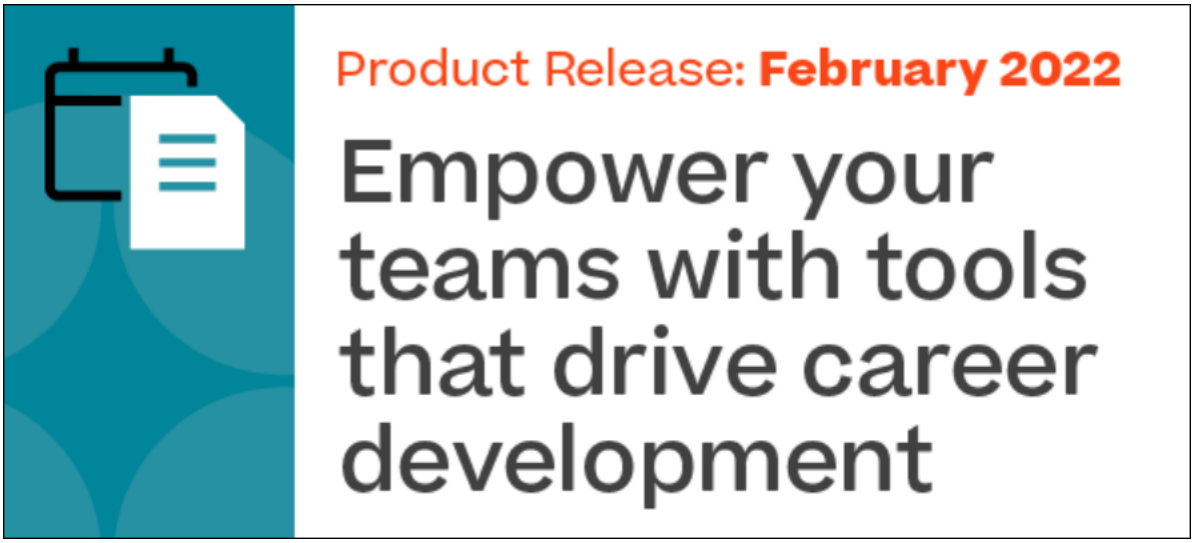


Cornerstone February 2022 Release Notes

Table of Contents

Release Notes for February 2022

What's New for February '22

The following release resources are available within Online Help:

- **Printable Release Notes** - This topic provides a printable version of all release notes content. *See Printable Release Notes.*
- **New and Enhanced Permissions** - This topic provides a list of all permissions that are newly added or modified with this release. *See* **New and Enhanced Permissions for February '22 Release** on page 20 *for additional information.*
- **New Reporting Fields** - This topic provides a list of all reporting fields that are newly added with this release. *See* **Master List of New Report Fields for February '22 Release** on page 27 *for additional information.*
- **Release Notes Updates** - This topic provides a complete list of all changes that have been made to the release notes. *See* **Release Notes Updates for February '22 Release** on page 28 *for additional information.*
- **Past Releases** - This topic contains links to past release overviews. *See Past Release Notes.*

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

The following new features and enhancements are available for the February '22 release:

Content Anytime Features

FEATURE NAME	DESCRIPTION
Content Anytime - Q1 Updates	Refreshes to Content Anytime and a la carte subscriptions occur every month! New titles are added to libraries monthly and removals occur quarterly. Content Anytime subscribers automatically receive their subscription refreshes. Target dates for Q1 refreshes are listed below. Please refer to the 2022 **Content Refresh Calendar** for the timing of refreshes for all of 2022. ○ January 14 - January 21: Additions Only ○ February 11 - February 18: Additions Only ○ March 4 - March 11: Removals & Additions

Core/General Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Bulk API - Support Learning Loads	Yes, when using Bulk API	With this enhancement, the Bulk API now supports learning data loads.
Custom Reports – Limit How Long Snapshots Are Stored	Yes	With this release, to save storage space and ensure steady performance, Custom Report snapshots are stored for a maximum of one year.
Deprecation of Custom Reports to Begin in August 2022		The deprecation of Custom Reports is targeted to start with phase 1 occurring in the August ’22 Release. This target date gives customers time to prepare and to complete their migration to Reporting 2.0. In the meantime, Cornerstone will also continue to further enhance Reporting 2.0.
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. As of the October ’21 Release, defects for these report formats that are not P1 are not being fixed. Customers exporting or downloading their Reporting 2.0 reports in Word or XML formats are encouraged to switch to any of the other available formats in advance of the May ‘22 deprecation.
Deprecation of Learning Loads for Data Load Wizard (DLW) with the May '22 Release		***Important:*** *The deprecation of Learning Loads for Data Load Wizard has been delayed until the May '22 Release. Please review the Edge Import Learning Loads migration guide and continue to plan your organization's migration.* Ability to perform learning data loads using Data Load Wizard will be deprecated with an end-of-life in the May ‘22 Release. Defects will no longer be fixed, and Data Load Wizard Learning Loads will no longer be visible or accessible in customer portals. Data Load Wizard is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Deprecation of 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 Data Load Wizard Users and OU loads and feeds will stop at this time.**
Edge Import - Capabilities Load Enhancement (Library Load)	Yes, when using Edge Import	With this release, administrators can now link custom skills to skills in the Cornerstone Skills Graph. When importing capabilities using the Library load, Edge Import automatically links imported custom skills to equivalent Skills Graph skills based on title and synonym matching. This enhancement is related to Link Custom Skills to the Cornerstone Skills Graph, which is also new with the February '22 Release.
Edge Import - Employee & OU Loads Enhancements	Yes, when using Edge Import	With this enhancement, additional functionality is now available when importing Employee and Organizational Unit (OU) data using Edge Import.
Edge Import - Learning Load Enhancement (External Training Load)	Yes, when using Edge Import	With this enhancement, the External Training load in Edge Import is enhanced to support common external training update use cases.
Edge Import - Learning Load Enhancement (Online Course Transcript Load)	Yes, when using Edge Import	With this enhancement, transcript statuses for online courses can be updated in the following ways: ○ From Approved to Failed ○ From Failed to Failed, Completed ○ From Registered to Failed
Edge Import - Learning Load Enhancement (Transcript Loads)	Yes, when using Edge Import	With this enhancement, it is now possible to load training in a completed status in which the completion date is not greater than or equal to the request or registration date.
Edge Import - Localize in all Left to Right Languages	Yes, when using Edge Import	With this enhancement, the Edge Import framework is fully localized to support all languages that read from left to right.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Edge Import - New Learning Load Type (LO Availability) + Changes to Availability Criteria for Training Loads	Yes, when using Edge Import	With this enhancement, a new LO (Learning Object) Availability Load Type is now available.
Edge Import - New Learning Load Types (Online Content)	Yes, when using Edge Import	With this enhancement, new learning load types are available for Online Content within Edge Import.
Edge Import - New Organizational Unit Load Type (Group)		This enhancement is not being released with the February '22 Release. Instead, it will be part of a future package including Group data loads and Group Membership data loads.
Edge Import - New Performance Load Type (Goals)	Yes, when using Edge Import	With this enhancement, a new Edge Import load type is available, which allows customers to create user goals with no tasks or targets.
Edge Import - Restrict Download Report	Yes, when using Edge Import	With this enhancement, a new optional feature is available to limit users to download import result reports for loads only performed by them.
Enhancement to Employee API v2 Constraints	Yes, when using Employee API v2	This enhancement provides an additional configuration option for the existing *Employee API - View - Constrained* permission. Customers can now include user-specific restrictions as part of the constraint definition. This is in addition to the organizational unit-based criteria that was previously delivered with the October ‘21 release.
February '22 Language Pack Updates	Yes	New updates to Cornerstone Language Packs and additional languages are available with the February ‘22 Release. Please visit the **February ‘22 Language Pack Updates** posting to review the full list of changes and their targeted availability in stage and production environments.
Guided Onboarding for Capabilities	Yes	The following enhancements have been made to the Capabilities experience:

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		○ Improved navigation on the administrator pages, allowing administrators to easily return to the main Capabilities administration menu from sub-pages ○ Added additional guidance to existing administrator pages ○ Moved Capabilities Enablement Settings to the Capabilities Administration area for easier access
HTML Sanitizer Library Updates	Yes	In our continued efforts to make the Cornerstone application more secure, we are upgrading our HTML Sanitizer Library. This upgrade will have improved detection and sanitization of malicious code entered via HTML editors. We do not expect disruption to customers, but this might result in some subtle transformations in the underlying HTML/CSS that are functionally equivalent, yet not exactly what the user entered.
Link Custom Skills to the Cornerstone Skills Graph	Yes	With this enhancement, when creating or editing a capability, administrators now have the option to link their custom skill to an equivalent Skills Graph skill, ensuring this skill will appear in suggestions and will feed learning recommendations.
New Standard Report - Groups Criteria Report	Yes	With this enhancement, a new Groups Criteria Report is available in all portals as a standard report so that customers can quickly retrieve the criteria defined for one or more groups in their portal whenever the need arises.
New Standard Report - Security Role - Audit Report	Yes	With this enhancement, a new Security Role - Audit Report is available in all portals as a standard report so that customers can quickly retrieve information related to which users have been assigned to which security roles and the security role modification history.
New Standard Report - Security Role - User Permission Report	Yes	With this enhancement, a new Security Role - User Permission Report is available in all portals as a standard report so that customer can quickly retrieve the roles assigned to a user and the permissions and constraints associated with those roles.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reporting 2.0 – 12hr vs 24hr FTP File Naming Configuration Option	Yes	With this release, users with Reporting - Manage and FTP Delivery permissions will see a new toggle on the Report Builder Automation Settings fly-out as follows: **File Name Time Stamp 24hr.** Enabling this toggle changes the timestamp to a Reporting FTP file name convention.
Reporting 2.0 - Additional Fields	Yes	The following additions and updates have been made to Reporting 2.0 fields with this release: ○ **Cornerstone Learning** ○ **Cornerstone Performance - Goals** ○ **Cornerstone Performance - Observation Checklists**

Reporting 2.0 – Custom Report Migration Tool Enhancements	Yes	○ To support users with many reports, a new "Select all" option lets users select or deselect all reports.
		○ A new filter option lets users view:
		  ○ All Custom Reports already imported into Reporting 2.0
		  ○ All Custom Reports not yet imported into Reporting 2.0
		  ○ All Custom Reports with errors
		This enhancement will be available in a post-release patch.

Reporting 2.0 – Environment Name Included in Subject Line of Report Delivery Email (Excluding Production)	Yes	With this release, for the Stage or Pilot environments only, users will now see the environment name in the Subject line of the Report Delivery emails.
Reporting 2.0 - New Report Scheduling Permission	Yes	With this release, a new permission, Reporting - Schedule Report Automation, lets users without FTP

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		or email deliver access, schedule reports in report builder.
Reporting 2.0 – New Report Type: Standard Form Task	Yes	With this release, the new Standard Form Task report lets users report on Cornerstone HR forms, regardless of form task status.
Reporting 2.0 - Report Downloading Enhancements	Yes	In this release, all options, icons, and actions related to downloading reports are identical when on the Reporting 2.0 Homepage Viewer related pages.
Reporting 2.0 – Report Header Enhancements	Yes	With this release, in the Report Properties in the Report Builder or the Report Output Properties in the Report Viewer, if the **Hide Report Header** toggle is set to "Off" for a report, users can view the following details from the downloaded report: ○ Report Generated Date/Time ○ Report Source - Portal address is displayed as a URL
Reporting 2.0 – "Shared With Me" is Default Folder for Users With Only View Permissions	Yes	In this release, users with view permissions are directed to the "Shared with me folder" on the Reporting 2.0 Homepage. If no reports are available, users will see an error message guiding them to other report folders.
Updated Message for Empty State Landing Pages	Yes	In this release, users with view and manage permissions who select Reporting 2.0 but did not create any reports, are directed to the My Reports folder, and will see an error message suggesting how to proceed.
Reporting 2.0 - Viewer Enhancements	Yes	With this release, preferences defined by the user are automatically saved and will be re-applied the next time the user visits the Reporting 2.0 Viewer page or extracts the report.
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,

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		deprecated, or break applications, scripts, or functionalities that are based on earlier versions of RTDW objects.
Security Health Check	Yes	A new Security Health Check page is now available, allowing customers to view and manage their portal's security settings.
Skill Feedback - Request Feedback About a Specific Person	Yes	With this enhancement, a new feedback template is now available that allows the ability to request others to provide feedback on specific people.
Skills Profile Enhancements	Yes	The Skills Profile is enhanced with the following features: ○ Ability to hide the *Not Developing* section from both the Skills Profile and Skills Wizard. ○ Skills are sorted alphabetically throughout the Skills Profile for all languages.
Total Endorsements	Yes	With this enhancement, it is possible to view a total endorsement count and view a detailed list of endorsements when viewing your own or another user's Skill Details.

Cornerstone HR Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
OU-based Applicability	Yes	With this release, the User Record Custom Field Administration page lets users configure applicability for each individual custom field. Administrators can define the OU criteria for each custom field that specifies which custom fields are applicable to a given user
Workflow Engine	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.

Cornerstone Xplor Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Cornerstone Xplor Overview + Career Explorer Enhancements	Yes	Cornerstone Xplor is a one-stop destination for curated, personalized content that helps employees design their own pathway to success. Learners can identify a realistic pathway for advancement and view the content they need to reach their career goals through self-directed learning intertwined with the context of their job. Users can continually self-assess their skills, so they can see their tangible progression and regular improvements to the content recommendations.

Learning Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Ability to Remove Self-Requested Training After Versioning	Yes	With the February '22 release, end users can now remove self-requested training that was versioned by an administrator after the user requested it. This enhancement is only available in Stage during the Feb '22 release. This enhancement will be made available in Production with the May '22 release.
Ability to Update Custom Certificate Template for All Certifications	Yes	With this enhancement, a new permission is available, which allows administrators to upload and update the custom certificate template for all of their system's certifications via self-service. This enhancement is not available during UAT. It will be made available in all portals on Feb 25, 2022.
Adyen Payment Processor - Self-Service Enablement in Edge Marketplace	No, enable via Edge Marketplace	With this enhancement, administrators can enable the Adyen Payment Processor via self-service using the Edge Marketplace.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Certification Administration - New Option Available for Calculating Credits	Yes	With this enhancement, the **Only the current registration number for any training item will be credited for any given period** checkbox is visible in all portals by default, allowing any organization to use this setting. When this checkbox is selected, only the completion of the current registration number for any training item will be credited for any given period. The certification will ignore previously completed registrations of a training item when applying credit to any period (initial and renewal). This enhancement is not available during UAT.
Content Uploader Enhancement - Ability to Modify Course Manifest File	Yes	With this enhancement, administrators may make select minor updates to the course manifest without triggering a new course version. The fields that may be modified in the course manifest without triggering a new version include: ○ Mastery score ○ Href/launch location ○ Files under "Resources" ○ Title ○ Description ○ Keywords ○ Duration
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 Data Load Wizard Learning Loads will no longer be visible or accessible in customer portals. Data Load Wizard is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.
Deprecation of Microsoft 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.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Improved Experience When Viewing Child Training with Due Dates in the Curriculum Transcript	Enabled via self-service	With this enhancement, the transcript status of child training will be in sync with the due date displayed in the curriculum that the user is currently viewing. For example, if the curriculum's minimum due date is in the past and the user views a training item within the curriculum whose due date is in the future, the user will see the child training item in a status of Registered. The minimum due date of the curriculum does not cause child training items to display as Past Due. This updated behavior will also be accurately reflected in reporting.
Learning Assessments (Open Beta) Enhancements	Yes, in Stage portals only	The expansion of the Learning Assessments open beta continues with the addition of assessment versioning. The following features have been added to the Learning Assessments (Open Beta): ○ **Question Bank** - *See* **Learning Assessments (Open Beta) - Question Bank** on page 223 *for additional information.* ○ **Categories Home** - *See* **Learning Assessments (Open Beta) - Categories Home** on page 220 *for additional information.*
Manage Events and Sessions - Optimized Search Experience (Open Beta)	Yes, in Stage portals only	With the Feb '22 Release, the search functionality on the Manage Events and Session page in Stage environments will begin to utilize "elastic search" technology on the backend when the **Search for all Events** option is selected. Elastic search provides the following benefits: ○ Search results on the Manage Events and Sessions page are displayed faster ○ Users can use special characters in the **Event Name** search field on the Manage Events and Sessions page ○ Access to event options is now provided through a drop-down menu ○ Elastic search provides a more stable search infrastructure This project is currently in an Open Beta status and is available in **Stage portals only** at this time. It is not available at the start of UAT.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Manager Ability to Remove Directly-Assigned Training After Versioning	Yes	With the February '22 release, managers can now remove training they assigned to a user from the user's transcript even if the training was versioned after the manager assigned it, or even if the training has multiple registration numbers since its initial assignment, if all registrations were from the training being directly-assigned or self-requested. If previous registrations were from the Learning Assignment Tool or an administrator assignment, managers will not be able to remove the training. This enhancement is only available in Stage during the Feb '22 release. This enhancement will be made available in Production with the May '22 release.
Microsoft Teams vILT Integration Enhancements	Yes	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
New ILT Preference for Incomplete Session Removal from Transcript	Yes	With this enhancement, a new preference option is available on the ILT Preferences page, allowing administrators to decide whether sessions in an Incomplete status retain their Incomplete status when removed from a user's transcript. This option provides more flexibility in how an instructor-led training (ILT) session is removed from transcripts via self-removal, manager removal, or Training Removal Tool job.
New ILT Preference for No Show Session Removal from Transcript	Yes	With this enhancement, a new preference option is available on the ILT Preferences page, allowing administrators to decide whether sessions in a No Show status retain their No Show status when removed from a user's transcript. This option provides more flexibility in how an instructor-led training (ILT) session is removed from transcripts via self-removal, manager removal, or Training Removal Tool job.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION

New Payment Processor - NIC Colorado	Enable via Edge	With this enhancement, the new NIC Colorado Payment Gateway has been made available to help support US government customers. This new payment gateway has been implemented to support transactions including:
		○ Credit card and e-check payment methods
		○ Tax calculation
		○ Processing fee calculation, calculated as:
		  ○ Percentage applied over the purchase order total value
		  ○ Fixed value
		  ○ Formula (using the purchase order total value)

New Payment Processor - PayPoint	Enable via Edge	With this enhancement, the new PayPoint Payment Gateway is available. This new payment gateway has been implemented to support transactions including:
		○ Credit card and e-check payment methods
		○ Tax calculation
		○ Processing fee calculation, calculated as:
		  ○ Percentage applied over the purchase order total value
		  ○ Fixed value
		  ○ Formula (using the purchase order total value)

Reassigned Child Training Remains Completed in Completed Curriculum	Yes	With this enhancement, completions of child training items will remain in a Completed status within completed curricula even if one of the child training items is reassigned to the user separately.
Remove "Search Engine" Search Preference	Yes	With the Feb '22 Release, the configuration options to select between Global Search and Learning Search are removed from the Search Preferences page. If the Traditional Search option was selected on the Search Preferences page prior to this preference removal enhancement, that preference will continue to be preserved in the portal until the portal is migrated to the Learning Search engine. Clients will be notified at least three weeks in advance of their portals'

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
		migration to Learning Search. For portals already using Learning Search, no migration will occur.
Reporting Fields - Learning	Yes	With this enhancement, the following existing Learning fields have been updated: ○ Curriculum Child Training Transcript Status ○ Latest Curriculum Version? ○ User's Course Rating Date With this enhancement, the following new Learning fields have been added to the Transcript section of Reporting 2.0: ○ Last Accessed ○ Total Views ○ Removed By (Name) ○ Removed By (User ID) ○ Vendor Name ○ Active (on Vendors page) ○ Active (on Instructors page) ○ Email (on Instructors page) ○ Location (on Instructors page) ○ Instructor Name ○ Instructor Name - First Name ○ Instructor Name - Last Name
"Session Changed" Email and Other Enhancements	Yes	With this enhancement, the Session Changed email will trigger after the session start date for current or future parts, when using a part-specific condition (only the condition TIMETABLE.CHANGED is a part-related condition). When using no condition or a session-related condition, the email will also trigger after the session start date if the last part is not yet completed. Also, additional conditions can be configured for the Session Changed email, two new tags have been added, and the on-screen instructions upon modifying pre- or post-work have been made clearer to increase administrator understanding that this change will be communicated to recipients of the email.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
SF-182 Form Enhancements	Yes	With the Feb '22 Release, the SF-182 form functionality available in the Cornerstone system has been enhanced with sections D, E, and F to ensure it meets all SF-182 form requirements. The following enhancements are included: ○ Pre-training approval workflows can be configured to support Section D and E ○ The ability to add groups as approvers in the pre-training approval workflow has been added ○ The ability to print Section D, E and F on the SF-182 form has been added ○ The Training Details page displays Section D, E and F ○ The ability to copy an SF-182 form from a learner's transcript has been added ○ Copy logic on the SF-182 Request Administration page has been enhanced so that the copied SF-182 form includes the original users ○ Cosmetic changes have been made to ensure the Cornerstone SF-182 form matches the current SF-182 format
Support for Online Content in Training Update Tool	Yes	With the February '22 Release, administrators can use the Training Update Tool to update online content training in bulk on learner transcripts.
Titles Added to Transcript Filters	Yes	With this enhancement, titles have been added above the filters and the search bar on the Transcript page, to help learners clearly identify the purpose of the filters and search features and also allow for screen reader capability. The following text has been added over the following features: ○ Training status filter drop-down - "Filter by Training Status" ○ Sort By drop-down filter - "Sort By" ○ Training type drop-down filter - "Training by Training Type" ○ Search bar - "Search by Keyword"

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Training Removal Tool Enhancements	Yes	With the Feb '22 Release, the following enhancements have been made to the Training Removal Tool: ○ The online content training type can now be removed via a training removal job ○ The “Training ID” column header in the Training Removal Tool CSV template is renamed to “Training Object ID" to accurately reflect the data type required by the column
Transcript and Curriculum Page Auto-Refresh After Closing AICC Course	Yes	With this enhancement, when a user launches an AICC course from their transcript or from within a curriculum and then the user closes the course window, the transcript or curriculum page automatically refreshes to immediately display the user's updated course status (In Progress or Complete, depending on whether the user completed the course).

Performance Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Performance Review Email Digest Enhancements	Yes	With this release, Email Digest emails no longer include past-due notifications for optional or locked performance review steps after the step due date. Additionally, the Performance Review > Review Steps page now includes a **Exclude from Digest Email** checkbox that allows administrators to exclude individual performance review tasks.
Reporting Fields – Goals	Yes	With this enhancement, the following Goals reporting fields are now available in Reporting 2.0: ○ Goal Comment Author ○ Goal Comments ○ Goal Comment Date

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Reporting Fields – Observation Checklists	Yes	With this enhancement, the following Observation Checklist reporting fields are now available in Reporting 2.0: ○ Co-Planner Added By ○ Co-Planner Added Date ○ Co-Planner ID ○ Co-Planner Name ○ Observation Notes

Recruiting Features

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Candidate Document Management - Recruiter Workflow	Yes	With this enhancement, recruiters can now delete attached documents on the APPLICANT PROFILE > DOCUMENTS tab or ATTACHMENTS tab by selecting the delete icon.
Hired Application Data Retention	No. Contact Global Customer Support (GCS) to enable this feature.	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. This feature was released as part of the 12 November 2021 patch.
Instant Data Deletion and Anonymization	No. Contact Global Customer Support (GCS) to enable this feature.	With this release, customers can enable instant application data deletion and profile anonymization.
Manage Candidates View Profile - Link to Legacy Applicant Profile	Yes	With this enhancement, a new icon and Application Profile link is added to the Manage Candidates View Profile that opens the legacy Applicant Profile in a new window, in the context of the candidate cohort.

FEATURE NAME	AUTOMATICALLY ENABLED?	DESCRIPTION
Manage Candidates - Email Trigger Enhancements for Integration Assessments	Yes	With this enhancement, there is clearer email communication regarding the successful or unsuccessful assignment of an assessment using assessment integration as follows: ○ Updated behavior of the Assign Integration Assignment email trigger ○ New "Integration Assessment Assignment Status - Error" email trigger

New and Enhanced Permissions for February '22 Release

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

New Permissions

The following permissions are new for the February '22 release:

Core/General

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Bulk API - LMS - Curriculum Transcripts	Grants ability to use the Bulk API to load curriculum transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Curriculum	Grants ability to use the Bulk API to load curriculum learning object and structure data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Events	Grants ability to use the Bulk API to load event learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - External Training Transcripts	Grants ability to use the Bulk API to load external training transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import

Access Bulk API - LMS - ILT Transcripts	Grants ability to use the Bulk API to load instructor-led training (ILT) transcript data, session transcript custom fields data, and event transcript custom fields data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Material Transcripts	Grants ability to use the Bulk API to load material transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Material	Grants ability to use the Bulk API to load material learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Online Course	Grants ability to use the Bulk API to load online course learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Online Transcripts	Grants ability to use the Bulk API to load online transcripts data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Session Parts	Grants ability to use the Bulk API to load session parts data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import

Access Bulk API - LMS - Sessions	Grants ability to use the Bulk API to load event session data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Test Mapping	Grants ability to use the Bulk API to load test mapping data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Test Transcripts	Grants ability to use the Bulk API to load test transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Test	Grants ability to use the Bulk API to load test learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Video Transcripts	Grants ability to use the Bulk API to load video transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Video	Grants ability to use the Bulk API to load video learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import

Access LMS - LO Availability Load	Grants access to the LO (Learning Object) Availability data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Metadata Load	Grants access to the Online Content Metadata data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Load	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Capabilities - Skills Library Builder	Grants ability to import relevant Cornerstone Skills Graph skills based on user profile data and generate skill suggestions via the Skills Library Builder page. This permission cannot be constrained. This is an administrator permission.	Core Administratio n
Download Reports Access when portal opts-in for Restrict reports access - Edge Import	Grants ability to download Edge Import load details reports for loads performed by others. Users who do not have this permission cannot download load import results for loads performed by others. In addition, users without this permission cannot load data for someone who has previously only validated their data. This permission cannot be constrained. This is an administrator permission. This permission is only available and applicable when the portal has enabled the restriction for Edge Import load details report access.	Edge
Edge Import - Employee Load Constrained	This permission enables organizations to constrain an administrator's ability to load employee data. Administrators can only load employee data if the employee is within the constraints on this permission. This permission can be constrained by OU. This is an administrator permission.	Edge Import

Edge Import - User Goal Load	Grants access to the User Goal Load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Groups Criteria Report	Grants access to the Group Criteria Report, which enables organizations to retrieve the criteria defined for one or more groups in their portal. This permission cannot be constrained.	Reports - System
Reporting - Admin Custom Report Migration	Grants access to any user to see and import all Custom Reports available in the portal. This permission cannot be constrained. This permission is automatically assigned to the Cornerstone administrator and System Administrator security roles.	Reporting
Reporting - Form Tasks - Manage	Grants access to manage the Form Tasks report, which enables administrators to report on the Forms part of Forms Tasks in any status.	Reporting
Reporting - Form Tasks - View	Grants access to the Form Tasks report, which enables administrators to report on the Forms part of Forms Tasks in any status.	Reporting
Reporting - Schedule Report Automation	Grants access to schedule reports in report builder for users that don't have access to FTP or email delivery.	Reporting
Security Health Check - View	Grants ability to view the Security Health Check tool. This permission cannot be constrained. This is an administrator permission.	Core Administration
Security Role - Audit Report	Grants access to the Security Role - Audit Report, which enables organizations to report on which users have been assigned to which security roles and the security role modification history. This permission cannot be constrained.	Reports - System

Security Role - User Permission Report	Grants access to the Security Role - User Permission Report, which enables organizations to report on the roles assigned to a user and the permissions and constraints associated with those roles. This permission cannot be constrained.	Reports - System
User Ratings - Feedback on specific person	Grants ability to request 360 feedback about a specific user. This permission is intended for administrators, managers, or other leadership roles. This permission can be constrained to User, OU, User's OU, User Self and Subordinates and User's Direct Subordinates. It is recommended to constrain this permission. Managers should be constrained to "User's Direct Reports." Administrators can constrain themselves or others to a diverse pool of potential raters.	Core Administration

Cornerstone HR

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

Learning

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Custom Certificate Update	This permission grants access to the **Update Certificate for All Certifications** link on the Certification Administration page. The **Update Certificate for All Certifications** link allows administrators to upload and modify a certificate template for all the certifications in the system at once. This is an administrator permission. This permission cannot be constrained.	Learning - Administration
Copy SF-182 Training from Transcript	This permission allows users to copy an SF-182 form from their transcript. Users with this permission will see a **Copy SF-182** option in the **Options** drop-down menu for SF-182 forms on their transcript.	Learning

	This permission can be constrained by Restrict to User Self and Subordinates, User Self, or User's Direct Subordinates. If you wish to leverage this permission, please reach out to Global Customer Support and ask for the *Copy SF-182 Training From Transcript* feature to be enabled).	

Recruiting

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Delete Document	Grants ability to access and manage delete and replace documents on the Applicant Profile > Documents tab or Attachments tab. This permission can be constrained by OU. This is an administrator permission	Recruiting

Enhanced Permissions

The following existing permissions are enhanced for the February '22 release:

Core/General

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 User, 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. This permission is only available when the Employee API v2 is enabled via Edge Marketplace.	Edge

Master List of New Report Fields for February '22 Release

This page provides the master list of new report fields for the February '22 release.

Learning

FIELD NAME	SECTION
Last Accessed	Transcript
Removed By (Name)	Transcript
Removed By (User ID)	Transcript
Total Views	Transcript
Active (on Vendors page)	Training > Vendor
Active (on Instructors page)	Training > Vendor
Email (on Instructors page)	Training > Vendor
Instructor Name	Training > Vendor
Instructor Name - First Name	Training > Vendor
Instructor Name - Last Name	Training > Vendor
Location (on Instructors page)	Training > Vendor
Vendor Name	Training > Vendor

Performance

FIELD NAME	SECTION
Goal Comments	Goals
Goal Comment Create Date	Goals
User Full Name	Goals > Goal Comment Author
User ID	Goals > Goal Comment Author
Observation Notes	Observation Checklists
User Full Name	Observation Checklists > Co-Planner Added By
User ID	Observation Checklists > Co-Planner Added By
Added Date	Observation Checklists > Co-Planner
User Full Name	Observation Checklists > Co-Planner
User ID	Observation Checklists > Co-Planner

Release Notes Updates for February '22 Release

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

Changes made on 18 March 2022

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	Updated the following important note: **Important:** For customers in one of the following scenarios, we do not recommend migration of Inbound Data Feed (IDF) for Users and OUs from Data Load Wizard to Edge Import at this time: 1. Customers using Data Load Wizard Group OU loads. 2. Customers using Cornerstone Recruiting who also use Cornerstone's Applicant Conversion feature. 3. Customers using GUID as You are a Customer using GUID for purpose of Userid changes AND loading Userid relationships in the same file (ManagerID, ApproverID, Custom Employee Relationshp ID), not for applicant conversion. An additional enhancement is planned for Edge Import that will support this functionality. Once this enhancement is released, there will then be a three-month period to allow for migration for these customers. If your portal uses Cornerstone Recruiting, GUID in Data Load Wizard loads and feeds, or has Group OU data loads, you will be automatically excluded from the migration in May. If your portal does not match these scenarios but this migration impacts you, please log a case via Support Central to request an extension to the migration and deprecation date with the May ’22 release.

Changes made on 25 February 2022

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Bulk API - Support Learning Loads	Bulk API - Support Learning Loads	Added the appropriate link to API Explorer for additional details about the API.
Deprecation of Learning Loads for Data Load Wizard (DLW) with the May '22 Release	Deprecation of Learning Loads for Data Load Wizard (DLW) with the May '22 Release	The deprecation of Learning Loads for Data Load Wizard has been delayed until the May '22 Release. **Please select this link to visit the Success Center for additional information.**
February '22 Language Pack Updates	February '22 Language Pack Updates	Added the following additional languages: ○ Arabic ○ Armenian ○ Basque ○ Bulgarian ○ Chinese Simplified ○ Chinese Traditional ○ Czech ○ Dutch ○ English (AU) ○ English (UK) ○ French Canada ○ Hebrew ○ Indonesian ○ Japanese ○ Latvian ○ Malaysian ○ Norwegian ○ Romanian ○ Russian ○ Serbian ○ Slovenian ○ Spanish Latin America ○ Swedish

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		The following languages had additional updates on February 22: ○ Catalan ○ Croatian ○ Dutch ○ Finnish ○ French (France) ○ German ○ Greek ○ Hungarian ○ Italian ○ Korean ○ Lithuanian ○ Polish ○ Portuguese (Brazil) ○ Portuguese (Portugal) ○ Slovak ○ Spanish (Spain) ○ Thai ○ Turkish ○ Ukrainian ○ Vietnamese
New Standard Report - Groups Criteria Report	New Standard Report - Groups Criteria Report	Noted that groups that do not have any criteria are not included in this report.

Reporting 2.0 - Viewer Enhancements	Reporting 2.0 - Viewer Enhancements	○ Made the following changes in the New Options Available in the Reporting 2.0 Viewer Page section:
		  ○ Removed reference to Auto-refresh on open option.
		  ○ Added additional items to Report Configuration Properties
		  ○ Added Reset Filters option information
		
		○ Added the following in the Considerations section:

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
		○ User preferences override what is configured in the builder for all report configuration properties, except when **Display filter criteria** or **Auto-Refresh on Open** options are set to Off in report builder. This applies per user per report.
Reporting 2.0 - Report Downloading Enhancements	Reporting 2.0 - Report Downloading Enhancements	○ Added a graphic showing the download icon. ○ Added the following consideration: PDF and HTML appear as format options in the snapshot pop-up when the number of records in the snapshot is 10K or less.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Improved Experience When Viewing Child Training with Due Dates in the Curriculum Transcript	Improved Experience When Viewing Child Training with Due Dates in the Curriculum Transcript	Added the following note: ***Note:*** *It may take several hours for the Past Due status to appear in the transcript.*
New ILT Preference for Incomplete Session Removal from Transcript	Configure ILT Preferences - Withdraw Users When Incomplete Sessions are Removed	In the following sentence, changed the word "Removed" to "Withdrawn" : If the **Withdraw users when Incomplete sessions are removed** option IS selected on the ILT Preferences page, the user will be withdrawn from the session and the session will be removed from the user's transcript. The removed session will have a transcript status of Withdrawn and will be moved to the Removed tab of the transcript.
New ILT Preference for No Show	Configure ILT Preferences - Withdraw	In the following sentence, changed the word "Removed" to "Withdrawn" : If the **Withdraw users when No Show sessions are removed** option IS

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Session Removal from Transcript	Users When No Show Sessions are Removed	selected on the ILT Preferences page, the user will be withdrawn from the session and the session will be removed from the user's transcript. The removed session will have a transcript status of Withdrawn and will be moved to the Removed tab of the transcript.
Reporting Fields - Learning	Reporting Fields - Learning	Updated the names of several new fields to match the actual system display names of these fields.

Performance

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Reporting Fields - Goals	Reporting Fields - Goals	Updated the names of new fields to match the system display names.
Reporting Fields - Observation Checklists	Reporting Fields - Observation Checklists	Updated the names of new fields to match the system display names.

Changes made on 14 February 2022

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Bulk API - Support Learning Loads	Bulk API - Support Learning Loads	Removed the *Access Bulk API - LMS - Curriculum Structure* permission. Updated the description for the *Access Bulk API - LMS - Curriculum* and *Access Bulk API - LMS - ILT Transcripts* permissions. Updated the title for the *Access Bulk API - LMS - ILT Transcripts*, *Access Bulk API - LMS - Material Transcripts*, *Access Bulk API - LMS - Test Transcripts*, and *Access Bulk API - LMS - External Training Transcripts* permissions.
February '22 Language Pack Updates	February '22 Language	Added Thai and Ukrainian to the list of updated languages.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Pack Updates	

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Support for Online Content in Training Update Tool	Support for Online Content in Training Update Tool	Added a note that this enhancement is available for user acceptance testing as of the February 8 stage deployment.
Titles Added to Transcript Filters	Titles Added to Transcript Filters	Updated screen shot to accurately reflect new filter names.
Training Removal Tool Enhancements	Training Removal Tool Enhancements	Added a note that support for online content removal is available for user acceptance testing as of the February 8 stage deployment.

Changes made on 9 February 2022

Core

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Edge Import - Learning Load Enhancement (Online Course Transcript Load)	Edge Import - Learning Load Enhancement (Online Course Transcript Load)	Transcript statuses for online courses cannot be updated from Completed to Failed.
Edge Import - New Learning Load Type (LO Availability) and Changes to Availability Criteria for Training Loads	Edge Import - New Learning Load Type (LO Availability) and Changes to Availability Criteria for Training Loads	In the *Impact to Existing Training Load Types and Saved Template Configurations* section, noted that if an existing saved configuration contains mappings for one or more of the availability-related fields, these configurations must be recreated without the availability fields.
Edge Import - New Organizational Unit Load Type (Group)	Edge Import - New Organizational	This enhancement is not being released with the February '22 Release. Instead, it will be part

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Unit Load Type (Group)	of a future package including Group data loads and Group Membership data loads.
HTML Sanitizer Library Updates	HTML Sanitizer Library Updates	This is a new enhancement.

Cornerstone HR

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
OU-based Applicability	OU-based Applicability	Added the following in the Consideration section: This feature only impacts existing inbound data feeds whenever the defaulted applicability setting for custom fields is adjusted and is no longer defined as “All Users”.The applicability logic is also taken into account in the inbound data feeds.

Learning

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Ability to Remove Self-Requested Training After Versioning	Ability to Remove Self-Requested Training After Versioning	Updated topic to state that this enhancement is only available in Stage portals with the Feb '22 release. Also added an excluded scenario to the Exclusions section.
Adyen Payment Processor - Self-Service Enablement in Edge Marketplace	Adyen Payment Processor - Self-Service	Added a link to the Edge Guide for this feature.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
	Enablement in Edge Marketplace	
Manager Ability to Remove Directly-Assigned Training After Versioning	Manager Ability to Remove Directly-Assigned Training After Versioning	Updated topic to state that this enhancement is only available in Stage portals with the Feb '22 release. Also added an excluded scenario to the Exclusions section.
New Payment Processor - PayPoint	New Payment Processor - PayPoint	Added a link to the Edge Guide for this feature.
New Payment Processor - NIC Colorado	New Payment Processor - NIC Colorado	Added a link to the Edge Guide for this feature.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Candidate Document Management - Recruiter Workflow	Candidate Document Management - Recruiter Workflow	○ Updated introductory sentence to remove information about uploading attachments. ○ Updated Considerations section.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Instant Data Deletion and Anonymization	Instant Data Deletion and Anonymization	Added the following to the Implementation section: This feature is off by default. Contact Global Customer Support (GCS) to enable this feature **or to manage existing applications that you may want to remove from the portal.**

Changes made on 03 February 2022

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Custom Reports – Limit How Long Snapshots Are Stored	Custom Reports – Limit How Long Snapshots Are Stored	Added link to Custom Reports - Deprecation Guide.
Reporting 2.0 topics	Reporting 2.0 topics	Added links to updated Starter Guides and Adoption Kits.

Cornerstone Xplor

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Cornerstone Xplor Overview + Career Explorer (Early Adopter) Enhancements	Cornerstone Xplor Overview + Career Explorer (Early Adopter) Enhancements	○ Changed content from this: "Career Explorer was previously available as a beta but has reached General Availability with the February ’22 Release." to this: ". Career Explorer was previously available as a beta but has reached Early Adopter phase with this release." ○ Added a link to Starter Guide.

Recruiting

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Candidate Document Management - Recruiter Workflow	Candidate Document Management - Recruiter Workflow	○ Removed information about Attachments tab. ○ Added link to Starter Guide.

ENHANCEMENT NAME	NAME OF UPDATED TOPIC	PURPOSE OF CHANGE
Manage Candidates - Email Trigger Enhancements for Integration Assessments	Manage Candidates - Email Trigger Enhancements for Integration Assessments	Added for error email trigger: The new email is sent if there is an error with a manual or auto-assignment of the integration.

25 March Patch Release Functionality

What's New for the 25 March 2022 Patch Release

The following is released along with the 25 March 2022 patch release:

MODULE	FEATURE	DESCRIPTION
Core/General	Edge Import - Learning Load Enhancement (ILT Events and ILT Sessions Loads)	New optional fields are added to the Instructor Led Training (ILT) Events load and the Instructor Led Training Sessions load. These new fields allow for updating of the Event ID and Session ID.
Core/General	Edge Import - Learning Load Enhancements (Online Content Metadata Load)	With this enhancement, the following fields in the OLCO Metadata load are changed from Required to Optional: ○ Online Content Name ○ Online Content Description ○ Thumbnail URL With this enhancement, the following fields in the OLCO Metadata load were previously Required, and they are now removed from the data load: ○ Vendor/Provider ○ Provider Type ○ URL As a result of these changes, any existing data load configurations should be deleted, and a new configuration should be created.

Core/General

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

New optional fields are added to the Instructor Led Training (ILT) Events load and the Instructor Led Training Sessions load. These new fields allow for updating of the Event ID and Session ID.

For the Events load, when LOID (Learning Object ID) is selected as the unique identifier for the load, an optional **New Event ID** field is now available. This enables organizations to update the Event ID for events. The Event ID value is only updated if a new Event ID value is provided; it cannot be updated with a blank value. The Event ID value does not need to be unique.

For the Sessions load, when Session Locator Number is selected as the unique identifier for the load, an optional **New Session ID** field is now available. This enables organizations to update the Session ID for sessions. The Session ID value is only updated if a new Session ID value is provided; it cannot be updated with a blank value. The Session ID value does not need to be unique.

If Event ID and Session ID are not unique for each event and session in your portal or database, they should not be used as the unique identifier to perform loads.

Implementation

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

Permissions

The following existing permissions apply to this functionality:

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

Edge Import - Learning Load Enhancements (Online Content Metadata Load)

The Online Content (OLCO) Metadata load was added with the February '22 release.

With this enhancement, the following fields in the OLCO Metadata load are changed from Required to Optional:

- Online Content Name
- Online Content Description
- Thumbnail URL

With this enhancement, the following fields in the OLCO Metadata load were previously Required, and they are now removed from the data load:

- Vendor/Provider
- Provider Type
- URL

As a result of these changes, any existing data load configurations should be deleted, and a new configuration should be created.

Implementation

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

As a result of these changes, any existing data load configurations should be deleted, and a new configuration should be created.

Permissions

The following existing permission applies to this functionality:

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

8 April Patch Release Functionality

What's New for the 8 April 2022 Patch Release

The following is released along with the 8 April 2022 patch release:

MODULE	FEATURE	DESCRIPTION

Core/General	Reporting 2.0 - Custom Report Migration Tool Enhancements	The Reporting 2.0 - Custom Report Migration Tool Enhancements are intended to improve the Reporting 2.0 Custom Migration Tool as follows:
		○ To support users with many reports, a new "Select all" option lets users select or deselect all reports.
		○ A new filter option lets users view:
		  ○ All Custom Reports already imported into Reporting 2.0
		  ○ All Custom Reports not yet imported into Reporting 2.0
		  ○ All Custom Reports with errors

Recruiting	VONQ Job Post Integration	VONQ Job Post is an automation solution for high volume recruitment that reduces complexity and saves time. This integration simply and automatically distributes jobs to multiple sources, including programmatic advertising. Administrators can use the return on investment reports to make informed decisions about which sources deliver candidates at the lowest cost.

Core/General

Reporting 2.0 - Custom Report Migration Tool Enhancements

The Reporting 2.0 - Custom Report Migration Tool Enhancements are intended to improve the Reporting 2.0 Custom Migration Tool as follows:

- To support users with many reports, a new "Select all" option lets users select or deselect all reports.
- A new filter option lets users view:
  - All Custom Reports already imported into Reporting 2.0
  - All Custom Reports not yet imported into Reporting 2.0
  - All Custom Reports with errors

Additionally, in the report list, a "Last Imported" column now provides the date reports were last imported.

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.

Recruiting

VONQ Job Post Integration

VONQ Job Post is an automation solution for high volume recruitment that reduces complexity and saves time. This integration simply and automatically distributes jobs to multiple sources, including programmatic advertising. Administrators can use the return on investment reports to make informed decisions about which sources deliver candidates at the lowest cost.

This integration will be available in Edge Marketplace on April 11.

Implementation

This integration is available for self-activation in Edge Marketplace via the VONQ Job Post integration tile. This integration is for Cornerstone customers that also have an account with the integration vendor.

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

Content Anytime - Q1 Updates

Refreshes to Content Anytime and a la carte subscriptions occur every month! New titles are added to libraries monthly and removals occur quarterly. Content Anytime subscribers automatically receive their subscription refreshes.

Target dates for Q1 refreshes are listed below. Please refer to the 2022 **Content Refresh Calendar** for the timing of refreshes for all of 2022.

- January 14 - January 21: Additions Only
- February 11 - February 18: Additions Only
- March 4 - March 11: Removals & Additions

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 a la carte subscriptions.

Core/General

Core/General Enhancements

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

Important: *The deprecation of Learning Loads for Data Load Wizard has been delayed until the May '22 Release.* ***Please select this link to visit the Success Center for additional information.***

Ability to perform learning data loads using Data Load Wizard will be deprecated with an end-of-life in the May ‘22 Release. Defects will no longer be fixed, and Data Load Wizard Learning Loads will no longer be visible or accessible in customer portals. Data Load Wizard is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

Edge Import addresses these issues with a modern 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 May ‘22 Release, which will be the end-of-life date and end-of-support for Data Load Wizard learning data loads.

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.

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 Data Load Wizard Users and OU loads and feeds.

Important: For customers in one of the following scenarios, we do not recommend migration of Inbound Data Feed (IDF) for Users and OUs from Data Load Wizard to Edge Import at this time:

1. Customers using Data Load Wizard Group OU loads.
2. Customers using Cornerstone Recruiting who also use Cornerstone's Applicant Conversion feature.
3. Customers using GUID as You are a Customer using GUID for purpose of Userid changes AND loading Userid relationships in the same file (ManagerID, ApproverID, Custom Employee Relationshp ID), not for applicant conversion.

An additional enhancement is planned for Edge Import that will support this functionality. Once this enhancement is released, there will then be a three-month period to allow for migration for these customers.

If your portal uses Cornerstone Recruiting, GUID in Data Load Wizard loads and feeds, or has Group OU data loads, you will be automatically excluded from the migration in May. If your portal does not match these scenarios but this migration impacts you, please log a case via Support Central to request an extension to the migration and deprecation date with the May ’22 release.

February '22 Language Pack Updates

New updates to Cornerstone Language Packs and additional languages are available with the February ‘22 Release. Please visit the **February ‘22 Language Pack Updates** posting to review the full list of changes and their targeted availability in stage and production environments.

Languages with updates for the February ‘22 Release include:

- Arabic
- Armenian
- Basque
- Bulgarian
- Catalan - Additional updates were added on February 22.
- Chinese Simplified
- Chinese Traditional
- Croatian - Additional updates were added on February 22.
- Czech
- Danish
- Dutch - Additional updates were added on February 22.
- English (AU)
- English (UK)
- Finnish - Additional updates were added on February 22.
- French (France) - Additional updates were added on February 22.
- French (Canada)
- German - Additional updates were added on February 22.
- Greek - Additional updates were added on February 22.
- Hebrew
- Hungarian - Additional updates were added on February 22.
- Indonesian
- Italian - Additional updates were added on February 22.
- Japanese
- Korean - Additional updates were added on February 22.
- Latvian
- Lithuanian - Additional updates were added on February 22.
- Malaysian
- Norwegian
- Polish - Additional updates were added on February 22.
- Portuguese (Brazil) - Additional updates were added on February 22.
- Portuguese (Portugal) - Additional updates were added on February 22.
- Romanian
- Russian
- Serbian
- Slovak - Additional updates were added on February 22.
- Slovenian

- Spanish (Latin America)
- Spanish (Spain) - Additional updates were added on February 22.
- Swedish
- Thai - Additional updates were added on February 22.
- Turkish - Additional updates were added on February 22.
- Ukrainian - Additional updates were added on February 22.
- Vietnamese - Additional updates were added on February 22.

Implementation

This functionality is automatically enabled for all organizations.

Guided Onboarding for Capabilities

Guided Onboarding for Capabilities - Overview

This enhancement benefits administrators who are implementing a Skills framework for the first time or are unfamiliar with the Cornerstone's Capabilities product.

The following enhancements have been made to the Capabilities experience:

- Improved navigation on the administrator pages, allowing administrators to easily return to the main Capabilities administration menu from sub-pages
- Added additional guidance to existing administrator pages
- Moved Capabilities Enablement Settings to the Capabilities Administration area for easier access

How Does this Enhancement Benefit My Organization?

Guided onboarding helps administrators focus on the most meaningful tasks to enable Capabilities for their organization. By streamlining navigation and providing better guidance in the administrator experience, customers get up and running with Skills in no time.

Implementation

This functionality is automatically enabled for all organizations.

The Capabilities Enablement Settings previously located in Corporate Preferences are moved to the Skills Library Builder page. Access to the Skills Library Builder page is controlled by the *Capabilities - Skills Library Builder* permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Library Builder	Grants ability to import relevant Cornerstone Skills Graph skills based on user profile data and generate skill suggestions via the Skills Library Builder page. This permission cannot be constrained. This is an administrator permission.	Core Administration

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 Administratio n

Corporate Preferences - Manage	Grants ability to manage Corporate Preferences, which includes several portal-wide settings. This is an administrator permission.	Core Administratio n

Security Roles

Upon release, the new *Capabilities - Skills Library Builder* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

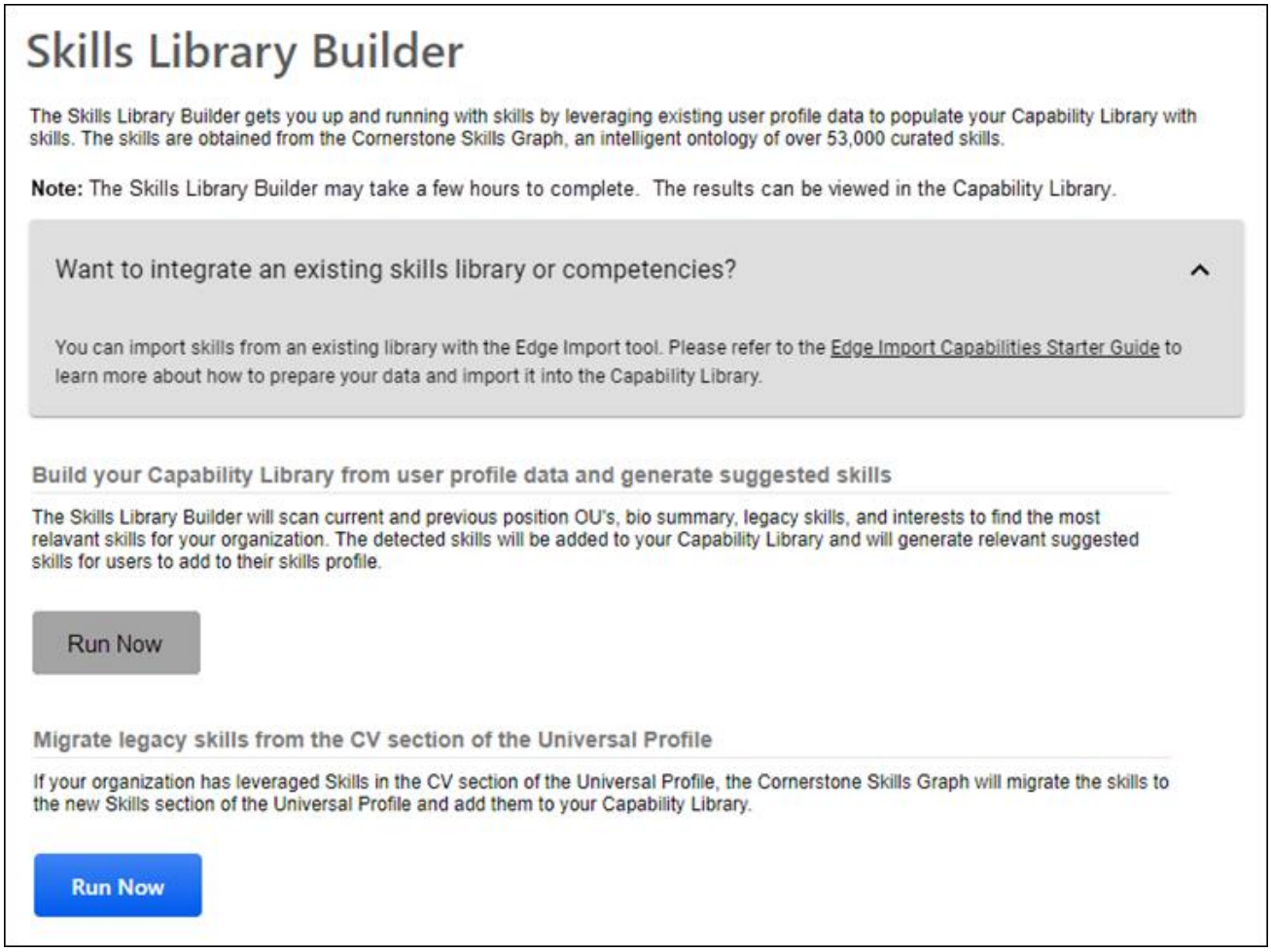
Skills Library Builder

The Skills Library Builder enables administrators to quickly build the organization's skills library using data that already exists in user profiles.

To access the Skills Library Builder, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > SKILLS LIBRARY BUILDER.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Library Builder	Grants ability to import relevant Cornerstone Skills Graph skills based on user profile data and generate skill suggestions via the Skills Library Builder page. This permission cannot be constrained. This is an administrator permission.	Core Administration



Build your Capability Library from user profile data and generate suggested skills

Select the **RUN NOW** button to run a full portal scan, which uses the Skills Graph to generate suggested skills for each active user in the portal. The top suggested skills are automatically imported into your library, generating a pre-populated Capabilities Library tailored to your organization.

This process may be run periodically, if necessary.

Migrate legacy skills from the CV section of the Universal Profile

Select the **RUN NOW** button to copy all of the skills from the Resume or CV section of the Universal Profile to the Capabilities Library. Selecting this option does not remove the skills from the user's Resume in Universal Profile.

This process may be run periodically, if necessary.

Corporate Preferences - Capabilities Enablement

With this enhancement, the Capabilities Enablement options are removed from the Corporate Preferences page. These options are now available on the Skills Library Builder page. *See* **Skills Library Builder** on page 59 *for additional information.*

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

Permissions

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

Improved Navigation for Capabilities Administration Pages

With this enhancement, navigation breadcrumbs have been added to the following pages:

- Capabilities Library - Breadcrumbs have been added to easily navigate to the Core Functions or Capabilities pages.
- Proficiency Levels - Breadcrumbs have been added to easily navigate to the Core Functions or Capabilities pages.
- Edit Proficiency Level - Breadcrumbs have been added to easily navigate to the Core Functions or Capabilities pages. If the administrator selects a breadcrumb link while there are unsaved changes to the proficiency level, an alert is displayed before discarding the changes.
- Skills Profile Preferences - Breadcrumbs have been added to easily navigate to the Core Functions or Capabilities pages. In addition, the **CANCEL** button is removed from this page.

Updated Descriptions and Help for Capabilities Administration

With this enhancement, page descriptions and contextual help have been enhanced on the following pages:

- Proficiency Levels - The page description is updated on this page.
  - Page Description: Proficiency levels are the response options available to users when rating capabilities. When a user's capabilities are rated using proficiency levels, this helps organizations to easily compare across skills and people. From this page, you can define the standard language your organization uses for rating skills. There is a limit of 10 proficiency levels per portal.
- Edit Proficiency Levels - The page description and contextual help are updated on this page.
  - Page Description: From this page, you can define the standard language your organization uses for rating skills. There is a limit of 10 proficiency levels per portal. From this page, you can define the standard language your organization uses for rating skills. There is a limit of 10 proficiency levels per portal.
  - Contextual Help: Adding, removing, and reordering levels is only allowed in your organization's default culture. The number of levels and their order will reflect the same across all cultures. Use the language dropdown to localize the Name and Description values for the selected language. Proficiency levels are not meant to be changed frequently. Proficiency levels cannot be removed once they have been used in a capability.
- Skills Profile Preferences - The page description and contextual help are updated on this page.
  - Page Description: Define which features will appear on the Skills Profile of all users in your organization.
  - Learning Recommendations in Skill Details: This toggle controls whether users are presented with learning recommendations when viewing the Skills Details.
  - Compare Skills: This toggle enables a single overview of a user's skills in the universal profile skills menu, and compares their associated ratings on multiple dimensions such as proficiency, interest, and enjoyment.
  - 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.

HTML Sanitizer Library Updates

In our continued efforts to make the Cornerstone application more secure, we are upgrading our HTML Sanitizer Library. This upgrade will have improved detection and sanitization of malicious code entered via HTML editors. We do not expect disruption to customers, but this might result in some subtle transformations in the underlying HTML/CSS that are functionally equivalent, yet not exactly what the user entered. For example, “background-color: red” will be standardized to “background-color: rgba(255, 0, 0, 1).”

With this enhancement, the following changes are implemented:

- Empty attributes are no longer stripped from tags.
  - For example, previously, “ ” would sanitize by stripping out the empty “style=”” attribute. With this enhancement, the empty value is preserved.
- Color names are replaced with rgba(,,,) notation. Functionally, there is no change, but the syntax is now different.
  - For example, “background-color: red” is now standardized to “background-color: rgba(255, 0, 0, 1).”
- Sanitized background tags are expanded to explicitly identify each background property. If XSS injection is attempted via utilizing one or more background style tags, the sanitized output will include all of the background style tags.
  - For example, “ " may be sanitized to “<div style=’background-position: initial; background-size: initial; background-repeat: initial; background-attachment: initial; background-origin: initial; background-clip: initial; background-color: initial’> .”
- Margin tags are expanded to explicitly identify each side when inside an @page css rule.
  - For example, “@page { margin: 2cm }” is expanded out to “@page { margin-top: 2cm margin-right: 2cm margin-bottom: 2cm margin-left: 2cm }.”
- Style tags are sanitized before empty attributes are stripped. Previously, Cornerstone would sanitize the entire style tag if any part needed to be sanitized. With this enhancement, Cornerstone only sanitizes the bad attributes.
  - For example, style="background: url(javascript:alert())" will be sanitized to the expanded background styles. Therefore, the style tag will not be empty and not removed. However, if the attribute style='background-color: invalidColor,' then this attribute would be stripped.

Implementation

This functionality is automatically enabled for all organizations.

Link Custom Skills to the Cornerstone Skills Graph

Link Custom Skills to the Cornerstone Skills Graph

Many organizations manage a mix of custom skills with existing Cornerstone skills. Previously, custom skills were not suggested to users because they were not part of the Cornerstone Skills Graph.

With this enhancement, when creating or editing a capability, administrators now have the option to link their custom skill to an equivalent Skills Graph skill, ensuring this skill will appear in suggestions and will feed learning recommendations.

How Does this Enhancement Benefit My Organization?

By linking custom skills to equivalent skills in the Cornerstone Skills Graph, users can see custom skills as part of their suggestions.

Considerations

- Only one Skills Graph skill can be linked to a custom skill, and a Cornerstone Skills Graph skill can only be “Equivalent” to a single custom skill.

Implementation

This functionality is automatically enabled for all organizations.

Upon release, existing custom skills are automatically linked to equivalent Cornerstone Skills Graph skills.

Edge Import Capability Library loads automatically match equivalent skills upon import. *See* **Edge Import - Capabilities Load Enhancement (Library Load)** on page 99 *for additional information.*

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

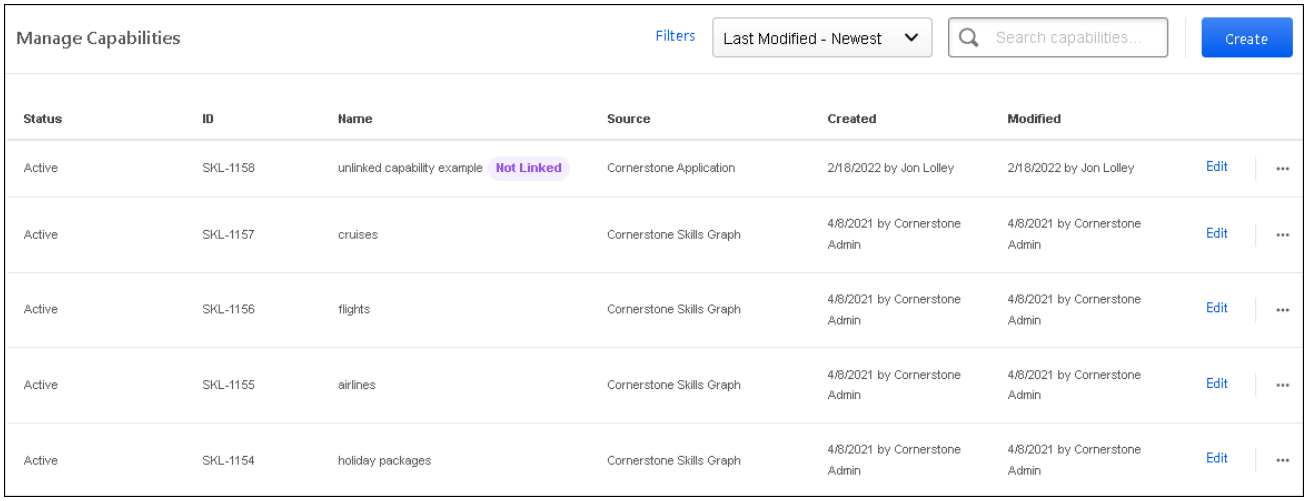
Manage Capabilities - Linked Skill

With this enhancement, if a custom skill is not linked to a skill in the Cornerstone Skills Graph, then a "Not Linked" tag is displayed next to the skill name on the Manage Capabilities page. Administrators can click the tag to edit the capability. This enables administrators to easily identify any unlinked skills and link them appropriately.

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants ability to 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



Create/Edit Capability - Linked Skill

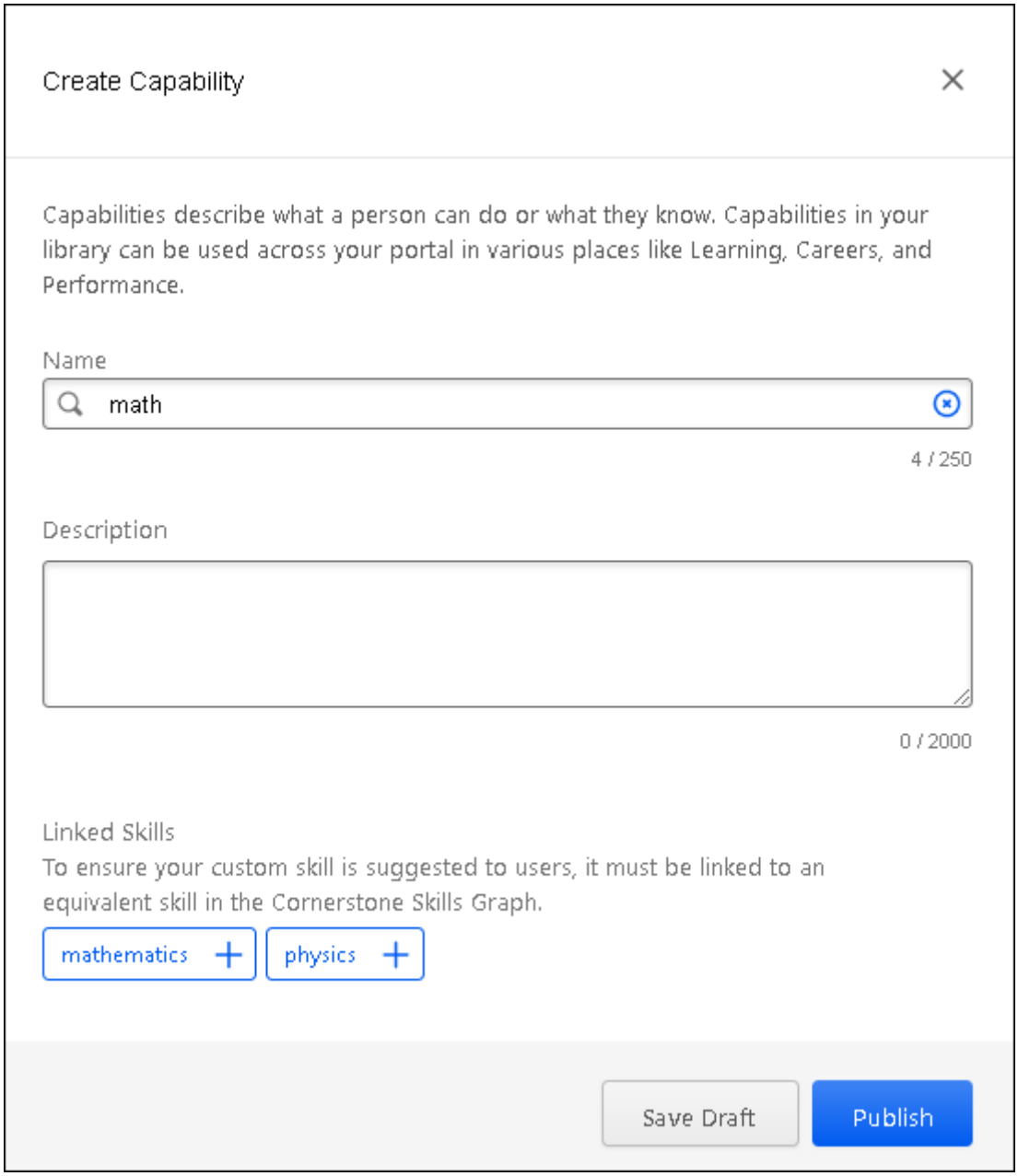
When creating a custom skill, administrators now have the option to link the custom skill to an equivalent skill in the Cornerstone Skills Graph. By linking the custom skill to a skill in the Cornerstone Skills Graph, this ensures the custom skill is suggested to users.

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

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capability Library - Edit	Grants ability to 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



Linked Skill

A new Linked Skill section is now available when creating or editing a custom skill.

This section enables administrators to link the custom skill to an equivalent skill in the Cornerstone Skills Graph, which helps ensure the custom skill is suggested to users. If a custom skill is not linked to a skill in the Cornerstone Skills Graph, the custom skill will not produce learning content recommendations and users will be required to search for the skill manually to be added to their profile.

If the administrator populates the **Name** field and does not select a suggested skill from the Cornerstone Skills Graph, a *Linked Skill* section is displayed. A list of suggested, similar skills is displayed in this section. ***Note:*** *When editing a custom skill, the administrator will*

not see skill suggestions if the skill name does not have a translation in the administrator's culture.

To link the custom skill to a skill from the Cornerstone Skills Graph, select one of the suggested skills in this section. The selected skill is displayed below the suggested skills. If the Cornerstone Skills Graph contains a skill with the exact same name, this skill is automatically selected, but it can be removed if necessary.

Only one skill from the Cornerstone Skills Graph can be linked to the custom skill.

When a custom skill is linked as an equivalent to a skill in the Cornerstone Skills Graph, the custom skill is shown in place of the equivalent Cornerstone skill anywhere skills are displayed to users, such as Skills You Want to Develop, Skills You Don't Want to Develop, Your Skills, Skills You Might Have, and Manage Skills. In addition, any ratings and feedback that a user has received for the custom skill are aggregated with any ratings and feedback received for the Cornerstone skill.

Edge Import - Linked Skill

When custom skills are imported using Edge Import, any custom skill that has a name that exactly matches or is a synonym of a skill in the Cornerstone Skills Graph, then these skills are automatically linked and set as equivalent.

Security Health Check

Security Health Check - Overview

Cornerstone deploys a number of security tactics following industry best practices to ensure customer portals are secure. Some security features embedded in the system have configurable security settings. Cornerstone maintains recommended values for all security settings.

While most portal's security settings are aligned to Cornerstone recommended values, regular review is encouraged to ensure those settings reflect an organization's current business needs and security best practices. Visibility into these settings helps customers to assess the potential impact to their organization's security and take action if necessary.

Security Health Check creates a joint responsibility model between Cornerstone and its customers, allowing customers to view and manage their portal's security settings. In the February '22 Release of Security Health Check, customers can review five security settings. Additional features may potentially be released throughout 2022.

With the February '22 Release of Security Health Check, the following functionality is available:

- View and select five security settings
  A. Prevent External URL Redirects
  B. Encrypt ViewState
  C. Strip unsupported HTML tags (Legacy Connect)
  D. SCORM CMI Data Encryption
  E. AICC Course Session ID Encryption
- Review setting descriptions, current portal values, and Cornerstone's recommended values
- See their portal's current security health status and easily identify critical security issues
- Open a case to resolve security issues directly from the Security Health Check interface

How Does this Enhancement Benefit My Organization?

This enhancement enables customers to view and manage their portal's security settings.

Frequently Asked Questions (FAQs)

What if I have no security issues?

That's great! Your security settings are set to Cornerstone's recommended values. No action for you at this time!

What is a security issue?

Cornerstone maintains recommended values for all security settings and encourages customers to review and update their portal's settings to align. A security issue is present when your portal's current security setting value does not align with Cornerstone's recommended value.

How do I resolve a security issue?

If a security issue is present, contact customer support. To create a support ticket (case) from the Security Health Check tool, click "Resolve" and "Create Support Ticket."

Do I need to contact my IT Security team if I have a security issue?

Yes, it is best practice to reach out to your IT Security team before requesting an update to any security settings.

Do I need to resolve my security issue?

Not always. For some organizations, a security setting has been intentionally set to a less secure value to support specific needs. Please consult your IT Security team before making any changes to your security settings.

Use Case

Alicia is a Cornerstone system administrator working with her IT Security department to review and sign off on application settings for an upcoming audit. Alicia accesses the Security Health Check tool, where she can easily identify the following:

- Cornerstone security settings relevant to customer system administrators
- Her organization's current security setting value compared to the Cornerstone recommended value
- Detailed descriptions of each security setting

Alicia notices that the value of one of her organization's settings is not aligned with Cornerstone's recommended value, and she wants to update to the most secure value ahead of the upcoming audit. From the Security Health Check tool, she can identify settings that require a ticket to Global Customer Support to update.

Implementation

This functionality is automatically enabled for all organizations.

Security Health Check is available in Core Functions. Access to this page is controlled by the new *Security Health Check - View* permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Health Check - View	Grants ability to view the Security Health Check tool. This permission cannot be constrained. This is an administrator permission.	Core Administration

Security Roles

Upon release, the new *Security Health Check - View* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

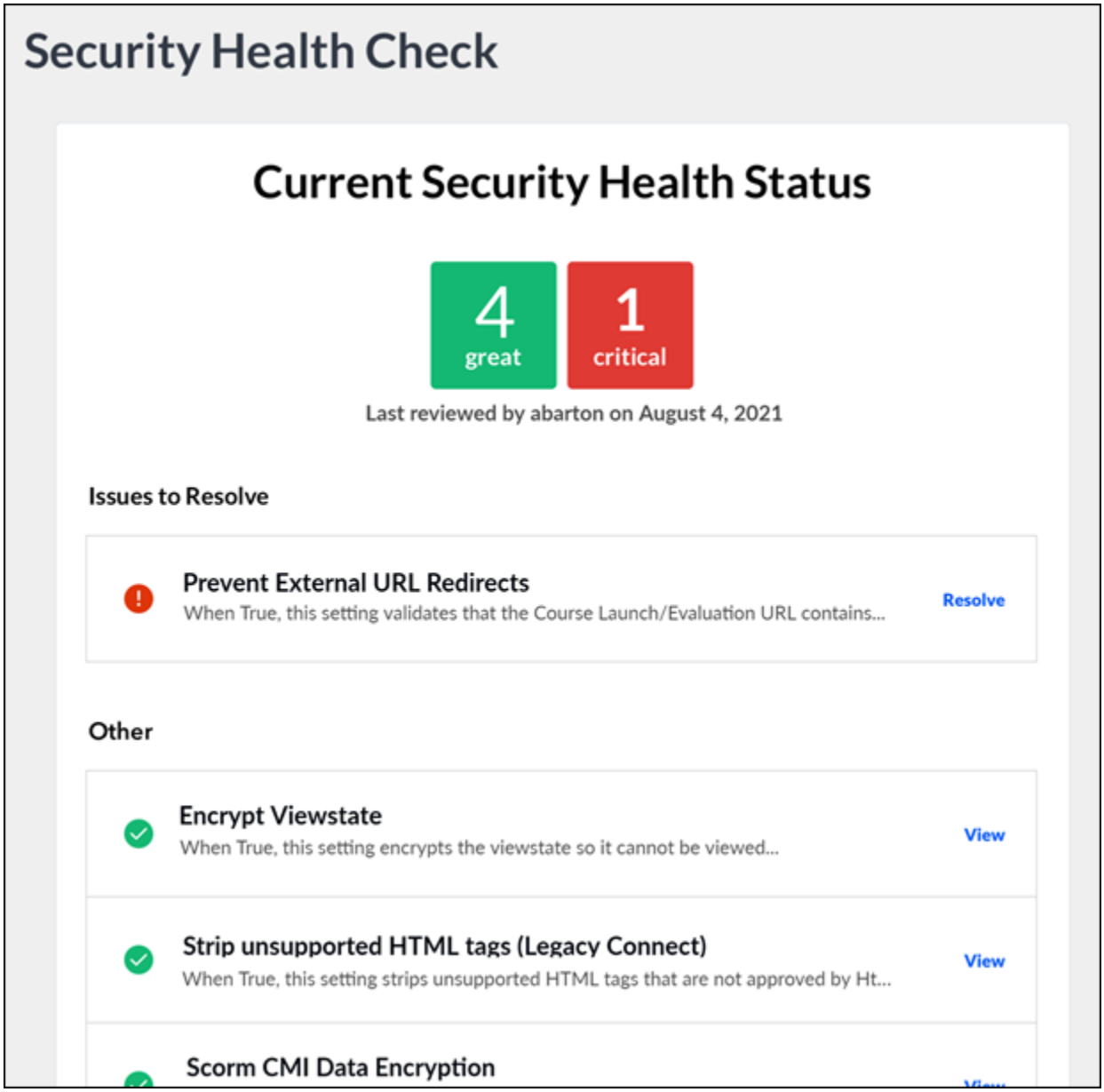
Security Health Check Tool

The Security Health Check tool enables customers to view and manage their portal's security settings.

To access the Security Health Check tool, go to ADMIN > TOOLS > CORE FUNCTIONS > SECURITY HEALTH CHECK.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Health Check - View	Grants ability to view the Security Health Check tool. This permission cannot be constrained. This is an administrator permission.	Core Administration



Current Security Health Status

This section displays the following information:

- Green Settings - This displays the number of settings that are currently aligned with Cornerstone's recommended settings.
- Red Settings - This displays the number of settings that are currently not aligned with Cornerstone's recommended settings.
- Last Security Check - This displays the date on which the security health check was last reviewed and by whom.

Issues to Resolve

This section displays details of each setting that is not currently aligned with Cornerstone's recommended settings.

Select the **Resolve** link to view additional details about the setting.

The Resolve Security Issue flyout also includes a **CREATE SUPPORT TICKET** button. Which clicked, this button opens Support Central where named administrators can open a support ticket. ***Note:*** *Only named administrators are able to create a support ticket.*

Other

This section displays details of each setting that is currently aligned with Cornerstone's recommended settings.

Select the **View** link to view additional details about the setting and its current configuration.

Available Settings

The following settings are currently available for review in the Security Health Check Tool:

- **Prevent External URL Redirects** - This setting only applies to Online Courses and Evaluations. When True, this setting validates that the Course Launch/Evaluation URL contains a redirect to a valid domain, such as CSOD or CyberU. If the URL is invalid, the user is redirected back to their previous page. It is recommended that the URL redirects are validated to prevent users from being redirected to an untrusted URL.
- **Encrypt ViewState** - When True, this setting encrypts the ViewState. The ViewState is a field used to save the current state of the application. It is recommended that ViewState is encrypted to maintain the confidentiality of the data and reduce the risk of information stored on the ViewState being compromised.
- **Strip unsupported HTML tags (Legacy Connect)** - This setting only applies to the following Legacy Connect pages: Post Details, Edit Post, and Old Connect Bio. When True, this setting removes unsupported HTML tags from Legacy Connect Post Details, Edit Post, and Old Connect Bio pages. Using unsupported HTML tags (i.e., those not approved by the HTMLStripper) can pose a security risk by allowing attackers to inject malicious code into Legacy Connect pages. It is recommended that only approved tags are used. The following tags are approved: Br; P; B; I; U; Ul; Ol; Li; S; Em; Strong; Div; Span; Tabe; Th; Td; Tr; Tbody; Tfoot; Thead; Blockquote; H1; H2; H3; H4; H5; H6; Img; Map; Area; A.
- **SCORM CMI Data Encryption** - This setting only applies to SCORM 1.2 and SCORM 2004 courses. When True, this setting encrypts SCORM CMI data transferred to the server. This includes learner information such as progress, interaction with the content object, success status, and complete status. It is recommended that SCORM CMI data is encrypted to improve data security and reduce the risk of data flowing between user and Cornerstone Learning Management System (LMS) from being compromised.
- **AICC Course Session ID Encryption** - This setting only applies to AICC and SCORM 1.2 courses. When True, this setting encrypts the session ID sent to AICC and SCORM 1.2 courses. It is recommended that session ID is encrypted to improve data security and reduce the risk of data flowing between user and Cornerstone Learning Management System (LMS) from being compromised.

Skill Feedback - Request Feedback About a Specific Person

Skill Feedback - Request Feedback About a Specific Person - Overview

With this enhancement, a new feedback template is now available that allows the ability to request others to provide feedback on specific people.

This feature is geared towards small groups of ten or less, such as a manager's direct reports. For example, managers can select members of their team as the target users, select a set of skills that are important to them, and then send a link to raters to provide candid feedback.

How Does this Enhancement Benefit My Organization?

The ability to request others to provide feedback on specific people helps organizations get a fuller picture around that person's skill proficiency.

Frequently Asked Questions (FAQs)

How do I grant this feature to my managers so they can request feedback on their direct reports?

Give your managers the *User Ratings - Feedback on specific person* permission constrained to "User's Direct Reports." Then, have your managers go to My Feedback Requests and create a new request using the Request 360 Feedback About a Specific User template.

As an administrator, can I use this feature to get feedback from a diverse group of people, not constrained to one specific team?

Yes, you can use the constraints on the permission to create the user pool from which you select the specific target users. You may use a similar method to grant this access to leaders who may also want to get feedback on a diverse decentralized group of target users.

Who can provide feedback, and do they need to rate this group of people at once?

Anyone with the request link can provide feedback. They do not need to complete all ratings at once. They can return to the request in multiple sessions, and their completion progress will be retained.

Implementation

This functionality is automatically enabled for all organizations.

The new "Request 360 feedback about a specific user" feedback template is automatically available for customization. Access to this template is controlled by the new *User Ratings - Feedback on specific person* permission. It is recommended to constrain this permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

User Ratings - Feedback on specific person	Grants ability to request 360 feedback about a specific user. This permission is intended for administrators, managers, or other leadership roles. This permission can be constrained to User, OU, User's OU, User Self and Subordinates and User's Direct Subordinates. It is recommended to constrain this permission. Managers should be constrained to "User's Direct Reports." Administrators can constrain themselves or others to a diverse pool of potential raters.	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 - Feedback on specific person* permission is automatically granted to the default System Administrator role. Administrators must grant this permission with the appropriate constraints to other roles, if necessary. It is recommended to constrain this permission.

Feedback Template - Request 360 Feedback About a Specific User

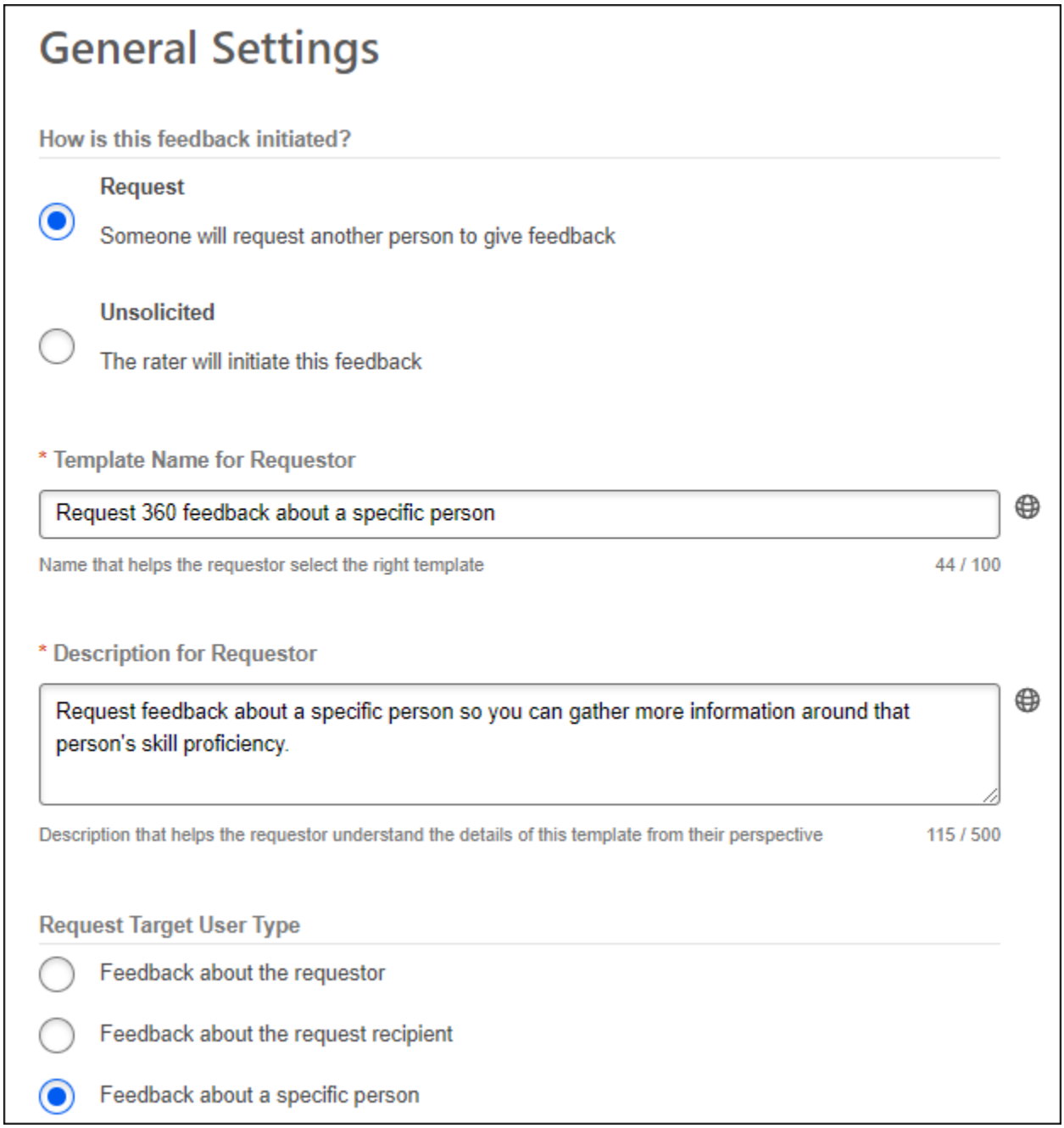
The "Request 360 Feedback About a Specific User" template enables administrators, managers, or other leadership roles to ask others to provide feedback about a specific user on a list of skills that they have chosen. The person who creates the request is able to select which skills are included in the request.

Users who have permission to request others to provide feedback on a specific user 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 - Feedback on specific person	Grants ability to request 360 feedback about a specific user. This permission is intended for administrators, managers, or other leadership roles. This permission can be constrained to User, OU, User's OU, User Self and Subordinates and User's Direct Subordinates. It is recommended to constrain this permission. Managers should be constrained to "User's Direct Reports." Administrators can constrain themselves or others to a diverse pool of potential raters.	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



General Settings

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

- How is this feedback initiated - Request
- Template Name for Requestor - Request 360 feedback about a specific user
- Description for Requestor - Request feedback about a specific person so you can gather more information around that person's skill proficiency.
- Request Target User Type - Feedback about a specific user

- Template Name for Rater - Please give this person a candid rating on their proficiency level, so they can identify what areas they need to work on. This rating will only be visible to you, the person who requested feedback, the person being rated, and their manager.
- Menu Action Name - Request 360 Feedback about a specific person.
- Rater Relation - Anyone (excluding self)
- Dimensions - Proficiency
- Default Visibility - Rater, Target User, Target User's Direct Manager, Requestor

Feature Connectors

On the *Feature Connectors* page, the Request Builder feature connector is available for the Request 360 Feedback About a Specific User template.

Request Feedback - Request Someone to Rate a Specific User

When requesting feedback, users who have permission to request others to provide feedback on a specific user will have additional options:

- **Who is this feedback about?** - This drop-down now contains a "Specific User" option which allows the requester to request feedback about a specific user who is within their permission constraints. This option is only available for users who have permission to request others to provide feedback on a specific person.
- **Select User** - When "Specific User" is selected from the **Who is this feedback about?** drop-down, the requester can select one or more users as the subject of the feedback request. The requester can only select users who are within their permission constraints.
- **Select a format** - When "Specific User" is selected from the **Who is this feedback about?** drop-down, this section only displays templates that are configured for requesting feedback for a specific person.

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 - Feedback on specific person	Grants ability to request 360 feedback about a specific user. This permission is intended for administrators, managers, or other leadership roles. This permission can be constrained to User, OU, User's OU, User Self and Subordinates and User's Direct Subordinates. It is recommended to constrain this permission. Managers should be constrained to "User's Direct Reports." Administrators can constrain themselves or others to a diverse pool of potential raters.	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

Create New Request

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?

Specific Person

Select a format

Request 360 feedback about a specific person

Request feedback about a specific person so you can gather more information around that person's skill proficiency.

Visibility: Rater, Target User, Target User's Direct Manager, You

Feedback Preferences

Select who this feedback is about

Search for specific person(s)

Select Skills

In an effort to promote engagement and responses, please limit selections to no more than 15 items.

Search for Skills

0 / 250

0 skills selected

* Create a Request Name

Create a Request Name

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

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

Submit

My Feedback Requests - 360 Feedback

With this enhancement, the My Feedback Requests page is updated to support the use of 360 feedback requests.

A new Target User column is added to clearly display who is the target of the feedback request. When the feedback is about a specific person, that person's name is displayed.

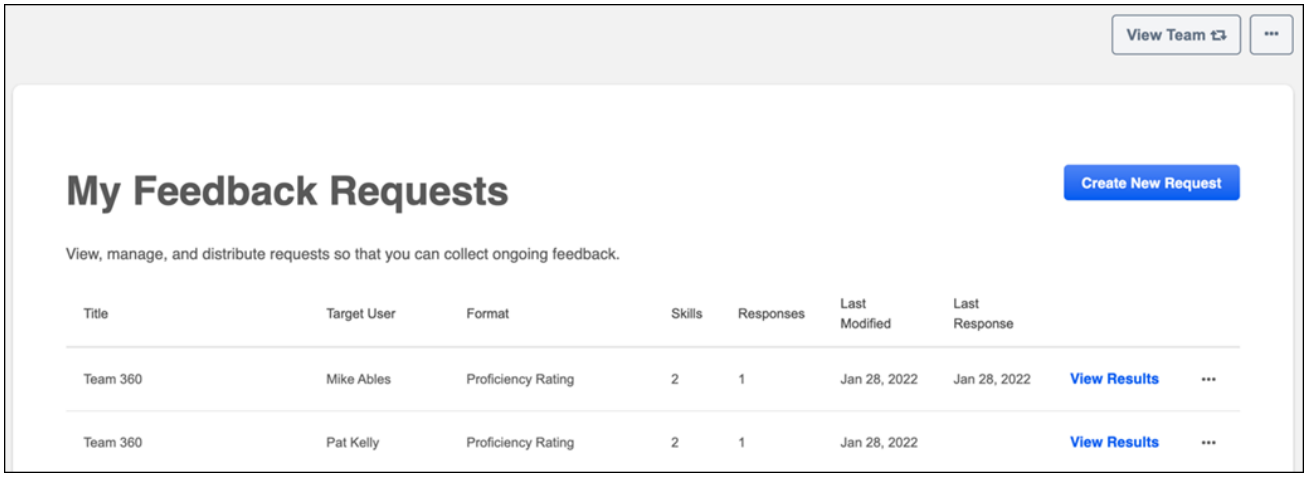
To view the My Feedback Requests page, go to HOME > UNIVERSAL PROFILE. Then, from the Skills menu, select **My Feedback Requests**.

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

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission. For Cornerstone Xplor, grants users the ability to view and manage their Skills Profile in Cornerstone Xplor. This permission is required to view and use Career Explorer functionality.	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


View Team
My Feedback Requests
Create New Request
View, manage, and distribute requests so that you can collect ongoing feedback.
Title
Target User
Format
Skills
Responses
Last Modified
Last Response
Team 360
Mike Ables
Proficiency Rating
2
1
Jan 28, 2022
Jan 28, 2022
View Results
Team 360
Pat Kelly
Proficiency Rating
2
1
Jan 28, 2022
View Results

Provide Feedback - 360 Feedback

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

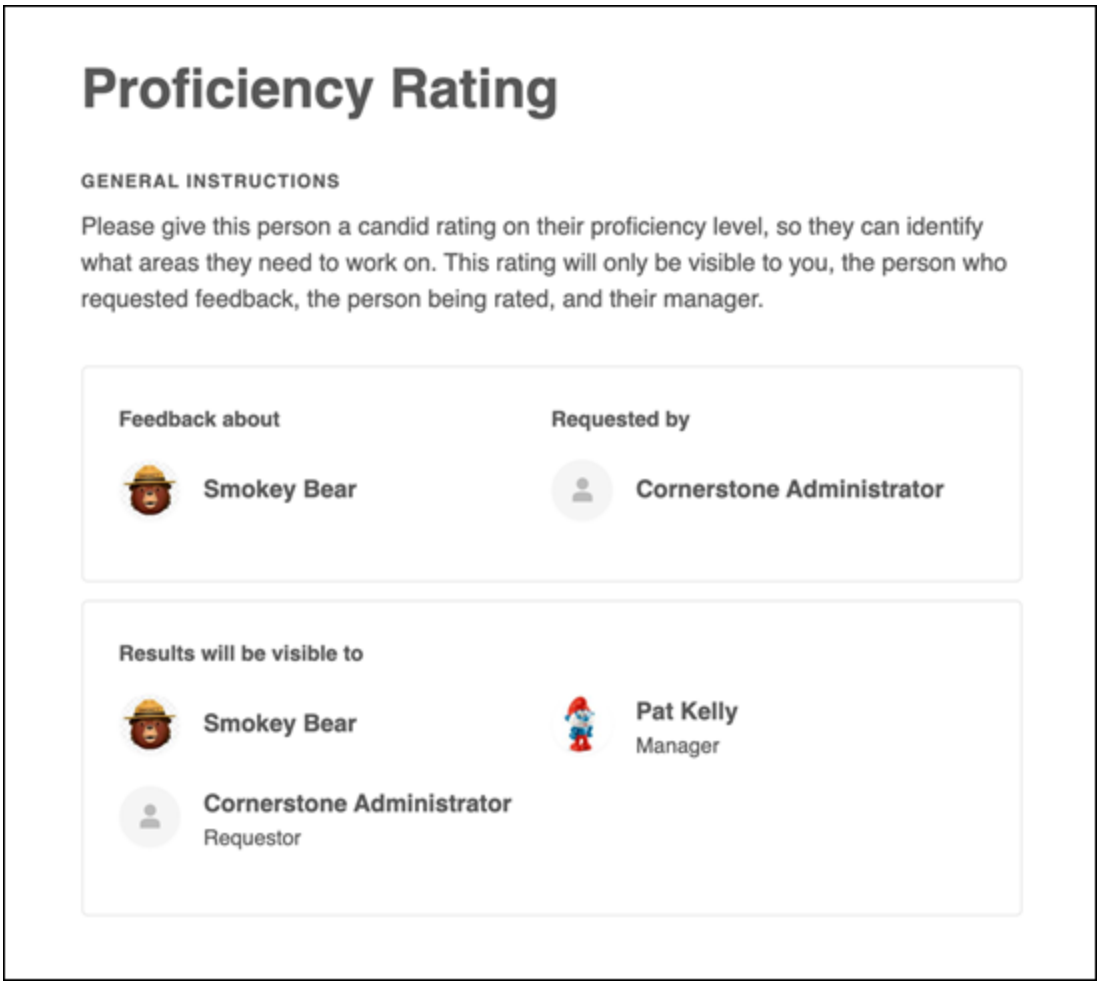
When the link is opened, general instructions are displayed, and the page clearly indicates who will be able to view the feedback that is provided.

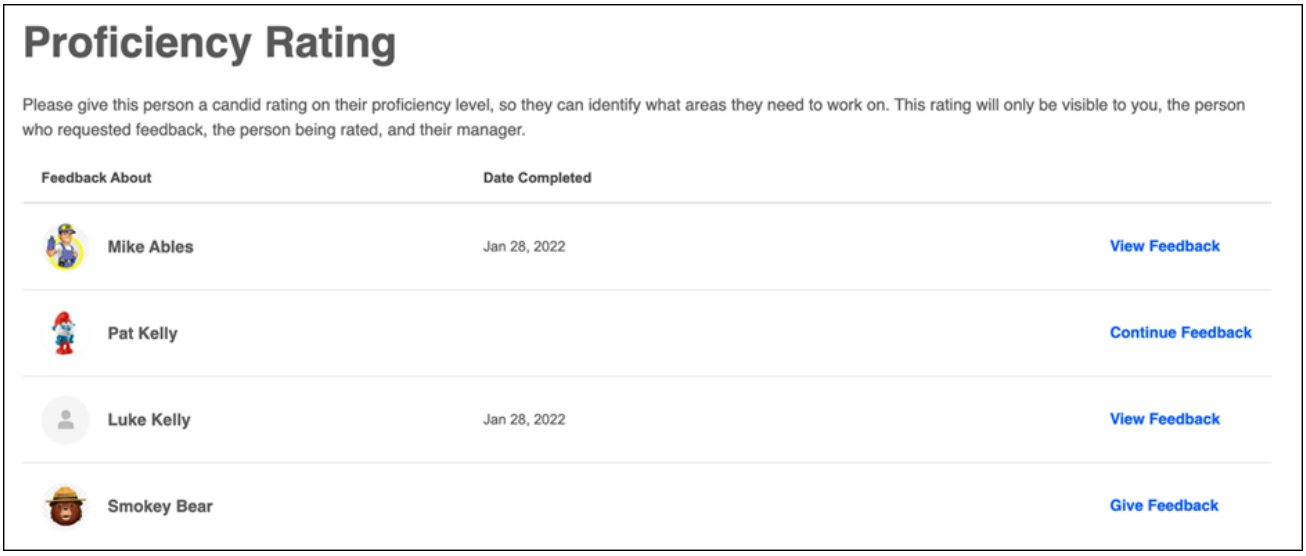
With this enhancement, when providing feedback in response to a feedback request, the person who requested the feedback is clearly displayed on the feedback form.

If you are giving feedback about multiple people in a single feedback request, then a list of the feedback assessees are displayed once the request is started. Assessors must select the **Give Feedback** link for each user to provide feedback for each individual in the request. After the assessor has provided feedback for someone in the request, the Date Completed column is populated, and the assessor can select the **View Feedback** link to review the feedback.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission. For Cornerstone Xplor, grants users the ability to view and manage their Skills Profile in Cornerstone Xplor. This permission is required to view and use Career Explorer functionality.	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


Proficiency Rating
GENERAL INSTRUCTIONS
Please give this person a candid rating on their proficiency level, so they can identify what areas they need to work on. This rating will only be visible to you, the person who requested feedback, the person being rated, and their manager.
Feedback about
Smokey Bear
Requested by
Cornerstone Administrator
Results will be visible to
Smokey Bear
Pat Kelly
Manager
Cornerstone Administrator
Requestor


Proficiency Rating
Please give this person a candid rating on their proficiency level, so they can identify what areas they need to work on. This rating will only be visible to you, the person who requested feedback, the person being rated, and their manager.
Feedback About
Date Completed
Mike Ables
Jan 28, 2022
View Feedback
Pat Kelly
Continue Feedback
Luke Kelly
Jan 28, 2022
View Feedback
Smokey Bear
Give Feedback

Skills Profile Enhancements

Skills Profile Enhancements - Overview

The Skills Profile is enhanced with the following features:

- Ability to hide the *Not Developing* section from both the Skills Profile and Skills Wizard.
- Skills are sorted alphabetically throughout the Skills Profile for all languages.

How Does this Enhancement Benefit My Organization?

Customer driven enhancements improve suggested skills and provide additional controls for administrators, resulting in a better experience for users when creating and maintaining their skills profile.

Implementation

This functionality is automatically enabled for all organizations.

A new toggle in the Skills Profile section of Capabilities Preferences controls the ability to hide the *Not Developing* section.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission. For Cornerstone Xplor, grants users the ability to view and manage their Skills Profile in Cornerstone Xplor. This permission is required to view and use Career Explorer functionality.	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

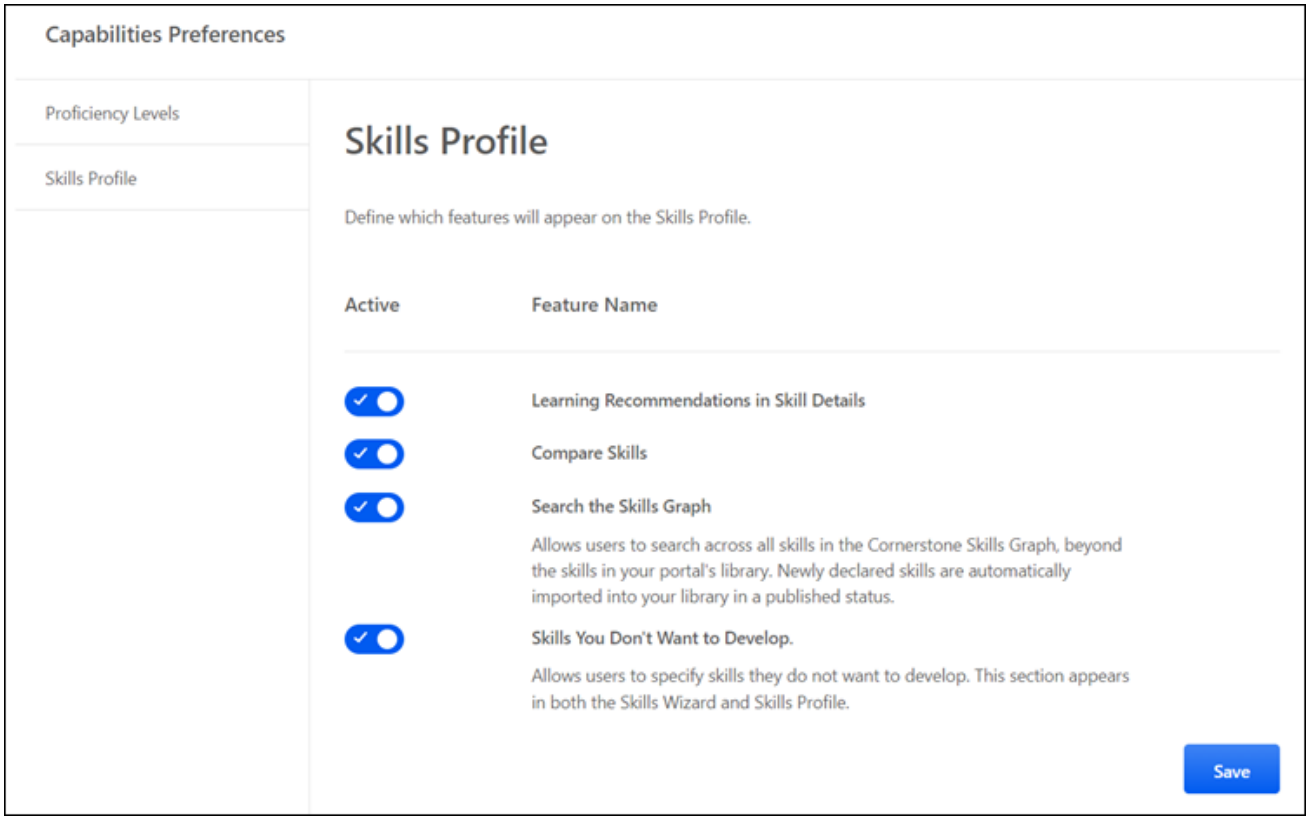
Capabilities Preferences - Hide Not Developing

With this enhancement, a new **Skills You Don't Want to Develop** setting is available in Capabilities Preferences. This enables organizations to hide the Not Developing section on the Skills Profile and when selecting skills in the Skills Wizard.

To access Capabilities Preferences, go to ADMIN > TOOLS > CORE FUNCTIONS > CAPABILITIES > PREFERENCES.

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



Total Endorsements

Total Endorsements - Overview

With this enhancement, it is possible to view a total endorsement count and view a detailed list of endorsements when viewing your own or another user's Skill Details.

The following functionality is included in this enhancement:

- View Total Endorsement Count on Skill Details flyout
- View detailed history of all Endorsements in the Feedback History modal
- Give a new endorsement from the Skill Details flyout

How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to easily view all endorsements, and the total endorsement count motivates both the person being endorsed and the endorser.

Considerations

- Currently, users are not able to undo or revoke endorsements or ratings they have given.

Implementation

This functionality is automatically enabled for all organizations using skill endorsements.

Skill endorsements are configured through Capabilities Administration, utilizing the existing Feedback Templates.

The ability to give new endorsements in various parts of the system may be toggled on or off through the Feature Connectors section for the Endorsement template.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission. For Cornerstone Xplor, grants users the ability to view and manage their Skills Profile in Cornerstone Xplor. This permission is required to view and use Career Explorer functionality.	Core Administration

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 Administratio n
User Ratings	For end users, this permission grants ability to perform ratings and view ratings. For administrators, this permission is required along with the specific user ratings administration permissions to edit rating scales or templates. This permission cannot be constrained. For Cornerstone Xplor, grants the ability to view, give, and receive skill feedback and ratings.	Core Administratio n

Total Endorsement Count on Skill Details

With this enhancement, the Skill Details flyout now shows endorsement information and actions for the skill.

When a user views the Skill Details flyout from their own Skills Profile, the user can view the number of endorsements they have received for the skill. Users can select the **endorsed by** link to view the Feedback History for the skill which includes all of the users who have endorsed the user for the skill. The endorsement count and list of endorsers are only displayed if the user has received at least one endorsement for the skill.

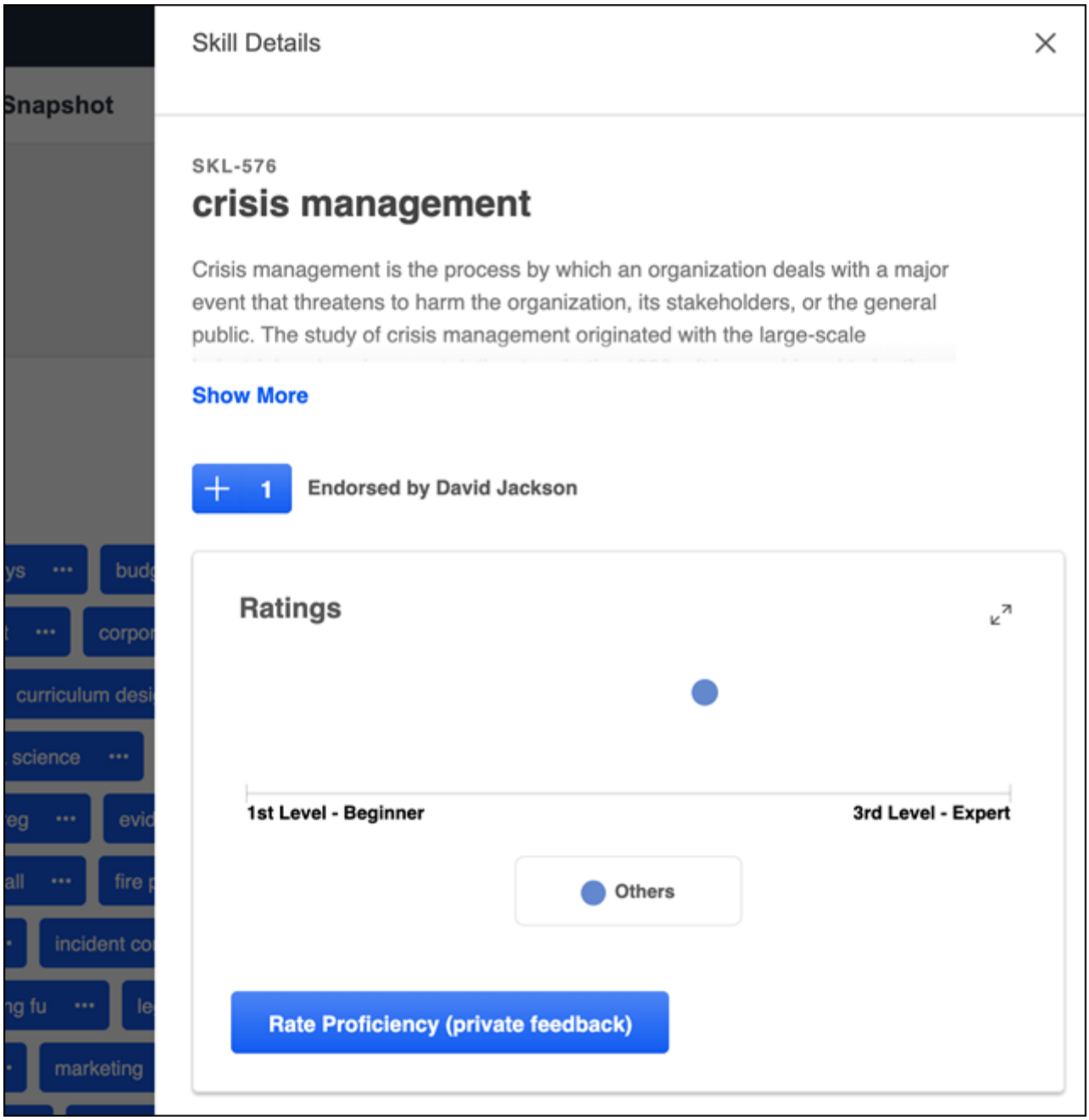
When a user views the Skill Details flyout from another person's Skills Profile, the user can view the number of endorsements the user has received for the skill. If the viewer has not yet endorsed the user for the skill, then they can select the **+** button to quickly add their endorsement.

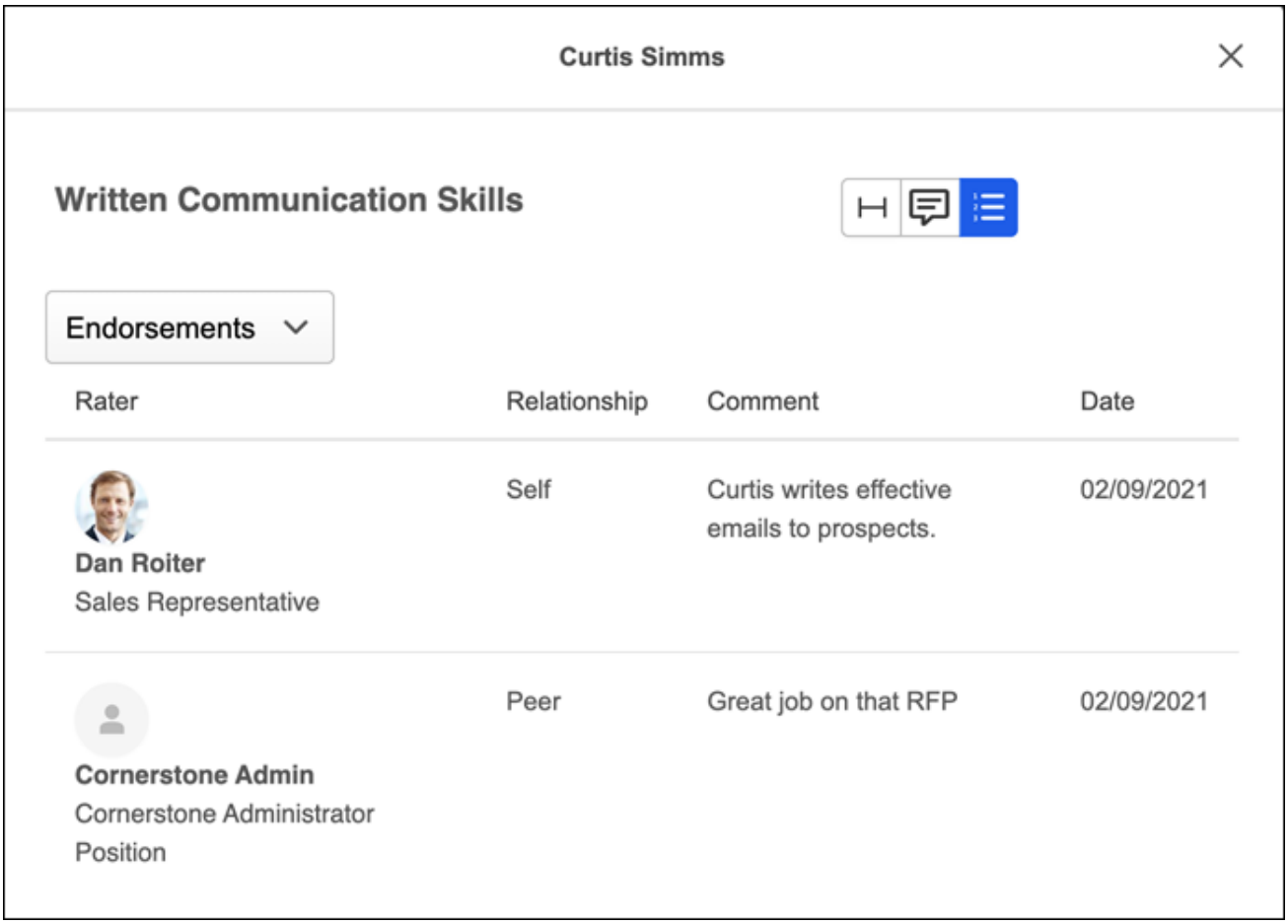
Note: *Currently, users are not able to undo or revoke endorsements or ratings they have given.*

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

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Capabilities - Skills Profile - View	Grants ability to view an employee Skills Profile. Users who have this permission may view the Skills Profile for anyone in the organization. However, individual ratings have privacy settings that control visibility within the Skills Profile. This permission cannot be constrained. This is an end user permission. For Cornerstone Xplor, grants users the ability to view and manage their Skills Profile in Cornerstone Xplor. This permission is required to view and use Career Explorer functionality.	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


Skill Details
Snapshot
SKL-576
crisis management
Crisis management is the process by which an organization deals with a major event that threatens to harm the organization, its stakeholders, or the general public. The study of crisis management originated with the large-scale
Show More
1
Endorsed by David Jackson
Ratings
1st Level - Beginner
3rd Level - Expert
Others
Rate Proficiency (private feedback)
curriculum desi
science
incident co
marketing


Curtis Simms
Written Communication Skills
Endorsements
Rater
Relationship
Comment
Date
Dan Roiter
Sales Representative
Self
Curtis writes effective emails to prospects.
02/09/2021
Cornerstone Admin
Cornerstone Administrator
Position
Peer
Great job on that RFP
02/09/2021

Edge Import Enhancements

Edge Import - Capabilities Load Enhancement (Library Load)

With this release, administrators can now link custom skills to skills in the Cornerstone Skills Graph. When importing capabilities using the Library load, Edge Import automatically links imported custom skills to equivalent Skills Graph skills based on title and synonym matching. This enhancement is related to Link Custom Skills to the Cornerstone Skills Graph, which is also new with the February ’22 Release. *See* **Link Custom Skills to the Cornerstone Skills Graph** on page 65 *for additional information.*

How Does this Enhancement Benefit My Organization?

This enhancement enables users to see custom skills as part of their suggestions.

Implementation

This functionality is automatically enabled for all organizations using the Capabilities data load in Edge Import.

There is no change to templates and nothing new to load. This change will happen automatically.

Permissions

The following existing permissions apply to this functionality:

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

Edge Import - Employee & OU Loads Enhancements

With this enhancement, additional functionality is now available when importing Employee and Organizational Unit (OU) data using Edge Import.

The following enhancements are available for all customers (Cornerstone HR and non-Cornerstone HR):

- Threshold Parameters for Auto-Inactivation of User Records - This functionality was released in the November 12 patch.
- Constraint validations - This functionality is not available at the start of UAT.

The following enhancements are available for customers using Cornerstone HR:

- Auto-Inactivation/Reconciliation - This functionality was released in the November 12 patch.

Threshold Parameters for Auto-Inactivation of User Records (All Customers)

When using Edge Import to update employee data, 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, customers can customize this threshold to a lower or higher maximum value. To modify this threshold, contact Global Customer Support.

This feature was released as part of the November 12, 2022 patch.

Constraint Validations (All Customers)

With this enhancement, organizations can now constrain an administrator's ability to load employee data via Edge Import. A new *Edge Import - Employee Load Constrained* permission is now available, and administrators can only load employee data if the employee is within the constraints on this permission.

This feature is not available at the start of UAT.

Auto-Inactivation/Reconciliation (Cornerstone HR Customers)

With this enhancement, Cornerstone HR customers now have the option to inactivate employees not present in the load file. This functionality was previously only available to non-Cornerstone HR customers.

When configuring the data load, an **Inactivate employees not present in the file?** setting is now available. If this setting is set to Yes, then any User IDs that exist in the Cornerstone system but are not present in the load file will be set to Inactive as long as the total number of records being inactivated are within the threshold parameters for auto-inactivation.

This feature was released as part of the November 12, 2022 patch.

How Does this Enhancement Benefit My Organization?

This enhancement provides increased functionality to support a wider range of customer's bulk upload needs. We are enhancing the Edge Import ecosystem to support additional efficiency and security requirements.

Implementation

This functionality is automatically available for organizations that currently use Edge Import to load employee and organizational unit data. Cornerstone HR customer portals are portals that utilize effective dating and advanced auditing.

The constraint validations enhancement introduces a dedicated *Edge Import - Employee Load Constrained* permission which can be used to limit administrators to execute loads only for specific areas within the organization.

At release, the Template Guide for this load will contain information to assist with load setup. Enhancements indicated as available now were delivered in the November 12 patch.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Edge Import - Employee Load Constrained	This permission enables organizations to constrain an administrator's ability to load employee data. Administrators can only load employee data if the employee is within the constraints on this permission. This permission can be constrained by OU. This is an administrator permission.	Edge Import

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access CHR - Employee Load	Grants access to the Cornerstone HR (CHR) employee data load via Edge Import. This permission and data load type are only available to organizations using CHR. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import

Access Edge Import Workflow - Cost Center	Grants access to the Cost Center organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Custom OU	Grants access to the Custom organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Division	Grants access to the Division organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Grade	Grants access to the Grade organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Group	Grants access to the Group organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Legal Entity	Grants access to the Legal Entity organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Location	Grants access to the Location organizational unit data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access Edge Import Workflow - Position	Grants access to the Position organizational unit data load via Edge Import. 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 Administratio n
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	Core Administratio n

	OU and User's OU. This is an administrator permission.	

Security Roles

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

Edge Import - Learning Load Enhancement (External Training Load)

With this enhancement, the External Training load in Edge Import is enhanced to support common external training update use cases.

The following enhancements have been added:

- The Start Date is no longer required when updating external training. This enables organizations to update external training without knowing the exact start date. The Start Date value is only required when creating new external training via Edge Import.
- The following new optional fields are now available for import:
  - Request Date/Time - This defaults to the Start Date or the import date and time in UTC.
  - Registration Date/Time - This defaults to the Start Date or the import date and time in UTC.
  - Completion Date/Time - This defaults to the End Date or the import date and time in UTC.

Considerations

- Start Date is no longer required when updating external training.
- For existing configurations, the new fields are visible, but they are not mapped.
- In order to import data into the new, optional fields, organizations must create a new configuration that includes mappings for these fields.
- In order to use the new, optional fields in a data feed, organizations must create a new configuration that includes mappings for these fields and modify the feed setting to include this new configuration.
- For organizations that do not want to import data into the new, optional fields, no action is necessary for existing feeds or configuration files.

Implementation

This functionality is automatically enabled for all organizations using Edge Import. The template Guide in Edge Import will be updated to reflect these enhancements.

Customers who have not purchased Edge Import can initiate the purchase of Edge Import from the “Edge Import” tile in Edge Marketplace.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Access LMS - External Training Load	Grants access to the External Training data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - Learning Load Enhancement (Online Course Transcript Load)

Prior to this enhancement, Edge Import could not be used to import a “Failed” transcript status for an online course.

With this enhancement, transcript statuses for online courses can be updated in the following ways:

- From Approved to Failed
- From Failed to Failed, Completed
- From Registered to Failed

How Does this Enhancement Benefit My Organization?

This enhancement reduces work order requests to change Online Course transcript statuses to “Failed.”

Considerations

With this enhancement, transcript statuses for online courses cannot be updated from Completed to Failed.

Implementation

This functionality is automatically enabled for all organizations using Edge Import. The template guide in Edge Import will be updated to reflect this enhancement.

Customers who have not purchased Edge Import can initiate the purchase of Edge Import from the “Edge Import” tile in Edge Marketplace.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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 (Transcript Loads)

Prior to this enhancement, when loading transcript data, the completion date had to be greater than or equal to the request or registration date.

With this enhancement, it is now possible to load training in a completed status in which the completion date is not greater than or equal to the request or registration date.

This applies to the following load types:

- Curriculum Transcript
- Material Transcript
- Online Course Transcript
- Test Transcript
- Video Transcript

How Does this Enhancement Benefit My Organization?

This enhancement reduces work orders and supports a common use case when uploading training that is equivalent to another prior completed training.

Implementation

This functionality is automatically enabled for all organizations using Edge Import. Template guides in Edge Import will be updated to reflect this enhancement.

Customers who have not purchased Edge Import can initiate the purchase of Edge Import from the “Edge Import” tile in Edge Marketplace.

Permissions

The following existing permissions apply to this functionality:

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

Access LMS - Test Transcripts Load	Grants access to the Test Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - Video Transcripts Load	Grants access to the Video Transcripts data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Edge Import - Localize in all Left to Right Languages

Prior to this enhancement, Edge Import was available in English and a few other languages.

With this enhancement, the Edge Import framework is fully localized to support all languages that read from left to right.

How Does this Enhancement Benefit My Organization?

This enhancement provides support for additional languages.

Considerations

Languages that read from right to left are not in scope for this enhancement.

Implementation

This functionality is automatically enabled for all organizations using Edge Import and have left to right language packs installed in their portal.

Customers who have not purchased Edge Import can initiate the purchase of Edge Import from the “Edge Import” tile in Edge Marketplace.

Edge Import - New Learning Load Type (LO Availability) and Changes to Availability Criteria for Training Loads

Training can have multiple availability criteria. Prior to the new LO (Learning Object) Availability load type, the previous experience required separate loads based on training type, and some previously existing availability settings would get removed unintentionally if they were not included in the current load. Updates to ILT Event and Session availability were also not supported using Edge Import.

With this enhancement, a new LO (Learning Object) Availability Load Type is now available.

With the new LO Availability load, it is possible to add, update, and remove availability criteria for training in one load, even when there are multiple availability criteria for a single training or multiple training types included in the file.

This load type supports the following training types:

- Curriculum
- ILT Events
- ILT Sessions
- Material
- Online Content
- Online Course
- Test
- Video

Impact to Existing Training Load Types and Saved Template Configurations

With the introduction of the new LO Availability load, the following fields are removed from the templates for the supported training types, and these fields are only available in the LO Availability Load. These fields are removed from template guides and when creating new configurations.

- Availability Type: Users
- Availability Type: OU
- Availability OU Type fields

Existing saved configurations where the above three availability related fields are mapped will lose the mapping and no longer see these fields for future mapping and import. In this case, the saved configurations that contain the availability fields must be recreated without the availability fields. Import files for training loads that use these three availability fields will not be mapped or imported.

For the training loads for the training types supported by the new LO Availability load, they will now only have the following availability related criteria:

- Availability: All Users - When this is set to true, it overrides all other availability settings for the learning object.

- Register Upon Approval
- Pre-approved
- Include Subordinates

How Does this Enhancement Benefit My Organization?

This enhancement enables organizations to easily update training availability in bulk using one load type for multiple types of training, including events and sessions.

Considerations

- Feeds and Bulk API import methods are not supported for the new LO Availability load type.

Implementation

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

Access to this load is controlled by the new *Access LMS - LO Availability Load* permission.

The template guide in Edge Import will contain additional information for this new load type.

Customers who have not purchased Edge Import can initiate purchase of Edge Import from the “Edge Import” tile in Edge Marketplace.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access LMS - LO Availability Load	Grants access to the LO (Learning Object) Availability data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, the new *Access LMS - LO Availability Load* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Edge Import - New Learning Load Types (Online Content)

Online Content training is created directly via content provider integrations, such as the Coursera and Percipio integrations available in Edge Marketplace.

Prior to these new Online Content load types, customers did not have a self-service option to update Online Content metadata or capture external registrations and completions in bulk.

With this enhancement, new learning load types are available for Online Content within Edge Import.

The following new load types are now available:

- Online Content Transcript Custom Field Load - Use this load type to import custom field values for online content transcripts.
- Online Content Transcript Load - Use this load type to capture registrations and completions for launches from external systems when learners are not registered for the courses in their Cornerstone portal.
- Online Content Metadata Load - Use this load type to update metadata for Online Content that currently exists in a portal's course catalog.

Considerations

- Future dated registrations are not supported. The Learning Assignment Tool should be used for this purpose.
- Feeds and Bulk API import methods are not supported.

Implementation

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

Access to these loads is controlled by the new *Access LMS - OLCO Metadata Load* and *Access LMS - OLCO Transcript Load* permissions.

The template guides in Edge Import will contain additional information for these new load types.

These new loads will be available in English at the start of UAT. Other languages translations are targeted to be available with the February 8 stage deployment.

Customers who have not purchased Edge Import can initiate purchase of Edge Import from the "Edge Import" tile in Edge Marketplace.

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Access LMS - OLCO Metadata Load	Grants access to the Online Content Metadata data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import
Access LMS - OLCO Transcript Load	Grants access to the Online Content Transcript and Online Content Transcript Custom Field data load via Edge Import. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, if Edge Import is enabled, the new *Access LMS - OLCO Metadata Load* and *Access LMS - OLCO Transcript Load* permissions are automatically granted to the default System Administrator role. Administrators must grant these permissions, if necessary.

Edge Import - New Organizational Unit Load Type (Group)

This enhancement is not being released with the February '22 Release. Instead, it will be part of a future package including Group data loads and Group Membership data loads.

Edge Import - New Performance Load Type (Goals)

Goals allow users and managers to set action-oriented tasks and track results.

Prior to this enhancement, bulk uploading of goals was not self-service; this required a project with Cornerstone support.

With this enhancement, a new Edge Import load type is available, which allows customers to create user goals with no tasks or targets.

The new Goals load type supports the following fields:

- User ID
- Goal ID
- Goal Title
- Goal Description
- Goal Start Date
- Goal End Date
- Goal % Completion
- Goal Weight
- Perspective
- Category
- Allow Subordinates to Align

How Does this Enhancement Benefit My Organization?

The new User Goal Load enables organizations to load goals in bulk in a self-service manner.

Considerations

- Goal ID values in the load file must be unique for each record.
- Organizations cannot include tasks or targets with a goal via the User Goal Load.
- A goal may only have a single perspective associated with it.
- Depending on a portal's configuration, the total weight of all goals for a user may be required to be less than or equal to 100%.
- The Edge Import User Goal Load will override the portal setting that restricts the number of goals assigned to a user.
- Edge Import cannot be used to cancel goals. This can only be done within the Cornerstone system.
- Feeds are not supported.

Implementation

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

Access to this load is controlled by the new *Edge Import - User Goal Load* permission.

The template guides in Edge Import will contain additional information for this new load type.

Customers who have not purchased Edge Import can initiate purchase of Edge Import from the “Edge Import” tile in Edge Marketplace.

Permissions

The following new permission applies to this functionality:

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

Security Roles

Upon release, the new *Edge Import - User Goal Load* permission is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Edge Import - Restrict Download Report

Prior to this enhancement, when a user had permission to perform a load, this user could download the import results report for a load performed by themselves and anyone else who had performed this load.

With this enhancement, a new optional feature is available to limit users to download import result reports for loads only performed by them.

How Does this Enhancement Benefit My Organization?

This enhancement provides the ability to restrict users from downloading reports for loads they did not perform themselves. This new feature brings Edge Import to parity with a current Data Load Wizard (DLW) feature in use today.

Use Cases

A bank has two regional office locations, and each location has a dedicated Edge Import administrator, Jack and Jill, responsible for keeping data between their regional HRIS and Cornerstone systems up to date. Each Edge Import administrator has a separate HRIS system. The organization wants to restrict these administrators so that an administrator can only download and view data for loads that they performed.

The organization contacts Global Customer Support and enables this feature. Both Jack and Jill have access to perform an Employee data load. Jill is granted the new permission, but Jack is not.

When Jack, who does not have the new permission, logs in to the system, the following occurs:

- He can download reports for loads and feeds that he performed.
- He cannot download reports for loads and feeds performed by Jill.
- He cannot download reports for loads performed via feed by scheduled feed runs.
- He cannot perform a data load for Jill who has previously only validated their data.

When Jill, who does have the new permission, logs in to the system, the following occurs:

- She can download reports for loads and feeds that she performed.
- She can download reports for loads and feeds performed by Jack.
- She can download reports for loads performed via feed by scheduled feed runs.
- She can perform a data load for Jack who has previously only validated their data.

Bulk API

When this enhancement is enabled, the following end points for the Bulk API are impacted, and they now observe the new permission:

- Get reports
- Get import errors
- Get import warnings

Implementation

The availability of this functionality is controlled by a backend setting, which is disabled by default. To enable this functionality, contact Global Customer Support.

Once this functionality is enabled, the new *Download Reports Access when portal opts-in for Restrict reports access - Edge Import* permission is also enabled, and this permission is required to download import results reports for loads performed by others.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Download Reports Access when portal opts-in for Restrict reports access - Edge Import	Grants ability to download Edge Import load details reports for loads performed by others. Users who do not have this permission cannot download load import results for loads performed by others. In addition, users without this permission cannot load data for someone who has previously only validated their data. This permission cannot be constrained. This is an administrator permission. This permission is only available and applicable when the portal has enabled the restriction for Edge Import load details report access.	Edge

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Import	Grants access to the Edge Import tool, which enables administrators to load data into their portal. This permission cannot be constrained. This is an administrator permission.	Edge Import

Security Roles

Upon release, the new *Download Reports Access when portal opts-in for Restrict reports access - Edge Import* permission is disabled. This permission is only available when the portal has enabled the restriction for Edge Import load details report access. When the permission is enabled, it is automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Integrations & APIs

Bulk API - Support Learning Loads

With this enhancement, the Bulk API now supports learning data loads.

The Bulk API now supports the following load types:

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

How Does this Enhancement Benefit My Organization?

This enhancement enables organizations to use API calls as an alternative to Edge Import to bulk import training and transcript data.

Implementation

This functionality is included in the Bulk API functionality, and it is automatically enabled for organizations using the Bulk API that is available in Edge Marketplace.

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

Organizations wanting to use the Bulk API in Production must submit a purchase inquiry via the Edge Marketplace.

API Explorer contains the most up-to-date documentation for all REST APIs. API Explorer enables developers and partners to easily browse all available REST APIs. Developers can learn about supported features, methods, and metadata. Developers can also download guidelines and access links to sample code.

To access the API Explorer, go to ADMIN > TOOLS > EDGE > API EXPLORER. API Explorer can also be accessed directly at the following URL: **http://apiexplorer.csod.com**

Information about the Bulk API can be found here: **https://apiexplorer.csod.com/apiconnectorweb/apiexplorer#/bulkapi/specification**

Permissions

The following new permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Bulk API - LMS - Curriculum Transcripts	Grants ability to use the Bulk API to load curriculum transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Curriculum	Grants ability to use the Bulk API to load curriculum learning object and structure data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Events	Grants ability to use the Bulk API to load event learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import

Access Bulk API - LMS - External Training Transcripts	Grants ability to use the Bulk API to load external training transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - ILT Transcripts	Grants ability to use the Bulk API to load instructor-led training (ILT) transcript data, session transcript custom fields data, and event transcript custom fields data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Material Transcripts	Grants ability to use the Bulk API to load material transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Material	Grants ability to use the Bulk API to load material learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Online Course	Grants ability to use the Bulk API to load online course learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Online Transcripts	Grants ability to use the Bulk API to load online transcripts data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import

Access Bulk API - LMS - Session Parts	Grants ability to use the Bulk API to load session parts data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Sessions	Grants ability to use the Bulk API to load event session data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Test Mapping	Grants ability to use the Bulk API to load test mapping data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Test Transcripts	Grants ability to use the Bulk API to load test transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Test	Grants ability to use the Bulk API to load test learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import
Access Bulk API - LMS - Video Transcripts	Grants ability to use the Bulk API to load video transcript data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import

Access Bulk API - LMS - Video	Grants ability to use the Bulk API to load video learning object data. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge Import

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Access Edge Bulk API History	Grants access to the Bulk API History page, which displays all the loads that have been performed using the Bulk API. Administrators can select a load to view additional details of the load, including the results. This permission cannot be constrained. This is an administrator permission.	Edge
Access Edge Bulk API	Grants ability to access and utilize the Bulk API. This permission cannot be constrained. This is an administrator permission. This permission is only available when the Bulk API is enabled via Edge Marketplace.	Edge

Security Roles

Upon release, the new Bulk API - LMS permissions are automatically granted to the default System Administrator role. Administrators must grant this permission to other roles, if necessary.

Enhancement to Employee API v2 Constraints

This enhancement provides an additional configuration option for the existing *Employee API - View - Constrained* permission. Customers can now include user-specific restrictions as part of the constraint definition. This is in addition to the organizational unit-based criteria that was previously delivered with the October ‘21 release.

Considerations

Employee API v1 is not impacted by this enhancement.

Implementation

This functionality is automatically enabled for all organizations using the Employee API v2.

Additional documentation is available in the **API Explorer** upon release.

Permissions

The following existing 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 User, 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. This permission is only available when the Employee API v2 is enabled via Edge Marketplace.	Edge

Reporting Enhancements

Custom Reports – Limit How Long Snapshots Are Stored

Prior to this release, Custom Report snapshots were saved for an unlimited amount of time, impacting storage space and performance.

With this release, to save storage space and ensure steady performance, Custom Report snapshots are stored for a maximum of one year.

The Custom Report snapshot pop-up will continue to show the date and time for the past three instances of the report and the number of records returned in the report if the last three instances are within the one-year time frame.

Considerations

- Custom Report snapshots older than one year will not be accessible after this release.
- This time-limit applies to existing and new snapshots.
- If there are existing, important snapshots older than one year, download them before the February 25, 2022 release date.

Implementation

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

Click here to download the Custom Reports - Deprecation Guide.

Deprecation of Custom Reports to Begin in August 2022

The deprecation of Custom Reports is targeted to start with phase 1 occurring in the August ’22 Release. This target date gives customers time to prepare and to complete their migration to Reporting 2.0. In the meantime, Cornerstone will also continue to further enhance Reporting 2.0.

Our top priority is performance and stability. Cornerstone implemented several improvements during 2021 and will continue to monitor and make improvements during 2022.

- Cornerstone will continue closing the remaining parity gaps between Reporting 2.0 and Custom Reports.
- Customers have shared feedback regarding the current Reporting 2.0 permission model and many requests have been received for a simpler option. To meet this demand, Cornerstone is working on an alternative Report Level Permission Model. Details on this future permission model will be shared in a future release.

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.

Deprecation Phases

Phase 1 - August '22 Release (5 August - Q3):

1. Remove "create" permission, customers can no longer create new Custom Reports.
2. Remove “edit” permission, customers can no longer edit existing Custom Reports.
3. Remove options for customers to add new deliveries (scheduled, FTP, email, etc.)
4. Continue support for running existing Custom Reports, including existing scheduled reports.
5. Continue to support migration.

Phase 2 - October '22 Release (4 November - Q4):

1. Stop all Custom Report deliveries (scheduled, FTP, email, etc.)
2. Ad-hoc run of Custom Reports remains possible.
3. Continue to support migration.

Phase 3 - February '23 Release (February - Q1 2023):

1. Remove all remaining access for Custom Reports.
2. Customers can no longer use or migrate Custom Reports at all.

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 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. As of the October ’21 Release, defects for these report formats that are not P1 are not being fixed. Customers exporting or downloading their Reporting 2.0 reports in Word 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.

New Standard Report - Groups Criteria Report

Customers have frequently requested the ability to report on the criteria defined for the groups in their portal.

Prior to this enhancement, the only way to gather this data was by submitting a case to customer support or to validate each group manually.

With this enhancement, a new Groups Criteria Report is available in all portals as a standard report so that customers can quickly retrieve the criteria defined for one or more groups in their portal whenever the need arises.

This report supports 100,000 rows of data.

Note: *Groups that do not have any criteria are not included in this report.*

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

Report Details

The following report filters are available:

FILTER NAME	DESCRIPTION
Organizational Unit	Select one or more groups to include in the report. ***Note:*** *Groups that do not have any criteria are not included in this report.*
Creation Date	Select a date range for the report. The report will only include groups that were created within the selected date range. Date values are set in the time zone of the user running the report. When set, this filter works in conjunction with the Modification Date filter.
Modification Date	Select a date range for the report. The report will only include groups that were modified within the selected date range. Date values are set in the time zone of the user running the report. When set, this filter works in conjunction with the Creation Date filter.
Group Status	Select this option to include inactive groups in the report output.
Group Owner User ID	Provide a user ID to only include groups that are owned by the corresponding user.

The following details are included in the report output:

COLUMN NAME	DESCRIPTION
Group ID	This displays the ID of the group.
Group Name	This displays the name of the group.
Group Status	This displays the active status of the group.

COLUMN NAME	DESCRIPTION
Group Parent ID	This displays the ID of the parent group.
Group Parent Name	This displays the name of the parent group
Group Parent Status	This displays the active status of the parent group.
Group Description	This displays the description set for the group.
Group Criteria Type	This displays the type of criteria that was set for the group (e.g., User, Standard Field, Custom Field, etc.).
Group Creator ID	This displays the ID of the user who created the group.
Group Creator Username	This displays the Username of the user who created the group.
Group Creator User Full Name	This displays the full name of the user who created the group.
Group Creation Date	This displays the date on which the group was created. Date fields are displayed in the time zone of the user running the report.
Group Owner User ID	This displays the ID of the user who is set as the group owner.
Group Owner Username	This displays the Username of the user who is set as the group owner.
Group Owner User Full Name	This displays the full name of the user who is set as the group owner.
Group Last Modification Date	This displays the date on which the group was last modified. Date fields are displayed in the time zone of the user running the report.
Group Last Modified by User ID	This displays the ID of the user who last modified the group.
Group Last Modified by Username	This displays the Username of the user who last modified the group.

COLUMN NAME	DESCRIPTION
Group Last Modified by User Full Name	This displays the full name of the user who last modified the group.
Freeze Group Processing	This displays whether the "Freeze Group Processing" option is enabled for the group. When this option is enabled for a group, the system does not add or remove any users based on the group criteria.
Operator	This displays the operator associated with the group criteria, such as "Is or Below" or "Includes any of."
OU Title	If the Group Criteria Type is set to an organizational unit, then this displays the title of the organizational unit used in the criterion. Otherwise, this field is blank.
OU ID	If the Group Criteria Type is set to an organizational unit, then this displays the ID of the organizational unit used in the criterion. Otherwise, this field is blank.
OU Status	If the Group Criteria Type is set to an organizational unit, then this displays the status of the organizational unit used in the criterion. Otherwise, this field is blank.
OU Type	If the Group Criteria Type is set to an organizational unit, then this displays the type of the organizational unit used in the criterion. Otherwise, this field is blank.
User ID	If the Group Criteria Type is set to a user, then this displays the ID of the user used in the criterion. Otherwise, this field is blank.
Username	If the Group Criteria Type is set to a user, then this displays the Username of the user used in the criterion. Otherwise, this field is blank.
User Full Name	If the Group Criteria Type is set to a user, then this displays the full name of the user used in the criterion. Otherwise, this field is blank.
User Status	If the Group Criteria Type is set to a user, then this displays the status of the user used in the criterion. Otherwise, this field is blank.
Other Group Criteria	If the Group Criteria Type is set to something other than an organizational unit or a user, then this displays the details of the criterion. Otherwise, this field is blank. Entries in this field will be pipe delimited.

How Does this Enhancement Benefit My Organization?

This standard report provides the criteria defined for groups.

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 *Groups Criteria Report* permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Groups Criteria Report	Grants access to the Group Criteria Report, which enables organizations to retrieve the criteria defined for one or more groups in their portal. This permission cannot be constrained.	Reports - System

Security Roles

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

New Standard Report - Security Role - Audit Report

Customers often need to audit their security roles. They need to understand which users have been assigned to which security roles and the security role modification history.

Prior to this enhancement, the only way report on this data was by submitting a case to customer support, and these requests were often time sensitive.

With this enhancement, a new Security Role - Audit Report is available in all portals as a standard report so that customers can quickly retrieve information related to which users have been assigned to which security roles and the security role modification history. This report includes changes to the security role name, the parent security role, the security role type, active status, the permissions included in the security role, and users assigned to or removed from the security role. Filtering options are available, and it is also possible to report on changes that occurred prior to the release of this report.

This report supports 100,000 rows of data.

To access the Security Role - Audit Report, go to **Reports > Standard Reports**. From the System tab, select the **Security Role - Audit Report** link.

Report Details

The following report filters are available:

FILTER NAME	DESCRIPTION
Security Role	Select one security roles to include in the report. The report will return any modification history related to the selected security role.
Date Criteria	Select a date range for the report. The report will return any modification history for the selected date range. The default value is Last Month. This is a required field. Date values are set in the time zone of the user running the report.
Security Role Status	Select this option to include inactive security roles in the report output.

The following details are included in the report output:

COLUMN NAME	DESCRIPTION
Security Role Name	This displays the name of the security role that was modified.
Security Role ID	This displays the ID of the security role that was modified.
Security Role Type	This displays the type associated with the security role.

COLUMN NAME	DESCRIPTION
Security Role Active	This displays whether the security role is active or inactive.
Changed On	This displays the date on which the action occurred. Date fields are displayed in the time zone of the user running the report.
Changed By User ID	This displays the User ID of the user who modified the security role.
Changed By Username	This displays the Username of the user who modified the security role.
Changed By User Full Name	This displays the full name of the user who modified the security role.
Field Changed	This displays which field was modified within the security role, if applicable.
Action Performed	This displays the specific action that was taken upon the security role.
Old value	This displays the old value of the field that was modified, if applicable.
New Value	This displays the new value of the field that was modified, if applicable.

How Does this Enhancement Benefit My Organization?

This standard report enables organizations to monitor changes made to security roles.

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 *Security Role - Audit Report* permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Role - Audit Report	Grants access to the Security Role - Audit Report, which enables organizations to report on which users have been assigned to which security roles and the	Reports - System

	security role modification history. This permission cannot be constrained.	

Security Roles

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

New Standard Report - Security Role - User Permission Report

Customers need to review the permissions and constraints assigned to users, often to satisfy audits or meet other compliance needs.

Prior to this enhancement, the only way to report on this data was by submitting a case to customer support or to manually check each and every security role and user.

With this enhancement, a new Security Role - User Permission Report is available in all portals as a standard report so that customer can quickly retrieve the roles assigned to a user and the permissions and constraints associated with those roles. This report also includes constraints at the individual user level. Filtering options are available.

This report supports 100,000 rows of data.

To access the Security Role - User Permission Report, go to **Reports > Standard Reports**. From the System tab, select the **Security Role - User Permission Report** link.

Report Details

The following report filters are available:

FILTER NAME	DESCRIPTION
User Criteria	Select a user or a group of users to include in the report. You may choose one or more individual users as well as entire organizational units (OUs) or Groups.
Security Role	Select a security roles to include in the report. If a role is selected, the report only includes information related to the selected role.
Role Status	Select whether the report should include inactive roles.
Permission	Select one or more permissions to include in the report. If a permission is selected, the report only includes information related to the selected permission.

The following details are included in the report output:

COLUMN NAME	DESCRIPTION
User ID	This displays the ID of the user in the security role.
Username	This displays the username of the user in the security role.
User Full Name	This displays the full name of the user in the security role.
Constraint	This displays the constraint applied to the security role.
Security Role Name	This displays the name of the security role.
Security Role ID	This displays the ID of the security role.
Security Role Type	This displays the type associated with the security role.

COLUMN NAME	DESCRIPTION
Security Role Active	This displays whether the security role is active or inactive.
Parent Security Role Name	This displays the parent security role associated with the security role.
Parent Security Role ID	This displays the ID of the parent security role.
Permission	This displays the permission included in the security role.
Permission Category	This displays the category of the permission included in the security role.
Inherited Permission	This displays whether or not the permission is inherited from a child role.

How Does this Enhancement Benefit My Organization?

This standard report enables organizations to extract details on the permissions and constraints assigned to users.

Considerations

- If a security role assigned to a user contains multiple permissions, each permission is shown in a separate row.
- If a user has a permission within multiple security roles, this permission is listed multiple times, once for each security role.

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 *Security Role - User Permission Report* permission.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Security Role - User Permission Report	Grants access to the Security Role - User Permission Report, which enables organizations to report on the roles assigned to a user and the permissions and constraints associated with those roles. This permission cannot be constrained.	Reports - System

Security Roles

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

Reporting 2.0 - 12hr vs 24hr FTP File Naming Configuration Option

Prior to this release, Custom Report file names included a timestamp in a 24-hour format for reports delivered to FTP. Reporting 2.0 report file names include a timestamp in a 12-hour format for reports delivered to the FTP. This resulted in users adjusting integration due to file name differences when migrating from Custom Reports to Reporting 2.0.

With this release, users with Reporting - Manage and FTP Delivery permissions will see a new toggle on the Report Builder Automation Settings fly-out as follows:

File Name Time Stamp 24hr.

Enabling this toggle changes the timestamp to a Reporting FTP file name convention.

- If toggle is off (default), the report is named: [Report Title]_[UTC Time in format YYYYMMDD_HH_mm_ss AM/PM].
- If toggle is on, the report is named: [Report Title]_[UTC Time in format YYYYMMDD_HH_mm_ss]

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.

Reporting 2.0 - Additional Fields

The following additions and updates have been made to Reporting 2.0 fields with this release:

- **Cornerstone Learning**
- **Cornerstone Performance - Goals**
- **Cornerstone Performance - Observation Checklists**

Reporting 2.0 - Custom Report Migration Tool Enhancements

The Reporting 2.0 - Custom Report Migration Tool Enhancements are intended to improve the Reporting 2.0 Custom Migration Tool as follows:

- To support users with many reports, a new "Select all" option lets users select or deselect all reports.
- A new filter option lets users view:
  - All Custom Reports already imported into Reporting 2.0
  - All Custom Reports not yet imported into Reporting 2.0
  - All Custom Reports with errors

Additionally, in the report list, a "Last Imported" column now provides the date reports were last imported.

Implementation

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Admin Custom Report Migration	Grants access to any user to see and import all Custom Reports available in the portal. This permission cannot be constrained. This permission is automatically assigned to the Cornerstone administrator and System Administrator security roles.	Reporting

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

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

Reporting 2.0 - Environment Name Included in Subject Line of Report Delivery Email (Excluding Production)

Prior to this release, it was difficult for users to know from which environment (Stage, Pilot, or Production) a Report Delivery notification came from, because the notification did not provide environment information.

With this release, for the Stage and Pilot environments only, users will see the environment name in the Subject line of the Report Delivery email as follows:

- [Stage] Division Report
- [Pilot] User Report

Notifications from the Production environment will not have an environment name in the Subject line.

Implementation

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

Reporting 2.0 - New Report Scheduling Permission

Prior to this release, users were unable to queue a report on a schedule without FTP Delivery or Email delivery permissions. As a result, users had to have FTP Delivery or Email delivery permissions, even if not needed, to schedule a report because there is no separate permission for only scheduling reports.

With this release, a new permission, Reporting -Schedule Report Automation, lets users without FTP or email deliver access, schedule reports in report builder.

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Schedule Report Automation	Grants access to schedule reports in report builder for users that don't have access to FTP or email delivery.	Reporting

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

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

Reporting 2.0 - New Report Type: Standard Form Task

Prior to this release, users were unable to report on forms without tasks or forms with a form task status of Completed.

With this release, the new Standard Form Task report lets users report on Cornerstone HR forms, regardless of form task status. This report supports all fields from the following existing field sections:

- Form Tasks
- Forms
- User

Implementation

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

Permissions

The following new permissions applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Form Tasks - Manage	Grants access to manage the Form Tasks report, which enables administrators to report on the Forms part of Forms Tasks in any status.	Reporting
Reporting - Form Tasks - View	Grants access to the Form Tasks report, which enables administrators to report on the Forms part of Forms Tasks in any status.	Reporting

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

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

Reporting 2.0 - Report Downloading Enhancements

The February '22 release includes enhancements that will improve the report downloading experience for users in Reporting 2.0.

Prior to this release, the options, icons, and resulting actions provided for downloading reports varied from page to page.

In this release, all options, icons, and actions related to downloading reports are identical when on the Reporting 2.0 Homepage Viewer related pages.

Users can now:

- Extract reports with user's preferences by clicking the **Schedule for Now** clock icon on the Reporting 2.0 homepage and the Viewer page, or selecting **Schedule for Now** in the snapshot pop-up. When ready, the report is downloaded in the preferred format.

- Use the snapshot pop-up to select the maximum number of records to include in the snapshot. The range is from one to one million. By default the number is set to 200K.
- The defined number of records are saved as a user preference for this report and used even when the report is scheduled using the clock icon.
- Receive notification by email when the snapshot is generated. Users can deactivate the notification per report on the snapshot pop-up.
- Click the Excel icon to download the latest available snapshot in Excel format..
  - Generates a new report snapshot with fresh data.
  - The newly generated snapshot is automatically downloaded in excel format.
  - The newly generated snapshot is also available through the snapshot pop-up behind the cloud icon.
  - If a user navigates away from, or closes the window while the process is still in progress, the snapshot is still completed and available in the snapshot pop-up behind the cloud icon. The excel output is not delivered since the session is been closed. The user can still download the snapshot to Excel using the snapshot pop-up.

Function, Naming, and Icon Alignment

Functionality and icons used to generate reports are now the same and have identical behavior as follows:

- The **manually queue** option is renamed **Schedule for Now**.
- The **CLOSE** button is replaced with the standard X icon.
- The **REFRESH** button is replaced with the standard refresh icon.

- The Schedule for Now clock icon is now available on the Reporting 2.0 Homepage and Viewer page.
- The snapshot pop-up cloud icon is now available on the Reporting 2.0 Homepage and Viewer page.
- The snapshot pop-up shows a maximum of three snapshots for a report for a specific user.
  - If cloud icon is solid, no snapshots are available for the report.
  - If cloud icon contains an arrow, snapshots are available.
- If a report is generating, a spinning icon displays and all buttons that start a new report generation are disabled until the current generation is complete.
- If a report has mandatory filters and no defined filter values, the clock icon and the Schedule for now button are disabled. The user must add the required filters on the Viewer page to run this report.

Considerations

- After this release, snapshots for reports that were manually queued before October 29, 2021 are no longer available in the snapshot pop-up. To save these snapshots, download a copy of the snapshot before February 25, 2022.
- The default number of records in the snapshot pop-up is 200K.
- PDF and HTML appear as format options in the snapshot pop-up when the number of records in the snapshot is 10K or less.
- If a report contains mandatory filters that do not have a value, snapshots will not generate until a value is selected on the Reporting 2.0 Viewer page.
- When a Custom Report is re-imported, all preferences users previously defined are removed. Users can redefine their preferences after the reset, based on their available options.
- When a Report Owner updates or saves a report in the Report Builder, the following user preferences are automatically removed and reset to default:
  - Filter Criteria
  - Column sorting

  Users can redefine their preferences after the reset, based on their available options.

Implementation

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Reporting - Schedule Report Automation	Grants access to schedule reports in report builder for users that don't have access to FTP or email delivery.	Reporting

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

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

Reporting 2.0 - Report Header Enhancements

Prior to this release, when users downloaded a report, the report header included "Report date/time", but did not indicate it is the download date or generated date. Additionally, the report header did not include the source of the report to confirm whether the data is coming from CSOD.

With this release, in the Report Properties in the Report Builder or the Report Output Properties in the Report Viewer, if the **Hide Report Header** toggle is set to "Off" for a report, users can view the following details from the downloaded report:

- Report Generated Date/Time
- Report Source - Portal address is displayed as a URL

This toggle appears in Report Properties in the Report Builder or Report Output Properties in the Viewer.

Implementation

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

Reporting 2.0 - "Shared With Me" is Default Folder for Users With Only View Permissions

Prior to this release, when selecting Reporting 2.0, users were directed to the "My Reports" folder. As a result, this folder is empty for users with only view permissions.

In this release, users with view permissions are directed to the "Shared with me folder" on the Reporting 2.0 Homepage. If no reports are available, users will see the following message: "No reports have been shared with you yet. You may have reports available in other report folders, shown on the left side of this page. "

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.

Reporting 2.0 - Updated Message for Empty State Landing Pages

In this release, users with view and manage permissions who select Reporting 2.0 but did not create any reports, are directed to the My Reports folder, and will see the following adjusted message: "You have not created any reports yet. Please proceed with creating a report or view reports shared with you in the folders on the left side of this page."

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.

Reporting 2.0 - Viewer Enhancements

Prior to this release, preferred settings were not saved when users left the Reporting 2.0 Viewer page, so users had to re-select settings each time they opened this page.

With this release, preferences defined by the user are automatically saved and will be re-applied the next time the user visits the Reporting 2.0 Viewer page or extracts the report.

Saved Preferences

Users can now save the following preferences:

- Report Viewer Properties
  - Show/hide Filters
  - Show/hide Chart
  - Show/hide Chart labels
  - Show/hide Data
- Report Data Output Related
  - Filter criteria/values
  - Show Grand Summary
  - Column sorting
  - Snapshot completion notification on/off
  - Number of records in snapshot output from 1 to 1 million

New Options Available in the Reporting 2.0 Viewer Page

- Report Configuration Properties as follows:
  - Hide Report Header on/off
  - Display Filter Criteria on/off
  - Auto-Refresh on Open on/off
  - Notify me for report completion on/off
  - Maximum number of records define
- Then Options menu now contains a Reset Filters option which discards the user-defined filter preferences, and returns to the Report Owner filter settings.

Considerations

- After this release, snapshots for reports that were manually queued before October 29, 2021 are no longer available in the snapshot pop-up. To save these snapshots, download a copy of the snapshot before February 25, 2022.
- The default number of records in the snapshot pop-up is 200K.
- User preferences override what is configured in the builder for all report configuration properties, except when **Display filter criteria** or **Auto-Refresh on Open** options are set to Off in report builder. This applies per user per report.
- If a report contains mandatory filters that do not have a value, snapshots will not generate until a value is selected on the Reporting 2.0 Viewer page.

- When a Custom Report is re-imported into Reporting 2.0, all preferences users previously defined are removed. Users can redefine their preferences after the reset, based on the available options.
- When Report Owner updates or saves a report in the Report Builder, the following user preferences are automatically removed and reset to default:
  - Filter Criteria
  - Column sorting

  Users can redefine their preferences after the reset, based on their available options.

Implementation

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

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Reporting - Schedule Report Automation	Grants access to schedule reports in report builder for users that don't have access to FTP or email delivery.	Reporting

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

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

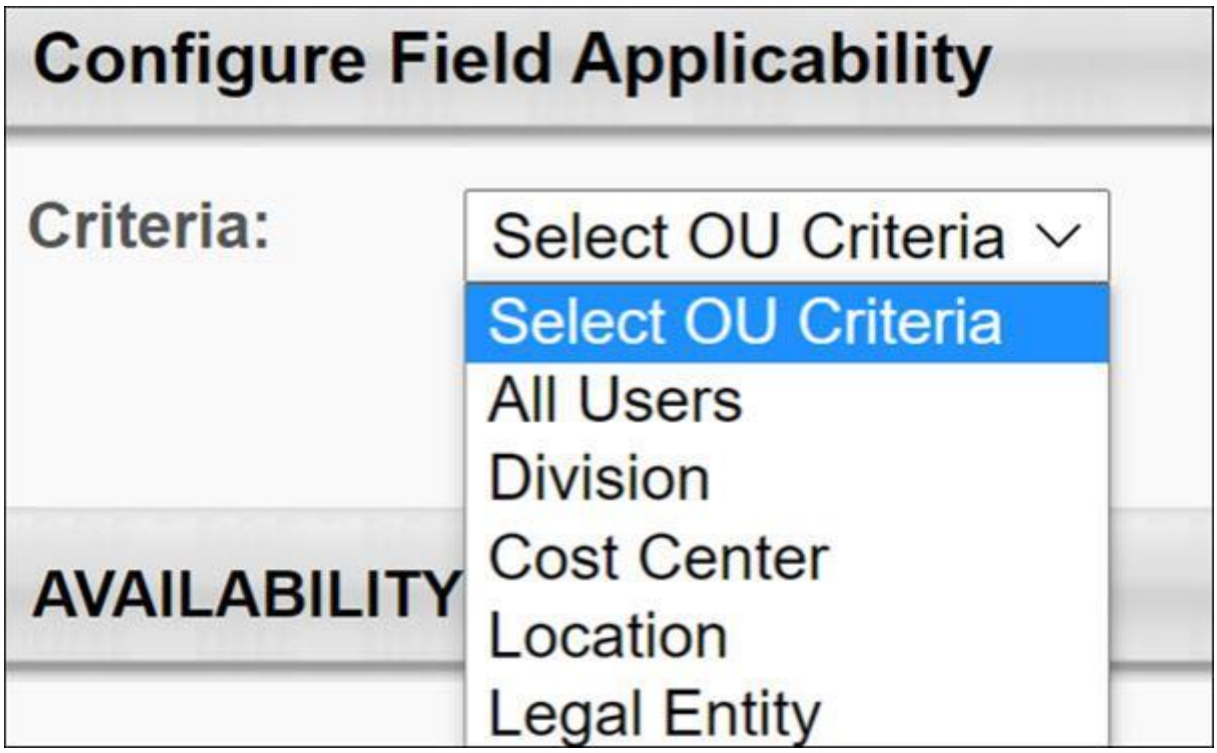
Cornerstone HR

OU-based Applicability

Prior to this release customers were unable to configure custom fields relevant to employees based on the Organizational Unit (OU) demographics, making it difficult to support location-based information.

With this release, the User Record Custom Field Administration page lets users configure applicability for each individual custom field. Administrators can define the OU criteria for each custom field that specifies which custom fields are applicable to a given user. Administrators can define applicability using a combination of the following OUs:

- Cost Center
- Division
- Legal Entity
- Location



OU-based impacts the following features:

- User Record - Only the custom fields that are applicable to a user are displayed. A user's OU values determine which custom fields meet applicability criteria and only the applicable custom fields are displayed. When viewing a User Record, only the applicable custom fields are displayed and when editing after the Admin specifies the OU values, relevant applicable custom fields are displayed.
- Universal Profile - Only custom fields that are applicable to a user are displayed.
- My Account Preference page - Custom fields appear only if applicable to the target user.

- Forms - Only custom fields configured for the selected form and applicable to the target user display when launching the form.

Applicability Setting in Custom Field Administration

This setting enables organizations to ensure that only relevant data is displayed to the target user.

For CHR customers, each user record custom field has applicability defined as **All Users** by default. Applicability is a required field.

Organizations can restrict the applicability by the following OU types:

- Cost Center
- Division
- Legal Entity
- Location

Only one criterion can be set per OU type. If several criteria are selected, the OR condition applies.

The applicability setting applies to the User record, Universal profile, the user's My Account Preference page and Forms. Only the applicable custom fields based on the defined OU type values of the target user are displayed. When the setting is adjusted in the custom field administration page, it is immediately reflected on the appropriate pages.

How Does This Enhancement Benefit My Organization?

Customers with employees across multiple regions can support local compliance regulations using location-based data.

Implementation

- This functionality is automatically enabled for all organizations using Cornerstone HR.
- Applicability for existing custom fields is set to "All Users" to ensure custom fields behave as-is. This allows customers to configure applicability for the relevant fields while the rest remain the same.

Considerations

- Only one criterion is set per OU type.
- If several criteria are selected, the OR condition applies.
- Although it is possible to change the OU values on the form (based on the form configuration), the applicability of the custom fields is may not be reflected immediately in the following situations:
    - OU types and custom fields are on one page within the form - If the OU type value on the form is changed, no refresh is initiated and custom fields remain the same.
    - OU types are on a different page than the related custom fields on the form - If the OU type value on the form is changed and the user is navigating to the next page

of the form, a refresh is initiated, and custom fields are displayed according to the OU selection.

- This feature only impacts existing inbound data feeds whenever the defaulted applicability setting for custom fields is adjusted and is no longer defined as “All Users”.The applicability logic is also taken into account in the inbound data feeds.

Permissions

The following new permission applies to this functionality:

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

The following existing permission applies to this functionality:

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

Users - Edit Secure User Custom Fields - Unmasked	Grants the ability to edit secure user custom field info unmasked. This permission can be constrained by OU, Restrict to User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - Manage Secure User Custom Fields	Grants the ability to manage the setting secure user custom fields. This permission can be restrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Masked	Grants the ability to view secure user custom field info masked. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - View Secure User Custom Fields - Unmasked	Grants the ability to view secure user custom field info unmasked. This permission can be constrained by OU, User's OU, User Self and Subordinates, User, User's Self, User's Manager, User's Superiors, User's Subordinates, User's Direct Reports, Employee Relationship. This is an administrator permission.	Core Administration
Users - Manage OU Based Regex	Grants access to manage OU-based Regex patterns for user custom fields. This permission cannot be restrained. This is an administrator permission.	Core Administration

Workflow Engine

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.

Cornerstone combines 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

- 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

- 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

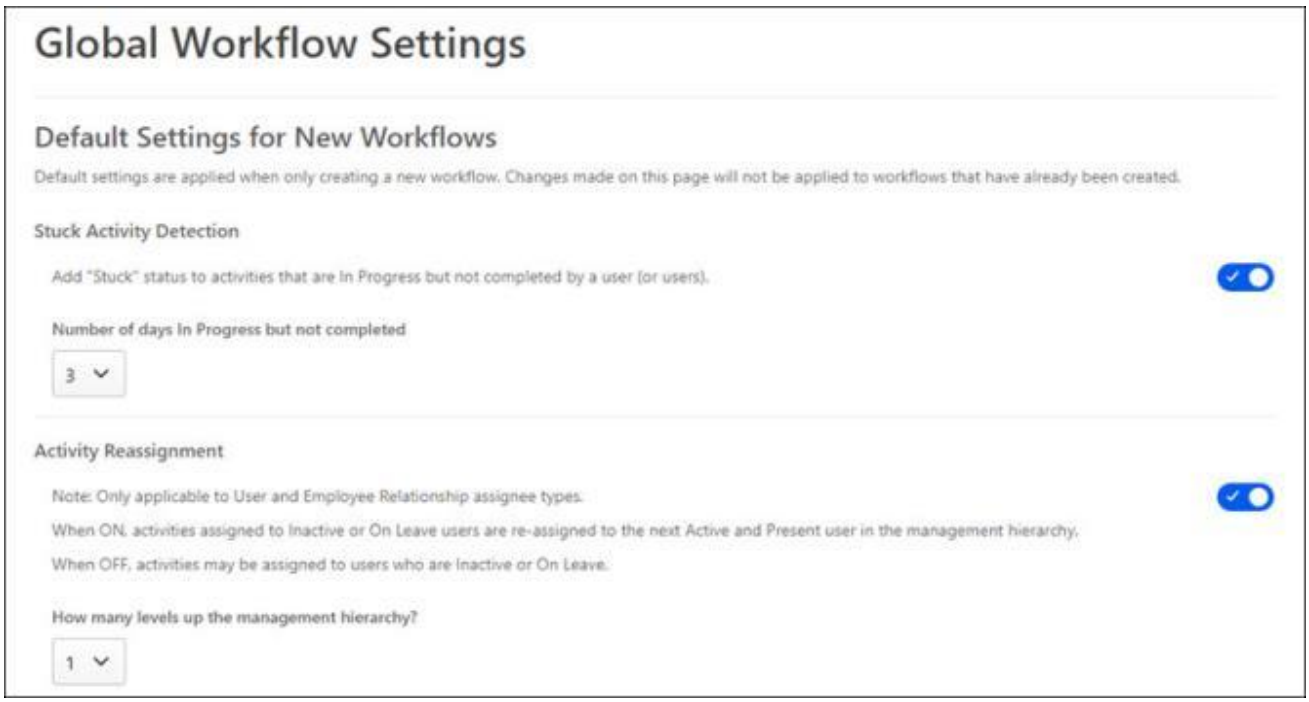
Workflow Engine - Manage Global Workflow Settings

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 177 *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

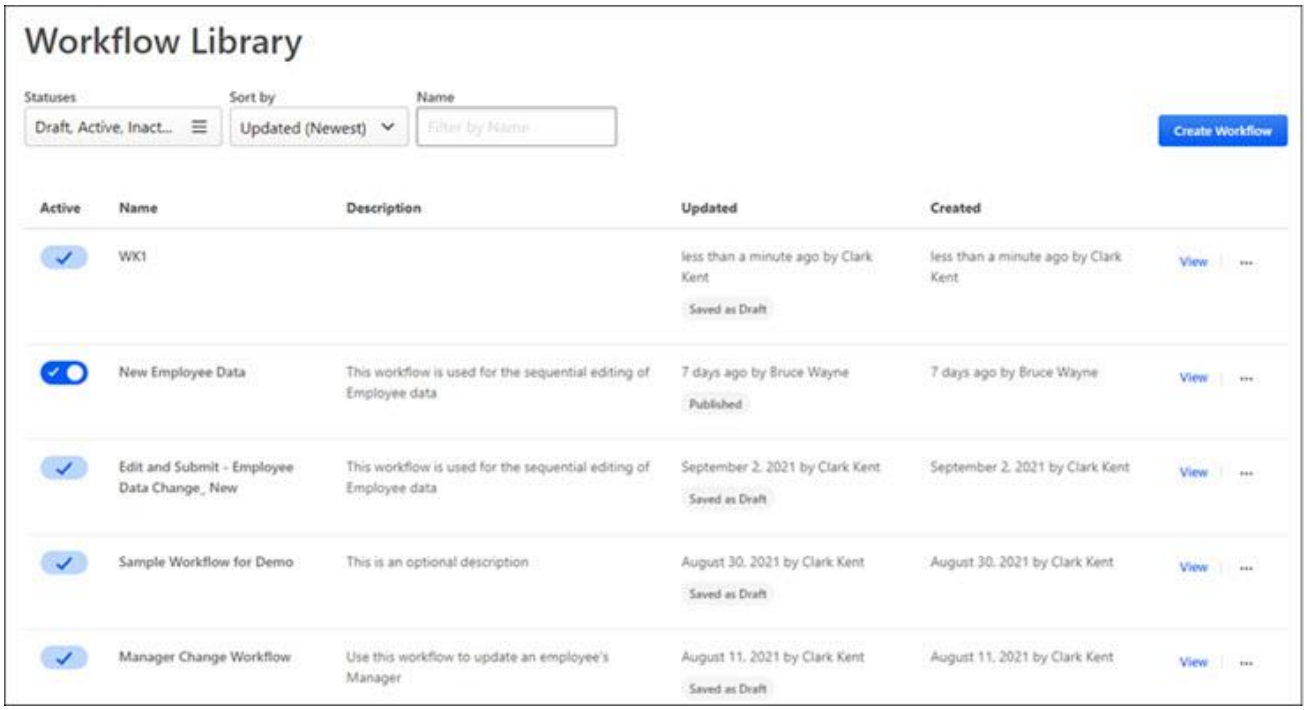
Use the Workflow Library page to search, view, create, activate/inactivate, edit, copy, and archive workflows.

***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 162 *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 168 *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 168 *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 177 *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

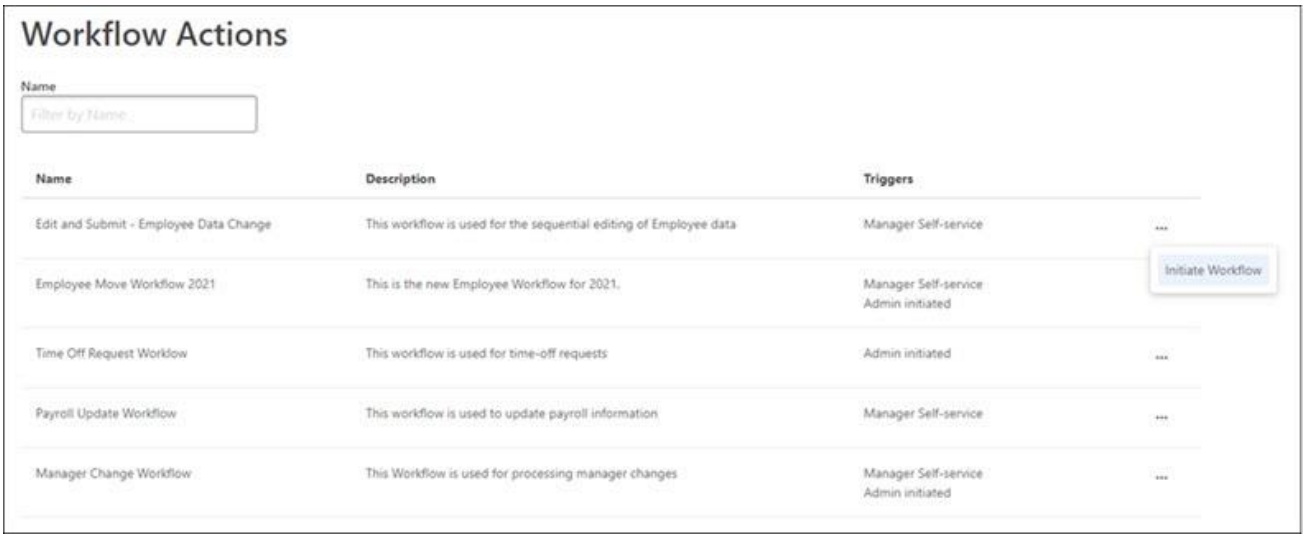
Use the Workflow Engine Workflow Actions page or the Universal Profile page to assign workflows. The workflows that appear on each page depend on the triggers set when editing or creating the workflow. *See* **Workflow Engine - Manage Workflow Triggers** on page 173 *for additional information.*

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

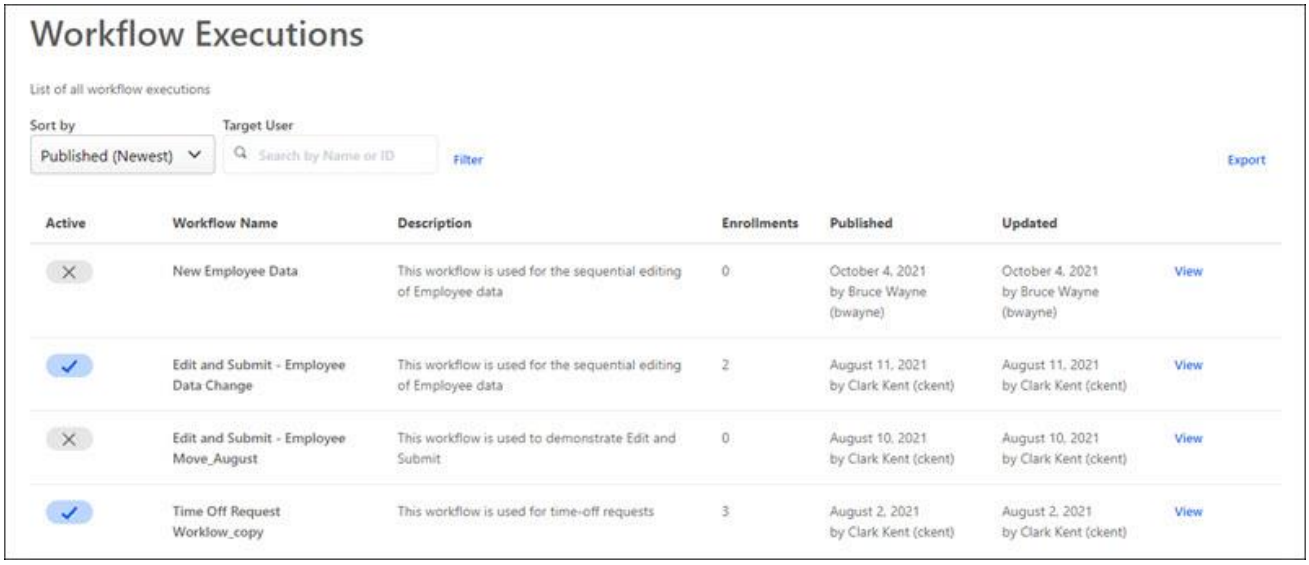
Workflow Engine - Manage Workflow Execution

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.

Cornerstone Xplor

Cornerstone Xplor Overview + Career Explorer (Early Adopter) Enhancements

Cornerstone Xplor is a one-stop destination for curated, personalized content that helps employees design their own pathway to success.

With Cornerstone Xplor, users can:

- Deepen purpose with meaningful career development
- Provide hyper-personalized development pathways for skill building
- Enable fluid team learning and collaboration
- Drive growth outcomes with insights into what is and isn't working
- Weave continual growth into everyday productivity tools
- Understand the full range of capabilities for each employee
- Improve development efficiency with modern content
- Scale and deepen their learning data library
- Plug and play with an open architecture designed to connect to any ecosystem

Learners can identify a realistic pathway for advancement and view the content they need to reach their career goals through self-directed learning intertwined with the context of their job. Users can continually self-assess their skills, so they can see their tangible progression and regular improvements to the content recommendations.

With Career Explorer, users can view and manage:

- Career details for new career paths
- Targeted content related to the skills needed for their career path
- Colleagues currently in their selected career path
- Personalized skills-based position matches
- Open job matches for the roles they follow (when their organization's Recruiting system is integrated)

Anyone can use Career Explorer to view internal career opportunities and targeted learning resources to help them reach their career goals. With Career Explorer, user will find curated content designed to help them excel in their current position and develop the skills necessary for their next position. Career Explorer was previously available as a beta but has reached Early Adopter phase with this release.

Career Explorer (Early Adopter) Enhancements

- Search for roles beyond the personalized suggestions.
- Display user's predicted skills in match-details – to better explain the skill-gap overview.
- Ability to see all open job matches for the role being followed – to gain better clarity into all
- real opportunities.

Cornerstone Xplor Resources

Click here to access the .

Click here to download Cornerstone Xplor Starter Guide.

Learning

Ability to Remove Self-Requested Training After Versioning

Ability to Remove Self-Requested Training After Versioning

During the October '21 release, the ability for end users to remove self-requested training from their own transcripts was made available. However, if the training they had self-requested was versioned between when they requested it and when they attempted to remove the training, it was not possible for the user to remove the training from their transcript.

With the February '22 release, in Stage portals, end users can now remove self-requested training that was versioned by an administrator after the user requested it.

This enhancement is only available in Stage during the Feb '22 release. This enhancement will be made available in Production and Pilot with the May '22 release.

Exclusions

In some scenarios, there are exclusions to this enhanced behavior. Please note the following scenario and the resulting system behavior:

A learner self-requests a training item. An administrator assigns the same training via the Learning Assignment Tool with the **Maintain Progress** option turned ON.

- Expected Result: Learner should not be able to self-remove the training.
- Actual Result: Learner will be able to self-remove the training.

Implementation

This functionality is automatically available in Stage portals using the Learning module. Access to the ability to remove self-requested training is controlled by the *Remove Training - Self Requested* permission.

Permissions

The following existing permission applies 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.	Universal Profile

	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.*	
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 - Administratio n

Remove Self-Requested Training from Transcript

Learners can remove training items they self-requested from their transcripts using a new **Remove** option available on the Transcript page. This option is available for self-requested training even if the training has been versioned since the learner requested it.

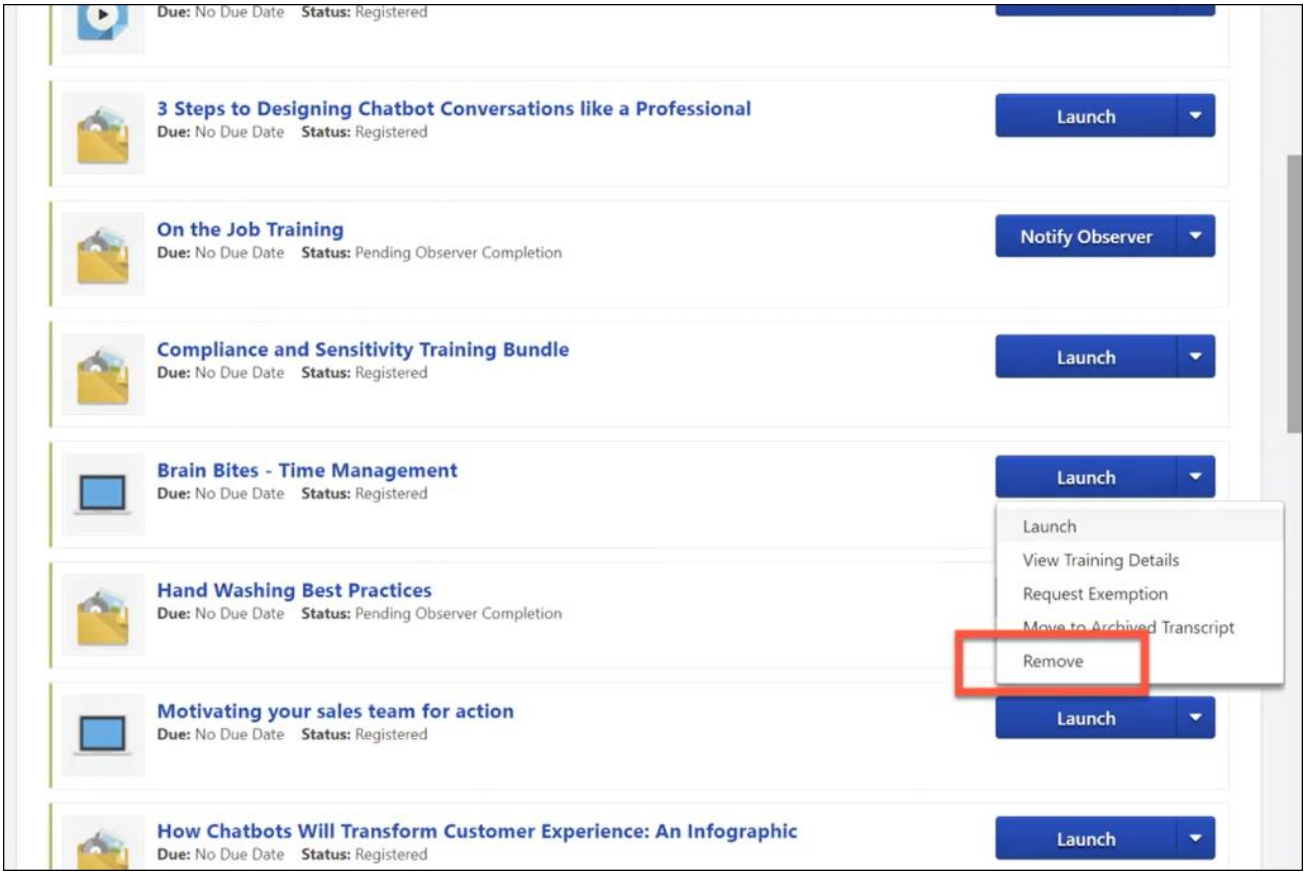
To access the Transcript page, go to HOME > UNIVERSAL PROFILE. Then, click the Transcript tab. ***Note:*** *The location of this link is configurable by your system administrator.*

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	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

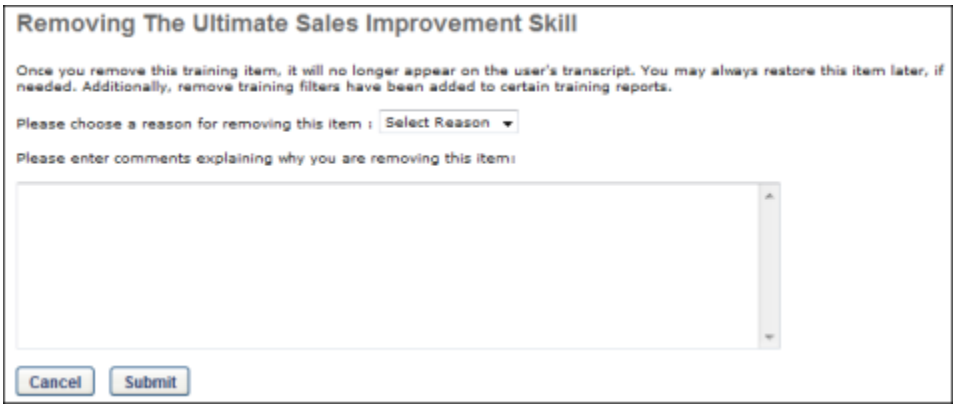


Remove

After a 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.



Ability to Update Custom Certificate Template for All Certifications

Ability to Update Custom Certificate Template for All Certifications

Prior to this enhancement, when an administrator needed to upload or update a custom certificate template for all of their system's certifications, it was necessary to open a work order.

With this enhancement, a new permission is available, which allows administrators to upload and update the custom certificate template for all of their system's certifications via self-service.

This enhancement is not available during UAT. It will be made available in all portals on Feb 25, 2022.

Considerations

This feature only allows administrators to configure one certificate template for all certifications. It is not currently possible to configure different certificate templates for different certifications within the portal.

Implementation

This functionality is automatically enabled in all portals using the Learning module on Feb 25, 2022. It will not be available during UAT. The new permission which controls access to this feature is automatically added to the System Admin security role.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Custom Certificate Update	This permission grants access to the **Update Certificate for All Certifications** link on the Certification Administration page. The **Update Certificate for All Certifications** link allows administrators to upload and modify a certificate template for all the certifications in the system at once. This is an administrator permission. This permission cannot be constrained.	Learning - Administratio n

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

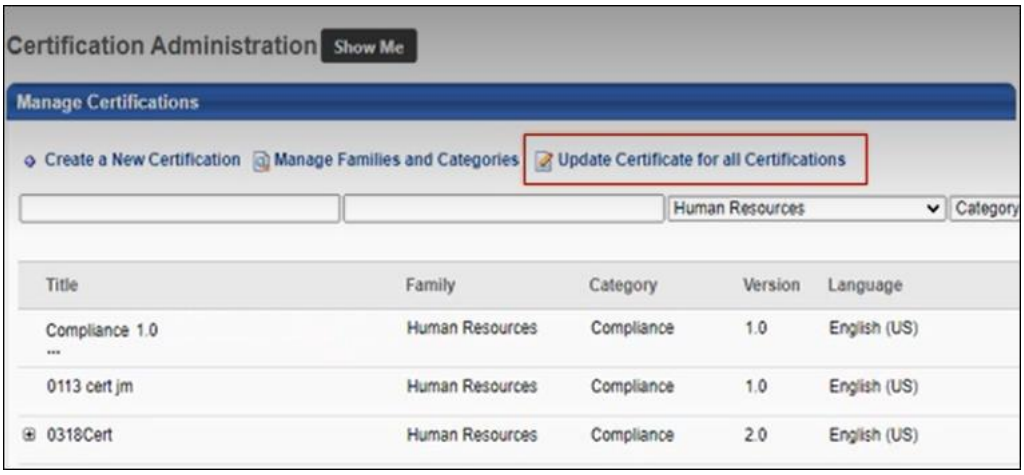
Certification Administration - Update Certificate for All Certifications

On the Certification Administration page, administrators with the relevant permission can upload and update the custom certificate template for all of their system's certifications.

To access the Certification Administration screen, select ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CERTIFICATIONS.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Custom Certificate Update	This permission grants access to the **Update Certificate for All Certifications** link on the Certification Administration page. The **Update Certificate for All Certifications** link allows administrators to upload and modify a certificate template for all the certifications in the system at once. This is an administrator permission. This permission cannot be constrained.	Learning - Administration
Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

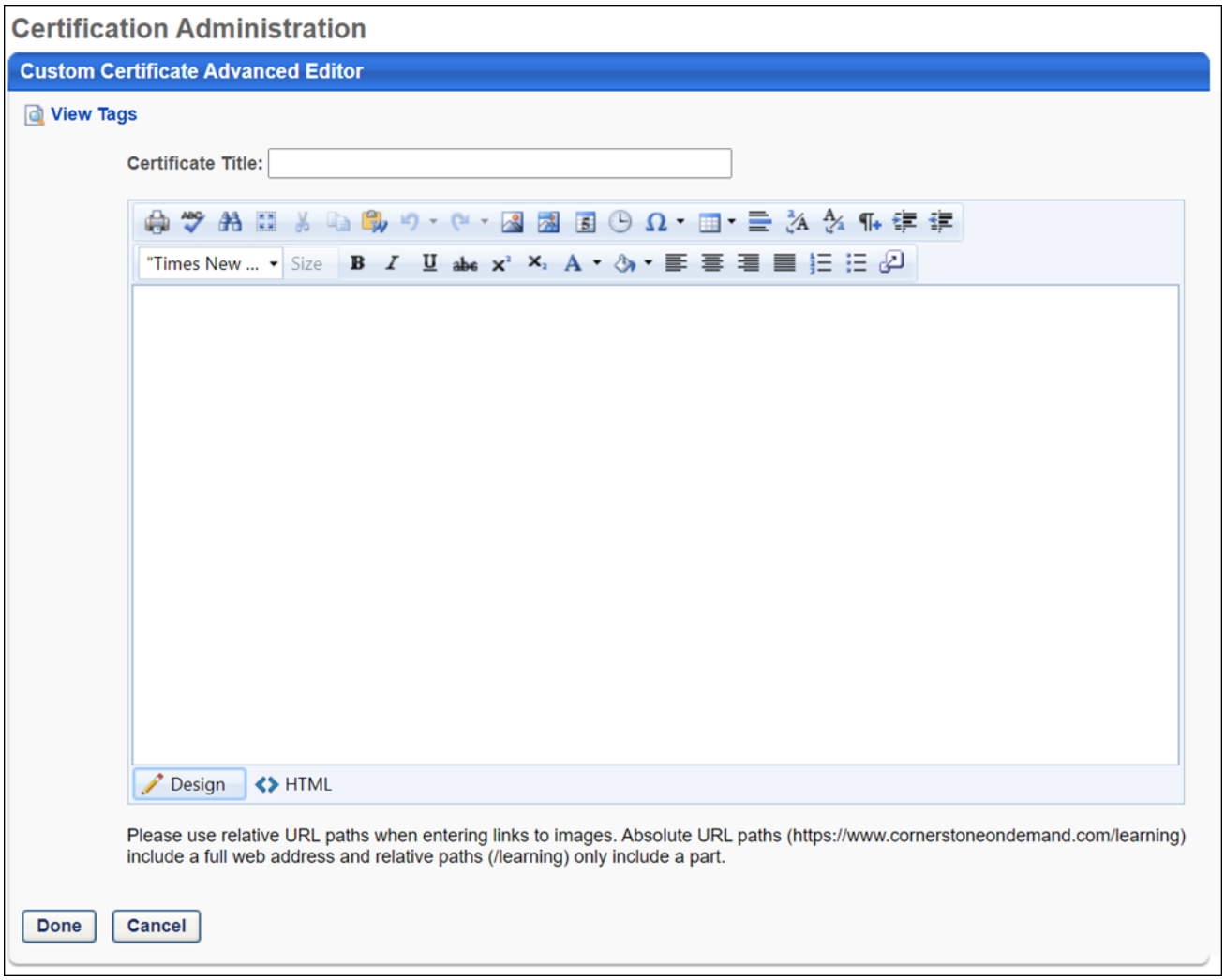


Update Certificate for All Certifications

Administrators with the *Certification - Custom Certificate Update* permission have access to the **Update Certificate for all Certifications** link on the Certification Administration page. Click the **Update Certificate for all Certifications** link. This opens the Custom Certificate

Advanced Editor page, where the administrator can configure a certificate template that will apply to all certifications.

For more information about creating custom certificates: *See Create Custom Certificates.*



Adyen Payment Processor - Self-Service Enablement in Edge Marketplace

Adyen Payment Processor - Self-Service Enablement in Edge Marketplace

Prior to this enhancement, it was necessary to open a support case in order to enable the Adyen Payment Processor in the Cornerstone system.

With this enhancement, administrators can enable the Adyen Payment Processor via self-service using the Edge Marketplace.

Considerations

- Only one payment processor may be enabled in a portal at a time, with the exception of the PayPal Payment Processor. The PayPal Payment Processor may be enabled in addition to one other payment processor, such as the Adyen Payment Processor.
- Costs are associated with the creation of an Adyen merchant account, and these fees are charged by Adyen. Cornerstone is not responsible for any costs incurred through Adyen.
- The enablement of the Adyen Payment Gateway within the Cornerstone system has an associated cost. For more details, please contact your Account Manager.

Exclusions

At this time, only credit card payments are supported through the Adyen Payment Processor. E-checks and processing fees calculation are NOT currently supported.

Implementation

Administrators can enable the Adyen Payment Processor via the Edge Marketplace. *See* **Adyen Payment Processor - Enable in Edge** on page 200 *for additional information.*

Please contact Adyen to create Adyen merchant account.

Edge Guide

Click here for the Adyen Payment Gateway Edge Guide!

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

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

Adyen Payment Processor - Enable in Edge

The Adyen Payment Processor integration can be enabled via the Edge Marketplace.

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

Permissions

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

Adyen - Edge Marketplace

To enable the Adyen Payment Processor:

1. Search for and select the Adyen tile in the Edge Marketplace.
2. Then, click the **INSTALL** button for the Adyen integration.
3. Review the terms and conditions of using the Adyen integration and check the acknowledgment box to confirm that you read, understood, and agree to the terms and conditions.
4. Click the **INSTALL** button. The integration will be installed.
5. Enable the Adyen tile in Edge in order to activate the payment processor. The Active toggle is switched to the Off position by default.

Account details for your Adyen account must be added within the Cornerstone system, via the Define Payment Account page. *See* **Adyen Payment Processor - Define Payment Account** on page 201 *for additional information.*

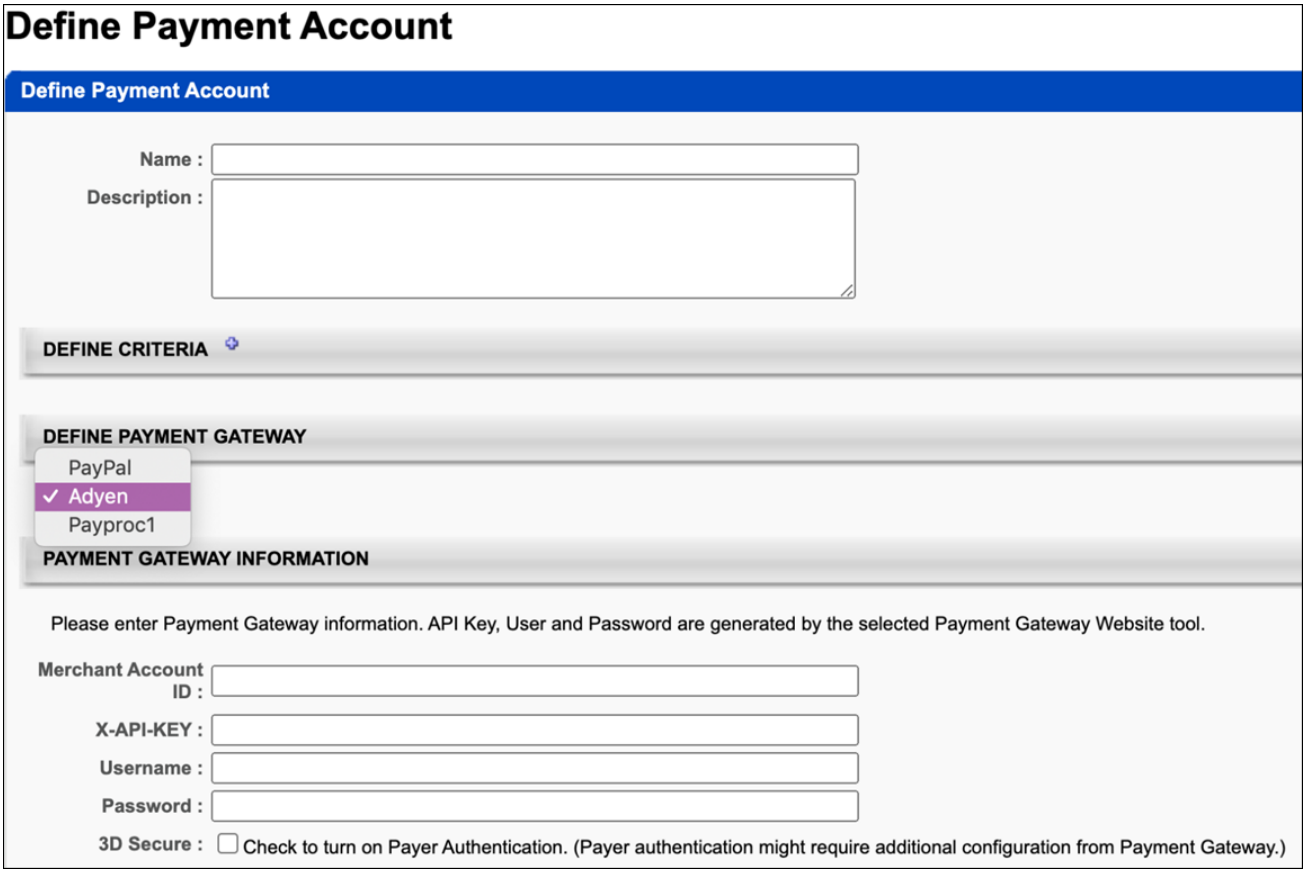
Adyen Payment Processor - Define Payment Account

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

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

Permissions

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



Define Payment Gateway

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

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

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

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

Save/Cancel

Click **SAVE** to save the payment account. Or, click **CANCEL** to cancel creating the payment account.

Certification Administration - New Option Available for Calculating Credits

Certification Administration - New Option Available for Calculating Credits

Prior to this enhancement, it was necessary for administrators to open a work order to enable the visibility of the **Only the current registration number for any training item will be credited for any given period** checkbox in the Details section for certifications in Certification Administration.

With this enhancement, the **Only the current registration number for any training item will be credited for any given period** checkbox is visible in all portals by default, allowing any organization to use this setting. When this checkbox is selected, only the completion of the current registration number for any training item will be credited for any given period. The certification will ignore previously completed registrations of a training item when applying credit to any period (initial and renewal).

This enhancement is not available during UAT.

Considerations

The following considerations apply to this enhancement:

- When editing a certification, the **Only the current registration number for any training item will be credited for any given period** option cannot be modified if the certification has at least one registered user.
- When the **Only the current registration number for any training item will be credited for any given period** checkbox is NOT selected for a certification, each period considers each registration completion in consecutive order, starting with the first registration for a training item when crediting the period.
- Customers who previously submitted a case to customer support to make this setting visible in their portal are not impacted by this enhancement.

Implementation

This enhancement is not available during UAT. It will be made available in Stage and Production portals with the Feb 25th release.

This enhancement will be enabled by default in all portals using the Learning module.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

Certification Administration - Current Registration Number Option

With this enhancement, the **Only the current registration number for any training item will be credited for any given period** checkbox is automatically available during the certification creation process.

To access the Certification Administration page, select ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT > CERTIFICATIONS. Then, click the **Create a New Certification** link to begin creating a new certification.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Certification - Manage	Grants administrators ability to manage certifications. This permission can be constrained by OU and User's OU. This is an administrator permission.	Learning - Administration

Current Registration Number

The **Only the current registration number for any training item will be credited for any given period** option is available in the Details section of the General step of creating a certification. Select the checkbox to enable the option for the certification, and unselect the checkbox to disable the option for the certification. This option is unselected by default.

For more information about the General step of creating a certification: *See Certification - Create - Step 1 - General.*

Content Uploader Enhancement - Ability to Modify Course Manifest File

Content Uploader Enhancement - Ability to Modify Course Manifest File

When an online course only requires minor updates, you can replace the files without creating a new version of the online course, using the **Modify Content** option available on the Course Console page for the class. Prior to this enhancement, the course files uploaded during the modification process had to be the same file structure as the original files in order for the online course modification to process. This meant that even if only minor updates were made to the course file structure, the course had to be versioned. When a course is versioned, users may be required to retake the course to receive completion credit, or the administrator must take action to ensure users receive completion credit for prior versions of the course.

With this enhancement, administrators may make select minor updates to the course manifest without triggering a new course version. The fields that may be modified in the course manifest without triggering a new version include:

- Mastery score
- Href/launch location
- Files under "Resources"
- Title
- Description
- Keywords
- Duration

Exclusions

This enhancement does not apply to multi-course packages.

Considerations

The following course protocols are affected by this enhancement:

- AICC
- SCORM 2004
- SCORM 1.2

Changes made to the following course manifest fields do not overwrite any fields in the Learning Management System:

- Title
- Description
- Keywords
- Duration

The above fields can be edited from the Course Console page for the online course.

Implementation

This functionality is automatically enabled for all portals using the Learning module and Content Uploader. This enhancement does not apply to organizations using the Course Publisher.

Permissions

The following existing permissions apply to this functionality:

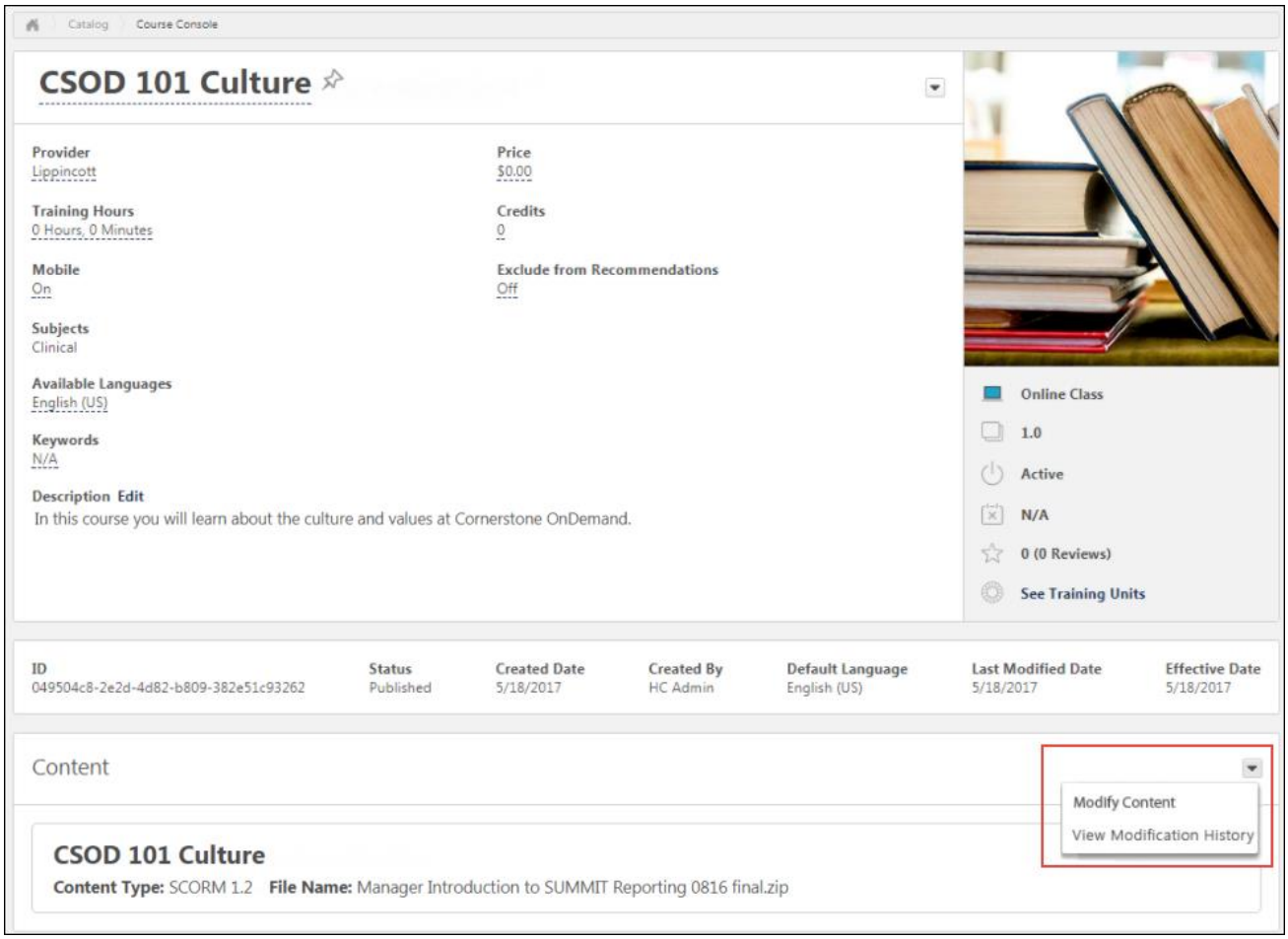
PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Course Catalog - Update	Grants ability to manage and edit training items listed in the Course Catalog and also grants access to the Course Console, where training can also be managed and edited. This permission also grants access to the Popular Requests and Highest Rated widgets on the Learning Admin Console (in conjunction with the Learning Admin Console - View permission). This permission also allows administrators to reversion online courses via the Course Console page. This permission also allows administrators to access an **Edit Training** option for training items included as objectives in Development plans. This permission can be constrained by OU, User's OU, Training Type, Training Item, Provider, ILT Provider, User's ILT Provider, User, User Self and Subordinates, and User's LO Availability. This is an administrator permission. ***Note:*** *Adding an OU constraint and a provider constraint to this permission results in an "AND" statement.*	Learning - Administration
Online Class - Modify	Grants ability to modify an online class without creating a new version of the online class.	Learning - Administration

Modify Online Course

To create modify the course files for an online course, go to ADMIN > TOOLS > LEARNING > CATALOG MANAGEMENT and click the **Course Catalog** link. Find the online class in the Course Catalog and then click the course title. From the Course Console page, click the **Options** drop-down menu in the Content section and click the **Modify Content** option.

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
Online Class - Modify	Grants ability to modify an online class without creating a new version of the online class.	Learning - Administration



Modify Content

To modify the course files of an existing course, click the **Modify Content** option in the Content section. This directs you to the Modify Content page, where you can upload the modified course files.

To upload a modified set of course files or publications:

1. Drag and drop your zipped SCORM or AICC course files into the Upload Files box, or click the **ADD FILES** button and select the zipped course files from your computer. ***Note:*** *Courses must be zipped into a single zip file. You can upload up to 750 MB per file.*
2. After the course files have been added, they will begin uploading. A progress bar below the files displays the ongoing upload progress for the files. Each set of files displays the following information:
   - **File name**
   - **File Type**
   - **Status** (i.e., Uploading, Critical Error)
3. If there are problems with the upload, the status changes to Critical Error or Completed with Comments, and you can click the **VIEW ERROR REPORT** button to view the reasons for the upload errors and address any issues. Once the files successfully finish

uploading, they are transferred to the Processing section. Continue managing the upload from the Processing section.

The fields that may be modified in the course manifest without triggering a new version include:

- Mastery score
- Href/launch location
- Files under "Resources"
- Title
- Description
- Keywords
- Duration

If changes are made to any other course manifest fields, the **Modify Content** action will fail and an error will result.

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

Important: *The deprecation of Learning Loads for Data Load Wizard has been delayed until the May '22 Release.* ***Please select this link to visit the Success Center for additional information.***

Ability to perform learning data loads using Data Load Wizard will be deprecated with an end-of-life in the May ‘22 Release. Defects will no longer be fixed, and Data Load Wizard Learning Loads will no longer be visible or accessible in customer portals. Data Load Wizard is a legacy data load tool which was built on older technology, is accessed using an older user interface (UI), and experiences slow performance and limited load type support.

Edge Import addresses these issues with a modern 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 May ‘22 Release, which will be the end-of-life date and end-of-support for Data Load Wizard learning data loads.

Deprecation of Microsoft 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 Experience When Viewing Child Training with Due Dates in the Curriculum Transcript

Improved Experience When Viewing Child Training with Due Dates in the Curriculum Transcript

Prior to this enhancement, when viewing child training in a curriculum on a learner's transcript, the curriculum transcript status of the child training was based on the earliest due date for that child training in all the curricula on that learner's transcript, even if the due date for the child training was set to a future due date inside of this curriculum. For example, if a curriculum's minimum due date was in the past and the user viewed a training item within the curriculum whose due date was in the future, the user would see the child training item in a status of Registered/Past Due. In addition, reporting would display the transcript status for the child training item as Registered even though the user interface showed the transcript status as Registered/Past Due.

With this enhancement, the transcript status of child training will be in sync with the child training's due date configured within curriculum structure and displayed in the curriculum that the user is currently viewing. For example, if the curriculum's minimum due date is in the past and the user views a training item within the curriculum whose due date is in the future, the user will see the child training item in a status of Registered. The minimum due date of the curriculum does not cause child training items to display as Past Due. This updated behavior will also be accurately reflected in reporting. ***Note:*** *It may take several hours for the Past Due status to appear in the transcript.*

For more information about the reporting aspect of this enhancement: *See Reporting Fields - Learning.*

Examples

Scenario: L1 is a child training item in both Curriculum A and Curriculum B. L1's due date in Curriculum A is 15-Oct-2021 and L1's due date in Curriculum B is 20-Mar-2022. The learner is registered for L1 in both Curriculum A and Curriculum B.

Before this Enhancement:

• When viewing L1 in Curriculum A, its transcript status is Registered/Past Due.

• When viewing L1 in Curriculum B, its transcript status is Registered/Past Due even though it is not past due in the context of this curriculum.

After this Enhancement:

• When viewing L1 in Curriculum A, its transcript status is Registered/Past Due.

• When viewing L1 in Curriculum B, its transcript status is Registered.

Implementation

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

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

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

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. The following features have been added to the Learning Assessments (Open Beta):

- **Question Bank** - *See* **Learning Assessments (Open Beta) - Question Bank** on page 223 *for additional information.*
- **Categories Home** - *See* **Learning Assessments (Open Beta) - Categories Home** on page 220 *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

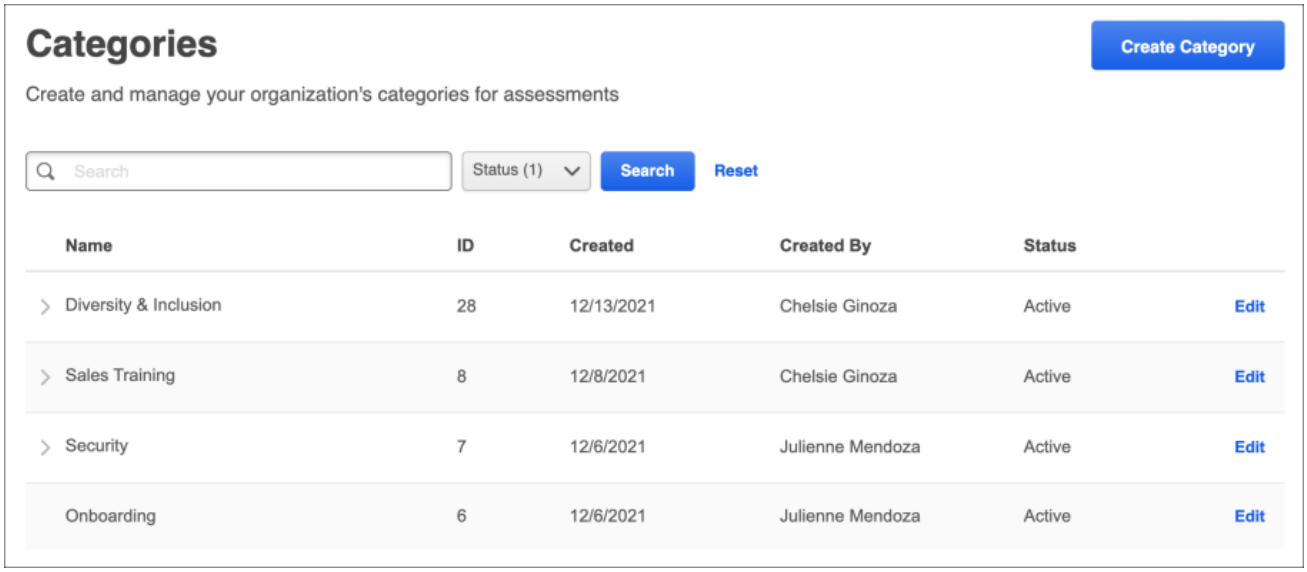
Learning Assessments (Open Beta) - Categories Home

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 Assessments - Question Bank.*
- **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.

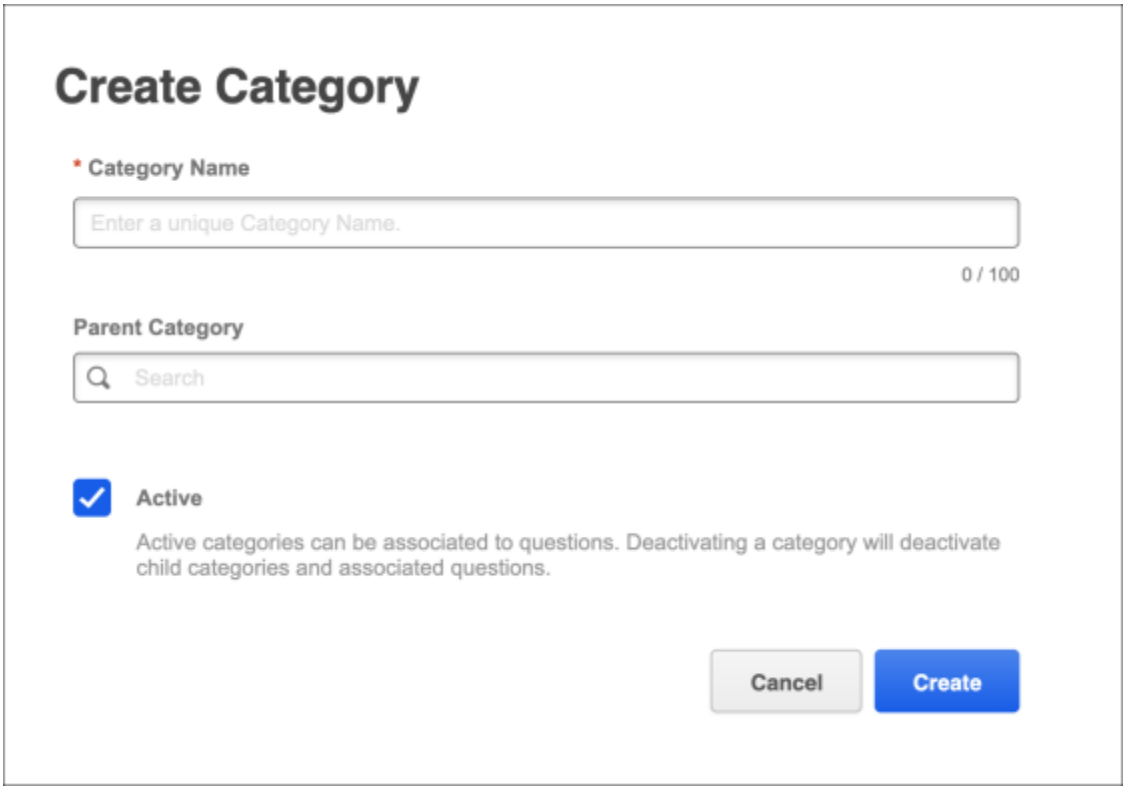
Create Category

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

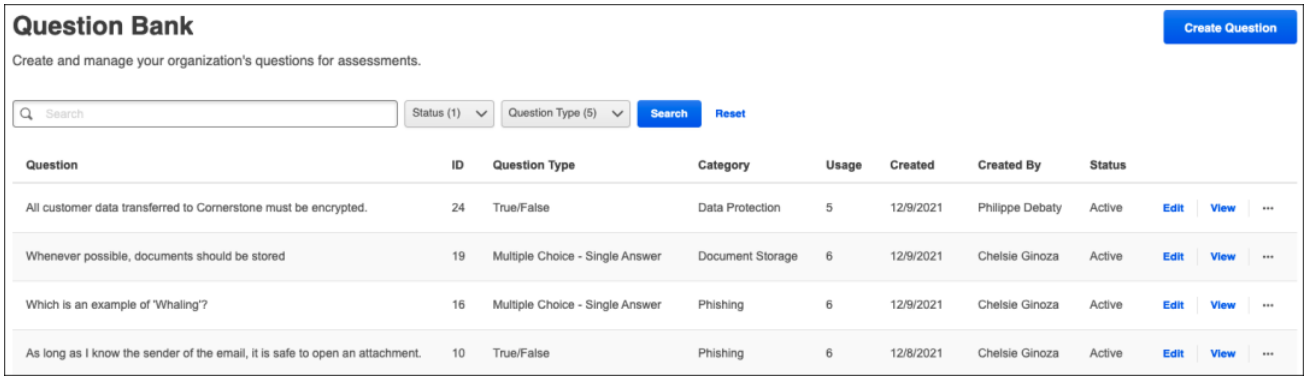
Learning Assessments (Open Beta) - Question Bank

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) Enhancements - Categories Home.*
- **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.

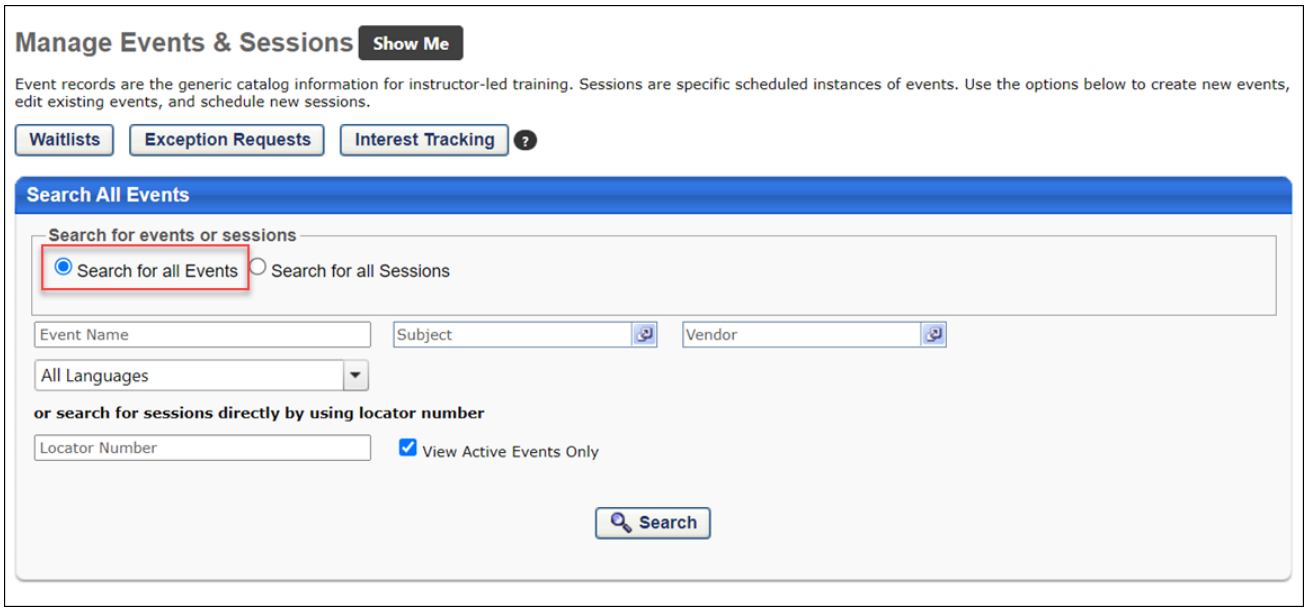
Manage Events and Sessions - Optimized Search Experience (Open Beta)

Manage Events and Sessions - Optimized Search Experience (Open Beta)

With the Feb ’22 Release, the search functionality on the Manage Events and Session page in Stage environments will begin to utilize “elastic search” technology on the backend when the **Search for all Events** option is selected. Elastic search provides the following benefits:

- Search results on the Manage Events and Sessions page are displayed faster
- Users can use special characters in the **Event Name** search field on the Manage Events and Sessions page
- Access to event options is now provided through a drop-down menu
- Elastic search provides a more stable search infrastructure

This project is currently in an Open Beta status and is available in **Stage portals only** at this time. It is not available at the start of UAT.



Exclusions

- The **Search for All Sessions** functionality is not included in this beta project.
- Elastic Search does not apply to inactive events.

Implementation

This functionality is automatically enabled in all Stage portals using the Learning module on February 2, 2022.

Beta Guide and Feedback

Click here to access the Beta Guide and updated documents related to this enhancement in the Beta community. You can also share your feedback about this enhancement in the Beta community.

Permissions

The following existing permission applies 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

Event Options Drop-down

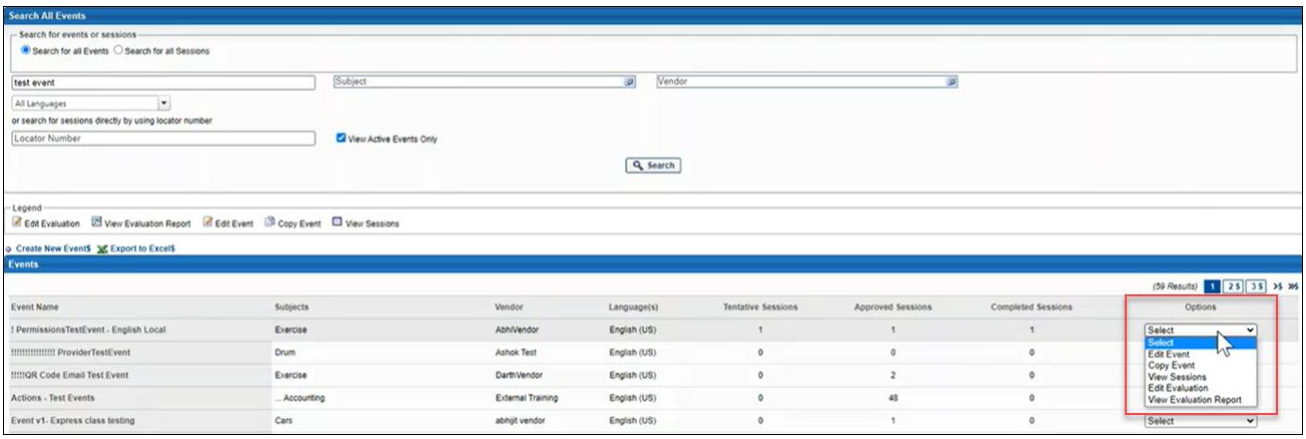
Prior to this enhancement, the options for event management displayed as icons on the Manage Events and Sessions page.

With this enhancement, the options for event management have been relocated to a drop-down menu on the Manage Events and Sessions page. The following options are located in the Options drop-down menu for each event that displays in the search results:

- Edit Event
- Copy Event
- View Sessions
- Edit Evaluation
- View Evaluation Report

The functionality of these options remains unchanged. The only update is the location and display of these options.

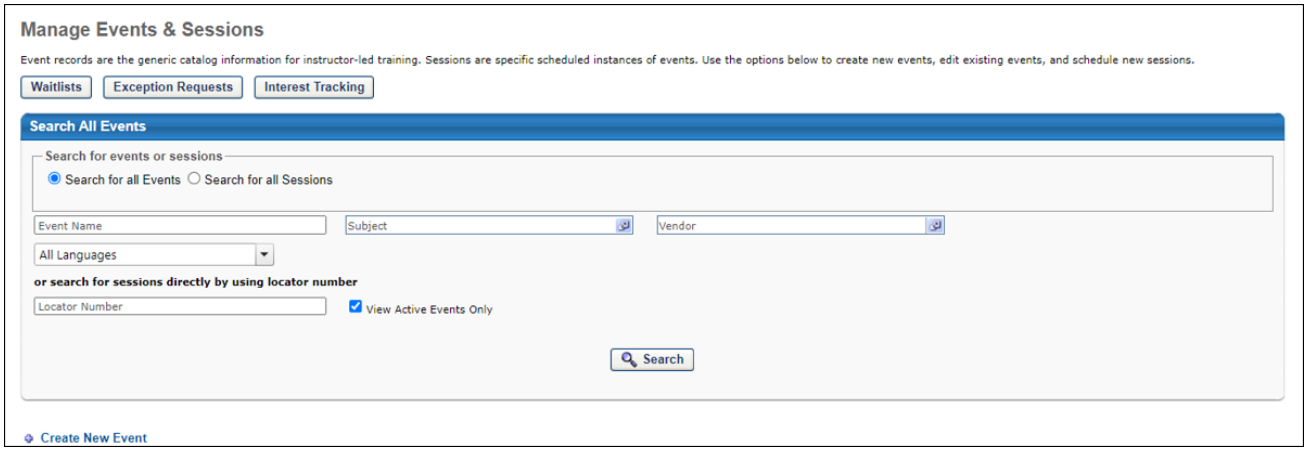
- ***Note:*** *This enhancement does not apply to Search for all Sessions functionality.*



Event List

Prior to this enhancement, when an administrator navigated to the Manage Events and Sessions page, a list of events displayed below the search functionality automatically.

With this enhancement, by default no events are shown on the Manage Events and Sessions page before the administrator performs a search.



Search Behavior and Search Results

Prior to this enhancement, the following behaviors applied to the Search functionality on the Manage Events and Sessions page:

When an administrator searched for a specific term, only exact results were displayed in search results

Special characters were not supported

Searches were performed on Title and Keyword fields.

With this enhancement, the following new behaviors apply to the Search functionality on the Manage Events and Sessions page:

- The search will consider the following fields:
  - Title
  - Description
  - Keywords
- The search will return results on both exact search terms and partial search terms. For example, a search for “Product management” will return all events containing “Product management,” “Product,” or “Management." Results are sorted by relevancy.

Note: *When searching without a search term or using only the Subject, Vendor, or Language dropdowns, the results will not be displayed in alphabetical order.*

Manager Ability to Remove Directly-Assigned Training After Versioning

Manager Ability to Remove Directly-Assigned Training After Versioning

During the October '21 release, the ability for managers to remove training they assigned to a user from the user's transcript was made available. However, if the training the manager had assigned was versioned between when they assigned it and when they attempted to remove the training, it was not possible for the manager to remove the training from the user's transcript.

With the February '22 release, in Stage portals, managers can now remove training they assigned to a user from the user's transcript even if the training was versioned after the manager assigned it, or even if the training has multiple registration numbers since its initial assignment, if all registrations were from the training being directly-assigned or self-requested. If previous registrations were from the Learning Assignment Tool or an administrator assignment, managers will not be able to remove the training.

This enhancement is only available in Stage during the Feb '22 release. This enhancement will be made available in Production and Pilot with the May '22 release.

Exclusions

In some scenarios, there are exclusions to this enhanced behavior. Please note the following scenario and the resulting system behavior:

A manager assigns a training item to a subordinate learner using the Manager Assign feature. An administrator assigns the same training to the learner via the Learning Assignment Tool with the **Maintain Progress** option turned ON.

- Expected Result: Manager should not be able to perform a direct-assigned training removal for this training.
- Actual Result: Manager will be able to perform a direct-assigned training removal for this training.

Implementation

This functionality is automatically available in Stage portals using the Learning module. Access to the ability to remove directly-assigned training is controlled by the *Remove Training - Directly Assigned* permission.

Permissions

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	Universal Profile

	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.*	
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
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 - Administratio n

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. This option is available for directly-assigned training even if the training has been versioned since the learner requested it.

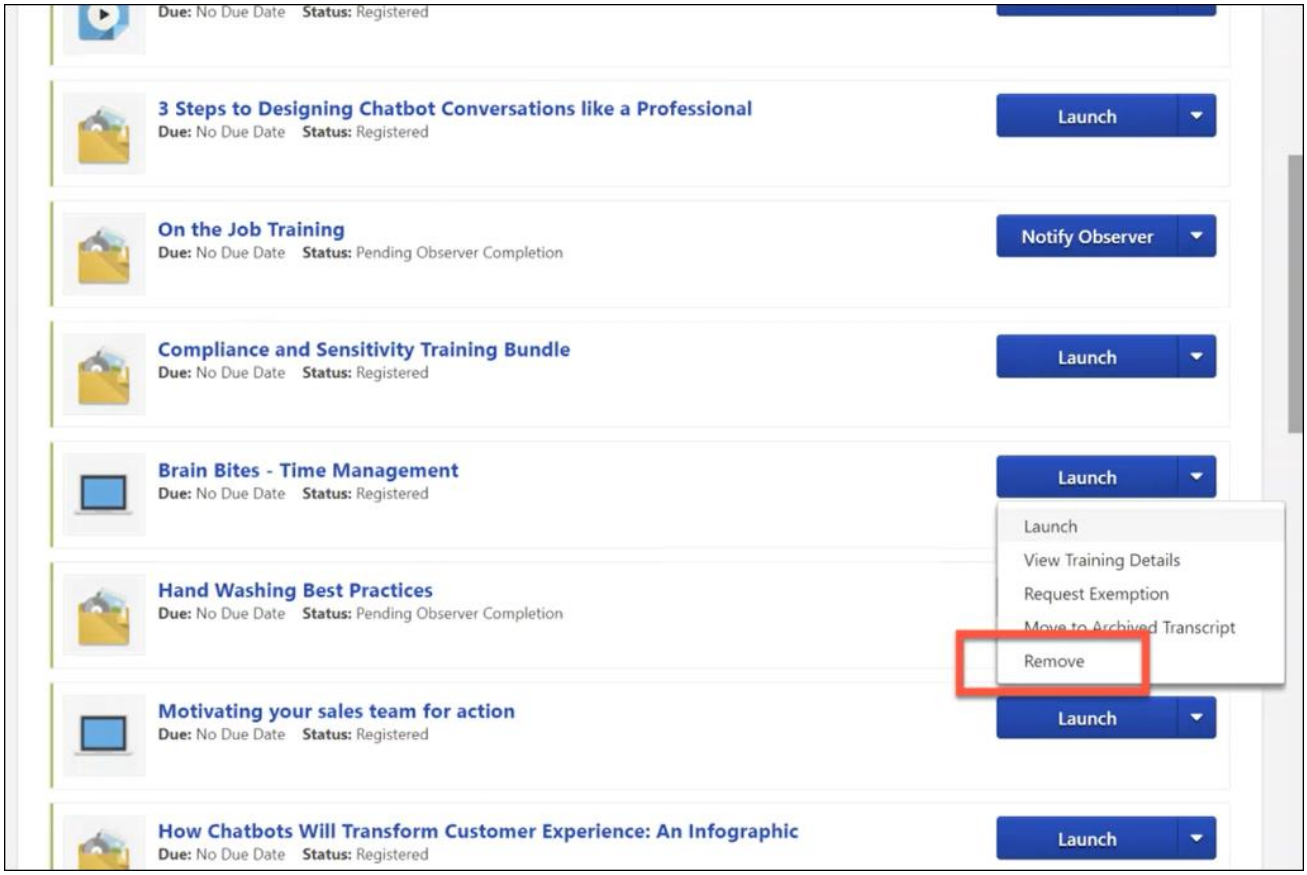
To access a user's Transcript page, go to HOME > UNIVERSAL PROFILE. Click the name of the employee for whom you want to remove training and then navigate to the user's Transcript tab.

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	Learning

	○ User Self and Subordinates ○ 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

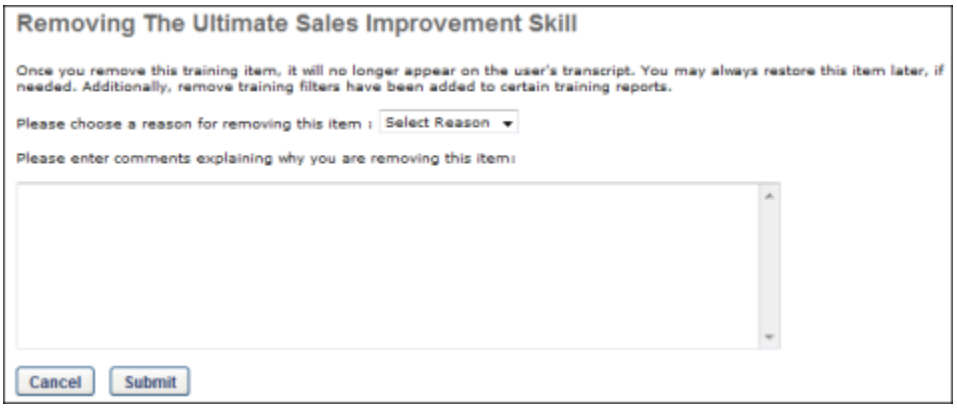


Remove

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.



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

New ILT Preference for Incomplete Session Removal from Transcript

New ILT Preference for Incomplete Session Removal from Transcript

With this enhancement, a new preference option is available on the ILT Preferences page, allowing administrators to decide whether sessions in an Incomplete status retain their Incomplete status when removed from a user's transcript. This option provides more flexibility in how an instructor-led training (ILT) session is removed from transcripts via self-removal, manager removal, or Training Removal Tool job.

Implementation

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

Permissions

The following existing permission applies to this functionality:

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

Configure ILT Preferences - Withdraw Users When Incomplete Sessions are Removed

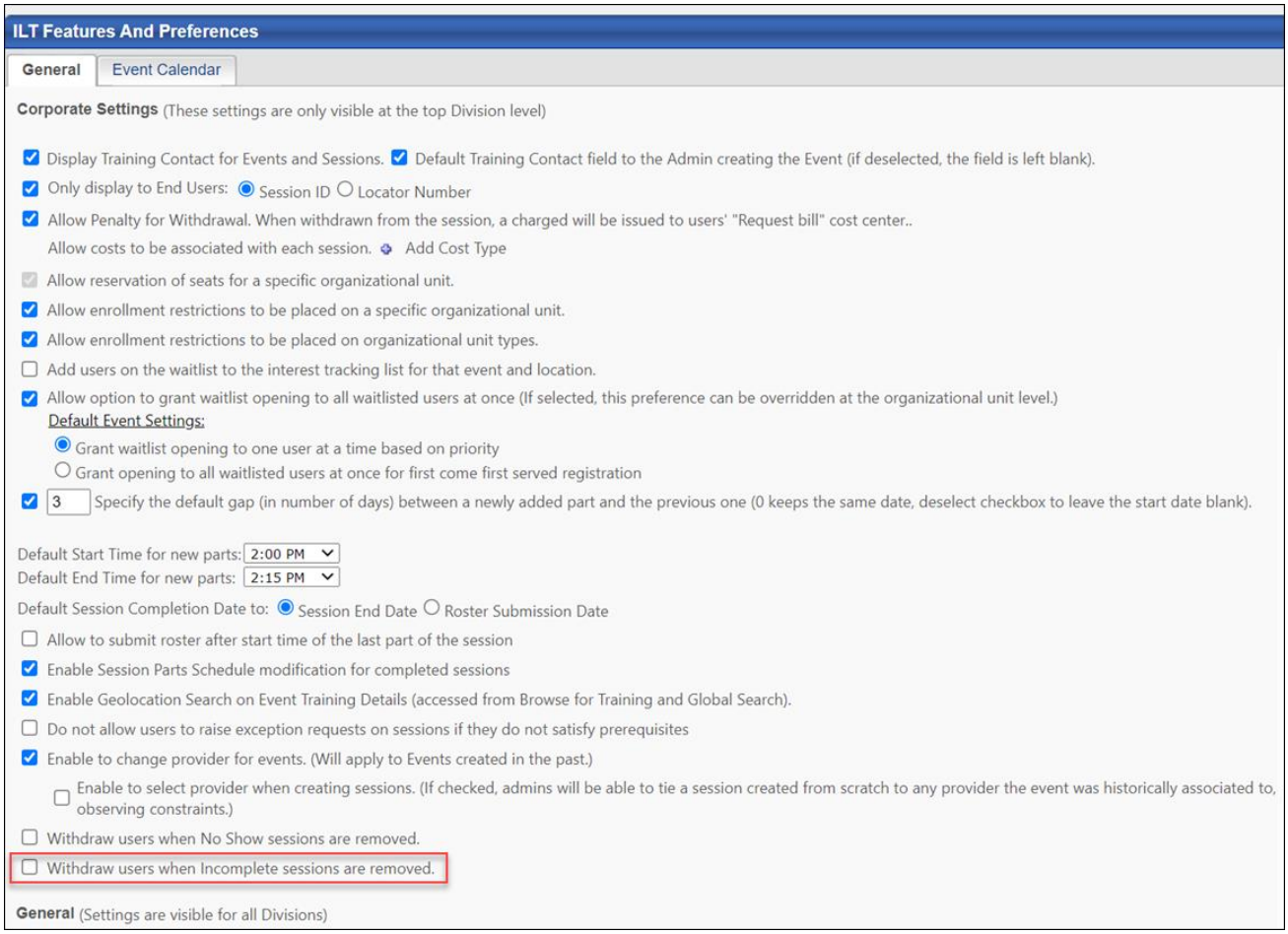
The new **Withdraw users when Incomplete sessions are removed** option is available on the ILT Preferences page, allowing administrators to decide whether sessions in an Incomplete status retain their Incomplete status when removed from a user's transcript.

On the General tab of ILT Preferences, administrators can configure the general default settings for ILT events and sessions.

To configure ILT Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > ILT PREFERENCES.

Permissions

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



Withdraw Users When Incomplete Sessions Are Removed

The administrator can select or unselect the **Withdraw users when Incomplete sessions are removed** option in the Corporate Settings section. This option will be selected by default.

- If the **Withdraw users when Incomplete sessions are removed** option is NOT selected on the ILT Preferences page, the session will be removed from the user's transcript, but the user will not be withdrawn from the session. The session will retain its Incomplete status on the Removed tab of the transcript. ***Note:*** *The Removed tab is not visible to the user.*
- If the **Withdraw users when Incomplete sessions are removed** option IS selected on the ILT Preferences page, the user will be withdrawn from the session and the session will be removed from the user's transcript. The removed session will have a transcript status of Withdrawn and will be moved to the Removed tab of the transcript. ***Note:*** *The Removed tab is not visible to the user.*

After making any changes to the ILT Preferences page, click the **SAVE** button at the bottom of the page to save and apply your settings to the portal.

Use Cases

Use Case #1: Incomplete Sessions option is NOT selected

Acme Corp has unselected the **Withdraw users when Incomplete sessions are removed** option on the ILT Preferences page.

Acme Corp allows all users to remove self-requested training. Jane, an employee, has a scheduling conflict and does not attend multiple parts of a leadership session she requested. Jane only attends one of the session parts, and when the roster is submitted, she is marked as Incomplete for the training. Jane wants to remove the incomplete training from her transcript, so she navigates to her transcript, finds the leadership session, and clicks on the **Options** drop-down. She then selects the **Remove** option to remove the incomplete training.

After this action, Jane's transcript status for the session remains as Incomplete, but the session moves to the Removed tab of her transcript. If an administrator runs a report for this training on Jane's transcript, Jane's status will display as Incomplete for the session. Jane will NOT be removed from the roster of the session.

Use Case #2: Incomplete Sessions option IS selected

Acme Corp has selected the **Withdraw users when Incomplete sessions are removed** option on the ILT Preferences page.

Acme Corp allows all users to remove self-requested training. Jane, an employee, has a scheduling conflict and does not attend multiple parts of a leadership session she requested. Jane only attends one of the session parts, and when the roster is submitted, she is marked as Incomplete for the training. Jane wants to remove the incomplete training from her transcript, so she navigates to her transcript, finds the leadership session, and clicks on the **Options** drop-down. She then selects the **Remove** option to remove the incomplete training.

After this action, Jane is withdrawn from the session and the withdrawn session moves to the Removed tab of her transcript. If an administrator runs a report for this training on Jane's transcript, Jane's status will display as Withdrawn for the session. The Incomplete transcript status is not maintained, and Jane no longer displays on the session roster.

New ILT Preference for No Show Session Removal from Transcript

New ILT Preference for No Show Session Removal from Transcript

With this enhancement, a new preference option is available on the ILT Preferences page, allowing administrators to decide whether sessions in a No Show status retain their No Show status when removed from a user's transcript. This option provides more flexibility in how an instructor-led training (ILT) session is removed from transcripts via self-removal, manager removal, or Training Removal Tool job.

Implementation

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

Permissions

The following existing permission applies to this functionality:

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

Configure ILT Preferences - Withdraw Users When No Show Sessions are Removed

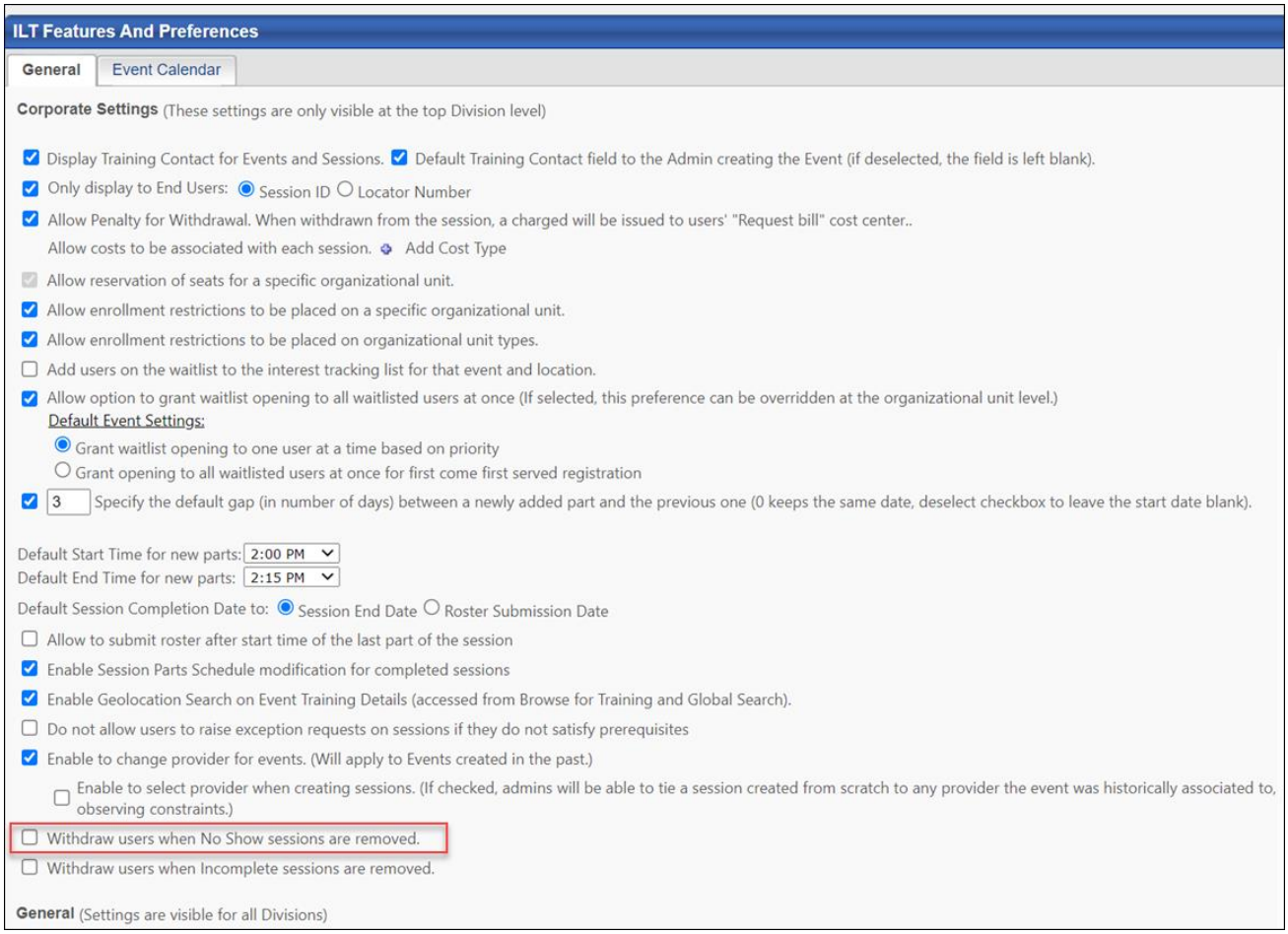
The new **Withdraw users when No Show sessions are removed** option is available on the ILT Preferences page, allowing administrators to decide whether sessions in a No Show status retain their No Show status when removed from a user's transcript.

On the General tab of ILT Preferences, administrators can configure the general default settings for ILT events and sessions.

To configure ILT Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > ILT PREFERENCES.

Permissions

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



Withdraw Users When No Show Sessions Are Removed

The administrator can select or unselect the **Withdraw users when No Show sessions are removed** option in the Corporate Settings section. This option will be selected by default.

- If the **Withdraw users when No Show sessions are removed** option is NOT selected on the ILT Preferences page, the session will be removed from the user's transcript, but the user will not be withdrawn from the session. The session will retain its No Show status on the Removed tab of the transcript. ***Note:*** *The Removed tab is not visible to the user.*
- If the **Withdraw users when No Show sessions are removed** option IS selected on the ILT Preferences page, the user will be withdrawn from the session and the session will be removed from the user's transcript. The removed session will have a transcript status of Withdrawn and will moved to the Removed tab of the transcript. ***Note:*** *The Removed tab is not visible to the user.*

After making any changes to the ILT Preferences page, click the **SAVE** button at the bottom of the page to save and apply your settings to the portal.

Use Cases

Use Case #1: No Show Sessions option is NOT selected

Acme Corp has unselected the **Withdraw users when No Show sessions are removed** option on the ILT Preferences page.

Acme Corp allows all users to remove self-requested training. Sabeen has changed roles and no longer needs to attend a leadership training session that she requested. However, Sabeen forgets to withdraw from the session, and when the roster is submitted, she is marked as a No Show for the training. Since this training no longer applies to her, Sabeen wants to remove the training from her transcript. Sabeen navigates to her transcript, clicks the **Options** drop-down next to the leadership session, and selects the **Remove** option.

After this action, Sabeen's transcript status for the session remains as No Show, but the session moves to her Removed tab of her transcript. If an administrator runs a report for this training on Sabeen's transcript, Sabeen's status will display as No Show for the session. Sabeen will NOT be removed from the roster of the session.

Use Case #2: No Show Sessions option IS selected

Acme Corp has selected the **Withdraw users when No Show sessions are removed** option on the ILT Preferences page.

Acme Corp allows all users to remove self-requested training. Sabeen has changed roles and no longer needs to attend a leadership training session that she requested. However, Sabeen forgets to withdraw from the session, and when the roster is submitted, she is marked as a No Show for the training. Since this training no longer applies to her, Sabeen wants to remove the training from her transcript. Sabeen navigates to her transcript, clicks the **Options** drop-down next to the leadership session, and selects the **Remove** option.

After this action, Sabeen is withdrawn from the session, and the withdrawn session moves to the Removed tab of her transcript. If an administrator runs a report for this training on Sabeen's transcript, Sabeen's status will display as Withdrawn for the session. The No Show transcript status is not maintained, and Sabeen no longer displays on the session roster.

New Payment Processor - NIC Colorado

New Payment Processor - NIC Colorado

Cornerstone's Extended Enterprise product was built on the Cybersource payment gateway, requiring organizations to solely use that service to accept payment for training sold via the Learning Management System (LMS). Additional payment processors have been added over time.

With this enhancement, the new NIC Colorado Payment Gateway has been made available to help support US government customers. This new payment gateway has been implemented to support transactions including:

- Credit card and e-check payment methods
- Tax calculation
- Processing fee calculation, calculated as:
  - Percentage applied over the purchase order total value
  - Fixed value
  - Formula (using the purchase order total value)

Exclusions

The following features are not supported by this integration:

- Recurring billing
- Transactions with 3D Secure
- Partial refunds (only full refunds are supported)
- Save credit card

Considerations

- Only one payment processor may be enabled in a portal at a time, with the exception of the PayPal Payment Processor. The PayPal Payment Processor may be enabled in addition to one other payment processor, such as the NIC Colorado Payment Processor.
- For tax calculation, a Cybersource or CCH account is required. NIC Colorado does not calculate taxes.
- Costs are associated with the creation of a NIC Colorado merchant account, and these fees are charged by NIC Colorado. Cornerstone is not responsible for any costs incurred through NIC Colorado.
- The enablement of the NIC Colorado Payment Gateway within the Cornerstone system has an associated cost. For more details, please contact your Account Manager.

Implementation

For organizations using the Learning module, this integration can be self-enabled via the Edge Marketplace. *See* **NIC Colorado Payment Processor - Enable in Edge** on page 255 *for additional information.*

Please contact NIC Colorado to create a NIC Colorado merchant account.

Edge Guide

Click here for the NIC Colorado Payment Gateway Edge Guide!

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

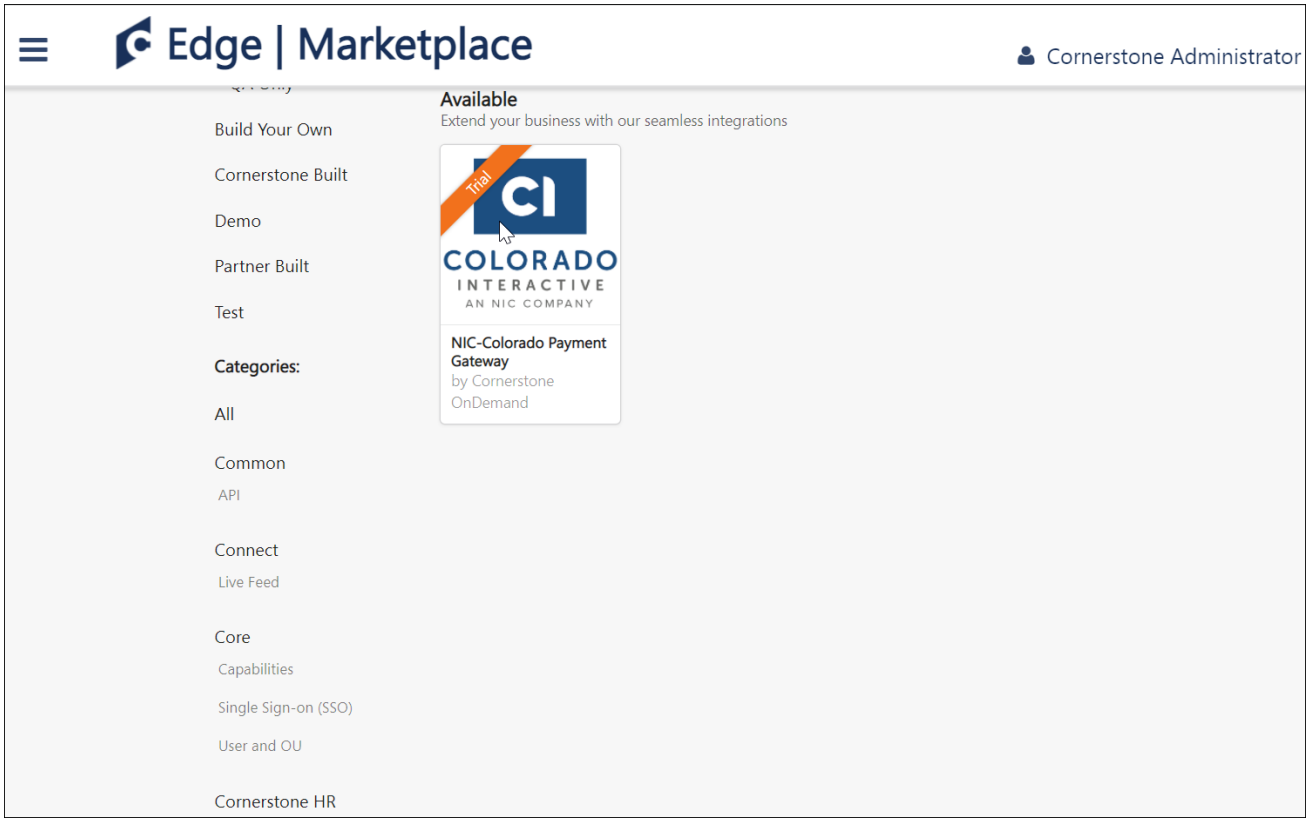
NIC Colorado Payment Processor - Enable in Edge

The NIC Colorado Payment Processor integration can be enabled via the Edge Marketplace.

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

Permissions

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



NIC Colorado - Edge Marketplace

To enable the NIC Colorado Payment Processor:

1. Search for and select the NIC Colorado tile in the Edge Marketplace.
2. Then, click the **INSTALL** button for the NIC Colorado integration.
3. Review the terms and conditions of using the NIC Colorado integration and check the acknowledgment box to confirm that you read, understood, and agree to the terms and conditions.
4. Click the **INSTALL** button. The integration will be installed.
5. Enable the NIC Colorado tile in Edge in order to activate the payment processor. The Active toggle is switched to the Off position by default.

Account details for your NIC Colorado account must be added within the Cornerstone system, via the Define Payment Account page. *See* **NIC Colorado Payment Processor - Define Payment Account** on page 257 *for additional information.*

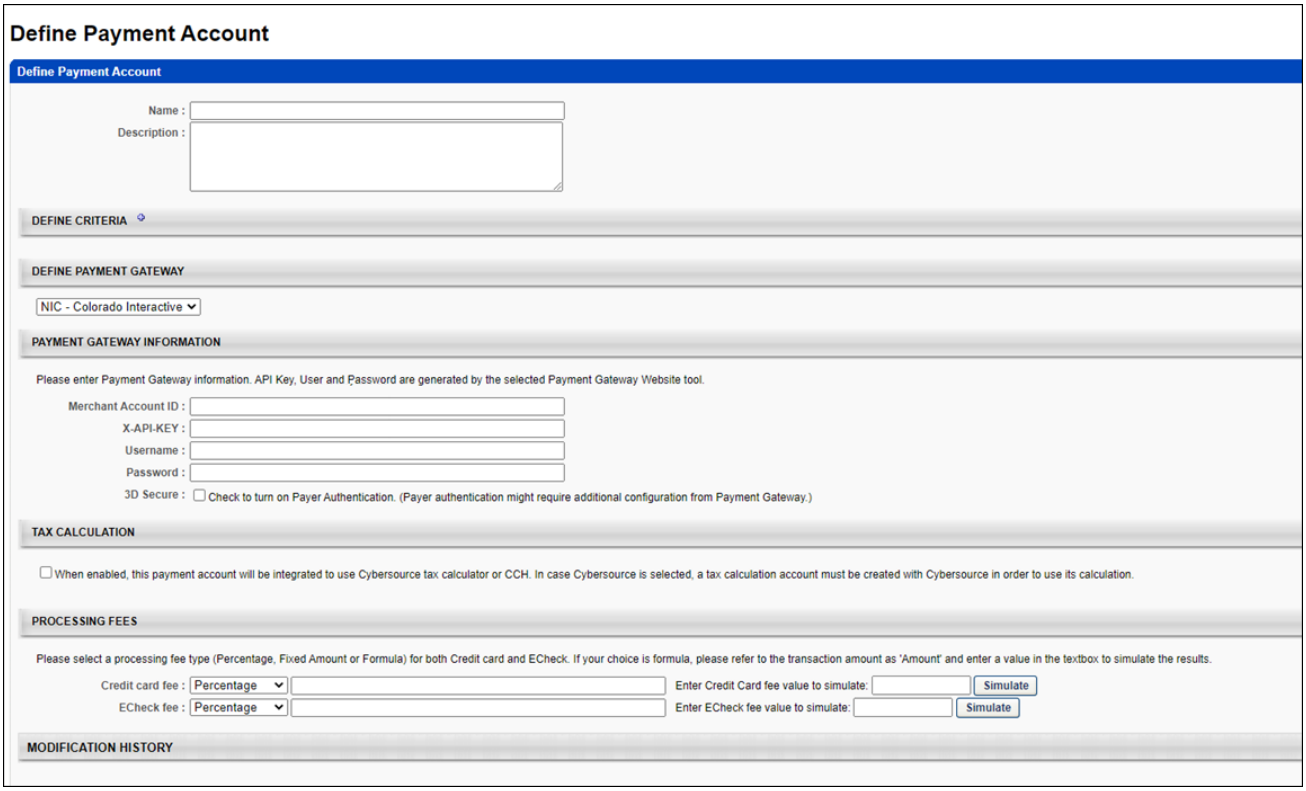
NIC Colorado Payment Processor - Define Payment Account

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

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

Permissions

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



Define Payment Gateway

To define the NIC Colorado Payment Gateway, complete the following steps:

1. In the Define Payment Gateway section, select **NIC Colorado** from the drop-down menu. ***Note:*** *This option is only available if you have enabled the NIC Colorado Payment Gateway via Edge.*

2. Enter the following information for the payment account:
   - **Name** - Character limit is 50.
   - **Description** - This is for administrator use only. It is not displayed anywhere. Character limit is 250.
   - **Define Criteria** - At least one criteria is required and constraints do not apply to the available selections. The available attribute types are:
     - Currency
     - Provider
     - OU
     - LO
3. The remaining fields that the administrator must populate depend on the payment processor selected for the portal. In the Payment Gateway Information section, populate the following fields with the API credentials obtained from NIC Colorado:
   - **Merchant Account ID**
   - **API Key**
   - **Username**
   - **Password**
   - **3D Secure**

Note: *The above fields can be obtained from NIC Colorado after you have created an account with NIC Colorado.*

Save/Cancel

Click **SAVE** to save the payment account. Or, click **CANCEL** to cancel creating the payment account.

New Payment Processor - PayPoint

New Payment Processor - PayPoint

Cornerstone's Extended Enterprise product was built on the Cybersource payment gateway, requiring organizations to solely use that service to accept payment for training sold via the Learning Management System (LMS). Additional payment processors have been added over time.

With this enhancement, the new PayPoint Payment Gateway is available. This new payment gateway has been implemented to support transactions including:

- Credit card and e-check payment methods
- Tax calculation
- Processing fee calculation, calculated as:
  - Percentage applied over the purchase order total value
  - Fixed value
  - Formula (using the purchase order total value)

Exclusions

The following features are not supported by this integration:

- Recurring billing
- Transactions with 3D Secure

Considerations

- Only one payment processor may be enabled in a portal at a time, with the exception of the PayPal Payment Processor. The PayPal Payment Processor may be enabled in addition to one other payment processor, such as the PayPoint Payment Processor.
- For tax calculation, a Cybersource or CCH account is required. PayPoint does not calculate taxes.
- Costs are associated with the creation of a PayPoint merchant account, and these fees are charged by PayPoint. Cornerstone is not responsible for any costs incurred through PayPoint.
- The enablement of the PayPoint Payment Gateway within the Cornerstone system has an associated cost. For more details, please contact your Account Manager.

Implementation

For organizations using the Learning module, this integration can be self-enabled via the Edge Marketplace. *See* **PayPoint - Enable in Edge** on page 262 *for additional information.*

Please contact PayPoint (Fiserv) to create a PayPoint merchant account.

Edge Guide

Click here for the PayPoint Payment Gateway Edge Guide!

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

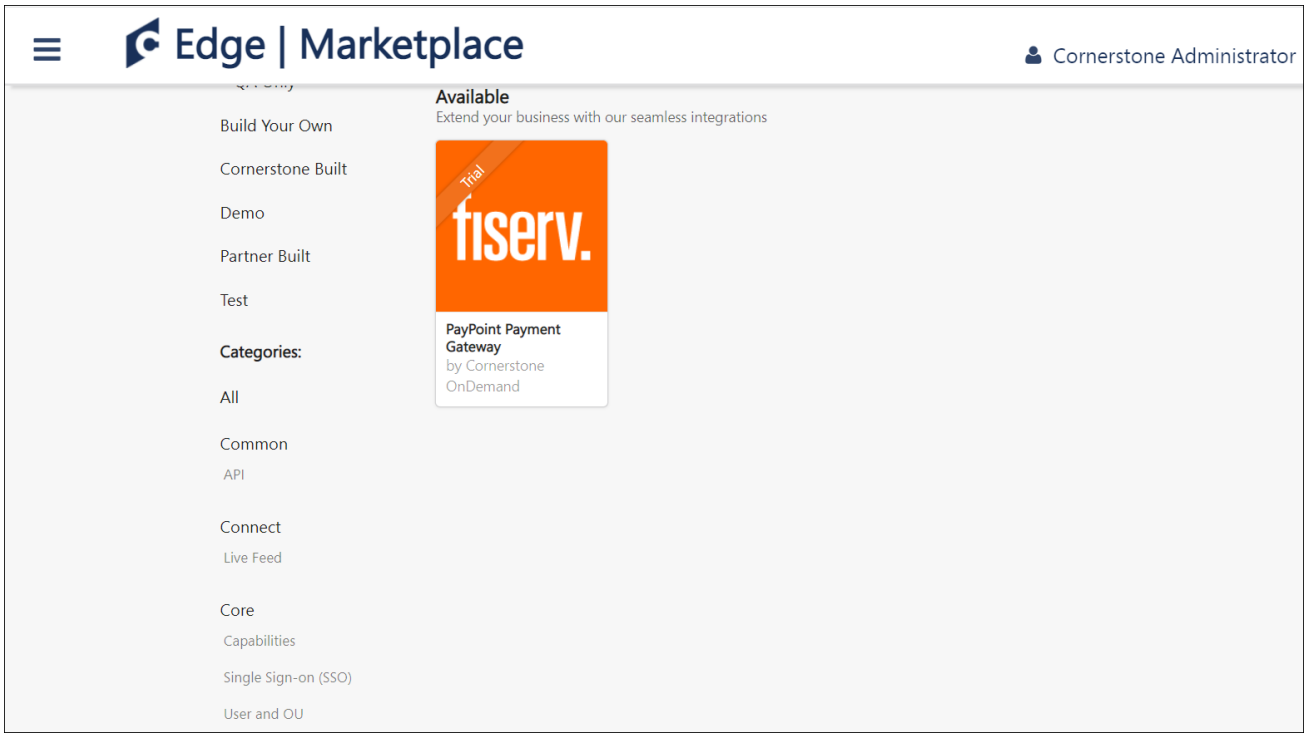
PayPoint - Enable in Edge

The PayPoint Payment Processor integration can be enabled via the Edge Marketplace.

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

Permissions

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



PayPoint - Edge Marketplace

To enable the PayPoint Payment Processor:

1. Search for and select the PayPoint (Fiserv) tile in the Edge Marketplace.
2. Then, click the **INSTALL** button for the PayPoint integration.
3. Review the terms and conditions of using the PayPoint integration and check the acknowledgment box to confirm that you read, understood, and agree to the terms and conditions.
4. Click the **INSTALL** button. The integration will be installed.
5. Enable the PayPoint (Fiserv) tile in Edge in order to activate the payment processor. The Active toggle is switched to the Off position by default.

Account details for your PayPoint account must be added within the Cornerstone system, via the Define Payment Account page. *See* **PayPoint - Define Payment Account** on page 264 *for additional information.*

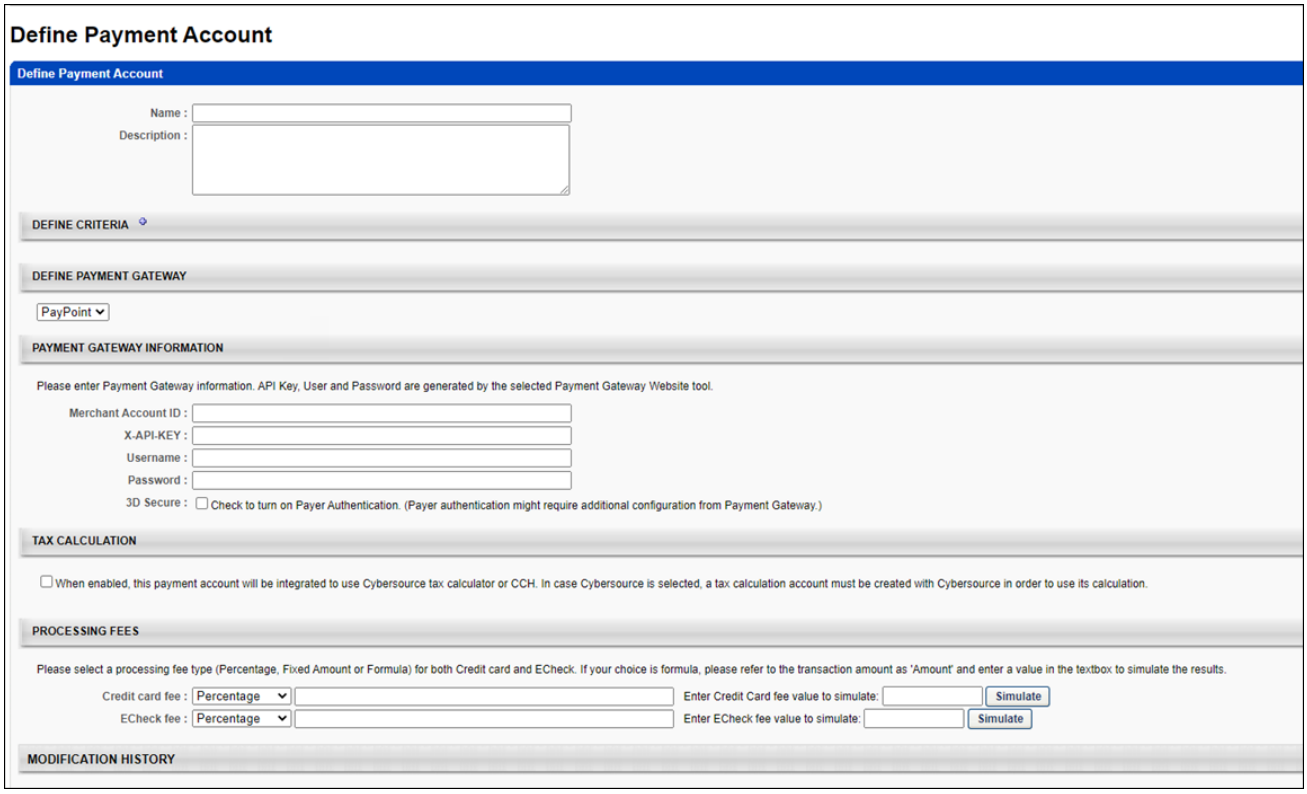
PayPoint - Define Payment Account

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

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

Permissions

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



Define Payment Gateway

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

1. In the Define Payment Gateway section, select **PayPoint** from the drop-down menu.
   Note: *This option is only available if you have enabled the PayPoint Payment Gateway via Edge.*

2. Enter the following information for the payment account:
   - **Name** - Character limit is 50.
   - **Description** - This is for administrator use only. It is not displayed anywhere. Character limit is 250.
   - **Define Criteria** - At least one criteria is required and constraints do not apply to the available selections. The available attribute types are:
     - Currency
     - Provider
     - OU
     - LO
3. The remaining fields that the administrator must populate depend on the payment processor selected for the portal. In the Payment Gateway Information section, populate the Payment Gateway information with the API credentials obtained from PayPoint.

Note: *These fields can be obtained from PayPoint after you have created an account with PayPoint.*

Save/Cancel

Click **SAVE** to save the payment account. Or, click **CANCEL** to cancel creating the payment account.

Reassigned Child Training Remains Completed in Completed Curriculum

Prior to this enhancement, if a training item within a curriculum was already completed by the user, and then the training item was reassigned to the user with the **New Occurrence** option enabled and the **Maintain Progress** option disabled for the assignment, the user's status for the child training item would be updated to Registered within the curriculum even though the curriculum status was Completed.

With this enhancement, completions of child training items will remain in a Completed status within completed curricula even if one of the child training items is reassigned to the user separately.

Use Cases

Use Case #1:

1. An administrator created a curriculum called "Security Essentials" which contains a child training item called "Security 101" and a child training item called "Security 201." The administrator enabled the **Recurrence** setting for the child training item "Security 101."
2. The Security Essentials curriculum is assigned to a user named Adam, who completes the curriculum. The child training items inside the curriculum, Security 101 and Security 201, display a Completed status on Adam's transcript.
3. Later, the training item "Security 101 is assigned to Adam again with the **Assign New Occurrence** setting enabled and the **Maintain Progress** setting disabled for the assignment.
4. On Adam's Transcript page for the Security Essentials curriculum, the status of the curriculum is Completed, and the status of the child training item Security 101 remains in a Completed status even though Security 101 was assigned to him again as a new occurrence.

Use Case #2:

An administrator created a curriculum called "Security Essentials" which contains a child training item called "Security 101" and a child training item called "Security 201." The administrator enabled the Recurrence setting for the child training item "Security 101."

The administrator creates another curriculum called "Business Ethics" which contains a child training item called "Ethics 101" and "Security 101", with the **Recurrence** setting enabled for Ethics 101.

The Security Essentials curriculum is assigned to a user named Uzair, who completes the curriculum. The child training items inside the curriculum, Security 101 and Security 201, display a Completed status on Uzair's transcript.

Later, Uzair is also assigned the Business Ethics curriculum, with the **Assign New Occurrence** setting enabled and the **Maintain Progress** setting disabled for the assignment. The Business Ethics curriculum contains the child training item Security 101, which is also a child training item contained in the Security Essentials curriculum that Uzair completed previously.

On Uzair's Transcript page for the Security Essentials curriculum, the status of the curriculum is Completed, and the status of the child training item Security 101 remains in a Completed status even though Security 101 was assigned to him within another curriculum.

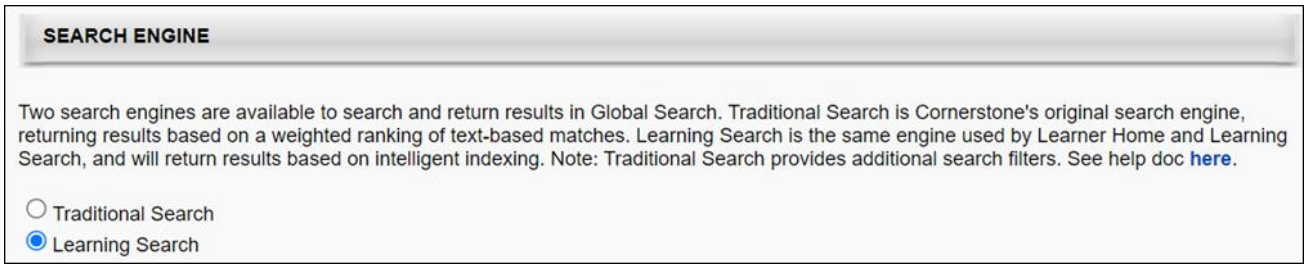
Implementation

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

Remove "Search Engine" Search Preference

After the release of Learning Search (elastic search), clients could choose to run their portal's Global Search for training functionality with either Traditional Search (the legacy SQL search engine) or Learning Search. These search engine options were configurable via Search Preferences.

With the Feb '22 Release, the configuration options to select between Global Search and Learning Search are removed from the Search Preferences page. If the Traditional Search option was selected on the Search Preferences page prior to this preference removal enhancement, that preference will continue to be preserved in the portal until the portal is migrated to the Learning Search engine. Clients will be notified at least three weeks in advance of their portals' migration to Learning Search. For portals already using Learning Search, no migration will occur.



- For information about the differences between Learning Search and Traditional Search: *See Learning Search vs. Traditional Search.*
- For more information about Search Preferences: *See Search Preferences - Training.*

Exclusions

All the search filters available with Traditional Search are not currently available for Learning Search. The following filters are NOT supported by Learning Search:

- Course Code
- Instructor
- Pricing
- Date Range
- Location
- Subscription
- Skills
- Credits
- Competency
- Filters created from custom fields

The following filters ARE available in Learning Search:

- Training Type
- Duration
- Modality (not available in Traditional Search)

- Subject
- Provider
- Language
- Mobile Enabled (not available in Traditional Search)

Implementation

This update to Search Preferences will be applied to all portals using the Learning module. There will be no change in system behavior for portals already using Learning Search. Portals using Traditional Search will be gradually migrated to Learning Search as Traditional Search is deprecated, but clients will be notified via email three weeks prior to their portal's migration to Learning Search. With the Feb '22 Release, the ONLY change to portals still using Traditional Search is the removal of the search engine preference options.

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Global Search Preferences - Manage	Grants ability to configure Global Search Preferences. This is an administrator permission. The availability of this permission is controlled by a backend setting. This permission can be constrained by OU and User's OU. By default, this permission is constrained to the organization.	Core Administration

Reporting Fields - Learning

With the February '22 Release, the following enhancements have been made to Reporting 2.0:

Updated Fields

With this enhancement, the following existing Learning fields have been updated:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Curriculum Child Training Transcript Status	This field displays the user's transcript status for child training items within a curriculum. ○ Prior to this enhancement, Reporting 2.0 did not always reflect the same transcript status that was visible on the curriculum transcript page for a child training item within the context of the curriculum. This occurred when the child training had multiple due dates because it existed in more than one place in the learner's transcript, such as in another curriculum. ○ With this enhancement, Reporting 2.0 will reflect the same child training transcript status that is visible on the learner's curriculum transcript page. For more information about this updated system behavior: *See* **Improved Experience When Viewing Child Training with Due Dates in the Curriculum Transcript** on page 214 *for additional information.*	Text
Latest Curriculum Version?	This field displays a yes/no value, indicating whether or not the curriculum is the latest version. ○ Prior to this enhancement, this field was only available in the Curriculum Training report in Reporting 2.0. ○ With this enhancement, this field is also available in the Curriculum Transcript report.	Yes/No
User's Course Rating Date	This field indicates the date the user submitted a course rating. ○ Prior to this enhancement, the output of this field displayed in UTC (coordinated universal time) instead of in the user's local time zone. ○ With this enhancement, the output of this field displays in the user's local time zone. This allows the report output to be	Date

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
	consistent with the information that displays in the system for the user.	

New Fields

With this enhancement, the following new Learning fields have been added to the Transcript section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Last Accessed	This field displays the date a training item was last accessed by a specific user.	Date
Total Views	This field displays the total number of times a specific user viewed a training item.	Numeric
User Full Name	This is the full name of the user who removed the training.	Text
User ID	This is the system User ID of the user who removed the training.	Text

With this enhancement, the following new Learning fields have been added to the Training > Vendor section of Reporting 2.0:

FIELD NAME	FIELD DESCRIPTION	FIELD TYPE
Vendor Name	This field displays the name of the training vendor.	Text
Vendor Active	This field displays whether a vendor is active.	Text
Instructor Active for Vendor	This field displays whether an instructor is active.	Text
Instructor Email	This field displays the instructor's email.	Text
Location	This field displays the instructor's location.	Text
Instructor Name	This field displays the full name of the instructor (first name and last name).	Text
Instructor First Name	This field displays the instructor's first name.	Text
Instructor Last Name	This field displays the instructor's last name.	Text

Implementation

This enhancements are all automatically available in all portals using the Learning module. These enhancements are enabled by default, with the exception of the enhancements made to the Curriculum Child Training Transcript Status field. In order to activate the enhancements to the Curriculum Child Training Transcript Status field, the functionality must be enabled via the Learning Feature Activation page in Learning Preferences. For more information about enabling this functionality: *See* **Learning Feature Activation** on page 217 *for additional information.*

"Session Changed" Email and Other Enhancements

Prior to this enhancement, the Session Changed email could be configured with or without the following conditions:

- Current Registration
- Max Registration
- Min Registration
- No Show Penalty Changed
- Price Changed
- Schedules Changed

With this enhancement, the Session Changed email will trigger after the session start date for current or future parts, when using a part-specific condition (only the condition TIMETABLE.CHANGED is a part-related condition). When using no condition or a session-related condition, the email will also trigger after the session start date if the last part is not yet completed.

Also with this enhancement, the following additional conditions can be configured for the Session Changed email, to provide greater control over when the email is triggered:

- **Timetable Changed** (TIMETABLE.CHANGED) - This condition is triggered by changes to any of the following:
  - Location
  - Start and End Dates
  - Start and End Times
  - Time Zone
  - Part Created
  - Part Removed
- **Instructors Changed** (INSTRUCTOR.CHANGED) - This condition is triggered by changes to any of the following:
  - Adding an instructor to a part
  - Removing an instructor from a part
- **Pre-/Post-Training Changed** (PRE.POST.TRAINING.CHANGED) - This condition is triggered by changes to any of the following:
  - Pre- or post-work is added to a session
  - Pre- or post-work is removed from a session
  - Pre- or post-work is made mandatory

  In addition, the following two new tags have been made available:

  - SESSION.CHANGE.DETAILS - Using this tag in the body of the email inserts a table showing all changes made to current and future session parts, using the same structure as the existing SCHEDULES.DETAILS tag.
  - SESSION.CHANGE.DETAILS.INSTRUCTOR - Using this tag in the body of the email inserts a table showing all changes to current and future session parts, including instructor changes.

Finally, as an additional part of this enhancement, the on-screen instructions upon modifying pre- or post-work have been made clearer to increase administrator understanding that this change will be communicated to recipients of the email. The description of the COMMENTS tag has also been adjusted to reflect that it refers to changes made to the pre- and post-work.

Exclusions

The following exclusions apply to this enhancement:

- Email recipients do not change (i.e., the email cannot be triggered for instructors that have been removed from all session parts).
- The format of the tags SESSION.CHANGE.DETAILS and SESSION.CHANGE.DETAILS.INSTRUCTOR cannot be modified.
- There are no version highlighting changes for the tags SCHEDULES and SCHEDULES.HTML.
- The email is session-based, not part-based. This means:
  - For emails configured as a meeting invitation, there will be as many emails as there are parts, AND the emails will be sent for all parts, including past and non-modified parts.
  - For emails configured with a calendar attachment, there will be ical attachments included for all parts, including past and non-modified parts.
  - There is no specific condition for waitlist deadline changes.
  - Auditing functionality related to session changes is not being enhanced as part of this project.

Implementation

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

Quick Configuration Guide

The following email configuration guide is intended as a suggestion only. Organizations should assess their individual needs before making changes to their emails.

It is recommended that administrators replace any existing emails, rather than simply adding new emails. If new emails are added without replacing existing emails, learners will receive two sets of emails.

Email #1:

- Recipients: Registered students
- Condition: Timetable change
- Tag: SESSION.CHANGE.DETAILS or SESSION.CHANGE.DETAILS.INSTRUCTORS

Email #2:

- Recipients: Session instructors
- Condition: Timetable change AND instructor changed

- Tag: SESSION.CHANGE.DETAILS.INSTRUCTORS

Email #3:

- Recipient: Registered students
- Condition: Pre or post-work change
- Tag: COMMENTS

Knowledge Article and Configuration Guide

Click here to access a Knowledge article and configuration guide for this enhancement in Support Central!

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Emails by Learning Object - Manage	Grants access to create, edit and delete custom email templates/triggers at the learning object level. When viewing Course Console, this permission also grants ability to view and manage email triggers at the LO level. This permission works in conjunction with the Course Catalog - Update and Course Catalog - View permissions. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. This is an administrator permission.	Learning - Administration
Global Email Administration - Manage	Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission.	Core Administration

SF-182 Form Enhancements

SF-182 Form Enhancements

With the Feb '22 Release, the SF-182 form functionality available in the Cornerstone system has been enhanced with sections D, E, and F to ensure it meets all SF-182 form requirements. The following enhancements are included:

- Pre-training approval workflows can be configured to support Section D and E
- The ability to add groups as approvers in the pre-training approval workflow has been added
- The ability to print Section D, E and F on the SF-182 form has been added
- The Training Details page displays Section D, E and F
- The ability to copy an SF-182 form from a learner's transcript has been added
- Copy logic on the SF-182 Request Administration page has been enhanced so that the copied SF-182 form includes the original users
- Cosmetic changes have been made to ensure the Cornerstone SF-182 form matches the current SF-182 format

Considerations

For SF-182 forms that are in progress with the Feb '22 release, sections D, E, and F will be visible on the form, and any approvers configured for steps 1, 2, and 3 will display in Section D (1a-3a) and Section E (1a). Any completion approval will display in Section F.

Implementation

These enhancements are enabled by default for all portals using SF-182 form functionality. ***Note:*** *The new permission which grants users the ability to copy SF-182 forms is automatically added to the System Administrator security role, but it must be added to any other security role that should have this ability.*

If your organization is NOT ready to implement this new functionality, please open a case with Global Customer Support.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Copy SF-182 Training from Transcript	This permission allows users to copy an SF-182 form from their transcript. Users with this permission will see a **Copy SF-182** option in the **Options** drop-down menu for SF-182 forms on their transcript. This permission can be constrained by Restrict to User Self and Subordinates, User Self, or User's Direct Subordinates.	Learning

	If you wish to leverage this permission, please reach out to Global Customer Support and ask for the *Copy SF-182 Training From Transcript* feature to be enabled).	

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Set SF-182 Preferences	Grants ability to configure SF-182 preferences for standard fields, approvers and reasons. (Governmental clients). This is an administrator permission.	Limited Use/Obsolete
SF-182 Administration	Grants ability to view SF-182 requests for populations of users (based on constraints), approve SF-182 forms at any step of the process, and view the link for managing SF-182 specific vendors for their organization. (Governmental clients). This is an administrator permission.	Limited Use/Obsolete
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

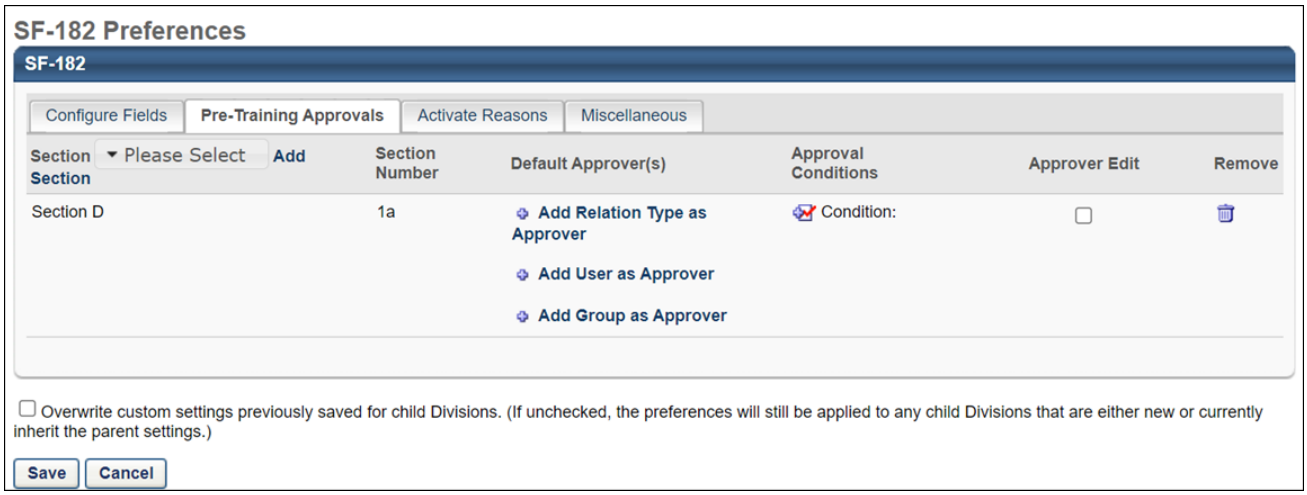
SF-182 Add Groups as Approvers

The SF-182 Preferences page enables administrators to configure preferences for the SF-182 functionality. With this enhancement, it is now possible to add groups as approvers for SF-182 form pre-training approvals via the SF-182 Preferences page.

To access SF-182 Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES. Then, click the **Set SF-182 Preferences** link and choose the division for which you wish to configure preferences. To set approvers, click the Pre-Training Approvals tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Set SF-182 Preferences	Grants ability to configure SF-182 preferences for standard fields, approvers and reasons. (Governmental clients). This is an administrator permission.	Limited Use/Obsolete



Default Approvers

The options in the Default Approvers column allow you to configure approvers for the step. You can add relation types, users, and groups as approvers for a step. To add a group as an approver:

1. Click the **Add Group as Approver** link for the relevant step. This opens the Select Approvers pop-up window.
2. Click the Add icon in the Add column for each group you would like to add.
3. Click the **ADD** button.

The group(s) you selected will be added as approvers for the step. Any user in the group can approve the step.

- ***Note:*** *There is no limit on the number of users in groups or the number of groups that can be added, but only up to 100 users will display in the Training Details for Sections D and E.*
- ***Note:*** *Only users that were part of the group at the time of the form submission will be added as approvers for the form. Users added to the group after form submission are NOT automatically added as approvers.*

For more information about SF-182 Preferences: *See Set SF-182 Preferences - Set Approvals.*

SF-182 Pre Training Approvals

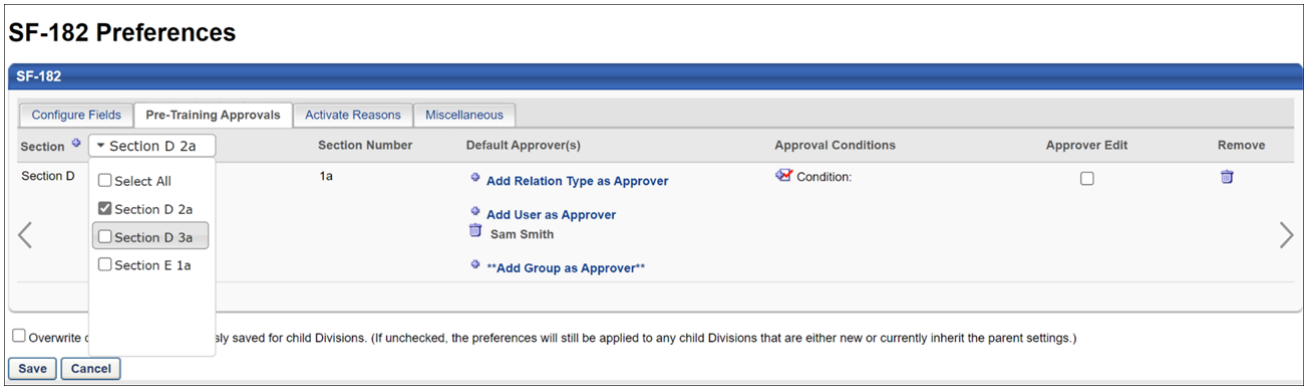
Prior to this enhancement, the printable SF-182 form contained a generic approvers section.

With this enhancement, administrators can configure the approvals for Section D and E via SF-182 Preferences. The Set Approvals tab name has been changed to Pre-Training Approvals and will continue to respect the division hierarchy.

To access SF-182 Preferences, go to ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES. Then, click the **Set SF-182 Preferences** link and choose the division for which you wish to configure preferences. To set approvers, click the Pre-Training Approvals tab.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Set SF-182 Preferences	Grants ability to configure SF-182 preferences for standard fields, approvers and reasons. (Governmental clients). This is an administrator permission.	Limited Use/Obsolete



Section D

Section D allows for the printing of the following fields:

- Full name
- Title
- Email address
- Phone
- Approval date
- Signature box with full name displayed

Approvers can be set for Section D-1a, Section D-2a, and Section D-3a. These approver selections determine the approvers who will be printed on the form for those sections.

Section E

Section E allows for the printing of the following fields:

- Full name
- Title
- Email address
- Phone
- Approval date
- Signature box with full name displayed

Approvers can be set for Section E-1a. This approver selection determines the approvers who will be printed on the form for Section E-1a.

Section D – Approvals Complete the appropriate number of approvals your agency requires (e.g. first, second ,and/or third level approval) before submission of this form to the Agency Training Office.	
1a. Immediate Supervisor/First-line Supervisor (Name and Title) Isabella Ross	
1b. Telephone Number (Include Area Code and Extension)	1c. Email Address
1d. Signature Isabella Ross	1e. Date (Enter Date as yyyy-mm-dd) 2021-12-20
2a. Second-line Supervisor (Name and Title) Carl Corbin	
2b. Telephone Number (Include Area Code and Extension)	2c. Email Address
2d. Signature Carl Corbin	2e. Date (Enter Date as yyyy-mm-dd) 2021-12-20
3a. Training Officer (Name and Title) Ava Cooper	
3b. Telephone Number (Include Area Code and Extension)	3c. Email Address
3d. Signature Ava Cooper	3e. Date (Enter Date as yyyy-mm-dd) 2021-12-20
Section E – Approvals/Concurrence To be completed by the nominating Agency Official authorized to approve or disapprove training requests.	
1a. Authorizing Official (Name and Title) Ava Cooper	
1b. Telephone Number (Include Area Code and Extension)	1c. Email Address
1d. Signature Ava Cooper	1e. Date 2021-12-20
Section F – Certification of Training Completion and Evaluation*	
1a. Authorizing Official (Name and Title)	
1b. Telephone Number (Include Area Code and Extension)	1c. Email Address
1d. Signature	1e. Date
Training Facility: Bills should be sent to office indicated in item C6. Please refer to number given in item C4 to assure prompt payment	
* Agency Certifying Officials are certifying the employee has completed the requirements for the training and an evaluation has been completed. The requirement to evaluate training is found in 5 CFR 410.202. The agency head shall evaluate training to determine how well it meets short and long-range program needs of the agency and the individual. The needs should be aligned with the strategic plan to strengthen and develop the performance and behavior of the individual whose positive results will impact the performance of the agency.	

Considerations

- If multiple approvers are specified for a section, then the first person to approve is recorded as the approver for the matching box on the SF-182 form.

- The administrator is not required to configure an approver for every section. The administrator can opt to only configure the sections that are needed, and only the sections they configured will print on the form when approved.
- If any approver for any of the configured sections denies the SF-182 approval request, the approval workflow will stop and the first and last name of the approver who denied the request will display on the form with "(Denied)" next to their name. If there are previous approvers before the form is denied these will print on the form as First Name, Last Name.

Exclusions

Previously, steps 1-5 were configurable for the pre-training workflow. With this enhancement, only four steps are configurable (Section D 1a-3a and Section E-1a), and any step 5 workflows will not be used.

SF-182 Post Training Approvals

Post-training (completion) approvals can be configured via the Default Approval Workflow Templates page and the Default Approval Requirements for External Training page. The first approver who approves will now display in Section F on SF-182 forms.

F allows for the printing of the following fields:

- Full name
- Title
- Email address
- Phone
- Approval date
- Signature box with full name displayed

Section D – Approvals Complete the appropriate number of approvals your agency requires (e.g. first, second ,and/or third level approval) before submission of this form to the Agency Training Office.	
1a. Immediate Supervisor/First-line Supervisor (Name and Title) Isabella Ross	
1b. Telephone Number (Include Area Code and Extension)	1c. Email Address
1d. Signature Isabella Ross	1e. Date (Enter Date as yyyy-mm-dd) 2021-12-20
2a. Second-line Supervisor (Name and Title) Carl Corbin	
2b. Telephone Number (Include Area Code and Extension)	2c. Email Address
2d. Signature Carl Corbin	2e. Date (Enter Date as yyyy-mm-dd) 2021-12-20
3a. Training Officer (Name and Title) Ava Cooper	
3b. Telephone Number (Include Area Code and Extension)	3c. Email Address
3d. Signature Ava Cooper	3e. Date (Enter Date as yyyy-mm-dd) 2021-12-20
Section E – Approvals/Concurrence To be completed by the nominating Agency Official authorized to approve or disapprove training requests.	
1a. Authorizing Official (Name and Title) Ava Cooper	
1b. Telephone Number (Include Area Code and Extension)	1c. Email Address
1d. Signature Ava Cooper	1e. Date 2021-12-20
Section F – Certification of Training Completion and Evaluation*	
1a. Authorizing Official (Name and Title)	
1b. Telephone Number (Include Area Code and Extension)	1c. Email Address
1d. Signature	1e. Date
Training Facility: Bills should be sent to office indicated in item C6. Please refer to number given in item C4 to assure prompt payment	
* Agency Certifying Officials are certifying the employee has completed the requirements for the training and an evaluation has been completed. The requirement to evaluate training is found in 5 CFR 410.202. The agency head shall evaluate training to determine how well it meets short and long-range program needs of the agency and the individual. The needs should be aligned with the strategic plan to strengthen and develop the performance and behavior of the individual whose positive results will impact the performance of the agency.	

SF-182 Form - Copy

With this enhancement, users can be granted the ability to copy SF-182 forms from their transcript.

If you wish to leverage this functionality, please reach out to Global Customer Support and ask for the *Copy SF-182 Training From Transcript* feature to be enabled).

- To access your transcript, go to LEARNING > VIEW YOUR TRANSCRIPT.
- To access a user's Transcript page, go to HOME > UNIVERSAL PROFILE. Click the name of an employee 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
Copy SF-182 Training from Transcript	This permission allows users to copy an SF-182 form from their transcript. Users with this permission will see a **Copy SF-182** option in the **Options** drop-down menu for SF-182 forms on their transcript. This permission can be constrained by Restrict to User Self and Subordinates, User Self, or User's Direct Subordinates. If you wish to leverage this permission, please reach out to Global Customer Support and ask for the *Copy*	Learning

	SF-182 Training From Transcript feature to be enabled).	
SF-182 Administration	Grants ability to view SF-182 requests for populations of users (based on constraints), approve SF-182 forms at any step of the process, and view the link for managing SF-182 specific vendors for their organization. (Governmental clients). This is an administrator permission.	Limited Use/Obsolete
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

Copy SF-182 Form from Transcript

To copy an SF-182 form, locate the SF-182 form on the transcript and click the Options drop-down to the right of the form. Then, click the **Copy SF-182 Form** link in the drop-down menu.

- ***Note:*** *Draft forms cannot be copied.*
- ***Note:*** *When a user copies an SF-182 form from their transcript, they will be the only user included in the copy, even if the original form included multiple users.*

SF-182 Request Management - Copy Functionality

For administrators, copy functionality has been expanded to keep the original users that were added to the original form on copy. For example, if there were ten users on the original form and the form is copied, all ten users will be included on the copied form.

SF-182 Cosmetic Changes

The following cosmetic updates have been made to SF-182 forms to improve the user experience:

- The SF-182 form section titles are updated to mixed-case to match the current OPM SF-182 form.
- When printed as a PDF, the SF-182 form will print Sections A to C on page 1 and Sections D to F on page 2.
- In section B, the vendor website and vendor point of contact are capturable in Vendor Details and are printable on the form.
- In section B, the following new fields have been added:
  - Field 18 - Individual or Group Training
  - Field 19 - Student
- The membership ID is capturable and printable on the form.
- In Section B,the Training Objective fields has been replaced with Field 20: Skill Learning Objective
- The SF-182 printable form displays text that is in parenthesis in italics after the following fields on the form:
  - Section A - Applicant name, date of birth, home address, home telephone, organization mailing address
  - Section B - Name and mailing address of training vendor, training start date, training end date, continued service agreement expiration date
  - Section D - Immediate supervisor, any dates, second line supervisor, any telephone numbers
  - Section E - authorizing official, telephone number
  - Section F - authorizing official, telephone number

Support for Online Content in Training Update Tool

With the February ’22 Release, administrators can use the Training Update Tool to update online content training in bulk on learner transcripts.

This enhancement is available for user acceptance testing as of the February 8 stage deployment.

Considerations

The online content training type is for third party online content delivered through a subscription but hosted on the provider's servers. ***Note:*** *Currently the online content training type is only available for clients who have purchased subscriptions such as Content Anytime, or content integrations, such as Skillsoft Percipio, Coursera for Business, or edX for Business.*

Implementation

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

Permissions

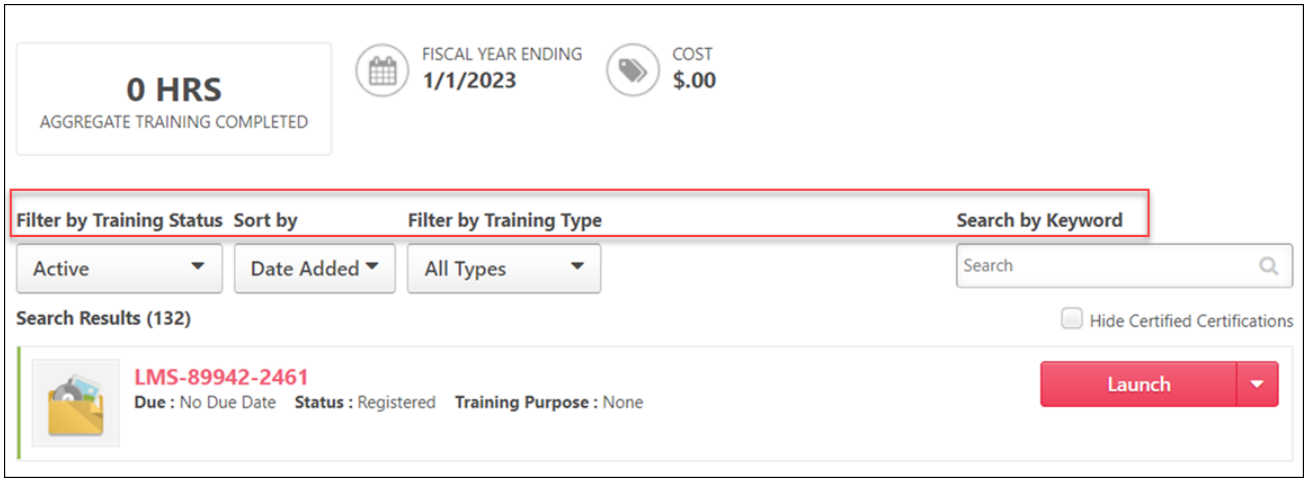
The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Training Update Tool	Grants access to the Training Update Tool. This tool enables administrators to mark multiple user transcripts complete for a single online course, quick course, test, or video via the upload of a csv file that includes user IDs, completion status, score and completion date. This is an administrator permission.	Learning - Administration

Titles Added to Transcript Filters

With this enhancement, titles have been added above the filters and the search bar on the Transcript page, to help learners clearly identify the purpose of the filters and search features and also allow for screen reader capability. The following text has been added over the following features:

- Training status filter drop-down - "Filter by Training Status"
- Sort By drop-down filter - "Sort by"
- Training type drop-down filter - "Training by Training Type"
- Search bar - "Search by Keyword"



Implementation

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

Permissions

The following existing permission applies to this functionality:

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

Training Removal Tool Enhancements

With the Feb '22 Release, the following enhancements have been made to the Training Removal Tool:

- The online content training type can now be removed via a training removal job
- The “Training ID” column header in the Training Removal Tool CSV template is renamed to “Training Object ID" to accurately reflect the data type required by the column

Support for online content removal is available for user acceptance testing as of the February 8 stage deployment.

Considerations

The online content training type is for third party online content delivered through a subscription but hosted on the provider's servers. ***Note:*** *Currently the online content training type is only available for clients who have purchased subscriptions such as Content Anytime, or content integrations, such as Skillsoft Percipio, Coursera for Business, or edX for Business.*

Implementation

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

Permissions

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

Transcript and Curriculum Page Auto-Refresh After Closing AICC Course

Prior to this enhancement, when a user closed an AICC online course they had launched from their transcript or from within a curriculum, the transcript or curriculum page would not automatically refresh to display the user's updated course progress. This could be confusing to users, who expected to see their course progress immediately reflected. In order to see their updated progress on the page, the user would need to manually refresh the transcript or curriculum page.

With this enhancement, when a user launches an AICC course from their transcript or from within a curriculum and then the user closes the course window, the transcript or Curriculum Player page automatically refreshes to immediately display the user's updated course status (In Progress or Complete, depending on whether the user completed the course). ***Note:*** *A course will move from a Registered status to an In Progress status only after the user closes the window of the AICC course, not immediately after the course is launched. This is existing behavior.*

Considerations

- This enhancement only applies to AICC courses. xAPI and online content courses will continue to require users to refresh the transcript or Curriculum Player page to view their updated course progress.
- SCORM 1.2 and SCORM 2004 courses already reflect the user's course progress immediately after the user closes the course.
- This enhancement only applies to the transcript page and curricula pages. This new behavior does not apply to the following other system areas:
  - Learner Home
  - Training Details
  - Learning Search
  - Playlists
  - Library Manage page (accessed from user's transcript)
  - Certification page

Implementation

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

Permissions

The following existing permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

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

Performance

Goals

Reporting Fields - Goals

With this enhancement, the following Goals reporting fields are available in Reporting 2.0:

- Goal Comments - The comments that the user adds to a goal.
- User Full Name - The full name of the user who added a comment to the goal.
- User ID - The ID of the user who added a comment to the goal.
- Goal Comment Create Date - The date the comment was added to goal.

Note: *You cannot use the Goal Comments field as a filter.*

How Does This Enhancement Benefit My Organization?

Customers can report on goal comments to track employee progress and feedback.

Implementation

This functionality is automatically enabled for all organizations using Performance.

Permissions

For more information about Reporting 2.0 permissions, see **Permissions Reporting 2.0.**

Observation Checklists

Reporting Fields - Observation Checklists

With this enhancement, the following Observation Checklist reporting fields are now available in Reporting 2.0:

- User Full Name - The full name of an Observation Checklist Co-planner.
- User ID - The User ID of an Observation Checklist Co-planner.
- Added Date - The date the co-planner was added. The value is shown as an Absolute Date.
- User Full Name - The full name of the user who added the co-planner to an Observation Checklist.
- User ID - The ID of the user who added the co-planner to an Observation Checklist.
- Observation Notes - The comments that a user adds in Observation Notes.

Note: *You cannot use the Observation Notes field as a filter.*

How Does This Enhancement Benefit My Organization?

Customers can report on observation checklist notes, and the co-planners for an observation checklist.

Implementation

This functionality is automatically enabled for all organizations using Performance.

Permissions

For more information about Reporting 2.0 permissions, see **Permissions Reporting 2.0.**

Performance Reviews

Performance Review Email Digest Enhancements

With this release, the email digest for performance reviews is improved through better targeted communication.

Smarter Performance Review Email Digest Logic

Prior to this enhancement, performance review Email Digest emails included past-due notifications for optional or locked performance review steps after the step due date.

With this release, Email Digest emails no longer include past-due notifications for optional or locked performance review steps after the step due date.

Increased Email Digest Configurability

Prior to this enhancement, for all active and configured performance review Email Digests, all active tasks were included in the Email digest.

With this release the Performance Review > Review Steps page now includes a **Exclude from Digest Email** checkbox that allows administrators to exclude individual performance review tasks.

Implementation

This functionality is automatically enabled for all organizations using Performance.

Considerations

- This enhancement does not impact standard or custom Emails. It is applicable only to email triggers created in Email Digest Administration.
- The **Exclude from Digest Email** checkbox is not editable once the task starts. This checkbox appears as read-only for tasks created before the release of this feature.

Permissions

The following existing permissions apply to this functionality:

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
Email Digest Administration - View	Grants ability to view email digests. This permission cannot be constrained. This is an administrator permission.	Performance - Administration

Recruiting

Candidate Document Management - Recruiter Workflow

Prior to this enhancement, recruiters had to submit a work order to delete attachments in the Applicant Profile.

With this enhancement, recruiters can now delete attached documents in the Applicant Profile by selecting the delete icon. When a document is deleted, users provide a reason for the deletion, which is recorded in the Applicant feed and History tab for audit purposes.

How Does This Enhancement Benefit My Organization?

Recruiters no longer need a work order to delete attached documents under the Applicant Documents and Attachment sections of the Applicant Profile's Documents tab.

Considerations

- Customers must enable the new Applicants: Delete Document permission for recruiters to allow them delete/replace documents.
- Resume parsing is not suitable for Resumes submitted after initial application.
- Flattened application is regenerated when recruiter updates the application document.
- No notification emails are triggered if document is deleted/ replaced by recruiter.
- Deleted files cannot be restored.
- Career Center Resume and LinkedIn resumes do not have corresponding Delete options.
- Replace workflow (for mandatory documents) is only available for Resume/ Cover Letter-type documents. For mandatory documents in the Applicant Document section > Other Documents, recruiters can delete and upload documents instead of replace workflow.
- Parsed details for deleted/replaced resumes may still be present on the Application profile page and the Flattened Application.
- For the Attachments section, users can only delete files they uploaded.
- System files, such as Interview Guides and Offer Letters, do not have the delete option.

Implementation

This functionality is automatically enabled for all portals using Recruiting.

Permissions

The following new permission applies to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Delete Document	Grants ability to access and manage delete and replace documents on the Applicant Profile > Documents tab or Attachments tab. This permission	Recruiting

	can be constrained by OU. This is an administrator permission	

Hired Application Data Retention

This feature was released as part of the 12 November 2021 patch.

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

Instant Data Deletion and Anonymization

Prior to this enhancement, one month was the minimum retention period available for configuring the retention period for application data.

With this release, customers can enable instant application data deletion and profile anonymization as follows:

- For internal candidates, applicant profile is not anonymized.
- For external candidates:
  - If candidate opted-out of consideration for other jobs and has no other active or hired applications, their details are anonymized.
  - If candidate opted-in for consideration for other positions, only application data is deleted. The details remain intact and are searchable via Candidate Search Query.

Implementation

- This feature is disabled by default. Contact Global Customer Support (GCS) to enable this feature or to manage existing applications that you may want to remove from the portal.
- Once an application status is changed to rejected/closed, it may take a few minutes for the process to execute.

Considerations

- Deleted/anonymized data cannot be restored.
- Once enabled, this featured applies to all Organizational Units (OU).

Manage Candidates View Profile - Link to Legacy Applicant Profile

Prior to this enhancement, when recruiters select a cohort of candidates on the Manage Candidates page and select View Profile, they can view candidate data but not the Applicant Profile in the context of the candidate cohort.

With this enhancement, a new icon and Application Profile link is added to the Manage Candidates View Profile that opens the legacy Applicant Profile in a new window, in the context of the candidate cohort.

Starter Guide

Click here to download the Manage Candidates Starter Guide.

Considerations

- The Applicant Profile link is not available for Suggested Referrals.
- Since the Applicant Profile page opens in a new browser tab, the breadcrumbs leading to the Application Profile open the Manage Candidates page.
- The Review Candidate Feedback feature is not impacted by adding the Application Profile link.

Implementation

This functionality is automatically enabled for all portals using Recruiting.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Applicants: Comments - Manage	Grants ability to view and manage comments for applicants. This permission also defines whether comments posted when an interviewer submits an interview recommendation are posted to the Comments section on the Applicant Profile tab. ***Note:*** *Interview recommendation comments for interviewers who have this permission display on the Applicant Profile tab. For interviewers who do not have this permission, the comments do not display on the Applicant Profile tab.*	Recruiting

Applicants: Comments - View	Grants ability to view comments for applicants.	Recruiting
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This permission also grants read-only access to the Applicant Review tab when creating or editing a job requisition. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Requisition: Owner	Enables owner to access requisitions and applicants for requisitions for which they are an owner. This permission also grants read-only access to video interviews that are completed by applicants via HireVue. For portals with Referral Suite enabled, this permission also enables requisition owners to edit the referral source on the Applicant Profile page. This permission cannot be constrained. ***Note****: This is a dynamically assigned permission that is not available in Security Role Administration. If the user is removed as an owner, the permission is revoked for the associated requisition. This permission cannot be manually assigned. Also, if a user has both the permission necessary to manage requisitions and be a requisition owner, the constraints of the* **Requisition: Manage** *permission overrule those of the* **Requisition: Owner** *permission. For requisition owners that do not also have permission to manage requisitions, only certain fields are editable when editing a requisition.*	Recruiting

Manage Candidates - Email Trigger Enhancements for Integration Assessments

With this enhancement, there is clearer email communication regarding the successful or unsuccessful assignment of an assessment using assessment integration as follows:

- Updated behavior of the Assign Integration Assignment email trigger
- New "Integration Assessment Assignment Status - Error" email trigger

Update Assign Integration Assignment Email Trigger

Prior to this enhancement, the Assign Integration Assignment email trigger sent an email whenever an integration was assigned, but it was not clear if the assignment was successful.

With this release, this email triggers only when a successful response is received from the vendor.

New Integration Assessment Assignment Status - Error Email Trigger

The Integration Assessment Assignment Status email trigger is used to notify recruiters and hiring managers when an error is received from the vendor during assignment of an integration assessment. This allows recruiters to learn about the error quickly so they can manually re-assign the integration assessment on the Manage Candidates page or automatically by re-adding a candidate to the Assessment Status. The new email is sent if there is an error with a manual or auto-assignment of the integration.

The new tag name is: APPLICATION.INTEGRATION.NAME

The new list of recipients is:

- Hiring Manager
- Requisition Owner(s)
- Requisition Reviewer(s)

Implementation

- This functionality is automatically enabled for all portals using Recruiting.
- Customers must create a new email template in email administration to use the new “Integration Assessment Assignment Status – Error” email trigger.

Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY

Applicants: Add/Move to Requisition	Grants ability to add or move applicants to requisitions the applicant did not apply for. This permission can be constrained by OU, User's OU, and Grade.	Recruiting
Applicants: Comments - Manage	Grants ability to view and manage comments for applicants. This permission also defines whether comments posted when an interviewer submits an interview recommendation are posted to the Comments section on the Applicant Profile tab. ***Note:*** *Interview recommendation comments for interviewers who have this permission display on the Applicant Profile tab. For interviewers who do not have this permission, the comments do not display on the Applicant Profile tab.*	Recruiting
Applicants: Comments - View	Grants ability to view comments for applicants.	Recruiting
Applicants: Status Change	Grants ability to change applicant status for any applicant to whom the user already has access. This permission cannot be constrained.	Recruiting
Requisition: Manage	Grants ability to access and manage all requisitions regardless of ownership (constraints permitting). This 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.*	