



Slack 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 within Slack .



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Slack Learning in the Flow

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

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

Long gone are the days of needing to navigate your Learning Management System for premium learning content. Access your training catalog through Slack 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 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

The integration between Slack and Cornerstone will require a Slack License and enablement in both Slack and Edge Marketplace (Cornerstone).

With this integration:

- Cornerstone does not sell or resell or otherwise distribute Slack's public API.
- Customers who will be using the API integrated application are required to purchase Slack license separately.
- Cornerstone only retains responsibility towards our part of services not with regard to the services of Slack
- This enablement is only available in Cornerstone stage and production environments, not available in pilot and demo environments

Step 1. Security Permissions in CSX

Security Permissions in Cornerstone CSX 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](#).

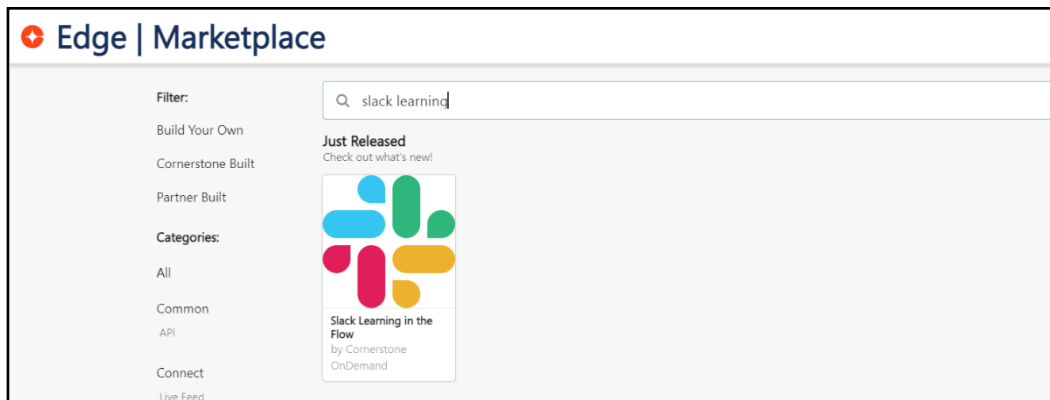
Edge Permissions

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

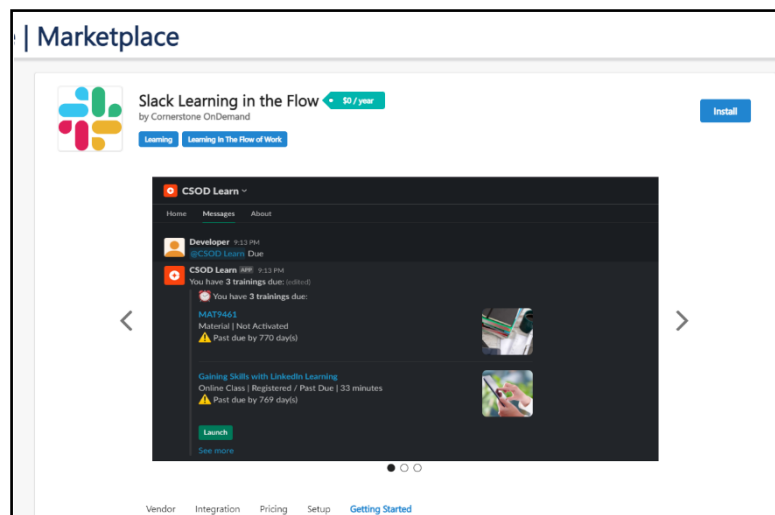
- **Edge Marketplace - Manage**
Allows administrator access to Edge Marketplace.
- **Edge Integrations - Manage**
Allows administrator access to Edge Integrations.

Step 2. Access the Edge Marketplace

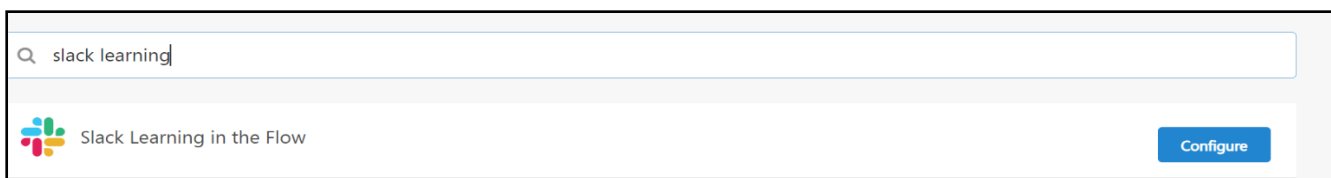
This enablement is only available in Cornerstone stage and production environments, not available in pilot and demo environments.



1. The Slack Learning in the Flow Integration is available for configuration in the Edge Marketplace.
2. Navigate to Admin > Tools > Edge > Marketplace.
3. Search for and select the **Slack Learning in the Flow** tile
4. Click the “Install” button
5. Review and accept the Terms and Conditions.
6. Select Install to be navigated to the settings page



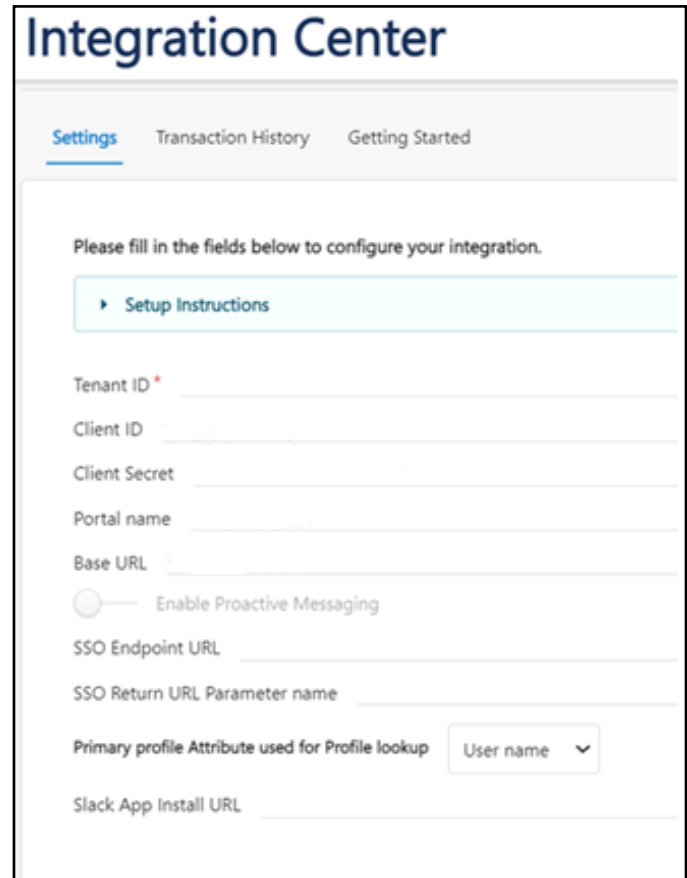
If you choose to configure later, you can access the integration by navigating to Admin > Tools > Edge > Integrations, searching for the integration by name, and selecting **Configure**.



Step 3. Edge Integration Setup

Within the Edge Integration (Admin > Tools > Edge > Integrations>Slack), Click the integration title “Slack Learning in the Flow”. You will need to enter the following information:

- **Workspace ID:** Enter the [Workspace ID](#) for your Slack 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 Slack .
- **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 configured with more than one, choose the SSO Endpoint URL that is used by the majority of your Slack users. If your portal does not have SSO configured, leave blank.
- **SSO Return URL Parameter name:** This value is either RelayState or return URL 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
- **Slack App Install URL:** [Copy the URL for Installation](#)



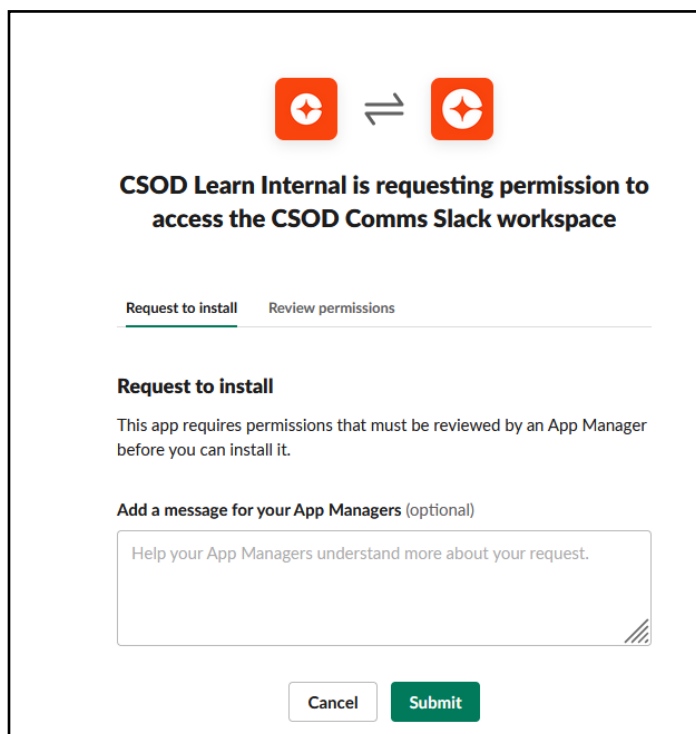
The screenshot shows the 'Integration Center' interface with tabs for 'Settings', 'Transaction History', and 'Getting Started'. The 'Settings' tab is active. Below the tabs, there is a message: 'Please fill in the fields below to configure your integration.' followed by a 'Setup Instructions' button. The form contains the following fields: 'Tenant ID *', 'Client ID', 'Client Secret', 'Portal name', 'Base URL', a toggle for 'Enable Proactive Messaging', 'SSO Endpoint URL', 'SSO Return URL Parameter name', 'Primary profile Attribute used for Profile lookup' (with a dropdown menu showing 'User name'), and 'Slack App Install URL'.

Install the CSOD Learn App in Slack

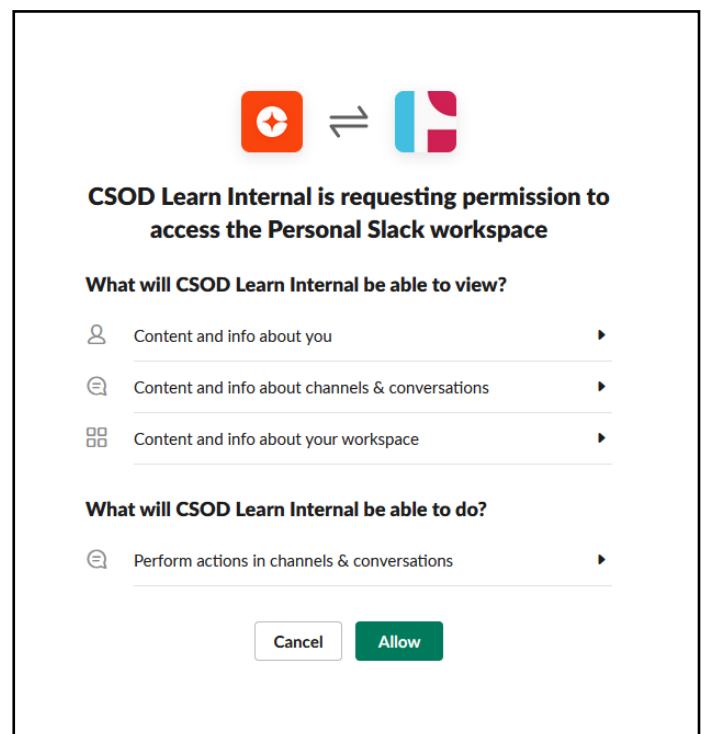
Admin User Installation

After the integration has been configured and enabled from in Cornerstone Edge. Client needs to copy the Slack Install URL displayed on the Slack Edge tile and share it with their Slack Admin user, Slack admin user needs to open the URL in a browser window and choose the workspace they want to install (refer to attached image). Workspace selected should be same as configured in the Edge tile.

App needs to be installed on each workspace manually and the workspace ids needs to be added to Slack edge tile as comma separated value.



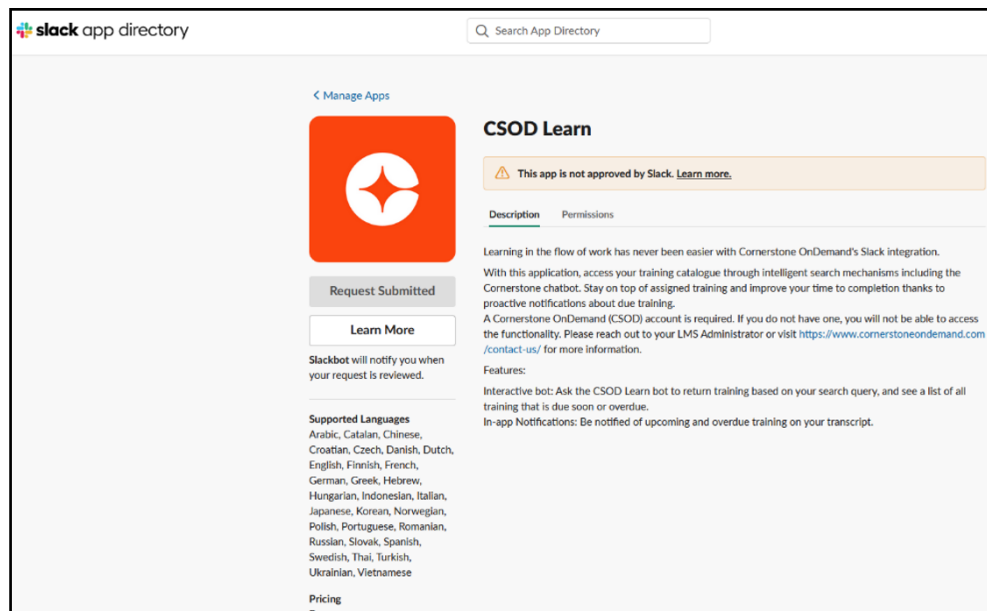
The screenshot shows the 'Request to install' screen for the CSOD Learn Internal app. At the top, there are two red square icons with a white star, connected by a double-headed arrow. Below this, the text reads: 'CSOD Learn Internal is requesting permission to access the CSOD Comms Slack workspace'. There are two tabs: 'Request to install' (active) and 'Review permissions'. Under 'Request to install', it says: 'Request to install' followed by 'This app requires permissions that must be reviewed by an App Manager before you can install it.' Below that is a section 'Add a message for your App Managers (optional)' with a text area containing the placeholder text 'Help your App Managers understand more about your request.' At the bottom are 'Cancel' and 'Submit' buttons.



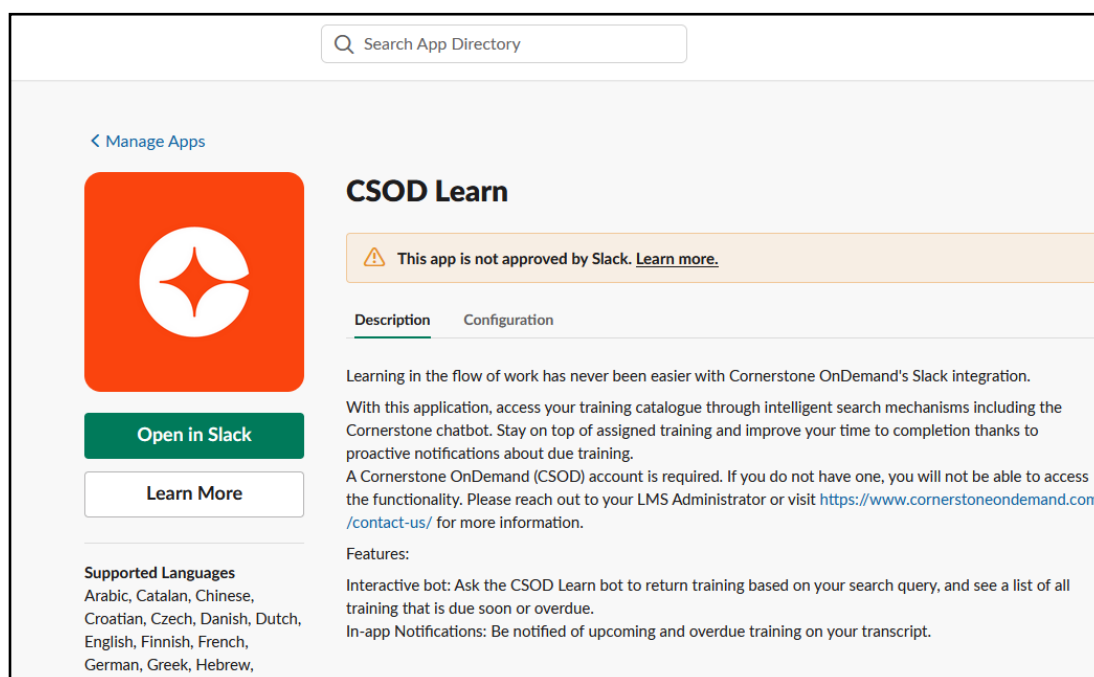
The screenshot shows the 'Review permissions' screen for the CSOD Learn Internal app. At the top, there are two icons: a red square with a white star and a Slack logo, connected by a double-headed arrow. Below this, the text reads: 'CSOD Learn Internal is requesting permission to access the Personal Slack workspace'. There are two sections: 'What will CSOD Learn Internal be able to view?' and 'What will CSOD Learn Internal be able to do?'. The first section has three items: 'Content and info about you', 'Content and info about channels & conversations', and 'Content and info about your workspace'. The second section has one item: 'Perform actions in channels & conversations'. At the bottom are 'Cancel' and 'Allow' buttons.

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.



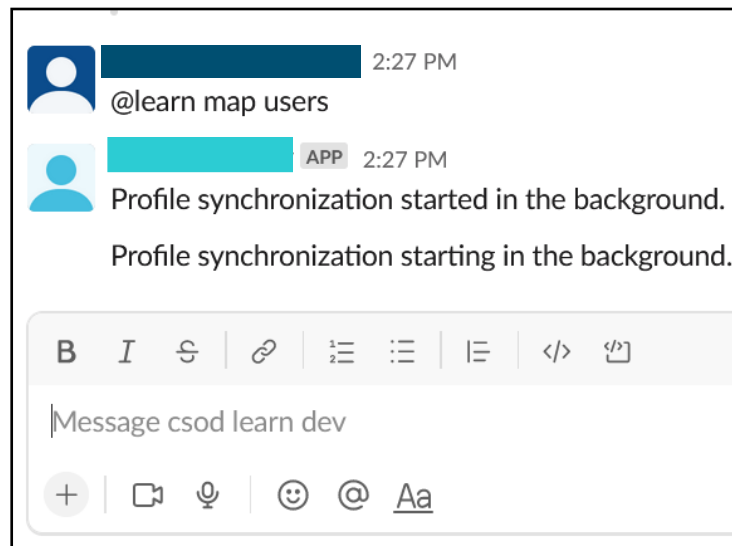
Selecting the **Add** button will finalize the installation process. The app will connect to the user's Cornerstone record using the configurations determined during the Edge Integration Setup.



Configuring the User Mapping

Slack user mapping to CSOD LMS is created on their first interaction with CSOD Learn App. Mapping is done based on the Slack email mapping to either username or email attribute in CSOD LMS. Mapping attribute is configurable by Edge Marketplace [not during beta stage].

For Proactive notification to work for the users who have not interacted with the App, Slack admin user can send a bot command “@learn map users”. This will start the mapping process in the background.

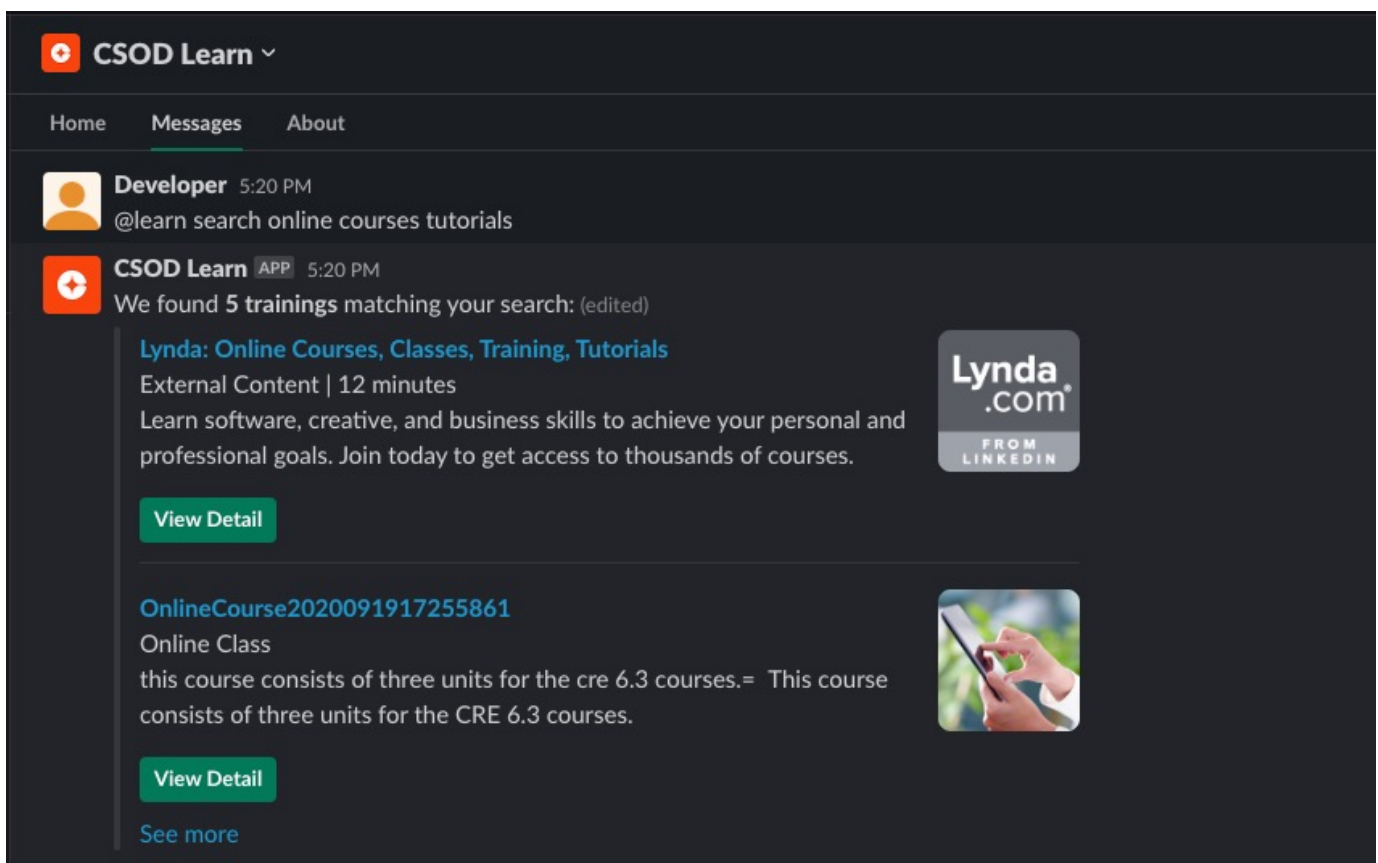


Using the CSOD Learn Bot

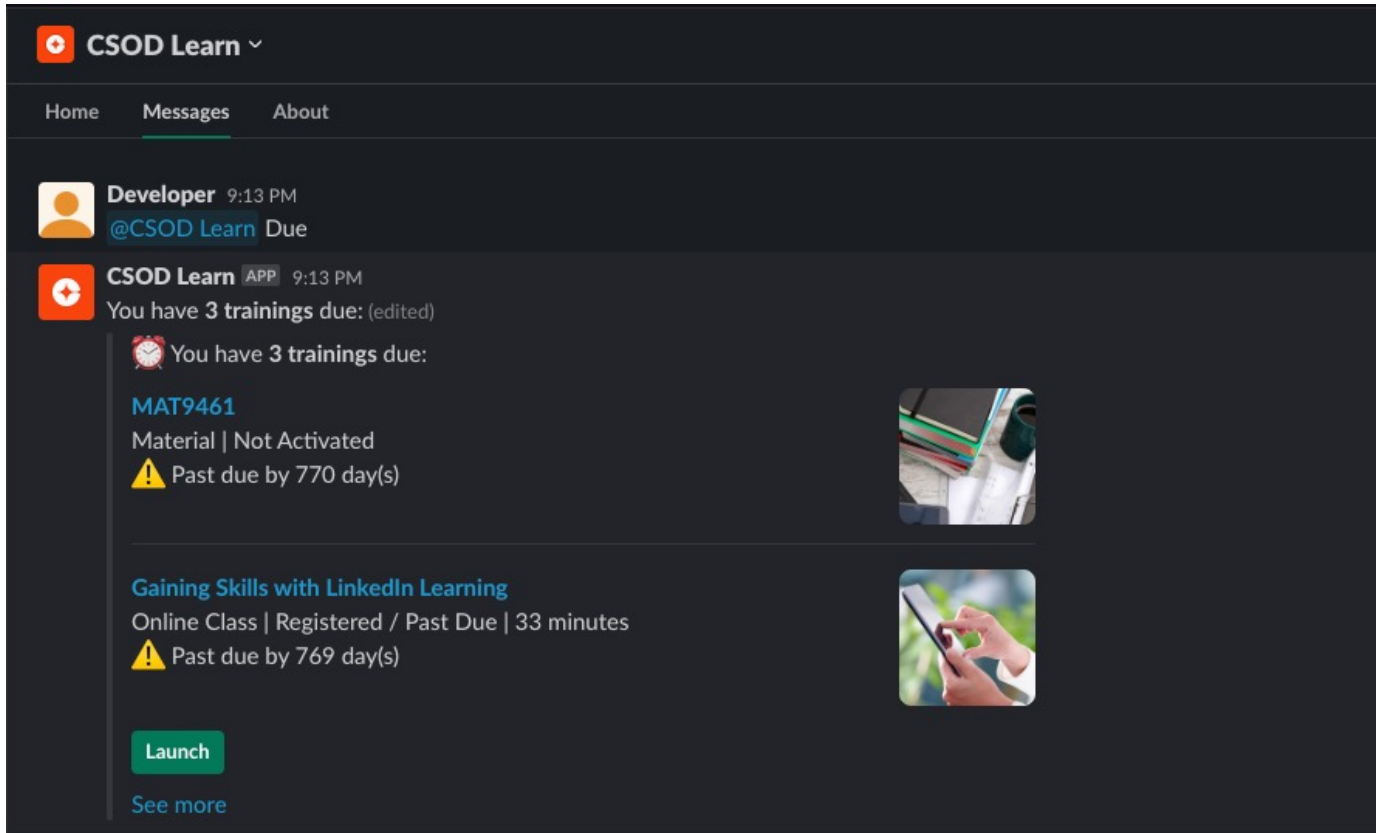
After installation, the CSOD Learn bot is accessible from the user's **Chat** or as a separate tool in the **SideBar** on the left-side of the screen.

Upon installation, users will receive a welcome message from the CSOD Learn bot explaining the available functionalities:

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.

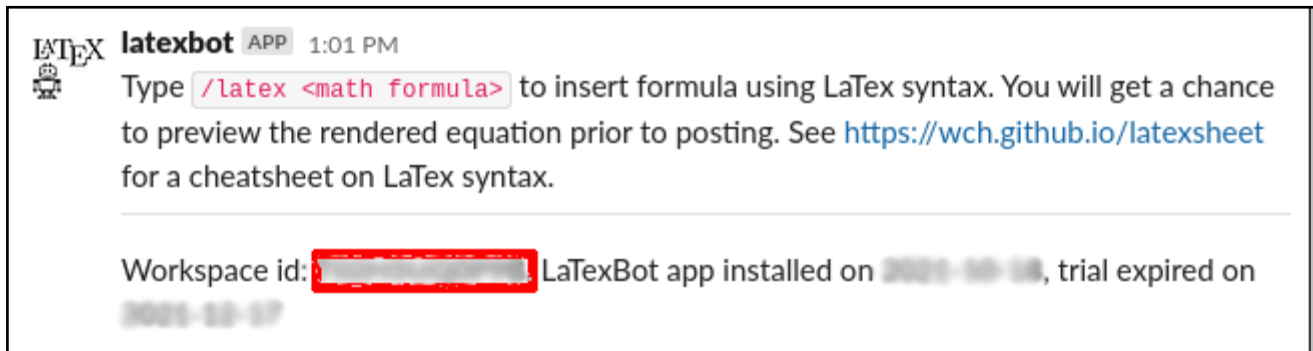
Clicking on the **Launch** button (available for training on the user’s transcript where Launch is applicable, e.g. Material, Video) will open the content directly into a new window. This action will be available only if the training is already on the user transcript and Launch is an available action 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.

Appendix

Appendix A: Finding your Workspace ID from Slack App

Assuming LaTeXBot app has been installed in your workspace, simply type `/latex` in any channel to find out the workspace id. The following snapshot shows a sample output from the `/latex` command:



The uppercase strings highlighted in red is the workspace id.

Appendix B: Finding your Workspace ID from the browser

1. Open your web browser, then sign into your Slack account.
2. When you're logged in, go to your main workspace page, and take a look at the URL in the search bar at the top. (If the desktop app opens up, switch back to the browser and click on "use Slack in your browser").
3. The URL goes like this: `https://app.slack.com/client/T...` The numbers and letters starting with "T" represents the team ID.
 - E.g., If URL is `https://app.slack.com/client/T1A2B3CDE`
 - Then team id is **T1A2B3CDE**