Skills Profile: Skills You Want to Develop - In the *Skills You Want to Develop* section of the Skills Profile, select the menu icon on the right side of the skill button. Then, select **Request Feedback**.
o Skills Profile: Your Skills - In the *Your Skills* section of the Skills Profile, select the menu icon on the right side of the skill button. Then, select **Request Feedback**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Request Feedback

Request skill ratings from people in your organization so that you can get a fuller picture on where you stand. You will be able reuse this same request later on to get additional ratings and track your improvement over time.

Select a format

⦿ Private Proficiency Rating

Request a Private Proficiency Rating

◯ Proficiency Ratings shared with your Manager

Request a Proficiency Rating

Visibility: Rater, You

Feedback Preferences

Select Skills

In an effort to promote engagement and responses, please limit selections to no more than {0} items.

🔍 Search for Capabilities

1 skills Selected

☑ finance

* Create a Request Name

Create a Request Name

This name is for your reference only and it will not be displayed to the people who receive the   0 / 100 request.

After you create the request, you will receive a personalized link that you can share with whomever you want to rate your skills.

Submit

Select Rating Format

Select one of the available format options. The selected format determines who can view the proficiency ratings that are provided.

Administrators can configure these rating templates in Capabilities Administration. *See* **Capability Rating Templates - Manage** on page 138 *for additional information.*

Select Skills

Select which skills you want included in the feedback request. At least one skill must be selected. The request recipients will be asked to provide ratings for each of the selected skills.

Create Request Name

Provide a name for the feedback request. This name is only for the reference of the requester, and it is never displayed to the request recipients. The character limit for this field is 100.

Submit and Copy Invite Link

Select the **SUBMIT** button to create the request. A pop-up opens and displays a URL to access the request. Select the **COPY LINK TO CLIPBOARD** button to copy the link. You can then share this link with desired recipients.
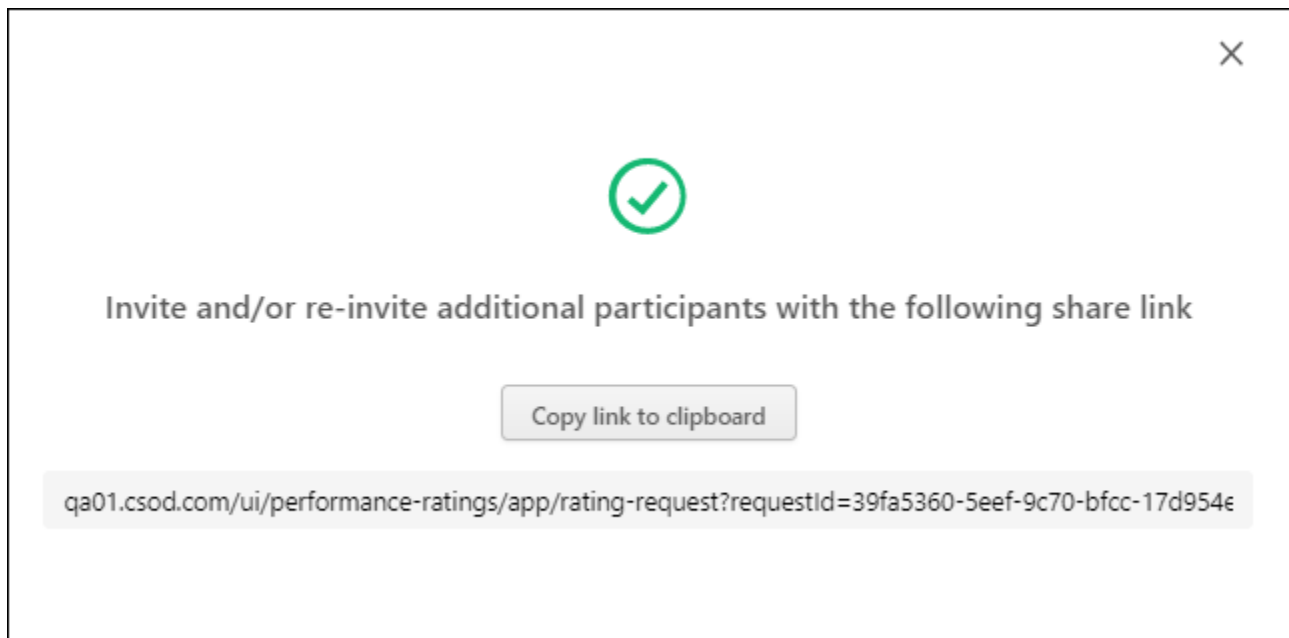
Skills Profile - My Rating Requests

Once a user has requested feedback for a skill, the user can view and track their requests from the My Rating Requests page.

To view the My Rating Requests page, go to HOME > UNIVERSAL PROFILE. Then, click the Skills tab. Then,

From the Skills Profile page, users may be able to view their request in the following areas:

o Skills Profile: Skills You Want to Develop - In the *Skills You Want to Develop* section of the Skills Profile, select the menu icon in the upper-right corner of the section. Then, select **My Requests**.
o Skills Profile: Your Skills - In the *Your Skills* section of the Skills Profile, select the menu icon in the upper-right corner of the section. Then, select **My Requests**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Requests List

The following information is listed for each existing rating request:

o Title
o Format - This displays the format that was selected when the request was created.
o Skills - This displays the number of skills that were included in the request.
o Responses - This displays the number of responses that have been submitted thus far.
o Last Modified
o Last Response

View Results

To view the results of a feedback request, select the View Results link. This link is only available if at least one response has been provided. This opens a pop-up with each of the responses listed with their ratings.

Get Sharable Link

To get a sharable link to invite or re-invite a user to provide feedback, select the menu icon on the right side of a request. Then, select **Get Sharable Link**. A pop-up opens and displays a URL to access the request. Select the **COPY LINK TO CLIPBOARD** button to copy the link. You can then share this link with desired recipients.

The shareable link generated for rating requests will be enhanced to include an SSO URL that directs users who are not logged in through your portal's SSO authentication before

opening the rating page. **Note:** *This functionality is not available in Stage and Pilot at the start of UAT.*

Skills Profile - Provide Skill Ratings

When a user creates a feedback request for a skill, a feedback request link is generated. This link can then be shared with others who can then enter the link in an Internet browser to access the ratings process.

When the link is opened, general instructions are displayed, and the page clearly indicates who will be able to view the ratings that are provided.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants a user the ability to view the Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission.	Core Administration

Select the **START** button to begin rating the user's proficiency in each skill.

Once all ratings have been provided, select the **SUBMIT** button. A confirmation pop-up is displayed.

STS Authentication End-Of-Life

Cornerstone's legacy authentication framework for APIs, Session Token Service (STS) is scheduled for end-of-life which will occur with the February '21 Release.

Cornerstone stopped supporting STS as of the February '20 release when STS authentication was deprecated and reached its end-of-service life. The STS endpoint is still available, but Cornerstone will not fix any defects or enhance this endpoint. End-of-life means the service will be taken down on that date.

No new STS Tokens may be generated after the February '21 release, and authorization requests may begin failing at any time. Customers, partners, and vendors MUST modify code for existing API integrations to use OAuth 2.0 as soon as possible.

OAuth 2.0 is an industry standard authentication and authorization protocol for APIs. Learn more about **Cornerstone's OAuth 2.0 - Client Credential Grant Flow**, which was generally available as of the August '19 Release and **OAuth 2.0 - Granular Scopes** which was available with the February '20 Release. This deprecation does NOT impact SOAP APIs. These will continue to use basic authentication like they do today. It also does NOT impact xAPIs at this time.

Considerations

The following are NOT currently impacted:

o xAPIs
o SOAP APIs

Updates to Conditions for Group Criteria

Updates to Conditions for Group Criteria

With this enhancement, when creating or editing a group, the *Group Criteria* section now includes the ability to select and define conditions tied to Employment Status, User Type, User Sub-Type, Rehired Employee, or Leave Type standard fields.

How Does this Enhancement Benefit My Organization?

This enhancement provides additional methods to identify groups of people for data management. It also allows organizations to be less reliant on the use of custom fields as a "workaround" for the lack of standard fields.

Implementation

This functionality is automatically enabled for all organizations.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
OU Group - Manage	Grants ability to create, copy, and update/edit custom groups of users without allowing ability to manage org units. This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
OU Group - Update	Grants access to edit existing custom groups of users. This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
OU Group - View	Grants access to view existing custom groups. This permission can be constrained by OU. This is an administrator permission.	Core Administration
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

Create/Edit Group - New Group Criteria Attribute Types

With this enhancement, when creating or editing a group, the *Group Criteria* section now includes the ability to select and define conditions tied to Employment Status, User Type, User Sub-Type, Rehired Employee, or Leave Type standard fields.

Groups can be created from the Administrator > Organizational Unit page and when setting availability for learning objects or tasks.

o To create a group from the Organizational Unit page, go to ADMIN > TOOLS > CORE FUNCTIONS > ORGANIZATIONAL UNITS > MANAGE ORGANIZATIONAL UNIT HIERARCHY. From the **Select Organizational Unit** drop-down list, select Group. Then, select the **Add Group** link.
o To create a group when setting availability, select the **Add New Group** link from the availability setting screen.

To edit a group from the Organizational Unit page, go to ADMIN > TOOLS > CORE FUNCTIONS > ORGANIZATIONAL UNITS. Click the **Manage Organizational Unit Hierarchy** link. From the **Select Organizational Unit** drop-down list, select Group. Then, select the Edit icon in the Options column.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
OU Group - Manage	Grants ability to create, copy, and update/edit custom groups of users without allowing ability to manage org units. This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
OU Group - Update	Grants access to edit existing custom groups of users. This permission can be constrained by OU, User's OU, and Provider. This is an administrator permission.	Core Administration
OU Group - View	Grants access to view existing custom groups. This permission can be constrained by OU. This is an administrator permission.	Core Administration
OU Hierarchy - Manage	Grants ability to create and update/edit organizational units. This permission grants access to all OU types, both standard and custom. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

Add Group Criteria

When creating a group, up to 50 criteria can be added, which can be any combination of AND or OR statements (e.g., 25 AND statements and 25 OR statements, 10 AND statements and 40 OR statements).

To add a new criterion, select the Add Criteria icon ➕ in the *Group Criteria* section.

Within the Select attribute pop-up, the following attribute types are now available:

- o Employment Status - ***Note:*** *"Employment Status" is currently titled as "User Status." There are plans to update the title to "Employment Status" to better reflect the actual field used but the exact date for this title change is yet to be determined.*
- o Leave Type
- o Rehired Employee
- o User Type
- o User Sub-Type

Workday Core Data Inbound Integration Enhancements

With this enhancement, the Workday Core Data Inbound Integration now includes additional validations and functionality to improve the overall customer experience.

This includes the following enhancements:

- o The system validates Override Field Mapping and Custom Field Mapping configurations; if invalid data is detected, an error message is displayed upon saving the Settings page, and an email notification is sent.
- o An email notification is sent when invalid organizational unit (OU) configuration/settings are detected at start of OU sync run.
- o If the User sync fails, the system automatically attempts to sync unprocessed user records in the next successful sync. This does not include user records that failed to sync due to a validation error, such as missing a required field.
  - o The email notification for the sync is enhanced with a Retried User row. This row details the number of user records that were retried and added, updated, or failed.
  - o The email log for the sync is enhanced with three new columns that are added between Status and Message:
    - o Record Sync Type - This indicates whether the user record is part of an original sync or a retry. If it is part of a retry, then "Retried User" is displayed. Otherwise, this is blank.
    - o Original Sync Date - For retried user records, this indicates the date and time at which the user record was originally attempted and failed to sync. The date-time is provided in UTC. For user records that are not being retried, this is blank.
    - o Original Request ID - For retried user records, this indicates the original request ID for which the user record was originally attempted and failed to sync. For user records that are not being retried, this is blank.

Implementation

This functionality is enabled by default for organizations using the Workday Core Data Inbound Integration in Edge.

Documentation and instructions will be updated in the Workday Core Data Inbound Integration tile in Edge upon release of the enhancements.

Cornerstone HR

e-days Absence Management Integration Enhancements

With this release, the e-days Absence Management Integration in Edge is updated to improve usability.

The following enhancements are now available:

o Absence Home dashboard on Universal Profile only displays entitlement Pot data
o Email subject line updated to include "ERROR" or "SUCCESS"

Absence Home dashboard on Universal Profile only displays entitlement Pot data

Prior to this enhancement, entitlement element data is displayed on the Absence Home dashboard in Universal Profile. Since most organizations disable entitlement elements in e-days, the data displayed was not always relevant.

With this enhancement, the Absence Home dashboard now displays entitlement Pot data and the info windows display the aggregate values of all active entitlements.

Old layout:
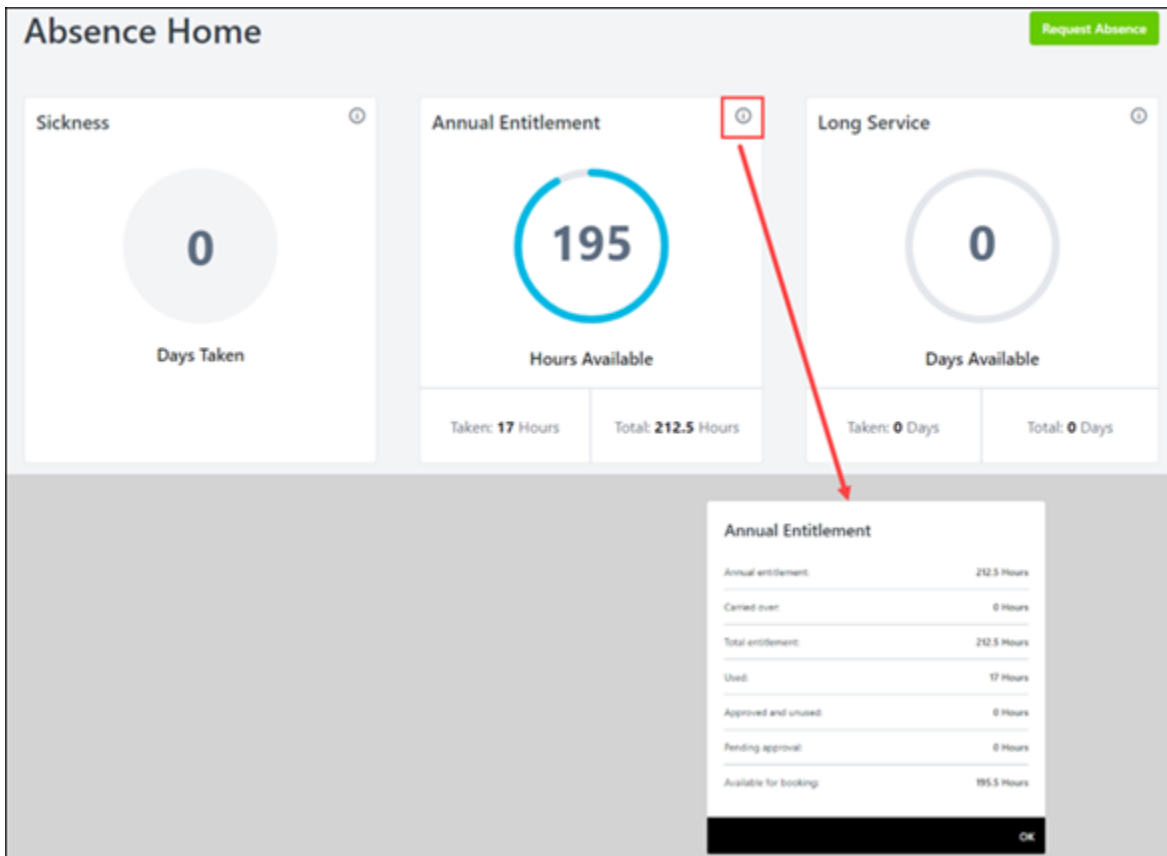
New layout:
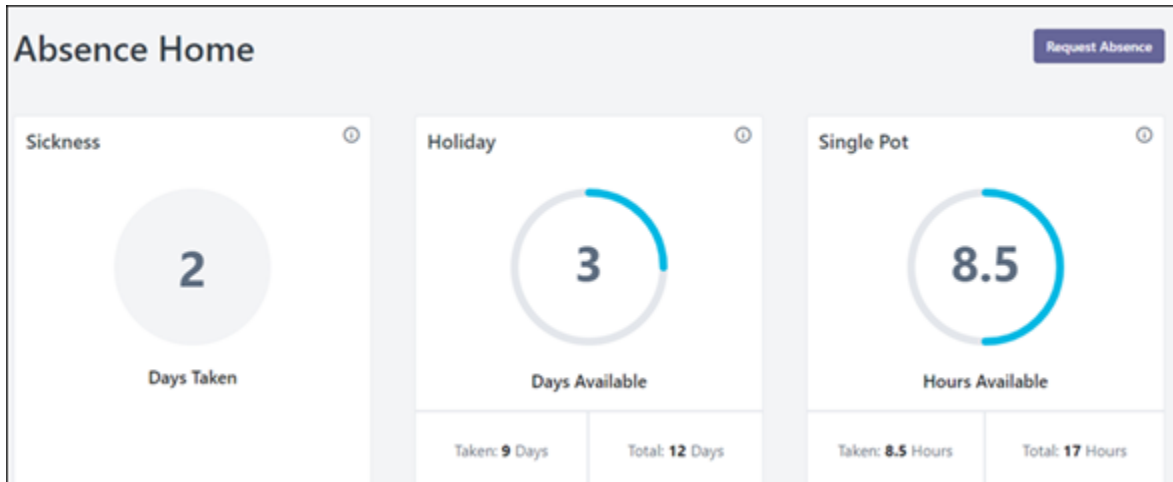
Email subject line updated to include "ERROR" or "SUCCESS"

Prior to this enhancement, the only way to tell if a sync is successful is to open and review the contents of the email.

With this enhancement, if the system is configured to send an email notification when an e-days sync is complete, the subject line of the email displays whether the sync is successful or has errors.

Implementation

o The e-days Absence Management Integration is only available to organizations using Cornerstone HR.

o Organizations must activate the e-days Absence Management Integration via the Edge Integrate Marketplace. *See Marketplace - Browse Edge Integrations.*

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

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

OU-Based Regex

Prior to this enhancement, Cornerstone HR (CHR) customers had the ability to configure regex validations per custom field to ensure field values match the required formats for data integrity and accuracy. Since employee data specifications & compliance requirements often vary across different regions and departments within the same region, customers with a global workforce had to create new custom fields for each variation.

With this release, organizations can define and configure multiple regex patterns based on OU values. This flexibility enables clients to setup a single custom field with data validation formats based on Division, Location, Legal Entity, or Cost Center OUs.

The following areas are affected by this enhancement:

o Custom field Administration - For Short text or Scrolling text user custom fields, clients can add up to 10 regex patterns and details.
o User record - When creating a new, or modifying an existing user record, an administrator can expand a category that has a custom field with regex validation and see a pattern example displayed under the custom field.
o Forms Administration - Users completing a form that contains a custom field with a regex pattern will see pattern example based on the user's existing OU values if the form includes OU values.
o My Account preferences - Users updating their My Account preferences that contains a custom field with regex pattern will see a pattern sample under the custom field.
o DLW Platform Load & Feed - If an employee record contains mapped custom fields with regex validations:
    o Validates data - If the custom field matches the regex pattern during validation, the load file is successfully validated.
    o Loads data - If the custom field matched the regex pattern, load file is successfully loaded.

How Does This Enhancement Benefit My Organization?

Organizations can view employee data in the appropriate data format even if it varies across different OUs.

Use Case

John is a system admin at the ACME corporation preparing to onboard 10 new employee in the Mumbai and London offices. He is aware that each location has different national identifiers with individual data formats that the organization must adhere to for accurate company payroll processing. John is looking for a way to setup multiple Regular Expression patterns for a single field to capture employee identification details for both offices.

Since National Identifier is not available as a standard field, John logs into the Cornerstone system, navigates to User Custom Field administration and creates a new custom field of type Short text. John creates a regex pattern for the Mumbai office setting the criteria as Location = Mumbai, specifies the data format for India's national identifier, and enters

details for all other fields for the pattern. John creates a similar regex pattern for the London office using the national identifier and details specific to that office.

In Mumbai and London, when the HR Business Partner is ready to onboard new employees and navigates to New User Record creation, the custom field 'National Identifier' displays sample data specific to the appropriate region to ensure that the correct information is entered.

Considerations

o Organizations can configure up to 10 OU-based regex patterns per User Custom field.
o Each custom field must have a default regex pattern as a fallback if User's OU values don't match any of the remaining OU criteria. For organizations that configured regex patterns for existing custom fields, the pattern is considered the default pattern which the administrator can change.
o Regex patterns are ranked in order to resolve any conflicts with employees that match multiple criteria.
o OU-based regex patterns:
    o Can be created for both Required or Secure custom fields of type Short text or Scrolling text.
    o Can only be created for Active custom fields with 'All Users' checked.
o OU-based regex configuration setup including creation, deletion and modification of regex patterns, are audited and can be provided on demand for an organization.
o Changes to OU values on the User Record triggers validations for matching regex patterns.

Implementation

o This functionality is available for Cornerstone HR customers using regex validations for User custom fields on the User Record.
o A one-time custom field meta information migration to AWS Aurora DB is performed for each organization. If an organization wants to disable OU-based regex or disable and then re-enable CHR in the future, custom field meta information migration to AWS Aurora DB must be re-performed.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Self-Registration and User Record Custom Fields - Manage	Grants access to manage custom fields for user Self Registration and the user record in Custom Field Administration. This permission can be constrained	Core Administratio n

	by OU and User's OU. This is an administrator permission.	
User Record Custom Field Configurable Validations - Manage	Grants ability to manage the configurable validations for user record custom fields within Custom Field Administration. This permission cannot be constrained. This is an administrator permission. This permission is only available to organizations that are using Cornerstone HR.	Core Administration
Required User Custom Fields - Manage	Grants the ability to manage the Required setting for user record custom fields. This permission cannot be constrained. This is an administrator permission. This permission is only available for organizations using Cornerstone for HR.	Core Administration
Users - Edit Secure User Custom Fields - Unmasked	Grants the ability to edit secure user custom field info unmasked. This permission can be constrained by OU, Restrict to User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - Manage Secure User Custom Fields	Grants the ability to manage the setting secure user custom fields. This permission can be restrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Masked	Grants the ability to view secure user custom field info masked. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Unmasked	Grants the ability to view secure user custom field info unmasked. This permission can be constrained by OU, User's OU, User Self and Subordinates,	Core Administration

| | User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission. | |

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Users - Manage OU Based Regex	Grants access to manage OU-based Regex patterns for user custom fields. This permission cannot be restrained. This is an administrator permission.	Core Administratio n

Learning

Adyen Payment Processor (Early Adopter)

Adyen Payment Gateway (Early Adopter)

Cornerstone's Extended Enterprise product was built on the Cybersource payment gateway, requiring organizations to solely use that service to accept payment for training sold via the Learning Management System (LMS). This has remained largely unchanged over time, with the exception of enabling PayPal as an additional payment processor.

With this Early Adopter enhancement, the new Adyen Payment Gateway payment processor is available for credit card payments. As this is an Early Adopter project, organizations may opt-in at will.

Starter Guide

Click here for the Adyen Payment Gateway Starter Guide!

Use Case

Symone is a system administrator for an EMEA organization. Her organization has been using the Cybersource payment gateway for several years, but would prefer to use Adyen as their payment vendor. First, Symone contacts Cornerstone Customer Support to have the Adyen Payment Gateway enabled in the portal, and then she contacts Adyen and creates an Adyen merchant account. During her account setup, she obtains a username, password, and an API key to enable Adyen for extended enterprise in her Stage portal. She then populates her organization's merchant account information in the Cornerstone portal, allowing her to test the functionality. Once satisfied the functionality works as expected, she generates this same information for her Production portal and configures the payment account. After setup, her users can seamlessly make purchases as they did before, but now all transactions are facilitated by Adyen instead of Cybersource.

Implementation

The following enablement steps are required for the Adyen Payment Gateway:

1. In order to use the Adyen Payment Gateway, an administrator must first contact Cornerstone Customer Support to enable the Adyen Payment Gateway in the Cornerstone system. This requires the administrator to open a support case.
2. The administrator must then configure a merchant account with Adyen. Once a merchant account is configured, the administrator can generate Adyen credentials, which are then used to configure the payment account in the Cornerstone portal. For information about creating an Adyen merchant account and generating API credentials please see the following documentation: **Adyen Help Documentation.** Direct contact with the Adyen sales team may be required for account creation. Cornerstone is not involved in this process. For any issues with the Adyen account setup process, please contact Adyen through the **Adyen Support Center**.
3. After obtaining API credentials from Adyen, the administrator must then define a payment account for Adyen in the Cornerstone system. *See* **Adyen Payment Gateway (Early Adopter) - Define Payment Account** on page 201 *for additional information.*

Administrators can test the Adyen Payment Gateway in a test portal if desired, but a separate set of Adyen credentials must be generated through Adyen's interface for use with the test portal.

No other changes, beyond the additional options available on the Define Payment Account page, have been made to Cornerstone's Extended Enterprise functionality as a result of this enhancement. The user's checkout experience will remain the same, except Adyen will be available as a payment method, if enabled.

Considerations

o   Costs are associated with the creation of an Adyen merchant account, and these fees are charged by Adyen. Cornerstone is not responsible for any costs incurred through Adyen. The enablement of the Adyen Payment Gateway within the Cornerstone system, however, has no associated costs.

o   The Cybersource Payment Gateway and the Adyen Payment Gateway cannot be enabled at the same time in the same portal. Enabling the Adyen Payment Gateway will disable the Cybersource Payment Gateway. The PayPal Payment Gateway, however, CAN be used in conjunction with either the Cybersource or Adyen Payment Gateways.

o   At this time, only credit card payments are supported through the Adyen Payment Gateway.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Payment Account - Modify	Grants ability to create payment profiles to determine the routing of users' payments. This permission cannot be constrained. This is an administrator permission.	eCommerce - Administration

Adyen Payment Gateway (Early Adopter) - Define Payment Account

On the Define Payment Account page, administrators can configure the payment account for their Adyen merchant account.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Payment Account - Modify	Grants ability to create payment profiles to determine the routing of users' payments. This permission cannot be constrained. This is an administrator permission.	eCommerce - Administration

Define Payment Gateway

To define the Adyen Payment Gateway, complete the following steps:

1. In the Define Payment Gateway section, select **Adyen** from the drop-down menu. ***Note:** This option is only available if Cornerstone Customer Support has enabled the Adyen Payment Gateway in your portal.*
2. In the Payment Gateway Information section, populate the following fields with the API credentials obtained from Adyen:
    A. **Merchant Account ID** - This is obtained from your Adyen account and displays on the API Credentials page in Adyen.
    B. **X-API-KEY** - This is the API key generated through Adyen. This must be copied at the time it is generated, as it will be obfuscated in the Adyen account after creation.
    C. **Username** - This is the username generated from within your Adyen account. ***Note:** This is NOT the username used to log into your Adyen account; it is a username associated with the API key when it is generated. This data will display on the details page for the merchant account.*
    D. **Password** - This is the password generated from within your Adyen account. ***Note:** This is not the password used to log into your Adyen account; it is a password associated with the API key it is generated.* This password must be copied at the time it is generated, as it will be obfuscated in the Adyen account after creation.
    E. **3D Secure** - This setting, if enabled, must also be configured in your Adyen account in order to function. Without first configuring this option in Adyen, errors will occur when attempting to perform transactions in the Cornerstone portal. This option should only be selected AFTER it has first been configured via Adyen.
3. Click the **SAVE** button to finish configuring the Adyen payment account. This account will then be available for users who meet the specified user criteria defined for the account. ***Note:** More than one account can be defined for the portal.*

For more information about generating API credentials, please see Adyen's documentation: **Adyen Help Documentation.**

For more information about creating a payment account: *See Create Payment Account.*

Cornerstone Learn - Mobile Security Enhancements

This enhancement includes the following features, which help improve the security of the Cornerstone Learn app and protect against potential attacks:

o Weak PIN detection, with a pop-up that prompts users to use a stronger PIN. Criteria that will flag a PIN as weak:
    o Less than three unique characters (e.g. PIN that uses only two numbers, such as 343344)
    o Using four numbers that are in subsequent order (e.g 1234XX or X1234X or XX4567)
    o Using four numbers in backwards subsequent order (e.g. XX4321 or 4321XX)
o 30 minute device lockout after five unsuccessful PIN attempts
o Encryption of information before storing to keychain (iOS only)

This enhancement was made available with the Dec 4 2020 patch.

Version Number

This functionality applies to iOS version 1.51 and Android version 2.1.2.166.

Implementation

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

Cornerstone Learn - UX Enhancements for Android

With this user experience (UX) enhancement, the Learn app has been updated to include the following features:

- o A circular user profile icon will be implemented in the upper right-hand corner of the top app bar, replacing the Search icon. Settings, Log Out, Forget Me, and QR Code functionality will reside under this new user profile.
- o The **Transcript**, **Downloads**, and **Approvals** links will be migrated from the navigation drawer to tappable icons within a fixed bottom navigation bar. Additionally, this bottom navigation bar will contain a Home icon and a Search icon, allowing all the main Learn app features to be easily accessible from any app page with a single tap.
- o The navigation drawer will be renamed "Links," and repositioned to the right side of the top app bar. It will continue to house any configured custom links, as well as the **Give Feedback** link.

This enhancement was made available with the Dec 4 2020 patch.

Implementation

This functionality is automatically available to Android users of the Cornerstone Learn app with the Dec 4 patch. If the apps on a user's device are configured to auto-update, no action is required from the user in order to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from the Google Play store.

Version Number

This functionality applies to Android version 2.1.2.166.

User Profile

The user profile icon displays in the upper-right corner of the top app bar. Tapping the user profile icon opens the Profile page, where various settings and options can be accessed by the user.

On the Profile page, the user can access the following features:

- o **Settings** - The user can tap this option to adjust their Learn app settings.
- o **Scan QR Code** - The user can tap this option to access their QR code when attending a training session that uses QR codes for attendance tracking.
- o **Forget Me** - The user can tap this option to reregister their Learn app account from their device. Any downloaded courses and user data associated with the app will be removed.
- o **Log Out** - The user can tap this option to log out of the Learn app on their device.

Links

Any custom links configured by the user's organization, as well as the **Give Feedback** link, can be accessed by tapping the **Links** link in the upper-right corner of the top app bar.
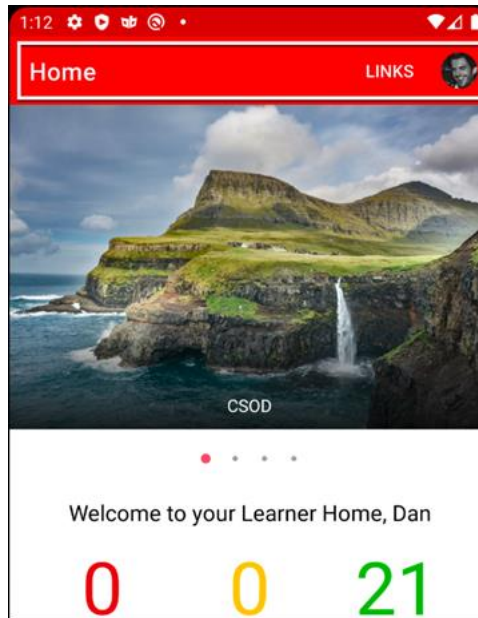
Bottom Navigation Bar

A fixed navigation bar is available at the bottom of all pages of the Learn app. The navigation bar includes the following icons, if available to the user:

o **Home** - The user can tap this icon to navigate to the home screen.
o **Search** - The user can tap this icon to access Learning Search, through which they can search for training.
o **Transcript** - The user can tap this icon to access their Learning transcript page.
o **Downloads** - The user can tap this icon to view their downloaded courses.
o **Approvals** - 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.
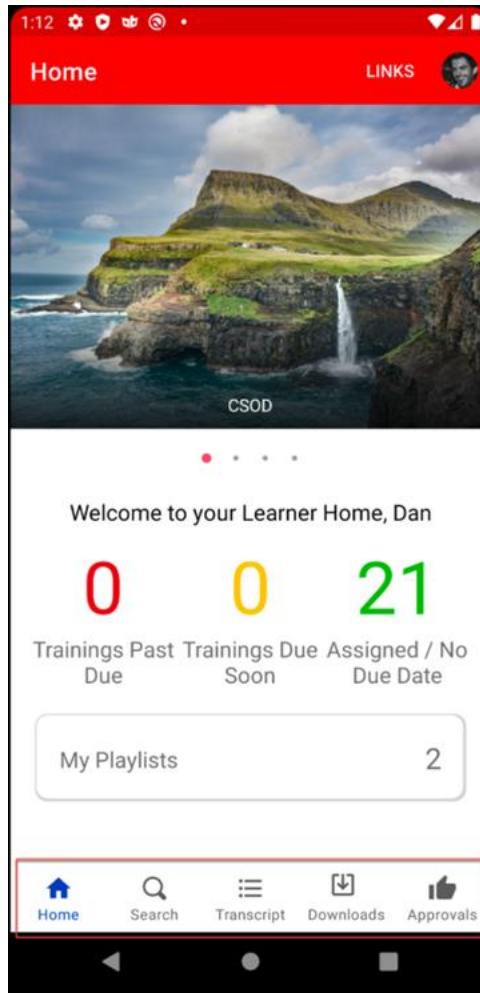
Cornerstone Learn - UX Enhancements for iOS

With this user experience (UX) enhancement, the Learn app has been updated to include the following features:

o A user profile icon will be implemented in the upper right-hand corner of the top app bar, replacing the Search icon. Settings, Log Out, Forget Me, and QR Code functionality will reside under this new user profile.
o The Search icon will be migrated to the second position of the bottom navigation bar.
o Formerly a fixture of the bottom navigation bar, Settings will be migrated to the newly added user profile. It will exist as a link, and when the link is tapped, it will display all Learn app settings.

This enhancement was made available with the Dec 4 2020 patch.

Implementation

This functionality is automatically available to iOS users of the Cornerstone Learn app with the Dec 4 patch. If the apps on a user's device are configured to auto-update, no action is required from the user in order to receive this functionality. If the apps on a user's device are not configured to auto-update, the user must download the latest version of the app from the Apple store.

Version Number

This functionality applies to iOS version 1.51.

User Profile

The user profile icon displays in the upper-right corner of the app. Tapping the user profile icon opens the Profile page, where various settings and options can be accessed by the user.

On the Profile page, the user can access the following features:

- o **Settings** - The user can tap this option to adjust their Learn app settings.
- o **Scan QR Code** - The user can tap this option to access their QR code when attending a training session that uses QR codes for attendance tracking.
- o **Forget Me** - The user can tap this option to reregister their Learn app account from their device. Any downloaded courses and user data associated with the app will be removed.
- o **Log Out** - The user can tap this option to log out of the Learn app on their device.

Search

The Search feature has been migrated to the second position of the bottom navigation bar of the app. Users can tap the Search icon to search for training.
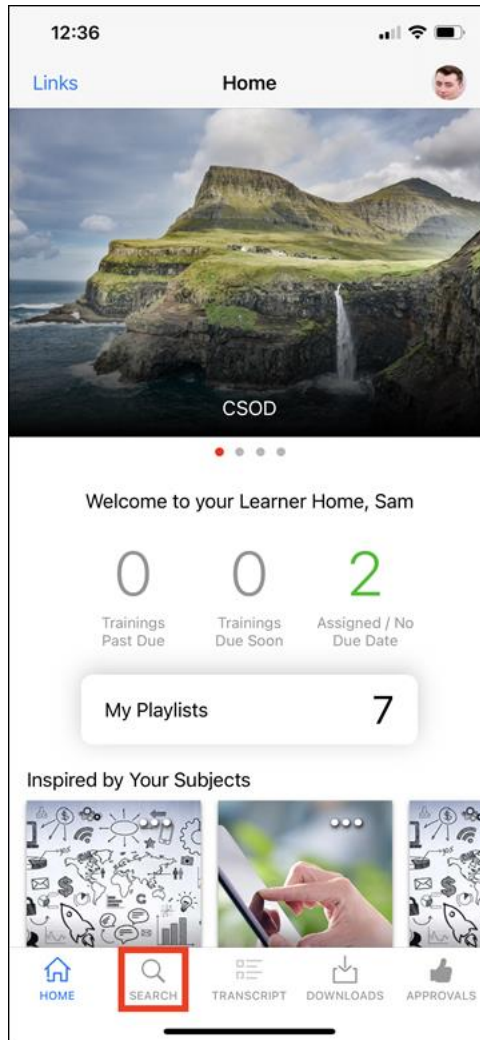
Curriculum Player Checkbox Selected by Default

Curriculum Player Checkbox Selected by Default - Overview

The Curriculum Player allows users to launch and complete training within a curriculum using a modern and intuitive user interface. The Curriculum Player guides users through the curriculum sections and allows users to track their progress. Administrators have the option of enabling the Curriculum Player experience for users during the curriculum creation process.

Prior to this enhancement, the **Curriculum Player** option available during the curriculum creation process was NOT selected by default. To enable this option for a curriculum, the administrator was required to select the checkbox for it.

With this enhancement, the **Curriculum Player** option available during the curriculum creation process IS selected by default. This means the Curriculum Player experience will be enabled for all curricula created after the February 2021 release unless the administrator deselects the checkbox next to the **Curriculum Player** option. Enabling the Curriculum Player by default makes it easier for organizations to deliver a superior learning experience to users consuming curricula in the system.

Implementation

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

Considerations

This enhancement is not retroactive. Curricula created prior to the February 2021 release are not impacted.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Admin - Manage	Grants ability to create new and edit/update existing curricula. This permission can be constrained by OU, User's OU, 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. ***Tip:*** *Do not constrain this permission to your entire corporation; it can cause long page load times and timeout errors. Applying this constraint is functionally the same as leaving the permission unconstrained, but omitting this constraint does not cause the system to do the unnecessary constraint checks as in the former scenario.*	Learning - Administration

Curriculum Player Options	Grants ability to enable Curriculum Player feature via the General step when creating or editing a curriculum. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Create Curriculum - Curricula Player

The Curriculum Player option displays on the General step of the curriculum creation process.

To create a curriculum, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CURRICULA. Then, click the **Create a New Curriculum** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Admin - Manage	Grants ability to create new and edit/update existing curricula. This permission can be constrained by OU, User's OU, 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. *Tip: Do not constrain this permission to your entire corporation; it can cause long page load times and timeout errors. Applying this constraint is functionally the same as leaving the permission unconstrained, but omitting this constraint does not cause the system to do the unnecessary constraint checks as in the former scenario.*	Learning - Administration
Curriculum Player Options	Grants ability to enable Curriculum Player feature via the General step when creating or editing a curriculum. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

Curriculum Player Enabled by Default

The **Curriculum Player** option is selected by default for all curricula created following the February 2021 release. The **Hide Overall and Section Progress** option, which appears when the Curriculum Player option is selected, will continue to NOT be selected by default.

The administrator can disable the Curriculum Player for any curriculum by deselecting the **Curriculum Player** checkbox.

Deprecation of Browse for Training

Cornerstone offers two learning discovery experiences: Learner Home and Browse for Training. Browse for Training is Cornerstone's legacy learning discovery experience. Browse for Training was previously scheduled for deprecation in 2021.

However, the Product team recognizes that there are still feature areas that need to be addressed prior to the deprecation of Browse for Training. Therefore, the deprecation of Browse for Training has been postponed. The new deprecation date is not yet determined, but will **not** occur in 2021. Once a new date is determined, organizations will have three release cycles before the deprecation to manage any change management needs.

Deprecation Guide

Click here for the Browse for Training Deprecation Guide.

Feature Parity Considerations

Some features offered through Browse for Training do not have direct equivalents to Learner Home or Learning Search. See below for information about exclusions:
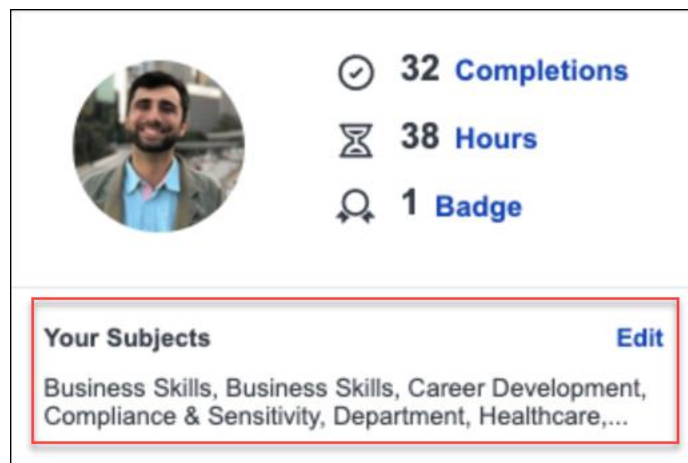
Pricing

Pricing information was available for training on the Browse for Training page, but pricing information is not available for training on Learner Home or Learning Search. However, pricing information can be viewed for any training item via the Learning Details page for the item. To access the Learning Details page for a training item, click the item's title from the Learner Home or Learning Search page.

Note: *Pricing is NOT scheduled to be added to the Learner Home and Learning Search pages.*

Subject Hierarchy

It was possible for users to browse their system's subject hierarchy on the Browse for Training page. On the Learner Home page, users can browse the system's available subjects and add subjects they are interested in via the Your Subjects section , allowing them to easily browse training associated with their chosen subjects.

Sort By

The Browse for Training page includes a Sort By menu which allows users to sort training items by title, most recent, popularity, and more. The Learner Home page and Learning Search page do not currently offer this functionality. However, sorting functionality is planned as a future enhancement for Learning Search.

Location

The Browse for Training page includes a **Location** filter, which allows users to filter events and sessions by location. This used filter is not available via Learner Home or Learning Search.

Note: *The* **Location** *filter is NOT scheduled to be added to the Learner Home and Learning Search pages, due to lack of use of this feature.*

Date Range

The Browse for Training page includes a **Date Range** filter, which allows users to filter events and sessions by a selected date range. This filter is not available via Learner Home or Learning Search.

Note: *The* **Date Range** *filter is rarely utilized, but is under consideration as a possible future enhancement to Learning Search.*

Deprecation of Learning Loads for Data Load Wizard (DLW) with the February '22 Release

Ability to perform learning data loads using Data Load Wizard will be deprecated with and end-of-life in the February '22 Release. End-of-support will occur in 2022, and support for defects related to the DLW learning loads will stop at this time. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

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

Existing organizations that are ready to migrate to Edge Import can enable it in the Edge Marketplace and review the migration and starter guides to help them through the migration steps. All organizations are required to complete their migrations before the February '22 Release which will be the end-of-life date for DLW learning data loads.

Deprecation of Legacy Learning Details Page with the February '21 Release

In 2019, a redesigned Learning Details page was made available as an Early Adopter project, and has continued to evolve toward feature parity with the legacy version of the Learning Details page. With the February 2021 release, the legacy version of the Learning Details page, previously referred to as "Training Details" or "LO Details," will be deprecated for training types which are supported by the redesigned Learning Details page, including:

- o Curricula
- o External Content
- o Materials
- o Online Courses
- o Tests
- o Videos
- o Events & Sessions

With the February 2021 release, all portals will be automatically upgraded to the new Learning Details page for all supported training types. Portals using a customized version of the legacy Learning Details page will be impacted by this enhancement, but the redesigned Learning Details page can be customized in the same way.

For more information about the new Learning Details page: *See Learning Details Page (Early Adopter).*

Considerations

The legacy Learning Details page will no longer be supported or enhanced for the training types supported by the new Learning Details page.

The legacy Learning Details page will continue to be supported for the following training types:

- o Certifications
- o Cohorts
- o Programs
- o Postings

Deprecation of Proxy Enrollment API with the February '21 Release

Cornerstone's legacy Proxy Enrollment API, available as part of Cornerstone API, is being replaced by the new Learning Assignment API. The Proxy Enrollment API end-of-life deprecation will 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.

Cornerstone will no longer address defects reported with the Proxy Enrollment API, and no enhancements will be made to the API. 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.

eeds - Continuing Medical Education Integration

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

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

The eeds integration tile was made visible in Edge on December 21, 2020.

Use Case

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

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

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

Exclusions

The following exceptions apply to the eeds integration:

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

Implementation

For organizations using the Learning module, the eeds integration is available for an additional cost. To get started, access the Edge Marketplace by going to ADMIN > TOOLS > EDGE and clicking the **Marketplace** link.

Search for and select the eeds - Continuing Medical Education informational tile available in the Edge Marketplace and review the Vendor, Integration, and Setup tabs for the integration. When ready to proceed, click the **GET STARTED** button for the integration.

After you complete and submit the form, an eeds expert will contact you with pricing and setup steps.

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 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
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Express Class - Manage	Grants the ability to create and add users to an Express Class for a facilitated training session. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. This is an end user permission.	Learning - Administration

Materials Management	Grants ability to view the Material Administration page and create, edit, and copy materials. Once created, these "materials" can be managed like other learning objects via the course catalog. This permission can be constrained by OU, User's OU, and Provider. The constraints on this permission determine which materials the administrator is able to view, edit, copy, and create. This is an administrator permission.	Learning - Administration
Training Custom Fields	Grants ability to create and edit custom fields to be used for one or more learning object types. This is an administrator permission.	Learning - Administration

Grovo and Create Tool Content Player 508/WCAG Compliance Enhancements

Digital accessibility promotes usability for users with physical, visual, or auditory impairments. With the February '21 Release, the Grovo content player is now compliant to a WCAG 2.1 AA standard for accessibility, with minor exceptions for usage of third-party libraries outside of Cornerstone's control. When possible, impaired users are offered alternatives and workarounds to provide the best viewing experience of course content.

The following enhancements are not noticeable to most end users, but will help facilitate an improved experience for users with visual impairments:

- o Higher color contrast ratios have been added to navigation buttons
- o ARIA labels are included on interactive elements
- o All content may be viewed at high magnification levels

This functionality is not available at the start of UAT.

Starter Guide
Click here to access the Grovo Create Tool Starter Guide!

Implementation
This functionality is automatically enabled for all portals using the Create Tool to create and provide users with content.

Considerations
These features do not guarantee that custom content generated by administrators will be 508/WCAG compliant. Create Tool users must leverage the accessibility-focused features, such as closed captioning upload and alt text input to increase the usability of their custom course content.

IE7 and IE8 Compatibility Modes Deprecation with the February '21 Release and jQuery Upgrade for Course Launching

IE7 and IE8 Compatibility Modes Deprecation with the Feb '21 Release and JQuery Upgrade for Course Launching

During the August '20 Release, Cornerstone upgraded jQuery from v1.7 to v3.4.1 to enhance security and resolve known vulnerabilities. As part of this enhancement, Compatibility Mode for IE7 and IE8 is being deprecated.

o With the October 2020 release, jQuery was automatically upgraded to v3.4.1 in Stage and Pilot portals. Options for IE7 and IE8 were removed.
o With the February 2021 release, jQuery will be automatically upgraded to v3.4.1 in Production portals. The functionality will be deprecated completely, meaning that courses with IE7 and IE8 Compatibility Mode will be migrated to a "None" value.

After the upgrade has been activated:

o The jQuery version will be upgraded to v3.4.1 for course launching
o IE7 and IE8 options for the **Compatibility Mode** field in the Course Catalog and on the Content Launching Preferences page will be removed
o Courses that are associated with IE7 or IE8 compatibility mode are migrated to compatibility mode value of "None"
o Compatibility mode for new courses will be set to "None" by default

Assessing Your Impact

For information about assessing the impact of this upgrade on your system, see: **Potential Impact Assessment**

For additional help, please see the following resources:

o Knowledge Article - **IE7 & IE8 Compatibility Mode Deprecation: jQuery Upgrade for Course Launching**
o Deprecation Guide - **IE7 & IE8 Compatibility Mode Deprecation: jQuery Upgrade for Course Launching**

Deprecation Guide

Click here to access the IE7 & IE8 Compatibility Mode Deprecation Guide!

Use Case

Iesha is a Learning administrator who is responsible for managing content for her organization. To ensure the company's portal is utilizing the latest security protection, Iesha wants to upgrade the jQuery library for course launching. Upgrading the jQuery library from v1.7 to v3.4.1 ensures the portal is not subject to a known security hazard. Iesha also wants to test courses that are using legacy jQuery library and to assess what will be the impact of the company's course catalog so he could contact his content provider for issues that may pop up due to the upgrade and the deprecation of Compatibility Mode.

Considerations

What courses may be impacted by the jQuery upgrade to v3.4.1?

- o Courses with IE7 or IE8 Compatibility
- o Courses with an empty value, only if the default Content Launching preference is set to IE7 or IE8 compatibility mode

Implementation

The **Activate jQuery v3.4.1 for Course Launching** option is automatically available on the Learning Feature Activation Preferences page in all portals using the Learning module. *See Feature Activation Preferences - Upgrade jQuery.*

Permissions

The following existing permission applies to this functionality:

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 - Administratio n

IE7 and IE8 Compatibility - FAQ

Please see the list of commonly asked questions and answers below:

Q: The default compatibility mode in my portal is different than IE7 and IE8. Will my portal be impacted?

A: All courses that are defined with IE7 or IE8 compatibility may be impacted. Courses that have an empty value on the report (i.e. no compatibility was defined for the course) are not impacted if the default is not IE7 or IE8 compatibility.

Q: What should I do if I need to upgrade my course?

A: Please work directly with your content provider, course developer, or a third-party to upgrade your courses and additional support.

Q: What should I do if I notice functionality issues with Cornerstone-provided courses?

 A: If you have purchased courses directly from Cornerstone, please contact Customer Support. Follow these case creation guidelines when opening a case: **Case Creation Guidelines**

Launch vILT Session via Email

If an administrator has configured the ILT Session Register email via Email Administration, when learners register for training, they receive an email with details about the time and date of the training, along with a link to withdraw from the session if necessary.

With this enhancement, a new LAUNCH.SESSION.LINK tag is available when configuring the ILT Session Register email. This new tag, when incorporated into the body of the ILT Session Register email, provides email recipients with a customized link which allows them to immediately launch the virtual session by clicking the link.

To access Email Administration, go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT. To configure a template for the ILT Session Register email, search for the ILT Session Register email type and click the Add Email next to it.

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

Launch Session Link Tag

To include a link that users can click to launch their virtual session in the ILT Session Register email, the administrator can add the LAUNCH.SESSION.LINK tag to the body of the email. A functional link will replace the tag when users view the email. This email tag functions for both single and multi-part sessions.

Learning Assessments (Open Beta) Enhancements

Learning Assessments (Beta) Enhancements - Overview

Learning Assessments are a reimagining of the legacy Test Engine experience. The first phase of this multi-release project was introduced with the February '20 Release and focused on the administrator experience, with emphasis on assessment creation and assessment preview. The August '20 and October '20 releases added additional functionality to the open beta, in Stage environments only, by focusing on the end user experience, the publishing workflow, assignment of assessments, and a simple version of the Attempts Review Page.

With the upcoming February '21 release, the expansion of the Learning Assessments open beta continues with the addition of the following features:

o   Assessment completion reporting capabilities
o   New security permission
o   New navigation bar and filters available during the user's assessment completion process

Learning Assessment functionality is currently only available in Stage portals.

Exclusions

Because the Learning Assessments project remains in an open beta status, this functionality continues to only be available in Stage portals, and the following features included in the legacy Test Engine experience are NOT currently supported for Learning Assessments:

o   Reporting beyond assessment completion, such as a timing report, item analysis, and Reporting 2.0 features
o   Dynamic assignment
o   Inclusion of assessments in curricula
o   Using assessments as pre-work or post-work
o   Transcript actions beyond launching and reviewing
o   Versioning
o   Localization
o   Images within assessments
o   Essay question type
o   Essay grading and the grader workflow
o   Subject association
o   Question categories
o   Question bank
o   Migration tools
o   Bulk upload tools
o   Bulk actions

The above list is not a fully comprehensive list of exclusions. Any feature not listed as available for assessments is not currently supported.

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. ***Note:*** *Learning Assessments functionality and Test Engine functionality can currently both be active in the portal at the same time.*

With the February 2021 release, the new permission for managing learning assessments is required for administrators to access Learning Assessments functionality. This new permission is automatically given to any user with the permission to manage the Test Engine.

For more information about earlier phases of this beta project, released in February 2020, August 2020, and October 2020, please see the below documentation:

o Learning Assessments Beta Overview - *See Learning Assessments - Admin Experience (Open Beta) - Overview.*
o Assessments Home - *See Assessments Home.*
o Create Assessments - *See Create Assessments.*
o End User Experience of Assessments - *See Assessments - End User Experience - Overview.*
o Assigning Assessments - *See Learning Assessments (Open Beta) - Learning Assignment Tool.*

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assessments - Manage	Grants access to Learning Assessments (Beta) functionality, which allows administrators to create, edit, publish, and delete assessments in Stage portals only. This permission also allows administrators to delete users' assessment attempts. 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

Learning Assessments - Navigation Panel

With this enhancement, a navigation panel is available during the user's assessment-taking process, allowing users to easily navigate the assessment sections and questions, and filter for unanswered questions.

To test the experience of an assessment, go to: ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Learning Assessments BETA** link. Find the assessment you want to take and click the **Launch** link next to it. Accessing an assessment in this manner requires the administrator to have the *Assessments - Manage* permission.

Assessments are also accessible from the user's transcript if the user has been assigned the assessment via the Learning Assignment Tool (LAT). No permissions are required to access an assessment in this manner. For information about assigning an assessment using the LAT: *See Learning Assessments (Open Beta) - Learning Assignment Tool.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assessments - Manage	Grants access to Learning Assessments (Beta) functionality, which allows administrators to create, edit, publish, and delete assessments in Stage portals only. This permission also allows administrators to delete users' assessment attempts. 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

Navigation Panel

The Assessment Player navigation panel is available on the left side of the screen for both desktop and mobile devices. For desktop devices, the panel is open by default and can be collapsed using the Collapse icon. For mobile devices, the panel is collapsed by default and can be opened by tapping the menu icon in the upper-left corner of the screen. ***Note:** The navigation panel cannot be disabled by the administrator.*
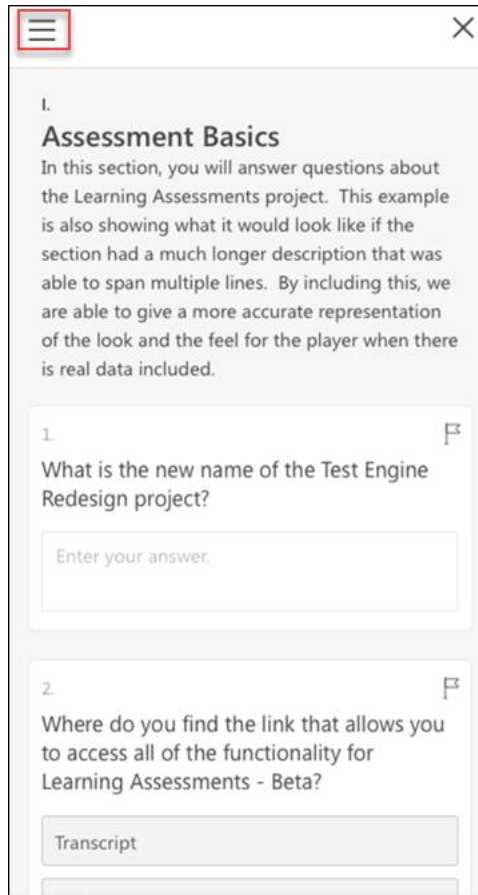
Filters

The following filters are available at the top of the navigation panel **while taking the assessment**:

- o **All** - This filter always displays
- o **Unanswered** - This filter only displays when there are unanswered questions in the assessment
- o **Answered** - This filter only displays when there are answered questions in the assessment
- o **Flagged** - This filter only displays if the user has flagged at least one question in the assessment

The following filters are available at the top of the navigation panel when reviewing the assessment:

The following filters are available at the top of the navigation panel **when reviewing an assessment**:

- o **All** - This filter always displays.
- o **Unanswered** - This filter only displays when there are unanswered questions in the assessment.
- o **Correct** - This filter only displays if at least one question was answered correctly.

- o **Incorrect** - This filter only displays if at least one question was answered incorrectly.
- o **Flagged** - This filter only displays if the user has flagged at least one question in the assessment.

To the right of each filter, the number of questions that meet the filter criteria displays in parentheses.

When a filter is selected, only questions meeting the criteria of that filter will display in the lower section of the navigation panel, allowing users to quickly navigate to questions which meet their selected filter criteria. The navigation panel filters operate using "OR" logic, meaning that if, for example, the **Unanswered** and the **Flagged** filter are both selected, any questions that are either unanswered OR flagged will display in the lower section of the navigation panel. ***Note:*** *Regardless of any filters applied, all question types always display in the main viewing area of the Assessment Player. The filters only impact which questions display in the navigation panel.*

Sections and Questions

Below the available filters, any questions that meet the selected filter criteria display, organized within their corresponding assessment sections. Each section displays with its name and order number, and sections are collapsed by default. Clicking the section tile expands the section and reveals the questions within the section that match the user's selected filter criteria.

Each question displays in its associate section with their order number and a preview of the question text. Icons display to the right of each question, indicating the question's current status. When taking an assessment, the status icons include:

- o **Empty Circle** - Indicates the question is currently unanswered
- o **Filled Circle** - Indicates the question has been answered
- o **Flag** - Indicates the user has flagged the question for review

Clicking a question navigates the user to that question in the main Assessment Player area, allowing the user to take action on the question.

Mobile View of Navigation Panel

The navigation panel is also available for users accessing the Assessment Player from a mobile device, but the panel is collapsed by default. The user can open the panel by tapping the menu icon in the upper-left corner of the screen.

All

Not Answered   (10) ○

I.   **Assessment Basics**

1.   What is the new name of the Test   ○
     Engine Redesign project?

2.   Where do you find the link that   ○
     allows you to access all of the
     funtionality for Learning...

3.   Assessments can only be accessed   ○
     on stage portals.

4.   Which question types are currently   ○
     supported in the Learning
     Assessments Beta?

II. **Advanced Assessments**

III. **Assessment Exclusions**

Learning Assessments - Completion Reporting

With this enhancement, learning assessment completion data is included in both Custom Reports and Reporting 2.0.

The following assessment data is included in learning object (LO) completion reporting:

o Assessment LO status
o Assessment LO score

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Create Report

Administrators can access this information by creating a report with the following fields:

o **Assignment Training Title** - This field should be used as the criteria for creating the report and should be set to the name of the assessment they want the report on.
o **User First and Last Name** - This is the name of the user who took the assessment.
o **Transcript Status** - This is the current status of the assessment LO on the transcript.
o **Transcript Score** - This is the score associated with the assessment. This field will be blank if the assessment is not in a Completed or Failed status.
o **Passed** - This field indicates whether the user received a passing score for the assessment, using a Yes/No value. ***Note:*** *Unscored assessments receive a Yes value.*

These are the only fields supported for assessments at this time. Additional assessment reporting capabilities will be added in future releases.

Learning Details Enhancements

Learning Details Enhancements - Overview

In 2019, a redesigned Learning Details page was released as an Early Adopter enhancement. As of the August 2020 release, the Learning Details page was removed from Early Adopter status and became generally available. All portals were auto-upgraded to the redesigned Learning Details page, though administrators could still disable the page manually for supported training types.

With the February 2021 release, any portals not yet using the redesigned Learning Details page are auto-upgraded to the new Learning Details page for all supported training types, and administrators no longer have the ability to disable the Learning Details page manually. Note: An exception to this auto-upgrade is that Extended Enterprise users accessing the Learning Details page through anonymous browsing will still see the legacy Learning Details page instead of the new Learning Details page, despite the auto-upgrade.

In addition, the following enhancements have been made to the redesigned Learning Details page:

o Event prices now display on the Learning Details page - *See* **Learning Details - Event Price Display** on page 247 *for additional information.*
o Session custom fields can be viewed from the Session flyout of the Learning Details page - *See* **Learning Details - Session Custom Fields** on page 248 *for additional information.*
o Improved transcript messaging - *See* **Learning Details - Improved Transcript Messaging** on page 249 *for additional information.*
o Improvements for training with recurrence - *See* **Learning Details - Training with Recurrence** on page 250 *for additional information.*
o Inventory can be purchased for other users via the Learning Details page - *See* **Learning Details - Inventory Purchase** on page 251 *for additional information.*
o Post-work behavior correction - *See* **Learning Details - Post-work Behavior Correction** on page 252 *for additional information.*
o Ratings and reviews can be deleted - *See* **Learning Details - Delete Ratings and Reviews** on page 253 *for additional information.*

Considerations

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

o Curricula
o Events and Sessions
o External Content
o Materials
o Online Content
o Online Courses
o Tests
o Videos

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

- o Certifications
- o Cohorts
- o Forms
- o Libraries
- o Observation Checklists
- o Postings
- o Quick Courses

Exclusions and Considerations

The following Learning Details exclusions apply to ALL supported training types:

- o Anonymous Browsing for EXE users is not yet supported. This means that any configured self-registration workflows will continue to direct to the legacy Learning Details page. ***Note:*** *Due to this, EXE users accessing the Learning Details page through anonymous browsing will still see the legacy Learning Details page instead of the new Learning Details page, despite the auto-upgrade.*
- o No training types can be added to a Training Plan via the Learning Details page

The following Learning Details exclusions apply to VIDEO training items only:

- o Video preview functionality is not supported

The following Learning Details exclusions apply to CURRICULUM training items only:

- o Child training description, price, and transcript status are not supported on the Learning Details page
- o Display of sections, beyond one level of nesting, are not supported.

The following Learning Details considerations apply to EVENTS and SESSIONS only:

- o Session Details - Session details are found in the Session flyout when the **View Details** link is clicked for a session
- o Sessions Display - The Upcoming Sessions list for an event now displays all sessions available to the user. The ability to view sessions that are not available to the user is not supported.
- o Roster access for learners is not supported on the Learning Details page. This can be accessed instead via Transcript Details.
- o Map view is not supported on the Learning Details page.
- o **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
- o 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

Implementation

All portals using the Learning module are automatically upgraded to the redesigned Learning Details page for all supported training types. As of the Feb 2021 release, this upgrade cannot be reversed or disabled.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Reviews and Ratings - Manage	Grants ability to delete other users' reviews/ratings. This is an administrator permission.	eCommerce - Administration
Inventory - Manage	Grants ability to purchase multiple learning object licenses with the intent to assign that training to other users at a later time. This permission can be constrained by OU and User's OU.	eCommerce
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

Learning Details - Auto Upgrade

With the Feb 2021 release, all portals are upgraded to the new Learning Details page for all supported training types. All users will see the new Learning Details page for all supported training types, and the Learning Details Enablement Preferences page has been disabled and can no longer be accessed by administrators. This means it is no longer possible for administrators to manually disable the redesigned Learning Details page.

 Note: For now, Extended Enterprise users accessing the Learning Details page through anonymous browsing will still see the legacy Learning Details page instead of the new Learning Details page, despite the auto-upgrade.

Learning Details - Event Price Display

With this enhancement, even when no sessions are currently scheduled for an event, the event price displays on the Learning Details page, if a price has been configured for the event.

Event prices are set via the Manage Events and Sessions page, and pricing display on the Learning Details page can be configured by an administrator via the Learning Details Preferences page. *See Learning Details Preferences.*

Note: *When a user views the Learning Details page for an event, the event may have several available sessions. If these sessions have different prices, the Event Price text will state, "Session Price Varies" instead of an actual event price.*

Learning Details - Session Custom Fields

Administrators can configure custom fields at the session level, and with this enhancement, these custom fields are now accessible to users on the Learning Details Session flyout after the user clicks the **Show More** link. These custom fields are configured by an administrator via the Manage Events and Sessions page. The visibility of custom fields for all training types is controlled from the Learning Details Preferences page and the Custom Fields Administration page.

For more information about controlling the visibility of custom fields on the Learning Details page for all supported training types: *See Learning Details Preferences.*
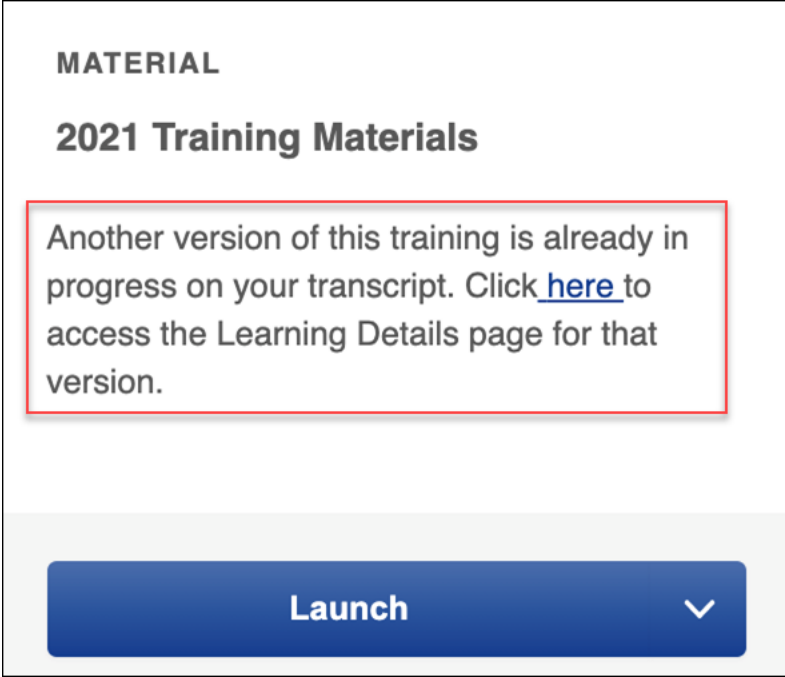
Learning Details - Improved Transcript Messaging

With this enhancement, if learners have an older version of a training item on their transcript and they view the Learning Details page for any new version of the item, they will now see a link to the Learning Details page of the training version from their transcript, allowing them to view information about the old version and access any available actions.

If an older version of a training item is already available on the learner's transcript, a message stating, "Another version of this training is already in progress on your transcript. Click here to access the Learning Details page for that version," displays above the primary action button on the Learning Details page. The learner can click the **here** link to be navigated to the version of training that is on their transcript.

Note: *No messaging displays for materials versioned with append versioning. This is existing behavior. This is existing behavior.*

Learning Details - Training with Recurrence

With this enhancement, if a learner views a training item that has recurrence enabled, and they have completed a previous version of the training, they will see **Request** as the primary action, instead of **Launch**. Clicking **Request** will initiate a new assignment of the new version of the training on the user's transcript. A pop-up will then appear, asking the user to confirm this assignment. The **Launch** action is still available in the Actions drop-down menu, but selecting **Launch** will open the training version from the user's transcript.

Note: *This behavior does not apply to trainings versioned with Append Versioning, only with Replace Versioning.*

Learning Details - Inventory Purchase

With this enhancement, in portals using Extended Enterprise functionality, any user with permission to purchase inventory for other users is able to purchase training licenses for other users via the Learning Details page. This purchased training can then be assigned to other users at a later time.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Inventory - Manage	Grants ability to purchase multiple learning object licenses with the intent to assign that training to other users at a later time. This permission can be constrained by OU and User's OU.	eCommerce

Purchase Inventory

To purchase inventory, follow these steps:

1. Search for and select the training item. *See Search for Training for additional information.*
2. The Learning Details page displays information about the training item. Click the Actions drop-down menu and select the **Add to Cart** option. If you are purchasing instructor-led training (ILT) inventory, next to the appropriate session, click the **Add to Cart** link in the Options column.
3. A pop-up appears where you can choose to purchase the training for yourself or for inventory. Select the **Others: Pre-Purchase** option and specify the number of users you are purchasing. Click **SUBMIT**.
4. The item is added to the shopping cart with the specified number of users listed in the Quantity column. You can update this amount here if necessary. *See Shopping Cart for additional information.*
5. Continue through the Checkout process. If you are purchasing ILT inventory, the system verifies that the number of seats being purchased is still available and that the user is able to purchase them. After purchasing the inventory, the inventory is visible on the Training Inventory page. *See Training Inventory for additional information.*

Learning Details - Post-work Behavior Correction

With a previous enhancement, any pre-work, post-work, or prerequisites that were unavailable to a learner were made accessible and actionable, provided the parent training was in an In Progress status on the user's transcript. This behavior had potential to create compliance issues for some organizations, as learners were able to access and complete their post-work before completing the parent training.

With the Feb '21 release, this behavior has been corrected, and learners cannot take action on post-work that is unavailable to them until they have first completed the parent training. This update closes compliance gaps and facilitates users completing training and associated post-work in the intended order.

Learning Details - Delete Ratings and Reviews

With this enhancement, in portals with Ratings and Reviews functionality enabled, users can delete ratings and reviews they have created for training items in the system. Administrators with the permission to manage ratings and reviews can also delete users' ratings and reviews from training items in the system.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Reviews and Ratings - Manage	Grants ability to delete other users' reviews/ratings. This is an administrator permission.	eCommerce - Administration
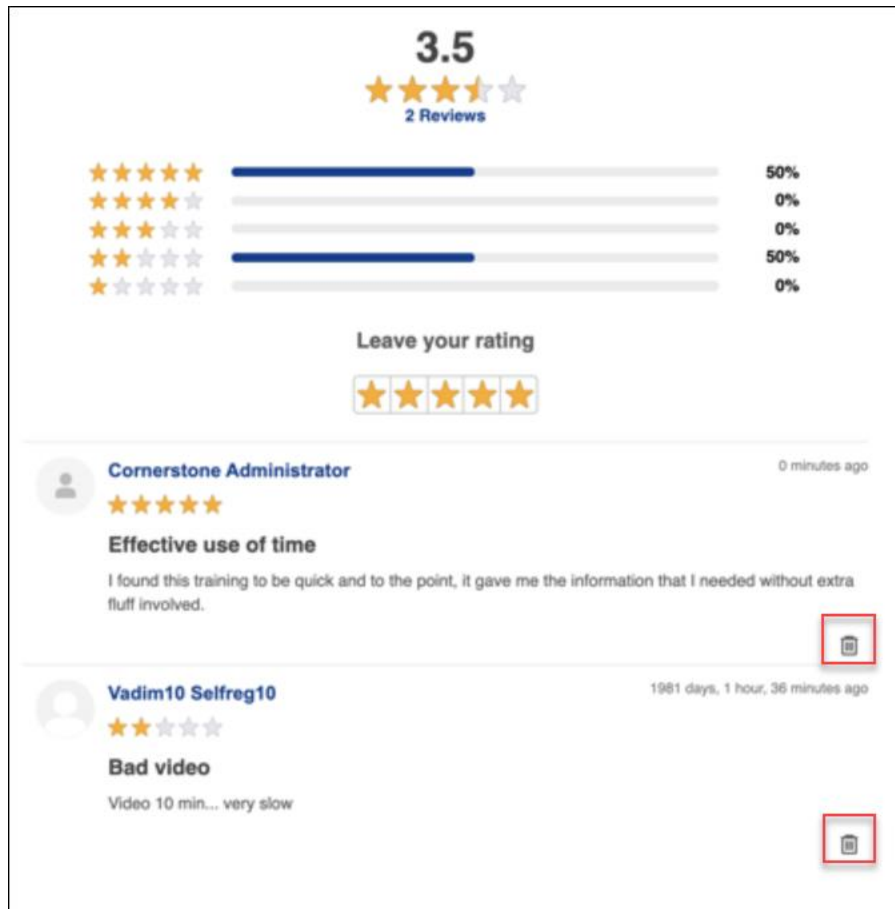
Delete Ratings and Reviews

In the Ratings and Reviews section of the Learning Details page, users can delete ratings and reviews they have created for a training item by clicking the Delete icon next to the rating or review.

Administrators with permission to manage ratings and reviews have access to a Delete icon for all users' ratings and reviews. To delete another user's rating or review, the administrator can navigate to the Ratings and Reviews section of a training item's Learning Details page and click the Delete icon next to any rating or review.

New Playlist Max Limit Preference

New Playlist Max Limit Preference - Overview

Prior to this enhancement, the maximum number of items that could be added to a playlist was 20.

With this enhancement, a new preference is available, allowing administrators to configure a playlist item limit of any value from 20 to 50. This new option provides increased flexibility when configuring playlists in the system, and allows organizations to further customize playlist functionality to their own needs.

Starter Guide

Click here to access the Playlists Starter Guide!

Implementation

This functionality is automatically available in all portals using the Learning module. Administrators can configure the playlist item limit via the Playlist Preferences page.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Playlist Preferences	Grants access to the Learning Playlist Preferences, where administrators can configure settings for the Playlist feature.	Learning - Administration

Playlist Preferences - Max Item Limit

A new Define Playlist Max Item Limit section has been added to the Playlist Preferences page. Administrators can use the option in this section to configure a max playlist item limit between 20 and 50. The preferences defaults to a 20 item limit.

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

Important: Learner Home must be enabled in the portal in order for Playlist and External Content functionality to be available.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Playlist Preferences	Grants access to the Learning Playlist Preferences, where administrators can configure settings for the Playlist feature.	Learning - Administration

Define Playlist Max Item Limit

In the Define Playlist Max Item Limit section, enter a value between 20 and 50. The specified value will be treated as the maximum number of items which playlist creators can add to their playlists.

If a playlist creator attempts to add more than the specified maximum number of items to a playlist, they receive an error stating, "You reached the maximum number of items for a playlist. Remove a few before adding more." The playlist creator will not be able to add more items to the playlist until they have removed enough items to be at or below the maximum value set via Playlist Preferences.

Reporting Fields - Learning

With the February 2021 release, four new learning content fields have been made available in reporting.

The new learning content reporting fields include:

FIELD NAME	REPORTING 2.0 SECTION	FIELD DESCRIPTION	FIELD TYPE
Online Course Protocol	Training > Training Details	This field displays the online course launch type. Available field outputs include: o AICC o SCORM 1.2 o SCORM 2004 o xAPI o Null (if no launch type value is available for the training item)	Text
Subscription Description	Training > Training Details	This is the description of the learning content subscription. More than one subscription may be associated with an online course, online content, or playlist. ***Note:*** *The user must have the Reporting 2.0 permission to view subscription fields in order to see this field.*	Text
Subscription ID	Training > Training Details	This is the unique identifier of the learning content subscription. More than one subscription may be associated with an online course, online content, or playlist. ***Note:*** *The user must have the Reporting 2.0 permission to view subscription fields in order to see this field.*	Text
Subscription Name	Training > Training Details	This is the name of the learning content subscription. More than one subscription may be associated with an online course, online content, or playlist. ***Note:*** *The user must have the Reporting 2.0 permission to view subscription fields in order to see this field.*	Text

In addition, an **Include inactive trainings** checkbox has been added to the filters that are available in the Training Title flyout in the Filters section of the Report Builder. When selected, inactive training items are included in the search results, and can be included in the report filter.

Implementation

This functionality is automatically enabled for all portals using Reporting 2.0. These new fields are only applicable to Reporting 2.0. These fields are not available in Custom Reporting.

Permissions

To access Reporting 2.0, go to REPORTS > REPORTING 2.0.

Permissions

For information about Reporting 2.0 permissions, see the following:

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

To access the fields included in this enhancement, the user must have the Training Report permissions included in the above Permissions List.

ServiceNow Integration

A ServiceNow integration is now available through the Edge Marketplace, meaning that organizations that rely on Cornerstone to train their employees can now directly integrate their Cornerstone Learning solution with their ServiceNow® HR Service Delivery solution.

This integration was originally made available with the Nov 13 2020 patch.

Considerations

In order to use the ServiceNow integration, your organization must first meet the dependencies outlined here: **Spoke Dependencies**

Implementation

To get started with the ServiceNow integration, click the **GET STARTED** button for the integration tile in the Edge Marketplace. To access the Edge Marketplace, go to: ADMIN > TOOLS > EDGE and click the **Marketplace** link.

To enable the ServiceNow integration via the Edge Marketplace:

1. Search for and click the ServiceNow integration tile.
2. Click the **INSTALL** button to install the integration.
3. Review and Accept the terms and conditions of the integration and click the **INSTALL** button.
4. Click the **CONFIGURE NOW** button.
5. Configure the integration on the Settings tab and click the **SAVE** button.
6. Navigate to the Edge Integration Center, find the ServiceNow integration, and toggle the Enablement switch for the integration to the On position to complete the enablement.
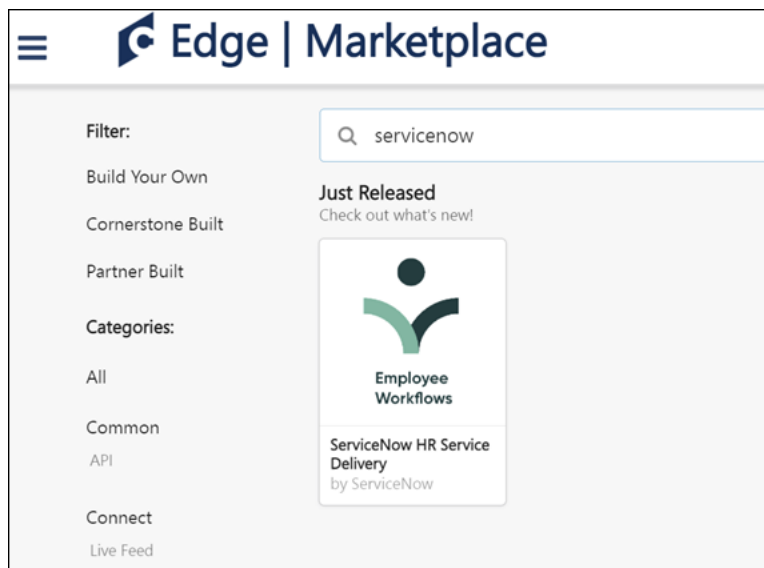
Integrate your Cornerstone application with your ServiceNow instance. Register an OAuth application in Cornerstone and authenticate requests from ServiceNow using the following documentation: **Set Up the Cornerstone Spoke**

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

Training Exemption Safelist

Training Exemption Safelist

Prior to this enhancement, the ability to mark training exempt was completely controlled by the *Mark Transcript Exempt* permission, meaning that any user with this permission could mark their employees exempt from any training item.

With this enhancement, administrators can configure a training exemption approval safelist at the training level, which then grants only specified users the ability to mark that training item as exempt and approve exemption requests for that training. Training exemption approval safelist criteria can be configured for training items via a new tab in the Course Catalog.

Considerations

o   If a safelist has been configured for a training item, in order to see the **Mark Exempt** option, users must have both the *Mark Transcript Exempt* permission AND be on the training exemption safelist for the training item.
o   If a safelist is not utilized for a training item, the *Mark Transcript Exempt* permission is still respected as it was prior to this enhancement.
o   Using safelists is optional.

Implementation

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

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 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	Learning - Administration

	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.*	
Mark Transcript Exempt	Grants ability to exempt users from a learning object, using the "Mark Exempt" link on the top right corner of the target user's Transcript/Training details page. This permission can be constrained by OU, User's OU, and User's Subordinates. This is an administrator permission. With the May '17 release, this permission also applies to prerequisites, pre-work, and post-work. Users without this permission cannot mark any training type exempt for a user.	Learning - Administration

Course Catalog - Training Exemptions

A new Training Exemptions tab has been added to the Course Catalog, allowing administrators to configure training exemption approval safelist criteria for training items.

To access the Course Catalog, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > COURSE CATALOG. Then, search for the LO you want to modify and click the Options drop-down menu next to it. Click the **Edit** link.

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

Training Exemptions Tab

On the Training Exemptions tab, set criteria which determines which users can grant exemptions and approve exemption requests for this training item.

To set training exemption criteria for a training item:

1. Select an OU type from the **Select Criteria** drop-down.
2. Click Search icon 🔎 to select the specific OU Division ▾🔎 .
3. Search OUs by Name, Owner, or ID. Enter full or partial information and click **SEARCH**.

4. Select an OU by clicking the Add icon ✿.
   o If selecting more than one OU within the same OU type.
      o Click Add icon ✿another OU to the selected list within the same pop-up.
      o If OU name has already been selected, the Add icon ✿ will be replaced by "N/A."
5. If necessary, you can create a new group to use as the criteria by clicking **Create New Group**.
   o **See - Creating Groups** for more information
      o Select New Group
      o Click **DONE** to add the OU to the training exemption approval safelist.

Exempting Training and Approving Exemption Requests

Only the users included in the criteria selected on this tab will have the ability to grant training exemptions and approve exemption requests for this training item:

o Users who are included in the training exemption safelist criteria for a training item will have access to a **Mark Exempt** option when viewing the training item on a user's transcript.

o Users who are included in the training exemption safelist criteria for a training item will be allowed to approve users' exemption requests for the training item.

o Users who are NOT included in the training exemption safelist criteria for a training item will not be allowed to approve users' exemption requests for the training item. Instead, they will see a message that indicates they can only deny request: "The learning exemption request is not approved. You are not on the list of accepted users to approve this exemption. Please deny to return the request to the learner."

vILT Connector

vILT Connector (Early Adopter) Enhancements

A Virtual Instructor-Led Training (vILT) connector is available, allowing organizations and partners using Cornerstone to build integrations with the virtual meeting provider of their choosing. This connector allows seamless integration with Cornerstone Learning portals, connects end users to virtual meeting sessions, allows attendance tracking, and provides scheduling tools for instructors.

With the Feb '21 release, the following enhancements have been made to the vILT connector:

o Support for launching a vILT session through email
o Multi-account support
o Support for third party extended options (This enhancement requires partner involvement)

For more information about enabling and using the vILT connector:

o vILT Connector Overview - *See Virtual Instructor-Led Training (vILT) Connector (Early Adopter).*
o Enable vILT Connector - *See Enable vILT Integration.*

For information about creating ILT sessions:

o *See ILT Session - Create/Edit.*

Implementation

This functionality is automatically available for the vILT connector. To enable an integration created using the vILT connector, navigate to the Edge Marketplace.

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
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and	Learning - Administration

	User's ILT Provider. This is an administrator permission.	
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

vILT Connector - Launch Session Link Tag for Email

If an administrator has configured the ILT Session Register email via Email Administration, when learners register for training, they receive an email with details about the time and date of the training, along with a link to withdraw from the session if necessary.

With this enhancement, a new LAUNCH.SESSION.LINK tag is available when configuring the ILT Session Register email. This new tag, when incorporated into the body of the ILT Session Register email, provides email recipients with a customized link which allows them to immediately launch the virtual session by clicking the link.

To access Email Administration, go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT. To configure a template for the ILT Session Register email, search for the ILT Session Register email type and click the Add Email option next to it.

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

Launch Session Link Tag

To include a link that users can click to launch their virtual session in the ILT Session Register email, the administrator can add the LAUNCH.SESSION.LINK tag to the body of the email. A functional link will replace the tag when users view the email. This email tag functions for both single and multi-part sessions.

vILT Connector - Multi Account Support

Prior to the February 2021 release, when an administrator configured their account to integrate with the vILT connector, they added account details relevant to their preferred meeting provider. For example, if they used MS Teams as a provider, they would provide credentials and their MS Teams portal URL. This information was used by the vILT connector to link to their portal and accomplish key tasks in the ILT workflow, such as creating an instructor or a session. Administrators were only able to provide one set of credentials.

With this enhancement, administrators can enter multiple sets of credentials, meaning administrators can add multiple vendors for which sessions can be created using the vILT connector. There is no limit to the number of vendors or providers that can be associated with the Edge Marketplace. There are no other changes to the provider account setup process.

vILT Connector - Support for Third Party Extended Options

Each third party meeting vendor (e.g. Webex, Zoom) has many options that can be configured for virtual meetings. For example, a host or administrator can choose whether to start a meeting with everyone muted by default, and whether meetings are set to auto-record. These options are often needed for instructor-led training (ILT) sessions run through Cornerstone.

With this enhancement, integrations using the vILT connector can now surface some extended options through the Cornerstone UI so that an administrator may configure them when creating a session.

To access the Extended Options page, go to: ILT > MANAGE EVENTS AND SESSIONS. Either search for an existing session to edit or create a new session, and progress through the editing or creation workflow to the Details page. In the Configure Extended Options for vILT section, click the **Click Here** link to open the Extended Options page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
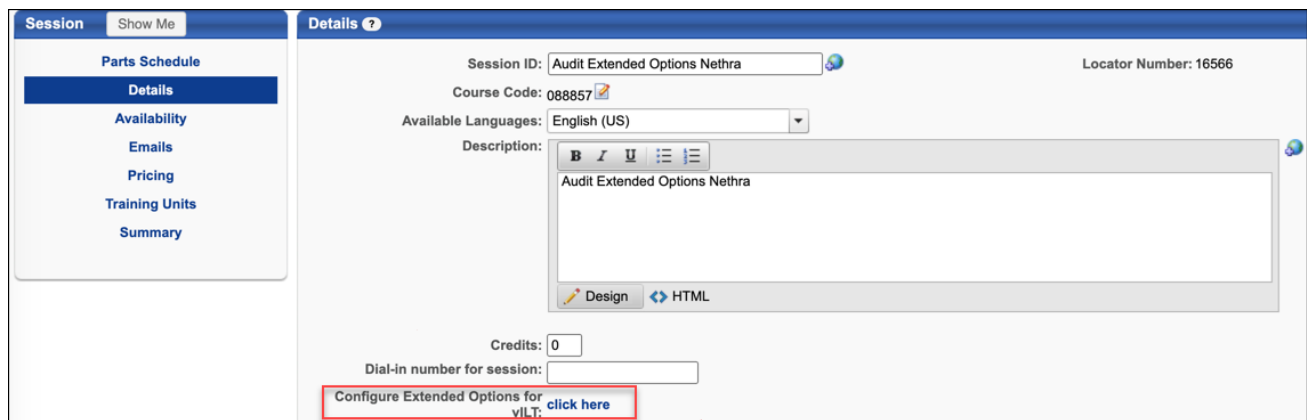
Considerations

The following considerations apply to this enhancement:

o Only 100 controls are supported on the Extended Options page.
o Only three nested levels are supported for any one extended option. For example: **Audio > Mute > Mute only people who come in after five minutes**.

- o The Extended Options page is only available for organizations which have an integration with vILT connector providers.
- o Three types of extended options are supported:
  - o Radio button extended option
  - o Checkbox extended option
  - o Text box extended option

Performance

Goal API – Lock Goals

Prior to this enhancement, when updating goals via the API, if a manager locked a goal, these locks were ignored.

With this enhancement, when goals are updated, a new Lock Goals endpoint now respects all rules regarding locking and unlocking goals enforced in customer portals.

This enhancement applies to the Goals API when used with Careers and Performance.

Implementation

This functionality is on by default for clients that have purchased the Cornerstone Foundational APIs in Edge.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Reporting Fields – Succession

New Value for "[metric name] - Calibration Source" Field

Prior to this release, the reporting field "[metric name] - Calibration Source" provided four possible values to identify the source of a metric: Helicopter View, Task, Snapshot, and Metric Grid Report.

With this enhancement, a new value, "Task-PrePopulated", is added to represent metrics that are pre-populated into a task but not edited. The existing value, "Task", now only relates to metrics edited within the task. This allows users to distinguish between metrics pre-populated to task vs edited in the task, and quickly see what an assessor changed.

New Succession Fields
This enhancement was released with the December 18, 2020 patch.

With this release, the following new fields are added for Succession 'Assessor' and 'Employee Relationship' task types:

FIELD NAME	SECTION	DESCRIPTION	FIELD TYPE
Removed by Org Change	Succession Task	Indicates that an assessee is removed due to a change impacting the availability used to set up the task, such as a change to the user's OU.	Text
Removed by Assessor	Succession Task	Indicates that assessee is removed by the assessor within the task, such as in the org chart step.	Text

Note: These fields do not apply to 'Job Pool' or 'Talent Conference' task types.

Implementation

o   These features are on by default.
o   The change to the "[metric name] - Calibration Source" field is visible for tasks launched after the release of this enhancement.

SMP PowerPoint Template Report Enhancement

Prior to this enhancement, when running the SMP PowerPoint Template standard report, results were only returned for fields not included in the Succession task, even if they were read-only fields pulled into the task from other areas.

With this enhancement, these restrictions are removed and results are returned for all fields categorized under Performance, Resume, or User, even if they are not included in the task.

Note: The tags categorized under Succession must remain in the task to return results.

To open the end-user view, go to REPORTS > STANDARD REPORTS > SUCCESSION > SMP POWERPOINT TEMPLATE REPORT

How Does This Enhancement Benefit My Organization?

The SMP PowerPoint Template standard report now includes many fields not specific to a task, making it more flexible to export talent profiles.

Implementation

This feature is on by default for Succession clients who use the SMP PowerPoint Template.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
SMP PowerPoint Template Report	Grants ability to create custom PowerPoint templates with which to report on incumbents for an SMP task. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Reports - Talent/Succession
SMP PowerPoint Report Preferences	Enables administrators to manage tags for specific fields for use in the SMP PowerPoint Template report. This is an administrator permission.	Talent/Succession - Administration

Total Compensation with Employee Compensation and Compensation Types

Prior to this enhancement, organizations tracked employee's compensation payments in many different systems, so keeping track of all the different systems where employee compensation exists is time consuming. Additionally, salary and bonus information is stored separately from other Compensation Types.

With the new Total Compensation feature:

o Administrators can easily create new Compensation Types for all types of employee compensation on the new Compensation Types page.
o Organizations can view full compensation details for an employee on the Employee Compensation page.
o Edge Import Compensation Feed imports employee compensation records to the Employee Compensation page.

Updated Compensation Types page

To access the Compensation Types page, go to ADMIN > TOOLS > COMPENSATION MANAGEMENT > COMPENSATION TYPES.

 Administrators with appropriate permissions can view, create, edit, delete, and activate/deactivate employee compensation types.

Employee Compensation page

To access the Employee Compensation page, go to ADMIN > COMPENSATION MANAGEMENT> EMPLOYEE SALARIES.

Users with appropriate permissions can now view all compensation details on one page.

Edge Import

To access the Edge Import Homepage, go to ADMIN > TOOLS > EDGE > IMPORTS AND FEEDS.

Edge Import has a new configuration template, configuration setup, and load/feed for Employee Compensation.

Edge Import graphics

How Does this Enhancement Benefit My Organization?

Customers can now use the Employee Compensation page to see the total amount of monetary value the organization is providing each person. Clients can also manually create and edit employee compensation records directly in Employee Compensation.

Implementation

o Customers currently migrated to Employee Compensation automatically have access to Employee Compensation and Compensation Types.

o After GTS feed/load clients migrate and DLW feed/load clients migrate to Edge Import, Cornerstone can migrate to Employee Compensation with Compensation Types.

o DLW clients must migrate their DLW feed/load to Edge Import using the to Edge Import Wizard or by setting up a new Edge Import feed via the Configuration Wizard. The Configuration Wizard matches the client's columns from their file to our Employee Compensation fields in Edge Import.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Compensation Type - View	Grants view-only access to the Compensation Types page. This permission is only granted to administrators who also have Employee Salary Management permission. This is an administrator permission.	Compensation - Administration
Compensation Type - Edit	Grants access to the Compensation Types page to create, edit, inactivate, and delete Compensation Types. This permission is only granted to administrators who have Employee Salary Management – Edit permission. This is an administrator permission.	Compensation - Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Salary Management - View	Grants access to the Employee Salary Management page view users' salaries or rates. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Compensation - Administration
Employee Salary Management	Grants access to the Employee Salary Management page to edit, add, and view users' salaries or rates. This permission can be constrained by OU, User's OU, and User. This is an administrator permission.	Compensation - Administration

Recruiting

Ability to Mark Onboarding Tasks Cancelled or Complete

Ability to Mark Onboarding Tasks Cancelled or Complete - Overview

Prior to this enhancement, onboarding tasks could not be marked cancelled or complete. This resulted in having onboarding tasks that may be out of date or irrelevant for hiring managers and new hires.

With this enhancement, **Mark Complete** and **Mark Cancelled** options are added to the Status column on the UNIVERSAL PROFILE > ONBOARDING tab for individual tasks. This helps you to better manage onboarding tasks that are no longer needed or have been completed outside the workflow.

As part of a separate enhancement, onboarding workflows can now be cancelled after the onboarding start date. *See* **Cancel Onboarding Workflows After Hire Date - Overview** on page 298 *for additional information.*

How Will This Enhancement Benefit My Organization?

o Increased accuracy of new hire and onboarding data
o Ability to mark onboarding tasks complete, which is helpful for tasks completed outside the workflow
o Ability to cancel onboarding tasks that are no longer relevant to the new hire

Use Cases

o A new hire changes their manager in the first month of employment but has an onboarding form assigned to their former manager that has not been completed. The onboarding coordinator wants to be able to mark the task as complete so that they can manage outstanding tasks. With the existing functionality, the onboarding form stays with the former manager without a way to mark it as complete because the manager change occurred outside the onboarding workflow. With this enhancement, the onboarding coordinator can mark the task complete on the new hire's UNIVERSAL PROFILE > ONBOARDING tab.
o A new hire completes a direct deposit form on paper outside the onboarding workflow. The form remains on the new hire's onboarding dashboard as a task that has not been completed, despite the form having been completed offline. This is impactful because the onboarding coordinator clients utilizes percent task completion to trigger their data feeds to the HRIS. Having a task sit open impacts the ability for the user to be sent over to the HRIS. If a user is not sent over to the HRIS, then the onboarding coordinator is unable to get new hire into the payroll and benefits system.
o A new hire has an onboarding task that is no longer relevant in their onboarding process. However, with the existing functionality, the onboarding coordinator does not have a way to cancel the task. With this enhancement, the onboarding coordinator can cancel the individual task from the new hire's UNIVERSAL PROFILE > ONBOARDING tab.
o A new hire has an optional task on their onboarding workflow. The new hire chooses not to complete the task. The onboarding coordinator wants to be able to cancel the task since it is no longer relevant to their onboarding process, which is different than the task being completed offline. With this enhancement, the onboarding coordinator can cancel

the task so that the task is removed from the workflow and the percentage of task is not impacted because it is reset to match the updated number of tasks.

Implementation

Upon implementation, this enhancement is available for all portals using Onboarding with Recruiting.

Permissions

The following new permission applies to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Onboarding: Manage Onboarding Tasks	Grants the ability to cancel an onboarding task or mark the task as complete. This permission also grants the ability to cancel onboarding workflows after the hire date.	

The following existing permissions apply to this enhancement:

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

Universal Profile Onboarding Tab - Complete/Cancel Task

With this enhancement, **Mark Complete** and **Mark Cancelled** options are added to the Status column for individual onboarding tasks when viewing a new hire's Onboarding tab in their Universal Profile. Both form tasks and integration tasks can be cancelled.

To access the Onboarding tab, go to UNIVERSAL PROFILE > BIO and select the Onboarding tab. Or, go to RECRUIT > ONBOARDING DASHBOARD and click the user's name on the dashboard.

Note: *Tasks can be cancelled or completed whether they are assigned before the hire date or after the hire date.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Onboarding: Manage Onboarding Tasks	Grants the ability to cancel an onboarding task or mark the task as complete. This permission also grants the ability to cancel onboarding workflows after the hire date.	
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

Mark Onboarding Task Complete

An onboarding task can now be marked as complete, which allows tasks that are no longer needed or that have been completed outside the workflow to be placed into a status of completion.

To mark a task as complete:

1. Go to UNIVERSAL PROFILE > BIO > ONBOARDING tab.
2. Click the options drop-down in the Status column.
3. Select **Mark Complete**. The Onboarding tab updates to show the task as completed. This action also triggers the **Onboarding Form Completed** email, if enabled and active in **Email Administration**.

Once the task is marked complete:

o The onboarding completion percentage, which displays on the onboarding dashboard and in the **Status** field on the new hire's UNIVERSAL PROFILE > ONBOARDING **tab**, is updated automatically based on the tasks that have been completed.
o It is removed from the user's **UNIVERSAL PROFILE > ACTIONS** page.
o Tasks that are In Progress or Complete will still be associated with the hire date.
o The task can still be viewed in the Onboarding tab as completed.
o For form tasks, child tasks can be triggered to the appropriate assignees upon parent tasks being marked as completed so that the child task can be completed. Child tasks cannot be marked complete until the parent task is completed.
o For integration tasks, because child tasks are dependent upon a response from a vendor, marking an integration task as completed does not trigger any reviewer or child tasks.

Mark Onboarding Task Cancelled

An onboarding task can now be marked as cancelled, which allows tasks that are no longer needed in the workflow to be placed into a status of cancelled. Both form tasks and integration tasks can be cancelled.

To mark a task as cancelled:

1. Go to UNIVERSAL PROFILE > BIO > ONBOARDING tab.
2. Click the options drop-down in the Status column.
3. Select **Mark Cancelled**.

Once the task is marked cancelled:

o It is removed from the user's **UNIVERSAL PROFILE > ACTIONS** page.
o The onboarding completion percentage, which displays on the onboarding dashboard and in the **Status** field on the new hire's UNIVERSAL PROFILE > ONBOARDING **tab**, is updated automatically to reflect the change as a result of the cancelled task.
o Tasks that are In Progress or Complete will still be associated with the hire date.
o The task can still be viewed in the Onboarding tab as Cancelled.
o Any child tasks are also cancelled if the parent task is cancelled. The parent and child tasks are removed from the user's UNIVERSAL PROFILE > ACTIONS page.

Assessment Connector Enhancement

Assessment Connector Enhancement - Overview

Prior to this enhancement, assessment scores on Manage Candidates did not display. In addition, assessment scores were not included on the resume carousel or applicant cohort page.

With this enhancement, assessment scores now appear on Manage Candidates via the Assessment Connector. This enables the score to show for each assessment package. In addition, an Assessment section is added to the resume carousel and applicant cohort page, showing both the overall score and any individual assessment scores in a package.

Implementation

This enhancement is available for all customers using the Edge Assessment Connector in the **Edge Marketplace** or who are using integrations built on top of the Edge Assessment Connector. Additional instructions for enabling and configuring the connector are available on the **Setup tab of the integration in Edge**.

Integration providers will need to update the integration to account for the new features. Please reach out to your vendor for additional information regarding availability and timing.

This enhancement does not extend to custom assessment integrations.

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

View Assessment Scores

With this enhancement, assessment scores now display on Manage Candidates, the resume carousel, and the applicant cohort page. The score shows for each assessment package.

Manage Candidates Page

On the Manage Candidates page, each assessment displays in its own column, showing the result along with the overall score for the assessment. Including the result and score on Manage Candidates can help recruiters interpret the score. The result is passed to Cornerstone by the assessment provider and is not defined by Cornerstone.

The columns can be hidden via the **Customize Columns** option.

Assessments Section on Resume Carousel and Applicant Cohort Page

An Assessments section is added to the resume carousel (pictured) and applicant cohort page. This section displays all assessments assigned to the applicant and that were part of the application. The completion status, overall score, and date completed displays.

Click **Show Details** to view the score for individual assessments that are part of an assessment package.

# Broadbean Job Posting Integration - Candidate Profile Enhancement

Note: This feature was released as part of the 4 December 2020 patch.

With this enhancement, the qualifications in the Minimum Qualifications field for a job requisition can now be sent to Broadbean's **Candidate Profile** field.

It is important to note that in order to use the **Candidate Profile** field, you must confirm with your Broadbean representative that your integration can use this field.
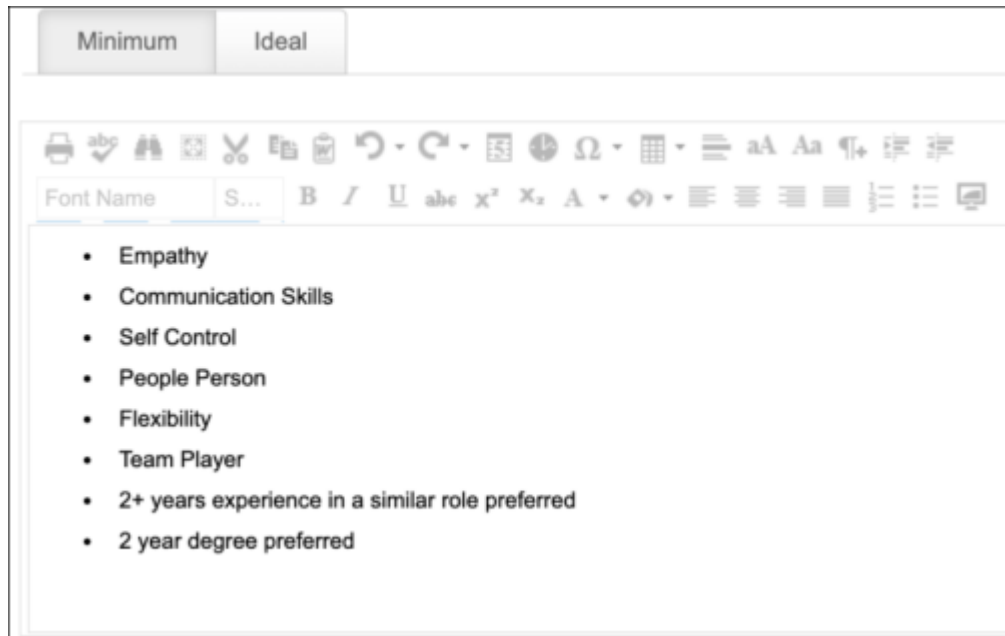
To enable this feature, a new **Candidate Profile** field is added to the Broadbean Job Posting integration settings page in Edge. When the field is toggled to on, Broadbean will then independently choose to which specific job boards the Candidate Profile will be sent. It will be necessary for clients to work with Broadbean directly to select the job boards to which they would like to send the **Candidate Profile** field data.
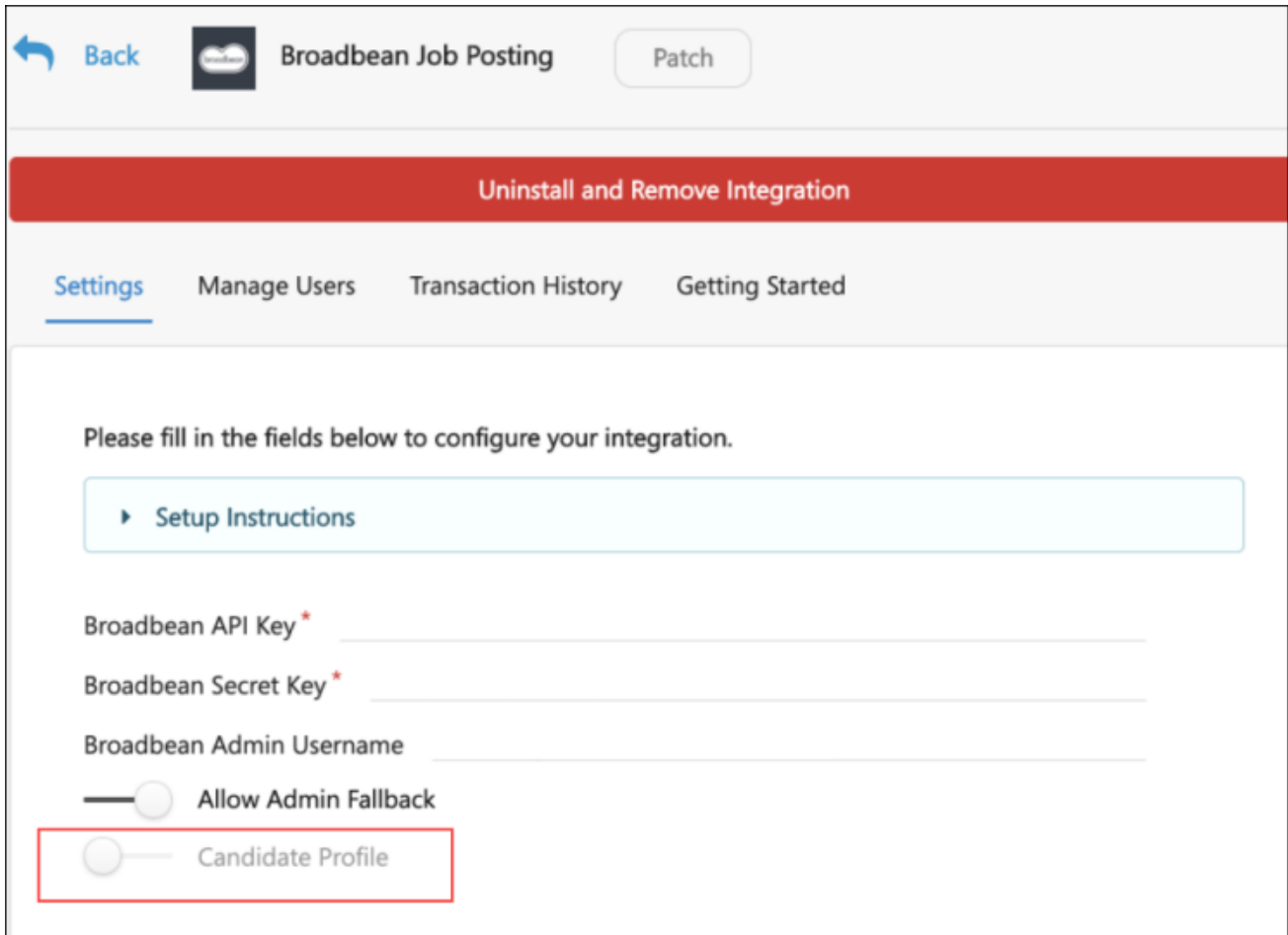
How Will This Enhancement Benefit My Organization?

With this enhancement, a customer that enables this feature will have a requisition's minimum qualifications sent to Broadbean's **Candidate Profile** field for distribution to specific job boards.

Implementation

The **Candidate Profile** field is available for the Broadbean Job Posting integration in **Edge Marketplace** for all organizations using the Recruiting suite and that also have an account with Broadbean. Additional instructions for the Broadbean Job Posting integration are available on the **Setup tab of the integration in Edge**.

Note: *Please confirm with Broadbean that your account is eligible to use this field.*

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

Cancel Onboarding Workflows After Hire Date

Cancel Onboarding Workflows After Hire Date - Overview

Prior to this enhancement, onboarding workflows could only be canceled before the hire date. This resulted in having incorrect data in onboarding dashboards for hired candidates who did not or were not able to start the job. Cancellation of the workflow could only occur by terminating the new hire in the system. In addition, when certain onboarding tasks were no longer needed in the workflow or were completed outside the workflow, they could not be marked completed or canceled.

With this enhancement, the **Cancel Onboarding** option on the Onboarding Dashboard page can now be used to cancel onboarding after the onboarding start date. This helps you to better manage new hires who did not or were not able to start the job.

How Will This Enhancement Benefit My Organization?

o Increased accuracy of new hire and onboarding data
o A clean onboarding dashboard with no outstanding workflows and tasks for no-show hires

Implementation

Upon implementation, this enhancement is available for all portals using Onboarding with Recruiting.

Permissions

The following new permission applies to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Onboarding: Manage Onboarding Tasks	Grants the ability to cancel an onboarding task or mark the task as complete. This permission also grants the ability to cancel onboarding workflows after the hire date.	

The following existing permissions apply to this enhancement:

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

Onboarding Dashboard - Cancel Onboarding Workflow

Prior to this enhancement, the **Cancel Onboarding** option on the onboarding dashboard was only available to cancel onboarding workflows before the onboarding start date.

With this enhancement, the **Cancel Onboarding** option can now be used to cancel onboarding workflows after the onboarding start date. This helps you to better manage new hires who did not or were not able start the job.

To access the Onboarding Dashboard, go to RECRUIT > ONBOARDING DASHBOARD.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee Onboarding: Manage Onboarding Tasks	Grants the ability to cancel an onboarding task or mark the task as complete. This permission also grants the ability to cancel onboarding workflows after the hire date.	
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

Cancel Onboarding

To cancel an onboarding workflow after a new hire's start date:

1. Click **Cancel Onboarding** from the options drop-down for the user. This opens a confirmation pop-up.

   Canceling the onboarding workflow cancels all incomplete tasks for the user in the workflow. The user is converted back to an external candidate. The user's employee relationships are converted back to the relationships they were in at the time onboarding was started.

2. Click **YES** to cancel the onboarding. Once **YES** is clicked, the cancellation cannot be undone. Or, click **NO** to close the pop-up without canceling the workflow.

Once the onboarding workflow is cancelled:

- o The new hire is moved back to being an external candidate.
- o The percentage of onboarding tasks is updated according to the tasks that have been completed.
- o Onboarding tasks that are in an In Progress or Complete status will still be tied to the hire date.
- o Tasks are removed automatically from the new hire's Universal Profile.

Candidate API

Candidate API (Early Adopter) - Overview

Note: *This feature was made available as part of the 13 November 2020 patch. This feature was first announced with the October '20 release.*

Today, organizations use many tools in addition to their applicant tracking system (ATS) to recruit and hire top talent. The ability to import and export candidate and application data in real time from Cornerstone's recruiting solution to point solutions is a must for most clients. Having a reliable, easy to use externally facing candidate API will enable clients to maintain data integrity and get the most return from each point solution.

Prior to this enhancement, customer's only option was to use the legacy Job Application API, which does not support posting answers to prescreening questions, compliance questions or disclaimers. In addition, the legacy Job Application API is unable to post applications in an incomplete status. Further, the legacy API can only create an application when the application is limited to a resume, cover letter, and additional attachments, or by redirecting the candidate to the Cornerstone application workflow to complete the full application and non-supported action items.

Cornerstone's new Candidate APIs provide the ability to get a requisition's full application workflow, including prescreening and compliance questions, disclaimers, notes, and attachments, and then create an application and candidate in your Cornerstone portal. Applications can be posted in a complete or incomplete status. If incomplete, recruiters can invite candidates to finish their application within Cornerstones.

As part of this Early Adopter release, Cornerstone is introducing two new endpoints:

o Get Application Workflow - This endpoint retrieves a requisition's full application workflow, including action items that were previously irretrievable via the legacy Job Application API like prescreening questions, compliance questions, disclaimers, and notes.
o Post Candidate and application - This endpoint posts a candidate and application to your Cornerstone portal.

These externally facing endpoints are available for both clients and vendors to utilize. With the Candidate API (Early Adopter), the new Get Application Workflow and Post Candidate and Application endpoints enable clients to develop end-to-end integrations with recruiting solutions like chat bots, job boards, candidate relationship management solutions (CRM), marketing tools, and more.

Note: *Upon release of the new Candidate APIs, the legacy Job Application API will still be supported.*

Use Cases

Chat Bots

1. John Smith goes to ABC Company's Career Site to search for a Software Engineers job.
2. John sees ABC offers a chat feature on their career site.

3. Rather than spending time searching for a job, John engages with the chat bot regarding Engineering type roles.

4. The chat provider writes to Cornerstone's Job Requisition APIs (Get Job Requisition, Get Job Ad Details, and Get Job Requisition Custom Fields) so that they can recommend jobs to John based on job descriptions and location.

   Tip: We recommend also writing to the Get Job Requisition Custom Fields endpoint, as many clients use custom fields to specify fields unique to their organization.

5. The chat provider identifies a Software Engineering (req123) position as a great recommendation and asks if John would like to apply to this position.

6. When John replies "Yes," the chat provider calls the GET Application Workflow endpoint to request the application details for req123. Optionally, the chat provider may also check if the candidate is an internal or external candidate by calling Cornerstone's Employee Global Search API so that they can request the correct application workflow.

7. Rather than sending John to another page to complete the application, all application questions are made available for him within the chat experience, which increases ABC's chance of a successful application submission.

8. After answering the last application question, John lets the chat bot know he is ready to submit his application.

9. The chat provider calls the second endpoint, POST Application and Candidate, to create a new user in Cornerstone and create John's application.

10. In Cornerstone, req123 has been configured previously to ensure that all new applicants go straight to the In Review status rather than the New Submission status. Req123 has also been configured to automatically assign an assessment to all applicants in the In Review status.

11. Once John's application is created, he receives ABC's Apply as Guest Application Submission Email Confirmation and is automatically assigned the assessment.

12. Recruiters now see that John has applied to req123 and can review his resume, contact details, and all posted application responses. Recruiters can also see that the assessment was successfully assigned.

Job Boards

1. Denise goes to her favorite job board, Work4You, to search for Software Engineering jobs in her area.

2. Work4You writes to Cornerstone's Job Requisition APIs (Get Job Requisition, Get Job Ad Details, and Get Job Requisition Custom Fields) to display all jobs posted by their mutual client, ABC.

   Tip: It is recommended that you also write to the Get Job Requisition Custom Fields endpoint, as many clients use custom fields to specify fields unique to their organization.

3. Denise finds 10 Software Engineering roles matching her zip code.

4. After reading the job details, Denise is interested in ABC's Software Engineer (req123) role and clicks Apply Now on the job board.

5. Work4You calls the GET Application Workflow endpoint to populate the application, enabling Denise to apply immediately from Work4You without having to navigate to another site.
6. Denise clicks Submit after uploading her resume and answering all application questions.
7. The application is submitted to the Software Engineer (req123) role.
8. Recruiters can see that Denise applied to Req123 and can review her resume and contact details, as well as and all applicable action items.
9. Recruiters can also see that Denise's application came from Work4You.

Candidate Relationship Management (CRM) Tools

1. Sally Lee is a Recruiter at ABC Company and uses BLITZ, a candidate relationship management tool, to source and maintain relationships with candidates.
2. BLITZ already writes to Cornerstone's requisition endpoints so that recruiters can see open positions in BLITZ without having to navigate to Cornerstone.
3. Sally is recruiting for their open Software Engineering (req123) position.
4. While looking at her engineering talent pool in BLITZ, Sally spots Jack, a very qualified candidate for req123.
5. Rather than manually downloading Jack's resume and adding Jack to req123 in her Cornerstone portal, Sally clicks Add Candidate to Requisition in BLITZ and selects req123.
6. BLITZ calls the POST Application and Candidate endpoint and adds Jack and his resume to ABC Company's Cornerstone portal.
7. Sally returns to her Cornerstone portal and sees that Jack has been added to req123 but has an incomplete application.
8. Sally invites Jack to apply so that he can finish the application and be considered for req123.

Notes:

o *It will be up to the candidate relationship management (CRM) provider (BLITZ in the above scenario) to determine at what point 1) an applicant is added to the applicant tracking system (ATS) in Cornerstone and 2) the POST Application and Candidate endpoint is called.*
o *The endpoint will create a candidate if the candidate does not exist and will check if the candidate exists by their email.*
o *If the candidate does not exist, a new candidate and application will be created.*
o *If an application has already been started but not completed for the specific requisition, the POST Application and Candidate endpoint may be used to complete and or replace the existing application.*

API Resources

See the following resources in the Cornerstone Success Center (CSC) for more information about APIs and the API Explorer:

o **Introduction to APIs**
o **API Explorer Overview**

Implementation

Clients will use the Candidate API to build and maintain their own integrations with third party recruiting tools. Additional documentation is available in the API Explorer upon release of the Candidate API. *See Edge - API Explorer.*

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

Compare Candidate API and Job Application API

Note: *This feature was made available as part of the 13 November 2020 patch. This feature was first announced with the October '20 release.*

The legacy Job Application API is built with the intention of integrating with Stepstone and other job boards that would have candidate involvement. The API could also be used for clients with very simple application workflows (i.e., just a resume). If the client has an application workflow with more types of action items, there needs to be candidate interaction so that the candidate can be redirected to the application workflow on the client's career site.

The new Candidate API endpoints were created to be flexible in integrating with many different types of outside systems. Not only can clients utilize these endpoints to more deeply integrate with job boards, as more action item types are supported, clients can utilize the POST Application Workflow to submit candidates directly from a CRM in a complete or incomplete status.

FEATURE	JOB APPLICATION API	CANDIDATE API ENDPOINTS
Submitting application with a resume in a completed state	YES	YES
Submitting application in an incomplete state	NO	YES
Redirecting candidates to the career site, if there are unsupported action items	YES	NO
Support Additional Attachments and Cover Letter	YES	YES
Support PSQs	NO	YES
Support Compliance Questions	NO	YES
Support Disclaimers	NO	YES
Support Notes	NO	YES

Career Site "View Resume" Link Reflects File Type

Prior to this enhancement, the name of the **View Resume** option on the My Profile page in career sites and the My Jobs page on the internal career site did not provide a clear enough sense of what would be opened by clicking the link. This was especially impactful for candidates using a screen reader, because the context of the name could be misleading or unclear.

With this enhancement, the **View Resume** link will update dynamically based on the file type being opened. The name of the link will be as follows based on the file type:

- **View Resume (PDF)** if the file type is .pdf.
- **View Resume (DOC)** if the file type is anything other than .pdf.
- **View Resume** if a resume file was not attached and the candidate input resume data into fields manually.

Implementation

Upon implementation, this enhancement is available for all portals using Recruiting.

End of Support for Hiring Manager Shortlist with the April '21 Release

Note: *The deprecation was first announced in the October '20 release.*

With the April '21 Release, Cornerstone will end support of Hiring Manager Shortlist and support of defects will stop at this time. A deprecation date has not yet been set. Customers that utilize the Hiring Manager Shortlist are encouraged to begin using Request Candidate Feedback to share candidates with hiring managers and other business stakeholders and collect feedback.

With Request Candidate Feedback, recruiters can share candidates in any status, across any requisition. Recruiters can share candidates with the requisition's hiring manager and applicant reviewers, as well as any business stakeholder in the organization. This flexibility allows recruiters to align with subject matter experts and other key decision makers in the organization.

With Request Candidate Feedback, hiring managers and business stakeholders can see a candidate's resume/CV, answers to prescreening questions, and comments left by the recruiter. Request Candidate Feedback supports the ability to collect an "advance" or "do not advance" vote, as well as comments for the recruiter to read if configured to do so. These comments enable recruiters and the hiring team to better align on key competencies required for a role and a specific candidate's qualifications. The entire experience is mobile-friendly, making the process of reviewing candidate's and providing feedback faster and more convenient.

Learn more about Request Candidate Feedback on the following Online Help topics:

o **Manage Candidates - Request Candidate Feedback**
o **Manage Candidates - Give Candidate Feedback**

Deprecation of Manage Applicants in a Future Release/Redirect to Manage Candidates with the April '21 Release

Note: *The deprecation was first announced in the May '20 release.*

With the April '21 release, when the Applicants count is selected from the Manage Requisitions page in Production and Pilot portals, users will be redirected to a filtered view of **Manage Candidates** instead of Manage Applicants. Support for defects related to Manage Applicants will also stop at this time.

Manage Candidates is a one-stop-shop for recruiters to effectively and efficiently manage candidates throughout the hiring process. Manage Candidates provides a modern UI (user interface) and additional actions and details available to recruiters that Manage Applicants doesn't. This change provides a better user experience by centralizing all the essential actions recruiters need to take from one page, rather than navigating to multiple pages.

Hiring Dashboard and Review Applicants

The Hiring Dashboard and Review Applicants pages will continue to link to Manage Applicants in Production and Pilot portals. Enabling or disabling the Manage Requisitions redirect to Manage Candidates will not affect the Hiring Dashboard or Review Applicants pages.

Permissions Enhancements - April '21 Release

As part of the transition, Manage Candidates will be enhanced to respect the permissions that are currently available on Manage Applicants. Enhancing permissions ensures that customers will have a smooth transition without concerns about security and access.

The following permission changes are included in the April '21 release:

o The Requisition: Owner or Requisition: Manage permissions are no longer required to access Manage Candidates
o Adding support for permissions that are not currently checked on the Manage Candidates page to appropriately limit the actions presented to users

Feature Activation Preferences - Enable/Disable the Redirect - April '21 Release

As part of the April '21 release, a Manage Candidates Default feature will be added to Feature Activation Preferences. This feature will be on by default and enables the redirect to Manage Candidates from Manage Requisitions in Production and Pilot portals.

However, if the redirect to Manage Candidates impedes your recruiting practices, then you will be able to disable this feature by turning the toggle to Off in Feature Activation Preferences. When turned off, clicking the Applicants count from the Manage Requisitions page in Production and Pilot portals will open Manage Applicants instead of Manage Candidates.

Enhanced Date Support for Offer Letters

Prior to this enhancement, the numeric format of dates in offer letters resulted in hiring challenges, payroll errors, legal issues, and candidate confusion. The date appeared in numeric format (04/05/2020) and was localized based on the person viewing the offer letter. Issues occurred when the localized date format of the recruiter who created the offer letter was different than the date format of the candidate.

The following workflow occurred *prior* to this enhancement and shows how the date format changed depending on the localization of the date for the recruiter and candidate:
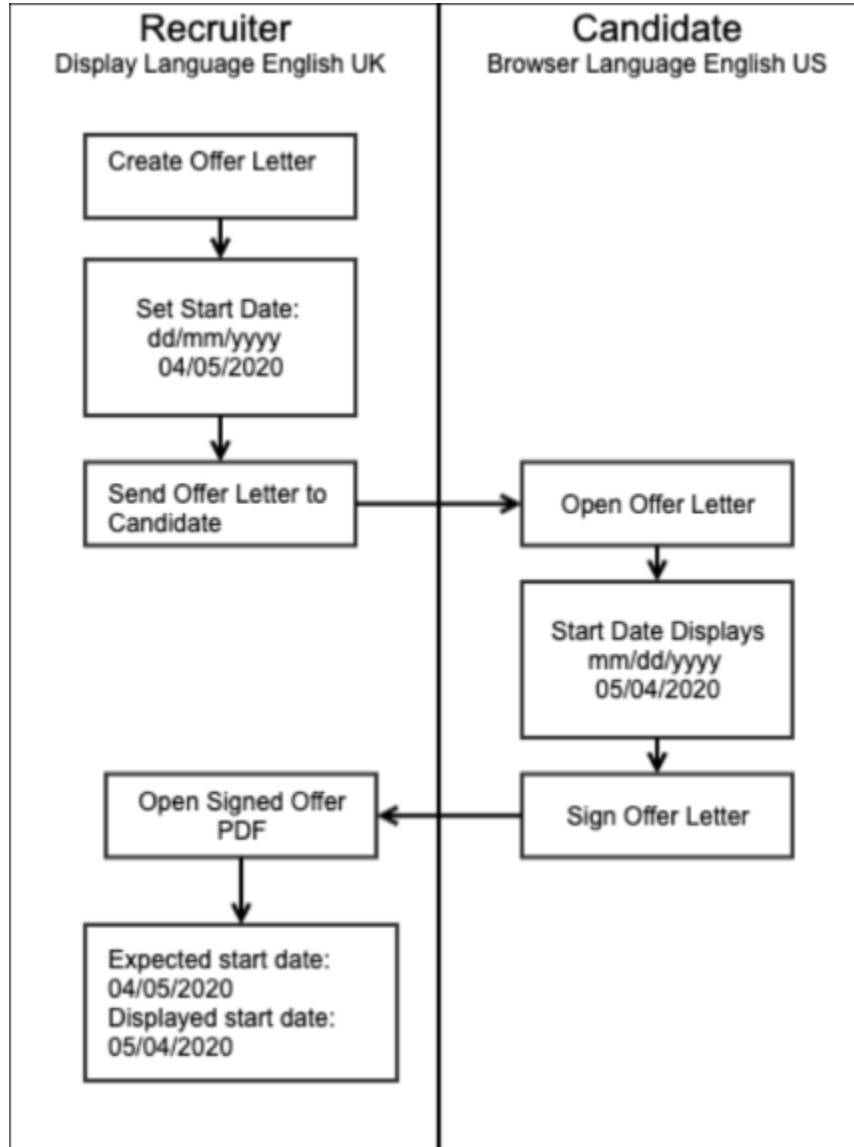
With this enhancement, all dates on the offer letter will now appear in alphanumeric format. The date will also be in the localized format of the person who created the offer letter.

Applicable Offer Letter Tags with Dates

For recruiters and candidates and for legal purposes, it is important that all dates on the offer letter accurately reflect the intended offer letter dates as defined by the recruiter. The following tags that can be included when creating an offer letter will now appear in alphanumeric format to ensure date accuracy:

- ACTION.DATE
- APPLICANT.STATUS.CHANGE.DATE
- APPLICATION.DATE
- JOB.COMPENSATION.RANGE.MAX
- JOB.COMPENSATION.RANGE.MIN
- JOB.OPENINGS.NUMBER
- JOB.TARGET.HIRE.DATE
- OFFER.BONUS
- OFFER.DATE
- OFFER.HOURLY.RATE
- OFFER.LABOR.HOURS
- OFFER.PAY.CYCLE
- OFFER.SALARY
- OFFER.START.DATE
- RECIPIENT.PHONE

Implementation

Upon implementation, this enhancement is available for all portals using Recruiting.

Permissions

The following existing permissions apply to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Offer Letter Template Management - Manage	Grants ability to access and manage Offer Letter Template Management. This permission can be constrained by OU and User's OU. Creator constraints apply. This is an administrator permission.	Recruiting Administration
Offer Letter Template Management - View	Grants ability to access and view Offer Letter Template Management. This permission can be constrained by OU and User's OU. Creator constraints apply. This is an administrator permission.	Recruiting Administration

Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	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

GDPR Enhancements

Prior to these enhancements, gaps in data deletion and anonymization events caused certain candidates to remain in the system indefinitely without being anonymized or deleted.

As part of the February '21 release, the following enhancements are made to assist with Global Data Protection Regulation (GDPR) compliance:

o **Candidates in an active status in a Canceled requisition will become eligible for data deletion.** Prior to this enhancement, candidates in an active status in a Canceled requisition remained in the system indefinitely. The only way for these candidates to become eligible for data deletion was by dispositioning them. With this enhancement, candidate data is deleted based on the retention period and when the requisition was canceled. This will delete the applications only and not the user record. The candidates will still be searchable, but the applications will be deleted.

o **Former employees will not be able to anonymize their own profile.** Prior to this enhancement, only former employees with a hired application (meaning the employee applied to a job at their former organization and was hired) were prevented from self-anonymizing via the **Deactivate and anonymize My Profile** option on the **My Profile page of the career site**. With this enhancement, all former employees will be prevented from self-anonymizing from the career site. This covers use cases in which a former employee may have been added as an employee in another way, such as through a data load. The ability to self-anonymize is controlled by the **Allow applicants to anonymize their own profiles** option in **Compliance Enablement Preferences**; however, there is no preference that controls this specific former employee use case. Data deletion features based on retention period may still anonymize this data.

Note: A requisition that is in a Cancelled status means the requisition was cancelled manually because it was determined that the position would never be filled. A requisition that is in a Closed status means the requisition was closed by the system because a candidate was hired for the position.

Implementation

Upon implementation of this enhancement, this functionality is available for all portals using Recruiting.

Customers are recommended to review and update their privacy policy documentation to accurately reflect the current behavior.

Permissions

The following existing permission applies to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Compliance Enablement Preferences - Manage	Grants ability to access and manage Compliance Enablement Preferences. This permission can be constrained by OU and User's OU. This is an administrator permission.	Recruiting Administration

Internal Career Site - Display Hiring Manager

Internal Career Site - Display Hiring Manager - Overview

With this enhancement, the hiring manager can now be displayed in search results on the internal career site. The feature must be enabled by the administrator in **Internal Career Site Preferences**.

Use Case

Rosa is looking to transition from her current role at ACME and into a sales position. She has worked closely with the head of the enterprise sales team and knows she would be suited for a position on that team. She searches for sales jobs on ACME's internal career site and finds many open positions. She sees in the search results that the head of the enterprise sales team is the hiring manager for one of the positions and knows that this is relevant to her interests. She reviews the job details and applies to the job.

Implementation

Upon implementation, this functionality is available for all portals using Recruiting that have Internal Career Site enabled.

Permissions

The following permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Internal Career Site	Enables users to view the internal career site. Assigned by default to the default security role, System Administrator, Cornerstone Administrator, and the Recruiting Administrator.	Recruiting
Manage Internal Career Site Preferences	Grants access to set preferences for the Internal Career Site. Assigned by default to the System Administrator, Cornerstone Administrator, and the Recruiting Administrator. This is an administrator permission.	Recruiting

Internal Career Site Preferences

A **Display Hiring Manager in Search Results** option is added to the Job Search tab in Internal Career Site Preferences. This option is off by default. When this option is on, the hiring manager's name displays in the search results on the internal career site if the hiring manager is defined on the **General tab of the requisition**.

To access Internal Career Site Preferences, go to ADMIN > TOOLS > RECRUIT > INTERNAL CAREER SITE PREFERENCES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Manage Internal Career Site Preferences	Grants access to set preferences for the Internal Career Site. Assigned by default to the System Administrator, Cornerstone Administrator, and the Recruiting Administrator. This is an administrator permission.	Recruiting

Internal Career Site - Hiring Manager in Search Results

With this enhancement, the hiring manager can now be displayed as a column in the search results on the internal career site. The feature must be enabled by the administrator on **Internal Career Site Preferences**.

Note: It may be necessary to scroll to see additional columns, such as Date Posted.

Internal Career Site - Display Referral Link

With this enhancement, the referral link now displays on the Refer a Candidate flyout. Users can copy the link and use it to refer the candidate via mediums other than email, such as social media platforms.

When candidates apply to a job via the copied referral link, they will follow the same referral process as referrals that are sent via email. However, sharing the referral link on a social media platform does not add an entry to the My Referrals page unless a candidate applies via the link.

Use Case

An artist who works at a film company has a significant following on a social media platform. Whenever she becomes aware of new art production jobs, she shares them with her followers. She finds a new job on her organization's internal career site and copies the link from the Refer a Candidate flyout. She pastes the link into a new post on social media. Two of her followers apply to the job, and she can track their referral progress on her My Referrals page.

Implementation

Upon implementation, this functionality is available for all portals using Recruiting. Internal Career Site must be enabled in the portal, and the **Enable Referrals** feature must be set to On in **Internal Career Site Preferences**.

Permissions

The following permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Internal Career Site	Enables users to view the internal career site. Assigned by default to the default security role, System Administrator, Cornerstone Administrator, and the Recruiting Administrator.	Recruiting

Olivia, Your AI Recruiting Assistant - Integration by Paradox

Note: *This feature was released as part of the 18 December 2020 patch, and the tile was made available in Edge Marketplace on 21 December 2020.*

The Olivia integration by Paradox is an FAQ and scheduling powerhouse, pipeline builder, and real-time, mobile-first communication tool. The widget can be placed on a career site for candidates to interact with through an ontology specific to your organization.

The job search integration allows for Paradox to provide requisition information to candidates while searching for a job through a chat. Olivia can guide the candidate through an assisted conversation to search for a job that they are interested in. Through an integration with Cornerstone, Olivia can proactively look up jobs in Cornerstone through the job requisition API and display information on the job to the candidate.

Implementation

The Olivia integration by Paradox is available via **Edge Marketplace** for all organizations using the Recruiting suite and the Job Requisition API and that also have an account with the integration vendor.

Additional instructions for enabling and configuring the integration are available on the **Setup tab of the integration in Edge**. There is no additional cost associated with enabling this integration in Edge.

Permissions

The following existing permissions apply to this functionality:

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

Phenom Talent Experience Integration (TXM)

Note: *This feature was released as part of the 8 January 2021 patch.*

The TXM integration gives mutual customers the benefit of two integrations:

o Job-Sync - The Job-Sync integration facilitates the extraction of requisitions from Cornerstone to Phenom for the purposes of job searching and recruiting scenarios. Upon the creation and publishing of a requisition in Cornerstone, the job will be extracted and posted to the front end of the Phenom platform. Customers need to purchase Phenom's software for this integration to work. There are no sample workflows to document as this integration is automated. Any requisition published from Cornerstone will be published on the Phenom platform.

o Hiring-Status - The Hiring-Status integration facilitates the extraction and submission of candidate and status details to ensure the correct updated status is reflected in both systems. This sync allows recruiters working in both Cornerstone and Phenom to update candidate statuses and ensure the correct updated status is reflected in both systems. Customers need to purchase Phenom's software for this integration to work. There are no sample workflows to document as this integration is automated. Any status change within either Phenom or Cornerstone will trigger a change in the other system.

Implementation

The TXM integration was made available on 11 January 2021 via **Edge Marketplace** for all organizations using the Recruiting suite and that also have an account with the integration vendor.

Additional instructions for enabling and configuring the integration are available on the **Setup tab of the integration in Edge**. There is no additional cost associated with enabling this integration in Edge.

Permissions

The following existing permissions apply to this functionality:

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

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

Reporting Fields - Recruiting

With this enhancement, new Referral fields are added to Reporting 2.0 to help customers determine referral bonus eligibility and better understand how employees use the referral program.

The following new fields are added:

- o **Referrer Email** - This field displays the email address of the employee who submitted the referral.
- o **Referral Date** - This field displays the date the referral was sent to the candidate. For email referrals, this field reflects the date that the email referral was sent to the candidate from the Refer a Candidate flyout. For referrals made using the referral link newly available on the Refer a Candidate flyout with the February '21 Release, this field reflects the date when the Referral Link was generated, if the referral was not submitted via the Send Email action on the flyout. ***Note:*** *This is not the date that the referral application was submitted by the candidate.*
- o **Referrer Related to Candidate** - Displaying a "Yes" or "No" value, this field indicates whether the employee indicated they are related to the candidate they referred when using the Refer a Candidate feature in the internal career site. If the referral was not made using the referral feature in the internal career site, then this field will be blank.

Implementation

Upon implementation, this enhancement is available for all portals using Reporting 2.0.

Permissions

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

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

Share Anonymized Candidates When Requesting Feedback

Share Anonymized Candidates When Requesting Feedback - Overview

Prior to this enhancement, hiring managers were unable to review an anonymized version of a candidate's resume and application unless the candidate was in a New Submission status. This made it challenging for recruiters to move candidates through the recruiting process, while simultaneously collecting feedback in a way that reduced unconscious bias.

With this enhancement, the Request Feedback feature on Manage Candidates is updated to allow candidates to be shared in an anonymized state with hiring managers and business stakeholders. This enables candidates to be reviewed solely on their skills, experience, and certifications in an effort to reduce the possibility of bias based on a candidate's name, gender, or location.

How Does This Enhancement Benefit My Organization?

o Recruiters can get unbiased observations about a candidate's skills, experience, and certifications
o This feature is a tool to help reduce unconscious bias and create a more diverse workplace

Use Case

A recruiter at ACME is hiring an account manager. The recruiter has just interviewed five candidates and wants to share them with the hiring manager. Each candidate is in a First Phone Interview status. To reduce the chance that the hiring manager's unconscious bias impacts their feedback, the recruiter decides to anonymize all candidates before requesting feedback. When the hiring manager clicks the link to review the shared candidates, each candidate's name is replaced with a number and all personal information is redacted from their resumes.

Implementation

Upon implementation, this enhancement is available for all portals using Recruiting.

Request Candidate Feedback - Anonymize Applicants

With this enhancement, an **Anonymize applicants** option is added to the Request Candidate Feedback flyout. When the option is checked:

o The candidate's name is replaced with a number, and all personal information is redacted from their resume on the candidate cohort page. ***Note:*** *The anonymized resume attachment may take a few minutes to generate after submitting the feedback request. If the user providing feedback sees an error on the resume attachment, they should wait a few minutes, then try again.*

o The candidate cohort page displays the candidate's name as a number.

o The word "Hidden" displays in place of the candidate's email address, phone number, and location.

o The candidate's name and contact information are omitted from the resume.

"View Resume" Renamed to "View Profile" on Manage Candidates

With this enhancement, the **VIEW RESUME** button on Manage Candidates is renamed **VIEW PROFILE**. The purpose of this update is to change the button name to a term that is more universally used and that communicates the functionality of the button more fully.

There are no functionality changes to the button. Clicking **VIEW PROFILE** will still display the candidate's resume details, pre-screening questions, comments, etc.

Use Case

1. Lucy is a recruiter at Acme Co. and is considering 10 candidates for a Sales role.
2. Lucy gathers some basic information about each candidate from the Manage Candidates table, but she would like to take a closer look at each to determine which candidates to disposition and which to move to the next stage in the hiring process.
3. Lucy selects the 10 candidates.
4. Lucy clicks **VIEW PROFILE**, which opens a more detailed view of each candidate, with the ability to gather additional information (comments, answers to pre-screening questions, etc.) and to take actions (change status, manage flags, etc.).

Implementation

Upon implementation, this functionality is available for all portals using Recruiting.

Visiotalent Assessment Integration

Note: *This feature was released as part of the 18 December 2020 patch, and the tile was made available in Edge Marketplace on 21 December 2020.*

The Visiotalent Assessment integration built by CleverConnect offers cloud-based on-demand and live video interview solutions to uncover a candidate's personality and soft skills while reducing your time-to-hire.

Implementation

The Visiotalent Assessment integration will be available on 21 December 2020 via **Edge Marketplace** for all organizations using the Recruiting suite and that also have an account with the integration vendor.

Additional instructions for enabling and configuring the integration are available on the **Setup tab of the integration in Edge**. There is no additional cost associated with enabling this integration in Edge.

Permissions

The following existing permissions apply to this functionality:

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