



## Cornerstone HR Release Notes March 2023

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# Cornerstone HR

## CSX “User Record as of a Date” Standard Report Deprecation

The "User Record as of a Date" Standard Report is being deprecated with the March '23 Release. Customers are encouraged to use alternative reporting options that are currently available today.

- Customers who have Cornerstone HR CSX enabled in their portal, using the effective dating feature or the aggregate audit feature, are encouraged to use the "Point-in-time Headcount Details" report instead. This report will provide a list of user records for a specific date at any point in time.
- Customers who do not have Cornerstone HR CSX enabled are encouraged to use Reporting 2.0 instead. For customers who do not use Cornerstone HR CSX, this report did not respect any past/future point in time relations/data values. It always generated results based on an "as of now" dataset which is why Reporting 2.0 is a viable alternative.

### Deprecation Milestones:

- Milestone 1 (August 2022): August '22 Release initial deprecation announcement.
- Milestone 2 (November 2022): November '22 Release deprecation announcement reminder.
- Milestone 3 (March 2023): Deprecation of the “User Record as of A Date” standard report.

## Form Enhancements

With this enhancement, two new Forms features are available:

- Target User Name in Request Titles: When viewing a request, the target user's name is added to the Request Title.
- "Personal Email Address field": "Personal Email Address" is added as a standard field when creating a form.

### Target User Name in Request Titles

Prior to this enhancement, the Request Title did not include the user's name which made it impossible to identify the user associated with a request without opening each form request.

With this release, the Target User's full name is added to the Request Title, making it easy to identify the target user at a glance.

The Target User name is displayed in the Request Title when the form is submitted as follows:

- Using "Proxy as a user".
- Using "Complete Form" for another user.
- By the employee for themselves, for example, when requesting a day off (Requester = Target User).

### Personal Email Address Field Now Available in Forms

With this enhancement, the Personal Email Address field is added under the User Standard Fields section on the Build tab. This allows users to request a personal data change for the Personal Email Address.

## Implementation

This functionality is automatically enabled for all organizations using the Cornerstone HR module.

## Permissions

The following existing permissions apply to this functionality:

### Target User Name in Request Titles

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Request Items - Forms	Allows user to access form requests on Universal Profile Request items. This permission cannot be constrained.	Universal Profile

Request Items - View	Allows user to access the Requests tab on the Universal Profile > Actions tab. This permission cannot be constrained.	Universal Profile
Requisition: Approver	Enables approver to access and approve/deny requisitions for which they are an approver. This permission cannot be constrained. <b>Note:</b> <i>This is a dynamically assigned permission. If the user is removed as an approver for an offer that is in a Pending Offer status, the user can no longer access that version of the offer. This permission cannot be manually assigned.</i>	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

### Personal Email Address field in Forms

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Forms - Manage	Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission.  <b>Note:</b> <i>This permission enables access to the Form Management functionality that is part of Cornerstone HR functionality and the Onboarding module. This permission does not grant access to the Training Forms Management functionality.</i>	Forms Management Administration

## Form Management – Disable Form Fields in Reporting

Prior to this enhancement, there was no way to prevent reporting on fields from specific forms. Additionally, some fields were not available at all for reporting and the form data did not update correctly because of the 1024 field limitation.

With this enhancement, a new **Include form in reporting** option appears on the Manage Forms page. By selecting this option, administrators can decide per form if the response fields used in a form are reportable. Disabling form fields that are not in use anymore ensures that the number of fields reportable across forms stay below the system limit and ensures that form data updates correctly in reporting.

To access this option, administrators can go to [ADMIN > TOOLS > CORE FUNCTIONS > FORM MANAGEMENT > MANAGE FORMS](#) . On the Available Fields tab, select the Build tab.

- If the response fields should be included in reporting, click the **Include form in reporting** check-box.
- If the responses for the User Record Custom, Standard and Question Bank fields from the form should not be reportable, uncheck the **Include form in reporting** check-box.

By default, form fields on all existing and new forms are reportable.

### Considerations

- All existing forms are automatically set to reportable.
- Submission fields continue to display in reports, regardless of the **Include form in reporting** setting.
- Response fields used in several forms, with one form set to non-reportable, still appear in reporting.
- The new form setting is hiding only response fields from the form.
- If the system limit of 1024 fields is reached, the form data does not update properly in Reporting 2.0. Reduce the number of response fields to stay within the limit.

### Implementation

This functionality is automatically enabled for all organizations using the Cornerstone HR module.

### Permissions

The following existing permissions apply to this functionality:

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
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Forms - Manage	<p>Grants access to the Manage Forms functionality. This permission can be constrained by OU and User's OU. This is an administrator permission.</p> <p><b>Note:</b> <i>This permission enables access to the Form Management functionality that is part of Cornerstone HR functionality and the Onboarding module. This permission does not grant access to the Training Forms Management functionality.</i></p>	Forms Management Administration
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