



Assign training to your team and withdraw team from training



Assigning training to your subordinates is easy in Cornerstone. You can also withdraw them from training.

Assign Classroom (Instructor-Led) Training

Note: There are differences when assigning an Event vs assigning a specific Session.

- When you assign a Session, the employee is approved and registered to attend training on a specific date, time, and location.
- When you assign an Event, the employee must take additional action to request a specific Session, and register for that Session.

Follow these steps to assign classroom training:

1. Locate the classroom training you want to assign using Global Search, Learning Search, Learner Home, or the Event Calendar.
2. Select the Event name. Scroll down to review the list of available Sessions.
3. Select **Assign** from the Actions Options dropdown menu on the right of the View Details button for the specific session you wish to assign. Note: The Assign button at the top of the page is only used when assigning an Event.

The screenshot shows the 'EVENT' page for 'Introduction to COMPAS and the Northpointe Suite'. It includes a 'Details' section with 'For testing only' and a 'Show More' link. Below is the 'Upcoming Sessions' section with a 'Date (Ascending)' dropdown and '2 Sessions' listed. Each session has a 'View Details' button. A callout box points to the 'Assign' button in the dropdown menu, stating: 'This Assign button is ONLY used to assign an Event, and not a specific session.'

4. Note: If you used the Event Calendar to locate a specific session, a pop-up will appear on the right side of your screen. Select **Assign**.

The screenshot shows a 'PARTS / SCHEDULE' pop-up for 'Mon, Dec 21, 2020, 8:00 AM - 4:30 PM CST'. It lists the session 'Introduction to COMPAS and the Northpointe Suite' in 'MADISON'. A callout box points to the 'Assign' button, which is highlighted.



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5. Make your selections on the Assign Training page.

The screenshot shows the 'Assign Training' interface for a session titled 'Introduction to COMPAS'. It includes a 'Due Date' field with a calendar icon, an 'Add Comment' text area, and an 'Automatically register users' checkbox. Below these is a table with columns: 'Direct Subordinates', 'Assignment History', 'Current Status', and 'Include Subordinates'. The table lists several employees, each with a checkbox in the 'Direct Subordinates' column. At the bottom, there are dropdown menus for 'Select an Indirect Subordinate' and 'Select a User from a Cost Center I Appr...', along with 'Cancel' and 'Submit' buttons.

Callouts in the image provide the following instructions:

- Enter a Due Date or leave blank.
- Add a check in the Automatically Registered Users checkbox.
- Select the checkbox at the top of the column to assign to **all** employees.
- Assign to individuals by selecting the checkbox in front of their name.
- Select Submit

! If **Assign** is not available for an upcoming session, session registration is unavailable. Most training sessions close registration two days before the session start date.

6. Add to Waitlist -

When submitting an assignment for a Session, if there are not a sufficient number of seats available, you can choose to add the staff member to the waitlist (if a waitlist is available).

Assign Online Training

1. Locate the online training course you want to assign using Global Search, Learning Search, or Learner Home.
2. Select the training title. The Training Details page appears.
3. Select **Assign**.

The screenshot shows the 'ONLINE CLASS' page for 'Mission How-To: Change 101'. It features a blue 'Launch' button with a dropdown arrow and a grey 'Assign' button. A callout points to the 'Assign' button with the text 'Select Assign'.

4. Make your selections on the Assign Training page.



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Assign Training

Mission How-To: Change
Online Class - Department of

Due Date

Enter Due Date, or leave blank.

Add a check in the Automatically Registered Users checkbox.

Select the checkbox at the top of the column to assign to **all** employees.

Assign to individuals by selecting the checkbox in front of their name.

Select Submit

<input type="checkbox"/>	Direct Subordinates	Assignment History	Current Status	Include Subordinates
<input type="checkbox"/>	Employee Name	0	None	
<input type="checkbox"/>	Employee Name	0	None	
<input type="checkbox"/>	Employee Name	0	None	
<input type="checkbox"/>	Employee Name	0	None	

Select an Indirect Subordinate

Select a User from a Cost Center | Appr...

Indirect Subordinates | Assignment History | Current Status

Cancel Submit

5. Confirm Enrollment -

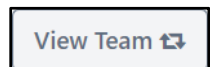
When submitting an assignment, if one or more of the selected staff already have the training on their Transcript, reassigning the training would overwrite the current instance of the training, including any progress the staff member has made. A Confirm Enrollment pop-up appears:

- Select **Save** to submit the assignment and reassign/overwrite the training.
- Select **Cancel** to cancel the assignment and return to the Assign Training page to modify the assignment.

Withdraw

To withdraw a subordinate from training, follow these steps:

1. Navigate to your subordinate's Active Transcript. Go to your own Transcript and select **View Team** on the right.
2. Select the staff member's name from the View Team panel on the left.
3. Scroll down the Active Transcript to find the specific training. Select **Withdraw** from the Actions Options dropdown on the right.



Active By Date Added All Types

Search for training

Introduction to COMPAS and the Northpointe Suite (Starts 2/23/2021)
Due: No Due Date Status: Registered Training Purpose: None

Select Withdraw

View Training D...

- Withdraw
- View Training Details

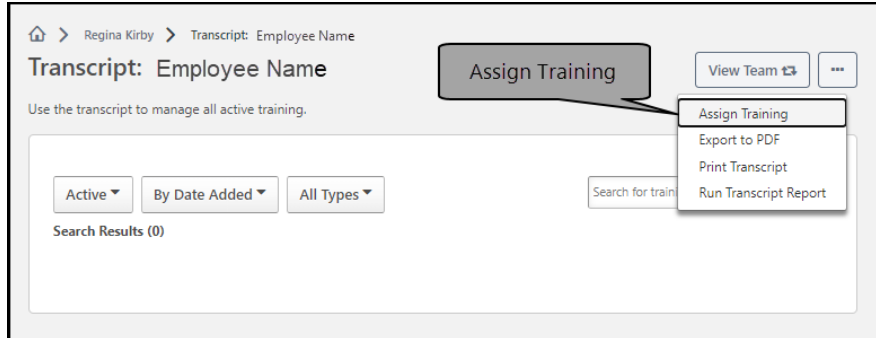
4. Note: You may not have the option to withdraw a subordinate from an online training course. In this situation, you could direct the employee to move the online training course to their Archive transcript.



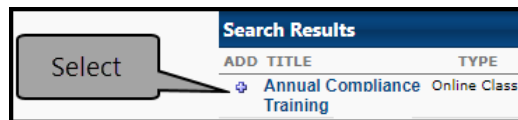
Assign Training

You can also assign training from your subordinate's transcript page.

1. Select the **Ellipses** button on the right. From the dropdown menu, select **Assign Training**.



2. A search pop-up box appears. Enter your search term(s) to find the training you want to assign. From the search results, select the small plus sign **Select** button.



3. Refer to the instructions above to complete the assignment.

If you'd like to confirm your assignment was processed, you can access links to your subordinates' active training transcript using Standard Reports, or from the View Team Button located on your own transcript page.