PERSONNEL
DEPARTMENT

DEPARTMENT TRAINING COORDINATOR
ADMINISTRATOR GUIDE
FOR cornerstone

OCTOBER 2023

TABLE OF CONTENTS

ONE SYSTEM INFORMATION

I. ONLINE TRAINING SYSTEMS - WEBSITES

VENDOR	Cornerstone OnDemand
PRODUCTION (LIVE) SITE	http://lacity.csod.com
PILOT (TESTING) SITE	http://lacity-pilot.csod.com

II. LOG-IN INFORMATION

USERNAME	• Employee ID# • LAPD Employees, LAPD[serial] or Employee ID#
DEFAULT PASSWORD	• [Current Year]Cornerstone! (ex: 2023Cornerstone!) • Passwords are not connected to your department's network login. • Passwords are not connected between the Production and Pilot sites. If you change it in one, we suggest changing it in the other.

III. USER RECORDS

A. DATA MAP

1. User records are based on information in Workday.

CORNERSTONE FIELD	WORKDAY FIELD
User ID	Employee ID
Username	Employee ID; LAPD[Police Serial Nbr]; DWP[DWP ID]
First Name	First Name
Last Name	Last Name
Department OU	"FMS Department"-"Division Nbr"
Job Class OU	Job Class
Grade OU	Pay Grade
Cost Center OU	Department Nbr
Full/Part-Time	Full Time Part Time
Original Hire Date	Original Hire Date
Last Hire Date	Probation Begin Date
Email	Employee Email address as listed in Workday
Manager	Direct supervisor as listed in Workday

2. Information that cannot be edited by Training Coordinators in the system will need to be updated in Workday, if it is incorrect.

III. USER RECORDS (Cont'd)

B. UPDATE FREQUENCY

An auto-update has been set up with Workday to add/edit user data weekly on Mondays. This includes adding new employees, moving transfer employees, and changing job classes for promotions or other changes. If an employee is newly added to the City, they will not be added to the platform until they are added into Workday. It may take a week or two for the information to show in Cornerstone.

C. TRANSFER EMPLOYEES

1. Since only user data is updated, transcripts are maintained as employees move from department to department.
2. The only exception is employees coming from or going to DWP because they do not use the same payroll system as the rest of the City. So user data cannot be tied to the Employee ID.
    a. New accounts are created for transfer employees, either during the regular update (employees coming from DWP) or during the DWP update (employees going to DWP).
    b. Data from the existing transcript can be merged by contacting pertraining@lacity.org.

IV. ORGANIZATIONAL UNITS

A. CORNERSTONE OUS

1. The training system places users into Organizational Units (OUs), based on the following fields:
    a. Department *(FMS-Division Nbr)*
    b. Cost Center *(Department Nbr)*
    c. Job Class *(Job Class)*
    d. Grade *(Pay Grade)*
2. This data is fed from Workday (mapped above).
3. For each OU type, a user can only be assigned one at a time.

B. CORNERSTONE GROUPS

1. Users can also be placed in custom User Groups created by Training Coordinators/admins.
2. A user can exist in any number of groups at one time.

C. HIERARCHIES & SUBORDINATE OUS

1. The Department, Cost Center, and Grade OUs, as well as User Groups, have hierarchies built in.
    a. There can be any number of subdivisions and each is nested under a parent OU or Group.
    b. When you see the option to "Include Subordinates" for an OU or Group, this is not referring to a user's manager or reporting relationship. This refers to the OUs/Groups nested under the one you selected.
2. The Job Class OU does not have a hierarchy set.
    a. Job Class hierarchy utilizes the Grade OU.
    b. Career ladders and such are built in a different module.

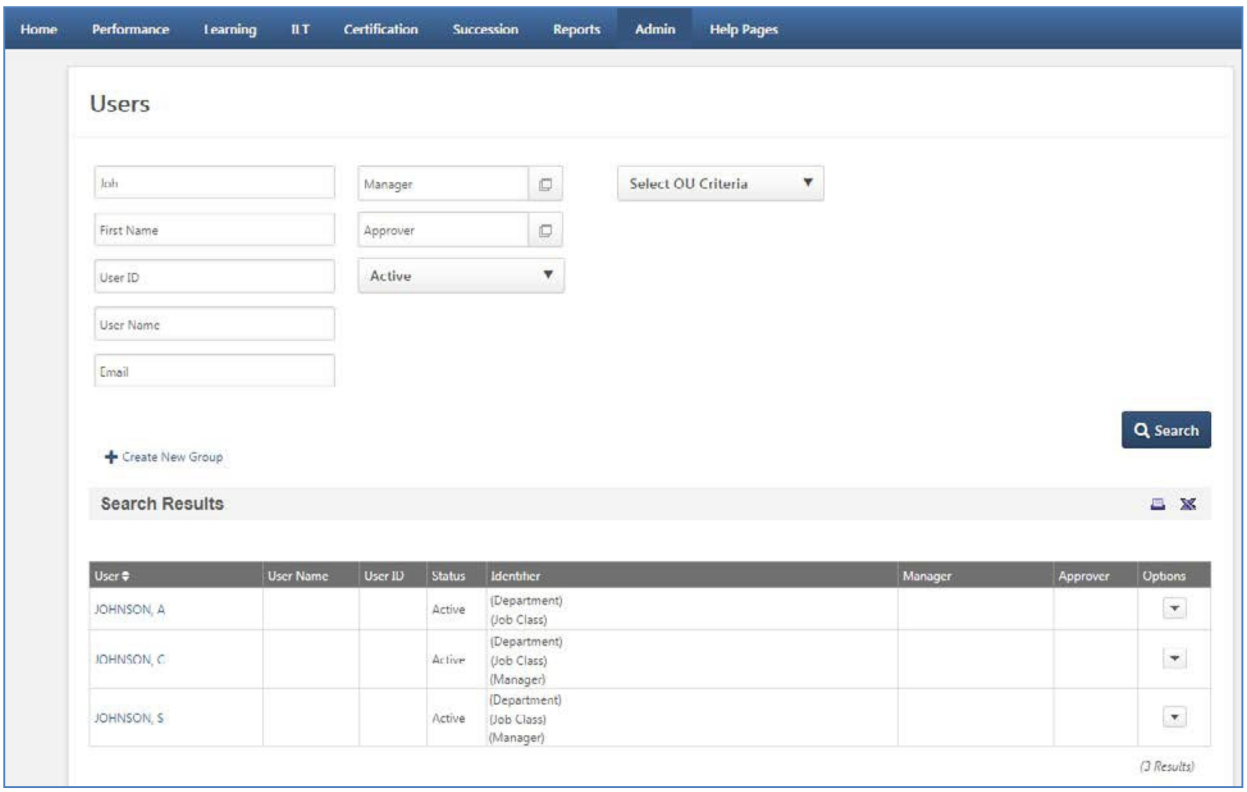
TWO USER BASICS

I. USER SEARCH

A. USER SEARCH PAGE

1. Hover over the **Admin** tab and click on **Users**.
2. Records can be found using any of the search fields.
   a. Partial values can be used, but only the start of the name or number.
      - *Example*: “Johnson” can be found using “Joh”
      - *Example*: Employee ID “23456” can be found using “23”

   b. If you are searching for an inactive user, you must change the “Active” selection to “Inactive” or “All”.
3. All results matching your search criteria will be displayed at the bottom of the screen.



II. UPDATE RECORD

A. USER RECORD PAGE

1. Most information is fed from Workday, but admins are able to manually update an employee’s email, manager, and user status.
2. After you have found the employee you are looking for, click on their name in the search results.
3. You will be brought to the User Record page.

II. UPDATE RECORD (Cont'd)

B. EDIT RECORD

1. Click on the **Edit Record** button on the bottom right of the screen.
2. You can change the following information.
   a. Status – A radio button set to either **Active** or **Inactive**
   b. Email – Typed directly into the field
   c. Manager – Changed by clicking the options button ( ) and finding the correct manager in the search window that opens
3. Once changes are made, press the **Save** button on the bottom right corner of the screen.

III. CHANGE PASSWORD

A. FORGOT PASSWORD EMAIL

1. Once an employee's email is in the system, they can use the "Forgot Password" feature on the login page to reset their password.

B. MANUAL PASSWORD CHANGE

1. If the user does not have an email or cannot access it, TCs can manually reset the password.
2. After you have found the employee you are looking for, click on the options drop down menu ( ) to the right of their name.
3. Select the **Change Password** option.
4. A new window will open.
   a. The first option is to send the password-reset email.
   b. To reset it manually, select the **Define a temporary password** and press **OK**.
5. On the Change Password page, you will type the new temporary password.
   a. We recommend using the password (Password1), but anything that meets the criteria will work.
   b. The user will use this temporary password for an initial login and be required to change it once they have logged in.

C. MANUAL PASSWORD CHANGE

1. If you are on the User Record page, you do not need to go back to the User Search page.
2. The **Change Password** tool can be found in the options menu ( ) at the top-right.

IV. UNLOCK ACCOUNT

A. SECURITY LOCK

If a user is unable to login after 5 tries, they are locked out of the system for 5 minutes.

B. MANUAL UNLOCK

1. If they cannot wait, you can unlock the account from the User Search page.
2. When you click on the options drop down menu ( ) there will be an option to Unlock Account.
3. Select the option and click **Yes** to confirm.

V. PROXY AS USER

A. WHAT IS PROXYING AS A USER?

Sometimes, you will need to proxy into an employee's account. This will log into their account from your computer and will mirror what it would look like if the user was actually logging in from your workstation. This can be used to request a single course for a user or to trouble-shoot course issues.

- An example would be if the employee claims that the course does not load. You can proxy in from your desktop. If it loads, you can be pretty sure that the issue is with the employee's browser or Internet connection; and not the system

B. HOW TO PROXY AS A USER

1. To proxy in from the user search page, click on the options drop down menu ( ) to the very right of their name and select the option to **Proxy as Another User**.
2. On the Proxy page, enter a reason in the comment box. *This is required*.
3. Click on the **Log In** button.
    a. **NOTE**: If the user is logged in, then proxying into their account will kick them out of the system while you are viewing their account.
4. A new page/window will open indicating that "You are now logged in as [User's Name]".
    a. Any actions you take as the user will be reflected when the employee logs back in.

THREE TRANSCRIPTS

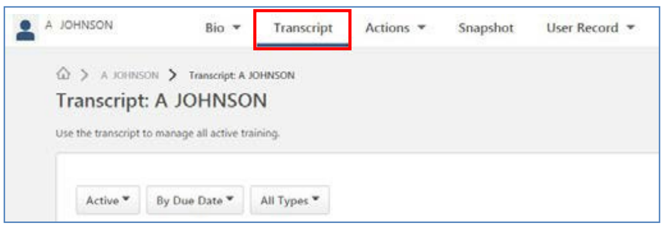
I. VIEW USER TRANSCRIPTS

A. TRANSCRIPTS FROM THE SEARCH PAGE

1. Find the employee you want to view on the User Search Page.
2. Click on the options drop down menu ( ) to the very right of their name and select the option to **View Transcript**.

B. TRANSCRIPTS FROM THE USER RECORD

1. If you are on their User Record already, you can navigate to their Transcript from there by using the link at the top.



II. TRANSCRIPT SECTIONS

A. NAVIGATING THE TRANSCRIPT

1. When you navigate to an employee's Transcript, you are automatically brought to the Active Training Section. To find the other sections, click on the **Active** selection in the drop down menu, and change it to the section you are looking for.

B. ACTIVE

This is the list of current training that the employee has not completed yet. The options menu for active courses includes:

1. **Open Curriculum**: Appears if the training consists of multiple parts; opens to the next level to see the individual parts of the curriculum.
2. **Remove**: Select this option if for whatever reason, you need to take this training off the user's Transcript.

   If the employee has completed the course before the current registration, you will be given the option to 'roll back' the training to a previous completion.

   Otherwise, removing the training will prompt you to put a reason, and the training will be placed in the Removed section
3. **View Training Details**: *Information on this option is included below.*

C. COMPLETED

This is the list of training that the employee has completed recently or was recently moved from the Archived section. The options menu for completed courses includes:

1. **View Completion Page**: Displays the page that was shown to the user when they completed the course.
2. **View Certificate**: Opens the completion certificate in a new window; can be downloaded as a PDF or printed directly

3. **Open Curriculum**: Appears if the training consists of multiple parts; opens to the next level to see the individual parts of the curriculum.
4. **View Training Details**: *Information on this option is included below.*

D. ARCHIVED

Both Active and Completed training are automatically archived if it is not accessed within a year. The option menu is the same as Completed courses.

E. REMOVED

Training that was manually removed by an admin will be placed into this section.

1. Only incomplete/in progress training can be removed.
2. Only admins can see the removed training section.
3. The options menu includes:
   a. **Restore to Transcript**: Moves the training back to the Active section; also retains the user's progress in the course.
   b. **View Training Details**: *Information on this option is included below.*

F. USER LAUNCH OPTION – ACTIVE TRANSCRIPT

When a user is logged in, they have an additional option to launch the course.

1. **Launch**: Opens the course in a new tab. If the course is part of a curriculum, you must Open Curriculum first.
2. **Inactive**: If a course is no longer active, the Launch option will be replaced by the word Inactive, and the course will be put into the Archived Transcript.

G. USER LAUNCH OPTION – COMPLETED TRANSCRIPT

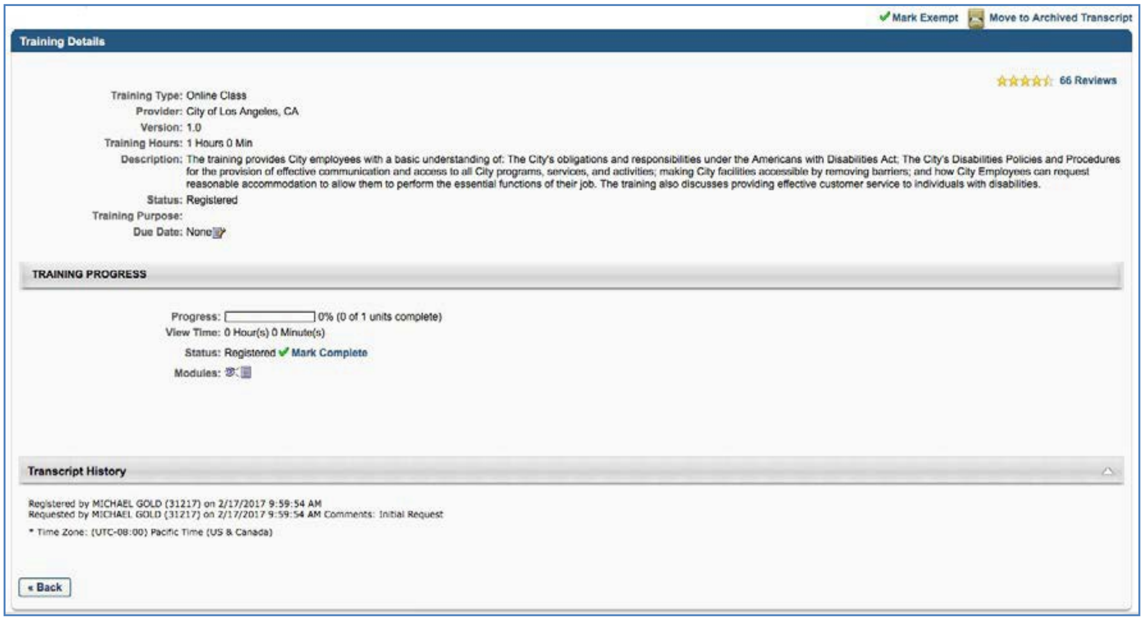
In the User's Completed Transcript, they have an additional option to launch the course. If the user launches the course from here, they will be reviewing the course that they have completed. They will NOT be given a new completion date or certificate, if they view the course from their Completed Transcript.

For the user to receive a new completion date / certificate, you can assign the course to them using the Learning Assignment Tool (page 15). Or the employee can search for the course themselves, and click the 'Register' button to re-register for the course.

III. TRAINING "VIEW TRAINING DETAILS" PAGE

A. VIEW TRAINING DETAILS

1. The Training Details Page gives details on the training specific to this user.
2. From the Transcript, select View Training Details from the drop down menu to the right of the course name.
3. The sections and contents of the training details page vary slightly based on the type of training that you are viewing and the course status.



III. TRAINING "VIEW TRAINING DETAILS" PAGE (Cont'd)

B. TRAINING DETAILS

1. This includes the general course information and current transcript status.
2. Available actions include:
   a. Edit Due Date
      - For training that is still active, the due date for an individual user can be changed here.

   b. View Completion Page & Print Certificate
      - For completed courses, these are also available in the options menu of the completed courses page.

   c. Mark Exempt
      - Only use the Mark Exempt option if the employee is exempted from ever having to take a course. This is rare. If a user does not need a training, we generally use the Remove option in the active courses page (page 4).
      - Marking Exempt will put the training under the employee's Completed Transcript, but it will show up in reports as 'exempt'. *Located at the top right, above the Training Details line.*
      - ***There is no undoing this action***.

   d. Move to Archived Transcript/Activate
      - You can manually move a training in and out of the Archived section of the transcript using these options.
      - "Move to Archived Transcript" shows when a course is in the Active or Completed sections. "Activate" shows when it is in the Archived section. *Located at the top right, above the Training Details line.*

C. TRAINING PROGRESS

1. This details information on the user's progress of the training.
   a. For courses, the progress is either 0% or 100%.
   b. For curricula, it varies based on the number of items in the curriculum.

2. Other items show when the user last opened the course, how many times it has been opened, and how long it was open.
3. Mark Complete: Admins have the option to manually mark a training item complete. Clicking this option will mark the training complete on the date you click it. You will need to provide a reason for doing so, which will appear in the Training History.
   a. ***There is no undoing this action.***

D. CURRICULUM

1. This section appears if a Learning Object is a curriculum.
2. A listing of all the curriculum parts will be shown. To view the Training Details Page for any of the parts, click on the Details icon ( )
3. Available actions include:
   a. Due Date: Due dates can be added to individual parts. However, if a due date is set for the whole curriculum, then these must all be before the final due date.
      - Type the date in the **Due Date** field to the right of the part name.
      - After typing in all the necessary dates, click **Save** at the bottom to complete.

   b. Activate: Normally, curriculum parts are automatically activated in a specific order as the sections are completed. However, admins can activate any parts by clicking on the **Activate** option to the right of the part name.

   c. Mark Exempt: This option should rarely be used. If the employee was assigned the curriculum, they are expected to complete each module. However if the employee is exemptetd from ever having to take a certain module, one could be marked 'Exempt' by an admin.
      - ***There is no undoing this action.***

E. ASSIGNMENT & VERSION HISTORY

1. This section will show all instances the employee was assigned the course. Any/all completions will be shown, how it was assigned, and any corresponding dates.
2. Click on the expand arrow ( ) to the right of the section title to open the information.
   a. This will include when it was requested, registered/assigned and completed (if done). It will show all iterations of the training, all completions, etc.
   b. View the ( ) icon to find the completion certificates and their exact date/s.

F. TRANSCRIPT HISTORY

1. This section shows the history of the current assignment.
2. It will indicate when it was started, how it was assigned, if it was ever removed, archived, or reactivated.
3. Comments from manual exemptions or completions by the admin will also be listed.

FOUR USER GROUPS

I. CREATING A NEW GROUP

A. GETTING STARTED

1. Hover over **Admin** tab and click on **Org Units**.
2. Click on **Manage Organizational Unit Hierarchy**.
3. Click on **Add Group**.

II. DEFINE GROUP & DETAILS

A. NAME

*Required – This title will be displayed on the group hierarchy list and can be used when searching for it later.

B. ID

This is not required, but is recommended to make it easier when searching for the group.

C. DESCRIPTION

If it is unclear from the name, a description of who is in the group or what it will be used for can also be included.

D. PARENT

Click on the options button ( ) and a new window will open.

1. Click on the name of the main group for your department, "Groups – [Department Name]".
2. If you there is not a main group for your department yet, define these details and save the group with no user criteria. This will be an empty group at the top tier of your group hierarchy.

E. OWNER

You may leave this blank or select yourself.

F. ACTIVE

Leave checked to be able to use the group. If you no longer need the group, you can deactivate it by unchecking this box.

G. FREEZE GROUP PROCESSING

This is used if you want the group to process once and not update. Generally, this is left unchecked.

III. GROUP CRITERIA

A. ADDING INDIVIDUAL USERS

1. This is used if there are a fixed set of users in your group that do not have any common factor, such as division or job class.
   a. Normally not suggested for large groups because it is difficult to maintain.
   b. Users can transfer out of your department, but will remain in your group until you remove them manually.
2. To add users individually:
   a. Click on the person icon ( ) and a new window will open.
   b. You will be shown a list of all the employees in your department.
      - You can filter using the search fields at the top.
   c. Click the blue plus sign ( ) next to the user you want to add to the group.
   d. Continue until all the users you need have been selected.
   e. Click the **Done** button to finish.
   f. Click the **Save** button to complete.
3. To remove a user from the group:
   a. Scroll through the list of names to find the user you want.
      - They are alphabetical by last name.
   b. Click on the delete icon ( ) to the left of the user's name.
   c. Click the **Save** button to complete.

B. ADDING USERS BASED ON ATTRIBUTES

1. This is used to create a dynamic group that changes based on user updates. New employees meeting the criteria you set will automatically be added to the group and those that don't meet it anymore will be removed.
2. To add a set of criteria:
   a. Click on the blue plus sign ( ) next to Group Criteria and a new window will open.
   b. Select the attribute that you want to filter by.
      - Commonly used are Department, Job Class, Grade, or Full/Part-Time status.
   c. A new line will be added to your criteria.
   d. From the drop down, select which option you need.
      - Hierarchy Options
        » Below
        » Is
        » Is not
        » Is not or below (means "do not include this or anything below this")
        » Is or below (means "include this and everything below this")
      - Value Options
        » Equal to
        » Not equal to

III. GROUP CRITERIA (Cont'd)

B. ADDING USERS BASED ON ATTRIBUTES (Cont'd)

e. Next to the value field, click on the attributes button ( ) and a new window will open.
   - You can filter using the search fields at the top.

f. Click the blue plus sign ( ) next to the value you want.

g. Continue until all the values you need have been selected.

h. Click the **Done** button to finish.

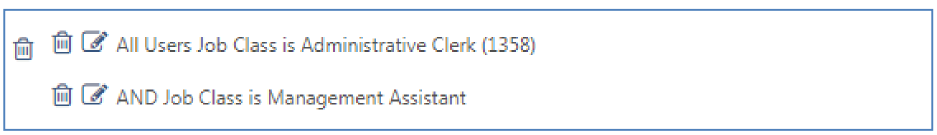
i. Click the save icon ( ) to complete this line.

j. Click **Save** button to complete.

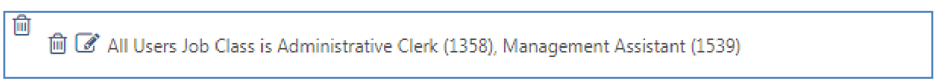
C. ADDING MULTIPLE CONDITIONS & CRITERIA

1. Multiple conditions can be added to one criteria line.
   a. EXAMPLE for "Full-Time Administrative Clerks in Divisions 960 and 970" is below

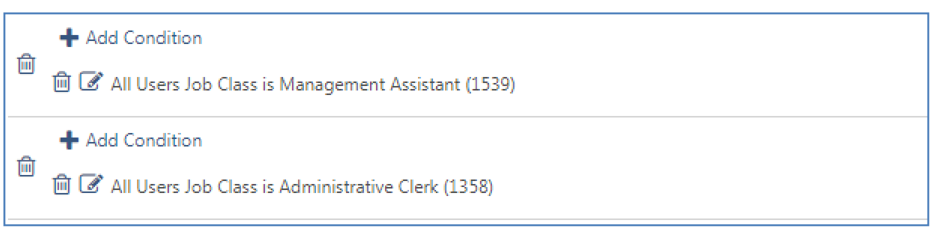
2. Do not include more than one line for any type of attribute in a single criteria group. This will yield no results because, for example, no employees can have more than one Job Class or be in more than one Department.
   a. EXAMPLE: Will not work



   b. EXAMPLE: Will work



3. Alternatively, you can add a new criteria line to add multiple values for a single attribute. Notice that the multiple criteria lines are separated by the gray line.



III. GROUP CRITERIA (Cont'd)

C. ADDING MULTIPLE CONDITIONS & CRITERIA (Cont'd)

4. Any number of criteria lines with multiple conditions can be added to a group.
   a. In the example below, the first criteria line is looking for all users in the Personnel – Administrative Services division that are Full Time Management Assistants.
   b. The second criteria set will look for users in the Personnel – Employment Services division who are Part Time Administrative Clerks.
   c. The group will be a combination of all these users.

D. NOTE

Groups can take up to five minutes to process. They normally refresh when user records are updated or when changes are made to the group criteria.

IV. MANAGE GROUP OPTIONS

A. USERS ( )

After the group has processed, this will show a list of users that meet the criteria that you specified.

B. EDIT ( )

If you need to make changes to your group, click this icon to go to the edit page. It will look and function just like the create page, but will already have the values you set for the group.

C. COPY ( )

If you want to make another group with similar criteria, you can select this option. You must give it a new name, ID, and description. If your group only had individual users added, these will not be brought over and the copied group will be blank.

FIVE LEARNING ASSIGNMENT TOOL

I. CREATING A NEW ASSIGNMENT

A. GETTING STARTED

1. Hover over **Admin** tab and click on **Learning Assignment Tool (LAT)**.
2. On the "Learning Assignment Tool" main page, click on the **Create Assignment** button.

II. SET-UP

A. ASSIGNMENT TYPE

1. **Standard** will process one-time only. This is best for assignments to a small group of users that need one or two courses assigned to them.
2. **Dynamic** will process continuously/periodically. This is best for assignments to groups, job classes, or divisions. As users are added to the groups or hired/transfer/promote into these OUs, they will automatically be assigned the training through the Dynamic Learning Assignment.

B. ASSIGNMENT TITLE

*Required – This title will be displayed on the Manage Learning Assignments page and can be used when searching for it later.

C. ASSIGNMENT DESCRIPTION

Provide a description of your training assignment. For you and other TCs in your department to know what the assignment was for.

D. TRAINING SELECTION

1. Click on the **Select Training** button and a new window will open.
2. Type in training title or use the **Apply Filter** function to search for training using any search field.
3. Check the box next to the training(s) you would like to assign.
   a. There is no limit to the number of learning objects you can include here.
4. Click the **Select** button on the bottom right corner when you are done.
5. These will be placed back on the main screen. Review your selected training under the Training Selection section.
6. **IMPORTANT REMINDER**: As a Training Coordinator, you will have access to see and assign any learning object in the system, even those that are not available to your department and are the individual parts of a curriculum.
   a. For consistency, do not assign individual curriculum parts. It will create issues with reporting. Always assign the whole curriculum.
   b. DO NOT assign training created by other departments.

III. NOTIFICATION OPTIONS

A. TRAINING ASSIGNMENT WORKFLOW

Unless your department has set up an approval workflow, select the **Assigned, Approved, and Registered** option.

B. PREREQUISITE OPTIONS

Unless you are utilizing prerequisites for a training, leave this box unchecked.

B. EMAIL SETTINGS

1. There are already default emails that will be sent to the user to let them know they have been registered and that training is due (if a due date is assigned).
2. If you wish to use Custom Emails, please contact Employee Development to provide you separate training on how to set up these emails.

IV. SCHEDULE OPTIONS

A. PROCESSING FREQUENCY

1. You will only see this if you are creating a dynamic assignment.
2. Usually, this should be kept as ‘Daily’. This will ensure your Dynamic Assignment will keep updated daily with current information.

B. PROCESSING START UPDATE

1. Select when you would like the LAT to begin assigning the training. This is usually kept as ‘As soon as Assignment is Submitted’.
2. Some people may choose to delay the assignment if there is a compliance period the training must be completed within.

C. TRAINING DUE DATE

1. If the training has a due date, please indicate so here.
2. A specific date or date relative to the assignment (i.e. 30 days after Date Assigned) can be used.

C. RECURRENCE

1. You will only see this if you are creating a dynamic assignment. If the training needs to be retaken regularly, you can set an automatic reassignment here.
2. Relative Date or Annually: Can be reassigned based on original assignment date, completion date, or fixed calendar date. Other options available as well.
3. End Date: Used if you want the recurrence to stop after set time.

V. USERS

A. USER CRITERIA

1. OPTION 1: SELECT USERS:
   a. Click on **Select User** button.
   b. You have the option to search individual users, divisions, job classes, or pre-made groups.
      - NOTE: *Individual users are used more with Standard assignments and Groups/OUs are used with Dynamic ones.*
   c. Enter any criteria into the search fields and click **Apply Filter**.
   d. Check the box by the user/group/OU you would like to assign the training to.
   e. Continue until all the users/values are selected.
   f. Click the **Select** button on the bottom right corner when ready.
2. OPTION 2: UPLOAD USER LIST:
   a. Create an Excel spreadsheet of User IDs and save as .csv format.
   b. Click on **Select File** to locate spreadsheet and click **Upload File** when ready.
   c. This option should only be used for Standard assignments, as you cannot add users directly to the learning assignment after it has been submitted.

B. ASSIGN NEW OCCURENCE

Click this option if you want employees who already have this training on their Transcript to be assigned it again now. Unless you choose 'Maintain Progress,' the assignment will overwrite previous training. You also have the option to override prior due dates for trainings that are being reassigned

C. GENERATE INITIAL USER LIST

1. This will show you a list of users that will be assigned the training(s) at the bottom of the page.
   a. The users who will have the course assigned to them will have check box by their name.
   b. If there is no check box, they already have course assigned.
2. Uncheck the box next to anyone who *does not* need the training.
3. If all entries are correct, click **Next** to continue.

VI. CONFIRM

A. REVIEW DETAILS

Review the details of the learning assignment by clicking on down arrow to the right of each section.

B. SUBMIT

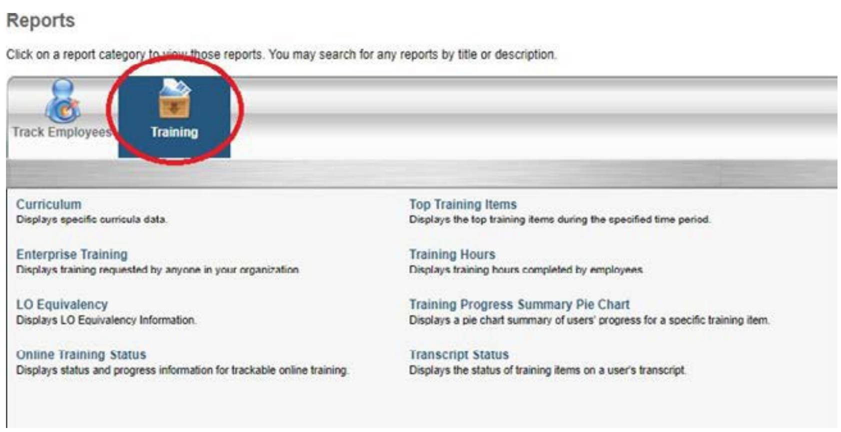
Click the Submit button to process the learning assignment. You may also click the **Save Draft** link on the bottom left to save a draft of the assignment, which can then be accessed and edited later.

SIX REPORTS

I. STANDARD TRAINING REPORTS

A. GETTING STARTED

1. The system includes a handful of canned reports that can be used to check the status of training for any set of users. All the reports are basically the same, but differ in how things can be filtered.
2. Hover over the **Reports** tab and select **Standard Reports**.
3. Click on the **Training** tab.
    a. The Track Employees tab is for managers to pull data on their subordinates. So if you do not have the reporting relationships built into the system, this will not yield any results.
4. The **Date Criteria** in Standard Reports always refers to <u>Registration Date</u> because you are pulling all statuses and not just completions.



B. TRANSCRIPT STATUS

The Transcript Status Report generally gives you information regarding a training for a group of users, like your department. You can filter for certain training statuses, <u>but you will only get information for users who have the training in their transcript</u> (if it hasn't been assigned to them, it will not be in the report).

1. Date Criteria: This will be the date range of the Registration date, or the date the training was put onto the user's transcript. Set the time frame you are looking for, or remove dates to pull all data.
2. User Criteria: You can filter the report by any OU or Group.
    a. Select the OU/Group type from the dropdown menu.
    b. Click on the attributes button ( ) to open the search window.
    c. You can search for specific OUs/Groups using the fields at the top or you can look through the hierarchy.
        - Click on the white plus sign ( ) to view the groups below.
        - Click on the blue plus sign ( ) to add that OU/Group to the search.
        - Any number of OUs/Groups can be added to the search.
    d. Click on **Done** to add these OUs/Groups to your report.

I. STANDARD TRAINING REPORTS (Cont'd)

B. TRANSCRIPT STATUS (Cont'd)

3. Advanced Criteria
   a. Training Type: Generally keep as all, but can be used to only look for a specific type of learning object.
   b. Training Title: You can add one specific training title if you are looking for something specific or you can leave it blank to retrieve all training titles.
   c. Click the check boxes next to items you wish to include. Recommended is including the completion date and including inactive users. Notice the option to "include all records of this training" – this option will not only show the most recent registration of training, but will include all instances it was completed as well. You can include this option, then sort your end report by completed first, then remove duplicates – if you want to find any previous completions of a training.
4. Filter by Training Status - All statuses are defaulted as checked. You can include all here, then sort the final report, or you can choose which statuses should be included in your report here.
5. Include Custom Fields – leave blank.
6. You can title the report, to access later if you want. Note that, if you come back to this report later, you'll want to refresh it before downloading the Excel sheet. Also, note that any date criteria you set in your original report will stay the same, unless you change it.
7. Click Process Report, and wait until your report finishes running under 'Processed Reports'. When finished, click the green 'x' to download the Excel sheet.

C. TRAINING PROGRESS SUMMARY PIE CHART

This report allows you to see the status of a single training on users' transcripts. This is the only Standard Report where you can include users who do not have the training on their Transcript yet (not yet assigned).

1. Date Criteria: Like all Standard Reports, this date range is of the Registration Date, or the date the training was put onto the user's Transcript. Set the time frame you are looking for or leave bank to pull all data.
   a. If you use one of the pre-sets in the dropdown, it will be locked in. If you change your mind, you must refresh the page to reset the date criteria.
2. User Criteria: You can filter the report by any OU or Group.
   a. Select the OU/Group type from the dropdown menu.
   b. Click on the attributes button ( ) to open the search window.
   c. You can search for specific OUs/Groups using the fields at the top or you can look through the hierarchy.
      - Click on the white plus sign ( ) to view the groups below.
      - Click on the blue plus sign ( ) to add that OU/Group to the search.
      - Any number of OUs/Groups can be added to the search.
   d. Click on **Done** to add these OUs/Groups to your report.

I. STANDARD TRAINING REPORTS (Cont'd)

C. TRAINING PROGRESS SUMMARY PIE CHART (Cont'd)

3. Advanced Criteria
   a. Training Title: You must select a training title for this report.
   b. Transcript Status: This is the box you would check if you want to include all users within the criteria you set, even the ones who do not have the training assigned.
   c. User Status: Check if you want to include all Inactive Users.
   d. Equivalent Training: Check the boxes for the options you want to include in regard to training that may have equivalent learning objects in the system.
   e. Include Removed Training: Check to include training that was removed from an employee's Transcript.
   f. ILT Training: If you are looking for Instructor-Led Training, select the option that you are looking for. Otherwise, leave as **Events and Sessions**.
4. When ready, click the **Search** button at the bottom.
   a. A pie chart and data will be displayed at the bottom of the screen.
   b. Options to Print ( ) and Export ( ) the data will be made available.
      - The pie chart will not appear in the Excel file. A summary table will be shown in its place

D. ONLINE TRAINING STATUS

This report is similar to the Enterprise Training Report but only looks at online training learning objects and does not let you filter statuses or training titles.

1. It will include all Active Users based on the User Criteria you select.
2. It does not include Instructor-Led Training or Materials.
3. Does not display results on screen first. After selections are made, data is either printed or exported to Excel only.

E. ENTERPRISE TRAINING

The Enterprise Training Report has the most filters in the Standard Reports. However, you cannot find users who do not have the training assigned.

1. Criteria: Set the time frame you are looking for or remove dates to pull all data.
2. Criteria: You can filter the report by any OU or Group.
   a. the OU/Group type from the dropdown menu.
   b. on the attributes button ( ) to open the search window.
   c. can search for specific OUs/Groups using the fields at the top or you can look through the hierarchy.
      - on the white plus sign ( ) to view the groups below.
      - on the blue plus sign ( ) to add that OU/Group to the search.
      - number of OUs/Groups can be added to the search.
   d. on **Done** to add these OUs/Groups to your report.

I. STANDARD TRAINING REPORTS (Cont'd)

E. ENTERPRISE TRAINING (Cont'd)

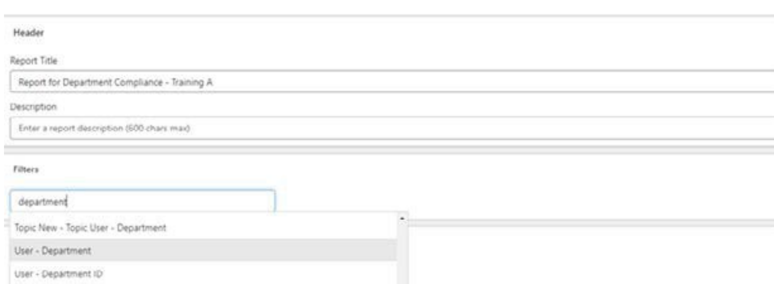
3. Criteria
   a. Type: Generally keep as all, but can be used to only look for a specific type of learning object.
   b. Click the checkbox next to all the statuses you want to retrieve.
   c. Title: You can add one specific training title if you are looking for something specific or you can leave it blank to retrieve all training titles.
   d. Leave as **All**
   e. Date: Check if you want the completion date for training that has been finished.
   f. Training: Check if you want to include any training that gives the same credit.
   g. Training: If a training is recurring, check the box to see the status for all assignments on users' records. Leave unchecked if you only want to see the current status.
   h. Training: Check to include training that was removed from an employee's Transcript.
   i. Status: Check if you want to include all Inactive Users.
4. ready, click the **Search** button at the bottom.
   a. will be displayed at the bottom of the screen.
   b. to Print ( ) and Export (/) the data will be made available.

II. REPORTING 2.0

A Transcript Report shows the training records on a user or set of users' Transcript. The Standard Training Reports are basically pre-set Transcript Reports. If you want to run a report with customized columns or criteria that are not available in the Standard Reports, you will need to build out the report in Reporting 2.0.

A. CREATE A NEW CUSTOM TRANSCRIPT REPORTS USING REPORTING 2.0

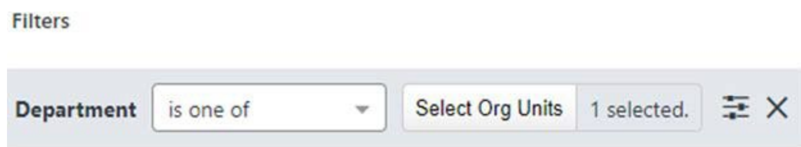
1. Hover over the **Reports** tab and click on **Reporting 2.0**.
2. Click on **Create Report**.
3. **Title and Description**: Enter the title of the report as well as any description. This can be a great place to put any notes on the training or frequency you need to run the report.
4. **Filters**: You can search for tons of different filters in the reports. Below is an example of some common/basic filters to you.
   a. If you are searching for your department, type in department and select the "User - Department" option. You can also select "User - Department ID" if you want to run a report for a specific division of your department. Note: You might need to scroll to find this option since "User" is towards the bottom of the list.



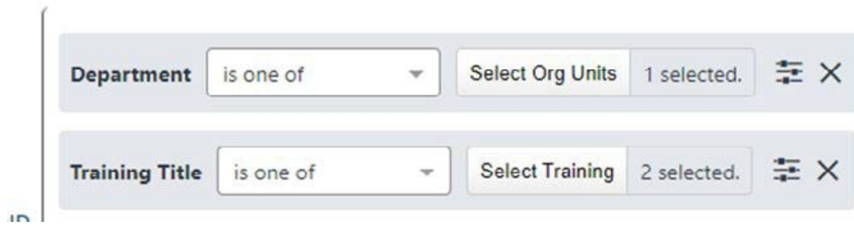
II. REPORTING 2.0 (Cont'd)

A. CREATE A NEW CUSTOM TRANSCRIPT REPORTS USING REPORTING 2.0 (Cont'd)

b. Click on the Select Org Units button. Here is where you can select the department or specific division you want to report on. You can choose more than one department/division if you wish.

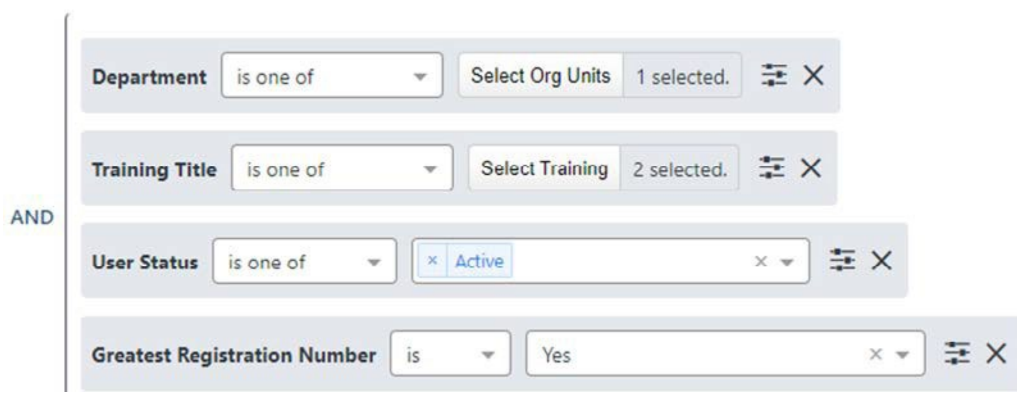


c. You can then add a filter for the training(s) you wish to report on. Do this by adding the filter – Training Title and selecting the trainings in question from the Select Training button. In the below example, I have selected two trainings.



d. The way the report is set up now will pull transcript data for *All* employees in your department related to the trainings you selected. You can add more filters if you would like, or just sort/ filter after exporting to Excel.

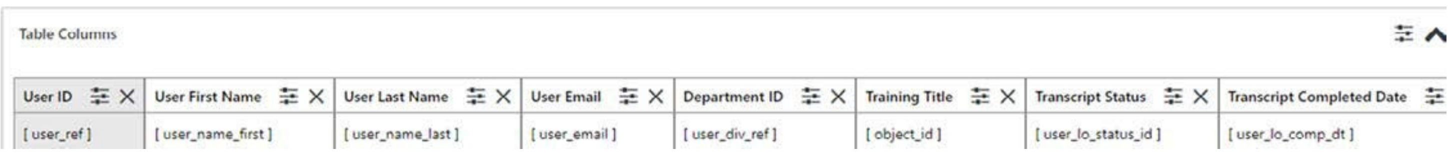
e. Recommendations: We recommend adding filters for User Status to ensure that you are only selecting Active employees, as well as Greatest Registration Number = YES. This ensures that you are only pulling the most recent registration for the training that the employee has on their transcript. This helps if you know an employee may have been assigned the training more than once (recurring trainings).



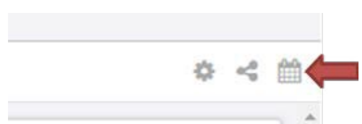
II. REPORTING 2.0 (Cont'd)

A. CREATE A NEW CUSTOM TRANSCRIPT REPORTS USING REPORTING 2.0 (Cont'd)

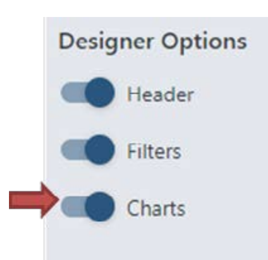
5. **Columns**
   The filter described in the above section asks for the criteria you want the report to consider. The columns is where you tell Cornerstone the user/data information you want to appear for the users that fall within your report criteria.
   a. You can add as many columns as you wish by searching for them or dragging them from the side menu. Common columns likely include Username/UserID, User First Name, User Last Name, Training Title, Transcript Status, Email Address, Department/Department ID, Completion date, etc. Be sure to select the correct column title. Most columns you will want will start with "User" and will appear towards the bottom of the list. Below is an example of some common columns to enter.



6. You can always drag your columns around if you want them to appear in a different order.
7. **When your report is ready to go, click save**. You will be asked what type of report you are saving. Select Transcript report.
8. You can close out the report and it is saved under My Reports in your Reporting 2.0 for when you want to run it.
9. **Extra features - Scheduling**: Some extra features that you can use in Reporting 2.0 are scheduling your reports to automatically run/refresh on a schedule and email the report directly to your email address (as listed in Cornerstone). Select the calendar option on the top right of the report for scheduling settings.



10. **Extra Features – Charts**: If you want a chart to be included in your report, select the Settings option on the top right and turn on "Charts" at the bottom of the menu. This will add a chart section to your report where you can specify the chart set up.



II. REPORTING 2.0 (Cont'd)

A. CREATE A NEW CUSTOM TRANSCRIPT REPORTS USING REPORTING 2.0 (Cont'd)

10. Extra Features – Charts (Cont'd)

Note: The Personnel team does not often use the Chart feature in these reports, as we often need to create our own after filtering in Excel. We encourage you to mess with this this feature if you are interested in learning more.

11. As mentioned previously, reports you create will be saved under the My Reports section in Reporting 2.0. If you want to run the report manually, click the "Schedule for Now" or "Download to Excel" buttons to the right. You can also always go back and edit a training later if you wish.
12. If you want to have the same report for another training but do not want to build out a report from scratch, you can copy and of your reports and save them as their own by selecting Copy from the 3 dots next to the training. Because each training has different due dates, recurrence schedules, etc., we recommend having a report for each major training. However, this option is up to you.

Reminder: The custom report walk through above is for custom transcript reports in Reporting 2.0. Only users who have the selected trainings on their transcript will be included.

Although this is the most common type of custom report to run, please remember this was only a sample. Reporting 2.0 has various reporting filters, columns, criteria, etc. We encourage you to build out reports that fit your needs and make it easier to report compliance for your department.

SEVEN LEARNING TOOLS

I. TRAINING UPDATE TOOL

This is used to update the status of a single training title for a large group of users at one time.

A. GETTING STARTED

1. Hover over the **Admin** tab and select **Tools**.
2. Click on the **Learning** option.
3. Click on **Training Tools**.
4. Click on **Training Update Tool**.

B. CREATE A NEW TRAINING UPDATE

1. To complete a new update, click on the **Training Update**.
2. Select Training
   a. In the Keyword search box, type part or all of the training title and press **Search**.
   b. The Search Results will appear at the bottom. Click blue plus sign ( ) next to the course you are looking for.
3. Upload Users, Statuses, and Scores
   a. You will need to create a spreadsheet of the users you are updating with the following four columns.
      - A: User ID
      - B: Score (0-100)
      - C: "Y" to mark the item complete
      - D: Completion Date (format mm/dd/yyyy)

   There is a limit of 2000 users per file.

   b. Save the file in .csv format
   c. Click on the **Choose File** option and find the file you just made in the file chooser window.
   d. Click **Add** to include this file in your update.
      - If there are any errors in the file, a View Errors link will appear.
         » Some errors may include invalid/inactive users or incorrect date format.
         » You can move forward with the correct items or fix the file and try again.
   e. Click **Next** to continue.
4. Confirm Request
   a. You will see the names of the users and update data that you included in the spreadsheet.
   b. You will also see the users' current status in the training course.
   c. If you wish to exclude one of the users from the update, uncheck the box to the left of their name.
   d. Leave any comments, such as where the data is coming from, and click **Submit**.

I. TRAINING UPDATE TOOL (Cont'd)

C. PROCESSING A TRAINING UPDATE

1. You will be brought back to the Training Update Tool main page and see your update in the queued list at the bottom.
2. It will take between 5-15 minutes for the updates to process, depending on the number of records being updated.

II. TRAINING REMOVAL TOOL

This is used to remove a single training item from multiple users at once. This can be used if training was accidentally assigned to the wrong group or if training is no longer active and needs to be removed.

A. GETTING STARTED

1. Hover over the **Admin** tab and select **Tools**.
2. Click on the **Learning** option.
3. Click on **Training Tools**.
4. Click on **Training Removal Tool**.

B. CREATING A NEW TRAINING REMOVAL JOB

To create a new removal job, click on **Create New Training Removal Job**. You will have the option of either 'Remove by search criteria', or 'Remove by CSV upload'. Choose your preferred method, and name the Removal Job. Click Next.

1. Remove by search criteria:

a. Training
   - Find the training title. Use the filters to narrow down your search.
   - The results will be displayed at the bottom.
   - Click on the blue plus ( ) next to the training title you want to remove.
   - Click **Next** to continue.

b. Users
   - Select the OU/Group type from the dropdown menu. Do not choose All Users. Typically you will choose Department, or Users, to find a specific user/s.
   - Click on the attributes button ( ) to open the search window.
   - You can search for specific OUs/Groups using the fields at the top or you can look through the hierarchy.
     - Click on the white plus sign ( ) to view the groups below.
     - Click on the blue plus sign ( ) to add that OU/Group to this job.
     - Any number of OUs/Groups can be added to the training removal job.
   - Click on **Done** to add these OUs/Groups

c. Status
   - You will be shown a list of statuses to include in the removal process. Uncheck those which you do not want to remove.
   - Completed training cannot be removed and will not appear on the list.
   - Click **Next** to continue.

d. Reason
   - Select a reason from the drop down menu.
   - Leave a comment in the box. This will appear in the Transcript History in the Training Details Page.
   - Click **Next** to continue.

e. Confirm
   - Review Details
     - This section shows the options you selected for this Training Removal Job.
   - Confirm Training Removal and Submit
     - A list of users that meet your search criteria is listed, along with their current transcript status for this training title.
     - Uncheck any users who do not need the training course removed.
   - Click **Submit** when ready.

2. Remove by CSV upload:

The CSV can include all employees who you know need the training removed. Note that you will need to have the 'Training Object ID' for the training you are removing ready. You can find this in the course catalog.

a. CSV Upload
   - First download the CSV Template provided by Cornerstone.
   - The Template will indicate the required fields. The Training Object ID is required – find this field for the training you wish to remove in the course catalog.
   - Add your employee information to the template, and save as a CSV.
   - Back in Cornerstone, click 'Choose File', and select the file you saved. Then click 'Upload CSV'.
   - Click **Next** to continue

b. Reason
   - Select a reason from the drop down menu.
   - Leave a comment in the box. This will appear in the Transcript History in the Training Details Page.
   - Click **Next** to continue.

c. Confirm
   - Review Details shows the options you selected for this Training Removal Job..
   - Click **Submit** when ready.

C. PROCESSING A TRAINING REMOVAL JOB

1. You will be brought back to the Training Removal Tool main page and see your training removal job in the queued list at the bottom.
2. It will take between 5-15 minutes for the updates to process, depending on the number of records being removed.

If you have any questions, please reach out to pertraining@lacity.org