cornerstone

vILT Connector
Edge Integration Guides

Version history

|	DATE	DESCRIPTION
1.0	4/8/2019	Original version
2.0	9/8/2020	Updates to Cancelling Sessions
3.0	3/4/2021	Updates to Welcome To Updates to Exceptions Updates to Edge Set up > Getting started Updates to Creating Instructors Updates to Creating Events > Creating Sessions Updates to Creating Events > Updating Sessions Updates to Creating Events > Cancelling Sessions Updates to Launch a session > User launches a session Updates to Update session roster
4.0	7/8/2021	Updates to Edge Set up > Getting started Creation of Configuring Provider Options section Updates to Launch a session > Instructor Launches a Session Updates to Launch a session > User launches a session
5.0	8/162021	Update to Creating Events > Creating Sessions to indicate the maximum number of parts per session

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Overview

Cornerstone's Virtual Instructor Led Training (vILT) Connector allows you to build your own integrations with any virtual meeting provider. This connector allows seamless integration with the Cornerstone Learning platform, connecting end users to virtual meeting sessions, capabilities to track attendance, and scheduling tools for instructors. While we encourage all clients to be a part of the vILT Connector Early Adopter, it's important to make sure the features meet your needs. Here are a few characteristics of an Early Adopter:

- **Knowledge of how to integrate with public APIs**
- **Clients who only:**
  - Create/Update Instructor, Create/Update Session, Get Attendance, Launch Session workflows to satisfy their organizational needs.

vILT Connector
Cornerstone
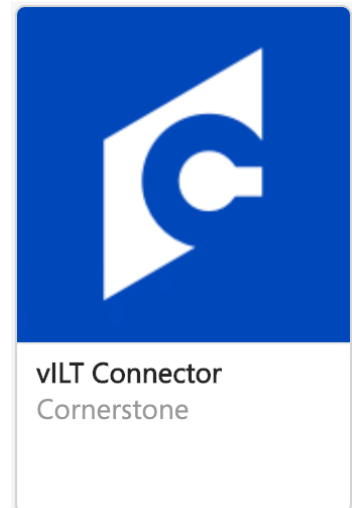
Prerequisites

1. To configure this integration you must have **Edge Marketplace - Manage** and **Edge Integrations - Manage** permissions.

2. To configure ILT Session and Events your user must have standard ILT Permissions.

3. To utilize this feature a client must have **Cornerstone Learning**, **Cornerstone Edge** and a **virtual meeting provider**.
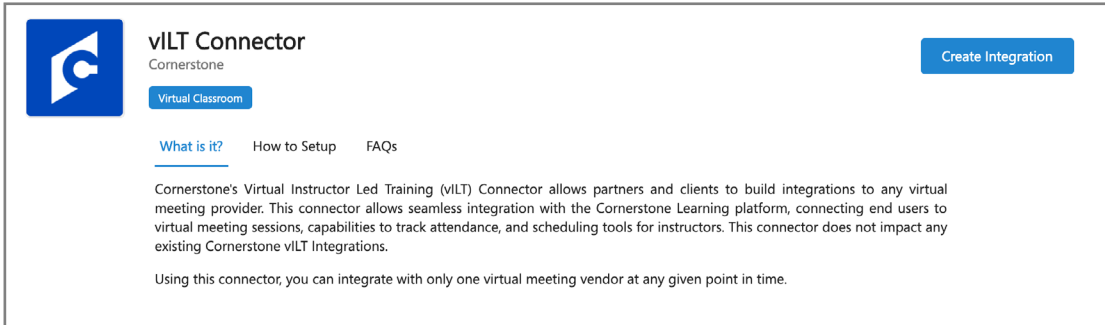
Prerequisite setup

1. Have your virtual meeting provider or 3rd party engineering/software development team review the vILT Connector documentation within the API Explorer.

2. Virtual meeting provider or 3rd party engineering/software development team develops the integration   based on the requirements provided in the Cornerstone documentation.
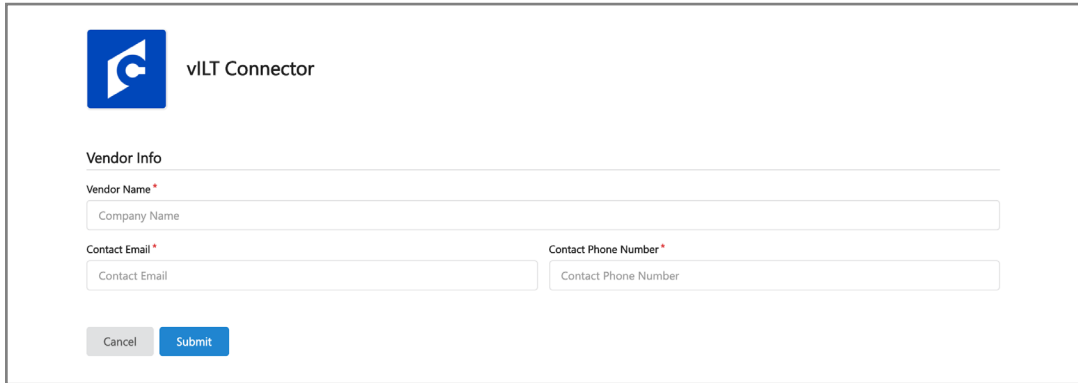
Edge setup

Using the following steps, this integration can be self-installed in your CSX Stage or Pilot to support your testing exercise. When ready to move to Production, please reach out to your Cornerstone Client Executive to have the integration installed in

1. Log in to your Cornerstone portal.

2. Navigate to the **Edge Marketplace** (Admin > Tools > Edge > Marketplace).

3. Search for **vILT Connector** then click on the **vILT Connector** tile.

4. Click on **Create Integration**.

5. Enter your virtual meeting provider information, then click **Submit**.

6. Click on **Configure Now**. You will then be directed to the **Settings** page. You can also navigate to this page by going to Admin > Tools > Edge > Integrations > search for vILT Connector > click on vILT Connector.

7. Configure the integration on the **Settings** page.

- **Integration Name** - This is a name used to identify the integration implemented on your side. The value to be entered in this field is provided by your vILT Vendor.

- **Username** - This is the username provided by your vendor/development partner in order to authenticate the request from Cornerstone LMS to the virtual meeting vendor.

- **Password** - This is the password for the username provided by your vendor/ development partner in order to authenticate the request from Cornerstone LMS to the virtual meeting vendor.

- **Base URL -** This is the base URL endpoint for all the virtual meeting vendor webhooks. This is provided by your vILT Vendor

- **Integration ID** – This is a unique value per integration (valid GUID). It is auto-generated when adding a new integration.

8. Click the **Save Settings** button.

Cornerstone supports multiple accounts through vILT Connector.

There are 2 different aspects of multiple accounts support:

a. Ability to associate multiple accounts to one single vILT integration built on top of CSoD vILT Connector (eg. I want to associate vILT account 1 for US region to the vILT vendor AND vILT account 2 for EMEA region to the same vILT vendor)

Note: while Cornerstone has built the ability to associate multiple accounts to a vILT integration through the Cornerstone vILT Connector, it may require additional work on the vILT vendor side, or integrator/partner having built a vILT integration with the vILT vendor to be able to consume that service.

When several accounts tied to same vILT integration are created, it will result in the creation of multiple vILT providers in Cornerstone.

b. Ability to use multiple vILT integrations built on top of CSoD vILT Connector with multiple vILT vendors (eg. if an organization want to use one vILT integration with vILT vendor 1, and another one with vILT vendor 2)

9. Search for **vILT Connector** integration and enable the integration by turning on the toggle switch.

Configuring provider options

After configuring the vILT integration, the associated provider is automatically created in the LMS portal

The vILT Connector technically supports

1. Automatic cancellation of sessions (when a session is cancelled in LMS portal, it can be cancelled automatically on the vILT Vendor side)

2. Extended options (ability to set up extended options when creating or editing a virtual session in LMS portal).

To benefit from those, there are 2 conditions:

1. vILT Vendor or partner has done work on their side to be able to consume those services

2. Those options are enabled in LMS portal at the provider level. The options are turned OFF by default.

To enable those options:

1. Navigate to ILT > Vendors & Instructors. Alternatively, navigate to Admin > Tools > Learning > Catalog Management > Providers

2. Search for the vILT vendor (correspondin to the 'Integration name' configured when installing vILT integration)

3. Click on the Edit icon for the vendor

4. Configure the 2 options

Note: For these options to effectively work, the vILT vendor or partner must have done work to consume those services available via the vILT Connector. We recommend to get confirmation from the vILT vendor or partner before activating these options.

Creating instructors

ILT Administrators can add Instructors to vILT custom provider using the Vendors & Instructors configuration page. User First Name, Last Name and email address are required. Upon clicking submit, the instructor information will be sent to the virtual meeting provider.

1. Navigate to ILT > Vendors & Instructors.
2. Search for the 'CustomVilt' vendor and click the Instructor's link for the vendor (Cornerstone creates the 'CustomVilt' vendor when you install and enable the connector in Edge).
3. On the Instructors page, click Add New Instructor.
4. Search for and add an existing internal user as an instructor (external instructor is **NOT** supported by the vILT Connector). User first name, last name, home location and email address are required.
5. Check the 'Active' checkbox.
6. Hit Submit.

Updating Instructors

ILT Administrators can edit existing Instructors added to vILT custom provider using the Vendors & Instructors configuration page.

1. Navigate to ILT > Vendors & Instructors.

2. Search for the 'CustomVilt' vendor and click the Instructor's link for the vendor.

3. On the Instructors page, search for your instructor. Once you locate your instructor, click the 'Edit' icon.

4. Make the required changes on the Edit Instructor page and hit Submit.

Creating events

Event and Session creation is identical to existing ILT workflows. Events created for vILT sessions must be associated with the vILT custom provider. Session information is sent to the virtual meeting provider when "Save" is pressed from the create session Summary page.

1. Navigate to ILT > Manage Events & Sessions. Alternatively, navigate to Admin > Tools > Learning Catalog Management > Events & Sessions.

2. Click Create New Event.

3. Complete the desired Event properties. While selecting a primary or secondary vendor, be sure to choose your virtual meeting vendor. Click Next.

4. On the Availability tab define which users can find and register for the Event. Click Next.

5. If desired you can define pricing and training units, otherwise you can proceed to the Session Defaults tab.

6. On the Session Defaults Tab you are required to define Minimum and Maximum Registration. You can complete other fields on this tab as desired.

7. Hit the Save button.

Creating Sessions

1. Navigate to ILT > Manage Events & Sessions. Alternatively, navigate to Admin > Tools > Learning Catalog Management > Events & Sessions.

2. Search for the Event you created in Step 2 above.

3. Click on the Calendar icon for the Event.

4. Click on Create New Session. Note that this link may instead read as 'Create New {primary vendor name} Session' or 'Create New {secondary vendor name} session'.

5. On the Schedule Wizard tab, choose your Session's frequency and click Next.

6. On the Part Schedule tab, enter the desired details. While adding the instructor, be sure to select the instructor you added/edited in Step 1 above.

7. Click Save Part.
   Note that a session created with a vILT vendor can contain a maximum of 20 parts.

8. You can update additional details as desired on the Details, Availability, Emails, and Pricing tabs.

   Cornerstone vILT Connector now supports extended options available from third party vILT vendor. Each vILT vendor have their own extended options that can be configured for virtual meetings (eg. choose whether to start a meeting with everyone muted by default, whether meetings are set to auto-record, etc.)

   The following types of controls are supported: Radio button; Checkbox; Text box and Label.

   In order to be able to leverage extended options when creating a session in Cornerstone, the following steps needs to be done:
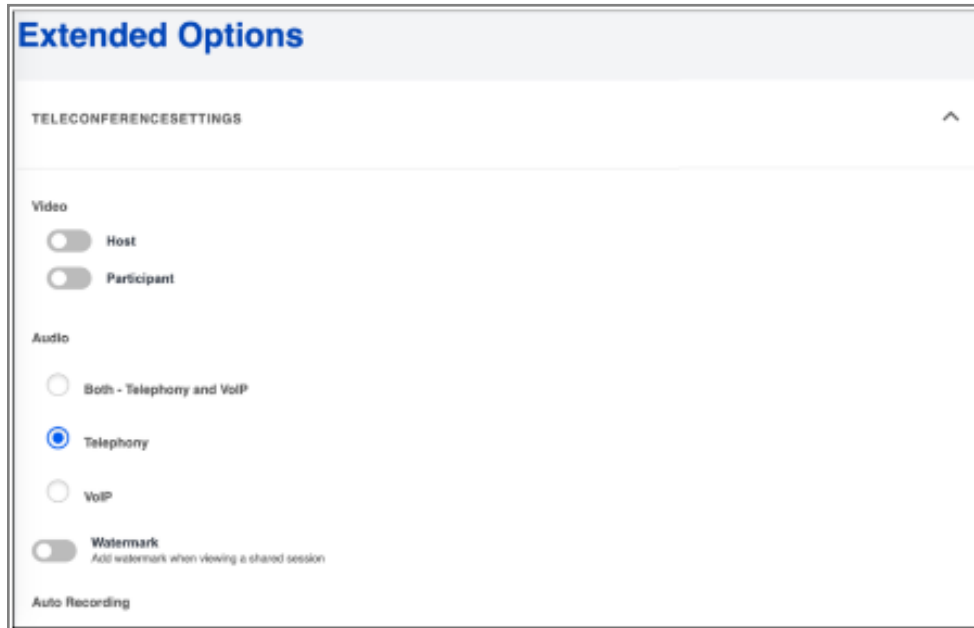
   Step #1 - The vILT vendor must configure the extended options for their customers (this is a work to be done by the vILT vendor)

   Step #2 - Once step #1 is done, the customer needs to raise a case to Cornerstone to activate Extended options for the vILT Connector (there is a back end setting to be turned on by Cornerstone).

   When it is turned on, at the session level in Cornerstone, admin would see the option to define the extended options: (only for sessions tied to vILT providers relying on Cornerstone vILT connector):
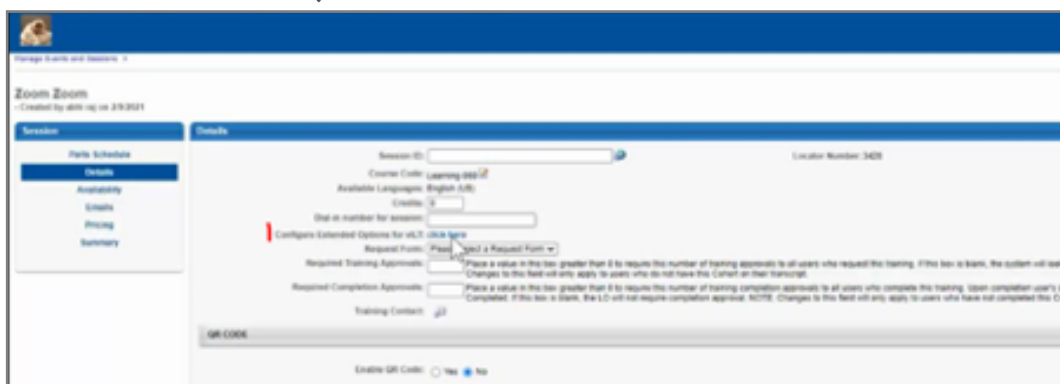
When clicking the link, admin would be directed to a page where he/she could define extended options – example below:

9. Once you navigate to the Summary tab, hit the Save button to create your Session.

NOTE: To add more than one session part click the add part button in the parts schedule page of a session. Once you have added multiple parts each will correspond to a different meeting in your preferred vendor. This change will only take effect for sessions created after Oct 30, 2020. Sessions previously created will continue to have only one part. Note that you can create up to 20 parts per session.

Updating Sessions

1. Navigate to ILT > Manage Events & Sessions. Alternatively, navigate to Admin > Tools > Learning Catalog Management > Events & Sessions.
2. Search for the Event you created in Step 2 above.
3. Click on the Calendar icon for the Event.
4. Search for the Session you created in Step 3 above.
5. Click the Edit icon for the Session.
6. Update any details as desired and hit the Save button

Note: The updates done at session level in Cornerstone (eg. updating the session start date, or hour) propagate to the meeting configuration on the vILT vendor side, including the updates done on extended options.

Canceling Sessions

1. Navigate to ILT > Manage Events & Sessions. Alternatively, navigate to Admin > Tools > Learning > Catalog Management > Events & Sessions
2. Search for the event you have created
3. Click on the calendar icon for the event
4. Find the session you would like to cancel
5. Click on the red 'X' icon on the far right side of the screen
6. Complete the form asking for details the session cancellation. One piece of information requested is the reason for the cancellation.
7. Click submit
8. The corresponding session will be canceled from your vendor's instance

Note: while Cornerstone has built in the Cornerstone vILT Connector the ability to reflect the cancellation of a session on the vILT vendor side, it may require additional work on the vILT vendor side, or integrator/partner having built a vILT integration with the vILT vendor to be able to consume that service.

Note: Automatic cancellation of the meeting on the vILT vendor side upon cancellation of the session in Cornerstone currently requires the activation of a back-end setting on Cornerstone side.

The customer needs to raise a case to Cornerstone to request the back-end setting to be turned on.

If the back-end setting is turned off, when a vILT session is cancelled in Cornerstone, the associated meeting is not cancelled on the vILT vendor side.

Launch a session

Once a session has successfully requested or been assigned end users can launch a session from their Cornerstone Transcript, when the designated launch timeframe has opened. Depending on your virtual provider, instructors may have a different launch URL to initialize the session.

Instructor Launches a Session

Instructors have 2 possible ways to launch a session. Instructors have to be created as users in Cornerstone.

Launching session through Cornerstone

1. Navigate to ILT > View Your Sessions.
2. Search for your Session and click on the time link for your Session. This will launch the virtual meeting session.

Launching session through email

If an administrator has configured emails via Email Administration leveraging the INSTRUCTOR.LAUNCH.SESSION.LINK tag, they receive an email with a customized link which allows them to launch the virtual session by clicking the link.

The INSTRUCTOR.LAUNCH.SESSION.LINK tag is supported in the following email actions

1. ILT Session Register
2. Session Changed
3. Session Start Date
4. ILT Session Becomes Available

To access Email Administration, go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT. To configure a template for the email, search for one of the email actions listed above and click the Add Email option next to it.

To include a link that instructors can click to launch their virtual session in the ILT Session Register email, the administrator can add the INSTRUCTOR.LAUNCH.SESSION.LINK tag to the body of the email. A functional link will replace the tag when instructors view the email. This email tag functions for both single and multi-part sessions.

Instructor Launches a Session

Learners have 2 possible ways to launch a session:

Launching session through their transcript:

1. 1. Navigate to the user's transcript page

2. 2.   Search for the session and click on Training Details

3. 3.   Click Launch. This will launch the virtual meeting session.

Launching session through email

If an administrator has configured emails via Email Administration leveraging the LAUNCH.SESSION.LINK tag, when learners register for training, they receive an email with details about the time and date of the training, along with a customized link which allows them to launch the virtual session by clicking the link.

The LAUNCH.SESSION.LINK tag is supported in the following email actions

1. ILT Session Register
2. Session Changed
3. Session Start Date

To access Email Administration, go to ADMIN > TOOLS > CORE FUNCTIONS > EMAIL MANAGEMENT. To configure a template for the email, search for one of the email actions listed above and click the Add Email option next to it.

To include a link that users can click to launch their virtual session in the ILT Session Register email, the administrator can add the LAUNCH.SESSION.LINK tag to the body of the email. A functional link will replace the tag when users view the email. This email tag functions for both single and multi-part sessions.

Update session roster

Once the Session's end date and time have passed, an instructor or an admin should wait 24 hours, and then should manually trigger a session roster update by clicking the 'Update Attendance' button on the Session Roster page.

This action causes Cornerstone to send a request to the virtual meeting provider's system to get the list of attendees.

Attendance data from the vILT provider will appear on the roster page.

The instructor or admin could make the appropriate changes needed and then, either:

-Click on "Update Attendance" to save the changes (without submitting roster)

-Click on "Submit Roster" to submit attendance, scoring and pass status for users who have completed enough parts required for Session Completion

Note: once roster has been submitted, using "Update Attendance" will no longer get attendance from the vILT provider..

1. Navigate to ILT > Manage Events & Sessions.

2. Search for your Session.

3. Click the Roster icon under Session Options for your Session.

4. Navigate to the Attendance and Scoring tab. If you do not see any attendees on this tab, it's likely that Cornerstone wasn't able to retrieve a attendee list from the virtual meeting provider's system. The amount of time it takes for the attendees to reflect in the Session Roster within Cornerstone will depend on the virtual meeting provider. If 24 hours have passed since the session end date and time, you can force Cornerstone to fetch the attendee list by clicking the Update Roster button.

5. Once the roster has been updated, click the Submit Roster button to submit the roster and complete the Session.

Appendix

A. Questions

For answers to any questions you may have regarding vILT Connector check out Edge Answers by navigating to Admin > Tools > Edge > Answers.

B. Security Permissions

PERMISSION NAME	PERMISSION DESCRIPTION
ILT Schedule Part Occurrence	Allows the admin to create more than one ILT session schedule part at the same time using a part occurrence schedule wizard. This is an administrator permission.
Sessions - Cancel	Grants ability to cancel instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission.
Sessions - Create	Grants ability to create new instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only create sessions for events for which they have the availability to view. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. Note: The "Restrict to User as Instructor" constraint is available, but it does not actually constrain the permission. Be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.

PERMISSION NAME	PERMISSION DESCRIPTION
Sessions - Edit	Grants ability to edit/update existing instructor led training sessions. This permission works in conjunction with Events - View and Sessions - View permissions. Administrators can only edit sessions for which they have the availability to view and edit. When adding users to a session in which the session roster is full, this permission grants the ability to increase the session's available seats. This permission can be constrained by OU, User's OU, Instructor, User as Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, and User Self and Subordinates. This is an administrator permission.
Sessions - View	Grants view-only access to instructor led training sessions, enabling the user to view all details/options that were selected when the session was created. This permission works in conjunction with the Events - View permission. This permission can be constrained by OU, User's OU, Instructor, Facility, Facilities Owned by User, ILT Provider, User's ILT Provider, User, User as Instructor, and User Self and Subordinates. This is an administrator permission.
ILT Vendors - Create	Grants ability to create new training Vendors (Providers). This permission works in conjunction with the Vendors - View permission. This is an administrator permission.
ILT Vendors - Update	Grants ability to edit/update existing training Vendors (Providers). This permission works in conjunction with the Vendors - View permission. This is an administrator permission.
ILT Vendors - View	Grants view only access to instructor led training vendors (providers), via the ILT Vendors and Instructors screen. This is an administrator permission.
Instructor Requests - Manage	Grants ability to approve or deny instructor requests for ILT sessions. This permission works in conjunction with the Vendors - View, and Instructor Requests - View permissions. This is an administrator permission.

PERMISSION NAME	PERMISSION DESCRIPTION
Instructor Requests - View	Grants view-only access to instructor led training session Instructor Requests, via the ILT Vendors and Instructors screen. This permission works in conjunction with the Vendors - View permission. This is an administrator permission.
ILT Evaluations - Print	Grants ability to print evaluations at the session level for any session within the permission constraints. This permission can be constrained by Instructor, ILT Provider, User's ILT Provider, and User as Instructor. This is an administrator permission.
Sessions - Create Child Sessions	Grants ability to create new instructor led training child sessions available when the backend setting to allow multiple providers for a session is enabled. When the multiple providers backend setting is enabled, administrators need this permission to create child sessions even if they have the Sessions - Create permission. This permission works in conjunction with Events - View and Sessions - View permissions. This is an administrator permission. Note: This permission is visible in the system even if the backend setting to allow multiple providers for a session is disabled. However, the functionality to create child sessions is only granted when the backend setting is enabled.
LO Attachments - Manage	Grants ability to upload attachments to learning objects. Administrators with this permission are automatically granted the LO Attachments - View permission. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.
LO Attachments - View	Grants ability to view the learning object attachments that are set to be available to administrators. This permission can be constrained by User's ILT Provider, Provider, and ILT Provider. This is an administrator permission.

PERMISSION NAME	PERMISSION DESCRIPTION
Roster - Manage	Grants ability to manage instructor led training session rosters, including updating attendance, and marking the ILT session complete to update student transcripts. A variety of other features are available depending upon additional roster permissions. This permission works in conjunction with Events - View, Sessions - View, and Roster - View permissions. This permission can be constrained by Instructor, User as Instructor, ILT Provider, and User's ILT Provider. This is an administrator permission.
Roster - View	Grants view-only access to instructor led training session rosters. This permission works in conjunction with Events - View and Sessions - View permissions. This permission can be constrained by Instructor, ILT Provider, User's ILT Provider, and User as Instructor. This is an administrator permission.
Events - Create	Grants ability to create new instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.
Events - Edit	Grants ability to edit/update existing instructor led training events. This permission works in conjunction with Events - View permission. This permission can be constrained by OU, User's OU, ILT Provider, and User's ILT Provider. This is an administrator permission.
Events - View	Grants view-only access to instructor led training events, enabling the user to view all details/options that were selected when the event was created. This permission can be constrained by OU, User's OU, User's ILT Provider, and ILT Provider. This is an administrator permission.
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.