



Microsoft Teams Learning in the Flow

Edge Integration Guides

This Learning in the Flow integration, available through the Edge Marketplace, enables end users to interact with learning content directly from within MS Teams.

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The Microsoft Teams Learning in the Flow Integration

Learning in the flow of work has never been easier with Cornerstone OnDemand's Microsoft Teams integration.

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Long gone are the days of needing to navigate your Learning Management System for premium learning content. Access your training catalog through Microsoft (MS) Teams using intelligent search mechanisms including the Cornerstone chatbot. Stay on top of assigned training, recommend and share training, and increase your time to completion with proactive notifications about due training.

Integration Features

- **Access to your training catalog** Search, find, insert, and launch training within your chat. Extension available in the Compose Message area.
- **Interactive bot** Ask the Cornerstone bot to return training based on your search query, is due soon or overdue.
- **In-app Notifications** Be notified of upcoming and overdue training on your transcript.
- **Training preview** See details about a shared training including image, title, description,



High-performing organizations steward experiences by making content relevant, personalized, and available to learners when they need it.

Deloitte

[Learning in the Flow of Work Solutions: Market Primer](#)

Getting Started

Integration between Microsoft Teams and Cornerstone will require a Microsoft Office 365 license with Microsoft Teams, as well as enablement in both AppSource (Microsoft) and Edge Marketplace (Cornerstone).

Step 1. Security Permissions

Security Permissions grant access to certain functionality in the system, while also allowing administrators to restrict access to certain data.

Security Roles, their permissions and users assigned are controlled in **Security Role Administration** (*Admin > Tools > Core Functions > Security Role Administration.*) [Find more information about Security Role Administration in Online Help.](#)

Edge Permissions

To enable and configure the MS Teams integration within Cornerstone's Edge **Marketplace** and **Integrations** pages, the following permissions will be required for the administrator security role:

- **Edge Marketplace - Manage**
Allows administrator access to Edge Marketplace.
- **Edge Integrations - Manage**
Allows administrator access to Edge Integrations.

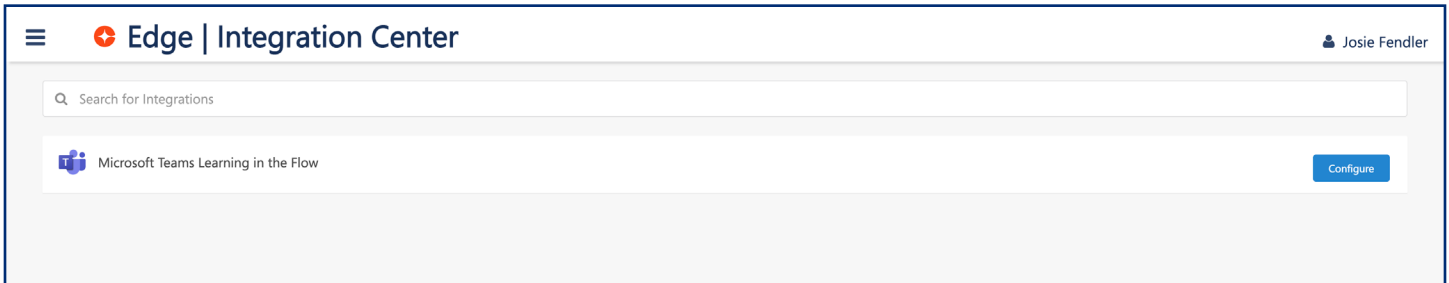
Step 2. Contact your Client Executive

This enablement is only available in Cornerstone production environments; not available in pilot and stage environments.

Please reach out to your Cornerstone Client Executive to have the integration installed in your CSX Production portal.

Once enabled, The Microsoft Teams Learning in the Flow Integration is available for configuration in Edge Integrations.

Navigate to Admin > Tools > Edge > Integrations.



Select the Configure button.

Step 3. Edge Integration Setup

Within the Edge Integration you will need to enter the following information:

- **Tenant ID:** Enter the [Tenant ID](#) for your Office 365 environment
- **Client ID:** No action required, will populate on its own
- **Client Secret:** No action required, will populate on its own
- **Portal name:** No action required, will populate on its own
- **Base URL:** No action required, will populate on its own
- **Enable Proactive Messaging:** Enable this if your learners should receive push notifications from the CSOD Learn bot within MS Teams.
- **SSO Endpoint URL:** This URL can be found at Admin > Tools > Learning > Catalog > Deep Links > Base URL. Only one SSO Endpoint URL is supported, so if your portal is

Please fill in the fields below to configure your integration.

▶ Setup Instructions

Tenant ID *

Client ID

Client Secret

Portal name

Base URL

☐ Enable Proactive Messaging

SSO Endpoint URL

SSO Return URL Parameter name

Primary profile Attribute used for Profile lookup

☐ Use App From Microsoft AppSource

configured with more than one, choose the SSO Endpoint URL that is used by the majority of your MS Teams users. If your portal does not have SSO configured, leave blank.

- **SSO Return URL Parameter name:** This value is either RelayState or returnUrl and can be found within the SSO Endpoint URL. This value is case sensitive, so follow convention above.

For example, if your organization's SSO URL is "https://myportal.csod.com/samldefault.aspx?returnUrl=", this parameter would be "returnUrl", as can be seen at the very end of the SSO URL. If the SSO URL was "https://myportal.csod.com/samldefault.aspx?RelayState=", the parameter would be "RelayState". If your portal does not have SSO configured, leave blank."

- **Primary profile Attribute used for Profile lookup:** Choose if you would prefer user email addresses or usernames for profile look up
- **Use App from Microsoft AppSource:** Cornerstone Learn app in Microsoft AppSource is designed to handle requests for customers inside/outside the UK region. You must enable this if you are a non-UK customer and your admin/users will be using Microsoft AppSource to search & install the Cornerstone Learn app. Please contact your Customer Support to enable regional apps which allows low latency and limit the flow of data within the customer preferred region.

Step 4. AppSource Setup

There are multiple ways that your organization can enable the CSOD Learn app in your teams environment. Microsoft provides instructions for all configuration considerations and options. This information can be found here:

<https://docs.microsoft.com/en-us/microsoftteams/manage-apps>

The screenshot shows the Microsoft Teams admin center interface. The top navigation bar includes 'Microsoft', 'Docs', 'Documentation', 'Learn', 'Q&A', and 'Code Samples'. A search bar and 'Sign in' link are on the right. The main header shows 'Microsoft 365' with various solution categories. The breadcrumb trail indicates the path: 'Microsoft Teams > Apps, bots, and connectors > Manage apps for Teams > Overview'. The left sidebar contains a 'Filter by title' search and a list of navigation items under 'Apps, bots, and connectors', including 'Overview', 'Apps from Microsoft', 'Third-party apps', 'App templates for Teams', 'How to build and customize your own apps', and 'Manage apps for Teams'. The main content area is titled 'Manage your apps in the Microsoft Teams admin center' and includes a date, read time, and 'Applies to: Microsoft Teams'. The text explains that this page is used to view and manage all Teams apps, including approving, uploading, blocking, or allowing apps at the org level, adding apps to teams, and managing permissions. It also mentions using app permission policies, app setup policies, and custom app policies. A 'Note' box states that the Manage apps page is not available in Microsoft 365 Government Community Cloud (GCC) deployments. The right sidebar has a 'Is this page helpful?' feedback section and a list of related articles under 'In this article', such as 'View apps', 'Publish a custom app to your organization's app store', 'Allow and block apps', 'Add an app to a team', 'Purchase services for third-party apps', 'Grant admin consent to apps', 'View resource-specific consent permissions', 'Manage org-wide app settings', and 'Related topics'.

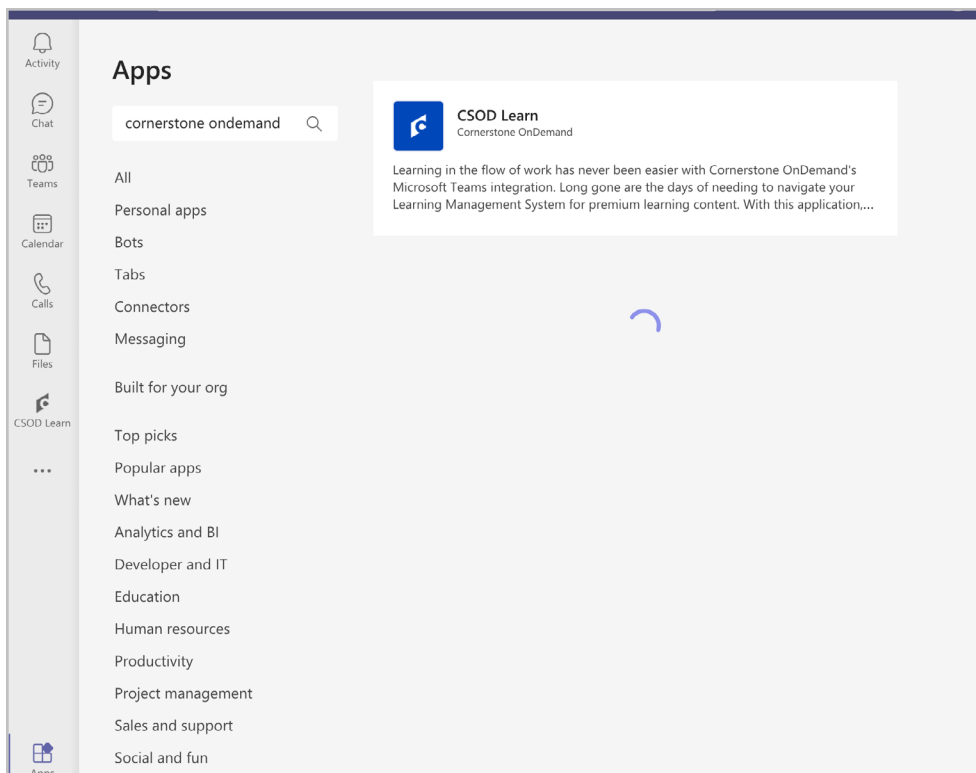
Install the CSOD Learn App in Microsoft Teams

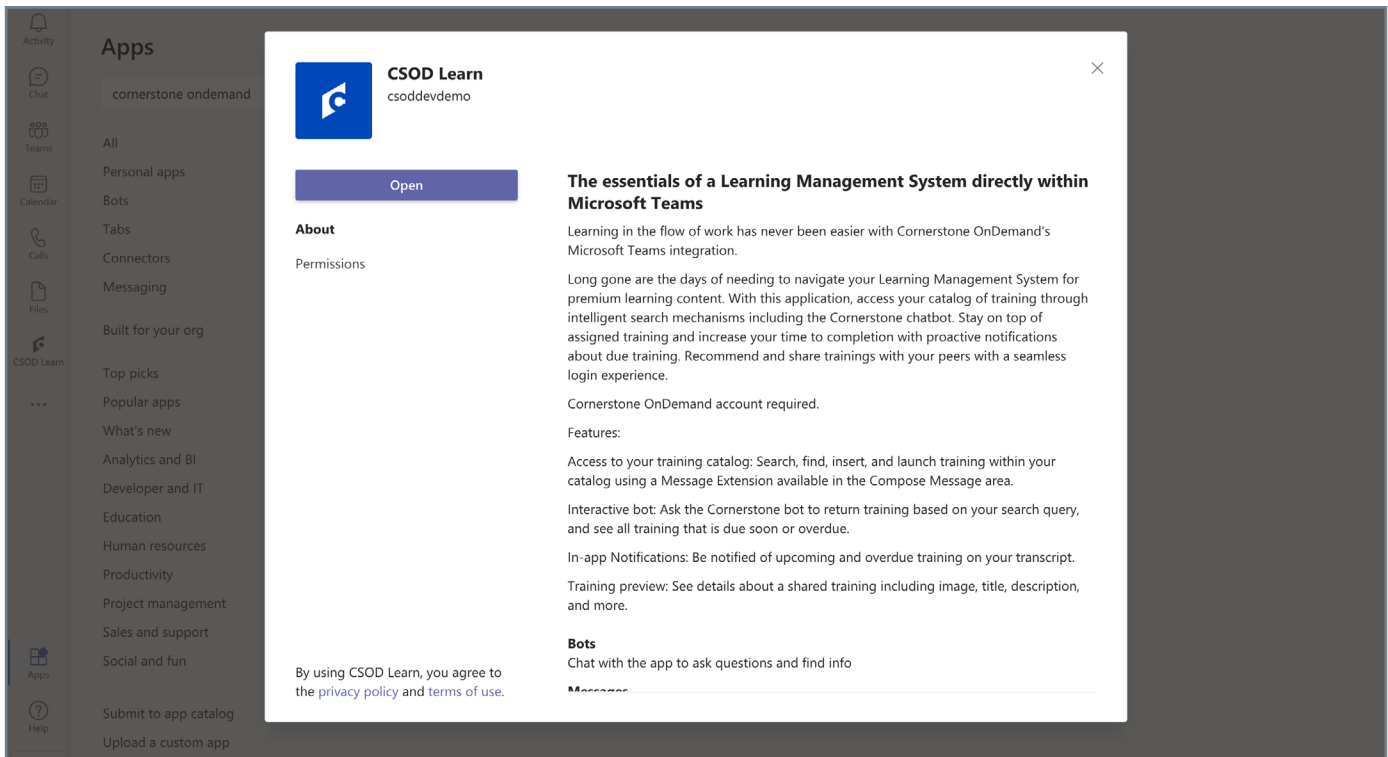
End User Installation

After the integration has been configured in both Cornerstone Edge and the Microsoft AppSource, your users will be able to install the CSOD Learn app to their personal MS Teams account. To do so, navigate to the **Apps** option in their **SideBar** menu.

Using the search bar on the Apps page, users can enter search terms such as “Learn” or “Cornerstone OnDemand” to find the CSOD Learn app.

Users may **select** the app tile to continue installation or from the Options menu that appears. Select the **Copy Link** option to share the app with others.





When users select the app tile, they are able to review information about the app and the permissions it will receive:

- Receive messages and data that the user provides to it.
- Send the user messages and notifications.
- Access the user's profile information such as name, email address, company name, and preferred language.

Selecting the **Add** button will finalize the installation process. The app will connect to the user's Cornerstone record using the configurations determined during the Edge Integration Setup.

Install for Multiple Users

After a successful installation, you will see the app populate in the table. The app is now available in your environment, but not yet installed for your end users.

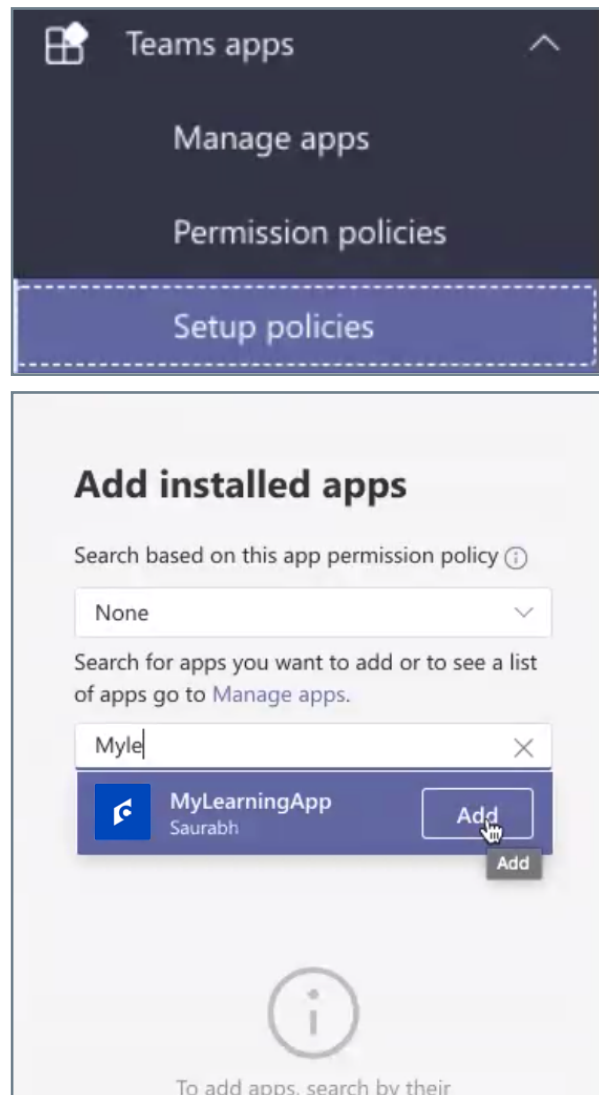
To enable the app for all your users:

1. Navigate to **Setup policies**. By default, the app will be available Globally across your MS Teams environment.
2. Navigate to Teams apps > Setup Policies > Select “Global” > Select “Add apps” > Search for installed app > Add
3. The next step is to **pin** the app to the user’s left-hand side bar. Navigate down to **Pinned apps**, and enable the app. In this area you are also able to further define the sequence in which the app displays in their left-hand side bar.
4. After saving these actions, you may experience an error. This error should self-resolve within 2 days and will result in a delay for your app to appear to your end users. This is per Microsoft’s standard installation policy.

The installation may require some time for Microsoft to apply your new setup policy, resulting in a delay in seeing the app. You may also try logging out then logging back in.

For additional support, see Microsoft’s recommended steps to install apps:

<https://docs.microsoft.com/en-us/microsoftteams/upload-custom-apps>



Installing Multiple Microsoft Tenants

If your organization utilizes more than one Microsoft Tenant, you are able to configure the MS Teams Learning in the Flow integration to support this. There are steps that must be taken both within Edge Marketplace and also within MS Teams Management.

Edge Marketplace

1. Within CSOD, navigate to *Admin > Tools > Edge > Marketplace > Microsoft Teams*, search for Microsoft Teams Learning in the Flow and select the integration from the list. If you have already enabled the tile, navigate to *Admin > Tools > Edge > Integrations > Microsoft Teams Learning in the Flow* and select the integration from the list.
2. The first field available for edit on the tile is **tenant ID**. Here add any additional tenant IDs separated by commas.
3. Click **Save Settings**.

Microsoft AppSource

The application must be installed for each of the tenants that you have entered into the Edge Tile in step 2 above. Log into your MS Teams environment with your administrative credentials, and follow this link: <https://admin.teams.microsoft.com/policies/channels>

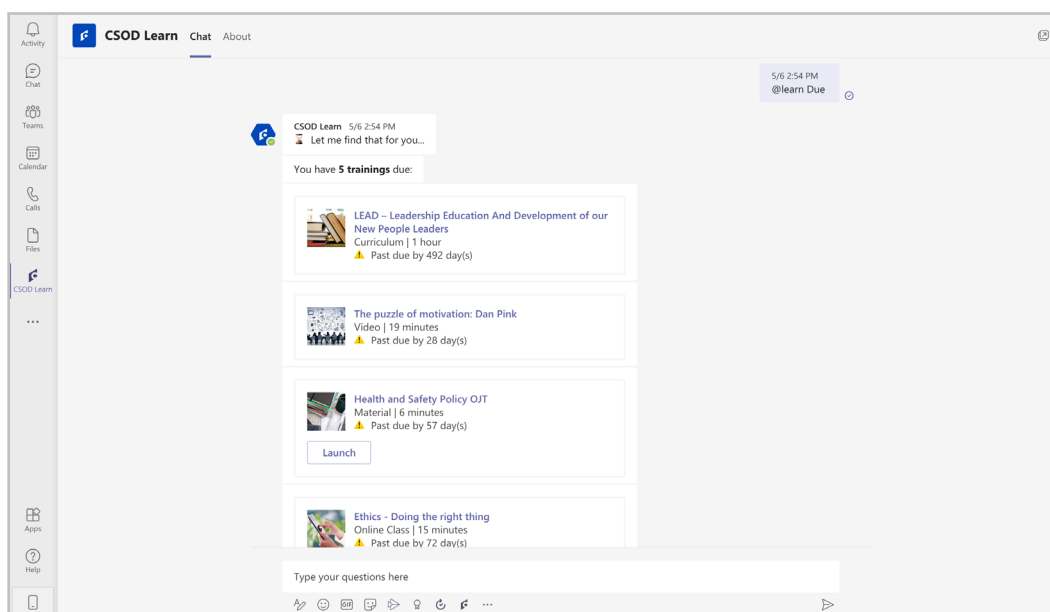
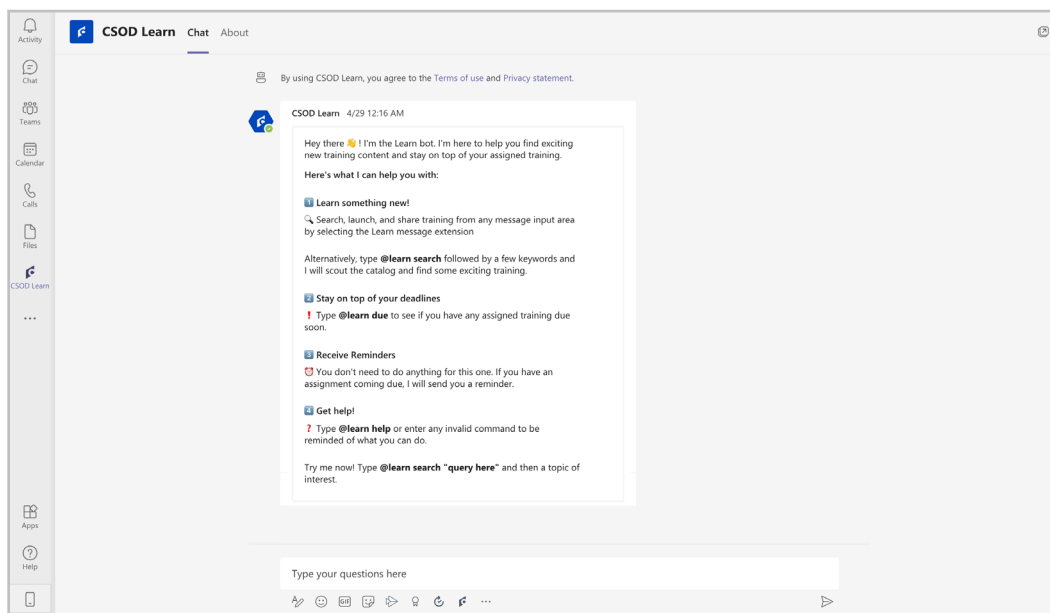
1. Navigate to “Manage apps” > Org-wide app settings > Enable “Allow interaction with custom apps”
2. Navigate to “Manage apps” > Select the “+ Upload” action > Select the .zip download (See the [Appendix](#) for instructions on how to find the .zip file)
3. After a successful installation, you will see the app populate in the table. The app is now available in your environment, but not yet available to your end users.
4. The next step is to enable the app for all your users. Navigate to “Setup policies”
5. By default, the app will be installed Globally across your MS Teams environment. To make this new app available to all your users, navigate to Teams apps > Setup Policies > Select “Global” > Select “Add apps” > Search for installed app > Add
6. Optional: The next step is to pin the app to the user’s left-hand side bar. Navigate down to Pinned apps, and enable the app. In this area you are also able to further define the sequence in which the app displays in their left-hand side bar.
7. After saving these actions, you may experience an error. This error should self-resolve within 2 days and will result in a delay for your app to appear to your end users. This is per Microsoft’s standard installation policy.

The installation may require some time for Microsoft to apply your new setup policy, resulting in a delay in seeing the app. You may also try logging out then logging back in. The installation may require some time for Microsoft to apply your new setup policy, resulting in a delay in seeing the app. You may also try logging out then logging back in.

For additional support, see Microsoft’s recommended steps to install apps: <https://docs.microsoft.com/en-us/microsoftteams/upload-custom-apps>

Using the CSOD Learn Bot

After installation, the CSOD Learn bot is accessible from the user's **Chat** or as a separate tool in the **SideBar** on the left-side of the screen.



Upon installation, users will receive a welcome message from the CSOD Learn bot explaining its functionality.

1. **Due Date Reminders** - If a learner has a training with a due date within 7 days in the past or the future, they will receive daily reminders to complete the training
2. **@Learn Search** - By sending CSOD Learn bot a message of "@Learn Search" followed by a few keywords, CSOD Learn bot will search the cornerstone catalog and return top 5 results from Global Search. These results will respect availability of the user
3. **@Learn Due** - By sending CSOD Learn bot a message of "@learn due", CSOD Learn bot will return any trainings on the user's transcript with a due date.
4. **@Learn help** - By sending CSOD Learn Bot @Learn help or any invalid command, users will be reminded of all the commands and actions available to them

Clicking on the training title or **View Detail** button will direct learners to Learning Details within CSOD in a browser window.

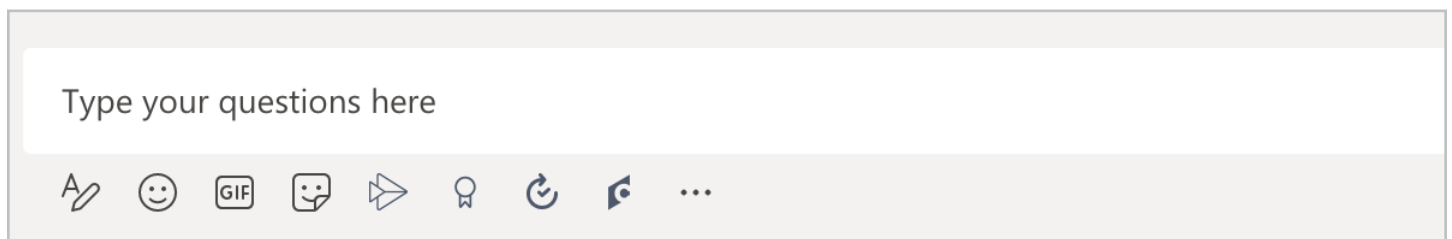
Clicking on the **Launch** button (available for training on the user's transcript where Launch is applicable) will open the content directly into a new window. This action will be available only if the training is already on the user transcript and Launch is an available action for the LO type and training.

The Learning Details page and Content will open only when the user is authenticated either through SSO or already logged into Cornerstone. If not, the user will be directed to the Cornerstone log in page and prompted to enter credentials before being directed to the link address.

Messaging Other Users

CSOD Learn bot is also available for use when messaging other users in Chat, allowing users to share training relevant to their current conversation without leaving the chat.

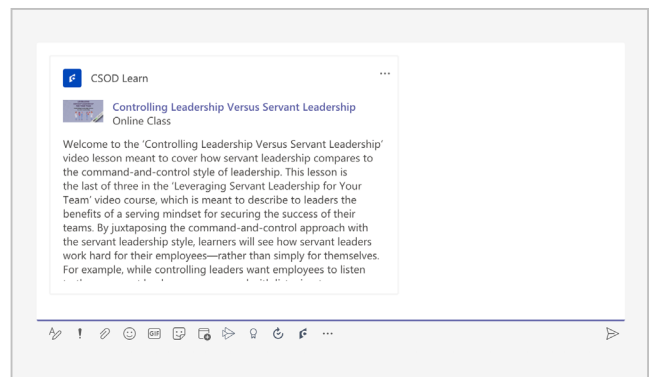
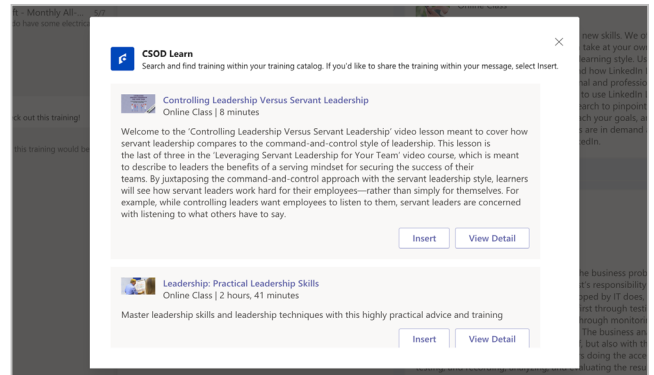
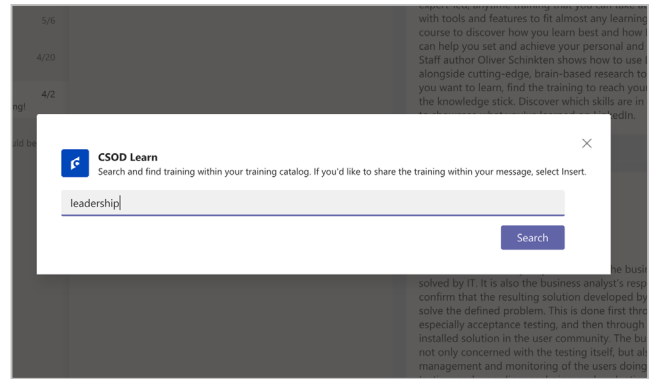
With CSOD Learn app installed, a Learn icon will appear in the Chat tool bar. Clicking this icon will open a search window.



Users can enter a search query and the top 5 search results will be returned.

Users can select to **Insert** the training tile into the open message thread or select the **View Detail** button to be directed to Learning Details of the training.

Selecting the Insert button adds the training tile to the message box, where learners can hit **send** to share within their chat thread.



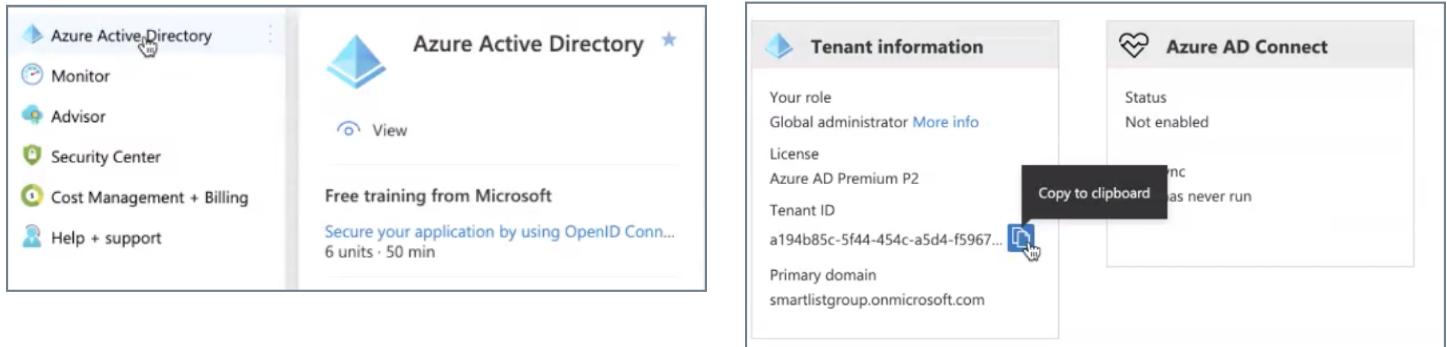
Appendix

Appendix A: Finding your Tenant ID

To find the Tenant ID necessary for the Edge Integration Setup, launch the following link using your administrative credentials for Office 365 / MSTEams:

https://portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/Overview

Navigate to Azure Active Directory > Tenant Information card > copy Tenant ID



Appendix B: Accessing .zip for Special Configurations

In order to upload the correct .zip application when configuring multiple MS tenant IDs or to choose a specific region:

1. Visit <https://clients.csod.com/phnx/driver.aspx?routename=Social/Topic/Posting/DiscussionPostingDetails&Posting=89814&Root=124>
2. Select the correct .zip file according to your Cornerstone portal's region and swimlane.
3. After installing the .zip file according to instructions on page 8, the General Availability CSOD Learn App will need to be blocked so that end users do not see both apps. Search for CSOD Learn App from Admin Teams settings, select the CSOD Learn app that says custom app as NO, and the status toggle to Blocked for this app. It will take a while for changes to reflect on end user side. (App permission policies found here: <https://docs.microsoft.com/en-us/microsoftteams/admin-settings>)

*In order to determine the correct swimlane for your portal, visit <https://csod-external.force.com/supportcentral/s/article/Where-can-we-find-our-swimlane-status>