



Cornerstone Basic ILT Administrator

Reference Guide

Revised 7/9/2009

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Getting to Know Cornerstone

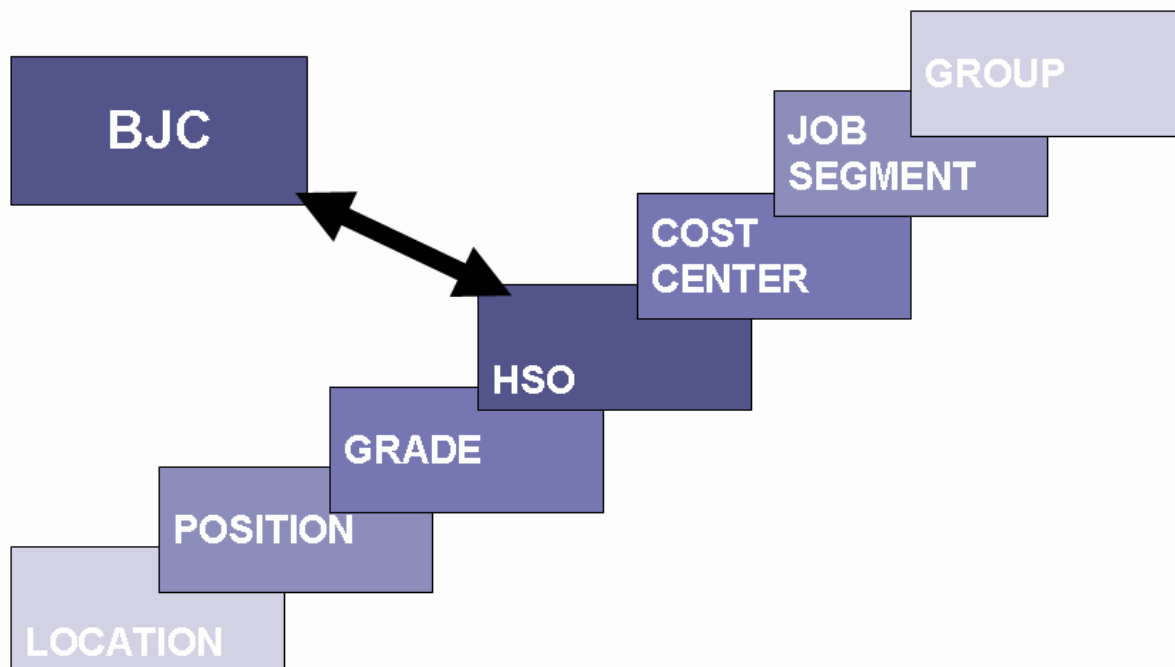
The **Cornerstone Learning Management System** is a system that offers many tools to better manage our users in the **BJC environment**. This also means that there are more parts to learn. One of the benefits of this new software is that we have **more levels of security** which means we can better manage the data. You will find this new system to be friendlier and offer more robust features such as reporting, certifications, etc. that you will find helpful in your role as managers and administrators.

Overview of LMS

Purpose of this LMS is to not only provide training to users but to help users find the **right type of training**. Not only is it important to provide the training but to be able to easily track the training completed by users and maintain a level of security in doing so. Cornerstone OnDemand provides us with these tools.

BJC Organizational Units

In order to manage BJC users we are organized into **OUs** or **organizational units**. These **OUs** make it easier to match our users to the proper Learning Objects.





New LMS Terminology

In order better understand this new system you need to know some of the terminology this system uses. Remember scrolling is very important in this system.

PATHLORE	CORNERSTONE
Course	Event
Transcript	Transcript
Enroll	Request
Development Plan	Your Assigned Training
Curriculum	Curriculum
Groups	Groups

New Cornerstone Features and Terms

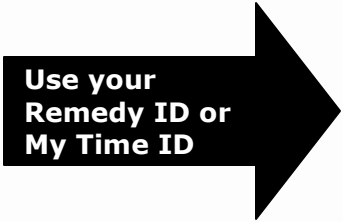
New Tool or Term	Description
Learning Objects	An object that is used for training a user including an instructor led training class, external training class, on-line class, podcast, documentation, etc
Widgets	Boxes on the home page that show your Assigned Training, Training in Progress and Your Upcoming Sessions. These contain links to the details of the Learning Object.
Search – Advanced Search for users	Search box – upper right corner of every screen. Provides users a quick way to find a Learning Object.
Organizational Units	Units created to categorize and manage our users
Groups	Custom Organizational Units
Resource Library	A document and info storage bank that is used to store materials for upcoming classes, links to interesting websites, Ask the Expert folders to post questions and hold discussions about specific topics.
ILT Tab	Instructor Led Training Events and Sessions
Reports	A series of reports are now available for anyone with subordinates as well as those with ILT Admin rights.



User Experience

Welcome to BJC's new Learning Management System called **Cornerstone OnDemand**. This new environment replaces the **Pathlore** system. This new system provides our users with a friendly environment to better manage their training needs.

Every user in the BJC system will see the same type of welcome screen. To access the Cornerstone system you will need to follow the same steps you did to get to Pathlore. During the first few months you will see an interim screen before the login screen that will ask you to click on the HSO or hospital you work from.



BJC Network ID:

Password:

Domain:

That is because the Cornerstone LMS system is being rolled out to our organization in stages so that we can provide better customer service to our users. Simply click on the **HSO** where you work to access the sign on screen.

Home Tab/Welcome Page

The home page is what you see when you first enter the Cornerstone system. Use this page to:

- Find access to training or your transcript
- Search, request or launch training

Corporate Training: bjcpiilot - Windows Internet Explorer
 https://bjcpiilot.cyberu.com/LMS/catalog/Main.asp?tab_page_id=67

Corporate Training: bjcpiilot

Online Learning Center

Search box

Tabs

Welcome, Kris Jorstad, to the Center for LifeLong Learning.

Development Plan

On-line Training in Progress

Registered Classes

Your Assigned Training		
Due Date	Action	
Age Specific Care AST	None	None

Training in Progress	
No in-progress training	

Your Upcoming Sessions	
Status	
Word Basic (Starts 5/5/2009)	Register



Learning Tab – Your Transcript

Your **transcript** will automatically display when you click on the Learning tab. Your transcript (Development Plan) shows:

- Assigned Training
- Completed Training
- In-Progress Training
- Registered Training

Online Learning Center

Home Learning Resource Library

View Your Transcript | Browse for Training

Transcript: KRISTEN JORSTAD

Use the transcript to manage all active training.

You have completed 0 hours (Cost: \$,00) of aggregate training for the fiscal year ending 12/31/2009

Title	Type	Due Date	Status	Options
Electrical Safety - BJSF	Curriculum	None	In Progress	Manage
Ergonomics	Curriculum	None	Completed	Withdraw
Bloodborne Pathogens	Curriculum	None	In Progress	Manage
Cornerstone Administrator Training (Starts 4/28/2009)	Session	None	Registered	Withdraw
Microsoft Excel Basic Skills (Starts 3/9/2009)	Session	None	No Show	Select Session

Note !

Remember to scroll down to see all transcript items. You may have more than one page to view as well.

Transcript Options List

The far right hand column called Options allows you to control the training object. The options displayed are You can:

- **Manage** (Starts a curriculum)
- **Withdraw** (allows you to withdrawal from a session)
- **Select Session** (allows you to pick a specific session date and time)
- **Register** (allows you to pick a specific session)

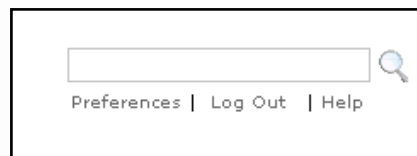
Task – Viewing a Learning Object Details

1. Click on the **name of the object** to see the details
2. Use the **BACK** button to view your transcript again



Searching for Training (Learning Object)

You can easily search for any type of training by using the **Search** box in the upper right hand corner of any Cornerstone screen. You can also use the **Browse for Training** link located under the **Learning Tab** to browse for specific training types and dates.



Quick Searching

The **Quick Search** box is located at the upper right hand corner. When you type a keyword, this search box will open a new screen that will display the results of your search. Scroll to the bottom of the screen to view all search results.

Task – Quick Searching

1. Type a **keyword** to search by (example Excel Basic).
2. Press **ENTER**.

Advanced Searching

If you want to be more specific when you search, you can use the field boxes to type keyword searches by Subject, Provider, Competency, Location, Locator Number, Instructor, etc.

The screenshot shows the 'Advanced Search' page with the following elements and callouts:

- Navigation Bar:** Home, Learning, Resource Library, <
- Advanced Search Section:** Set search criteria by checking and un-checking Learning Object types. To perform a single type search, click on the Learning Object type.
- Learning Object Types:** Online Class, Event, Curriculum, Posting, Test, Material. Each has a checkbox below it.
- Search Fields:**
 - PowerPoint (with dropdown arrow)
 - Description
 - Subject (with dropdown arrow)
 - Provider (with dropdown arrow)
 - Competency (with dropdown arrow)
 - Location (with dropdown arrow)
 - Locator Number
 - Instructor
 - Contributor
- Search Button:** A button labeled 'Search' with a magnifying glass icon.
- Callout 1:** Points to the 'Material' icon with the text: "Click on the learning object to automatically search for just that".
- Callout 2:** Points to the 'Competency' dropdown field with the text: "Type a keyword in the field to search for specific training.".
- Callout 3:** Points to the search results area with the text: "Result of search show here. Scroll to see all.".
- Search Results:** A single result is shown: "PowerPoint Basics Center for LifeLong Learning | \$0.00".
- Sort By:** Radio buttons for Title, Type, and Provider.



Browse for Training

You can also search for training within your transcript.

Simply click on the **Browse for Training** link on the Learning tab. You can search by type or date.



Task – Browsing for Training

1. Click on **Learning** tab.
2. Click on **Browse for Training**.
3. Click on a **training subject** or click on a **date** to narrow your search.
4. Select a **Learning Object** from the list of results.

Resource Library

The Resource Library Tab contains folders that are used to store materials such as manuals, PDFs, and documents for classes, and a discussion forum to ask computer questions.

Posting a Question

You can post a question to a particular folder. You can also attach a document to the question or discussion.



Task – Posting a Question to a Folder

1. Click on the **Resource Library** tab
2. Click on the **Ask New Question** link.
3. Type the question and choose the topic.
4. Click on **Submit**.



Common Questions

HOW DO I...	HERE'S HOW...
View my Active Transcript	1. Click on the Learning tab or click on the Development Plan building.
Quickly Search for a Class by keyword	1. Type the keyword in the Search box found in the upper right hand corner 2. Press Enter on your keyboard to see a search results screen. 3. Notice the Learning Object names (Training names) are underlined. These are links to the session info (class info).
Search for a class by location, type, etc	1. Click on the Learning tab to view your transcript 2. Click on the sub-tab " Browse for Training " 3. Search for a class by type, by date or use the Advanced Search link.
Enroll in a Class	1. Search for the training you wish to request (enroll) 2. When you see the name of the class on the bottom of the search screen (scroll down) click on the Name . 3. Review your session choices and click on the Request link to enroll.
Start on On-line course	1. Follow the steps to search for the on-line course if it is not in your transcript. 2. Make sure you turn off pop up blocker . (see how to on this page) 3. If you see the on-line course in your transcript, click on Activate to start. 4. Click on Launch . <i>Note: you might need to launch the course a 2nd time if it doesn't react.</i>
Print my transcript	1. Click on the Learning tab to view your transcript 2. Click on the Action (Globe) button and select Print your Transcript .
Archive an old object	1. Click on the Learning tab to view your transcript. 2. Select an learning object that is completed by clicking on the name link. 3. Click on Add to Transcript Archive button . 4. Click on Yes to verify.
Check my score on an on-line course	1. Find the course you want to check the score. 2. Select the course by clicking on the Name link. 3. Click on the details icon for the course to see the score and # of attempts. 4. Use the Back button or click on the Learning tab to see your transcript.
Notify my boss if a class has to be approved	• Your manager will need to approve your training by viewing your request under the My Team tab (only available to managers).
How do I turn Off Pop Up Blocker?	1. Choose Tools + Pop Up Blocker + Turn Off Pop Up Blocker .
Withdraw from a Class	1. Click on the Learning tab to view your transcript. 2. Find the Session you want to withdraw. 3. Click on the Withdraw link. 4. Select a reason for withdraw and press Submit .
Problems logging in?	Call the Help Desk at 362-4700
Problems with running curriculums	Call the Help Desk at 362-4700
Questions requesting or withdrawing from a BJC Learning Institute class	Call Lois Currie at 362-0983.



Basic ILT Admin Role

Your role in this system is to control aspects of **Instructor Led Training**. In the Cornerstone system, **Events** are instructor-led training courses that contain general information about the course, such as the description, the objectives, the vendor, and the subjects. Events can be held at different times and locations by different instructors. Therefore these scheduled instances of an event are referred to as **Sessions**.

As an Basic ILT Admin or ILT Instructor you will see the following tabs:



Note !

Each HSO has an **HSO Admin** that will create the needed events within the Cornerstone system. Within the HSO are **Data Entry ILT Admin** and **ILT Instructors** that will manage the sessions and rosters for an event.

Vendor and Instructors

Before you can set up a new session, you need to make sure that there are Instructors set up in the Cornerstone system for your session. Under the ILT tab there is a sub-tab called **Vendors and Instructors**. You will find the list of Instructors for your HSO under the list of Vendors. If the instructor is not listed under your HSO, then you will need to add them as an instructor.

Add Instructor

Task – Setting up a New Instructor for your Location

1. Click on **ILT** tab.
2. Click on **Vendors and Instructors** sub-tab.
3. Find your location in the list and click on the **Instructor's** Link.
4. Type the last name of the instructor and click on **Search**.
5. Click on **Add New Instructor** link.
6. **Important: Do NOT type name of instructor** – click on **Pop up icon** to select from a list.
7. Type the **name** and click on **Search**.
8. Click the **name** to add it to the form.
9. Click on **Submit**.



Facilities and Resources

The Cornerstone System also has a list of facilities by location. Before you can create a session you will need to check if the facility you want to use is listed under your HSO. You can check this by clicking on the sub-tab called Facilities and Resources under the ILT tab.

You can add a new facility to make available but remember you cannot delete a facility, just inactivate it.

The screenshot shows two forms. The top form, 'Add Location', includes fields for Name, ID#, Type Location, Parent, Owner, Description (circled in black), and Action. Below it is a checkbox for 'Allow Recursion'. The bottom form, 'Facility Information', includes fields for Facility Type, Address #1, Address #2, City, State, Postal Code, Time Zone, Contact, Home, Fax, Email, Occurrence, Approval Required, and Do Not. At the bottom are 'Cancel' and 'Save' buttons.

Task – Adding a New Facility

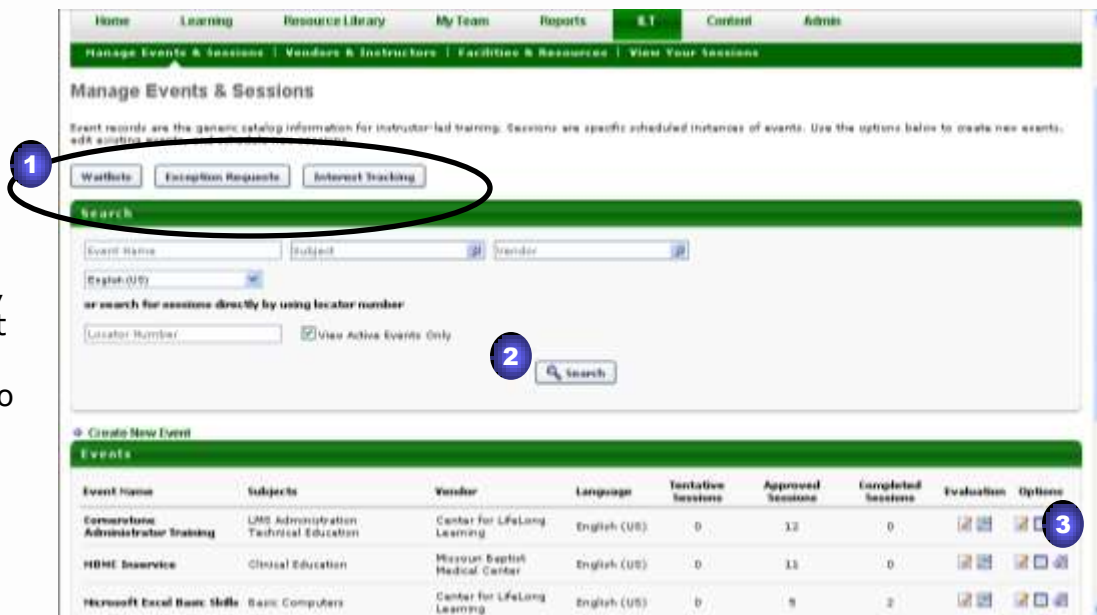
1. Click on the **ILT** tab.
2. Click on **Facilities and Resources** sub-tab.
3. Search for your **HSO** or location and click on the + to expand the list.
4. Click on **Add Facility**.
5. Fill out the details of the new facility.
6. Click on **Save**.



Managing Events and Sessions

The **Managing Events and Sessions** sub-tab allows you to find events and create sessions for them. You can also check waitlists, except requests and track down users that are interested in events that have sessions scheduled.

Only HSO Admins can create events, please contact them if a new event needs to be created.



1. **Waitlists**..... provides a list of waitlisted users
- Exception Requests** provides a list of users that are requesting session enrollment.
- Interest Tracking** opens a search screen to find users that express interest in an event
2. **Search for an Event**allows you to search for a particular event
3. **View Sessions**opens a list of sessions available for the event

Searching for an Particular Event and Viewing it's Sessions

In order create and edit sessions, you need to find the **event** itself. Under the ILT tab's **Manage Event & Sessions screen** you will find a search screen for events. Click on the Search button with no criteria entered if you want a list of all events available. Otherwise type keywords for event name, subject, vendor or locator number to find an exact event.

Task – Searching for an Existing Event and View it's Sessions

1. Click on the **ILT** tab.
2. Type a **keyword** in one of the Event. search criteria boxes
3. Click on the **Search** button.
4. The results of the search will show below.
5. Click on the event's **View Sessions** button .



Viewing Session Details

It is helpful to think of **Sessions as scheduled instances of instructor-led training courses** or individual occurrences of Events. Sessions hold more specific data, including the times, locations, instructors, and resources for a specific course instance. Depending on your ILT Admin security role, you might be able to only view existing sessions or create new ones.

Start Date	Session Number	Locator Number	Status	Enrollment	Evaluation	Op.
4/21/2009		12	Approved	5 of 5		
4/1/2009		30	Approved	0 of 0		

1. **Search** view sessions that are Tentative, Approved, Completed or Canceled - or - search by Session Number or Locator #
2. **Create New Session** use to create a session
3. **Edit Session** to make changes to an existing session
4. **Copy** to create a copy of a session
5. **View Roster** to view and manage a roster
6. **Details** to view session details
7. **Cancel** to cancel a session (will send an e-mail to user if activated)



Creating and Editing a Session

Notice you will see **5 sections** to edit in order to complete your new session. Don't be overwhelmed. This system allows you to save a great amount of detail for each session which will come in handy when it's time to run a report.

To save time entering new sessions, you can also copy an existing session. Then you will only need to change the info under the Schedule and Availability tabs.



Note !

Verify that you have an instructor and location set up in the system before you begin.

Task – Creating a New Session by Copying

1. Go to **ILT** tab.
2. Search for an existing **Event**.
3. Click **View Sessions** icon.
4. Click **Copy** icon .

Click here to simply change the date only and then click on Apply.

Status	Day	Part Name	Starts	Ends	Duration	Location	Instructor	Options
●	Thursday	1	5/7/2009 8:00 AM CST	5/7/2009 12:00 PM CST	4 Hour(s) 0 Minute(s)	561CU Conference Room	MYRA SUNTRUP (Primary)	 

Click here to change the date, time and location.

5. Click on the **Edit** button to change date, time and location.
6. Enter **Start Date** and **Time** and **End Date** and **Time**.
7. Click on the **Location** to change the location.
8. Click on the **Instructor** link to change the instructor.
9. Click on **Save Part**.
10. **Click on Next to make changes to Details screen.**
- or
11. Click on **Availability** tab to change the Session Availability.
 - a. Select the **Availability Selection Criteria** using the drop-down menu.
 - b. Click to select a specific **Organizational Unit**.

- i. Use the **Pop Up** icon to choose a specific OU.
- ii. Click on **Done**.

12. **Click on Save** to finish copied Session.



Managing a Session's Roster

Rosters are used to manage and track **session attendance** and completion information about a particular session. You can only manage the roster for the sessions that you are listed as the instructor.

Viewing a Session's Roster

When the **roster** opens, notice the details are displayed first and then the list of users registered for the class. You can also adjust the information displayed on the roster by turning on:

- Show Session-Related Details
- Expand All History
- Show Withdrawn/Deleted Users

1 Use the roster to manage and track session attendance, classroom performance and completion information. When you have entered all comments, scoring and attendance data, click 'Submit Final Session Report' below to make this information available in employees' transcripts.

2 Session Status: Approved **Mark Complete**

3 Schedule: Date: 4/1/2009 3:00 AM - 4/1/2009 5:00 AM CST
Location: 0205 - MBMC > MBMC Auditorium 1 [view map]

4 Current/Max Registration: 3
Waitlisted: 0
Exception Requested: 0
General Comments: [Edit Comments](#)

5 Actions: [Email Registered Users](#)

6 Show Session-Related Details Expand All History Show Withdrawn/Deleted Users

Update attendance and scoring

ROSTER

4 SMITH, LARRY
Organizational Unit(s): Missouri Baptist Medical Center (H50)
OFFICER, SECURITY - UNARMED (Position)
Email: llx8542@bjc.org
Action History: [Show History](#)

Appears when class is over. Click here if you updated the attendance and want to finalize the roster so it will appear complete in the user's transcripts.

Click here to mark attendance and record any scores if necessary.

1. **Print** or **Export** your Roster .. to produce a concise printed list
2. **Session Status** changes to "Mark Complete when past date
3. **Manage Waitlist**..... shows if class is filled and someone is waitlisted
4. **Roster Details** a detailed list of each user enrolled in the session
5. **Update Attendance** shows when class is over
6. **Expand All History** shows Action History for each user's enrollment

Task – Viewing a Session's Roster

1. Search for the **Event**.
2. Click on the **Event's View Sessions** button .
3. Click on the **Session's View Roster** button .



Marking Attendance on a Specific Roster

Before you can finalize a roster, you will need to update the attendance. The **Update Attendance and Scoring** link will open a screen that allows you to mark attendance and even record a score if applicable.

Attendance and Scoring

(1) 4/1/2009 9:20 AM - 5:20 PM

[Check/Uncheck All](#)

Registered Attendees				
NAME	USER ID	ATTENDANCE	SCORE	PASS
Bonzon, Jeanne	jeanne1	<input type="checkbox"/> 1	<input type="text" value="0"/>	<input checked="" type="checkbox"/>
Curie, Lois	lourie	<input type="checkbox"/> 1	<input type="text" value="0"/>	<input checked="" type="checkbox"/>
Jorstad, Rita	hjordst	<input type="checkbox"/> 1	<input type="text" value="0"/>	<input checked="" type="checkbox"/>

[Update](#) [Update & Submit](#)

Make sure you mark the attendance or the person will be marked as a No Show.

Task – Updating your Attendance

1. Search for the **Event**.
2. Click on the **View Sessions** button. 📅
3. Find the session and click on the **View Roster** button. 👤
4. Click on the **Update Attendance and Scoring** link.
5. Mark the user's **attendance**.
6. Click on **Update** or **Update and Submit** if you need to finalize it.

Removing a User from a Roster

You can only remove a user from a roster if you control that roster. When you are viewing a particular session's roster, you can also turn on "**Show Withdrawn/Deleted Users**" to filter the roster list.

When you **withdraw** a user from the roster **you must choose a reason** for the withdrawal and then submit the request.

Session Withdrawal Options

Please select a reason:

Please enter your reason for withdrawing your registration:

[Close](#) [Submit](#)

You must choose a reason from the list before you

Remember that this is **NOT** reversible. The user will be charged any withdrawal penalties automatically.

Task – Withdraw an Attendee from a Roster

1. Search for the **Event**.
2. Click on the **View Sessions** button. 📅
3. Click on the **View Roster** button. 👤
4. Scroll down the list to find the user you wish to withdrawal.
5. Click on **Withdraw User**.
 - a. Select a reason from the drop down list.
6. Click on **Submit**.

Note !

Withdrawing a user from the roster is not reversible. The user will either need to reenroll, the manager will need to reassign or you will need to proxy enroll the user.



Managing a Session's Waitlist for a Particular Roster

When viewing the roster, if your session reaches the **maximum registration**, you will see the **Manage Waitlist** link. Depending on your security role in the system, you can either simply view the waitlist or edit it. Notice that you can print the waitlist or export it into Excel.

Task – Viewing Waitlist Options

1. Search for the **Event**.
2. Click on the **View Sessions** button. 
3. Click on the **View Roster** button. 
4. Click on **Manage Waitlist** button.
5. Click on a **response** (Depending on your security role).



6. Click on **Done**.

Finalizing a Roster



Once the attendance has been updated, you will need to click on the **Mark Complete** link to submit the final session report. The Cornerstone system will confirm that you want to submit the final roster.

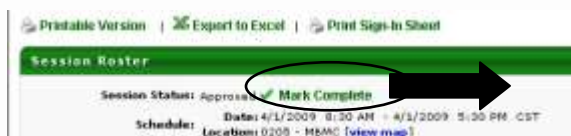
Cornerstone will remind that your roster submission is being processed. At any time, you can make a change to the roster and click on **Mark Complete** to update the user's transcripts. Generally, this Cornerstone will take approximately 15 minutes to update the system with the transcript information.

Note !

In order for the completion of this session to show up on an employee's transcript, you will need to click "Submit Final Session Report".

Task – Marking a Roster Complete

1. Search for the **Event**.
2. Click on the **View Sessions** button. 
3. Click on the **View Roster** button. 
4. Click on **Mark Complete** link.



5. Click **Yes** when you see the **Confirmation** message.
6. Click on **OK**.



Adding Users to Event Sessions (called Proxy Enrollment)

You can easily remove someone that has enrolled in a session that you created. But if you need to add one or more users to the roster, you will need to do this in **Proxy Enrollment**.

What is Proxy Enrollment?

The feature allows you to assign, pre-approve and enroll one or more users to a roster. You will find this feature under a separate tab called **Admin**.

Online Learning Center

Home Learning Resource Library ILT **Admin**

Proxy Enrollment

Use Proxy Enrollment to assign, pre-approve, or enroll individuals or groups of employees for training.

Use Proxy Enrollment to assign, pre-approve, or enroll individuals or groups of employees for training.

Proxy Enrollment

Keyword:

Request Date: This Week From: 3/29/2009 To: 4/4/2009 Search

Training	Create Date	Created By	Type	Status	Options
anticoag pretend course	3/31/2009 7:18 AM	Mueh, Betsy	Standard	Processed	

1. **Proxy Enrollment** use to create a new Proxy Enrollment
2. **Search** box..... use to search for existing Proxy Enrollment
3. **View Details**..... view the details of the Proxy enrollment
4. **Progress Pie chart** creates a report detailing enrolled users

Searching for an Existing Proxy Enrollment

If you need to see the details of an **existing Proxy Enrollment** you set up, you will need to find the enrollment first. Search by keyword or request date to view a list of current proxy enrollments.

Task – Searching for an Existing Proxy Enrollment

1. Click on the **Admin** tab.
2. Click on the Proxy Enrollment Subtab.
3. In the keyword search box, type part of the Event's name that you created a Proxy Enrollment.
4. Select a **request date**.
5. Click on the **Search** button.



Creating a New Proxy Enrollment




Whether you need to enter one or multiple users into the session roster you will need to create a new Proxy Enrollment.

Proxy Enroll Individuals

Note !

Proxy Enrollments cannot be deleted. Make sure you have all the names you will be adding to the enrollment before you begin. If you forget to add someone you will need to set up another proxy enrollment.

Task –Creating a New Proxy Enrollment for Individuals

1. Click on **Admin** tab.
2. Click **Proxy Enrollment** link.
3. **Search** for a learning object.
4. Click **Add**  to select the learning object or click **Expand**  for an Event's session.
Note: if event is added, the user can select a session from their transcript.
5. Under Proxy Enrollment Options...
6. Select **Type: Standard**.
7. Select **Schedule**.
8. Select **Status**:
 - a. **Assign training** - Item still needs Approval
 - b. **Assign & Approve training** - Item is not registered
 - c. **Assign, Approve & Enroll employees directly into training and Add to Transcript (Completed)** – marked completed in the user's transcript.
Note - this option available for sessions with a date prior to current date.
9. Click **Next...**
10. Under Availability Options...
11. Choose **Availability Selection Criteria** using the drop-down menu.
Note : Select Users if you want a list of individuals
Click on the **pop-up icon** to select a specific **user**.
12. Search for the user by Name.
13. Click **Add**  to add the Organizational Unit or user.
14. Click **Done**.
15. Click **Next...**
16. Under Proxy Email Options...
17. Select **No Emails** or **Ad-Hoc Email**.
18. Click **Next...**
19. Under Confirm...
20. **Confirm** proxy enrollment details by checking to make sure you enrolled the right users.
Note: Check your list of users, if you miss someone and you submit the proxy enrollment, you will need to create a new proxy enrollment.
21. Click **Submit**.

**Note !**

If you add more users to the Proxy Enrollment than there are seats available, Cornerstone will automatically increase the maximum number of seats for you.

Proxy Enroll a Group**Task –Creating a New Proxy Enrollment for Groups**

1. Click on **Admin** tab.
2. Click **Proxy Enrollment link**.
3. **Search** for a learning object.
4. Click **Add** ➕ to select the learning object or click **Expand** ⊕ for an Event's session.
Note: if event is added, the user can select a session from their transcript.
5. Under Proxy Enrollment Options...
6. Select **Type: Standard**.
7. Select **Schedule**.
8. Select **Status:**
 - a. **Assign training** - Item still needs Approval
 - b. **Assign & Approve training** - Item is not registered
 - c. **Assign, Approve & Enroll employees directly into training and Add to Transcript (Completed)** – marked completed in the user's transcript.
Note - this option available for sessions with a date prior to current date.
9. Click **Next...**
10. Under Availability Options...
11. Choose **Availability Selection Criteria** using the drop-down menu.
12. Click on the **pop-up icon** to select a specific **OU**.
13. Click **Add** ➕ to add the Organizational Unit or group.
14. Click **Done**.
15. Click **Next...**
16. Under Proxy Email Options...
17. Select **No Emails** or **Ad-Hoc Email**.
18. Click **Next...**
19. Under Confirm...
20. **Confirm** proxy enrollment details by checking to make sure you enrolled the right users.
Note: Check your list of users, if you miss someone and you submit the proxy enrollment, you will need to create a new proxy enrollment.
21. Click **Submit**.

Note !


If you set up a Standard proxy to a group, then you can deselect individual users before you submit. If you set up a Dynamic proxy to a group, you cannot exclude any users from the group.



Viewing Proxy Enrollment Progress Pie Charts

Once your proxy enrollment is finished and processed, you can check the progress of the enrollment before the session happens. **The Proxy Enrollment Progress Pie Chart** gives you an excellent summary of how your enrollment is going.

Task – Viewing Proxy Enrollment Progress Pie Charts

1. Click on **Admin** tab.
2. **Search** for the Proxy Enrollment by name or date.
3. Click on **Search**.
4. Click on the specific proxy's **Progress Pie Chart** link. 

Username	ID#	Username	ID#	Organization	Status	Completion Date
WELLS, ROBERTA	208681147	WELLS, ROBERTA	208681147	Missouri Baptist Medical Center (HMO) - SURGE STAFF (Fulltime)	Registered	100%
ADAMS, BETHANNE	208682444	ADAMS, BETHANNE	208682444	Missouri Baptist Medical Center (HMO) - TECH. ASSISTANT CARE - DRG Creation	Registered	100%
ADAMS, KATHLEEN	208682822	ADAMS, KATHLEEN	208682822	Missouri Baptist Medical Center (HMO) - TECH. ASSISTANT CARE (Parttime)	Registered	100%
ADAMS, BRYAN	208682781	ADAMS, BRYAN	208682781	Missouri Baptist Medical Center (HMO) - TECH. ASSISTANT CARE (Parttime)	Registered	100%
ADAMS, OLGA	208682018	ADAMS, OLGA	208682018	Missouri Baptist Medical Center (HMO) - ASST. ADMINISTRATIVE (Parttime)	Registered	100%
ADAMS, PATTI	208682920	ADAMS, PATTI	208682920	Missouri Baptist Medical Center (HMO) - TECH. ASSISTANT CARE (Parttime)	Registered	100%
ADAMS, ROSARIO	208684776	ADAMS, ROSARIO	208684776	Missouri Baptist Medical Center (HMO) - SURGE STAFF (Fulltime)	Registered	100%



Running ILT Reports

The ILT Admin can run a variety of reports to track the status of the sessions they created.



Report	Description
Enrollment Summary	Displays summary information for Instructor Led sessions
Instructor Calendar	View ILT Events for Instructors by week. You can filter the report by ILT Event or Instructor Name but you must have a Vendor.
Interest Tracking	Views events which users have expressed interest in.
No-Show	Displays session where one or more students did not attend the required number of parts. Allows you to view a detailed list of no-show employees.
Request Status Summary	Displays a summary list of requested training.
Session Cancellation	Displays a list of canceled sessions, including the reason for cancellation.
Session Cost	Displays cost associated with each session.
Session Withdrawal	Displays a list of employees who registered for sessions and later withdrew their registration, including the reason for withdrawal.



Running an ILT Enrollment Report

When you need a report summarizing how enrollment is going including how many users registered, how many withdrew, how many are waitlisted, etc. run the **Enrollment Report**. Before you run the report, you will need to select date and advanced filters. Then you will need to choose how you want to output the report : **print** or **export**.

Enrollment Summary
View summary information for Instructor Led Training (ILT) sessions.

Date Filters

Date Criteria: This Month | From: 4/1/2009 | To: 4/30/2009

Advanced Filters

Facility:

Vendor: All

Instructor: (Please Select Vendor First)

Event:

Locator Number:

[Printable Version](#) [Export to Excel](#) [Export to Text](#)

Task – Running an ILT Enrollment Report

1. Click on **Report** tab.
2. Click on **ILT** sub-tab.
3. Click on **ILT Enrollment Report**.
4. Select the **date** and **Advanced Filters** you need.
5. Select **Printable Version**, **Export to Excel** or **Export to Text**.



http://bjepilot.cybera.com - ILT Enrollment Summary Report - Microsoft Internet Explorer

File Edit View Favorites Tools Help Snap

ILT Enrollment Report

DATE/TIME	TITLE	LOCATION NUMBER	SESSION NUMBER	INSTRUCTOR	LOCATION	WAITLISTED	WITHDRAWN	CURRENTLY REGISTERED	NO SHOW	COMPLETED	CAPACITY
4/1/2009 9:30:00 AM	Microsoft Excel Basic Skills	38			0205 - M&MC	0	1	2	0	2	3
4/5/2009 9:30:00 AM	Comerstone Administrator Training	25			0205 - M&MC	0	0	1	0	0	10
4/20/2009 8:30:00 AM	Underwater Basket Weaving	66	1		0204 - BJSPH	0	0	0	0	0	10
4/21/2009 9:00:00 AM	Microsoft Excel Basic Skills	12			CA8 - Training Room 382	1	2	5	0	0	5
4/22/2009 1:00:00 PM	Comerstone Administrator Training	8		JORSTAD, KRISTEN	CHI Resource Library	0	0	0	0	0	10
4/28/2009 8:00:00 AM	Comerstone Administrator Training	3			BJSPH POB 2, Room 204	0	1	1	0	0	10
4/28/2009 1:00:00 PM	Comerstone Administrator Training	10			BJSPH POB 2, Room 204	0	0	1	0	0	10
4/29/2009 8:00:00 AM	Comerstone Administrator Training	6		JORSTAD, KRISTEN	CHI Resource Library	0	0	1	0	0	10
4/29/2009 1:00:00 PM	Comerstone Administrator Training	7		JORSTAD, KRISTEN	CHI Resource Library	0	0	1	0	0	10

REPORT CRITERIA :

Date Criteria : 4/1/2009 - 4/30/2009
 Facility : All
 Vendor : All
 Instructor : All
 Event : All
 Location Number : All
 Report Generated By : Kris Jorstad
 Report Date : 4/12/2009

Date Internet

Running an ILT Calendar Report

When you need to see a list of Instructors classes by week, use the ILT Calendar. You can filter by vendor or by event, instructor, and even session status.

Task – Running a Session Withdrawal Report

1. Click on **Report** tab.
2. Click on **ILT** sub-tab.
3. Click on **ILT Calendar Report**.
4. Select the **Vendor**, **ILT Event** and **Advanced Filters** you need.
5. Click on **Search**.



Advanced Filters

ILT Event: (Select a specific event, leave blank to include all ILT events.)

Instructor Name: (Select a specific instructor, leave blank to include all instructors.)

Calendar Date: The Year: (Select Relative Date) OR From: To:

Session Status: Include completed sessions Include tentative sessions

Report Settings

Include in Report: Session Title Session Number Session Location

Search Results

Instructor Name	4/20/2009	4/21/2009	4/22/2009	4/23/2009	4/26/2009	5/1/2009
ALL, WAC						
KONZEL, BRAMP					BR000M - 02:00 PM CDT Computer Exam, ILT Administrative Workshops, Lab K24011, K24012, J. Beers, K24013, Lomax, Lab	
CHURCH, ROBERT						BR000M - 02:00 PM CDT COURSEWARE PRODUCTION PLAN SCUMPRO1 E.L. Learning Institute
DOLAN, SHARI						
FAKKEBOSTON, BELINDA					BR000M - 02:00 PM CDT Computer Exam, ILT Administrative Workshops, Lab K24011, K24012, J. Beers, K24013, Lomax, Lab	
WERTSC, DELEENA					BR000M - 02:00 PM CDT Computer Exam, ILT Administrative Workshops, Lab K24011, K24012, J. Beers, K24013, Lomax, Lab	
LOOPIS, MEVET						
SPICKER, GARY						BR000M - 02:00 PM CDT EMPLOYEE CALENDARING SCUMPRO1 E.L. Learning Institute
WOLFE, KATHY						
WOOD, LISA						