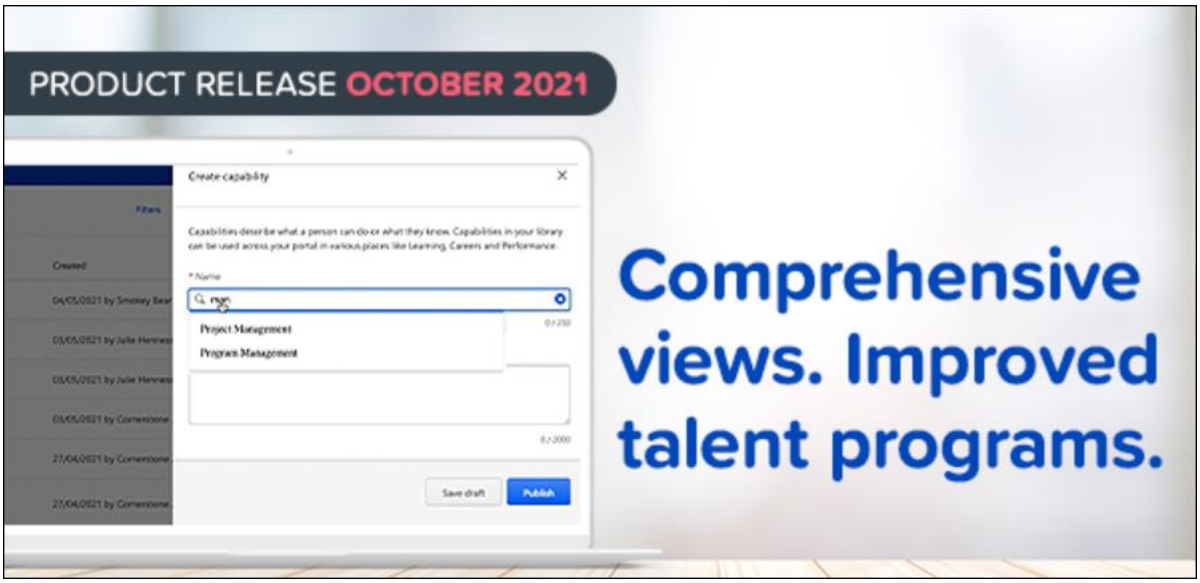


Cornerstone October 2021 Release Notes

Table of Contents

Release Notes for October 2021

What's New for October '21

The following release resources are available within Online Help:

- **Printable Release Notes** - This topic provides a printable version of all release notes content. *See Printable Release Notes.*
- **New and Enhanced Permissions** - This topic provides a list of all permissions that are newly added or modified with this release. *See* **New and Enhanced Permissions for October '21 Release** on page 18 *for additional information.*
- **New Reporting Fields** - This topic provides a list of all reporting fields that are newly added with this release. *See* **Master List of New Report Fields for October '21 Release** on page 21 *for additional information.*
- **Release Notes Updates** - This topic provides a complete list of all changes that have been made to the release notes. *See* **Release Notes Updates for October '21 Release** on page 22 *for additional information.*
- **Past Releases** - This topic contains links to past release overviews. *See Past Release Notes.*

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

The following new features and enhancements are available for the October '21 release:

Careers Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Easily Access Check-Ins on Mobile Devices	Yes	With this enhancement, mobile users can use the new **View Check-Ins** link on the home page to access the people bar to select a person and view the appropriate check-in.
Enhancement to Check-Ins People Search	Yes	With this enhancement, the **Include inactive users** checkbox is removed and inactive people who had check-ins with the user are now included in the relevant search results.
Enhancement to Goal Visibility in Check-Ins	Yes	With this enhancement, check-Ins participants can now view other participant's goals in the Check-Ins Goal Panel if they have the “View Goals” permission and can already access the employee's goals through other product areas.

Content Anytime Features

FEATURE NAME	DESCRIPTION
Content Anytime - Q4 Updates	Refreshes to Content Anytime and À La Carte subscriptions occur monthly between the first and second Friday of each month. New titles are added to libraries monthly, and removals occur quarterly. Content Anytime subscribers automatically receive these subscription refreshes. The target dates for Q3 refreshes are listed below. Please refer to the 2021 Content Refresh Schedule for the timing of refreshes for all of 2021. ○ October 1-8 (Additions only) ○ November 5-12 (Additions only) ○ December 3-10 (Additions and removals)

Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Capabilities Library and User Profile Bulk API	Yes, when using Bulk API	With the October ’21 Release, the same transactions, fields, and validations that exist with the Edge Import Capabilities Library and User Profile loads are now available as an API endpoint for custom integrations. Customers can retrieve the schema with request fields directly from the API. Transactions can be saved as “jobs” and are viewable through Edge Import.
Deprecation of Custom Reports in August 2022	Yes	As many of our customers have shared concerns about the upcoming deprecation of Custom Reports, Cornerstone has modified our Reporting 2.0 move-forward plans. Cornerstone understands that it may be a big shift for some organizations to migrate from Custom Reports to Reporting 2.0. As some organizations are also hit hard by COVID-19, we want to allow some extra time to get ready.
Deprecation of Learning Loads for Data Load Wizard (DLW) with the		Ability to perform learning data loads using Data Load Wizard will be deprecated with an end-of-life in the February ‘22 Release, defects will no longer be fixed, and DLW Learning Loads will no longer be visible or accessible in customer portals. DLW is a legacy data load tool which was built on older technology, is

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
February '22 Release		accessed using an older user interface, and experiences slow performance and limited load type support.
Deprecation of Reporting 2.0 Word and XML Export Formats with the May '22 Release	Yes	Word and XML report export formats are being deprecated with the May ’22 Release as part of the larger initiative to deprecate the use of SSRS. With the October ’21 Release, defects for these report formats that are not P1 will not be fixed. Customers exporting/downloading their Reporting 2.0 reports in Word and/or XML formats are encouraged to switch to any of the other available formats in advance of the May ‘22 deprecation.
Deprecation of Users and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) with the May '22 Release		Ability to perform Users and OU data loads and feeds using Data Load Wizard (DLW) will be deprecated with an end-of-life in the May ‘22 Release. End-of-support will occur in the February ‘22 Release and support for defects related to DLW Users and OU loads and feeds will stop at this time.
Edge Import - Allow Import for Training Included in Certifications (ILT Transcript Load)	Yes, when using Edge Import	With this enhancement, if a training is part of a certification, it is supported when included in the ILT Transcript loads. Completed statuses add credit to learners’ certifications, and other statuses are also reflected in learners’ certifications.
Edge Import - Capabilities Library and User Profile Feeds	Yes, when using Edge Import	With this release, Edge Import now supports recurring feeds for Capabilities Library and User Profile loads. Customers who have a library of skills and employee profiles in another HR system and wish to synchronize this data with Cornerstone can now set up a recurring feed to process these loads on a schedule so they can leverage employee skills data for learning and development. Customers who are already using Edge Import to load their capabilities automatically get access to the feed functionality as well.
Edge Import - Employee & OU	Yes, when using Edge Import	This enhancement provides increased functionality to the Employee and OU loads to support a wider range of customer’s bulk upload needs.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Loads Enhancements		
Edge Import - Japanese Localization for Learning Loads	Yes, when using Edge Import	With the Oct '21 release, the Edge Import user interface (UI) for learning loads and feeds is localized for the Japanese language. Portals with the Japanese language pack installed in their portal will benefit from this enhancement.
Edge Import - Learning Feeds	Yes, when using Edge Import	With this release, Edge Import includes the ability for customers to set up and execute manual and automated feeds for importing learning data.
Edge Import - Learning Load Enhancement (ILT Events and ILT Sessions Loads)	Yes, when using Edge Import	With this enhancement, administrators can update the provider for existing events via the Edge Import ILT Events load when the **Enable to change provider for events. (Will apply to Events created in the past.)** option is selected in ILT Preferences. This enhancement also allows for provider selection when creating new sessions via the Edge Import ILT Sessions load if the **Enable to select provider when creating sessions.** option is selected in ILT Preferences.
Edge Import - Learning Load Enhancement (ILT Sessions and Session Parts Loads)	Yes, when using Edge Import	With this enhancement, a new configuration question, **Should "system default" emails be sent for applicable sessions?**, is available for ILT Sessions and Session Parts loads in Edge Imnport.
Edge Import - Learning Load Enhancement (Online Course Transcript and Material Transcript Loads)	Yes, when using Edge Import	With this enhancement, online course and material transcript records can be updated from “In progress” to “Complete” using Edge Import.
Edge Import - Learning Load Enhancement (Test Transcript Load)	Yes, when using Edge Import	With this enhancement, transcript records for Test loads can be uploaded using Edge Import when they are in a Registered status.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Edge Import - Learning Load Enhancements (Transcript Loads)	Yes, when using Edge Import	With the October '21 release, additional functionality has been added to Edge Import for Transcript loads to help improve the administrator experience.
Edge Import - New Learning Load Type (Evaluation Question Bank Load)	Yes, when using Edge Import	The new Evaluation Question Bank load for Edge Import allows customers to create new evaluation questions and update existing evaluation questions, which can be used in Evaluation Administration when creating evaluations. The data loaded will be visible in the portal's question bank for evaluations, which is accessible via Evaluation Administration.
Edge Import - Performance Review Data Load	Yes, when using Edge Import	A new Edge Import data load is now available for performance reviews. This data load is a simple self-service solution for importing overall performance review scores and performance review PDFs. Organizations save time and effort by managing their own performance review data instead of relying on Cornerstone or Partner resources and custom projects.
Edge Import - Single Tile in Edge Marketplace for All Loads and Feeds	Yes, when using Edge Import	With this enhancement, all Edge Import product solutions have been consolidated into a single tile in the Edge Marketplace, which simplifies the Edge Import purchasing and enablement process for administrators. Now, customers can access the single Edge Import tile in the Edge Marketplace to initiate the purchase of all the available loads and feeds at one time.
Employee API v2 Constraints	Yes, when using Employee API v2	This enhancement enables customers to begin to constrain Employee API v2 access in the API as it is in the user interface. This enables customers to use Cornerstone's APIs in a more robust way, by enabling third-party integrators who are outside of their organization and should not otherwise have root access to all employee data, to be able to leverage the data they need for their solutions.
Fall 2021 - New Skills Graph Languages	Yes	With this enhancement, additional languages are now supported when searching for skills.
Improvements to Suggested	Yes	With this release, the following enhancements are now included when suggesting skills on the Skills Profile:

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Skills on Skills Profile		○ The Suggested Skills algorithm is updated to return more related skills based on the skills the user has already added. ○ The Suggested Skills refresh frequency is increased from once per 24 hours to once per 15 minutes.
Microsoft Azure Active Directory (AD) One-Click Single Sign-On (SSO) Enhancement	Yes, when using the integration	This enhancement streamlines the process of setting up the Microsoft Azure Active Directory One-Click Single Sign-on integration by automating the step in the enablement process to add a new claim. Prior to this enhancement, administrators had to manually map the unique identifiers when adding a new claim between Cornerstone OnDemand and Microsoft Azure. With this enhancement, after a token is generated, administrators can select which identifier to use for adding a new claim.
New Standard Report - Login Report	Yes	With this enhancement, a new Login Report is available in all portals as a standard report so that customers can report on which users have logged in to the portal and when. With this report, it is possible to report on who has logged in during a specific date range, their IP address, and details on how they logged in (e.g., SAML SSO). This report also enables organizations to report on logins that occurred prior to the release of this report.
New Standard Report - Proxy as User Report	Yes	With this enhancement, a new Proxy as User Report is available in all portals as a standard report so that customers can report on which users have proxied in, as what user, and when. This report also enables organizations to report on proxy as user events that occurred prior to the release of this report.
October '21 Language Pack Updates	Yes	New updates to Cornerstone Language Packs and additional languages, are available with the October '21 Release. Please visit the **October '21 Language Pack Updates posting** in the Success Center to review the full list of changes and their targeted availability in stage and production environments. This functionality is not available at the start of UAT.
Online Help Color Refresh	Yes	With this enhancement, Cornerstone Online Help is updated with a new color scheme.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		This functionality is not available during UAT.
Reporting 2.0 - Additional Fields	Yes	Additions and updates are made to reporting fields with the October '21 release. See the following topics in Online Help for descriptions of the new fields: ○ New Reporting 2.0 Fields in Learning - *See* **Reporting Fields - Learning** on page 229 *for additional information.* ○ New Reporting 2.0 Fields in Performance - *See* **Reporting Fields – Observation Checklists** on page 261 *for additional information.*
RTDW Updates to Reporting API, RDW, and Data Exporter	Yes	Impacting only customers using Reporting API, Replicated Data Warehouse (RDW), Data Exporter API, 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.
Search the Skills Graph	Yes	With this enhancement, administrators can now search for any skill and import it into their organization's Capabilities Library. When creating a skill, an auto-complete drop-down suggests skills from the Skills Graph and helps identify any duplicates that are already in the portal's library. Once a skill is imported, the description is displayed as a preview and can be modified at any time for clarity or to align with an organization's communication style. Administrators are free to ignore suggestions and can create custom skills.
Skill Feedback - Request Others to Rate Themselves + Other Enhancements	Yes	With this enhancement, the skills feedback experience is enhanced with new templates and updates to the feedback template administrator experience.
Transcript and Task API Constraints	No, organizations must contact Global	This enhancement enables customers to constrain Transcript and Task API access in the API as it is in the system. This enables customers to use Cornerstone's APIs in a more robust way, by enabling third-party integrators who are outside of their organization and should not otherwise have root access to all employee

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
	Customer Support	data, to be able to leverage the data they need for their solutions. Support for constraints should allow for tighter controls around employee data when using Transcript and Task API.
"User Skill" Fields in Data Exporter and Data Explorer API	Yes, for organizations using Data Exporter or Data Exporter API	With this enhancement, User Skill reporting fields made available in Reporting 2.0 are now available to use in the Data Exporter and Data Exporter API.

Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Workflow Engine (Early Adopter)	N/A	Workflow Engine is a new process orchestration platform that is the foundation for process management across all Cornerstone talent suites and external integrations.

Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Ability to Resubmit a Stuck Roster	Yes	With this enhancement, administrators and instructors can unstick a roster that has been stuck processing for more than 24 hours, via a new pop-up available on the Submit Roster page. The administrator or instructor can refresh the page using the pop-up and then resubmit the roster using the **SUBMIT** button.
Accept Progress for Online Content Launched Externally	Yes	With this enhancement, all progress data for online content launched directly from an integrated provider's site is automatically recorded to the learner's Cornerstone transcript and within Cornerstone reporting functionality, just as if they had launched the course from within the Cornerstone system. The progress data will match the data provided by the content

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		provider's site. Consequently, this enhancement allows for real-time progress data visibility in a single system of record.
Ability to Remove Training for Managers	Yes	With this enhancement, managers can be granted the ability to remove training they assigned to their employees from their employees' transcripts. These abilities are permission-based.
Audit Trail Enhancements (Early Adopter)	Enabled by Request	In February 2020, Cornerstone released an audit trail solution for a limited number of customers. This solution added additional fields to training and transcript auditing and provided a PDF export solution to display these training and transcript audits. With the October '21 release, this Early Adopter solution is being made available to more customers, with some feedback-based improvements. These audit trail enhancements, which allow administrators to track changes to training and transcripts via exportable reports, are beneficial to organizations in regulated industries where detailed training tracking is needed. Included with this enhancement: ○ Ability to track instructor-led training (ILT) ○ Ability to capture training active status changes in audit reports ○ Ensuring user information is consistent in reports ○ Ensuring changes in training active status appear consistently
Curriculum Versioning Enhancement - Removal of Appended Training	Yes	With the Oct ’21 release, a new setting has been added to Curricula Preferences, allowing administrators to set the default action for child training versioned with append versioning, at the time of its removal from the curriculum structure. Administrators can either opt to keep the child training as standalone training on the learner’s transcript or remove it from the learner’s transcript. In addition, a toggle for this setting controls whether this default value can be overridden at the curricula level at the time of the training removal.
Deprecation of Learning		Ability to perform learning data loads using Data Load Wizard will be deprecated with an end-of-life in the February ‘22

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Loads for Data Load Wizard (DLW) with the February '22 Release		Release, defects will no longer be fixed, and DLW Learning Loads will no longer be visible or accessible in customer portals. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface, and experiences slow performance and limited load type support.
Deprecation of the MS Lync Integration with the May '22 Release		Cornerstone is deprecating the Microsoft Lync Integration with the May ’22 Release. This integration is not currently available in Edge Marketplace and the Microsoft Lync product is no longer supported by Microsoft.
Improved Session Withdrawal Error Message		With this enhancement, if the user clicks the WITHDRAW.SESSION.LINK tag after the session has already started, or when session withdrawal has been restricted by the administrator via the **Restrict Withdraw from Session** option in the session details, the user will be navigated to the Withdraw Registration page and see a warning message stating, "You cannot withdraw from this session because it has already started or because withdrawal is restricted by an administrator. Click Cancel to return to your transcript." The **SUBMIT** button is hidden in these two circumstances, and the user can only click the **CANCEL** button.
Learning Assessments for Learn App (Open Beta)	Yes, with app update	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 Learning Assessments functionality has continued to evolve during subsequent releases. Upon the release of this enhancement, learners can access and complete assessments via the Cornerstone Learn app.
Learning Assessments (Open Beta)	Yes, with app update	The expansion of the Learning Assessments open beta continues with the addition of assessment versioning. Assessments can now exist in the following three states: ○ Draft ○ Current Version

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Enhancements		○ Older Version Two types of changes can be made to current versions of assessments: ○ Textual (does not require new version) ○ Structural (requires new version) In addition, a Question Bank for assessment questions will be made available, along with a Categories Home page. This functionality will allow administrators to create, manage, and categorize assessment questions which can be used in multiple assessments. This functionality will be made available during a post-release patch. Additional release documentation will be provided for these features at that time.
Maintain Completed Child Training Due Date During Curriculum Assignment	Yes	With this enhancement, when a completed child training item is reassigned via another curriculum or via the same curriculum, it is restored to the user's transcript with the correct due date. Administrators can view the due dates of reassigned completed child training on users' transcripts and in reporting.
Metadata Preservation for Content Subscriptions and Integrations	Yes	When an organization purchases a content subscription or integration, courses from the subscription or integration are automatically loaded into their portal via the Content Delivery System (CDS). These courses are added to the portal with pre-populated metadata, including the course title, description, and keywords. After a course has been loaded into a portal via the Content Delivery System, administrators can manually edit the course's metadata using the Course Catalog or Course Console. However, this capability can result in issues when content providers push metadata updates for their courses, as any metadata manually changed by an administrator will be overwritten by the automatic metadata updates from the provider. With this enhancement, organizations can opt to have automatic metadata syncs from content providers blocked,

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		which prevents manual metadata updates from being overwritten. Metadata update blocking is NOT turned on by default, but organizations can open a case to turn this feature on if they wish to protect their manually-updated metadata from being overwritten. This functionality as been delayed to the May 2022 release.
Prevent Over Assignment of Versioned Curriculum	Yes	This enhancement prevents the unintended overassignment of versioned materials and online courses in the following scenarios: The material or online course was versioned, and the **Assign To** option is set to **Users Assigned by Dynamic Assignment**. Then: ○ The versioned material or online course was contained within a curriculum that was assigned to the learner in the past, but the material or online course is no longer part of that curriculum, and the learner has already completed the material or online course. ○ A child material or online course contained within multiple curricula is assigned to a learner via different assignment criteria and the learner completes both curricula. If the learner is removed from one of the assignment criteria and the child training is versioned, the learner receives both curricula even though they are not part of all the assignment criteria anymore.
Preventing Personal Identifiable Information (PII) Transfer to Content Anytime Providers	Yes	With this enhancement, any data fields containing personal identifiable information (PII) will be communicated to Content Anytime providers with masked values, to prevent personal identifiable information from being transferred to providers. This update helps to facilitate General Data Protection Regulation (GDPR) compliance when transferring personal data from EMEA to the United States.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Remove Self-Requested Training	Yes	With this enhancement, learners can remove training items they self-requested from their transcripts using a new **Remove** option available on the Transcript page. Also with this enhancement, managers can be granted the ability to remove training they assigned to their employees from their employees' transcripts. These abilities are permission-based.
Reporting Fields - Learning	Yes	With this enhancement, the following new Learning field is available in Reporting 2.0: ○ Training ID Common Across All Versions Also with this enhancement, the following existing Learning field has been updated: ○ Transcript Delivery Method
Sanitizing HTML in Curriculum Fields	Yes	To provide a more secure experience, Cornerstone has made changes to several curricula administration fields. These updates include the following: ○ HTML text will be encoded in fields that do not support HTML ○ Fields will be validated for potentially problematic JavaScript
Save Email Settings in Learning Assignment Drafts	Yes	With this enhancement, when an administrator saves a learning assignment as a draft, any email settings configured for the draft assignment are saved. When the administrator edits the draft in the future, their email configurations will display in the same state they were saved in. The administrator can then continue editing the assignment's settings if desired and submit the assignment.
Standardize Curriculum Completion Date Logic Auto-Enabled	Yes	With this enhancement, the logic for the designation of curriculum completion dates has been standardized across various training completion scenarios in the Learning Management System (LMS). The general rule is that the date of curriculum completion will be the date the user completed the last child training item within the curriculum.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
with the October '21 Release		With the October '21 release, all portals will have the standardized curriculum completion date logic automatically enabled.
Training Removal Tool Enhancements	Yes	With the Oct '21 release, the following enhancements have been made to the Training Removal Tool: ○ Sessions can now be removed alongside their parent instructor-led training events ○ Users can be added to a training removal job via CSV upload ○ Previously-run training removal jobs are now grouped by job rather than by training ○ More transcript statuses are now available to select for a training removal job

Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Observation Checklist Date Fields Displayed in User's Time Zone	Yes	With this enhancement, the following Observation Checklists date fields are displayed in the time zone of the logged-in user when viewing these dates in a portal's UI: ○ Checklist Assignment Date ○ Checklist Completion Date ○ Checklist Validation Date
Reporting Fields – Observation Checklists	Yes	With this enhancement, the following Observation Checklist date fields displayed in the time zone of the person running the report: **Reporting 2.0** ○ Checklist Assignment Date ○ Checklist Completion Date

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		○ Checklist Validation Date **Standard Reports** ○ Checklist Assignment Date ○ Checklist Completion Date
Performance Reviews – Task Search Enhancements	Yes	With this enhancement, the **Show completed and expired tasks** check-box is replaced with the following filters: ○ Not Started ○ In Progress ○ Completed ○ Incomplete ○ Expired
Performance Reviews – Co-Planner Notification Enhancements	Yes	With this enhancement, review co-planners assigned by an administrator will now receive an email notification when a task is assigned to them. For co-planners without access to email, tasks will now display "Co-planner" at the end of task name for easy identification.
Performance Reviews -Review Comments Character Limit Increased	Yes	With this enhancement, the character limit for the **Comments** field in a performance review is increased from 10,000 to 30,000.00.

Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
CV-Library Apply Integration	Available in Edge Marketplace	CV-Library has integrated with Cornerstone to provide customers with applicant details directly in their Cornerstone Recruiting system, ensuring recruiters never miss a prospective candidate. CV-Library's ATS Apply automatically completes application forms and sends recruiters important candidate information, such as their curriculum vitae, directly from the candidate's CV-Library account, which will be recorded against the job in Cornerstone and source-tracked as coming from CV-Library. This feature was released as part of the 24 September 2021 patch. The tile was made available in Edge Marketplace on 27 September 2021.
Email on Manage Candidates (Early Adopter)	Self-enabled via **Feature Activation Preferences**	The Email on Manage Candidates feature is now available in Production and Pilot environments. This feature was first announced in the July '21 release. The additional availability of this feature was announced as part of the 24 September 2021 patch.
Hide Internal Employees in Candidate Search	Yes	With this enhancement, a **Hide Internal Employees in Candidate Search Query** option is added to the Compliance Preferences section in Requisition and Applicant Preferences. This option is unchecked by default. When checked, internal employees are excluded from the search in Candidate Search Query and the **Internal Employees** option is hidden in the **User Types** filter.

New and Enhanced Permissions for October '21 Release

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

New Permissions

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

Core/General

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Evaluation Question Bank Load	Grants access to the Evaluation Question Bank data load via Edge Import. This load type allows customers to create new evaluation questions and update existing evaluation questions, which can be used in Evaluation Administration when creating evaluations. This permission cannot be constrained. This is an administrator permission.	Edge Import
Edge Import - Load Review Scores and PDFs	Grants access to load performance review scores and PDFs via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Employee API - View - Constrained	Grants ability to use the Employee API v2 to view employee data with constraints. This permission can be constrained by OU and User's OU. The constraints on this permission limit what data is accessible via the Employee API v2. This is an administrator permission. With the February '22 Release, this permission can be constrained by User. This permission is only available when the Employee API v2 is enabled via Edge Marketplace.	Edge
Login Report	Grants access to the Login Report, which enables organizations to report on which users have logged in to the portal and when. This permission cannot be constrained.	Reports - System

Proxy as User Report	Grants access to the Proxy as User Report, which enables organizations to report on which users have logged in to the portal and when. This permission cannot be constrained.	Reports - System

User Ratings - Request Others to Provide Feedback on Themselves	Grants ability to request that someone rate themself. This permission is intended for administrators, managers, or other leadership roles. This permission cannot be constrained.	Core Administration

Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
CSV Bulk Training Removal - Manage	Grants administrators access to the **Remove by CSV Upload** option and workflow in the Training Removal Tool, which allows the administrator to add users to a training removal job via a CSV file. This permission cannot be constrained.	Learning - Administration
Remove Training - Directly Assigned	Allows a manager to remove directly-assigned training from their employee's transcript. This permission can be constrained by the following criteria: ○ User's Direct Subordinates ○ User's Direct Reports ○ User's Self ○ Employee Relationship ○ User's Subordinates ○ User Self and Subordinates ○ User's Defined OUs	Learning
Remove Training - Self Requested	Grants learners the ability to remove training that was self-requested from their active transcript and move it to the Removed tab of their transcript. This is an end user permission. This permission can be constrained by the following criteria: ○ User's Direct Subordinates ○ Direct Reports ○ User's Self	Learning

	○ Employee Relationship ○ User's Subordinates ○ User Self and Subordinates ○ User's Defined OUs	

Master List of New Report Fields for October '21 Release

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

Learning

FIELD NAME	SECTION
Training ID Common Across All Versions	Training

Release Notes Updates for October '21 Release

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

Changes made on 12 November 2021

Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Workflow Engine - Manage Navigation Tabs and Links	Workflow Engine - Manage Navigation Tabs and Links	Removed references to Mass Enrollment
Workflow Engine - Assign Workflows	Workflow Engine - Assign Workflows	Removed references to Mass Enrollment

Changes made on 2 November 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
New Standard Report - Proxy as User Report	New Standard Report - Proxy as User Report	Updated User Criteria to indicate that only individual users can be selected.

Changes made on 29 October 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Employee & OU Loads Enhancements	Edge Import - Employee & OU Loads Enhancements	Clarified that the Threshold Parameters feature only applies to non-Cornerstone HR customers. Added links to additional Online Help resources. Also, added information to the *Effective Dating User Records (HR Customers)* section.
New Standard Report - Login Report	New Standard Report - Login Report	Added additional information regarding the Impersonate User value in the report output.
October '21 Language Pack Updates	October '21 Language Pack Updates	Added additional languages as of October 20.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Audit Trail Enhancements (Early Adopter)	Audit Trail Enhancements - Generate Audit PDF	Added a list of training types and fields that are applicable to the Audit Trail PDF export.
Remove Self-Requested Training	Remove Self-Requested Training From Transcript	Added a list of common training request scenarios and clarified which scenarios allow users to self-remove training.

Changes made on 19 October 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Deprecation of Users and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) with the May '22 Release	Deprecation of Users and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) with the May '22 Release	Added the following note: Important: For customers utilizing Cornerstone's Recruiting Suite, Cornerstone does not recommend migration of Inbound Data Feed (IDF) for users and organizational units from Data Load Wizard to Edge Import at this time. An additional enhancement is planned for Edge Import that will allow for simplified migration and parity with Data Load Wizard for applicant conversion to employee. Stay tuned in the Release Community for updated notifications regarding this migration.
Edge Import - Employee & OU Loads Enhancements	Edge Import - Employee & OU Loads Enhancements	Added the following note: Important: For customers utilizing Cornerstone's Recruiting Suite, Cornerstone does not recommend migration of Inbound Data Feed (IDF) for users and organizational units from Data Load Wizard to Edge Import at this time. An additional enhancement is planned for Edge Import that will allow for simplified migration and parity with Data Load Wizard for applicant conversion to employee. Stay tuned in the Release Community for updated notifications regarding this migration.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
New Standard Report - Login Report	New Standard Report - Login Report	Clarified that the report permission cannot be constrained.
New Standard Report - Proxy as User Report	New Standard Report - Proxy as User Report	Clarified that the report permission cannot be constrained.

Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Workflow Engine (Early Adopter)	Workflow Engine (Early Adopter)	Added all task files for this feature.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Learning	Reporting Fields - Learning	Updated the Training ID Common Across All Versions field description to clarify the field behavior. Added information about what may cause the field to return a blank value.

Changes made on 11 October 2021

Careers

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Enhancement to Check-Ins People Search	Enhancement to Check-Ins People Search	Added: ***Note:*** *You cannot create Check-Ins with inactive users.*

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Learning	Reporting Fields - Learning	The new field previously described as "Parent Training Object ID" is actually named "Training ID Common Across All Versions." The Release Notes have been updated to reflect the correct field name of "Training ID Common Across All Versions."

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Hide Internal Employees in Candidate Search	Hide Internal Employees in Candidate Search	Added: ***Note**: Candidates with any application in a Hired status will continue to be searchable in Candidate Search Query until they become an internal employee on their start date.*

Changes made on 7 October 2021

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
New and Enhanced Permissions for October '21 Release	New and Enhanced Permissions for October '21 Release	New permissions are now displaying properly.
Skill Feedback - Request Others to Rate Themselves + Other Enhancements	Feedback Template Enhancements - Administrator Experience	Added an image. Added information on how existing templates are impacted by the new **How is feedback initiated** setting. Updated the **Instructions for Requestor** field name to **Description for Requestor**.
Skill Feedback - Request Others to Rate Themselves + Other Enhancements	Feedback Template - Request Someone to Rate Themself	Added an image. Updated the **Requestor Title** field name to **Template Name for Requestor**.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		Updated the **Requestor Instructions** field name to **Description for Requestor**. Updated the **Rater Title** field name to **Template Name for Rater**. Updated the **Rater Instructions** field name to **Instructions for Rater**.
Skill Feedback - Request Others to Rate Themselves + Other Enhancements	Feedback Template - Request Private Feedback	Added an image.
Skill Feedback - Request Others to Rate Themselves + Other Enhancements	Request Feedback	Updated the image.

12 November Patch Release Functionality

What's New for the 12 November 2021 Patch Release

The following is released along with the 12 November 2021 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	Microsoft Teams vILT Integration Enhancements	With this release, the following new features are available for the Microsoft Teams vILT integration: ○ Mark attendance based on time (%) present in virtual session ○ New "Application authentication" authentication model ○ Support for the "Organizer" role for instructors when using Application authentication ○ Support for Break Out rooms via the Organizer role when using Application authentication ○ Support for multiple Microsoft Teams tenants when customer has several Microsoft Team accounts
Recruiting	Hired Application Data Retention	This enhancement introduces the ability to define a retention period for hired candidate application data.

Learning

Microsoft Teams vILT Integration Enhancements

With this release, the following new features are available for the Microsoft Teams vILT integration:

- Mark attendance based on time (%) present in virtual session
- New "Application authentication" authentication model
- Support for the "Organizer" role for instructors when using Application authentication
- Support for Break Out rooms via the Organizer role when using Application authentication
- Support for multiple Microsoft Teams tenants when customer has several Microsoft Team accounts

Implementation

Administrators can enable and configure the Microsoft Teams vILT integration via the Edge Marketplace and Edge Integrate. Some prerequisite setup is required through your organization's Azure portal.

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
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

Events - Edit	Grants ability to edit/update existing 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
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
ILT Schedule Part Occurrence	Allows the admin to create more than one ILT session schedule part at the same time using a part occurrence schedule wizard. This is an administrator permission.	Learning - Administration
ILT Vendors - Create	Grants ability to create new training Vendors (Providers). This permission works in conjunction with the Vendors - View permission. This is an administrator permission.	Learning - Administration
ILT Vendors - Update	Grants ability to edit/update existing training Vendors (Providers). This permission works in conjunction with the Vendors - View permission. This is an administrator permission.	Learning - Administration
ILT Vendors - View	Grants view only access to instructor led training vendors (providers), via the ILT Vendors and Instructors screen. This is an administrator permission.	Learning - Administration
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor,	Learning - Administration

	User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	
Roster - View	Grants view-only access to instructor led training session rosters. This permission works in conjunction with Events - View and Sessions - View permissions. This permission can be constrained by Instructor, ILT Provider, User's ILT Provider, and User as Instructor. This is an administrator permission.	Learning - Administration
Sessions - Cancel	Grants ability to cancel instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission.	Learning - Administration
Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission. ***Note:*** *The "Restrict to User as Instructor" constraint is available, but it does not actually constrain the permission.*	Learning - Administration
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities	Learning - Administration

	Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.	
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.	Learning - Administration

Recruiting

Hired Application Data Retention

This enhancement introduces the ability to define a retention period for hired application data. When enabled, once the retention period is met, application data will be deleted.

Implementation

This functionality is off by default. Customers can set the retention period for hired application data by submitting a case to Global Customer Support.

17 December Patch Release Functionality

What's New for the 17 December 2021 Patch Release

The following is released along with the 17 December 2021 patch release:

MODULE	FEATURE	DESCRIPTION
Learning	Learning Assessments (Open Beta) Enhancements	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 Learning Assessments functionality has continued to evolve during subsequent releases. The expansion of the Learning Assessments open beta continues with the addition of assessment versioning. With this release, the following features have been added to the Learning Assessments (Open Beta): ○ **Question Bank** - *See* **Learning Assessments (Open Beta) - Question Bank** on page 41 *for additional information.* ○ **Categories Home** - *See* **Learning Assessments (Open Beta) - Categories Home** on page 44 *for additional information.*

Learning

Learning Assessments (Open Beta) Enhancements

Learning Assessments (Open 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 Learning Assessments functionality has continued to evolve during subsequent releases.

The expansion of the Learning Assessments open beta continues with the addition of assessment versioning. With this release, the following features have been added to the Learning Assessments (Open Beta):

- **Question Bank** - *See* **Learning Assessments (Open Beta) - Question Bank** on page 41 *for additional information.*
- **Categories Home** - *See* **Learning Assessments (Open Beta) - Categories Home** on page 44 *for additional information.*

This functionality will allow administrators to create, manage, and categorize assessment questions which can be used in multiple assessments.

Learning Assessment functionality is currently only available in Stage portals.

Implementation

Learning Assessments functionality is in an open beta status, and it 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.*

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning 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

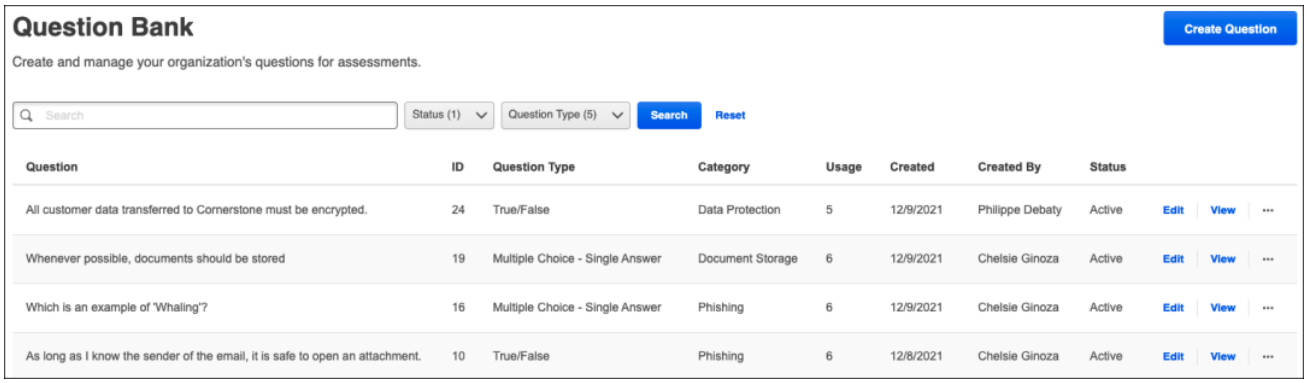
Learning Assessments (Open Beta) - Question Bank

The Question Bank is used to create questions which can then be added to one or more learning assessments during the creation process. Creating questions within the question bank allows administrators to save time when they need to add the same question to multiple assessments.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning 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



Question Bank

The following features are available on the Question Bank page:

- **Assessments** - Click the **Assessments** tab to navigate to the Assessments Home page, where you can create and manage learning assessments.
- **Question Categories** - Click the **Question Categories** tab to access the Categories Home page, where you can create and manage categories for learning assessments. *See* **Learning Assessments (Open Beta) - Categories Home** on page 44 *for additional information.*
- **Create Question** - click the **CREATE QUESTION** button to begin creating a new assessment question within the Question Bank.

- **Questions table** - If any questions have been created, they display in the Questions table. Administrators can use the search bar to search for a specific question if needed. If any questions have already been created, they display with the following information:
  - **Question** - This is the question text.
  - **ID** - This column displays the system-generated identification number for the question. This number cannot be defined by the administrator and cannot be edited.
  - **Question Type** - This column indicates the type of question, such as true/false, multiple choice, etc.
  - **Category** - This is the category selected for the question.
  - **Usage** - This column indicates the number of times the question is being used in a draft or published assessment.
  - **Created** - This is the date the question was created.
  - **Created By** - This is the first and last name of the user who created the question.
  - **Status** - This displays whether the question is active or inactive. To change the status of a question, you must edit the question and modify the Active checkbox setting. ***Note:*** *Making a question inactive does not remove it from assessments containing the question. Any inactive question is still visible within an assessment on the administrator and end user view. Inactivated questions can be removed from an assessment in the Assessment Builder.*
  - **Edit** - Click the **Edit** option to make edits to the question. If the question has been added to an assessment, the format of the question cannot be edited. You may modify the text to add clarity or correct errors, but you should not alter the meaning of the question, as this will affect the results.
  - **View** - Click the **View** option to view how the question will appear in an assessment.
  - **Delete** - Click the **Delete** option to delete a question. ***Note:*** *If the question has been added to an assessment, this option is not available. Questions that are being used in an assessment cannot be deleted from the Question Bank.*
  - **Copy** - Click the **Copy** option to make a copy of a question, which can then be modified to create a new question. Copying a question can help administrators save time when creating multiple similar questions.

Create Question

To add a question to the Question Bank:

1. Click the **CREATE QUESTION** button.
2. Populate the **Question** field with the question text.
3. Next, configure answer choices for the question. Depending on the selected question type, the following fields may be available:
   A. **Mark if Correct** - Select this radio button or checkbox if the choice is a correct answer to the question.
   B. **Answer Text** - Enter the text of the answer choice in this field.
   C. **Move Up/Move Down Arrows** - To move a choice up or down in the order, use the move up/move down arrows that display in the upper right of each choice tile.

   D. **Delete** - Click the trash can icon to delete a choice from the question.
   E. Add as many choices as necessary by continuing to click the **ADD CHOICE** button.
   F. For Text Only questions, select the **Ignore case when evaluating learner's answer** checkbox to ignore uppercase or lowercase differences in the learner's answer and the provided answer.
4. Select a category to associate the question with a category.
5. In the **Include Explanation** field, provide an explanation on why the selected answer is the correct choice. Learners can see this explanation upon reviewing a submitted assessment.
6. The **Active** checkbox denotes if the question is active or inactive.
7. Click the **SAVE** button to save your question and add it to the Question Bank.

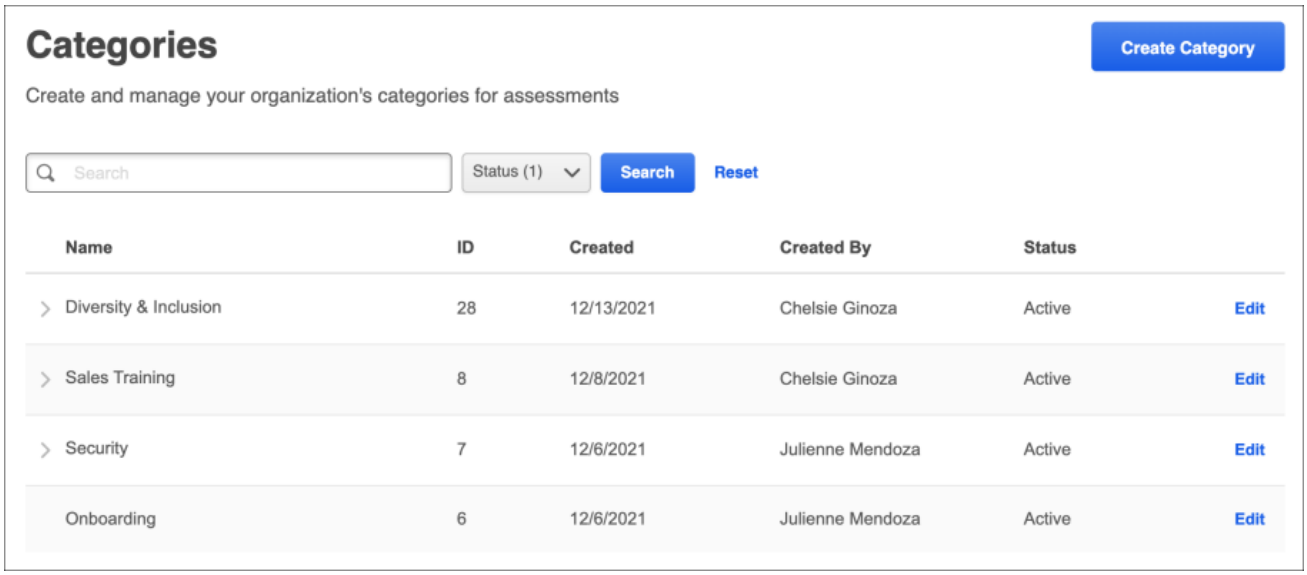
Learning Assessments (Open Beta) - Categories Home

Categories are a way to organize questions in the Question Bank for learning assessments. All existing categories display on the Categories Home page, and administrators can create and edit categories. Categories can also be organized into parent and child relationships to improve the organization of categories.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning 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



Categories

The following features are available on the Categories page:

- **Assessments** - Click the **Assessments** tab to navigate to the Assessments Home page, where you can view and manage assessments.

- **Question Bank** - Click the **Question Bank** tab to access the Question Bank for learning assessments, where you can view and manage assessment questions that can be added to assessments during the creation process. *See* **Learning Assessments (Open Beta) - Question Bank** on page 41 *for additional information.*
- **Create Category** - Click the **CREATE CATEGORY** button to create a new question category. Categories are used to organize assessment questions so administrators can easily find existing questions and understand the purpose of existing questions.
- **Categories table** - If any categories have been created, they display in the Categories table. Administrators can use the search bar to search for a specific category if needed. If any categories have already been created, they display with the following information:
  - **Category Name** - This is the name the administrator created for the category. If there is a ">" next to a category name, this signifies that the category is a parent category. A category supports five levels of nesting.
  - **ID** - This column displays the system-generated identification number for the category. This number cannot be defined by the administrator and cannot be edited.
  - **Created** - This is the date the category was created.
  - **Created By** - This is the first and last name of the user who created the category.
  - **Status** - This displays whether the category is active or inactive. To change the status of a category, you must edit the category and modify the Active checkbox setting. ***Note:*** *Making a category inactive also inactivates any child categories and questions associated with the category. Any inactive question is still visible within an assessment on the administrator and end user view. Inactivated questions can be removed from an assessment in the Assessment Builder.*
  - **Edit** - Click the **Edit** option to modify the category.
  - **Delete** - Administrators can click the **Delete** option to delete a category from Categories Home. ***Note:*** *If a question has been added to a category or the category is a parent category, the Delete option is not available.*

If no categories have been created yet, the phrase "Create your first category" displays on the Categories main page, along with a **CREATE CATEGORY** button.

Categories display in the order they were created, with the newest categories displaying at the top of the page.

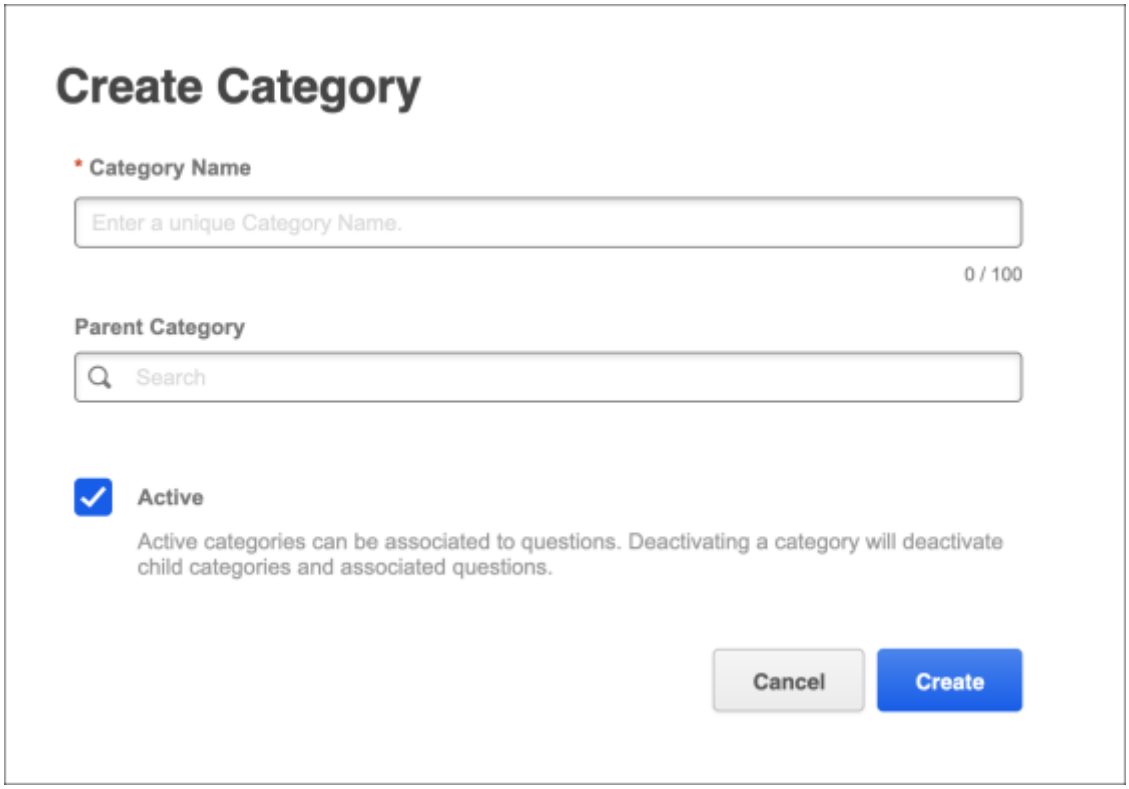
Create Category

After clicking the **CREATE CATEGORY** button on the Categories Home page, the Create Category pop-up opens.

Enter a name for the category in the **Category Name** field. The same category name cannot be used more than once.

You have the option of associating the category to a **Parent Category**. This is not required. Categories support five levels of nesting.

Click **CREATE** to save the category and add it to the Categories Home page. To discard the new category without saving it, click **CANCEL**.


Create Category
* Category Name
Enter a unique Category Name.
0 / 100
Parent Category
Search
Active
Active categories can be associated to questions. Deactivating a category will deactivate child categories and associated questions.
Cancel
Create

Careers

Check-Ins

Goal Visibility

Prior to this enhancement, only a direct manager had access to an employee's goals from the Check-Ins Goals panel.

With this enhancement, Check-Ins participants can now view other participant's goals in the Check-Ins Goal Panel if they have the “View Goals” permission and can already access the employee's goals through other product areas, such as Snapshot view.

How Does This Enhancement Benefit My Organization?

Indirect and functional managers with appropriate permission can now access a subordinate's goals in Check-Ins.

Implementation

This feature is available to clients who purchased the Performance or Career suites and is already using Check-Ins.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Check-Ins - Create	Grants ability for the user to create and update Check-Ins. The permission constraints determine with whom the user can create Check-In discussions. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Subordinates, User's Direct Reports, User's Self, User's Manager, User's Superiors, and Employee Relationship. 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
View Goals	Grants ability to view own goals and (depending on role and settings) goals of others (manager's visible goals, direct subordinate's goals, company goals, division goals). This permission can be constrained by Employee Relationship, OU, User's OU, and User Self and Subordinates. This is an end user permission.	Performance

	Managers must have the Snapshot - Goals permission to view the Universal Profile - Snapshot page and the My Goals page for users within their permission constraints.	

Easily Access Check-Ins on Mobile Devices

Prior to this enhancement, mobile users were unable to easily access check-ins that are more than seven days in the past or future and had to rotate their device to landscape mode to view additional check-ins.

With this enhancement, mobile users can use the new **View Check-Ins** link on the home page to access the people bar to select a person and view the appropriate check-in.

Considerations

The **View Check-Ins** link is not visible if a user has no existing check-ins.

Implementation

This feature is available to clients who purchased the Performance or Career suites and is already using Check-Ins.

Permissions

The following existing permissions apply to this functionality:

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

Enhancement to Check-Ins People Search

Prior to this enhancement, when using the Check-Ins search feature to locate colleagues, selecting the **Include inactive users** check-box provided search results that included inactive colleagues the user never had check-ins with in the past.

With this enhancement, the **Include inactive users** checkbox is removed and inactive people who had check-ins with the user are now included in the relevant search results.

***Note**: You cannot create Check-Ins with inactive users.*

How Does This Enhancement Benefit My Organization?

All non-relevant inactive search results are excluded from search results.

Implementation

This feature is available to clients who purchased the Performance or Career suites and is already using Check-Ins.

Permissions

The following existing permissions apply to this functionality:

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

Content Anytime

Content Anytime - Q4 Updates

Refreshes to Content Anytime and À La Carte subscriptions occur monthly between the first and second Friday of each month. New titles are added to libraries monthly, and removals occur quarterly. Content Anytime subscribers automatically receive these subscription refreshes.

Target dates for Q3 Refreshes

The target dates for Q3 refreshes are listed below. Please refer to the 2021 Content Refresh Schedule for the timing of refreshes for all of 2021.

- October 1-8 (Additions only)
- November 5-12 (Additions only)
- December 3-10 (Additions and removals)

Visit and follow the **Content Anytime Topic in the Success Center** to stay up to date with the latest subscription refresh information for both Content Anytime and À La Carte subscriptions.

Core/General

Capabilities Library and User Profile Bulk API

With the October ’21 Release, the same transactions, fields, and validations that exist with the Edge Import Capabilities Library and User Profile loads are now available as an API endpoint for custom integrations. Customers can retrieve the schema with request fields directly from the API. Transactions can be saved as “jobs” and are viewable through Edge Import.

How Does this Enhancement Benefit My Organization?

For customers who want to build custom integrations, the new Capabilities Bulk API allows customers to load the same Capabilities Library and User Profile data as Edge Import using API calls instead of a CSV upload.

Considerations

The Capabilities Bulk API is designed to update one or more records at a time. For customers who want to read data, the same fields are provided through the Data Exporter API.

The Capabilities Bulk API is intended to facilitate larger, periodic updates to skills data in Cornerstone, but not real-time transactions. Cornerstone is looking in to possibly support real-time 2-way transactions in the future with a different transactional API.

Implementation

The Capabilities Bulk API is included with the Bulk API that is available in the Edge Marketplace. Additional documentation will be available in the API Explorer upon release of this new API. Edge Import must also be installed in a portal in order to use this API.

Deprecation of Custom Reports in August 2022

As many of our customers have shared concerns about the upcoming deprecation of Custom Reports, Cornerstone has modified our Reporting 2.0 move-forward plans. Cornerstone understands that it may be a big shift for some organizations to migrate from Custom Reports to Reporting 2.0. As some organizations are also hit hard by COVID-19, we want to allow some extra time to get ready.

- The Deprecation of Custom Reports has been delayed until the August ’22 Release.
- Our top priority is performance and stability. We will continue to monitor and improve this during 2021, specifically addressing page load times, page load errors, and failures to deliver/download reports.
- Once performance targets have been met, we will refocus our attention on closing the remaining parity gaps between Reporting 2.0 and Custom Reports.
- With the February ’22 Release, we will share more details about the deprecation process.
- 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.

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.

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

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

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 an end-of-life in the February ‘22 Release, defects will no longer be fixed, and DLW Learning Loads will no longer be visible or accessible in customer portals. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface, and experiences slow performance and limited load type support.

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

Existing customers who 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 customers are required to complete their migrations before the February ‘22 Release, which will be the end-of-life date and end-of-support for DLW learning data loads.

Deprecation of Reporting 2.0 Word and XML Export Formats with the May '22 Release

Word and XML report export formats are being deprecated with the May ’22 Release as part of the larger initiative to deprecate the use of SSRS. With the October ’21 Release, defects for these report formats that are not P1 will not be fixed. Customers exporting/downloading their Reporting 2.0 reports in Word and/or XML formats are encouraged to switch to any of the other available formats in advance of the May ‘22 deprecation.

Implementation

Upon implementation, this functionality is available in all portals with Reporting 2.0.

Permissions

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

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

Deprecation of Users and Organizational Unit (OU) Loads and Feeds for Data Load Wizard (DLW) with the May '22 Release

Ability to perform Users and OU data loads and feeds using Data Load Wizard (DLW) will be deprecated with an end-of-life in the May ‘22 Release. End-of-support will occur in the February ‘22 Release and support for defects related to DLW Users and OU loads and feeds will stop at this time.

DLW is a legacy data load tool which was built on older technology, is accessed using an outdated 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 customers who are ready to migrate to Edge Import will be able to enable Edge Import: Core on Edge Marketplace and review the migration and starter guides to help them through the migration steps. All customers are required to complete their migrations before the May ‘22 release which will be the end-of-life date for DLW Users and OU loads and feeds.

Important: For customers utilizing Cornerstone's Recruiting Suite, Cornerstone does not recommend migration of Inbound Data Feed (IDF) for users and organizational units from Data Load Wizard to Edge Import at this time. An additional enhancement is planned for Edge Import that will allow for simplified migration and parity with Data Load Wizard for applicant conversion to employee. Stay tuned in the Release Community for updated notifications regarding this migration.

Edge Import - Allow Import for Training Included in Certifications (ILT Transcript Load)

Prior to this enhancement, training that was included in a certification was not supported for Edge Import ILT Transcript loads.

With this enhancement, if a training is part of a certification, it is supported when included in the ILT Transcript loads. Completed statuses add credit to learners' certifications, and other statuses are also reflected in learners' certifications.

How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to include training tied to certifications in ILT Transcript loads.

Implementation

This functionality is automatically enabled for all organizations using Edge Import Learning loads.

Edge Import - Capabilities Library and User Profile Feeds

Prior to this release, Capabilities Library and User Profile loads in Edge Import were only manual and could not be scheduled.

With this release, Edge Import now supports recurring feeds for Capabilities Library and User Profile loads. Customers who have a library of skills and employee profiles in another HR system and wish to synchronize this data with Cornerstone can now set up a recurring feed to process these loads on a schedule so they can leverage employee skills data for learning and development. Customers who are already using Edge Import to load their capabilities automatically get access to the feed functionality as well.

How Does this Enhancement Benefit My Organization?

This enhancement creates a recurring synchronization of skills data from an external system into Cornerstone.

Select this link to download the Edge Import Capabilities Starter Guide.

Implementation

The ability to set up a feed for Capabilities Library and User Profile data is included with Edge Import and uses the existing permissions to access Edge Import and load capabilities.

Edge Import - Employee & OU Loads Enhancements

This enhancement provides increased functionality to the Employee and Organizational Unity (OU) loads to support a wider range of customer's bulk upload needs.

The October '21 Release introduces the following features:

- Non-Cornerstone Customers
  - Threshold Parameters for Auto-Inactivation of User Records
- Cornerstone HR Customers
  - Effective Dating User Records
  - Generating Advanced Audits
  - Auto-Generation of UserIds
  - Duplicate Record Detection
  - GUID Based Updates

Important: For customers utilizing Cornerstone's Recruiting Suite, Cornerstone does not recommend migration of Inbound Data Feed (IDF) for users and organizational units from Data Load Wizard to Edge Import at this time. An additional enhancement is planned for Edge Import that will allow for simplified migration and parity with Data Load Wizard for applicant conversion to employee. Stay tuned in the Release Community for updated notifications regarding this migration.

Threshold Parameters for Auto-Inactivation of User Records (Non-Cornerstone HR Customers)

When using Edge Import to update employee data, non-Cornerstone HR customers can customize the load configuration to inactivate any users who exist in the system but are not included in the import file.

Prior to this enhancement, the system allowed a maximum of 10% of all active users to be inactivated in bulk via Edge Import. If this threshold were exceeded, then the import is not processed.

With this enhancement, non-Cornerstone HR customers can customize this threshold to a lower or higher maximum value. To modify this threshold, contact Global Customer Support.

Effective Dating User Records (Cornerstone HR Customers)

With this enhancement, user record data loads can now include effective date details.

The new **Effective Date** and **Reason for Change (accepted on modification** fields are included in the data import template, which is available within Edge Import.

Generating Advanced Audits (Cornerstone HR Customers)

With this enhancement, when a user record is created or updated via Edge Import, the detailed modification history for the user record is captured in the user record's Modification History. *See User Record - Modification History.*

Auto-Generation of User IDs (Cornerstone HR Customers)

When using Edge Import to update employee data, organizations can customize the load configuration to identify users in the import file by their User ID or Global Unique Identifier (GUID).

With this enhancement, administrators can choose to automatically generate User ID values when creating new users via the Employee import type. The **What is the primary identifier?** setting is enhanced with a new User ID (with Auto-generation of IDs) option. When this option is selected, any user in the import file who does not have a User ID value is automatically assigned a system-generated User ID.

The User ID (with Auto-generation of IDs) option is only available for the **What is the primary identifier?** setting if the functionality is enabled via a backend setting. *See System Generated User ID.*

To enable this functionality, contact Global Customer Support.

Important: *The User ID (with Auto-generation of IDs option should be used with caution as duplicate user records may be created if the User ID value is inadvertently omitted.*

Duplicate Record Detection (Cornerstone HR Customers)

With this enhancement, the system calculates potential duplicate records based on the administrator-configured logic configured in Duplicate User Management Preferences. *See Duplicate User Management Preferences.*

The load or feed summary provides details about duplicate record occurrences, and administrators with the appropriate permissions can reconcile these records.

See Users - Potential Duplicate User.

GUID Based Updates (Cornerstone HR Customers)

Prior to this enhancement, only non-Cornerstone HR customers could identify users in the import file by their GUID.

With this enhancement, Cornerstone HR customers have the option to identify and update users based on their GUID.

Note: *The GUID cannot be used to create new records.*

Implementation

Available for customers that currently use Edge Import to load Employee and OU data. At release, the Template Guide for this load will also contain information to assist with load setup.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import
Duplicate User Management Preferences - Manage	Grants ability to access and configure management of duplicate records, including parameters used to prevent duplicates. This permission cannot be constrained. This is an administrator permission.	Core Administration
Prevent Duplicate Users - Reconcile	Grants ability to view user accounts that have been identified as potential duplicates. Administrators can only view pending user records that were created by administrators who are within the constraints on this permission. This permission can be constrained by OU and User's OU. This is an administrator permission.	Core Administration

Edge Import - Japanese Localization for Learning Loads and Feeds

With the Oct '21 release, the Edge Import user interface (UI) for learning loads and feeds is localized for the Japanese language. Portals with the Japanese language pack installed in their portal will benefit from this enhancement.

Please visit the **October '21 Language Pack Updates** posting to view their targeted availability in stage and production environments.

Implementation

This functionality is turned on by default for all Edge Import customers who have the Japanese language pack installed in their portal.

Edge Import - Learning Feeds

With this release, Edge Import includes the ability for customers to set up and execute manual and automated feeds for importing learning data.

Customers will find that setting up and maintaining learning feeds in Edge Import is a simple and intuitive experience. Targeted error handling with in-app support for troubleshooting is available to help resolve any issues that arise. Edge Import feeds include enhanced data integrity with support for in-file and cross-file concurrency and dependency resolution. In-app feedback is included to provide visibility into the status of post processing events.

The following feed types are supported:

- Curriculum
- Curriculum Structure
- ILT Events
- ILT Sessions
- ILT Session Parts
- Material
- Online Course Metadata
- Test
- Test Mapping
- Video
- Curriculum Transcript
- External Training
- ILT Transcript
- Material Transcript
- Online Course Transcript
- Test Transcript
- Video Transcript

How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to set up and schedule automated imports of training and transcript data using Edge Import.

Implementation

Customers who have Edge Import Learning loads enabled will have Learning feeds enabled by default. An in-app step by step guide with help text and examples for usage of specific features will be available at release.

Edge Import - Learning Load Enhancement (ILT Events and ILT Sessions Loads)

Prior to this enhancement, when using Edge Import ILT Events load type, it was not possible to update the provider for an event or select the provider for a new session, even if a portal was configured to allow this type of update.

With this enhancement, administrators can update the provider for existing events via the Edge Import ILT Events load when the **Enable to change provider for events. (Will apply to Events created in the past.)** option is selected in ILT Preferences. This enhancement also allows for provider selection when creating new sessions via the Edge Import ILT Sessions load if the **Enable to select provider when creating sessions.** option is selected in ILT Preferences. *See ILT Preferences - General.*

How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to bulk update ILT provider for events and select provider when creating sessions.

Considerations

- Providers are also referred to as vendors.
- If a portal is configured to support both primary and secondary providers for an event, then the ILT Events load will also support updating primary and secondary providers.
- Additional considerations can be found in this **Knowledge Article**.

Implementation

This functionality is automatically enabled for all organizations using the Edge Import Learning loads.

The corresponding ILT Preferences for this functionality must be enabled in order for the event provider to be updated and the session provider to be selected during session creation. The Template Guide for these loads will also contain information to assist with load setup.

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

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

Edge Import - Learning Load Enhancement (ILT Sessions and Session Parts Loads)

Prior to this enhancement, system default emails were not sent for sessions and session parts loaded via Edge Import.

With this enhancement, a new configuration question, **Should "system default" emails be sent for applicable sessions?**, is available for ILT Sessions and Session Parts loads in Edge Imnport.

When the **Should "system default" emails be sent for applicable sessions?** setting is set to “Yes,” the following emails will fire for ILT Sessions loads if the emails are configured in the portal and the session is set up to use “System Default” emails:

- ILT Session Becomes Available
- Registration Deadline
- Session Changed

When the **Should "system default" emails be sent for applicable sessions?** setting is set to “Yes,” the following emails will fire for Session Parts loads if the email is configured in the portal and the session is set up to use “System Default” emails:

- Session Changed

The selected setting applies to all records in the upload file.

How Does this Enhancement Benefit My Organization?

This enhancement allows administrators to specify whether system default emails configured for the session should be sent.

Implementation

This functionality is automatically enabled for all organizations using the Edge Import Learning loads.

The radio button for the new configuration question is set to “No” by default. At release, existing saved template configurations will have this question set to “No” by default as well. The Template Guide for these loads will contain finalized list of emails supported with this enhancement.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

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 - Learning Load Enhancement (Online Course Transcript and Material Transcript Loads)

Prior to this enhancement, transcript records could not be updated from an “In progress” status when using Edge Import.

With this enhancement, online course and material transcript records can be updated from “In progress” to “Complete” using Edge Import.

Implementation

This functionality is automatically enabled for all organizations using the Edge Import Learning loads.

Permissions

The following existing permissions apply to this functionality:

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

Edge Import - Learning Load Enhancement (Test Transcript Load)

Prior to this enhancement, transcript records for Test loads could not be uploaded using Edge Import if the test was in a Registered status.

With this enhancement, transcript records for Test loads can be uploaded using Edge Import when they are in a Registered status.

Considerations

The **Score** field value is not applicable for the Registered test transcript status. If a **Score** field is provided in the Edge Import load, an error message will result for the record.

Implementation

This functionality is enabled by default for all Edge Import customers.

Edge Import - Learning Load Enhancements (Transcript Loads)

With the October '21 release, additional functionality has been added to Edge Import for Transcript loads to help improve the administrator experience.

Enable Emails to be Triggered for Trainings with Due Dates

Prior to this enhancement, "Training is Due" emails were not sent for transcript records loaded via Edge Import.

With this enhancement, the following new configuration question is available for Transcript loads:

- **"Should emails be triggered when due date is provided?"** - This question provides administrators with the flexibility to specify whether "Training is Due" emails configured for the training should be sent. When this question is set to **Yes**, the "Training is Due" email will be triggered as configured in the portal for training items that have been configured to use system default emails, and the due date provided in the load is a future date or today's date. The "Training is Due" email will also be sent if the due date provided in the load is a date in the past and the "Training is Due" email is expected to trigger within 24 hours from the date and time of the import.

Ability to Update from Approved Status

Prior to this enhancement, a registration date was required in order for Edge Import to locate and update the transcript record. It was not possible to update training on a learner's transcript using Edge Import when the training was in an Approved status.

With this enhancement, it is possible to update training in a learner's transcript when that training has no registration date or the training is in an Approved status.

Supported Load Types:

- Video Transcript
- Material Transcript
- Online Course Transcript
- Test Transcript
- Curriculum Transcript
- ILT Sessions
- External Training

Implementation

The radio button for the new "Should emails be triggered when due date is provided?" question is automatically available but is set to **No** by default. Following the release, existing saved template configurations will have this question set to **No** by default as well.

The ability to update from an Approved status is on by default. Additional instructions will be included in the template guide in Edge Import.

Edge Import - New Learning Load Type (Evaluation Question Bank Load)

The new Evaluation Question Bank load for Edge Import allows customers to create new evaluation questions and update existing evaluation questions, which can be used in Evaluation Administration when creating evaluations. The data loaded will be visible in the portal's question bank for evaluations, which is accessible via Evaluation Administration.

Considerations

The following considerations apply to this functionality:

- Evaluation question categories must already exist before loading evaluation questions.
- This new load type does not support the question banks used in Form Management or the Test Engine.

Implementation

This enhancement is enabled by default for all Edge Import: Learning Loads customers. Access to this new load type is controlled using the new *Access LMS - Evaluation Question Bank Load* permission. The Template Guide in Edge Import will contain additional information for this new load type.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - Evaluation Question Bank Load	Grants access to the Evaluation Question Bank data load via Edge Import. This load type allows customers to create new evaluation questions and update existing evaluation questions, which can be used in Evaluation Administration when creating evaluations. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - Performance Review Data Load

A new Edge Import data load is now available for performance reviews. This data load is a simple self-service solution for importing overall performance review scores and performance review PDFs. Organizations save time and effort by managing their own performance review data instead of relying on Cornerstone or Partner resources and custom projects.

The Performance Review data load includes the following features:

- Performance review data can be loaded for existing standard and off-cycle review tasks.
- The data load can assign users to a performance review task.
- Administrators can load external performance review PDFs.
- The data load can be used to add or update data.
- The data load supports numeric ratings and text ratings.
- The data load supports decimal performance review ratings.

Considerations

- A performance review task must be assigned to at least one user or organizational unit (OU).
- A performance review task must have exactly one review step, and this must be a self-review step. In addition, the self-review step must only contain a single section, and this must be a Sign Off section that is assigned to "Self."
- The rating scale configured for the task should not include custom rounding ranges.
- Tasks in a Queued status cannot be updated.

Implementation

For customers who have not purchased Edge Import, there will be a single marketplace tile called "Edge Import" to allow customers to initiate purchase of the Edge Import product from Edge Marketplace. Once purchased, customers have access to all available loads and feeds in Edge Import, including the new performance review load.

For customers who have already purchased Edge Import, they will have access to all available loads and feeds in Edge Import, including the new performance review load.

A new permission, *Edge Import - Load Review Scores and PDFs*, controls access to this new load type in Edge Import. The template Guide in Edge Import will contain additional information for this new load type.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Edge Import - Load Review Scores and PDFs	Grants access to load performance review scores and PDFs via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, the new *Edge Import - Load Review Scores and PDFs* permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Edge Import - Single Tile in Edge Marketplace for All Loads and Feeds

Edge Import is a product that incurs a flat recurring cost no matter how many Edge Import product solutions a customer uses, but prior to this enhancement, each Edge Import product solution displayed as a separate tile in Edge Marketplace.

With this enhancement, all Edge Import product solutions have been consolidated into a single tile in the Edge Marketplace, which simplifies the Edge Import purchasing and enablement process for administrators. Now, customers can access the single Edge Import tile in the Edge Marketplace to initiate the purchase of all the available loads and feeds at one time.

Customers that have already purchased Edge Import will have access to Edge Import core and learning loads, and they will have access to all available loads and feeds in Edge Import, including Compensation loads (generally available) and Performance Review loads, which are new with the Oct '21 release.

Implementation

This functionality is automatically enabled in the Edge Marketplace for all Edge Import customers. All load types will be visible in the Edge Import user interface (UI), even if the customer does not have all products installed.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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

Employee API v2 Constraints

This enhancement enables customers to begin to constrain Employee API v2 access in the API as it is in the user interface. This enables customers to use Cornerstone's APIs in a more robust way, by enabling third-party integrators who are outside of their organization and should not otherwise have root access to all employee data, to be able to leverage the data they need for their solutions.

Some customers have been unable to utilize Cornerstone's APIs for global rollouts because there was no way to guarantee that employee data (especially EMEA employee data) has not been accessed by any systems outside of the EMEA region. While this has been possible to do from an integrator's side by filtering on the organizational unit (OU), it has not been possible to enforce from a governance perspective, forcing some customers to limit their API rollouts. Support for constraints should allow for tighter controls around employee data when using Employee API v2.

Implementation

The new *Employee API - View - Constrained* permission enforces constraints for read access on the Employee API v2 only. Additional documentation with information on how to enable, and how this permission interacts with the existing permissions is available in the API Explorer upon release of this new API.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Employee API - View - Constrained	Grants ability to use the Employee API v2 to view employee data with constraints. This permission can be constrained by OU and User's OU. The constraints on this permission limit what data is accessible via the Employee API v2. This is an administrator permission. With the February '22 Release, this permission can be constrained by User. This permission is only available when the Employee API v2 is enabled via Edge Marketplace.	Edge

Security Roles

Upon release, the new *Employee API - View - Constrained* permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

Fall 2021 - New Skills Graph Languages

With this enhancement, additional languages are now supported when searching for skills.

The following languages are now available when searching for skills:

- Chinese (Simplified)
- Dutch
- Italian
- Polish
- Swedish
- Russian

Implementation

This functionality is automatically enabled for all organizations.

Improvements to Suggested Skills on Skills Profile

With this release, the following enhancements are now included when suggesting skills on the Skills Profile:

- The Suggested Skills algorithm is updated to return more related skills based on the skills the user has already added.
- The Suggested Skills refresh frequency is increased from once per 24 hours to once per 15 minutes.

How Does this Enhancement Benefit My Organization?

This enhancement optimizes the Skills Profile user experience.

Implementation

This functionality is automatically enabled for all organizations. The Suggest Skills refresh frequency update is available now.

Microsoft Azure Active Directory (AD) One-Click Single Sign-On (SSO) Enhancement

This enhancement streamlines the process of setting up the Microsoft Azure Active Directory One-Click Single Sign-on integration by automating the step in the enablement process to add a new claim. Prior to this enhancement, administrators had to manually map the unique identifiers when adding a new claim between Cornerstone OnDemand and Microsoft Azure. With this enhancement, after a token is generated, administrators can select which identifier to use for adding a new claim.

The following mappings are used of Cornerstone OnDemand unique identifiers to their corresponding identifiers in Microsoft Azure:

- “userid” = “user.employeeid”
- “username” = “user.userprincipalname”
- “email” = “user.mail”

How Does this Enhancement Benefit My Organization?

The process of adding a new claim is automated and attribute mappings are standardized.

Implementation

The Microsoft Azure Active Directory One-Click Single Sign-on integration is available for customers to install in Edge Marketplace. This integration is for Cornerstone customers that use Microsoft Azure AD for their identity and access management service. This enhancement to the integration is available by default with the October ’21 Release.

New Standard Report - Login Report

Customers often need to review who has logged in to their portal. They need to understand which users have logged in to the portal and when. Organizations often need to provide this information to auditors.

Prior to this enhancement, the only way to retrieve this data was by submitting a case to customer support.

With this enhancement, a new Login Report is available in all portals as a standard report so that customers can report on which users have logged in to the portal and when. With this report, it is possible to report on who has logged in during a specific date range, their IP address, and details on how they logged in (e.g., SAML SSO). This report also enables organizations to report on logins that occurred prior to the release of this report.

This report supports 100,000 rows of data.

To access the Login Report, go to **Reports > Standard Reports**. From the System tab, select the **Login Report** link.

Report Details

The following report filters are available:

FILTER NAME	DESCRIPTION
User Criteria	Select a user or a group of users that may be included in the report. This criterion filters the set of users who have logged in to the system and may appear in the report output. You may choose one or more individual users as well as entire organizational units (OUs) or Groups. If permission for this report is constrained, those constraints apply to user criteria selection when running the report.
Date Criteria	Select a date range for the report. The report will return login information for the selected date range. The default value is Last Month. This is a required field.
Login Method	From the drop-down, select a specific login method to only include information for a single login method. If no method is selected, then all methods are included.
User Status	Select this option to include inactive users in the report output.

The following details are included in the report output:

COLUMN NAME	DESCRIPTION
User ID	This displays the ID of the user who logged in to the system.

COLUMN NAME	DESCRIPTION
User Name	This displays the user name of the user who logged in to the system.
User First Name	This displays the first name of the user who logged in to the system.
User Last Name	This displays the last name of the user who logged in to the system.
Division	This displays the division organizational unit of the user who logged in to the system.
Division ID	This displays the division organizational unit ID of the user who logged in to the system.
Cost Center	This displays the cost center organizational unit of the user who logged in to the system.
Cost Center ID	This displays the cost center organizational unit ID of the user who logged in to the system.
Location	This displays the location organizational unit of the user who logged in to the system.
Location ID	This displays the location organizational unit ID of the user who logged in to the system.
Login Date	This displays the date and time at which the user logged in to the system. Date fields are displayed in the time zone of the user running the report.
Impersonate User	This indicates if somebody else logged in as the user. The value in this field displays in the format "PROXY_12345.” In this example, PROXY indicates the ID was accessed using the proxy as user functionality. The number relates to the Global ID of the user who initiated the proxy as user. Global ID is listed in the User Record URL, after TargetUser=.
IP Address	This displays the IP address of the device that the user used to log in to the system (e.g., SSO, Mobile, Desktop Player).
User Login Method	This displays how the user logged in to the system (e.g., SSO, Mobile, Desktop Player).

How Does this Enhancement Benefit My Organization?

This standard report provides insights into which user has logged in and when.

Implementation

This functionality is automatically enabled for all organizations.

This new report is located in the *System* section of Standard reports. Access is controlled by a new *Login Report* permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Login Report	Grants access to the Login Report, which enables organizations to report on which users have logged in to the portal and when. This permission cannot be constrained.	Reports - System

Security Roles

Upon release, the new *Login Report* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

New Standard Report - Proxy as User Report

Customers often need to audit how proxy functionality is being used. They need to understand which users have proxied in, as what user, and when. This information is often requested during formal audits.

Prior to this enhancement, the only way to retrieve this data was by submitting a case to customer support.

With this enhancement, a new Proxy as User Report is available in all portals as a standard report so that customers can report on which users have proxied in, as what user, and when. This report also enables organizations to report on proxy as user events that occurred prior to the release of this report.

This report supports 100,000 rows of data.

To access the Proxy as User Report, go to **Reports > Standard Reports**. From the System tab, select the **Proxy as User Report** link.

Report Details

The following report filters are available:

FILTER NAME	DESCRIPTION
User Criteria	Select a user or a group of users that may be included in the report. This criterion filters the set of users whose account was accessed via proxy login and may appear in the report output. You may choose one or more individual users. If permission for this report is constrained, those constraints apply to user criteria selection when running the report.
Date Criteria	Select a date range for the report. The report will return proxy information for the selected date range. The default value is Last Month. This is a required field.
Action Performed by User ID	Select the user or users who may be included in the report as the user who proxied in as another user. If no users are selected, then all users are included.
User Status	Select this option to include inactive users in the report output.

The following details are included in the report output:

COLUMN NAME	DESCRIPTION
User ID	This displays the ID of the user whose account was accessed via a proxy login.

COLUMN NAME	DESCRIPTION
User Name	This displays the user name of the user whose account was accessed via a proxy login.
User First Name	This displays the first name of the user whose account was accessed via a proxy login.
User Last Name	This displays the last name of the user whose account was accessed via a proxy login.
User Status	This displays the active status of the user whose account was accessed via a proxy login.
Action Performed by User ID	This displays the ID of the user who proxied in as another user.
Action Performed by User Name	This displays the user name of the user who proxied in as another user.
Action Performed by User Full Name	This displays the full name of the user who proxied in as another user.
Action Performed by User Status	This displays the active status of the user who proxied in as another user.
Proxy Start Date and Time	This displays the date and time at which the proxy login began. Date fields are displayed in the time zone of the user running the report.
Proxy End Date and Time	This displays the date and time at which the proxy login ended. Date fields are displayed in the time zone of the user running the report.
Reason for User Emulation	This displays the reason that was provided when the proxy login was initiated.

How Does this Enhancement Benefit My Organization?

This standard report provides insights into which user has proxied in as whom and when. This report eliminates the dependency on work orders to retrieve this data.

Implementation

This functionality is automatically enabled for all organizations.

This new report is located in the *System* section of Standard reports. Access is controlled by a new *Proxy as User Report* permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Proxy as User Report	Grants access to the Proxy as User Report, which enables organizations to report on which users have logged in to the portal and when. This permission cannot be constrained.	Reports - System

Security Roles

Upon release, the new *Proxy as User Report* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

October '21 Language Pack Updates

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

Languages with updates for the October '21 Release include:

- Catalan
- Chinese (Simplified)
- Chinese (Traditional)
- Croatian
- Dutch
- French (France)
- German
- Italian
- Japanese
- Korean
- Lithuanian
- Polish
- Portuguese (Brazil)
- Russian
- Slovak
- Spanish (Spain)
- Swedish
- Turkish
- Ukrainian

Implementation

This functionality is automatically enabled for all organizations.

Online Help Color Refresh

With this enhancement, Cornerstone Online Help is updated with a new color scheme.

This functionality is not available during UAT.

How Does this Enhancement Benefit My Organization?

This functionality enhances the appearance of Online Help.

Considerations

- The content and organization of Online Help are not impacted by this enhancement.
- Any URLs you may have bookmarked or linked to are not impacted by this enhancement.

Implementation

This functionality is automatically enabled for all organizations.

This functionality is not available during UAT.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Help Link - Manager	Provides access to view the User and Manager topics in online help. This is a manager permission.	Core
Help Link - System Administrator	Provides access to view the User, Manager and System Administrator topics in online help. This is an administrator permission.	Core
Help Link - User	Provides access to view the End User topics in online help. This is an end user permission.	Core

Reporting 2.0 - Additional Fields

Additions and updates are made to reporting fields with the October '21 release. See the following topics in Online Help for descriptions of the new fields:

- New Reporting 2.0 Fields in Learning - *See* **Reporting Fields - Learning** on page 229 *for additional information.*
- New Reporting 2.0 Fields in Performance - *See* **Reporting Fields – Observation Checklists** on page 261 *for additional information.*

RTDW Updates to Reporting API, RDW, and Data Exporter

Impacting only customers using Reporting API, Replicated Data Warehouse (RDW), Data Exporter API, 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 will be updated for the October ’21 Release 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.

For customers using Reporting API, Replicated Data Warehouse (RDW), Data Exporter API, or Data Exporter, the changes and deprecated objects will be reflected in Stage as of October 12 and in Production with the release on October 29.

For customers 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 customers six months prior to their deletion.

Data Exporter - Deprecated Objects Scheduled for October '21 Release

This table describes deprecated objects that are still available in the Data Exporter. These objects are scheduled to be removed in the October '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
COMPATIBILITY_curriculum_child_due_date_type_local	curriculum_due_date_type_local_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_feedback_badge_local	feedback_badge_local_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_training_removal_reason_local	training_removal_reason_local_core	Release 21.04.00 (Oct 2021)	Deleted

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
COMPATIBILITY_transcript_delivery_method_local	transcript_origin_type_local_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_user_category_local	user_category_local_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_user_employment_status_local	user_employment_status_local_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_user_leave_reason_local	user_leave_reason_local_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_user_sub_category_local	user_sub_category_local_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_user_termination_reason_local	user_termination_reason_local_core	Release 21.04.00 (Oct 2021)	Deleted
lo_exempt_status_reason_approver_local	training_exemption_reason_local_core	Release 21.04.00 (Oct 2021)	Deleted
lo_exempt_status_reason_local	training_exemption_reason_local_core	Release 21.04.00 (Oct 2021)	Deleted
transcript_action_reason_local	transcript_action_reason_local_core	Release 21.04.00 (Oct 2021)	Deleted
user_ou_status_local	user_ou_status_local_core	Release 21.04.00 (Oct 2021)	Deleted
user_status	user_status_core	Release 21.04.00 (Oct 2021)	Deleted

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
user_status_local	user_status_local_core	Release 21.04.00 (Oct 2021)	Deleted
culture	culture_core	Release 21.04.00 (Oct 2021)	Deleted
language	language_core Note: Use culture_core for culture_name, culture_descr fields in [language].	Release 21.04.00 (Oct 2021)	Deleted
ou_path	ou_hierarchy_core ou_core	Release 21.04.00 (Oct 2021)	Deleted
COMPATIBILITY_training_contact_concat	training_contact_core users_core Note: For COMPATIBILITY_training_contact_concat, one record corresponds to the concatenated list of all contacts (users) to a course. For training_contact_core, one record corresponds to the association of one contact (user) to a course. Use [users_core] to get [user_name_last],[user_name_first, [user_ref] fields for course contact (user).	Release 22.01.00 (Feb 2022)	Marked for deletion
transcript_part_attendance	training_part_attendance_core training_part_core	Release 22.01.00 (Feb 2022)	Marked for deletion
training_curricula	curriculum_structure_core	Release 22.01.00 (Feb 2022)	Marked for deletion
training_relation	training_relationship_core	Release 22.01.00 (Feb 2022)	Marked for deletion

DEPRECATED OBJECT PUBLIC NAME	REPLACEMENT	REMOVAL DATE	ACTION
	(fields: [object_id], [course_relation_type_id], [related_object_id]) Note: Use curriculum_structure_core as replacement for fields in training_relation which are specific for curricula.		
smp_task_review_user_property_audit	No	Release 22.01.00 (Feb 2022)	Marked for deletion
smp_task_review_successor_property_audit	No	Release 22.01.00 (Feb 2022)	Marked for deletion

RTDW - Deprecated Objects Scheduled for July '21 Release

This table describes the deprecated objects that are still available in RTDW. These objects are scheduled to be removed in the July '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
Recruiting	Referrer fields: applicant__referrer_username, applicant__referrer_user_ref, applicant__referrer_name, in report.vw_rpt_applicant_lite	Fields from report.vw_rpt_user: user_login, user_ref, user_name_last, user_name_first To get Referrer fields: 1. Join report.vw_rpt_applicant_lite with report.vw_rpt_user on applicant_referred_by(report.vw_rpt_applicant) = user_id (report.vw_rpt_user). 2. Use [user_login], [user_ref], [user_name_last],	Release 22.01.00 (Feb 2022)	Marked for deletion

CATEGORY	DEPRECATED OBJECT	REPLACEMENT	REMOVAL DATE	ACTION
		[user_name_first] 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		
Job Pool, Succession	report.vw_rpt_smp_task _review_user_property_audit	No	Release 22.01.00 (Feb 2022)	Marked for deletion
Job Pool	report.vw_rpt_smp_task _review_successor_property_audit	No	Release 22.01.00 (Feb 2022)	Marked for deletion

Search the Skills Graph

Search the Skills Graph

With this enhancement, administrators can now search for any skill and import it into their organization's Capabilities Library. When creating a skill, an auto-complete drop-down suggests skills from the Skills Graph and helps identify any duplicates that are already in the portal's library. Once a skill is imported, the description is displayed as a preview and can be modified at any time for clarity or to align with an organization's communication style. Administrators are free to ignore suggestions and can create custom skills.

Also new with this release, administrators can choose to allow users to search the entire Skills Graph or limit their search to skills in their portal's Capabilities Library. When the new preference to allow users to search the Skills Graph is enabled, users can search and add any skill from the Skills Graph to their Skills Profile. Skills that are added to a user's Skills Profile from the Skills Graph are automatically imported into a portal's Capabilities Library in a published/active status.

How Does this Enhancement Benefit My Organization?

This enhancement enables administrators and employees to search and add any skill from the Skills Graph into their library.

Implementation

This functionality is automatically enabled for all organizations.

The ability for employees to search the Skills Graph is disabled by default and can be enabled using the new "Search the Skills Graph" toggle located in the Skills Profile tab of the Capabilities Preferences page.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants ability to create, edit, and copy 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 create, edit, copy, delete, import, and approve 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 expertise levels and rating scales for capabilities via Capabilities Preferences. This permission cannot be constrained. This is an administrator permission.	Core Administration

Capabilities Library - Search the Skills Graph

With this enhancement, administrators can search for skills within the Skills Graph when creating a skill and import it into the organization's Capabilities Library. When creating a skill, an auto-complete drop-down suggests skills from the Skills Graph and helps identify any duplicates that are already in the portal's library. Once a skill is imported, the description is displayed as a preview and can be modified at any time for clarity or to align with an organization’s communication style. Administrators are free to ignore suggestions and can create custom skills as needed.

A skill added from the Skills Graph should have the source set as "Cornerstone Skills Graph" once it is created.

Upon search, if the administrator selects a skill that is already imported in their library, a warning is displayed to indicate that the skill already exists in the portal's library.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants ability to create, edit, and copy 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 create, edit, copy, delete, import, and approve capabilities via the Capability Library. This permission cannot be constrained. This is an administrator permission.	Core Administration

Capabilities Preferences - Search the Skills Graph

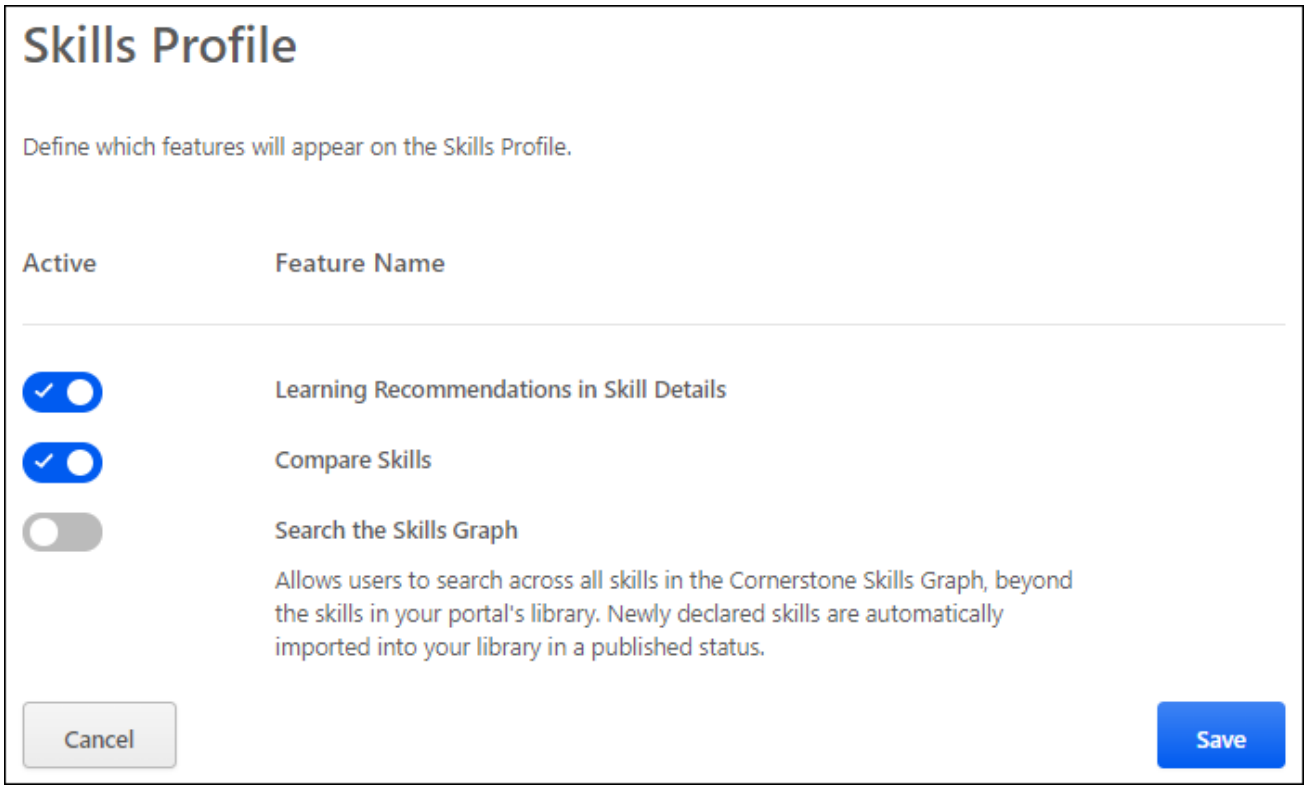
With this enhancement, the following preference is now available in Capabilities Preferences:

- **Search the Skills Graph** - When this toggle is disabled, users can only search for skills within the portal's Capabilities Library. When this toggle is enabled, users can search for and add any skill from the Skills Graph to their Skills Profile. Skills that are added to a user's Skills Profile from the Skills Graph are automatically imported into the portal's Capabilities Library in a published/active status.

To access Skills Profile Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PREFERENCES. Then, select the Skills Profile tab.

Permissions

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



Skill Feedback - Request Others to Rate Themselves + Other Enhancements

Skill Feedback - Request Others to Rate Themselves + Other Enhancements

With this enhancement, the skills feedback experience is enhanced with new templates and updates to the feedback template administrator experience.

The following enhancements are included:

- New Template - Request Someone to Rate Themself: Administrators, managers, or other leadership roles can ask others to rate themselves from a list of skills that they have chosen. *See* **Feedback Template - Request Someone to Rate Themself** on page 109 *for additional information.*
- New Template - Request Private Feedback: Employees can request others to provide private feedback. *See* **Feedback Template - Request Private Feedback** on page 112 *for additional information.*
- Feedback Template Enhancements - Administrator Experience - *See* **Feedback Template Enhancements - Administrator Experience** on page 105 *for additional information.*
  - General Settings - New “How is feedback initiated?” radio button. Choose “Request” or “Unsolicited”.
  - General Settings - Fields renamed for clarity and new fields added to support “Request” vs “Unsolicited” feedback.
  - General Settings - New “Request Target User Type” radio button. Choose if feedback is for requestor or someone else.
  - New Feature Connector - Request Builder: Makes the feedback template accessible from the request builder in My Feedback Requests.

How Does this Enhancement Benefit My Organization?

Customer-driven enhancements to feedback templates improve skill feedback versatility by increasing the ways in which feedback can be requested.

Implementation

This functionality is automatically enabled for all organizations. Administrators can manage the new templates using the Feedback Templates functionality in Core Functions.

New templates can be accessed for use from the request builder on the My Feedback Requests page. Access to the "Request Someone to Rate Themself" template is controlled by the new permission, *User Ratings - Request others to provide feedback on themselves*. Anyone with this permission can use the request builder in My Feedback Requests to request users to rate themselves.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

User Ratings - Request Others to Provide Feedback on Themselves	Grants ability to request that someone rate themself. This permission is intended for administrators, managers, or other leadership roles. This permission cannot be constrained.	Core Administration

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage feedback 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. For Cornerstone Xplor, grants the ability to view, give, and receive skill feedback and ratings.	Core Administration

Security Roles

Upon release, the new *User Ratings - Request Others to Provide Feedback on Themselves* permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary.

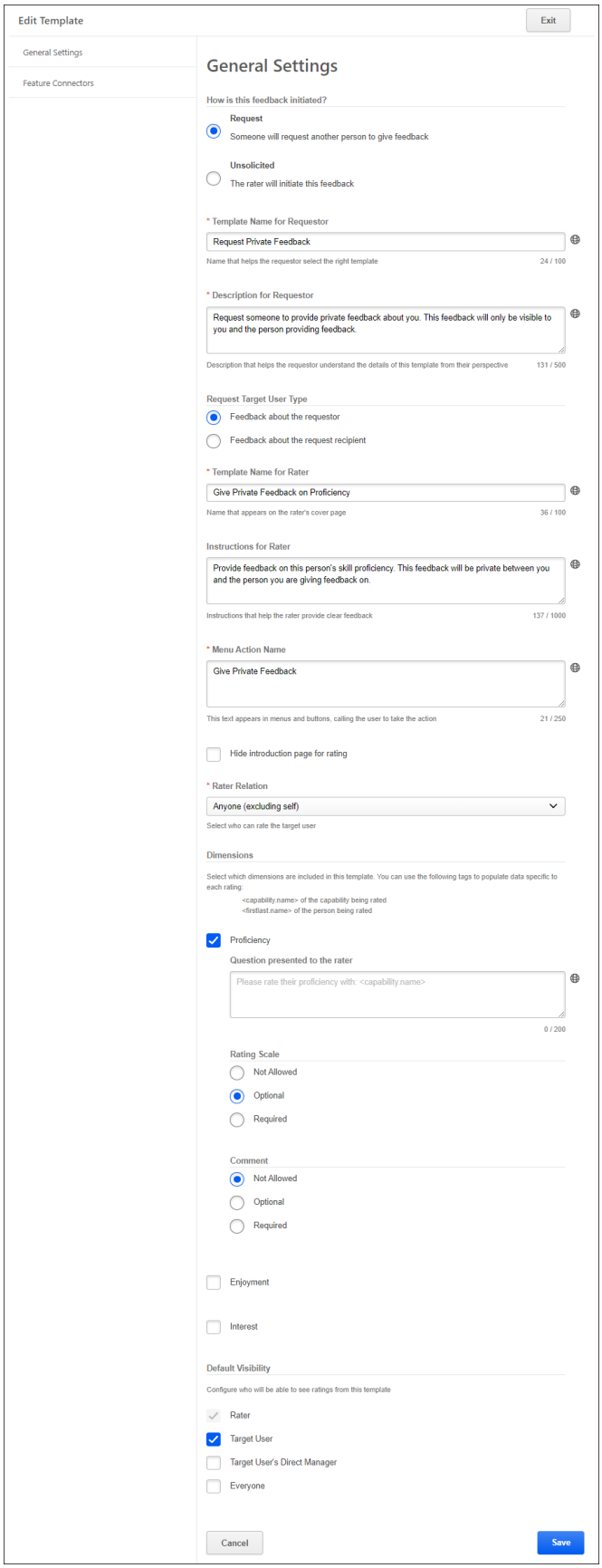
Feedback Template Enhancements - Administrator Experience

When editing a feedback template, some fields have been renamed and additional fields have been added to better support the feedback functionality.

To manage capabilities feedback templates, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > FEEDBACK TEMPLATES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage feedback 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. For Cornerstone Xplor, grants the ability to view, give, and receive skill feedback and ratings.	Core Administration


Edit Template
Exit
General Settings
Feature Connectors
General Settings
How is this feedback initiated?
Request
Someone will request another person to give feedback
Unsolicited
The rater will initiate this feedback
* Template Name for Requestor
Request Private Feedback
Name that helps the requestor select the right template
24 / 100
* Description for Requestor
Request someone to provide private feedback about you. This feedback will only be visible to you and the person providing feedback.
Description that helps the requestor understand the details of this template from their perspective
131 / 500
Request Target User Type
Feedback about the requestor
Feedback about the request recipient
* Template Name for Rater
Give Private Feedback on Proficiency
Name that appears on the rater's cover page
36 / 100
Instructions for Rater
Provide feedback on this person's skill proficiency. This feedback will be private between you and the person you are giving feedback on.
Instructions that help the rater provide clear feedback
137 / 1000
* Menu Action Name
Give Private Feedback
This text appears in menus and buttons, calling the user to take the action
21 / 250
Hide introduction page for rating
* Rater Relation
Anyone (excluding 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 their proficiency with: <capability.name>
0 / 200
Rating Scale
Not Allowed
Optional
Required
Comment
Not Allowed
Optional
Required
Enjoyment
Interest
Default Visibility
Configure who will be able to see ratings from this template
Rater
Target User
Target User's Direct Manager
Everyone
Cancel
Save

New Field: How is feedback initiated?

A new **How is feedback initiated?** radio button field is now available on the General Settings page. This field enables administrators to specify whether the corresponding feedback template is used to request feedback from another person or if it is used by users to initiate and provide unsolicited feedback. Depending on which option is selected, additional configurations may be available for the template. The following options are available:

- Request - Select this option if the feedback template allows users to request feedback from another user. When this option is selected, additional settings are available to allow the administrator to provide a name and instructions that are specific for the user requesting the feedback.
- Unsolicited - Select this option if the feedback template allows users to initiate and provide unsolicited feedback for another user.

Existing templates will retain their settings, and a Request or Unsolicited setting will be selected based on the other template settings. If a template was previously used for Request and Unsolicited feedback, there are now two separate templates in its place, one for Request and one for Unsolicited feedback. This enables administrators to tailor the template instructions for each type of feedback.

Any existing request links are not impacted by this change.

New Fields for Request Feedback Templates

When Request is selected in the **How is feedback initiated?** field, the following additional fields are now available:

- **Template Name for Requestor** - In this field, specify the title text that will appear when users are choosing a template to request feedback. This title should help the requester select the appropriate template.
- **Description for Requestor** - In this field, provide a description of the template that will appear when users are choosing a template to request feedback. The description should help the requester select the appropriate template.
- **Request Target User Type** - In this field, select whether the feedback template is used to request feedback about the requester or about the request recipient. The following options are available:
  - Feedback about the requester - Select this option if the template is used to request feedback about the user who is requesting the feedback. When this option is selected, the **Rater Relation** drop-down is set to Anyone (excluding self).
  - Feedback about the request recipient - Select this option if the template is used to request feedback about the request recipient. When this option is selected, the **Rater Relation** drop-down is set to Self.

Note: *These fields are not available for Unsolicited feedback templates because there is no requester for this feedback interaction.*

Renamed Fields on General Settings

The following fields have been renamed to support different templates and descriptions for the requester and the rater of feedback:

- **Display Name** is renamed to **Template Name for Rater**. This change is to more clearly indicate that this field is what the rater will see on the introduction page before providing feedback.
- **Instructions** is renamed to **Instructions for Rater**. This change is to more clearly indicate that this field is the instructions that the rater will see on the introduction page before providing feedback.

New Feature Connector: Request Builder

A new **Request Builder** feature connector is now available on the Feature Connectors page. This feature connector enables users to initiate a feedback request using the corresponding template via the request builder in My Feedback Requests. The request target user type for the template is set in the General Settings. When initiating a feedback request, the requester can select which users are included in their request and which skills are being evaluated in the request.

Feedback Template - Request Someone to Rate Themself

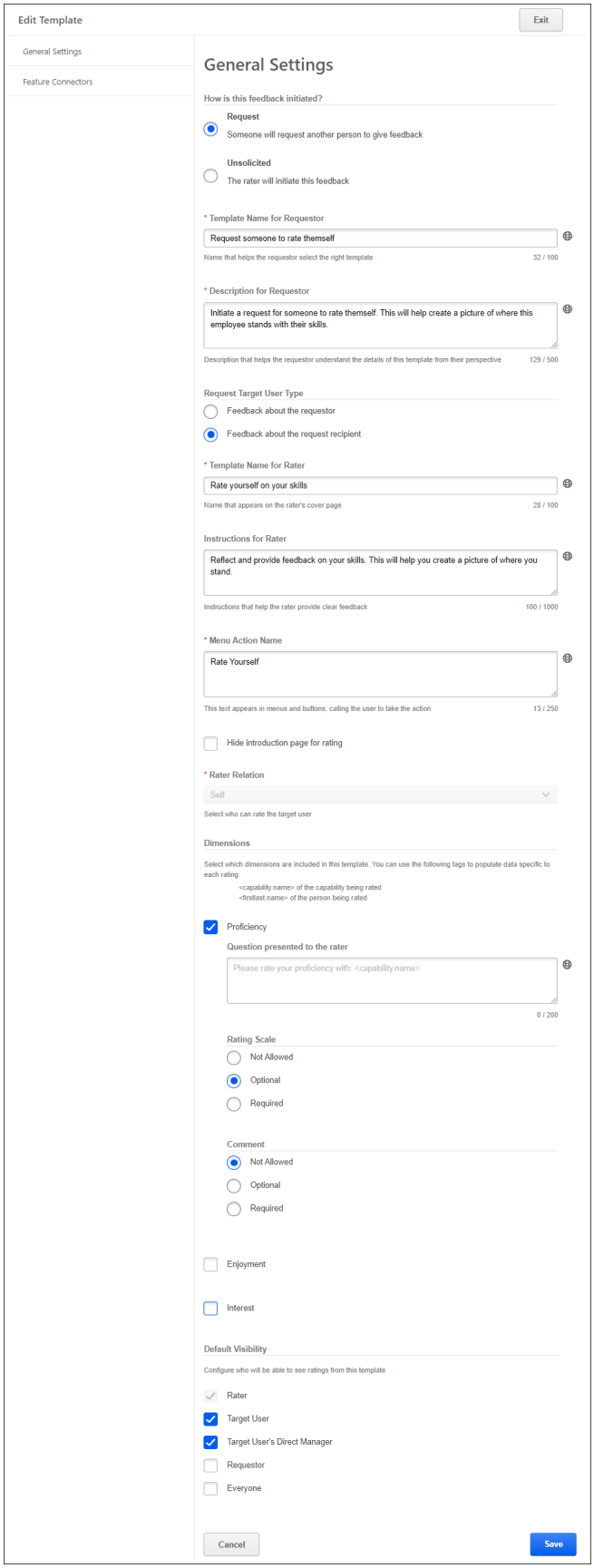
The "Request Someone to Rate Themself" template enables administrators, managers, or other leadership roles to ask others to rate themselves from a list of skills that they have chosen. The person who creates the request is able to select which skill are included in the request.

Users who have permission to request others to provide feedback on themselves will have access to this template when requesting feedback in My Feedback Requests. *See Skills Profile - My Feedback Requests.*

To manage capabilities feedback templates, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > FEEDBACK TEMPLATES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage feedback 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 - Request Others to Provide Feedback on Themselves	Grants ability to request that someone rate themself. This permission is intended for administrators, managers, or other leadership roles. This permission cannot be constrained.	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. For Cornerstone Xplor, grants the ability to view, give, and receive skill feedback and ratings.	Core Administration


Edit Template
Exit
General Settings
Feature Connectors
General Settings
How is this feedback initiated?
Request
Someone will request another person to give feedback
Unsolicited
The rater will initiate this feedback
* Template Name for Requestor
Request someone to rate themself
Name that helps the requestor select the right template
32 / 100
* Description for Requestor
Initiate a request for someone to rate themself. This will help create a picture of where this employee stands with their skills.
Description that helps the requestor understand the details of this template from their perspective
129 / 500
Request Target User Type
Feedback about the requestor
Feedback about the request recipient
* Template Name for Rater
Rate yourself on your skills
Name that appears on the rater's cover page
28 / 100
Instructions for Rater
Reflect and provide feedback on your skills. This will help you create a picture of where you stand.
Instructions that help the rater provide clear feedback
100 / 1000
* Menu Action Name
Rate Yourself
This text appears in menus and buttons, calling the user to take the action
13 / 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
Rating Scale
Not Allowed
Optional
Required
Comment
Not Allowed
Optional
Required
Enjoyment
Interest
Default Visibility
Configure who will be able to see ratings from this template
Rater
Target User
Target User's Direct Manager
Requestor
Everyone
Cancel
Save

General Settings

The following default values are set for this template on the *General Settings* page:

- Template Name for Requestor - Request someone to rate themself
- Description for Requestor - Initiate a request for someone to rate themself. This will help create a picture of where this employee stands with their skills.
- Template Name for Rater - Rate yourself on your skills
- Instructions for Rater - Reflect and provide feedback on your skills. This will help you create a picture of where you stand.
- Rater Relation - Self
- Dimensions - Proficiency, Interest
- Default Visibility - Rater, Target User, Target User's Direct Manager

Feature Connectors

On the *Feature Connectors* page, the Request Builder feature connector is available for the Request Someone to Rate Themself template.

Feedback Template - Request Private Feedback

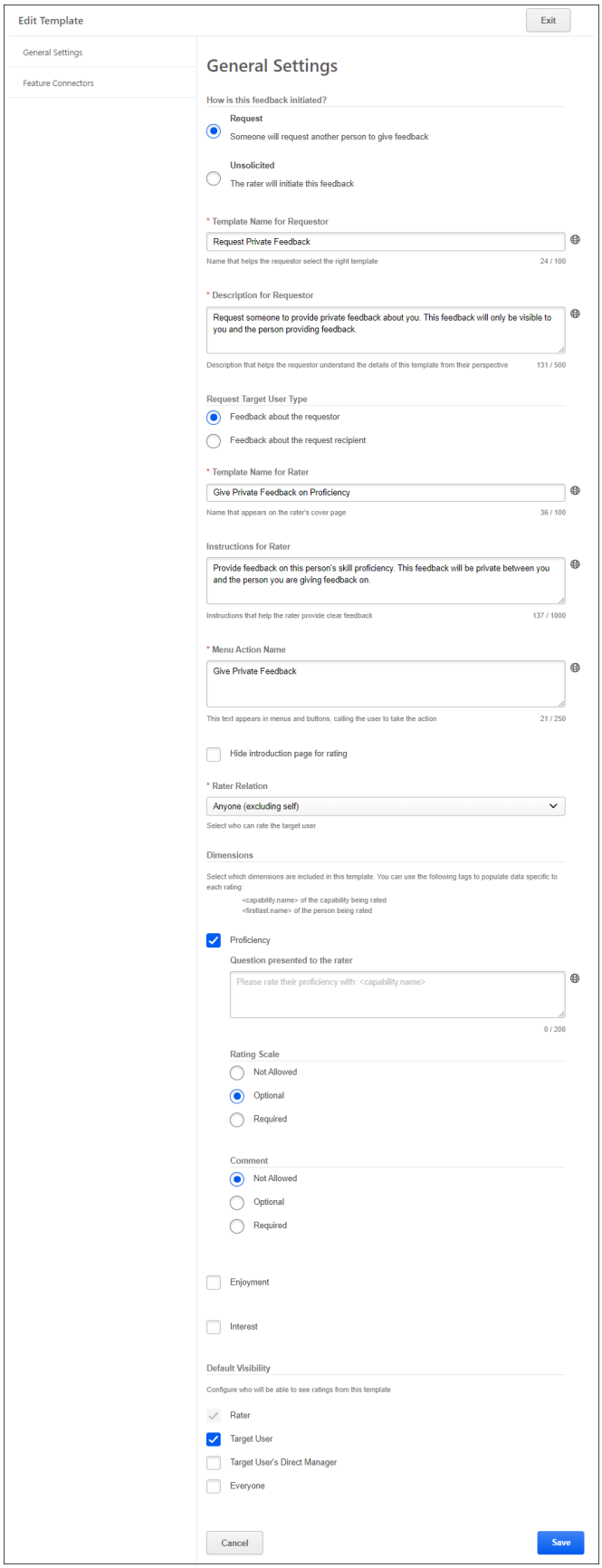
The "Request Private Feedback" template enables employees to request others to provide private feedback. The person who creates the request is able to select which skill are included in the request.

Users will have access to this template when requesting feedback in My Feedback Requests. *See Skills Profile - My Feedback Requests.*

To manage capabilities feedback templates, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > FEEDBACK TEMPLATES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Rating Templates - Manage	Grants ability to manage feedback 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. For Cornerstone Xplor, grants the ability to view, give, and receive skill feedback and ratings.	Core Administration


Edit Template
Exit
General Settings
Feature Connectors
General Settings
How is this feedback initiated?
Request
Someone will request another person to give feedback
Unsolicited
The rater will initiate this feedback
* Template Name for Requestor
Request Private Feedback
Name that helps the requestor select the right template
24 / 100
* Description for Requestor
Request someone to provide private feedback about you. This feedback will only be visible to you and the person providing feedback.
Description that helps the requestor understand the details of this template from their perspective
131 / 500
Request Target User Type
Feedback about the requestor
Feedback about the request recipient
* Template Name for Rater
Give Private Feedback on Proficiency
Name that appears on the rater's cover page
36 / 100
Instructions for Rater
Provide feedback on this person's skill proficiency. This feedback will be private between you and the person you are giving feedback on.
Instructions that help the rater provide clear feedback
137 / 1000
* Menu Action Name
Give Private Feedback
This text appears in menus and buttons, calling the user to take the action
21 / 250
Hide introduction page for rating
* Rater Relation
Anyone (excluding 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 their proficiency with: <capability.name>
0 / 200
Rating Scale
Not Allowed
Optional
Required
Comment
Not Allowed
Optional
Required
Enjoyment
Interest
Default Visibility
Configure who will be able to see ratings from this template
Rater
Target User
Target User's Direct Manager
Everyone
Cancel
Save

General Settings

The following default values are set for this template on the *General Settings* page:

- Requestor Title - Request Private Feedback
- Requestor Instructions - Request someone to provide private feedback about you. This feedback will only be visible to you and the person providing feedback.
- Request Target User - Requestor
- Rater Title - Give Private Feedback on Proficiency
- Rater Instructions - Provide feedback on this person's skill proficiency. This feedback will be private between you and the person you are giving feedback on.
- Dimensions - Proficiency
- Visibility - Target User, Rater
- Rater Relation - Anyone (but self)

Feature Connectors

On the *Feature Connectors* page, the Request Builder feature connector is available for the Request Private Feedback template.

Request Feedback

When requesting feedback, users who have permission to request others to provide feedback on themselves now have the following option:

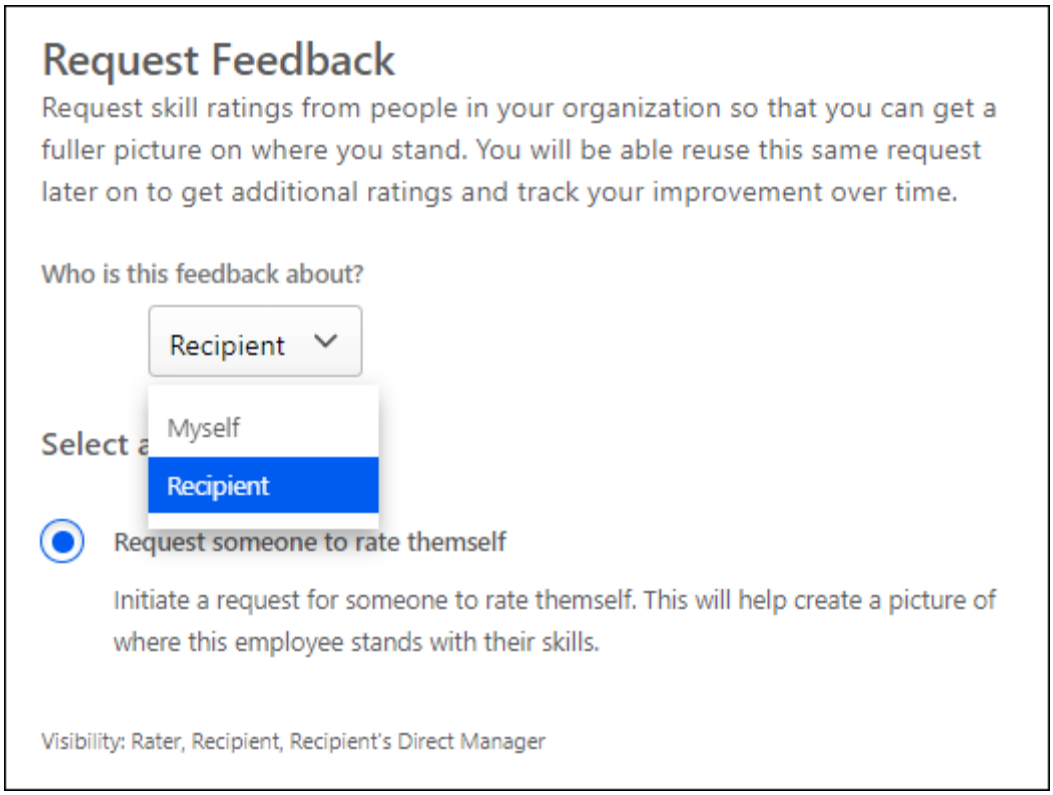
- **Who is this feedback about?** - This option allows the requester to select whether they are requesting feedback about the requester or requesting others to provide feedback about themselves. Depending on which option is selected, the requester can select one of the corresponding feedback templates for their request. This option is only available for users who have permission to request others to provide feedback on themselves. If the requester does not have this permission, then users can only select self feedback.

The **Select a format** option only displays feedback templates that correspond with the selection in the **Who is this feedback about?** drop-down. In addition, this section only displays feedback templates that are configured for requesting feedback, not unsolicited feedback.

To view the My Feedback Requests page, go to HOME > UNIVERSAL PROFILE. Then, from the Skills menu, select **My Feedback Requests**.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
User Ratings - Request Others to Provide Feedback on Themselves	Grants ability to request that someone rate themself. This permission is intended for administrators, managers, or other leadership roles. This permission cannot be constrained.	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. For Cornerstone Xplor, grants the ability to view, give, and receive skill feedback and ratings.	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.
Who is this feedback about?
Recipient
Myself
Recipient
Select a
Request someone to rate themself
Initiate a request for someone to rate themself. This will help create a picture of where this employee stands with their skills.
Visibility: Rater, Recipient, Recipient's Direct Manager

Transcript and Task API Constraints

Prior to this enhancement, some customers have been unable to utilize Cornerstone's APIs for global rollouts because there was no way to guarantee that employee data (especially EMEA employee data) has not been accessed by any systems outside of the EMEA region. While this has been possible to do from an integrator's side by filtering on the organizational unit (OU), it has not been possible to enforce from a governance perspective, forcing some customers to limit their API rollouts.

This enhancement enables customers to constrain Transcript and Task API access in the API as it is in the system. This enables customers to use Cornerstone's APIs in a more robust way, by enabling third-party integrators who are outside of their organization and should not otherwise have root access to all employee data, to be able to leverage the data they need for their solutions. Support for constraints should allow for tighter controls around employee data when using Transcript and Task API.

Implementation

Organizations must submit a case to Global Customer Support to enable this functionality. Additional documentation will be available in the API Explorer upon release of this new API.

"User Skill" Fields in Data Exporter and Data Explorer API

With this enhancement, User Skill reporting fields made available in Reporting 2.0 are now available to use in the Data Exporter and Data Exporter API.

See Reporting 2.0 Overview.

How Does this Enhancement Benefit My Organization?

Customers want to include their User Skills information in the Reporting API.

Implementation

This functionality is automatically enabled for organizations that use the Data Exporter or Data Exporter API.

Cornerstone HR

Workflow Engine (Early Adopter)

Workflow Engine is a new process orchestration platform that is the foundation for process management across all Cornerstone talent suites and external integrations. It is built using Amazon Web Services and is highly extensible and scalable.

Workflow Engine is flowchart-based and used to configure and edit workflows.

For early adopters, Cornerstone is combining the power of Workflow Engine with the Cornerstone HR Forms feature to support complex data management workflows, focusing on focus on Employee Self-Service, Manager Proxy, and Admin Proxy forms use cases. This is a significant expansion in the process capabilities over the current forms approval workflow.

The following features are included with Workflow Engine:

- Multiple Employee Data Management Forms – No limit on the number of forms that can be used in a single workflow.
- More Than 5 Approvals (Unlimited Approvals) – No limit on the number of approvals.
- Parallel Completion of Forms – Multiple users can update employee data, for example Management, HR, and Payroll can update employee data asynchronously.
- Conditional Based Branching – Provides unique execution paths based on user information.
- Dynamic Assignment – Logical reduction of assignees based upon user organizational unit (OU).
- Automatic re-assignment - Ensures workflows do not fail service-level agreement (SLA).
- Manage workflows - Manually re-assign or terminate workflows.
- Workflow library - Contains all workflows created within a portal, which users can activate, inactivate and archive.

Considerations for Early Adopters

- Workflow Engine can be used for “Employee” target users, but not for onboarding or applicant use cases.
- Self-service and proxy use cases are supported, but future dated scheduling is not supported.
- Deny and Return outcome of Approval Activity always returns the workflow to the first form in a Form Approval sequence.
- Localization is not available for Workflow Name, Workflow Description, Activity Title, and Activity Description fields.

Implementation for Early Adopters

- Cornerstone HR customers interested in becoming Workflow Engine Early Adopters can submit a case to customer support for enablement.
- Once enabled, customers see a new “Initiate Workflows” option added to Universal Profile Options menu. Workflows use forms in the existing Forms Management forms library.

- Existing Forms reporting is supported.
- Existing email notifications for forms and approvals are reused for Workflow Engine.

Workflow Engine - Workflow Process Overview

Workflow Engine is a process orchestration platform that is the foundation for process management across all Cornerstone talent suites and external integrations. It is built using Amazon Web Services and is highly extensible and scalable.

Workflow Engine is flowchart-based and used to configure and edit workflows.

Use the following process to manage workflows:

1. **Enter/edit the workflow name and description.**
2. **Create or edit workflow branching logic to assign activities when criteria is met**.
3. **View or edit user or system workflow activities**.
4. **Set Triggers to enroll or edit employees in a workflow.**
5. **Publish workflows**.
6. **Assign Workflows**.
7. **Execute Workflows**.

- To create a new workflow, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY. Then select the **CREATE WORKFLOW** button.
- To edit a workflow, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY and select the workflow you want to edit. ***Note****: You can only edit workflows in* **Saved as Draft** *status.*

Workflow Engine - Manage Navigation Tabs and Links

The Navigational Tabs & Links page enables administrators to customize which tabs and links are available to users in the system by Division. Administrators can rename or change the order of tabs and links.

To manage Navigation Tabs and Links preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CORE PREFERENCES > NAVIGATION TABS AND LINKS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Navigation Tabs and Links - Manage	Grants ability to manage Navigation Tabs and Links for the portal. This permission can be constrained by OU, User's OU, and User's Corporation. This is an administrator permission.	Core Administration

The following links are available to add to Workflow Engine navigation:

- Workflow Library
- Workflow Executions
- Global Workflow Settings

See Navigational Tabs and Links.

Workflow Engine- Email Administration

Existing email notifications for forms and approvals will be used for Workflow Engine to notify users of actions and assignments.

To create an email digest, go ADMIN > TOOLS > CORE FUNCTIONS > EMAIL DIGEST MANAGEMENT.

Creating an email digest is the same across all areas. *See Email Digest - Create/Edit.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Email Digest Administration - Manage	Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission.	Performance - Administration

The following emails are available for Form Management:

- Form Assigned
- Form Completed
- Form Approval Required
- Form Approval Completed
- Self-Service Form Submitted

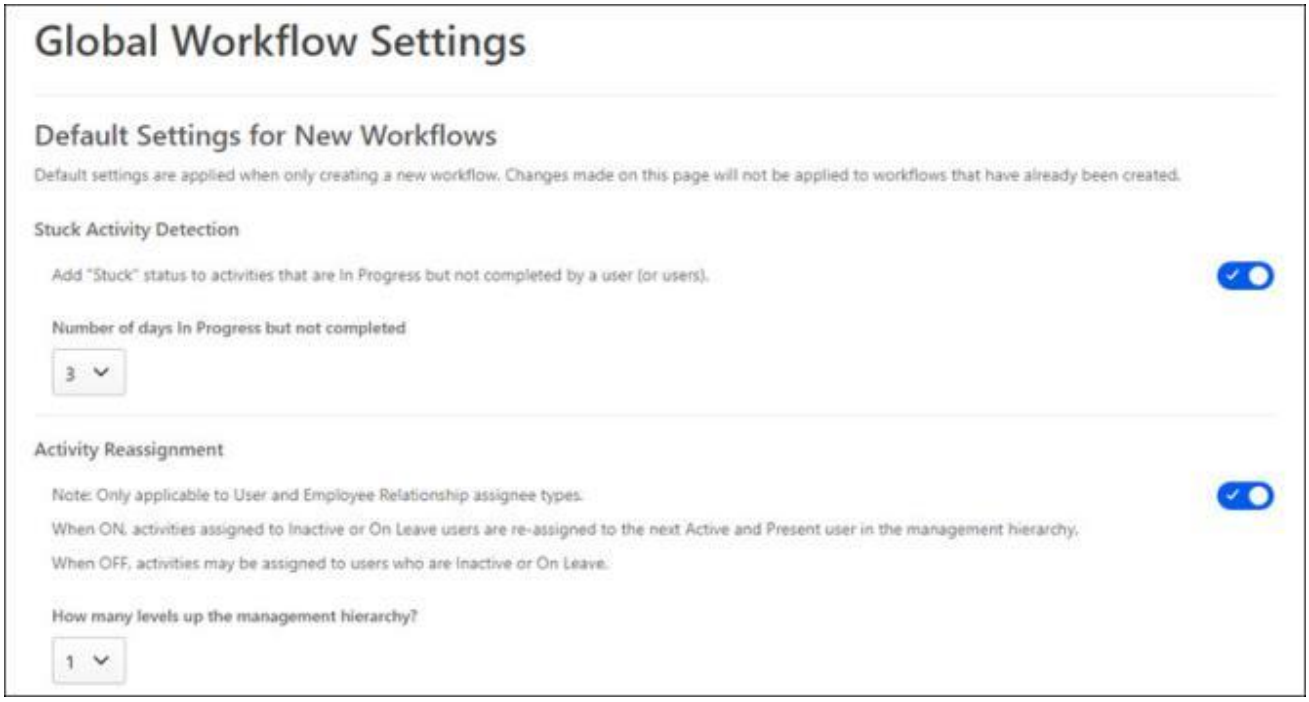
Workflow Engine - Manage Global Workflow Settings

Use the Global Workflow Settings page to configure settings for newly created workflows. The settings on this page do not apply to workflows created previously.

To access the Global Workflow Settings page, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > GLOBAL WORKFLOW SETTINGS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflows - Global Settings	Grants access to manage Global Workflow Settings.	Workflow Engine



Default Settings for New Workflows

You can configure the following settings:

- **Stuck Activity Detection** - Enable this option to add Stuck status to In Progress activities that are not completed after a specific number of days. Select the number of days in the **Number of days in Progress but not completed** drop-down. The Stuck status appears on the Workflow Execution pages. *See* **Workflow Engine - Manage Workflow Execution** on page 139 *for additional information.*
- **Activity Reassignment** - Enable this option to automatically reassign workflow activities to the user's manager or higher if the assignee is Inactive or On Leave at the time of the assignment. This assignment only applies if the activity is assigned to an

Employee Relationship or User. ***Note****: If this option is not enabled, activities can be assigned to users who are inactive or on leave.*

Workflow Engine - Manage Workflow Library

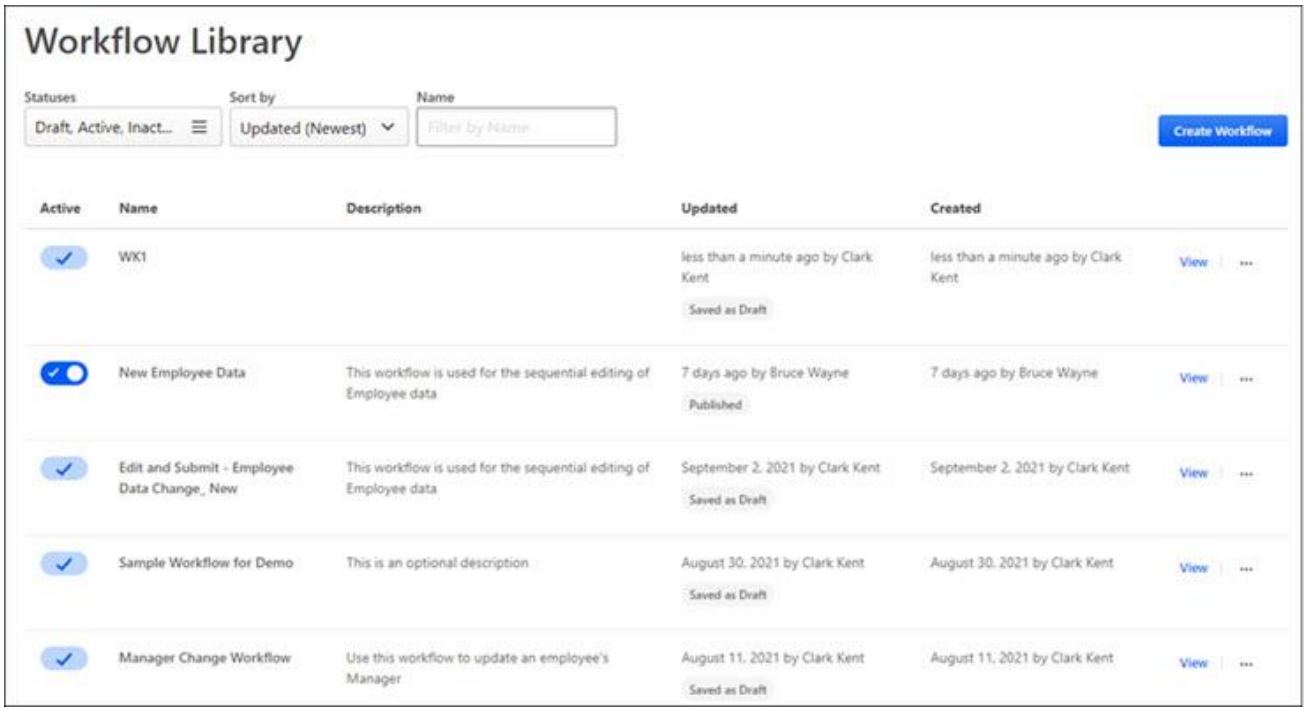
Use the Workflow Library page to search, view, create, activate/inactivate, edit, copy, and archive workflows.

***Note**: Workflows are the processes used to deliver forms. Forms are created in Form Management*. *See Manage Forms.*

To access the Workflow Library, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Engine - Workflow Library - Manage	Grants access to view, edit, and publish workflows in the Workflow Library. This is an administrator permission.	Workflow Engine



Search for Workflows

Use the following fields to search for specific workflows:

- **Statuses** - Filter workflows by Draft, Active, Inactive, or Archived.
- **Sort by** - Sort workflows by Updated (Newest), Updated (Oldest), Created (Newest), Created (Oldest)
- **Name** - Search for workflows by name.

Create Workflow

Click the **CREATE WORKFLOW** button to create new workflows. *See* **Workflow Engine - Workflow Process Overview** on page 122 *for additional information.*

Workflow Library Table

The Workflow Library table contains the following information:

- **Active** - Activate or inactivate published workflows. This option does not apply to workflows in Saved as Draft status.
- **Name** - Name of the workflow.
- **Description** - Description of the workflow.
- **Updated** - The date and user who updated this workflow. Also includes the current status of the workflow. Workflow status options are Saved as Draft, Published, or Stuck.
- Created - When the user created this workflow.

View

Select **View** to open a read-only version of the workflow details, including the Flowchart, Table view, Settings, Activities, and Triggers for the selected workflow.

Workflow Options

The following options appear on the Workflow Library page for each workflow:

- Edit - Change **Saved as Draft** workflows.
- Copy - Copy an existing workflow.
- Archive - Archive a workflow. Applies to **Saved as Draft** workflow or **Published** workflow in inactive status.0

Note*: If you leave a workflow before it is published, it is automatically saved as draft to the Workflow Library.*

Manage Workflows

Workflow Engine - Enter/Edit Workflow Name and Description

Enter a name and description for your workflow.

- To manage the name and description for your workflow go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Engine - Workflow Library - Manage	Grants access to view, edit, and publish workflows in the Workflow Library. This is an administrator permission.	Workflow Engine

Create a New Workflow Name and Description

Click the **CREATE WORKFLOW** button and enter a name and description. Select the **CREATE** button to open the Flowchart page.

Edit a Workflow Name and Description

Select the ellipsis for a workflow and select **Edit**. Select **Name and Description**, and then select **SAVE**. You can edit the name and description for **Saved as Draft** workflows only.

Workflow Engine - Manage Flowchart Activities

Use the Table page to manage Flowchart activities. You can view activities, add, edit, and delete activities.

- If you are creating a new workflow, this page opens once you click **CREATE** on the Create a Workflow page. *See* **Workflow Engine - Enter/Edit Workflow Name and Description** on page 129 *for additional information.*
- To edit a Flowchart Activity, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY, select the ellipses for the workflow flowchart you want to edit, and click Edit. Select the Table tab. ***Note**: You can only edit workflows in* **Saved as Draft** *status.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Engine - Workflow Library - Manage	Grants access to view, edit, and publish workflows in the Workflow Library. This is an administrator permission.	Workflow Engine

Add an Activity to the Flowchart

When creating a Form you can add activities that perform actions related to your Workflow. There are two general activity categories:

- User Activities - Form Completion and Approval. These activities are assigned to (and completed by) a user.
- System Activities - If/Then, Split, Merge, Save Data, and End Workflow. The user is not required to take any action to complete these activities. are System Activities.

To add an activity:

1. Select the plus sign. The New Activity panel opens.
2. Select an activity and complete the fields:
   - **Approval** - This activity is used to Approve, Deny, or Deny and Return the Form Completion activity in a workflow. This activity can be assigned to User, Employee Relation, or Organizational Unit. When added to a workflow the Approval activity allows you to create follow-up activities if approval is Approved or Denied. Complete the following:
     a. (optional) Enter a Title and Description.
     b. Review the forms being approved.
     c. Select the Assignee.
   - **If/Then** - This activity allows you to choose an Organization Unit where you want to route further workflow activities. If a user meets the criteria, they move forward down a specific branch. When added to a workflow the Approval activity allows you

to create follow-up activities if users meet the specified criteria. Complete the following:
   a. (optional) Add a Title and Description.
   b. Select OUs that determine the activity criteria.
- **Form Completion** - This activity uses forms from your existing Manage Forms to manage employee data. Assign this activity to User, Employee Relation, or OU. Complete the following:
   a. Enter a Title. You can enter up to 100 characters.
   b. (optional) Enter a Description. You can enter up to 500 characters.
   c. Select the Form to complete.
   d. Select the Assignee.
- **Split Activity**/**Merge Activity**- This activity splits the execution of a workflow into multiple parallel branches containing independent activities. After the Split activity is added to a workflow, and a Form Complete activity added to each branch, use the Merge Activity to join the parallel branches into a single execution path.
- **Save Data** /**End Workflow** - The Save activity is used to save employee data changes in a workflow execution. The End activity is used to identify the end of workflow or workflow branch. This activity signals to the system that a workflow is done.

3. (optional) Click the **Detailed View** toggle to view the related form and assignees.
4. Select the **SAVE** button for each activity you create.

Edit Flowchart Activities

Use the Activity table to view, add, edit, and delete activities.

Activity Table

The Activity table displays the following information:

- Activity# - The system-generated activity number.
- Title - The name of the activity.
- Activity Type - The type of activity.
- Outcome - The outcome of the selected activity.
- Next Activity - The number of the activity that follows the selected activity.

Options

The following options appear for each activity:

- Add Activity - Add an activity to the Flowchart. This option is only visible for workflows with no activities.
- Manage - View or edit the selected activity.
- Delete - Delete the selected activity.

Workflow Engine - Manage Workflow Settings

Use the Workflow Setting page to change the name and description of your workflow, set the individual Activity Reassignment, and turn-on stuck activity detection.

- If you are creating a new workflow, this page is accessible once you click **CREATE** on the Create a Workflow page. *See* **Workflow Engine - Enter/Edit Workflow Name and Description** on page 129 *for additional information.*
- To manage Workflow Settings, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY, select the ellipses for the workflow flowchart you want to edit, and click Edit. Select the Settings tab. ***Note****: You can only edit workflows in* **Saved as Draft** *status.*

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Engine - Workflow Library - Manage	Grants access to view, edit, and publish workflows in the Workflow Library. This is an administrator permission.	Workflow Engine

Name and Description

Select this page to edit the name and description of the selected workflow.

Activity Reassignment

Select this page to enable or disable activity reassignment:

- Enable the toggle to reassign Inactive or On Leave users to the next Active and Present user in the management hierarchy.
- Disable the toggle to turn off activity reassignment. If disabled, activities may be assigned to users who are Inactive or On Leave status.
- How many levels up the management hierarchy - Select up to 5 levels.

Stuck Activity Detection

Enable this option to add Stuck status to In Progress activities that are not completed after a specific number of days. Select the number of days in the **Number of days in Progress but not completed** drop-down. The Stuck status appears on the Workflow Execution pages. *See* **Workflow Engine - Manage Workflow Execution** on page 139 *for additional information.*

Workflow Engine - Manage Workflow Triggers

A Trigger is one or more conditions which, when satisfied, initiates a workflow. Employees are enrolled in a workflow by setting Initiation Triggers. You can manage triggers from any Workflow page.

To create Workflow Triggers, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY, select the ellipses for the appropriate workflow, and click **Edit**. Select the **CREATE TRIGGERS** button.

To edit Workflow Triggers, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW LIBRARY, select the ellipses for the appropriate workflow, and click **Edit**. Select the **CREATE TRIGGERS** button.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Engine - Workflow Library - Manage	Grants access to view, edit, and publish workflows in the Workflow Library. This is an administrator permission.	Workflow Engine

Select one or more of the following Triggers:

- Employee Self-service - Allows an employee to self-initiate the workflow for themselves as the target. This can be triggered from the Universal Profile's options dropdown.
- Manager Self-service - Allows a manager to initiate the workflow for their direct and in-direct reports as the target.
- Admin initiated - Allows an authorized user to initiate the workflow for any employee within their line of site, based on permissions and constraints.

Click **SAVE** to save the Triggers.

Workflow Engine - Publish Workflows

Once a workflow is configured, you can publish it. If a workflow in not correctly and completely configured, an error message appears and you cannot publish until all errors are corrected.

***Note**: If you leave a workflow before it is published, it is automatically saved as draft to the Workflow Library.*

To publish a Workflow, click the Publish button on any Workflow page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Engine - Workflow Library - Manage	Grants access to view, edit, and publish workflows in the Workflow Library. This is an administrator permission.	Workflow Engine

Assign Workflows

Workflow Engine - Assign Workflows

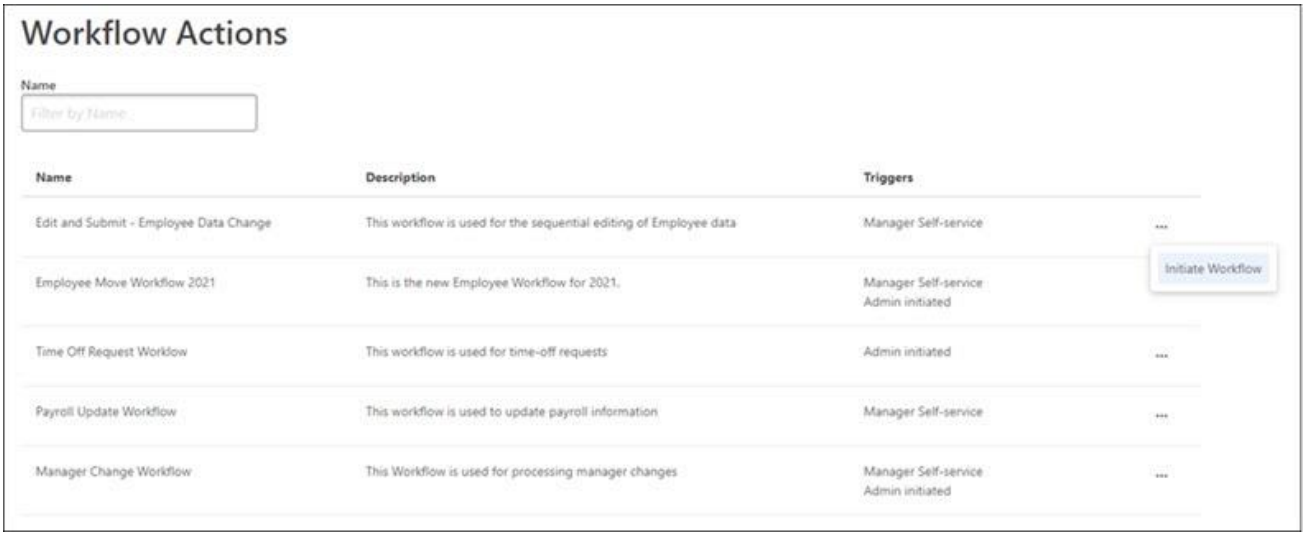
Use the Workflow Engine Workflow Actions page or the Universal Profile page to assign workflows. The workflows that appear on each page depend on the triggers set when editing or creating the workflow. *See* **Workflow Engine - Manage Workflow Triggers** on page 134 *for additional information.*

To access the Universal Profile page, go to HOME > UNIVERSAL PROFILE. Click the **Actions** page.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Engine - Initiate Workflows	Grants ability to initiate the first step of a workflow.	Workflow Engine

Note: Workflow Engine - Initiate Workflows permission applies to assigning workflows through the Universal Profile.



Self-assign Workflows

Use the Universal Profile page to self-assign workflows with triggers set to Employee self-service. There are several ways to initiate a workflow in the Universal Profile. This procedure uses the Universal Profile actions page.

To self-assign workflows:

1. On the Action page, click the ellipses next to View Teams and select Initiate a Workflow. The Initiate a Workflow page opens to display active workflows with Employee self-service triggers.
2. Click **Start** for the appropriate workflow. Forms and Approval activities within workflows generate Actions and Requests in the corresponding Universal Profile pages.

Workflow Execution

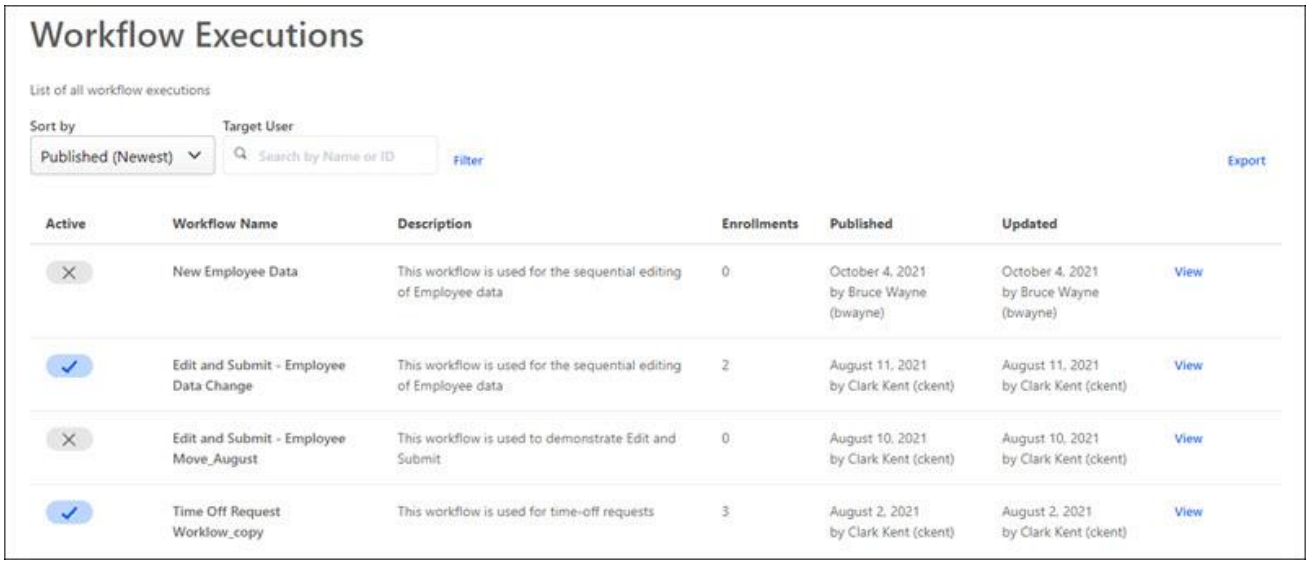
Workflow Engine - Manage Workflow Execution

Use the Workflow Executions page to track the execution of workflows in a portal. You can activate or inactivate an execution, view a list of users enrolled in the workflow, export the workflow records to a spreadsheet, terminate a workflow, and reassign an activity for a user.

To access the Workflow Executions page, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW EXECUTION.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Executions - Manage	Grants access to manage Workflow Executions.	Workflow Engine



Search for Workflows

Use the following fields to search for specific workflows:

- **Sort by** - Sort workflows by Updated (Newest), Updated (Oldest), Created (Newest), Created (Oldest)
- **Targeted User** - Search by the name of the user who is the subject of the workflow, even if they are not assigned any activities.

Workflow Executions Table

The Workflow Executions table contains the following information:

- Active - Shows if the workflow is active or inactive.
- Workflow Name - The name of the workflow.
- Description - The description of the workflow.

- Enrollments - The number of enrollees in a workflow.
- Published - The workflow publish date and who published.
- Updated - The date the workflow was updated an who updated.

View

Click **View** to open a workflow record page that displays the user's name, enrollment date, enrollment duration, and user status for users enrolled in the workflow.

Click **View** on the workflow record page to open the selected user's Workflow Instance page. For the selected user you can view each activity in the workflow, who is assigned to the activity, completion dates, duration, and status of each activity. You can also terminate or reassign an activity for a user.

Export

Click Export to download the workflow records for all workflows to a comma separated value (.csv) file. The following information is downloaded to the .csv file:

- Workflow Name
- Workflow Description
- Target User First Name
- Target User Last Name
- Target User ID
- Workflow Enrollment Date
- Duration Days
- Workflow Status
- Workflow Instance Last Updated

Workflow Engine - Reassign an Activity

Administrators can use the workflow instance page to reassign an activity.

***Note**: You cannot reassign activities in Completed status.*

To access a user's workflow instance page, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW EXECUTION.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Executions - Manage	Grants access to manage Workflow Executions.	Workflow Engine

To terminate a workflow:

1. On the Workflow Executions page, click **View** for the workflow you want to terminate. The page of targeted users enrolled in the workflow opens.
2. Click **View** for the appropriate user. The user's workflow instance page opens.
3. Click the ellipses for the appropriate activity and select **Reassign**. The activity is reassigned to the selected user.

Workflow Engine - Terminate a Workflow

Administrators can use the workflow instance page to terminate a workflow for a specific user. Once the workflow instance is canceled, further activities in the workflow execution will not be assigned.

***Note**: You can only terminate In Progress workflows.*

To access a user's workflow instance page, go to ADMIN > TOOLS > CORE FUNCTIONS > WORKFLOW MANAGEMENT > WORKFLOW EXECUTION.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Workflow Executions - Manage	Grants access to manage Workflow Executions.	Workflow Engine

To terminate a workflow:

1. On the Workflow Executions page, click **View** for the workflow you want to terminate. The page of targeted users enrolled in the workflow opens.
2. Click **View** for the appropriate user. The user's workflow instance page opens.
3. Click the **Terminate Workflow** button.

Learning

Ability to Resubmit a Stuck Roster

Ability to Resubmit a Stuck Roster

Occasionally, an instructor-led training (ILT) roster submitted by an administrator or instructor can get stuck while processing. Prior to this enhancement, when this occurred and the administrator or instructor returned to the roster submission page, they would continue to see the message "Not available - roster is being updated," even though they submitted the roster several hours ago.

With this enhancement, administrators and instructors can unstick a roster that has been stuck processing for more than 24 hours, via a new pop-up available on the Submit Roster page. The administrator or instructor can refresh the page using the pop-up and then resubmit the roster using the **SUBMIT** button.

Considerations

If a roster remains stuck even after it has been resubmitted, it may still be necessary to open a case with Global Customer Support.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

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

Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.	Learning - Administration

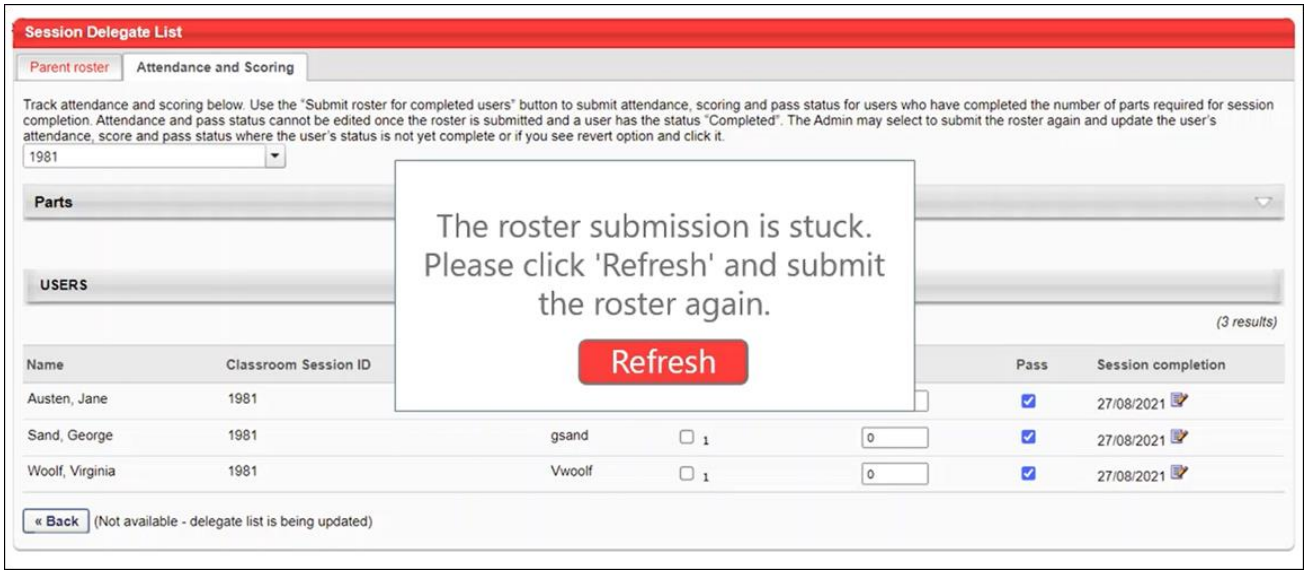
Refresh and Resubmit Session Roster

With this enhancement, administrators and instructors can resubmit a roster that has been stuck processing for more than 24 hours.

To access the ILT session roster, go to ILT > MANAGE EVENTS & SESSIONS. Search for the appropriate event and next to the event in the search results, in the Options column, click the View Sessions icon. Next to the appropriate session, in the Options column, click the View Roster icon.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.	Learning - Administration
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.	Learning - Administration
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.	Learning - Administration



If a session roster has been stuck processing for over 24 hours, a pop-up will appear to the administrator on the Roster page, alerting them that their roster is stuck. The administrator can click the **REFRESH** button to refresh the Roster page, and after the page has refreshed, the administrator can resubmit the session roster using the **SUBMIT** button.

Note: *If the roster remains stuck even after refreshing the page and resubmitting the roster, it may be necessary to open a case with Global Customer Support.*

Accept Progress for Online Content Launched Externally

Accept Progress for Online Content Launched Externally

Prior to this enhancement, when a learner consumed online content directly from an integrated provider's site, their course progress and course completion were not recorded in their Cornerstone transcript.

With this enhancement, all progress data for online content launched directly from an integrated provider's site is automatically recorded to the learner's Cornerstone transcript and within Cornerstone reporting functionality, just as if they had launched the course from within the Cornerstone system. The progress data will match the data provided by the content provider's site. Consequently, this enhancement allows for real-time progress data visibility in a single system of record. ***Note:*** *The online content consumed directly from an integrated content provider must also be present in the Course Catalog in order for the external progress to be recorded to the learner's Cornerstone transcript.*

Considerations

This enhancement applies to the following integrated content providers:

- Coursera
- edX
- Udemy
- Percipio

Exclusions

- Only the following two training statuses are supported by this integration:
  - In Progress
  - Completed
- A Completed status cannot be reverted back to an In Progress status. Any progress data communicated after the online content completion will update all values except completion status and completion date.
- Historical completion records for external launches, which were NOT supported by the Cornerstone system prior to this enhancement, will not appear on the Cornerstone transcript following this enhancement.

Implementation

This functionality is turned on by default for all portals using the Learning module. If an organization is not currently using an integrated content provider but decides to use an integrated content partner in the future, the functionality of this enhancement will automatically be available.

Ability to Remove Training for Managers

Ability to Remove Training for Managers

Prior to this enhancement, it was not possible for managers to remove training they had assigned to their employees from their employees' transcripts. The intervention of an administrator was needed to remove the training from the user's transcript.

With this enhancement, managers can be granted the ability to remove training they assigned to their employees from their employees' transcripts. These abilities are permission-based.

FAQ

Q: How does this functionality differ from the existing *Remove Training* permission?

A: The existing *Remove Training* permission, when granted to a user, gave that user the ability to remove training from any user in the system. If the permission was assigned to a manager, that manager was not limited to removing training only from their employees. The new *Remove Assigned Training from Transcript* permission only allows managers to remove training from the transcripts of their own employees.

Q: What is directly-assigned training?

A: Directly-assigned training is defined as training that a manager has individually assigned to a user themselves, using the **Assign** option. Training assigned through tools like the Learning Assignment Tool is NOT considered directly-assigned training.

Q: Can training with a due date be removed?

A: Yes, training with a due date can be removed.

Q: Can any emails be triggered by training self-removal?

A: No, there are no emails triggered when a user removes self-requested training from their own transcript.

Q: Does this feature give managers access to the Removed tab of their employees' transcripts?

A: No, only administrators will continue to have access to the Removed tab of users' transcripts.

Q: Can managers remove training from their employees' transcript via other system locations, such as Learner Home?

A: No, managers can remove training from their employees' transcripts via the Transcript page only.

Considerations

The following considerations apply to this functionality:

Training Type Considerations

The following training types are supported for manager removal:

- Curricula
- Events and sessions

- External content
- External training
- Libraries
- Materials
- Online classes
- Online content
- Quick courses
- Tests
- Videos

The following training types are NOT currently supported for manager removal:

- Assessments
- Certifications
- Programs and cohorts

Note: *It is NOT possible for administrators to modify which training types are eligible for manager removal.*

Training Status Considerations

Training must be in the following training statuses in order for managers to remove it from their employees' transcripts:

- All statuses within the Not Started category
- All statuses within the In Progress category

Training in the following training statuses CANNOT be removed from employee transcripts by managers:

- All statuses within the Completed and Completed Equivalent category (i.e. Equivalent, Exempt, Expired, Discontinued, Not Activated, etc)

Note: *It is NOT possible for administrators to modify which training statuses are eligible for manager removal.*

For more information about which training statuses are included in each category: *See Transcript Status Groups for Reporting.*

Implementation

This functionality is enabled by default in all portals using the Learning module, but managers must be assigned the relevant new permission in order to have the ability to remove assigned training from employees' transcripts.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Remove Training - Directly Assigned	Allows a manager to remove directly-assigned training from their employee's transcript. This permission can be constrained by the following criteria: ○ User's Direct Subordinates ○ User's Direct Reports ○ User's Self ○ Employee Relationship ○ User's Subordinates ○ User Self and Subordinates ○ User's Defined OUs	Learning

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. On the Learner Home page, this permission also allows end users to view the **Completions & Hours** field, the training sidebar, and the Continue Learning carousel. This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. ***Note:*** *For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.*	Universal Profile

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

Remove Training from User's Transcript

Managers can be granted the ability to remove training they assigned to their employees from their employees' transcripts. To give managers this ability, an administrator can assign the *Remove Training - Directly Assigned* permission to them.

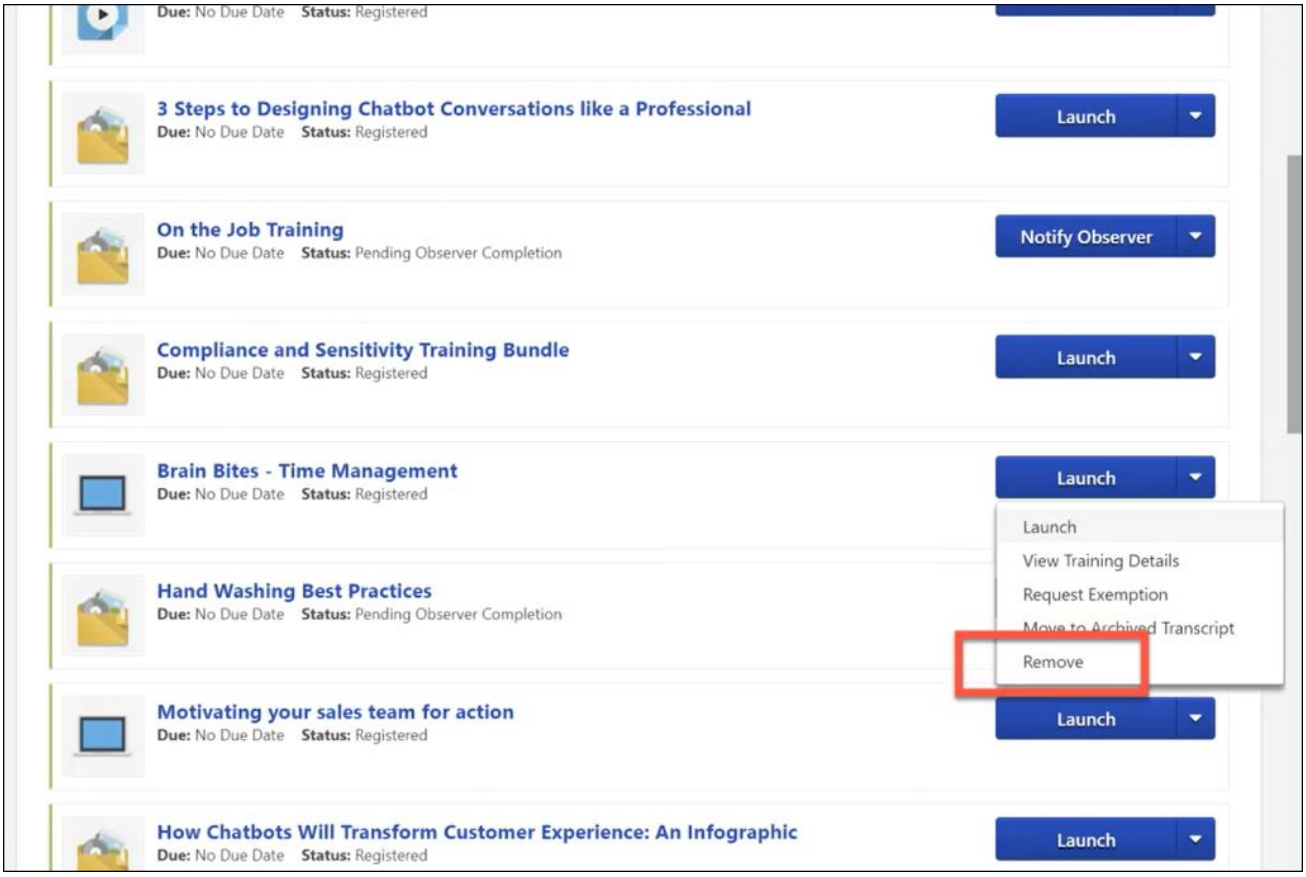
To access a user's Transcript page, go to HOME > UNIVERSAL PROFILE. Click the name of the employee for whom you want to remove training and then navigate to the user's Transcript tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. On the Learner Home page, this permission also allows end users to view the **Completions & Hours** field, the training sidebar, and the Continue Learning carousel. This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. ***Note:*** *For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.*	Universal Profile
Remove Training - Directly Assigned	Allows a manager to remove directly-assigned training from their employee's transcript. This permission can be constrained by the following criteria: ○ User's Direct Subordinates ○ User's Direct Reports ○ User's Self ○ Employee Relationship ○ User's Subordinates ○ User Self and Subordinates	Learning

	○ User's Defined OUs	

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

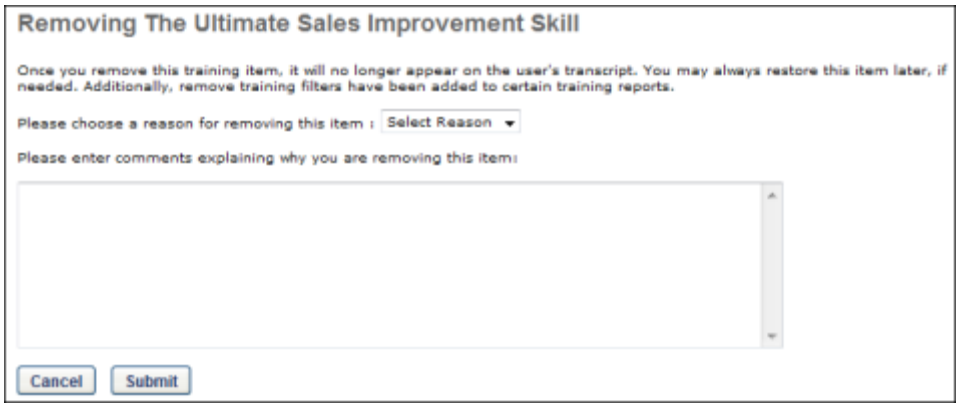


Remove

After a manager has assigned training to one of their employees, the manager can, if needed, remove that training by navigating to the employee's transcript and selecting the **Options** drop-down menu to the right of the training. If the manager has permission to remove assigned training, a **Remove** link is available in the drop-down. The manager can click the **Remove** link to remove the training from their employee's transcript. This opens the Remove Training pop-up, in which the manager must populate the following fields:

- **Select Reason** - Select the reason for removing the training. This is required. ***Note:*** *Reasons appear in the user's display language, when available. If the user's display language is not available, then the reason appears in the reason's default language.*
- **Comments** - In the field, enter additional comments regarding the training removal. Depending on the selected reason, this may be required.

When the manager has finished populating the above fields, they can click the **SUBMIT** button, and the training item will be removed from the user's transcript. If the user does not wish to finalize the training removal, they can click the **CANCEL** button and return to the Transcript page, and the training will not be removed.



Audit Trail Enhancements (Early Adopter)

Audit Trail Enhancements (Early Adopter)

In February 2020, Cornerstone released an audit trail solution for a limited number of customers. This solution added additional fields to training and transcript auditing and provided a PDF export solution to display these training and transcript audits.

With the October '21 release, this Early Adopter solution is being made available to more customers, with some feedback-based improvements. These audit trail enhancements, which allow administrators to track changes to training and transcripts via exportable reports, are beneficial to organizations in regulated industries where detailed training tracking is needed. Included with this enhancement:

- Ability to track instructor-led training (ILT)
- Ability to capture training active status changes in audit reports
- Ensuring user information is consistent in reports
- Ensuring changes in training active status appear consistently

Audit Trail Overview

The Generate Audit PDF feature was previously only available to a limited set of Life Science customers. The Generate Audit PDF feature enables customers to generate a PDF export of the audit trail for the following training types and fields:

- Online Courses - Title, Description, Prerequisites, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- Materials - Title, Description, Prerequisites, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields, Start Date, Source (Source changes via the UI and Edge Import do not appear in the report)
- Tests - Title, Description, Attempts Allowed, Time Limit, Passing Score, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- Videos - Title, Description, Prerequisites, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields, Source
- Events - Title, Description, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- Sessions - Instructor, Start Date/Time, End Date/Time, Prerequisites, Pre-work, Post-work, Custom Fields
- Curricula - Title, Description, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- External Training - Title, Description, Institution, Date Range, Attachment
- Transcript Items - Status (to Completed), Status (to Exempted), Score (Online Courses), Score (Tests), Score (Sessions)

Implementation

These enhancements are enabled by default in portals already using audit trail functionality. Audit trail functionality is in an Early Adopter status with the Oct '21 release and can currently only be enabled by request. Please open a case with Customer Support in order to enable audit trail functionality. When enabled, the audit trail reports are accessible via a

Generate Audit PDF link located in users' transcript details and in the Course Console for applicable training items.

Note: *The* **Generate Audit PDF** *link is not available if the Transcript Lockdown functionality is enabled in your portal.*

Permissions

Important: In order to view the **Generate Audit PDF** link for a training item on a user's transcript, a user needs the *View Transcript Item* permission and cannot be the same user whose transcript is being viewed.

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
Course Catalog - View	Grants access to view the learning objects in the course catalog and enables administrators to view the Course Console and the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission can be	Learning - Administration

	constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, and User's LO Availability. This is an administrator permission. Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.	
View Transcript Item	Grants ability to view details of learning objects that appear on the transcript (training record), by clicking on the name of the learning object. Users must also have the Bio About - View permission in order to access the transcript within Universal Profile. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, or User's Self. This is an end user permission.	Learning - Administration

Audit Trail Enhancements

With the Oct '21 release, the following enhancements have been made to audit tracking:

- Ability to track instructor-led training (ILT)
- Ability to capture training active status changes in audit reports
- Ensuring user information is consistent in reports
- Ensuring changes in training active status appear consistently

Tracking ILT Completions

Prior to this enhancement, training completions in the following case were tracked in other areas of the Cornerstone system, but they were NOT tracked in a user's transcript audit report:

- A user completes a session and is marked complete when an administrator or instructor submits the instructor-led training (ILT) roster

With this enhancement, this training completion scenario has been added to audit trail functionality, and data from this scenario is included in users' transcript audit reports.

Capture Training Active Status Changes

Prior to this enhancement, if a future deactivation date was set for a training item in the Course Catalog, and then the Active status was changed for the training item, this change was not captured by the audit report.

With this enhancement, if a future deactivation date is set for a training item in the Course Catalog and then the Active status is changed for the training item, this change to the Active status is captured by the audit report. This enhancement is not retroactive and only applies to changes made to the Active status following the Oct '21 release.

User Information Consistency

Prior to this enhancement, it was not always clear which system user made status changes to users' training, due to lack of consistency in the information included in audit reports.

With this enhancement, the following information is presented about the system user who made status changes to users' training:

- User last name
- User first name
- Username
- Globally unique identifier (GUID)

This allows administrators to use audit reports to see exactly which system users were responsible for changes to training status.

Active Status Consistency

Prior to this enhancement, it was not always easy for administrators to see how the training status had changed, due to some ambiguous wording in audit reports.

With this enhancement, audit reports now display From and To columns to clearly display what status the training changed from and what status the training changed to (i.e. the training changed from Active to Inactive).

Report Title: Curriculum (b924d145-b914-4df9-8aa9-9153e2212f36) MN-Curricula-01 2.0 Audit

Field Name	From	To	Actor Name	Action Date	Comments
Active	Inactive	Active	Admin,Cornerstone (cesadmin)	13/07/2021 04:52:20 AM	
Active	Active	Inactive	Admin,Cornerstone (cesadmin)	13/07/2021 04:52:14 AM	

Audit Trail Enhancements - Generate Audit PDF

If Audit Trail functionality has been enabled in your portal, administrators can generate audit PDFs from users' transcripts and from the Course Console.

Note: *The* **Generate Audit PDF** *link is not available if the Transcript Lockdown functionality is enabled in your portal.*

Permissions

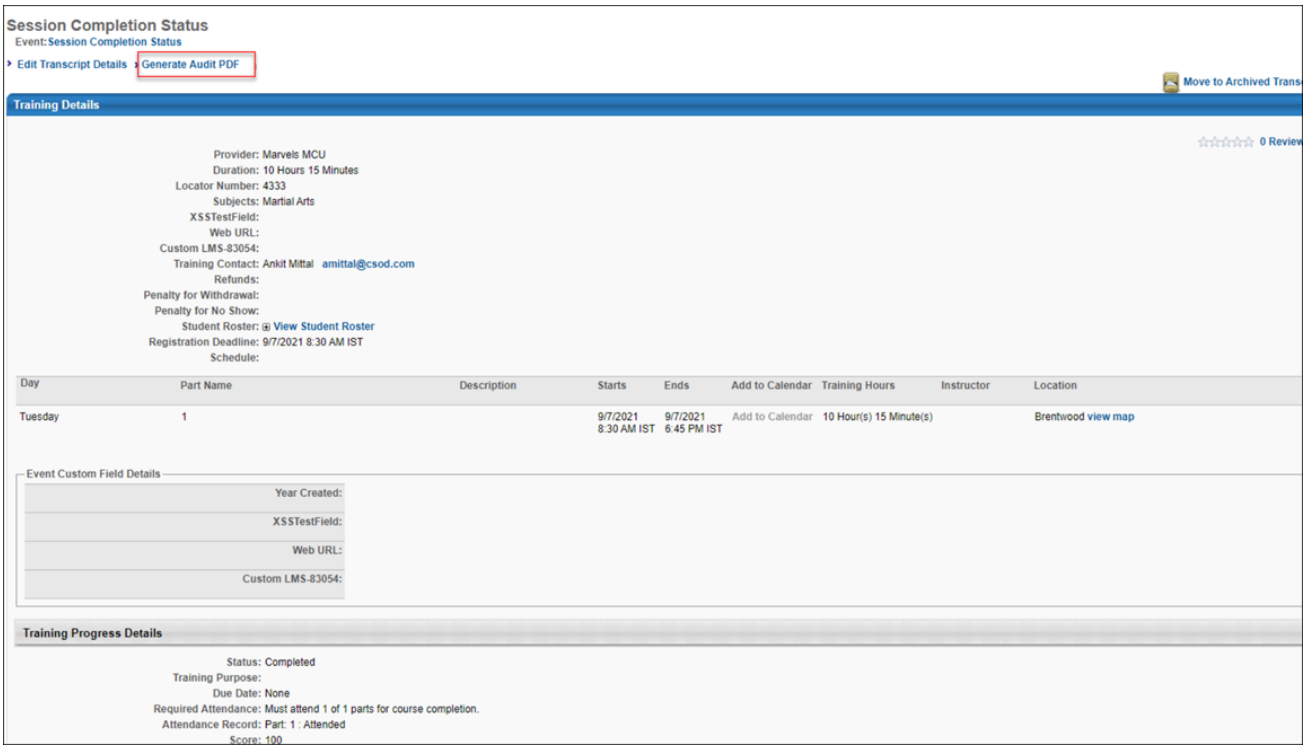
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests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

	Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.	

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

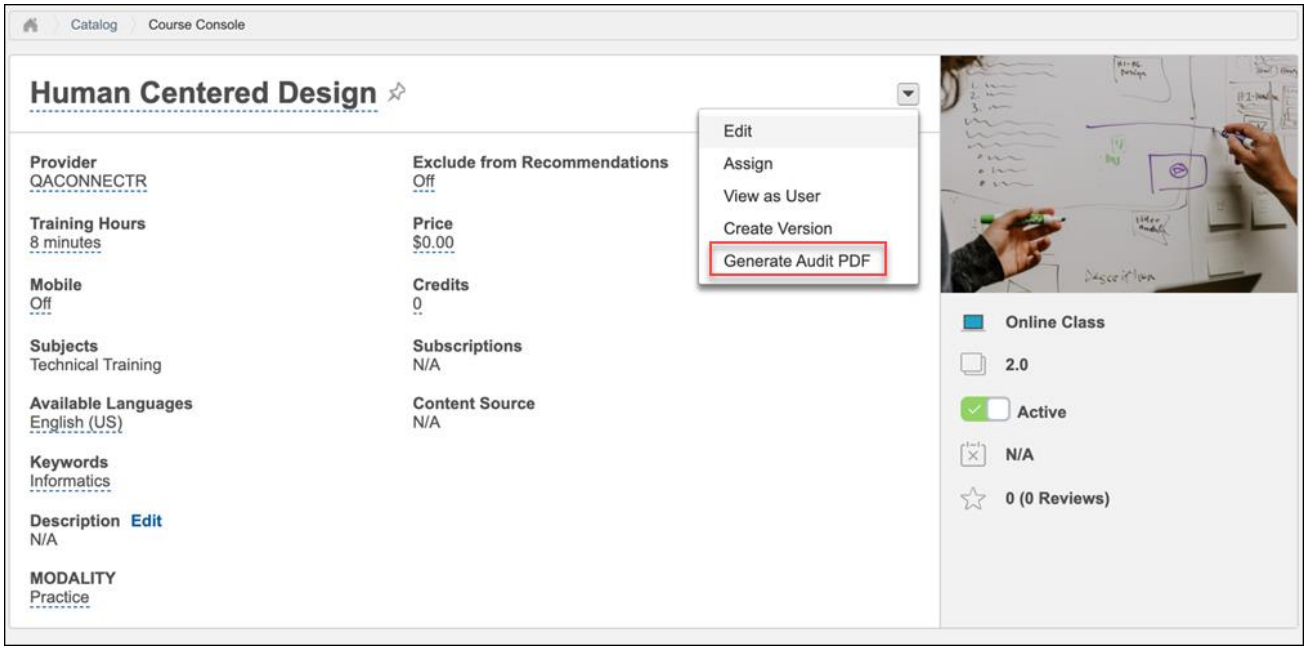
Generate Audit PDF from User Transcript

To generate an audit PDF from a user's transcript, the administrator can access the Training Details page for a training item on the user's transcript and click the **Generate Audit PDF** link located above the Training Details table.



Generate Audit PDF from Course Console

To generate an audit PDF from the Course Console, the administrator can navigate to the Course Console page for a specific training item, click the **Options** drop-down arrow, and then select the **Generate Audit PDF** link.



Audit PDF Report Output

The report output displays detailed information about the training item's history on the user's transcript, including the following information:

- **Field Name** - The field that has changed
- **From** - What the field value changed from
- **To** - What the field value changed to
- **Actor Name** - The name of the user who changed the field value
- **Action Date** - The date the field value was changed
- **Comments** - Any comments an administrator may have provided for the change

Report Title: Mittal, Ankit (amittal, 8E14242C-B41B-4FB6-AAAB-0B92D5AD9BDA), Session (37e40fba-a32e-4bf9-936c-4779a79af88b) 1.0 Audit

Event Title : Session Completion Status
Session Locator Number : 4333

Field Name	From	To	Actor Name	Action Date	Comments
Status	InProgress, RegNum: 1	Completed, RegNum: 1	Mittal, Ankit (amittal, 8E14242C-B41B-4FB6-AAAB-0B92D5AD9BDA)	07/09/2021 02:05:40 PM	
Status	Registered, RegNum: 1	InProgress, RegNum: 1	0	07/09/2021 02:05:29 PM	
Score		100, RegNum: 0	Mittal, Ankit (amittal, 8E14242C-B41B-4FB6-AAAB-0B92D5AD9BDA)	07/09/2021 02:05:27 PM	
Status	Approved, RegNum: 1	Registered, RegNum: 1	Mittal, Ankit (amittal, 8E14242C-B41B-4FB6-AAAB-0B92D5AD9BDA)	07/09/2021 01:52:48 PM	
Status	None, RegNum: 1	Approved, RegNum: 1	Mittal, Ankit (amittal, 8E14242C-B41B-4FB6-AAAB-0B92D5AD9BDA)	07/09/2021 01:52:40 PM	

Applicable Training Types and Fields

The **Generate Audit PDF** link allows customers to generate a PDF export of the audit trail for the following training types and fields:

- Online Courses - Title, Description, Prerequisites, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- Materials - Title, Description, Prerequisites, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields, Start Date, Source (source changes via the UI and Edge Import do not appear in the report)
- Tests - Title, Description, Attempts Allowed, Time Limit, Passing Score, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- Videos - Title, Description, Prerequisites, Pre-work, Post-work, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields, Source
- Events - Title, Description, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- Sessions - Instructor, Start Date/Time, End Date/Time, Prerequisites, Pre-work, Post-work, Custom Fields
- Curricula - Title, Description, Training Equivalents, Language Equivalents, Active/Inactive Status, Custom Fields
- Training - Title, Description, Institution, Date Range, Attachment
- Transcript Items - Status (to Completed), Status (to Exempted), Score (Online Courses), Score (Tests), Score (Sessions)

Curriculum Versioning Enhancement - Removal of Appended Training

Curriculum Versioning Enhancement - Removal of Appended Training

Prior to the Oct ’21 release, when a material or online course contained within a curriculum was versioned with append versioning, and then the material or online course was removed from the curriculum structure, it did not become a standalone training item if it was in a Registered or In Progress status. Instead, the training was not visible when viewing a learner’s transcript, but related email notifications (such as past due notifications) would be sent to the learner for the training. The training was also included in reporting.

With the Oct ’21 release, a new setting has been added to Curricula Preferences, allowing administrators to set the default action for child training versioned with append versioning, at the time of its removal from the curriculum structure. Administrators can either opt to keep the child training as standalone training on the learner’s transcript or remove it from the learner’s transcript. In addition, a toggle for this setting controls whether this default value can be overridden at the curricula level at the time of the training removal.

Considerations

- If the child training is available in the transcript as a standalone item in addition to being contained within a curriculum, and then the administrator chooses to remove the child training while removing the curriculum, no action will be taken on the child training because the child training exists on the user's transcript as a standalone item.
- The training removed from users' transcripts can be viewed in Reporting.
- The options selected by the administrator will be available in audit logs.

Implementation

This functionality is automatically available in all portals using the Learning module. This enhancement does not apply to training versioned prior to the Oct '21 release.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Preferences	Grants ability to configure Curricula Preferences, which grants the ability to allow or disallow the same learning object (LO) from being added to multiple recurring curricula. This permission cannot be constrained. This is an administrator permission.	Learning - Administratio n

Curricula Preferences

A setting on the Curricula Preferences page allows administrators to set the default action for child training versioned with append versioning, at the time of its removal from the curriculum structure. In addition, a toggle for this setting controls whether this default value can be overridden at the curricula level at the time of the training removal.

To manage Curricula Preferences page, go to: ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > CURRICULA PREFERENCES.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Curricula Preferences	Grants ability to configure Curricula Preferences, which grants the ability to allow or disallow the same learning object (LO) from being added to multiple recurring curricula. This permission cannot be constrained. This is an administrator permission.	Learning - Administration

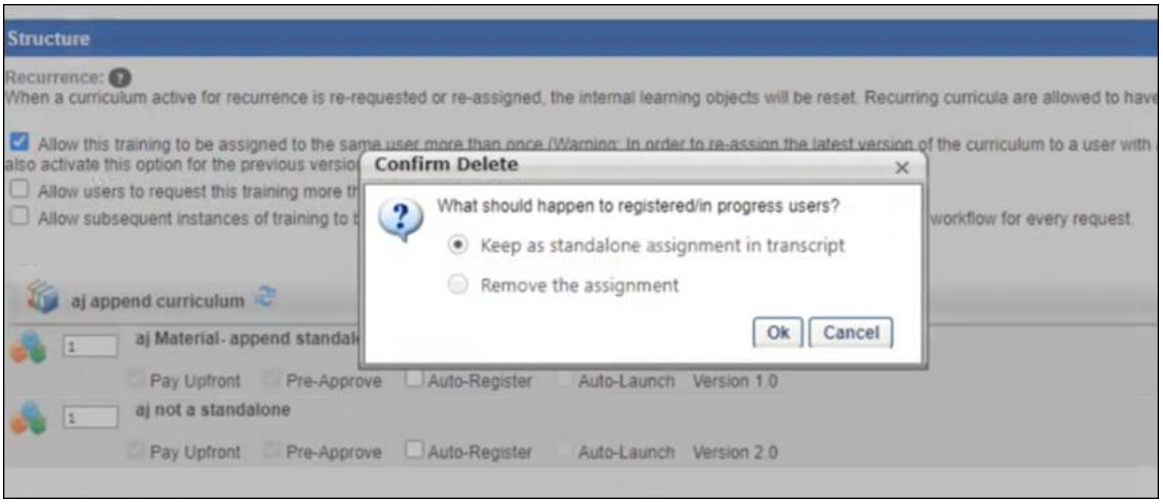
Action on Removal of Older Version LO (for Append Workflow) from a Curriculum

Two options are available for how child training is handled when a material or online course contained within a curriculum is versioned with append versioning, and then the material or online course is removed from the curriculum structure:

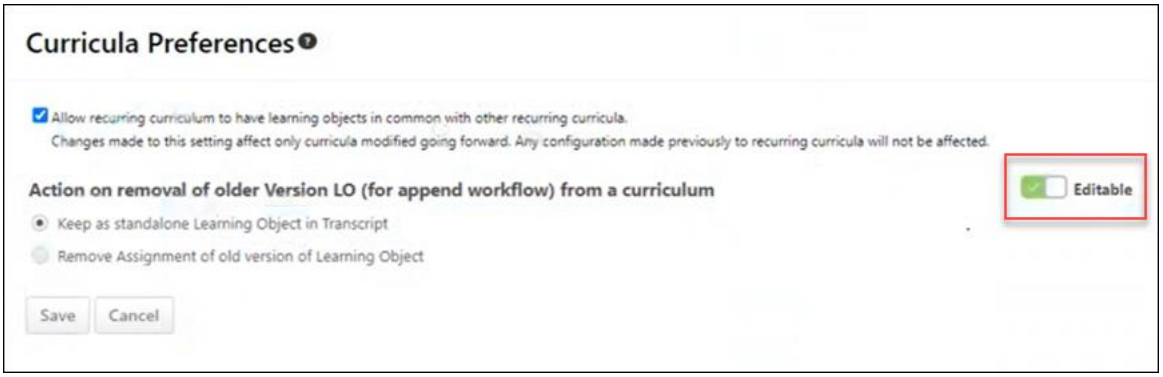
- **Keep as standalone Learning Object on transcript** - If this option is selected, child training is kept as standalone training on the learner's transcript when it is versioned with append and removed from the curriculum structure. This option is selected by default.
- **Remove Assignment of old version of Learning Object** - If this option is selected, the old version of the child training versioned with append is removed from learners' transcripts.

Editable

In addition to the above options, an **Editable** toggle is available. When the **Editable** toggle is enabled, the default setting selected from the **Action on Removal of Older Version LO** section can be overridden at the curricula level at the time of the child training's removal.



If the **Editable** toggle is not enabled, administrators cannot modify this setting at the curricula level at the time of the child training's removal. The **Editable** toggle is disabled by default.



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 an end-of-life in the February ‘22 Release, defects will no longer be fixed, and DLW Learning Loads will no longer be visible or accessible in customer portals. DLW is a legacy data load tool which was built on older technology, is accessed using an older user interface, and experiences slow performance and limited load type support.

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

Existing customers who 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 customers are required to complete their migrations before the February ‘22 Release, which will be the end-of-life date and end-of-support for DLW learning data loads.

Deprecation of MS Lync Integration with May '22 Release

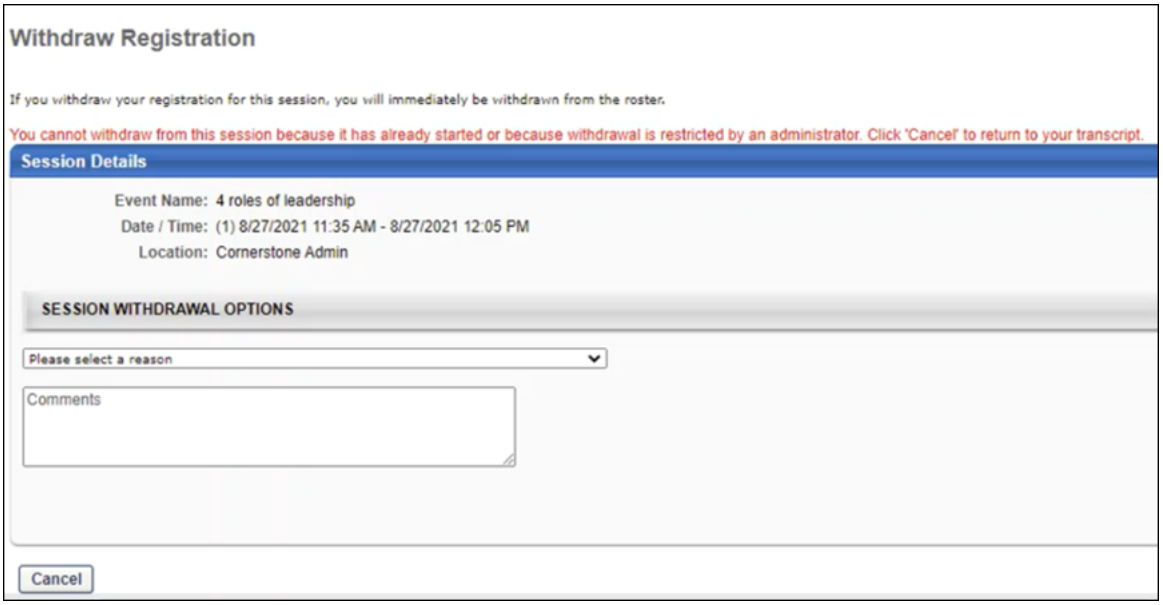
Cornerstone is deprecating the Microsoft Lync Integration with the May ’22 Release. This integration is not currently available in Edge Marketplace and the Microsoft Lync product is no longer supported by Microsoft.

Improved Session Withdrawal Error Message

Prior to this enhancement, a WITHDRAW.SESSION.LINK was released, allowing users to easily withdraw from an instructor-led training (ILT) session by clicking a link included in Session Changed emails, Session Start Date emails, or ILT Session Register emails that they received. However, if the user clicked the WITHDRAW.SESSION.LINK tag after the session had already started, or when session withdrawal was restricted by the administrator, the user would be navigated to the Withdraw Registration page and see a warning message stating, "Restrict withdrawal from sessions." The **SUBMIT** button would be visible but grayed out and not clickable, which could be confusing to the user.

With this enhancement, if the user clicks the WITHDRAW.SESSION.LINK tag after the session has already started, or when session withdrawal has been restricted by the administrator via the **Restrict Withdraw from Session** option in the session details, the user will be navigated to the Withdraw Registration page and see a warning message stating, "You cannot withdraw from this session because it has already started or because withdrawal is restricted by an administrator. Click Cancel to return to your transcript." The **SUBMIT** button is hidden in these two circumstances, and the user can only click the **CANCEL** button.

Note: *This enhancement does not change any instructor-led training functionality; this error merely informs users of why they cannot withdraw from the session.*



Implementation

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

Learning Assessments for Learn App (Open Beta)

Learning Assessments for Learn App (Open Beta)

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 Learning Assessments functionality has continued to evolve during subsequent releases.

Upon the release of this enhancement, learners can access and complete assessments via the Cornerstone Learn app.

Exclusions

The following features are currently out of scope for assessments accessed via the Learn app:

- Searching for assessments using the Learn app's Search functionality
- Timed assessments

Considerations

The following considerations apply to this functionality:

- Learning assessments are still in a beta status, and they can only be accessed in Stage portals at this time.
- All assessments are mobile-enabled by default.

Implementation

Learning Assessments functionality is in an open beta status, and is **only available in Stage portals**. If Learning Assessments have been activated by an administrator, assessments can be accessed via the Learn app by learners. Learners can download the latest version of the Cornerstone Learn app from Google Play or the App store in order to access assessments in their Stage portal.

This functionality applies to iOS version 1.56 and Android version 2.1.8.

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

Permissions

No special permissions are required for learners to view and complete assessments in the Learn app. In order for administrators to manage assessments, the following existing permission is required:

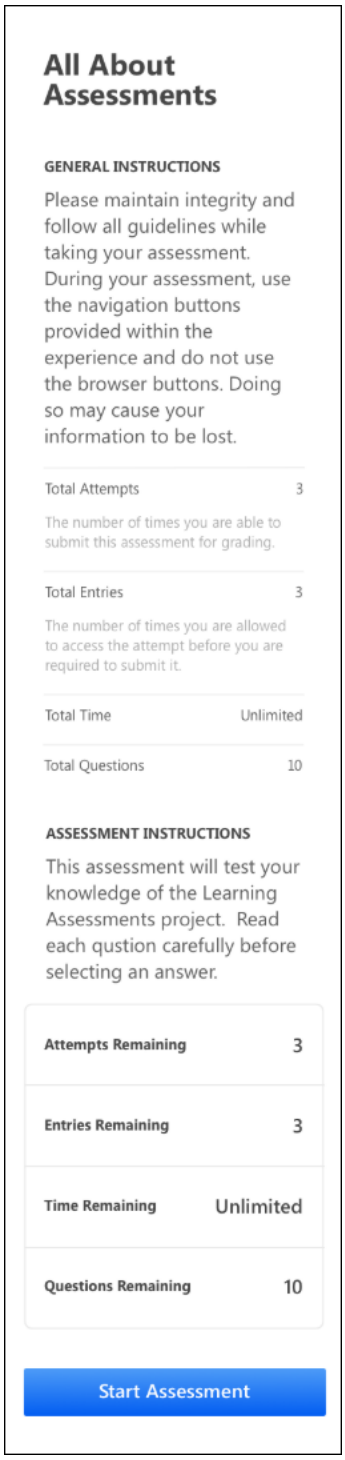
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning Assessments - Manage	Grants access to Learning Assessments (Beta) functionality, which allows administrators to create, edit, publish, and delete assessments in Stage	Learning - Administratio n

	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.	

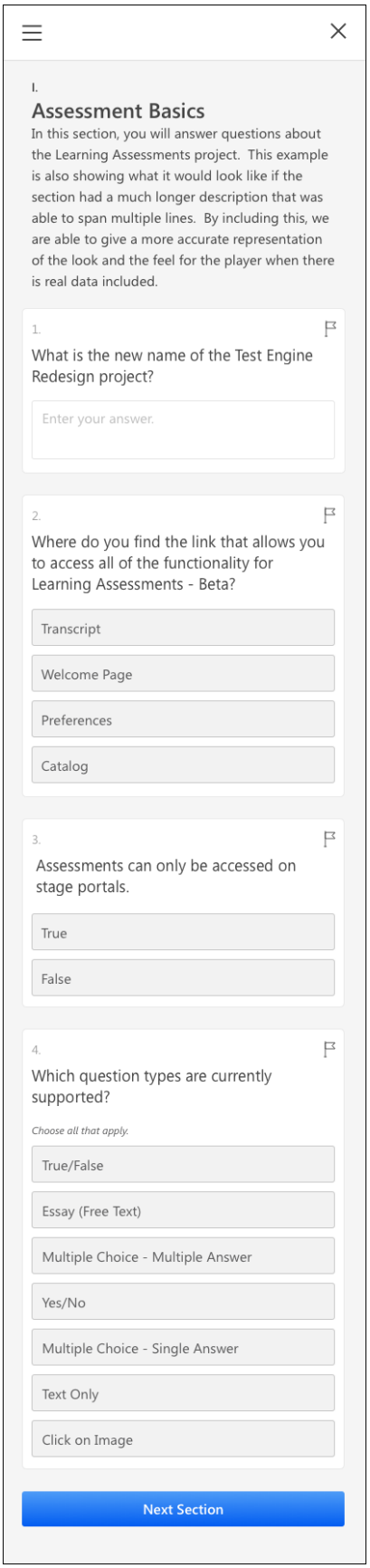
Assessments for App - Assessment Player

Learners can launch assessments in the Learn app in Stage portals. See the images below to view the page layout of various Assessment Player pages when accessed via the Learn app:

Intro Page



Assessment Process


I.
Assessment Basics
In this section, you will answer questions about the Learning Assessments project. This example is also showing what it would look like if the section had a much longer description that was able to span multiple lines. By including this, we are able to give a more accurate representation of the look and the feel for the player when there is real data included.
1.
What is the new name of the Test Engine Redesign project?
Enter your answer.
2.
Where do you find the link that allows you to access all of the functionality for Learning Assessments - Beta?
Transcript
Welcome Page
Preferences
Catalog
3.
Assessments can only be accessed on stage portals.
True
False
4.
Which question types are currently supported?
Choose all that apply.
True/False
Essay (Free Text)
Multiple Choice - Multiple Answer
Yes/No
Multiple Choice - Single Answer
Text Only
Click on Image
Next Section

Navigation Panel

An Assessment Player navigation panel is available on the left side of the screen. 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**:

- **All** - This filter always displays
- **Unanswered** - This filter only displays when there are unanswered questions in the assessment
- **Answered** - This filter only displays when there are answered questions in the assessment
- **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**:

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

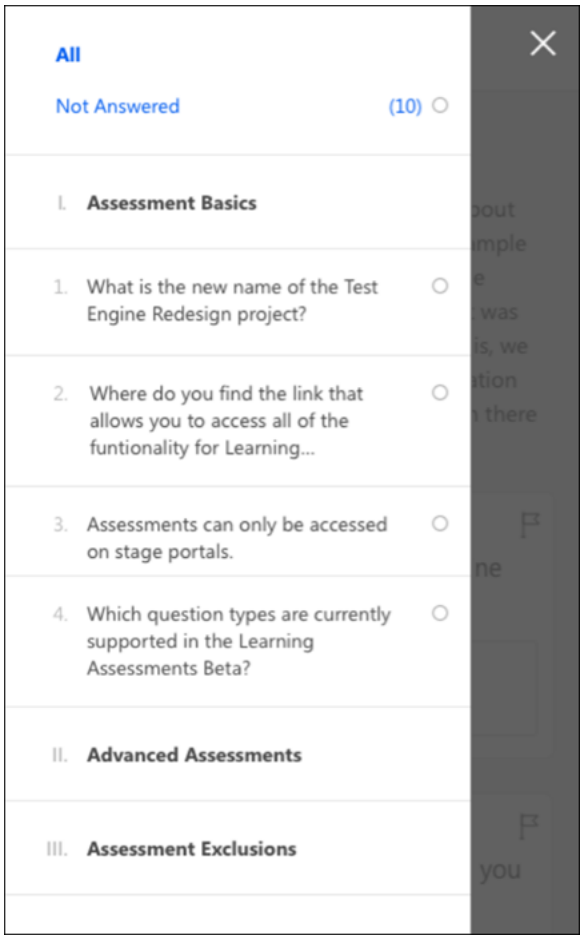
Below the available filters, any questions that meet the selected filter criteria display, organized within their corresponding assessment sections. Each section displays with its name and order number, and sections are collapsed by default. Clicking the section tile

expands the section and reveals the questions within the section that match the user's selected filter criteria.

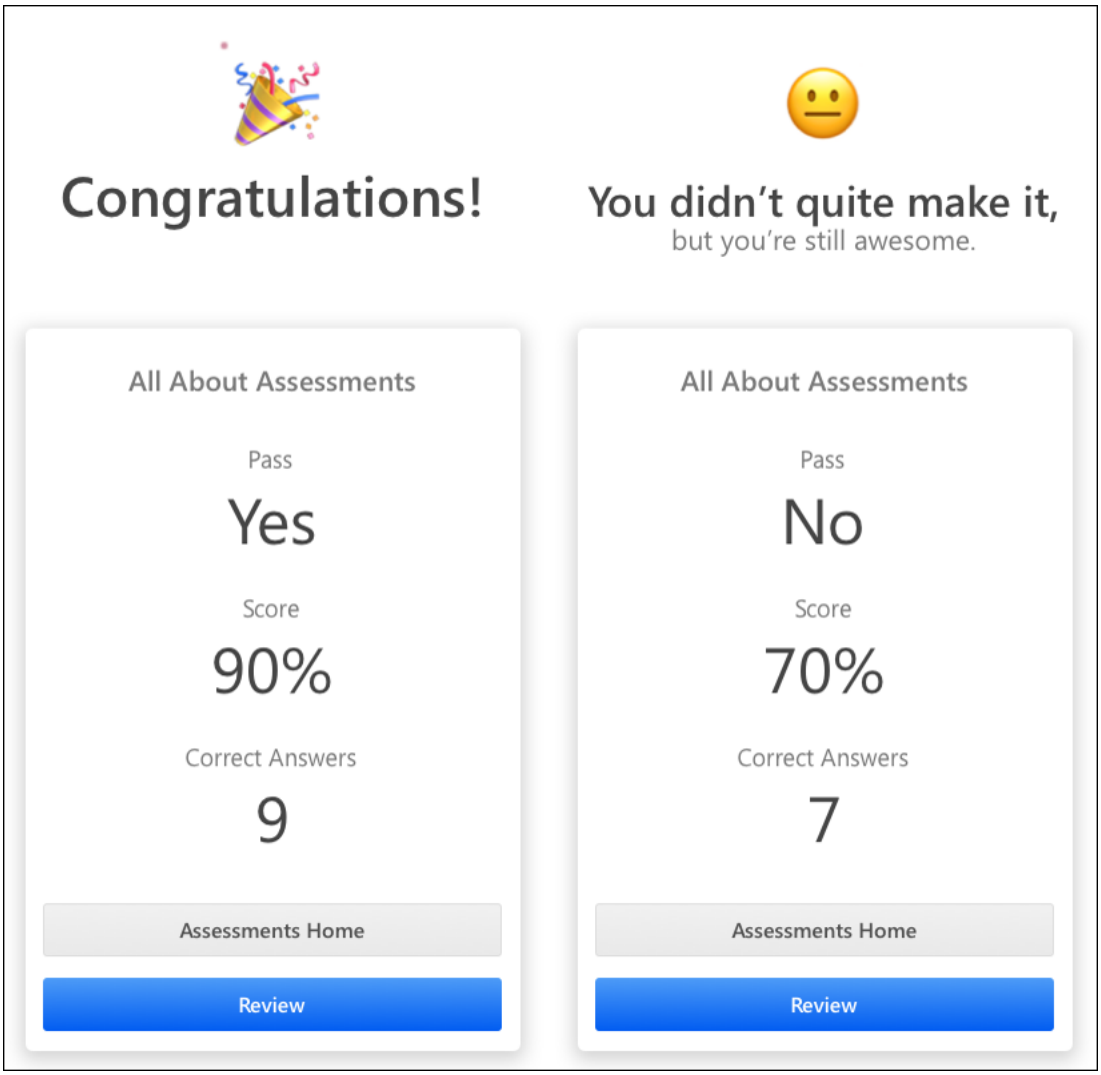
Each question displays in its associate section with their order number and a preview of the question text. Icons display to the right of each question, indicating the question's current status. When taking an assessment, the status icons include:

- **Empty Circle** - Indicates the question is currently unanswered
- **Filled Circle** - Indicates the question has been answered
- **Flag** - Indicates the user has flagged the question for review

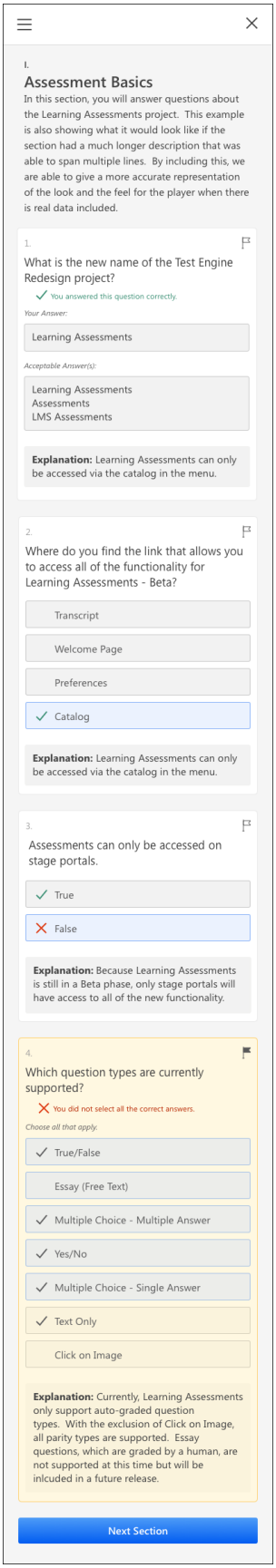
Clicking a question navigates the user to that question in the main Assessment Player area, allowing the user to take action on the question.



Score Page


Congratulations!
All About Assessments
Pass
Yes
Score
90%
Correct Answers
9
Assessments Home
Review
You didn't quite make it,
but you're still awesome.
All About Assessments
Pass
No
Score
70%
Correct Answers
7
Assessments Home
Review

Review Page

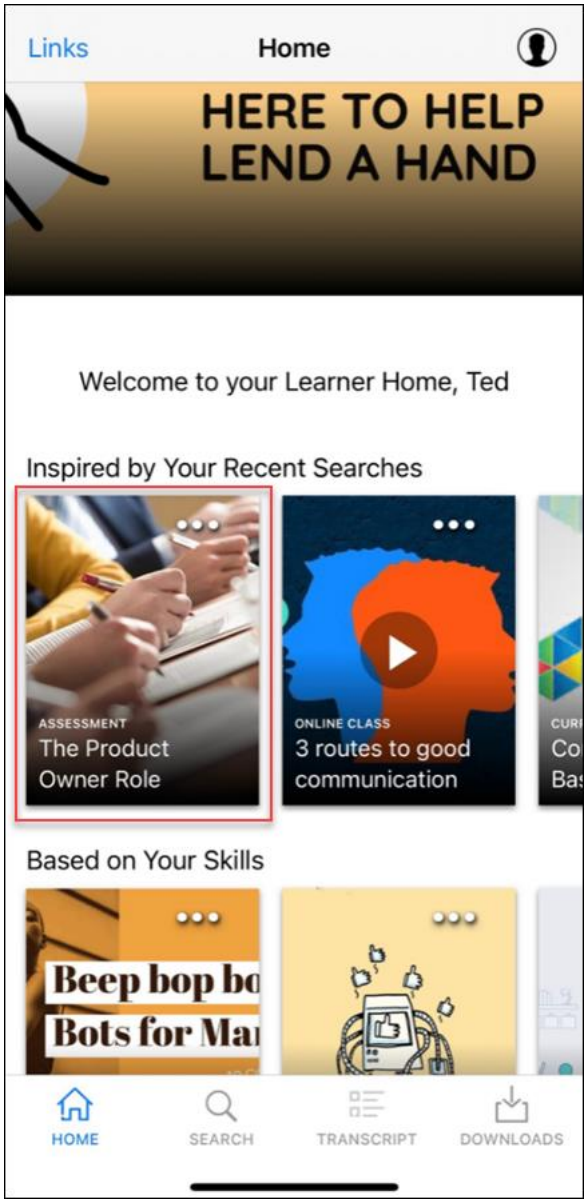

I.
Assessment Basics
In this section, you will answer questions about the Learning Assessments project. This example is also showing what it would look like if the section had a much longer description that was able to span multiple lines. By including this, we are able to give a more accurate representation of the look and the feel for the player when there is real data included.
1.
What is the new name of the Test Engine Redesign project?
You answered this question correctly.
Your Answer:
Learning Assessments
Acceptable Answer(s):
Learning Assessments
Assessments
LMS Assessments
Explanation: Learning Assessments can only be accessed via the catalog in the menu.
2.
Where do you find the link that allows you to access all of the functionality for Learning Assessments - Beta?
Transcript
Welcome Page
Preferences
Catalog
Explanation: Learning Assessments can only be accessed via the catalog in the menu.
3.
Assessments can only be accessed on stage portals.
True
False
Explanation: Because Learning Assessments is still in a Beta phase, only stage portals will have access to all of the new functionality.
4.
Which question types are currently supported?
You did not select all the correct answers.
Choose all that apply.
True/False
Essay (Free Text)
Multiple Choice - Multiple Answer
Yes/No
Multiple Choice - Single Answer
Text Only
Click on Image
Explanation: Currently, Learning Assessments only support auto-graded question types. With the exclusion of Click on Image, all parity types are supported. Essay questions, which are graded by a human, are not supported at this time but will be inlcuded in a future release.
Next Section

Learning Assessments for Learn App - Learner Home

On the Learner Home page of the Learn app, assessments can appear as recommendations within the Learner Home carousels. Each assessment appears in the carousel as a tile with the following information:

- Training type
- Thumbnail image
- Training title

The learner can tap the assessment's tile to navigate to the Learning Details page for the assessment. From there, the learner can launch and complete the assessment in the app.



Learning Assessments for Learn App - Learning Details Page

The Details page for learning assessments provides learners with information about the assessment and allows learners to launch assessments that have been added to their transcript.

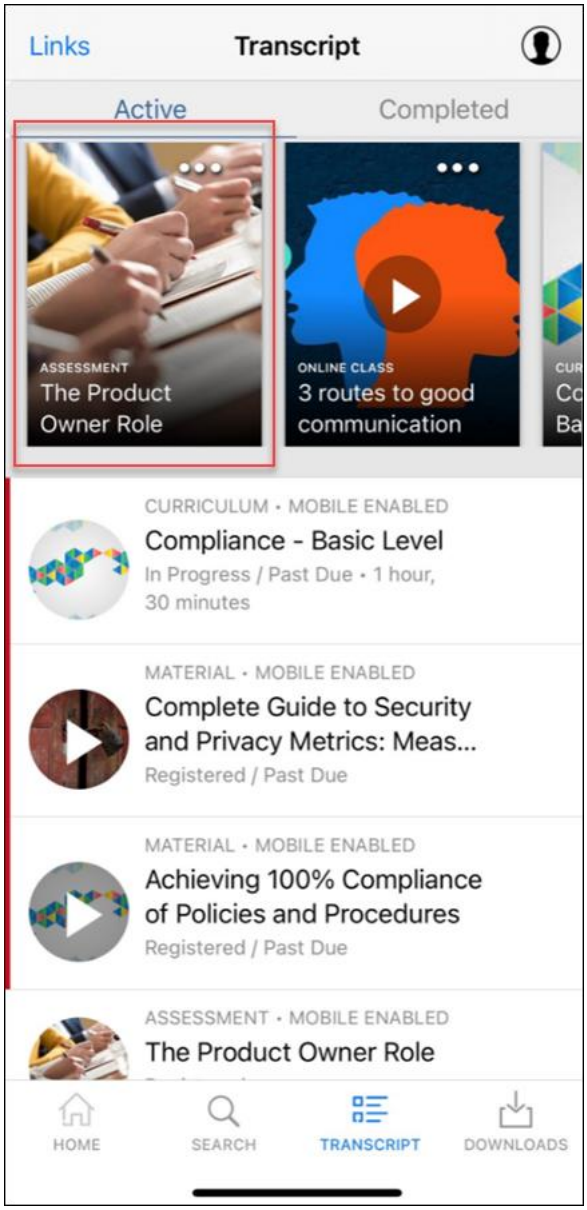
The following actions may be available for the assessment, depending on whether the learner has taken the assessment before, and whether the learner is allowed to retake the assessment.

- Launch
- Retake
- Review
- View Details

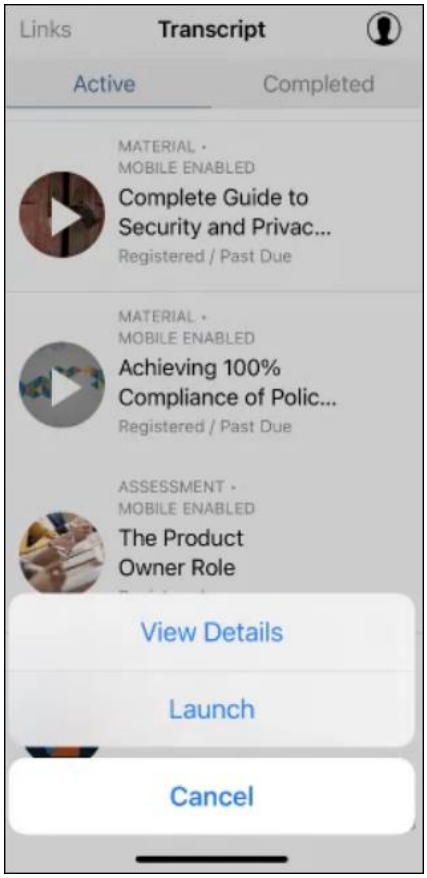
Learning Assessments for Learn App - Transcript

Learners can access assessments assigned to them in the Learn app by navigating to their transcript. On the transcript page, the assessment displays with the following information:

- Training type
- Thumbnail image
- Training title
- Transcript status



The learner can tap the assessment tile to launch and complete the assessment.


Links
Transcript
Active
Completed
MATERIAL •
MOBILE ENABLED
Complete Guide to
Security and Privac...
Registered / Past Due
MATERIAL •
MOBILE ENABLED
Achieving 100%
Compliance of Polic...
Registered / Past Due
ASSESSMENT •
MOBILE ENABLED
The Product
Owner Role
View Details
Launch
Cancel

Learning Assessments Enhancements (Open Beta)

Learning Assessments (Open 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 Learning Assessments functionality has continued to evolve during subsequent releases.

The expansion of the Learning Assessments open beta continues with the addition of assessment versioning. Assessments can now exist in the following three states:

- Draft
- Current Version
- Older Version

Two types of changes can be made to current versions of assessments:

- Textual (does not require new version)
- Structural (requires new version)

In addition, a Question Bank for assessment questions will be made available, along with a Categories Home page. This functionality will allow administrators to create, manage, and categorize assessment questions which can be used in multiple assessments. This functionality will be made available during a post-release patch. Additional release documentation will be provided for these features at that time.

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:

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

The following features are currently out of scope for assessments accessed via the Learn app:

- Searching for assessments using the Learn app's Search functionality
- Timed assessments

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.*

If Learning Assessments have been activated by an administrator, assessments can be accessed via the Learn app by learners. Learners can download the latest version of the Cornerstone Learn app from Google Play or the App store in order to access assessments in their Stage portal. This functionality applies to iOS version 1.56 and Android version 2.1.8.

For more information about earlier phases of this beta project, released in February 2020, August 2020, October 2020, and February 2021, please see the below documentation:

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning 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.	Learning - Administration

	This permission can be constrained by OU, User's OU, User, User's Self, and User's Subordinates. This is an administrator permission.	

Learning Assessments (Open Beta) Enhancements - Versioning

With this enhancement, assessments can exist in three states:

- **Draft**
  - Draft assessments have not yet been published
  - Draft assessments can be created when creating a brand new assessment before publishing, or when creating a new version of an existing assessment before publishing
  - Publishing a draft will promote it to the next version number
  - Each assessment can have only one draft
  - An assessment cannot return to draft state once published
  - Any changes made to a draft can be saved as a draft or published as a new version. If published, the draft will replace the current version and will trigger an audience selection.
- **Older Version**
  - Older versions are View Only and cannot be edited
  - Older versions will exist when a new version of an existing assessment is created
- **Current Version**
  - The current version is the most recently created version
  - A new version can be created from the current version by making structural changes to the assessment
  - Text changes can be made to the current version without creating a new version, if needed

Textual Changes vs. Structural Changes

Two types of changes can be made to assessments:

- Textual
- Structural

Making textual changes to an assessment does not require a new version. Making structural changes to an assessment DOES require a new version of the assessment.

Textual Changes

Textual changes are any changes to a text field that does not alter the overarching structure of the assessment. Textual changes include:

- All metadata fields, such as title and description
- Section names and descriptions
- Question text and explanations
- Answer choices text (***Note:*** *Answer choice text for the Text Only question type cannot be changed without creating a new version*)

After making textual changes to the current version of an assessment, the administrator can save the assessment without creating a new version. The changes made will be visible to the learners assigned to that version.

Structural Changes

Structural changes are substantive changes that fundamentally alter the structure of an assessment. Structural changes include:

- Changing the settings (number of attempts, entries, passing score, etc.)
- Adding or deleting a section, question, or answer choice
- Reordering sections, questions, or answer choices
- Changing the answer choice to a Text Only question
- Changing the correct answer to a question

Making any of the above types of changes require the administrator to create a new version of the assessment. Administrators are prompted to choose which learners receive the newest version of an assessment:

- Any combination of transcript statuses can be selected, including Not Started, In Progress (which includes Failed), or Completed.
- If no statuses are selected, only new assignments will receive the new version.
- Selection of individual users, organizational units (OUs), or groups outside of the above statuses are not supported.

Considerations

- No changes can be made to older versions of an assessment. Changes can only be made to the current version.
- Any changes can be made to a draft assessment without triggering a new version.
- Only textual changes can be made to a current version without triggering a new version. To make structural changes to the current version of an assessment, the administrator must click the **CREATE VERSION** button.

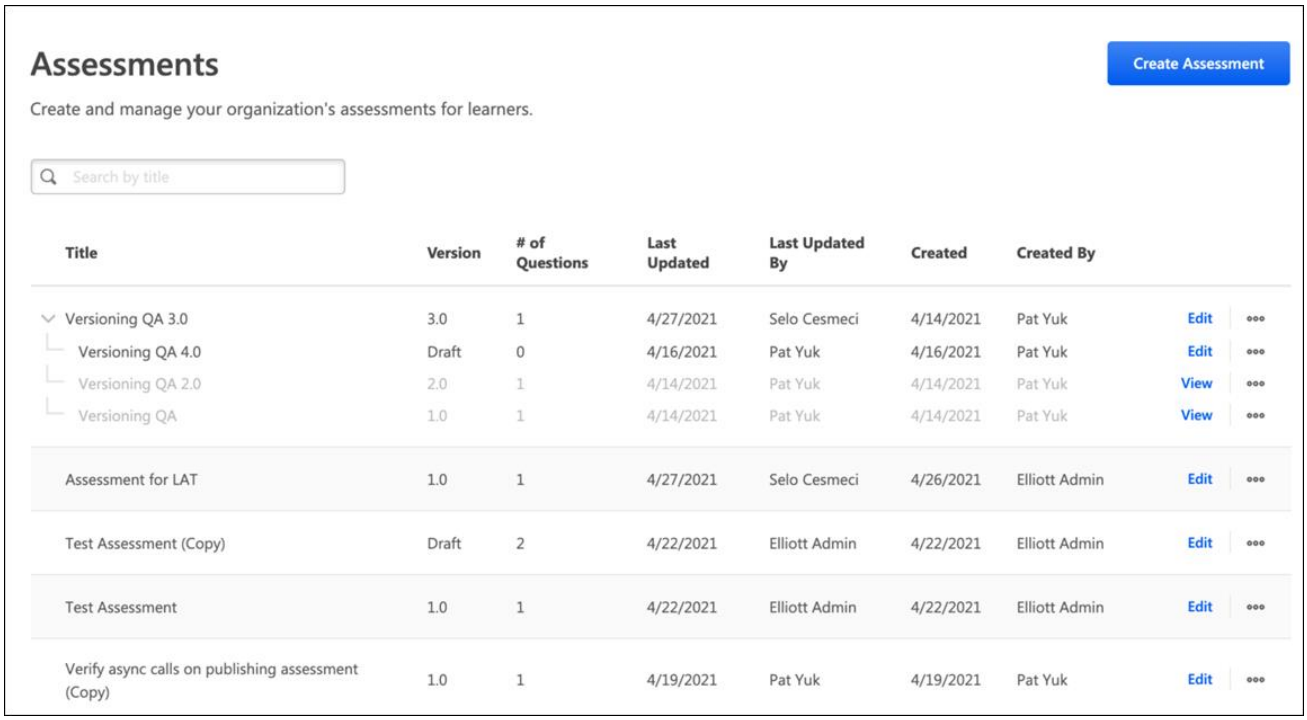
Assessments Home

Each assessment displays as a line item on the Assessments Home page. Each assessment will display as the most current version or as a draft, if the assessment has never been published and it only exists in a Draft status. If an assessment has previous versions, those versions are nested under it and can be expanded.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning 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

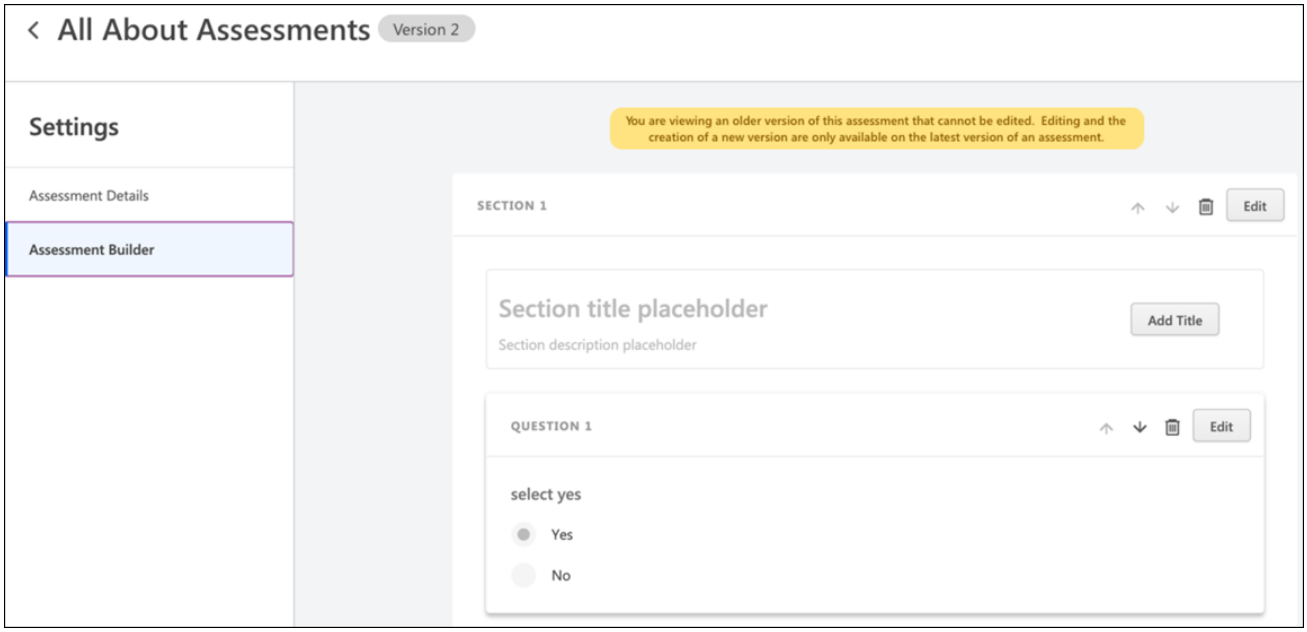


Assessments Home - Version

On the Assessments Home page, the Version column indicates the current status of each assessment. If the assessment is in a Draft status, the Version column displays the assessment's version as Draft. If the assessment has been published, the Version column displays the assessment's current version number.

If the assessment's current version number is higher than 1.0, the assessment's previous versions can be viewed by clicking the drop-down arrow to the left of the assessment's title. Expanding the assessment line item causes all previous versions to display, nested under the current version. For example, if the assessment's current version is 3.0, expanding the assessment will cause version 1.0, version 2.0, and the assessment's Draft version to display, nested under version 3.0.

- Administrators can edit the current version and the draft version of an assessment by clicking the **Edit** link to the right of the assessment version.
- Administrators can view the details of previous assessment versions by clicking the **View** link to the right of the assessment version. Previous versions are View-only and cannot be edited. Previous versions are grayed out on the page.



Learning Assessments - Create Version

A new version of a learning assessment can be created in two ways:

- Click the **Create Version** option for the current version of an assessment on the Assessments Home page.
- Click the **CREATE VERSION** button in the Assessment Builder when editing the current version of an assessment

For information about what types of changes require a new assessment version: *See Learning Assessments (Open Beta) Enhancements - Versioning.*

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

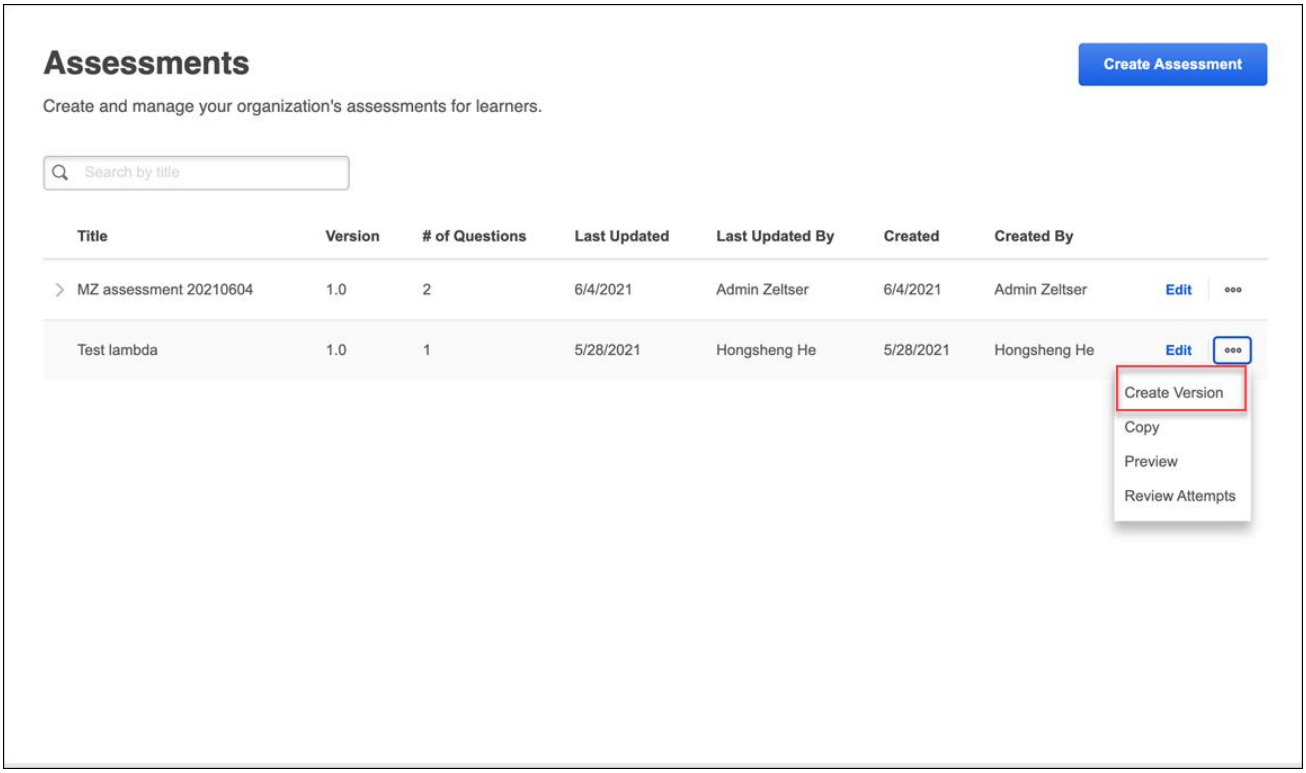
Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Learning 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

New Version from Assessments Home

To create a new version of an assessment from the Assessments Home page, click the **...** button to the right of the current version of the assessment. Select the **Create Version** option from the menu that appears.

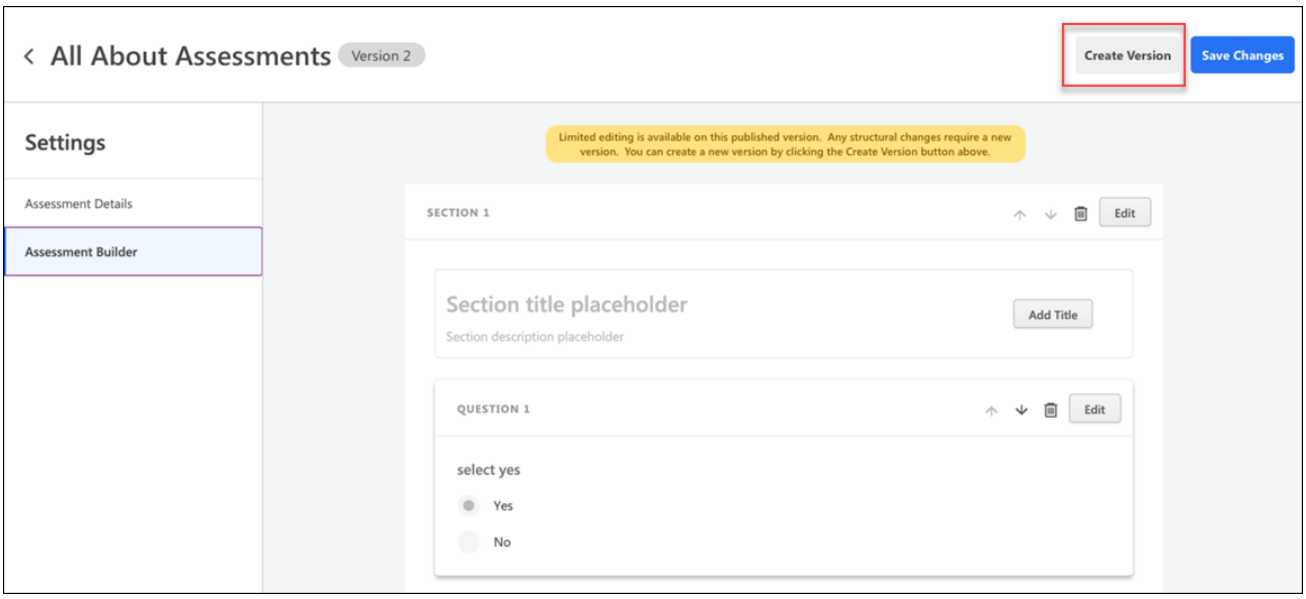
The administrator can make any textual or structural changes needed. When all the desired changes have been made, the administrator can click the **PUBLISH VERSION** button to finish creating the new version of the assessment.



New Version from Assessment Builder

When editing the current version of an assessment using the Assessment Builder, only textual changes can be made to the assessment. If the administrator would like to make structural changes to the assessment, a new version of the assessment must be created by clicking the **CREATE VERSION** button.

After any needed changes have been made, the administrator can click the **PUBLISH VERSION** button to publish the new version of the assessment.



Save

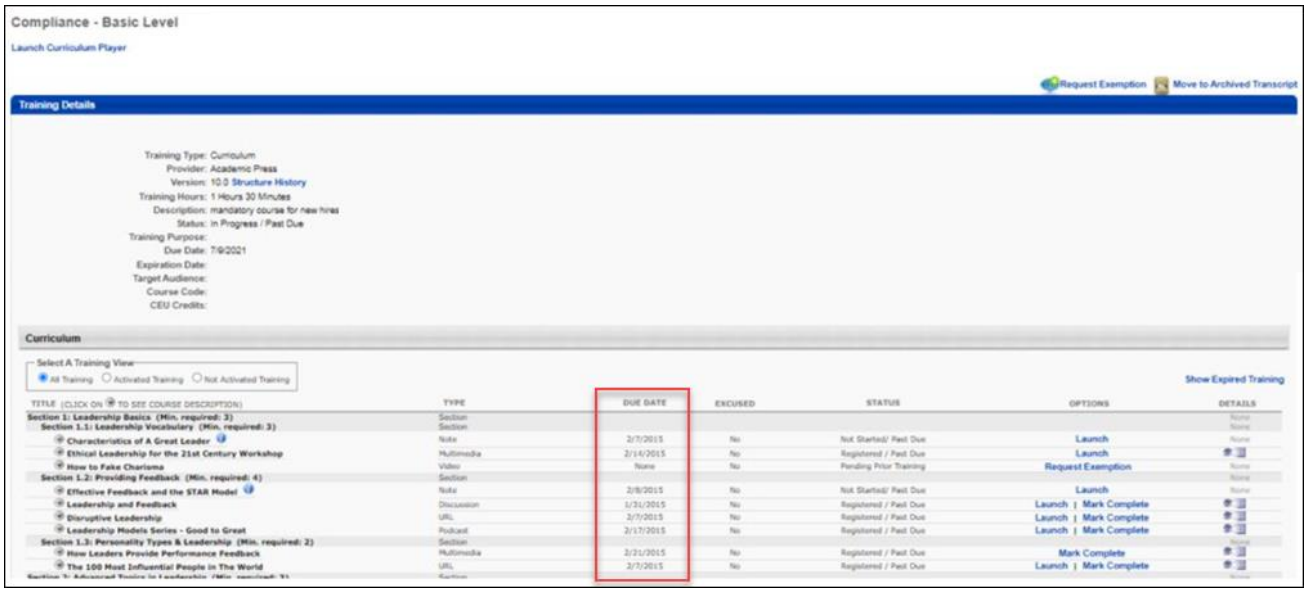
- Any changes made to a draft can be saved as a draft or published as a new version. If published, the draft will replace the current version and will trigger an audience selection.
- Administrators are prompted to choose which learners receive the newest version of an assessment.
  - Any combination of transcript statuses can be selected, including Not Started, In Progress (which includes Failed), or Completed.
  - If no statuses are selected, only new assignments will receive the new version.
  - Selection of individual users, organizational units (OUs), or groups outside of the above statuses are not supported.
- If only textual changes are made, a new version is not required. The changes made will be visible to the learners assigned to that version.

Maintain Completed Child Training Due Date During Curriculum Assignment

Prior to this enhancement, when a completed child training item was reassigned to a user via another curriculum, or the completed child training item was removed and then reassigned via the same curriculum, the completed child training due date would display a blank value. In reporting, this created the false impression that these completed child training items never had a due date or were never assigned

With this enhancement, when a completed child training item is reassigned via another curriculum or via the same curriculum, it is restored to the user's transcript with the correct due date. Administrators can view the due dates of reassigned completed child training on users' transcripts and in reporting.

Note: *The restored due date is the due date that existed at the time of time of the child training's completion. However, if the completed child training of a curriculum is removed via a dynamic learning assignment with a due date that was relevant at the time of completion, the due date is recalculated based on the due dates applicable for the child training assigned via other curricula. If the child training is removed and restored via the same curriculum, then the due date of the assignment is considered and applied accordingly.*



Implementation

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

Metadata Preservation for Content Subscriptions and Integrations

When an organization purchases a content subscription or integration, courses from the subscription or integration are automatically loaded into their portal via the Content Delivery System (CDS). These courses are added to the portal with pre-populated metadata, including the course title, description, and keywords. After a course has been loaded into a portal via the Content Delivery System, administrators can manually edit the course's metadata using the Course Catalog or Course Console. However, this capability can result in issues when content providers push metadata updates for their courses, as any metadata manually changed by an administrator will be overwritten by the automatic metadata updates from the provider.

With this enhancement, organizations can opt to have automatic metadata syncs from content providers blocked, which prevents manual metadata updates from being overwritten. Metadata update blocking is NOT turned on by default, but organizations can open a case to turn this feature on if they wish to protect their manually-updated metadata from being overwritten.

This functionality as been delayed to the May 2022 release.

Considerations

If metadata preservation is enabled in the portal, metadata updates are only blocked for the following fields:

- Title
- Description
- Keywords
- Any localizations provided for the above fields

Course metadata fields other than the fields listed above WILL be overwritten, even when metadata preservation is enabled in the portal. ***Note:*** *Subjects are never overwritten. Subjects from content subscription course updates are appended to the existing subjects in the portal.*

Metadata blocking applies to the following training types:

- Online classes
- Online content

Implementation

This feature is opt-in, meaning it is NOT turned on by default. If an organization wishes to enable metadata blocking in their portal, to prevent manually modified metadata from being overwritten when content subscriptions and integrations are synced, please open a case with Global Customer Support. This functionality will be release in a post-release patch.

Prevent Over Assignment of Versioned Curriculum

Prevent Over Assignment of Versioned Curriculum

When training is assigned to learners, the system tracks whether learners are compliant with their required training at any given time. Any additional, unintended assignment to a learner, also known as "overassignment," may prevent the learner from achieving compliance and can burden administrators with extra steps to ensure only intended users receive assignments.

This enhancement prevents the unintended overassignment of versioned materials and online courses in the following scenarios:

The material or online course was versioned, and the **Assign To** option is set to **Users Assigned by Dynamic Assignment**. Then:

- The versioned material or online course was contained within a curriculum that was assigned to the learner in the past, but the material or online course is no longer part of that curriculum, and the learner has already completed the material or online course.
- A child material or online course contained within multiple curricula is assigned to a learner via different assignment criteria and the learner completes both curricula. If the learner is removed from one of the assignment criteria and the child training is versioned, the learner receives both curricula even though they are not part of all the assignment criteria anymore.

Implementation

This functionality is automatically available in all portals using the Learning module and with the Oct '21 release, it can be activated via self-service on the Learning Features Activation Preferences page. This feature will be turned on by default with the Feb '22 release.

Permissions

The following existing permissions apply 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 - Administration

Learning Feature Activation

A preference to ensure that the transcript status of child training will be in sync with the due date displayed in the curriculum that the user is currently viewing can be enabled via the Feature Activation Preferences page. With the Feb '22 release, this updated logic is opt-in.

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

Permissions

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

Preventing Personal Identifiable Information (PII) Transfer to Content Anytime Providers

With this enhancement, any data fields containing personal identifiable information (PII) will be communicated to Content Anytime providers with masked values, to prevent personal identifiable information from being transferred to providers. This update helps to facilitate General Data Protection Regulation (GDPR) compliance when transferring personal data from EMEA to the United States.

This enhancement will result in some minor changes to the end user experience. For example, the user's first name, last name, and email address will not be displayed within training courses they interact with. Instead, the name John Doe may display as **** ****. In addition, replacing the learner's ID with a globally unique identifier (GUID) may require the learner to restart a course from the beginning if the course was already in progress on their transcript.

Considerations

- This enhancement only applies to Content Anytime content.
- This enhancement only applies to EMEA customers.
- This enhancement only applies to the following protocols:
  - SCORM 2004
  - SCORM 1.2
  - AICC
- This enhancement applies to the following:
  - SCORM Dispatch
  - URL Enhancements

Exclusions

The following are not impacted by this enhancement:

- Custom integrations (such as Skillsoft, Coursera, and LIL)
- Manually-loaded content
- xAPI and online content
- The Cornerstone Learn app

Implementation

This functionality is enabled by default for all EMEA customers. This enhancement only affects the EMEA customers who previously relied on the "Privacy Shield" framework, which is no longer valid.

Remove Self-Requested Training

Remove Self-Requested Training

Prior to this enhancement, if a learner requested a training item and it was added to their transcript, it was not possible for the learner to remove that training item from their transcript themselves. It was also not possible for managers to remove training they had assigned to their employees from their employees' transcripts. The intervention of an administrator was needed to remove the training from the user's transcript.

With this enhancement, learners can remove training items they self-requested from their transcripts using a new **Remove** option available on the Transcript page. Also with this enhancement, managers can be granted the ability to remove training they assigned to their employees from their employees' transcripts. These abilities are permission-based.

FAQ

Q: How does this functionality differ from the existing *Remove Training* permission?

A: The *Remove Training* permission is an administrator permission that is typically only assigned to administrators, while the new *Remove Training - Self Requested* permission is an end user permission. End users who are granted the *Remove Training - Self Requested* permission are able to remove self-requested training items from their own transcript without administrator intervention.

Q: What is self-requested training?

A: Self-requested training is training that the learner requested themselves. It is NOT training that was assigned to them by a manager, administrator, or via a learning assignment or other tool.

Q: Can training with a due date be removed?

A: Yes, training with a due date can be removed.

Q: Does this feature give learners access to the Removed tab of their own transcripts?

A: No, only administrators will continue to have access to the Removed tab of users' transcripts.

Q: Can users remove training from their transcript via other system locations, such as Learner Home?

A: No, users can remove training from their transcript via the Transcript page only.

Q: Can any emails be triggered by training self-removal?

A: No, there are no emails triggered when a user removes self-requested training from their own transcript.

Considerations

The following considerations apply to this functionality:

Training Type Considerations

The following training types are supported for self-removal:

- Curricula

- Events and sessions
- External content
- External training
- Libraries
- Materials
- Online classes
- Online content
- Quick courses
- Tests
- Videos

The following training types are NOT currently supported for self-removal:

- Assessments
- Certifications
- Programs and cohorts

Note: *It is NOT possible for administrators to modify which training types are eligible for self-removal.*

Training Status Considerations

Training must be in the following training statuses in order for users to remove it from their transcripts:

- All statuses within the Not Started category
- All statuses within the In Progress category

Training in the following training statuses CANNOT be removed from the transcript by an end user:

- All statuses within the Completed and Completed Equivalent category (i.e. Equivalent, Exempt, Expired, Discontinued, Not Activated, etc)

Note: *It is NOT possible for administrators to modify which training statuses are eligible for self-removal.*

For more information about which training statuses are included in each category: *See Transcript Status Groups for Reporting.*

Implementation

This functionality is enabled by default in all portals using the Learning module, but users must be assigned the relevant new permission in order to have the ability to remove self-requested training from their transcripts.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Remove Training - Self Requested	Grants learners the ability to remove training that was self-requested from their active transcript and move it to the Removed tab of their transcript. This is an end user permission. This permission can be constrained by the following criteria: ○ User's Direct Subordinates ○ Direct Reports ○ User's Self ○ Employee Relationship ○ User's Subordinates ○ User Self and Subordinates ○ User's Defined OUs	Learning

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. On the Learner Home page, this permission also allows end users to view the **Completions & Hours** field, the training sidebar, and the Continue Learning carousel. This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. ***Note:*** *For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.*	Universal Profile

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

Remove Self-Requested Training from Transcript

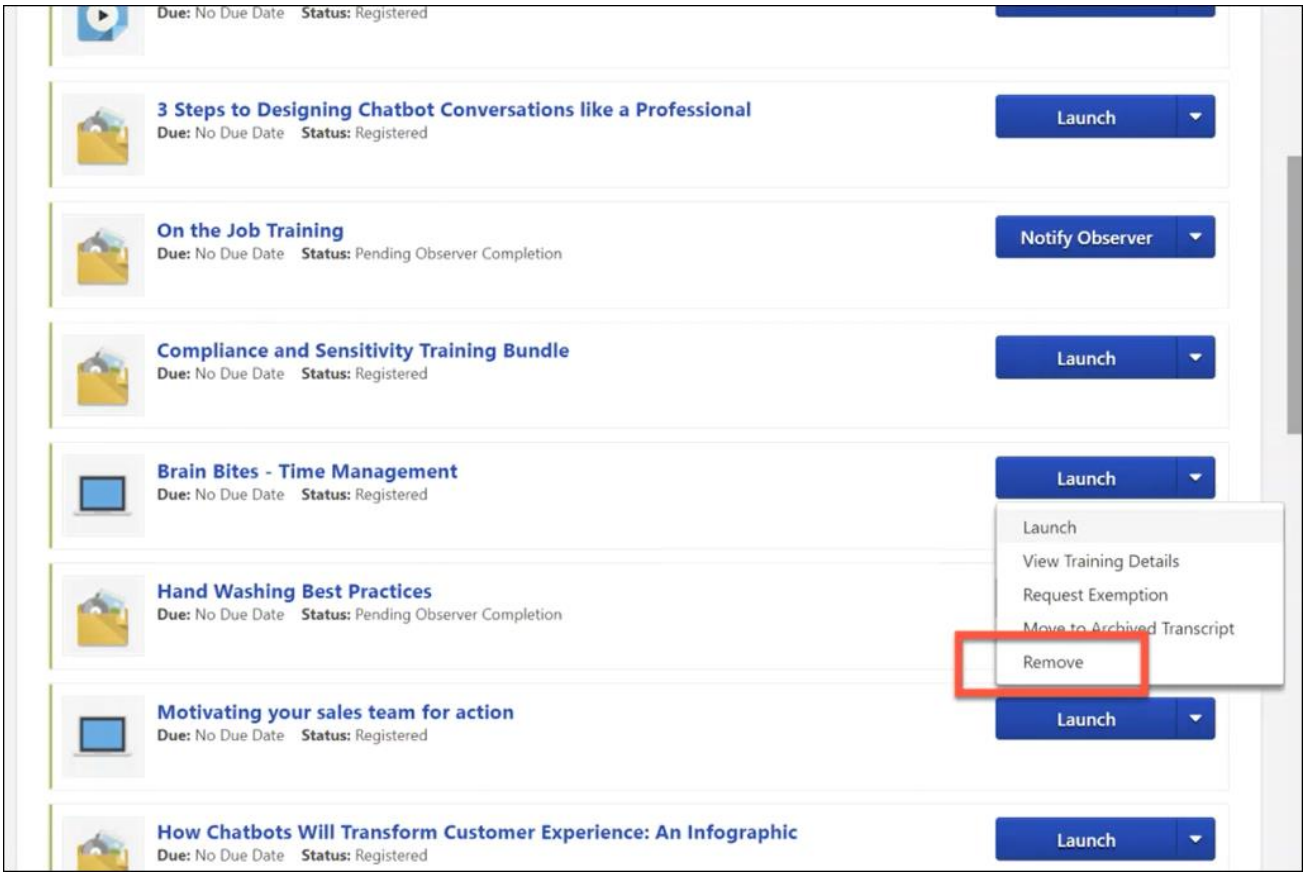
With this enhancement, learners can remove training items they self-requested from their transcripts using a new **Remove** option available on the Transcript page.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bio About - View	Enables user to view the Bio page for users within their permission constraints. This permission must be enabled to view the Transcript page within Universal Profile. If a user does not have this permission and they click a person's name or user photo within the Universal Profile, then the Bio page will not open. On the Learner Home page, this permission also allows end users to view the **Completions & Hours** field, the training sidebar, and the Continue Learning carousel. This permission can be constrained by Employee Relationship, OU, User's OU, User's Direct Reports, User Self and Subordinates, and User. ***Note:*** *For security purposes, this permission is constrained to User Self and Subordinates by default. However, the permission constraints can be modified to allow users to view the Bio About page for other users.*	Universal Profile
Remove Training - Self Requested	Grants learners the ability to remove training that was self-requested from their active transcript and move it to the Removed tab of their transcript. This is an end user permission. This permission can be constrained by the following criteria: ○ User's Direct Subordinates ○ Direct Reports ○ User's Self ○ Employee Relationship ○ User's Subordinates ○ User Self and Subordinates ○ User's Defined OUs	Learning

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



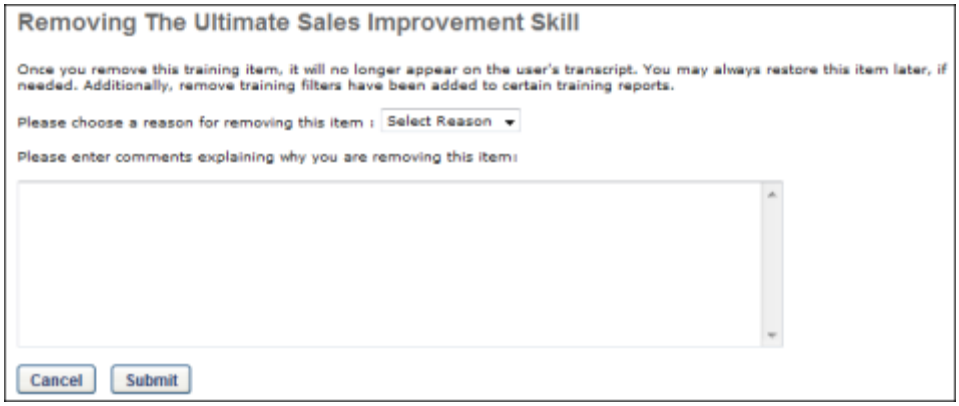
Remove

After a user has requested training and it has been added to their transcript, the user can remove that training by navigating to their transcript and selecting the Options drop-down menu to the right of the training. If the user has permission to remove self-requested training, a **Remove** link is available in the drop-down. The user can click the **Remove** link to remove the training from their transcript. This opens the Remove Training pop-up, in which the user must populate the following fields:

- **Select Reason** - Select the reason for removing the training. This is required. ***Note:*** *Reasons appear in the user's display language, when available. If the user's display language is not available, then the reason appears in the reason's default language.*

- **Comments** - In the field, enter additional comments regarding the training removal. Depending on the selected reason, this may be required.

When the user has finished populating the above fields, they can click the **SUBMIT** button, and the training item will be removed from their transcript. If the user does not wish to finalize the training removal, they can click the **CANCEL** button and return to the Transcript page, and the training will not be removed.



Training Self Removal Scenarios

The table below outlines common training request and assignment scenarios and clarifies whether it is possible for users to self-remove training in those scenarios:

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE ?
Learners	General	1. Learner self-requests training	Yes
Learners, Managers, and Administrators	General	1. Manager or administrator assigns training to the learner via direct assignment	No
Learners, Managers, and Administrators	General	1. Learner self-requests training	No

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		2. Manager or administrator assigns the same training to the learner via direct assignment	
Learners and Administrators	LAT	1. Learner self-requests training 2. Administrator assigns the same training to the learner via the Learning Assignment Tool (LAT) with the **Maintain Progress** option enabled	No
Learners and Administrators	LAT	1. Learner self-requests training 2. Administrator assigns the same training to the learner via the Learning Assignment Tool (LAT) with the	No

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		Maintain Progress option disabled	
Learners and Administrators	LAT	1. Learner self-requests training 2. Administrator assigns the same training to the learner via the Learning Assignment Tool (LAT) with the **Maintain Progress** option enabled 3. Administrator removes this training directly from the learner's transcript 4. Learner self-requests the training again	Yes
Learners and Administrators	LAT & TRT	1. Learner self-requests training 2. Administrator assigns the same	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		training to the learner via the Learning Assignment Tool (LAT) with the **Maintain Progress** option enabled 3. Administrator removes this training via the Training Removal Tool (TRT) 4. Learner self-requests the training again	
Learners and Administrators	LAT	1. Learner self-requests training 2. Administrator assigns the same training to the learner via the Learning Assignment Tool (LAT) with the **Maintain Progress** option disabled	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		3. Admin removes this training directly from the learner's transcript and selects to remove only current registration	
Learners and Administrators	LAT	1. Learner self-requests training 2. Administrator assigns the same training to the learner via the Learning Assignment Tool (LAT) with the **Maintain Progress** option disabled 3. Administrator removes this training directly from the learner's transcript and selects to remove all prior registrations 4. Learner self-requests the	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE ?
		training again	
Learners and Administrators	LAT & TRT	1. Learner self-requests training 2. Administrator assigns the same training to the learner via the Learning Assignment Tool (LAT) with the **Maintain Progress** option disabled 3. Administrator removes this training via the Training Removal Tool (TRT) 4. Learner self-requests the training again	Yes
Learners and Administrators	Versioning	1. Learner self-requests training 2. The training is versioned with the **Replace**	No (but will be supported with a future release)

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE ?
		versioning option	
Learners and Administrators	Versioning	1. Learner self-requests training 2. The training is versioned with the **Append**versioning option	No (but will be supported with a future release)
Learners and Administrators	Express Class	1. Learner self-requests training 2. Administrator completes the training via Express Class	No
Learners and Administrators	Express Class	1. Learner self-requests training 2. Administrator completes the training via Express Class 3. Administrator removes this training directly from the learner's transcript and selects to remove all prior registrations	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		4. Learner self-requests the training again	
Learners and Administrators	Express Class	1. Learner self-requests training 2. Administrator completes the training via Express Class 3. Administrator removes this training directly from the learner's transcript and selects to remove only current registration	Yes
Learners, Managers, and Administrators	General	1. Manager or administrator assigns training to the learner via direct assignment 2. Manager or administrator removes this training directly from the learner's transcript	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		3. Learner self-requests the training	
Learners, Managers, and Administrators	TRT	1. Manager or administrator assigns training to the learner via direct assignment 2. Administrator removes this training via the Training Removal Tool (TRT) 3. Learner self-requests the training	Yes
Administrators	LAT	1. Administrator assigns training to the learner via the Learning Assignment Tool (LAT)	No
Managers and Administrators	LAT	1. Administrator assigns training to the learner via the Learning Assignment Tool (LAT)	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		2. Manager or administrator removes this training directly from the learner's transcript 3. Learner self-requests the training	
Learners and Administrators	LAT & TRT	1. Administrator assigns training to the learner via the Learning Assignment Tool (LAT) 2. Administrator removes this training via the Training Removal Tool (TRT) 3. Learner self-requests the training	Yes
Administrators	Express Class	1. Administrator completes training via Express Class	No
Learners and Administrators	Express Class	1. Administrator marks training	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		incomplete via Express Class 2. Administrator removes this training directly from the learner's transcript 3. Learner self-requests the training	
Learners and Administrators	Express Class & TRT	1. Administrator marks training incomplete via Express Class 2. Administrator removes this training via the Training Removal Tool (TRT) 3. Learner self-requests the training	Yes
Learners and Administrators	LAT	1. Learner self-requests training 2. Administrator assigns a curriculum that contains the same training	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		3. Administrator realizes the curriculum was assigned to the learner in error and removes the curriculum 4. Training remains standalone on the transcript	
Learners and Administrators	Versioning	1. Learner self-requests training 2. Administrator assigns a curriculum that contains the same training 3. Administrator versions the curriculum 4. Administrator removes the curriculum and the training the learner self-requested is not removed and remains standalone	Yes

USER TYPES	SYSTEM AREA	SCENARIO	IS SELF REMOVAL POSSIBLE?
		on the transcript	
Learners and Administrators	Training Update Tool	1. Learner self-requests training 2. Administrator completes the training using the training update tool	No
Learners and Administrators	Edge	1. Learner self-requests training 2. Administrator completes the training using Edge Import	No

Reporting Fields - Learning

With this enhancement, the following new Learning field is available in Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Training ID Common Across All Versions	This field will allow the administrator to connect different versions of a training item together, helping to show which versions of the training have been distributed to which users at any time for a specific training. This is particularly useful if the training title has changed from one version to the next. This field applies to the following training types: ○ Curricula ○ Materials ○ Online courses ○ Tests ***Note:*** *If a supported training type only has one version, this field returns a blank value.*	Text

Also with this enhancement, the following existing Learning field has been updated:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Transcript Delivery Method	This field displays the method by which a training item was added to the user's transcript. Possible values include: ○ External Progress (this is a new value added with the Oct 2021 release) ○ Self-Requested System Assignment (LAT) ○ Direct Assignment ○ Express Class ○ External Progress ○ Assignment (This category is representative of historical data records prior to the Feb '19 release which are not reliable and therefore have been contained separately to preserve data quality. Over time, this category will be deprecated. ○ Other - The Other status appears for all other miscellaneous transcript delivery cases, including: Assignment via Inventory Added by Training Plan Historical Data Loads (except in certain cases described in above values) Data Load Wizard	Text

Implementation

This functionality is enabled by default in all portals using the Learning module and Reporting 2.0

Click here for the Reporting 2.0 Adoption Kit!

Sanitize HTML in Curriculum Fields

To provide a more secure experience, Cornerstone has made changes to several curricula administration fields to prevent XSS (cross-site scripting) security vulnerabilities. These updates include the following:

- HTML text will be encoded in fields that do not support HTML
- Fields will be validated for potentially problematic JavaScript

The following curricula administration field is only impacted by the HTML encoding update:

- Curriculum title

The following curricula administration fields are impacted by both the HTML encoding update AND the field validation update:

- Section title
- Section instructions
- Note title
- Note instructions

Considerations

For the additional fields that are checked for problematic inputs of HTML and Javascript:

- In affected fields that do not allow HTML, the field will display as HTML code and not as it would be rendered by a browser if tags are entered. As a result, HTML will not render in Global Search, Learning Search, Transcript, or Curriculum Player.
- In fields that do allow HTML, the field is validated for Javascript, and the administrator cannot move on in the curriculum creation process if problematic code is found.
- Impact to existing curricula - If a curriculum already has JavaScript in one of the fields that is now validated, this will continue to exist in that field until an administrator edits that curriculum and re-saves. At the time the curriculum is saved, the field will display a validation message and prevent the saving of the curriculum until the problematic JavaScript is removed.

Implementation

This functionality is turned on by default for all portals using the Learning module. ***Note:*** *Customers who have the backend setting enabled to bypass Cross Site Scripting (XSS) security measures are unaffected by this enhancement.*

Permissions

The following existing permission applies 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

Save Email Settings in Learning Assignment Drafts

Save Email Settings in Learning Assignment Drafts

Prior to this enhancement, if an administrator saved a learning assignment as a draft, any email settings configured for the draft assignment would NOT be saved to the draft. When the administrator edited the draft in the future, the email settings would need to be reconfigured before submitting the assignment.

With this enhancement, when an administrator saves a learning assignment as a draft, any email settings configured for the draft assignment are saved. When the administrator edits the draft in the future, their email configurations will display in the same state they were saved in. The administrator can then continue editing the assignment's settings if desired and submit the assignment.

Click here for the Learning Assignment Tool Starter Guide!

Implementation

This functionality is automatically available in all portals using the Learning module. No additional steps are necessary to enable this feature.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Email Settings - Manage	Grants ability to manage email settings when creating a Learning Assignment. This includes the ability to select all four email settings, set up Custom Emails (create new emails and set existing emails as active/inactive), set up Ad-Hoc Emails, and enable/disable Assign Training and Register Training email triggers when Training Specific Emails is selected. This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. If this permission is constrained, then only users within the constraints will receive the emails. This is an administrator permission.	Learning - Administratio n
Assignment Tool - Email Settings - View	Grants ability to view and select email settings when creating a Learning Assignment. This includes the ability to select Training Specific Emails, Custom Emails, or No Emails but does not grant ability to	Learning - Administratio n

	manage the actual Email Settings (cannot configure Custom Emails or Ad-Hoc Email and cannot enable/disable Assign Training and Register Training email triggers when Training Specific Emails is selected). This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. If this permission is constrained, then only users within the constraints will receive the emails. This is an administrator permission.	
Assignment Tool - Standard and Dynamic	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administratio n
Assignment Tool - Standard	Grants ability to create Standard (one-time) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administratio n

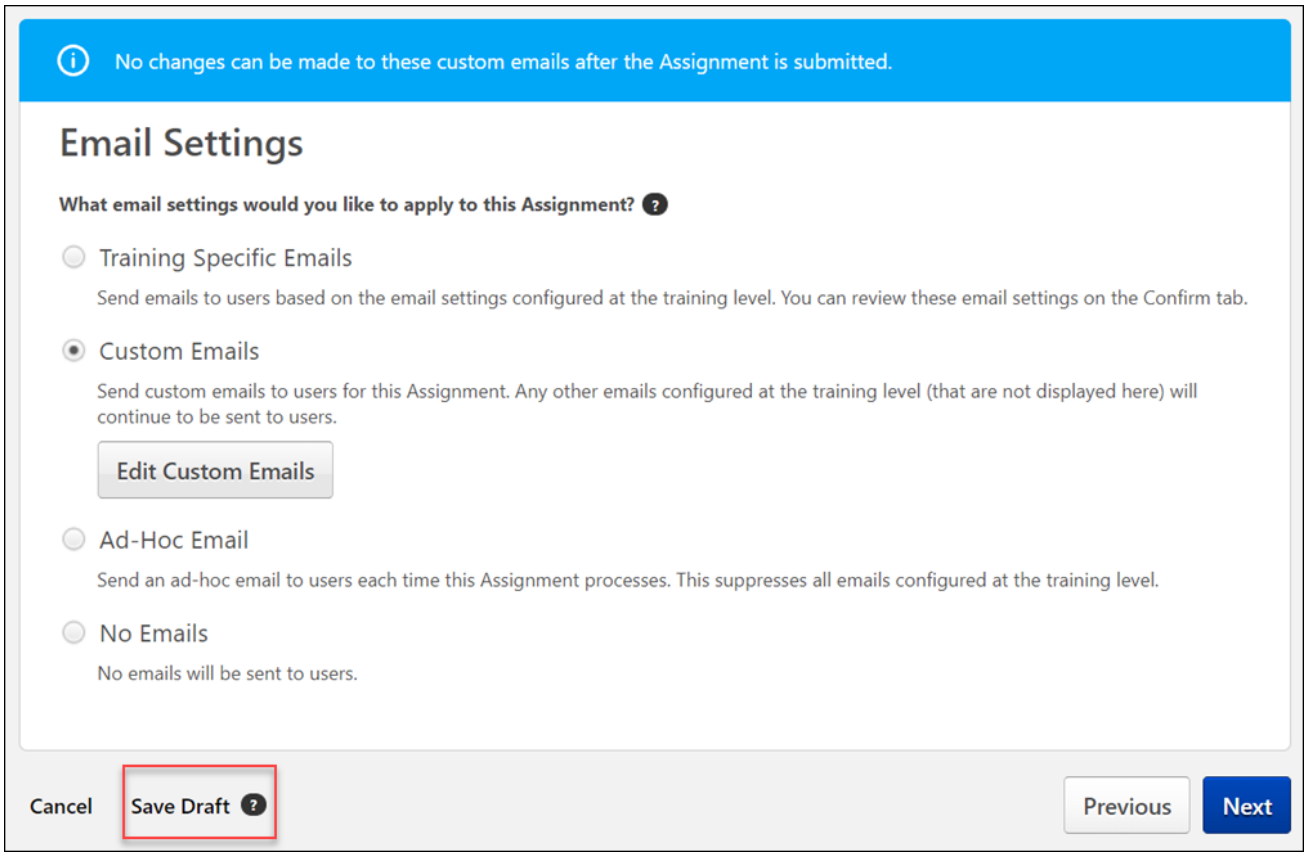
Save Email Settings in Learning Assignment Drafts - Create Draft

Administrators can save a draft of a learning assignment they began configuring but did not submit. The draft can then be accessed later for editing and submission. With this enhancement, email configurations saved with the draft persist when the draft is accessed at a later time.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Assignment Tool - Email Settings - Manage	Grants ability to manage email settings when creating a Learning Assignment. This includes the ability to select all four email settings, set up Custom Emails (create new emails and set existing emails as active/inactive), set up Ad-Hoc Emails, and enable/disable Assign Training and Register Training email triggers when Training Specific Emails is selected. This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. If this permission is constrained, then only users within the constraints will receive the emails. This is an administrator permission.	Learning - Administratio n
Assignment Tool - Email Settings - View	Grants ability to view and select email settings when creating a Learning Assignment. This includes the ability to select Training Specific Emails, Custom Emails, or No Emails but does not grant ability to manage the actual Email Settings (cannot configure Custom Emails or Ad-Hoc Email and cannot enable/disable Assign Training and Register Training email triggers when Training Specific Emails is selected). This permission is dependent on the Assignment Tool - Standard, Assignment Tool - Standard and Dynamic, and Assignment Tool - Standard and Dynamic - Recurrence permissions. This permission can be constrained by OU, User, User Self and Subordinates, and User's OU. If this permission is constrained, then only users within the	Learning - Administratio n

	constraints will receive the emails. This is an administrator permission.	
Assignment Tool - Standard and Dynamic	Grants ability to create Standard (one-time) and Dynamic (continuous) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration
Assignment Tool - Standard	Grants ability to create Standard (one-time) Learning Assignments to directly assign training to users. This permission can be constrained by OU, Provider, Training Item, Training Type, User, User Self and Subordinates, and User's OU. If this permission is constrained by Location, Provider, Training Type, or Training Item, then they can only assign training within the constraints. If this permission is constrained by OU, User, User Self and Subordinates, or User's OU, then they can only assign to and view assignments created by users within the constraints. This is an administrator permission.	Learning - Administration



Create and Save Draft Learning Assignment

To save a draft of an assignment you have begun to create, click the **SAVE DRAFT** button at the bottom of any page in the create assignment workflow. The draft will be saved, and you will be redirected to the Manage Learning Assignments page. Your draft assignment can then be accessed and completed later.

Any email settings you have configured for the learning assignment will be saved in the draft, and will be available when you resume the draft in the future.

To access a draft learning assignment from the Manage Learning Assignments page, either click the title of the draft learning assignment or click the **Options** drop-down arrow to the right of the draft and click the **Resume Draft** link.

Standardize Curriculum Completion Date Logic Auto-Enabled with the October '21 Release

With this enhancement, the logic for the designation of curriculum completion dates has been standardized across various training completion scenarios in the Learning Management System (LMS). The general rule is that the date of curriculum completion will be the date the user completed the last child training item within the curriculum.

With the October '21 release, all portals will have the standardized curriculum completion date logic automatically enabled.

Additional considerations apply to certain training types and specific system scenarios:

Last Completed Child Training Item is an Event

Prior to this enhancement, if the last child training item completed in the curriculum was an event, the curriculum completion date would always reflect the date the roster was submitted, ignoring the **Default Session Completion Date** option set in ILT Preferences.

With this enhancement, if an event is the last child training item to be completed in a curriculum and it triggers a completion for the parent curriculum, the curriculum completion date will be the same as the event's completion date. The event completion date is determined by the session completion date, which observes the **Default Session Completion Date** setting defined in ILT Preferences.

Express Class, Training Update Tool, On the Job Training (OJT) Material, Edge Import

Prior to this enhancement, if the last child training item in a curriculum was completed through a completion tool, such as Express Class, the Training Update Tool, On the Job Training, or Edge Import, the curriculum completion date reflected the date the job was executed and not the completion date that was specified.

With this enhancement, when the completion of the last child training item in a curriculum is triggered by one of these tools, the curriculum completion date will reflect the date of the most recently completed child training item within the curriculum.

Considerations for Completion Tool Completions:

- **Q:** What if the curriculum was already in a Completed status at the time the Express Class was executed?
  - **A:** If all of the curriculum's minimum completion requirements have been met, the completion date of the curriculum will not be altered by a child training being marked complete.
- **Q:** What happens if the tool defines the completion date of a child training as a date prior to the curriculum's assignment date?
  - **A:** The child training will be marked complete using the date specified. The curriculum completion date will reflect the latest completion date amongst other child training items required to complete the curriculum.

- **Q:** What happens if all child training items have completion dates prior to the curriculum assignment date?
  - **A:** The curriculum completion date will still be the date of the most recently completed child training item within the curriculum, even if the completion date is prior to the assignment date.

Training Equivalencies

Prior to this enhancement, if the last child training item within a curriculum was completed via a retroactive training equivalency, the curriculum completion date would be the date the training equivalency was configured in the Course Catalog, instead of the date of the most recently completed child training item within the curriculum.

With this enhancement, when the last training item to trigger completion of a parent curriculum is marked complete through a retroactive training equivalency, the curriculum completion date will reflect the date of the most recently completed child training item within the curriculum. Training Equivalencies that are not applied retroactively are not impacted.

Child Training Versioned with Versions Equivalent Option

Prior to this enhancement, when a child training was versioned using the **Versions Equivalent** option and a new curriculum version was triggered and assigned to a user, the new curriculum version's completion date would be the same as the versioning date.

With this enhancement, when a child training item is versioned using the **Versions Equivalent** option and a new curriculum version is triggered and assigned to a user, the new curriculum version's completion date will be the date of the most recently completed child training item within the curriculum.

Considerations

The following considerations apply to this functionality:

- This enhancement is not retroactive. Once the standardized curriculum completion date logic is activated, the logic will only be applied to future curriculum completions.
- If a curriculum is marked complete by a training equivalency or a language equivalency, the curriculum completion date will always match its equivalent training completion date. Child training completion dates are not considered in this scenario.
- If all the child training items in a curriculum are already completed, and the curriculum is assigned via the Learning Assignment Tool **without** the **Assign New Occurrence** option enabled, the curriculum completion date will be the date of the most recently completed child training item within the curriculum.

Implementation

With the October '21 release, all portals will have the standardized curriculum completion date logic automatically enabled.

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 - Administration

Training Removal Tool Enhancements

Training Removal Tool Enhancements - Overview

With the Oct '21 release, the following enhancements have been made to the Training Removal Tool:

- Sessions can now be removed alongside their parent instructor-led training events
- Users can be added to a training removal job via CSV upload
- Previously-run training removal jobs are now grouped by job rather than by training
- More transcript statuses are now available to select for a training removal job

Implementation

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
CSV Bulk Training Removal - Manage	Grants administrators access to the **Remove by CSV Upload** option and workflow in the Training Removal Tool, which allows the administrator to add users to a training removal job via a CSV file. This permission cannot be constrained.	Learning - Administration

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.	Learning - Administration

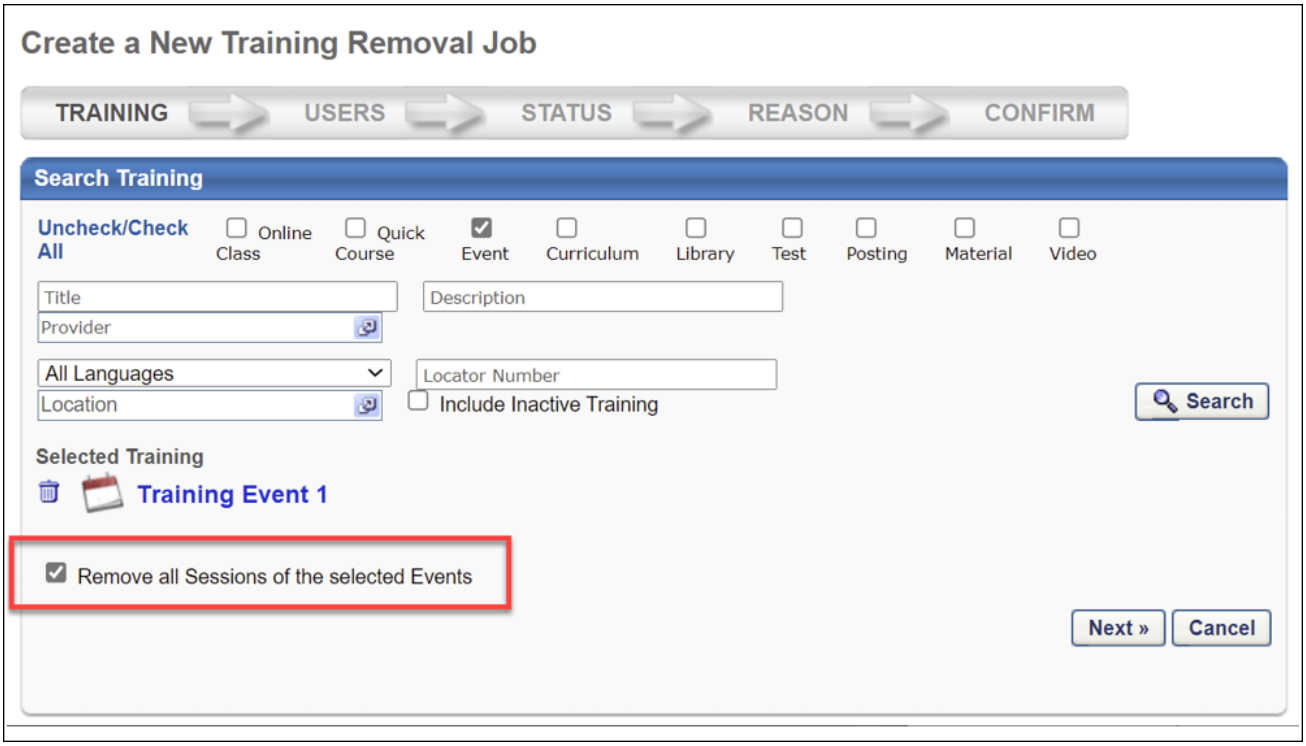
Training Removal Tool - Remove Sessions

With this enhancement, instructor-led training (ILT) sessions can be removed alongside their parent events using the Training Removal Tool.

To create a new training removal job, go to ADMIN > TOOLS > LEARNING > TRAINING TOOLS > TRAINING REMOVAL TOOL. Then, click the **Create New Training Removal Job** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.	Learning - Administration



Remove All Sessions of the Selected Events

On the Training step of the training removal job creation process, administrators can opt to remove the child sessions of any events selected for the job. Select the **Remove All Sessions of the Selected Events** option to ensure that child sessions of any selected events are also removed from users' transcripts when the removal job processes. ***Note:*** *All child sessions of selected events will be removed from users' transcripts, even if the sessions are in an Active status on the user's transcript.*

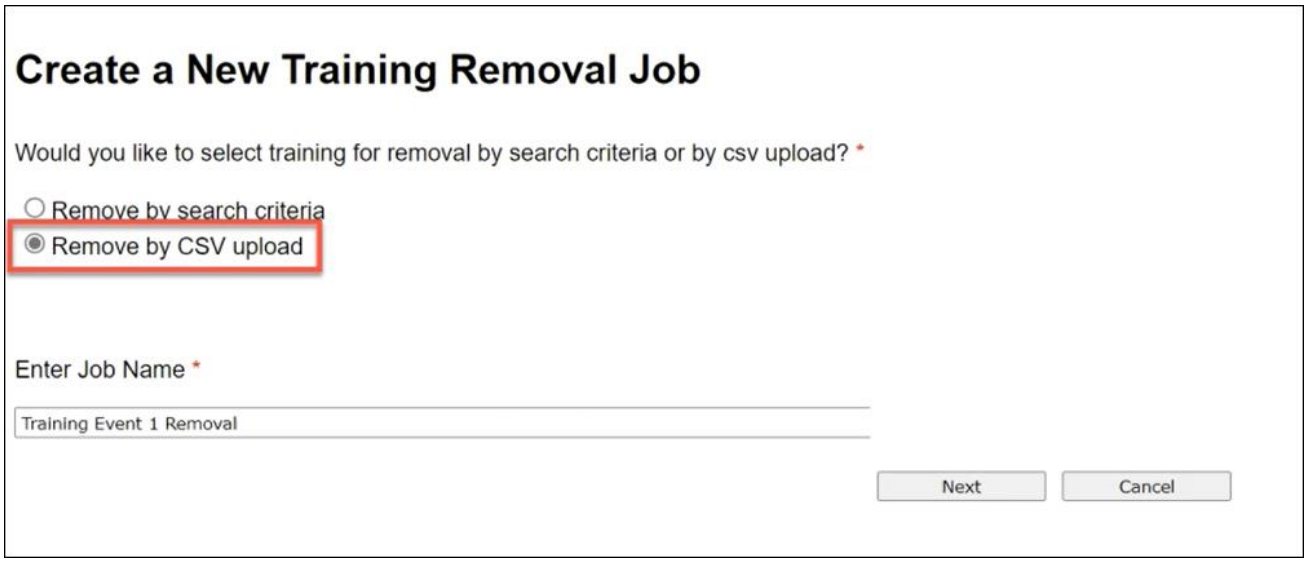
Training Removal Tool - CSV Upload and Job Name

With this enhancement, a new step has been added to the Training Removal Tool creation process. This new step is now the first step in the process, and provides administrators with a new option to add users to a training removal job by uploading a CSV file. Using the **Remove by CSV Upload** option triggers an additional part of the training removal job creation workflow. ***Note:*** *This new step is only available to the administrator if they have the new permission for CSV bulk training removal.*

To create a new training removal job, go to ADMIN > TOOLS > LEARNING > TRAINING TOOLS > TRAINING REMOVAL TOOL. Then, click the **Create New Training Removal Job** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
CSV Bulk Training Removal - Manage	Grants administrators access to the **Remove by CSV Upload** option and workflow in the Training Removal Tool, which allows the administrator to add users to a training removal job via a CSV file. This permission cannot be constrained.	Learning - Administration
Bulk Training Removal - Manage	Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.	Learning - Administration



Add Users to Training Removal Job

The first step of creating a training removal job includes selecting how users will be added to the job. Users can be added to the training removal job in the following ways:

- **Remove by Search Criteria** - Select this option to add users to the training removal job by choosing organizational unit criteria.
- **Remove by CSV Upload** - Select this option to add users to the job via an uploaded CSV file. Up to 200,000 users can be added to a training removal job using this method. The *CSV Bulk Training Removal - Manage* permission is needed to access this option.

After selecting how users will be added to the job, enter a name for the job in the **Job Name** field, then click the **NEXT** button. ***Note:*** *The name entered in the* **Job Name** *field is used to sort removal jobs on the Training Removal Tool main page.*

Training Removal Tool - Grouping

On the main Training Removal Tool page, previously-run training removal jobs are now grouped by job, rather than by the training contained within the removal job. Administrators are now able to name training removal jobs, and removal jobs are grouped by name on the Training Removal Tool page, with the training contained within the job details page. This more intuitive grouping protocol allows administrators to quickly find any previously-run training removal jobs they are looking for.

To access the Training Removal Tool page, go to ADMIN > TOOLS > LEARNING > TRAINING TOOLS > TRAINING REMOVAL TOOL.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.	Learning - Administration

Removal Job 1	9/10/2021 7:01 AM	9/10/2021 7:02 AM	Admin, Cornerstone	Processed	
Removal Job 2	9/10/2021 3:43 AM	9/10/2021 5:48 AM	Nair, Girish	Processed	
Removal Job 3	9/10/2021 2:58 AM	9/10/2021 5:28 AM	Nair, Girish	Processed	
Multiple Training Removal	9/7/2021 12:22 AM	9/7/2021 12:45 AM	Ingle, Rahul	Processed	
Removal Job 4	9/6/2021 1:53 AM	9/6/2021 1:54 AM	Nair, Girish	Processed	
Removal Job 5	9/5/2021 8:51 PM	9/5/2021 8:53 PM	Deuskar, Mugdha	Processed	

Job Name

In the Results table of the Training Removal Tool page, previously-run training removal jobs appear in the table grouped by the job names that administrators configured during the removal job creation process. Administrators can click the View Details icon of a previously-run training removal job to view the training items included in the removal job. Each job displays with the following information:

- **Job Name**
- **Create Date**
- **Process Date**
- **Created By**
- **Status**
- **View Details** - The administrator can click the View Details icon to view the details of the removed training.

If multiple training items were removed in a single job, a  icon appears to the left of the job title.

Training Removal Tool - Statuses

With this enhancement, more statuses have been added to the list of statuses that can be selected for a training removal job.

To create a new training removal job, go to ADMIN > TOOLS > LEARNING > TRAINING TOOLS > TRAINING REMOVAL TOOL. Then, click the **Create New Training Removal Job** link.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bulk Training Removal - Manage	Grants ability to bulk remove training from users' transcripts. This permission can be constrained by OU and User's OU. Creator constraints also apply. This is an administrator permission.	Learning - Administration

Confirm Removal by Status

The administrator can select the training statuses that should be included in the job, and unselect any training statuses that should not be included in the job. All of the following statuses are eligible to be selected for training removal jobs via the Status step of the training removal job creation process:

- Pending Approval
- Denied
- Approved
- Registration Pending
- Registered (Also includes Not Available)
- In Progress
- Completed, Completed Equivalent, Exempt
- Exception Requested
- Expired
- Cancelled

- Waitlisted
- Withdrawn
- Discontinued
- Incomplete
- Pending Completion Approval
- Failed
- Pending Evaluation
- Pending Prerequisite
- Waitlist Expired
- Not Started
- No Show
- Pending Acknowledgment
- Pending Prior Training
- Pending Grade
- Pending Post-Work
- Pending Pre-Work
- Completion Approval Denied
- Pending Payment
- Payment Denied
- Pending Completion Signature
- Payment Refunded
- Pending SF-182 Form Approval
- SF-182 Form Denied
- Not Available
- Subscription Expired
- Pending Observer Completion

Performance

Performance Reviews

Performance Reviews – Co-Planner Notification Enhancements

Prior to this enhancement, review co-planners assigned by administrators did not receive email notifications for tasks assigned to them. Additionally, it was difficult for co-planners without access to email to see the difference between their regular review tasks and their co-planner tasks.

With this enhancement, review co-planners assigned by an administrator will now receive an email notification when a task is assigned to them. For co-planners without access to email, tasks will now display "Co-planner" at the end of task name for easy identification.

Implementation

This functionality is automatically enabled for all organizations using Performance.

Performance Reviews – Review Comments Character Limit Increased

With this enhancement, the character limit for the **Comments** field in a performance review is increased from 10,000 to 30,000.00.

Implementation

This functionality is automatically enabled for all organizations using Performance.

Performance Reviews – Task Search Enhancements

Prior to this enhancement, it was difficult to locate specific tasks in the multi-page task list on the Performance Review Summary page.

With this enhancement, the **Show completed and expired tasks** check-box is replaced with the following filters:

- Not Started
- In Progress
- Completed
- Incomplete
- Expired

By default, all of these filters are selected, except Completed and Expired.

Additionally, a **Last Modified Date** column is added to the Performance Review Summary list table. This column is sorted by last modified date in descending order.

How Does This Enhancement Benefit My Organization?

Users can use filters to access specific tasks, and easily find their last modified task at the top of the summary list, making the search process more efficient.

Implementation

This functionality is automatically enabled for all organizations using Performance.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Launch Off-Cycle Performance Review Task	Enables a user to launch an off-cycle performance review task. Having this permission does not guarantee that the user can launch an off-cycle review, only that they will have access to the Launch Performance Review page. A task must still be configured properly for the user to successfully launch an off-cycle review task. This permission works only if user has been designated to launch at least one currently active off-cycle performance review task. This permission can be constrained by OU, User's Subordinates, and Employee Relationship. This is an end user permission.	Performance
View Performance Reviews	Grants ability to view the Performance Reviews page, which displays a user's own past performance	Performance

	reviews as well as performance review task steps they've been assigned to complete. This also grants ability to view the Batch Rating page. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an end user permission.	

Observation Checklists

Observation Checklist Date Fields Displayed in User's Time Zone

Prior to this enhancement, when users viewed Observation Checklists, observation dates were displayed in multiple time zones on the same checklist, which led to confusion.

With this enhancement, the following Observation Checklists date fields are displayed in the time zone of the logged-in user when viewing these dates in a portal's UI:

- Checklist Assignment Date
- Checklist Completion Date
- Checklist Validation Date

This enhancement is no longer available in production environments.

How Does This Enhancement Benefit My Organization?

These Observation Checklist date fields in the application UI display in the time zone of the logged-in user.

Implementation

This functionality is automatically enabled for all organizations using Observation Checklists.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Observation Checklist Admin - Manage	Grants access to create and edit Observation Checklists, as well as view progress of users assigned to a given checklist and/or remove users from a checklist. This permission can be constrained by OU and User's OU. This is an administrator permission.	Performance - Administration
Observation Checklist Admin - View	Grants access to view observation checklists. This permission also enables user to see progress of all users assigned to a given checklist. This is an administrator permission.	Performance - Administration
Launch Ad Hoc Observation Checklist	Enables a user to launch an ad hoc observation checklist. Having this permission does not guarantee that the user can launch an ad hoc observation checklist, only that they will have access to the	Performance

	Launch Observation Checklist page. There must be at least one ad hoc checklist for which the user is defined as a verifier. This permission cannot be constrained. This is an end user permission.	
Observation Checklist - Verifier	Enables user to serve as the verifier for the observation checklist of another user. This permission should be included in the dynamic security role "Checklist Verifier." The role, when active, is dynamically assigned to any user who is designated as a verifier for one or more checklists. This permission can be constrained by OU and User's OU. This is an end user permission.	Performance

Reporting Fields – Observation Checklists

Prior to this enhancement, when users ran reports using Observation Checklist date fields, the results displayed in different time zones, causing confusion about when an observation actually took place.

With this enhancement, the following Observation Checklist date fields display in the time zone of the person running the report:

Reporting 2.0 and Custom Reports

- Checklist Assignment Date
- Checklist Completion Date
- Checklist Validation Date

Standard Reports

- Checklist Assignment Date
- Checklist Completion Date

How Does This Enhancement Benefit My Organization?

All Observation Checklist date fields are displayed in the time zone of the person running the report.

Implementation

This functionality is automatically enabled for all organizations using Performance.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Observation Checklist Report	Grants access to the Observation Checklist report, which enables administrators to report on Observation Checklist data. This permission can be constrained by User Self and Subordinates, OU, User's OU, and User.	Reports - Performance

Recruiting

CV-Library Apply Integration

Note: *This feature was first announced in the 24 September 2021 patch release.*

CV-Library has integrated with Cornerstone to provide customers with applicant details directly in their Cornerstone Recruiting system, ensuring recruiters never miss a prospective candidate. CV-Library's ATS Apply automatically completes application forms and sends recruiters important candidate information, such as their curriculum vitae, directly from the candidate's CV-Library account, which will be recorded against the job in Cornerstone and source-tracked as coming from CV-Library.

Implementation

The integration was made available to self-enable on 27 September 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 in Edge. *See Edge Integration - Configure.*

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

Email on Manage Candidates (Early Adopter)

Note: *This feature was first announced in the 24 September 2021 patch release.*

The Email on Manage Candidates feature is now available in Production and Pilot environments. This feature was first announced in the July '21 release. For more information about this feature, see the following:

- **Activate Email on Manage Candidates**
- **Manage Candidates - Send Email**
- **Manage Candidates - View Candidate Messages**

Implementation

This enhancement is in the Early Adopter phase and must be self-enabled in Feature Activation Preferences. *See Enable Email on Manage Candidates.*

Permissions

The following existing permissions apply to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Recruiting Feature Activation Preferences - Manage	Grants ability to access and manage Feature Activation Preferences in Recruiting. This permission cannot be constrained. This is an administrator permission.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the*	Recruiting

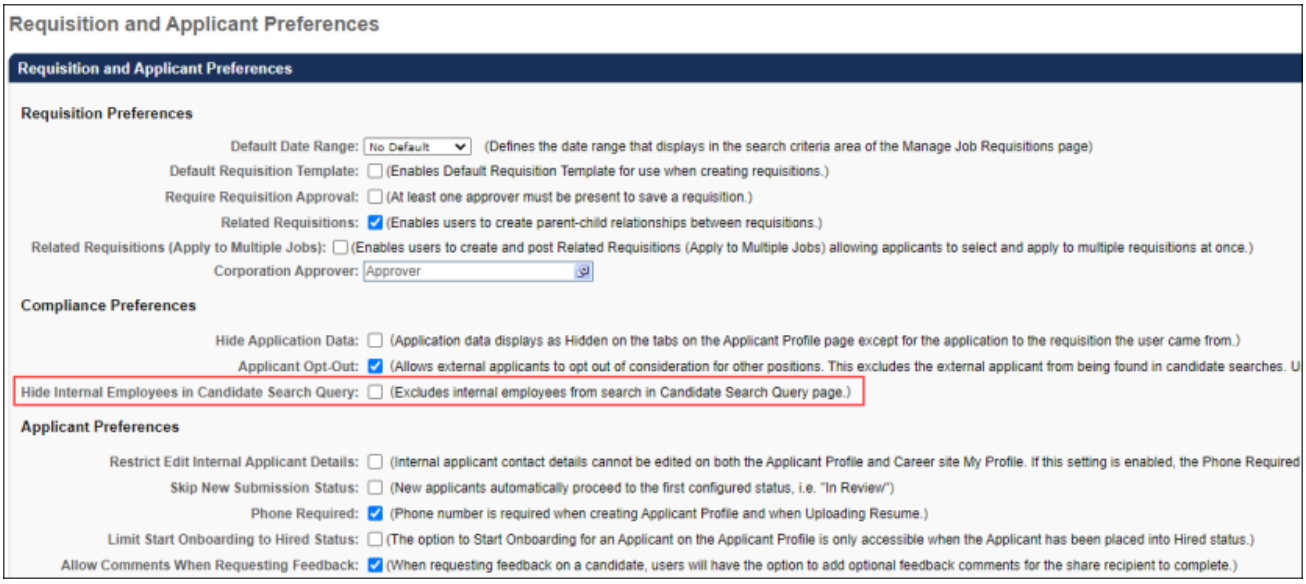
	user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	

Hide Internal Employees in Candidate Search

Prior to this enhancement, internal employees displayed in Candidate Search Query and could not be hidden. While the search could be filtered by user type so that only external candidates displayed in the results, a setting was not available to hide the **Internal Employees** option in the filter.

With this enhancement, a **Hide Internal Employees in Candidate Search Query** option is added to the Compliance Preferences section in Requisition and Applicant Preferences. This option is unchecked by default. When checked, internal employees are excluded from the search in Candidate Search Query and the **Internal Employees** option is hidden in the **User Types** filter.

Note: *Candidates with any application in a Hired status will continue to be searchable in Candidate Search Query until they become an internal employee on their start date.*



Implementation

Upon implementation, this functionality is available for all portals using Recruiting.

Permissions

The following existing permission applies to this enhancement:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Requisition Preferences - Manage	Grants ability to access and manage Requisition and Applicant Preferences. This permission cannot be constrained.	Recruiting Administration

	Note: *Users with the* Requisition: Manage *permission will not be affected by* ***Field Level Access settings****.*	