Cornerstone Branding & Content Implementation Considerations

10-23-24

Overall Content & Branding Considerations

1 Define / Understand Organizational Units, Users, and Divisions.

2 Gather Overall XTG Portal Branding / Assets.

3 Determine need for Sub-Branding & Content for Welcome and/or Custom Pages per Division.

4 Tailor the User Experience for Welcome Page and Learner Home Page Content.

5 Define Learning Subjects per OU / Division and Add Learning Content.

Cornerstone XTG Training Overall Portal Branding Guidelines

3 Main Branding Configuration Areas

- General Branding
- Header
- Login

Must have the **'Manage Site'** permission, such as Administrator or possibly sub-Admin.

General Branding

To configure general branding navigate to More > Admin > Branding > General.

User branding	Font	Logo	Theme configuration
User branding provides simplified profile banner management to ensure consistent branding across the organization.	Select from: – Open Sans (default) – Arial – Helvetica	We will need a **main logo** that is 40px in height (width does not matter). Should be a .png file no larger than 50mb.	Leave as the default or select the Accessibility friendly theme. Select the **primary color** as a HEX code.
We will need a **Profile Banner Image** 1200px in width and 209px in height.		**Favicon** or image that appears in the browser should be 120px X 120px.	The primary color is the main color representing your organization's brand. It is the base color for buttons, highlights, and selected items.
		Admin panel logo, which shows on all admin pages in the system. Same specs as main logo.	

Header Branding

Navigate to More > Admin > Branding > Header

- Header Background Color – Hex Code
- Create Button Background – Hex Code
- Search Background Color – Hex Code
- Menu Icons and Text Color – Hex Code

Login Branding

Navigate to More > Admin > Branding > Login

Configuration of Login branding is more than defining the branding elements that users see when they log into the system. It is also about the facilitation of how they log into the site.

Sign Up	Sign Up Restrictions	User Acceptance	Messaging, Look, & Options	Login Page Authentication
Enable for SSO When force SSO is enabled, the user will be automatically directed to your identity provider (e.g. Okta, Microsoft Azure Active Directory, etc.) without having to click the SSO button when logging in – This setting shuts down the login page **– This is the recommended configuration**	• Allow only sign-ups from specific domains • Restrict only sign-ups from specific domains • No Sign-Up Restrictions	When the 'user acceptance' prompt is set to required, a user acceptance message, like 'terms and conditions' can be configured.	• Main title • Sub-title/message • Message below login button • **Login Page Background Image** should be 710 x 770px	Designate which SAML for SSO login options should be enabled
Enable Self-Sign Up				
Allow People to Sign Up				

Email Custom Colors

Admin > Settings > Team

To customize email notifications with your organization's brand colors, the enable email custom CSS setting needs to set to 'On'.

Set the following color values:

- Email Header Background Color – Hex Code

- Email Font Color – Hex Code

- Email Button Color – Hex Code
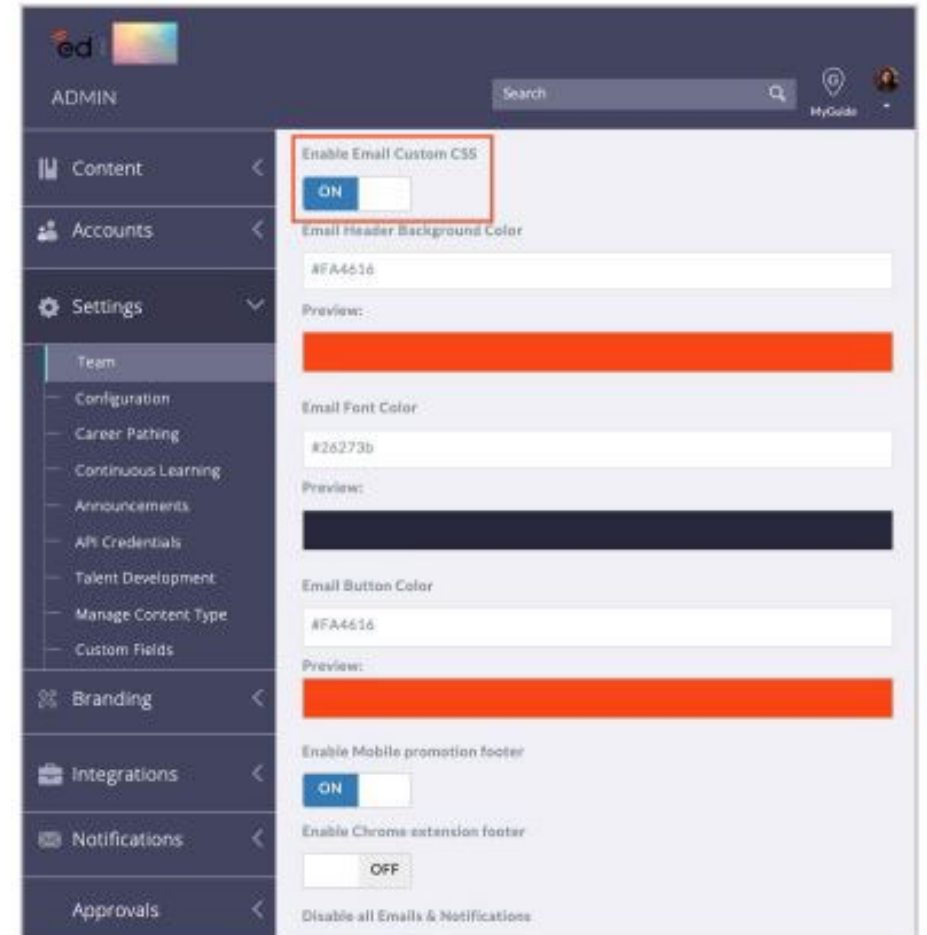
Tailor the User Experience

Customizations, Navigation, Homepage Content, Feed Items

Key Configurations:

- Brand your site to extend your company's culture.

- Select login method.

- Set the Onboarding process.

- Define top menu navigation and profile elements.

- Arrange Discover page carousels.

Organizational Units and Users Overview

- Also called OUs – capture, store, and categorize data in your portal.

- There are 5 primary OU's. These are "Division, Position, Cost Center (Department), Location, and Grade".
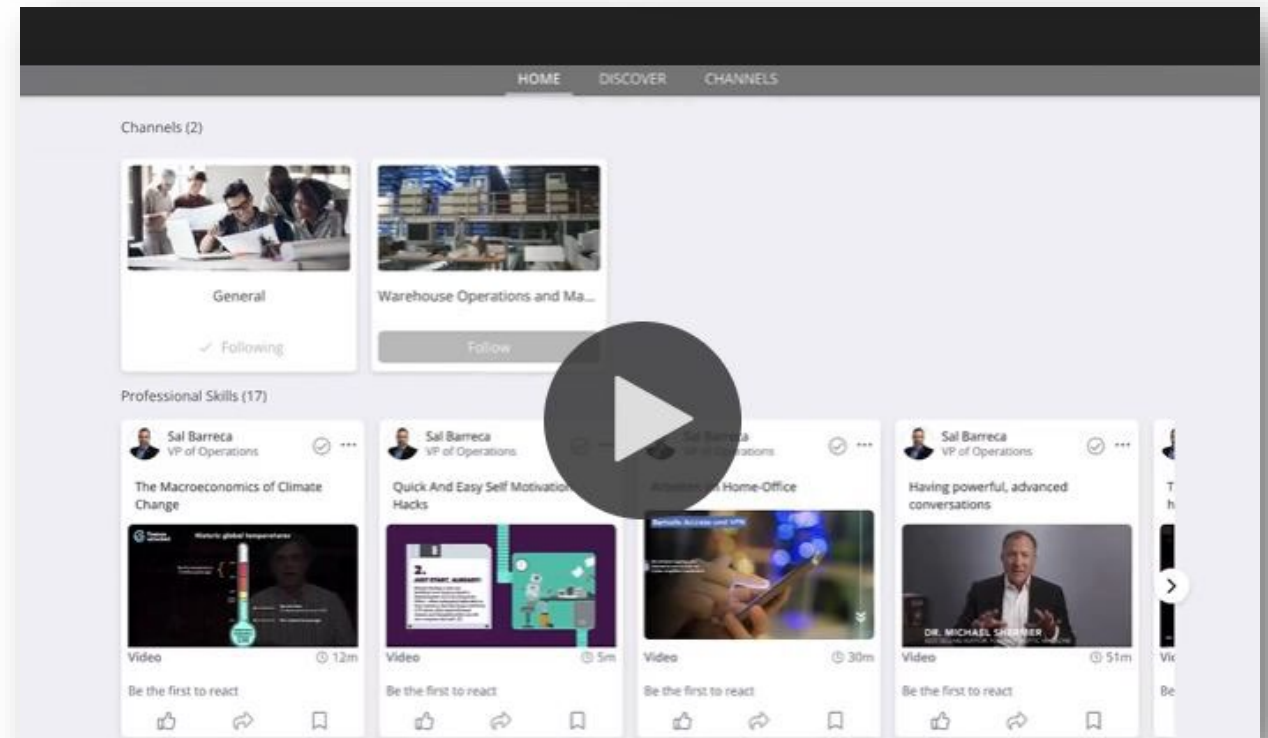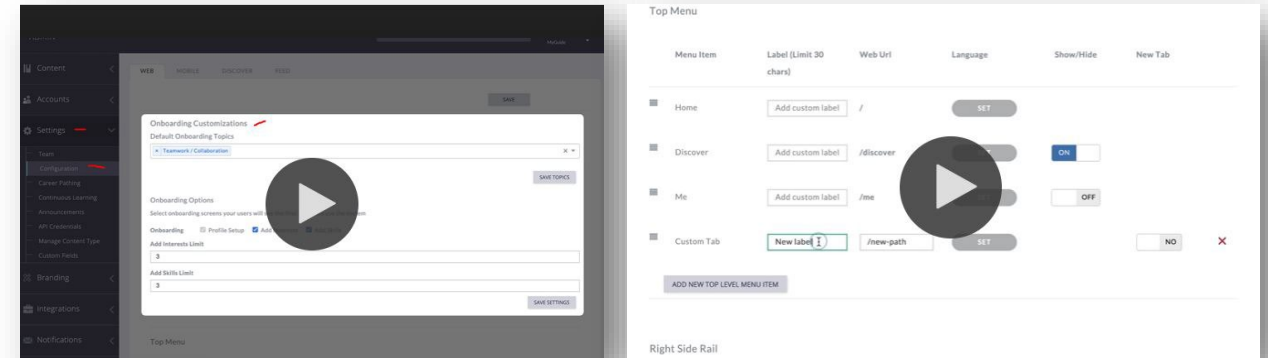
- OU's help organize your hierarchy. For example, a state may be a parent OU, with cities as child locations.

- You can set-up a portal hierarchy to match your HR IS.

- Once you create your OU structure, you add users to the system.

- Users can be added from a feed from your HR IS or you can manually add. Each user has a record that includes data such as Employee Name, User ID, and Contact information.

- Associate users to the OU structure. They can have only ONE association for each OU type.

- You can also use custom fields to capture employee information.

- Once OUs and Users have been added you can create Groups which are a type of organizational unit that you can customize.

- Use OUs to make learning available to users in a specific Division.

- Assign performance tasks to users in a specific position.

Navigation in Cornerstone

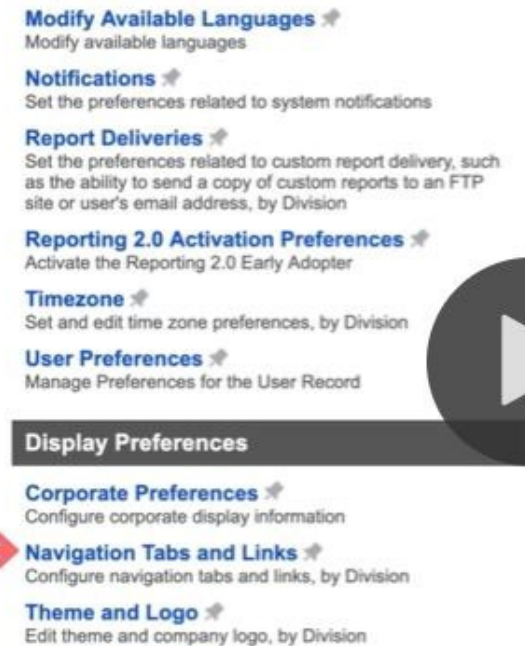- Navigation components are found at the top level and the page level.

- The Top Level is Universal, meaning always accessible. This includes the Search Bar, Notifications, User Menu, More Menu, Create, and Quick Access Page.

- Page tabs are at the top and include links to popular pages, like Home, Discover, and Me.

- As an admin you can customize the LX. You can change the order, add custom tabs, etc.

Display and Navigation in the Cornerstone Core System

- Visual Display Options are found under the Configuration Tools under Core Functions

- The 3 options are Corporate Preferences, Navigation Tabs and Links, and Theme and Logo.

- You can add your corporate logo in the header and support information in the feedback link at the bottom of every page.

- The Portal Name Configuration is what shows in the Browser Header or Tab.

- Navigation Tabs and Links control the pages that users see in the portal.

- When a link is deleted, the associated page is not deleted.

- Both the name of the link and the order of the link can be changed.

- Custom pages can be added to the navigation tab.

- You can also set the theme type to Responsive, etc.

- Primary colors, corporate logo, and header logo can be added through here as well.

- Software notifications can be set such as maintenance.

Modify Available Languages
Modify available languages

Notifications
Set the preferences related to system notifications

Report Deliveries
Set the preferences related to custom report delivery, such as the ability to send a copy of custom reports to an FTP site or user's email address, by Division

Reporting 2.0 Activation Preferences
Activate the Reporting 2.0 Early Adopter

Timezone
Set and edit time zone preferences, by Division

User Preferences
Manage Preferences for the User Record

Display Preferences

Corporate Preferences
Configure corporate display information

→ **Navigation Tabs and Links**
Configure navigation tabs and links, by Division

Theme and Logo
Edit theme and company logo, by Division

Header Logo
Select Logo: CUlogorgbBLUE_Koral.png
Logo: **Cornerstone**
Remove

Upload New Header Logo
Upload | Choose File | No file chosen

Support Information
Support Email: helpdesk@company.com
Support Phone: 555-555-5555

Creating a Successful Learner Home Page

Start By:

- **Preparing Your Content**
  - Organize Subjects
  - Update training metadata
  - Set thumbnail images (Learner Home Training Items - 660px Wide and 336 pixels High, Other System Areas – 200px X 200px)
  - Flag training (E.g., Exclude or Make Mandatory)

- **Customizing Your Page Preferences**
  - Learner Home Preferences set by Division
  - Upload a Cover Image (1920 px Wide x 130 Height px) – Click see preview link or reset link to re-create.
  - Content Arrangement (Drag and Drop order and/or Enable and Disable as needed)
  - Update the Introduction and/or Custom Banner on the Learner Home Page (915px Wide X 280px Height with padding or 814px wide by 280px Height without padding - they can't display at the same time). You can also include Display Text, Enable Action Button with link.
  - Enable or Disable the Training sidebar display - displays training hours calculation
  - You can choose to Overwrite custom settings for all child Divisions.

Learning Experience Home Page

- The home page is **divided into multiple widgets and feeds** which can be configured in the admin console.

- The **user block** displays profile picture and banner image.

- **My learning plan** widget lists the most recent assignments regardless of completion status.

- **Announcements** that let you communicate information to users, you can embed images, videos, text, and links.

- **My Learning Queue** widget organizes your bookmarked content.

- **Team Activity Flyout** creates a social environment for learners to interact – can use comments and/or actions.

- **Learning Feeds**

- **Today's Insights** generates training based on your goals that you select during onboarding.

- **Team Learning** displays content from channels, groups, and users your follow.

- **My Assignments** presents any assigned content you have yet to complete, to avoid redundancy either activate this or the Learning Plan Widget.

- **Featured Feed** – content that should be highly visible
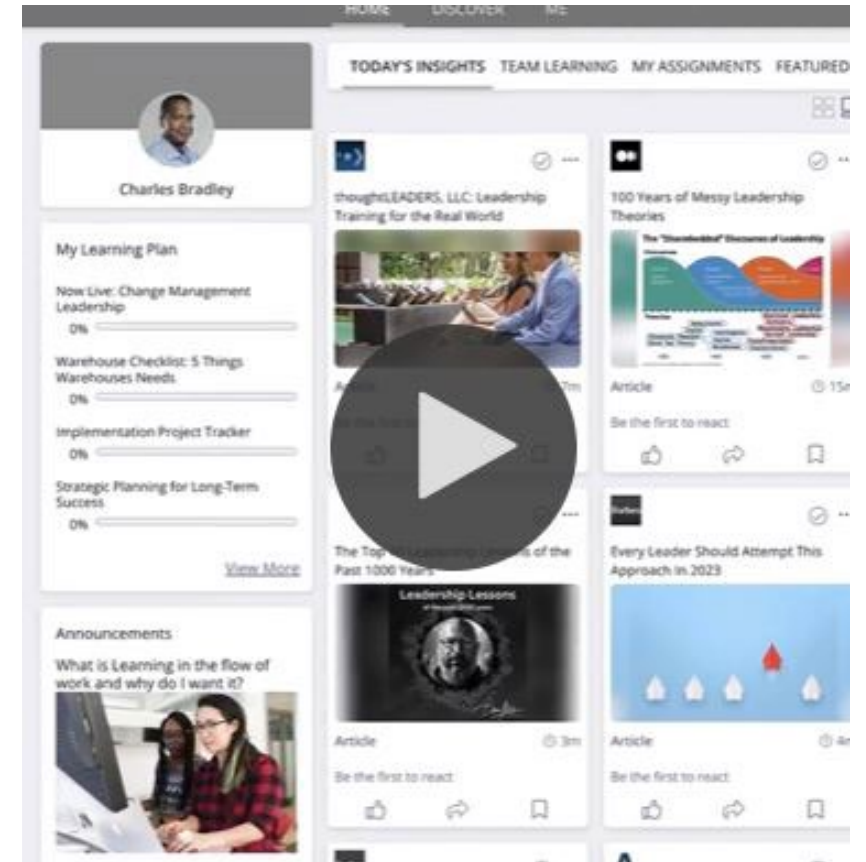
# Creating Welcome and Custom Cornerstone Pages

Welcome Pages

- A Welcome page is the **first page users see when they login to the portal**. Organizations use them to personalize the employee experience in your portal.

- They can convey your brand and provide access to transcripts and requests and link to important areas in the system.

- Default page for the parent Division, Child Divisions initially inherit configurations of the parent.

- You can customize pages to different users to customize their experience, this is done by the **Divisions**. Example: Manufacturing employees vs. Accounting.

- Select the Division to customize its welcome page.

- In the builder view you can add a header and description and set parameters for displaying the page.

- You can use **pre-built widgets** to drag and drop into the page. Configure your workspace first (rows and columns, etc.).
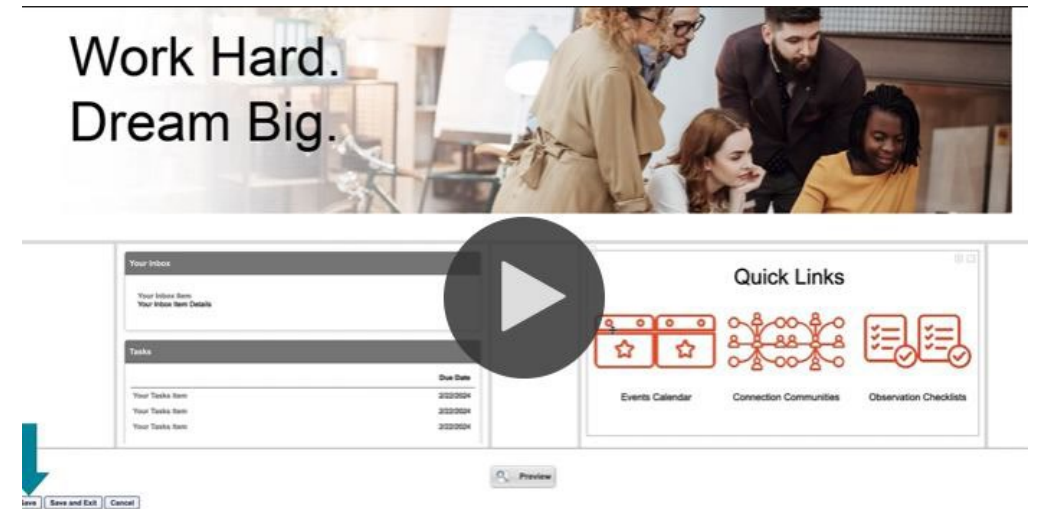
Custom Pages

- Like Welcome pages but there are differences.

- A welcome page is a home page users see when they login to your portal and is associated to their organizational unit.

- A custom page is **a new screen** that you design, create, and make available to users through navigation tabs and links.

- For example, you can create a custom page to communicate benefits information to all employees or one for New Hire, or Market Training Programs to Customers, etc.

- Create your page and make it available to the specific audience.

- Can include documents, images, videos, links, forms, and more.

- Can be accessed from Core Preferences or Function in Config Tools.

- You can preview, edit, and copy a page. You can delete it if it's not currently visible in your portal.

- You must make it available through navigation tabs and links and select the OU of the users who can access it.
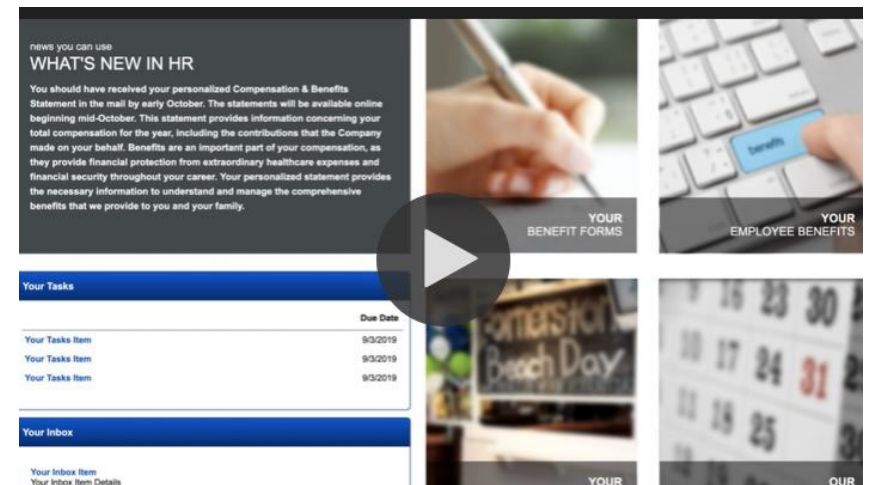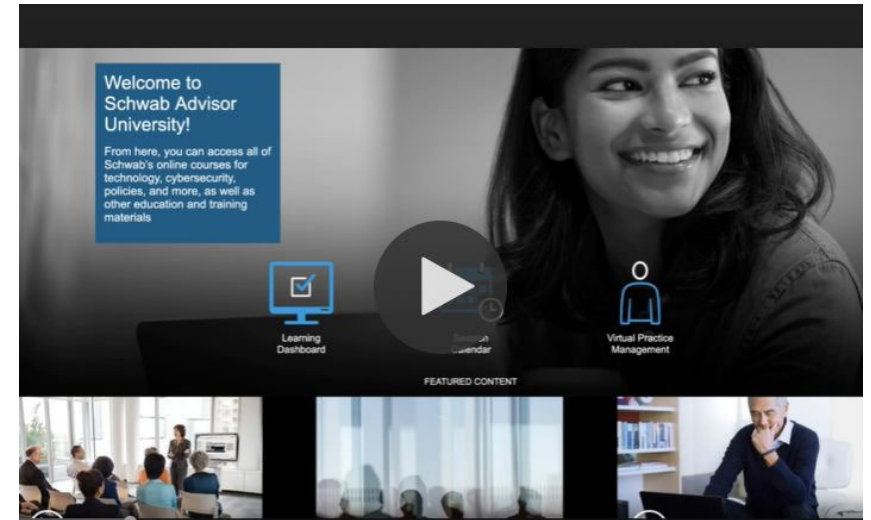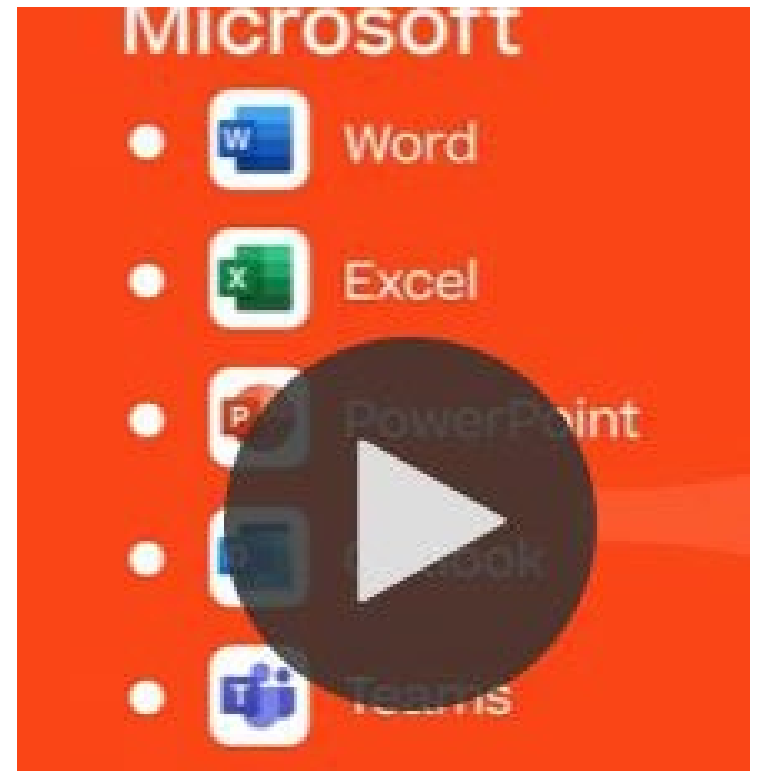
Cornerstone Subjects

Creating Subjects in Cornerstone

- **Subjects** are a part of your portals meta data.

- They are **used to categorize** learning objects, track training, and simplify the learning search experience.

- Every learning object you create is **required** to have a subject.

- Creating and managing subjects is done on the subject management page.

- **Branch view** allows Parent and Child subject views. E.g. Microsoft products being Parent subject and Applications being child subjects.

- Subject names can be edited and deleted as needed.

- Subject names are **linked** to the global search page.

- You can also **run a report** to see all the subjects in Excel file.

Resources

Cornerstone Success Center Videos

- **Learning Experience Site Configurations Overview**
  https://clients.csod.com/LMS/Video/LaunchVideo.aspx?loid=3a634421-34a8-441d-a8c9-1c08c5f4cd55

- **Creating a Successful Learner Home Experience**
  https://clients.csod.com/LMS/Video/LaunchVideo.aspx?loid=9e49c704-fa2d-4e0c-b2e7-d415838a75f1

- **Learning Experience Home Page**
  https://clients.csod.com/LMS/Video/LaunchVideo.aspx?loid=2c7b95f4-8e2e-429f-b955-0c904666d24c

- **Creating Subjects in Cornerstone Learning Management**
  https://clients.csod.com/LMS/Video/LaunchVideo.aspx?loid=fc1ae6b1-5634-4001-a2e3-03c4ef71218c

- **Custom Pages**
  https://clients.csod.com/LMS/Video/LaunchVideo.aspx?loid=95cfc98d-1fee-4a04-bcb1-f75004c7e72c

- **Building a Welcome Page**
  https://clients.csod.com/LMS/Video/LaunchVideo.aspx?loid=48f60a2f-b2a9-4225-ba80-6a071dabc730

- **Organizational Units and Users Overview**
  https://clients.csod.com/LMS/Video/LaunchVideo.aspx?loid=aea2f91f-bd99-4c80-9178-bead51841866

Custom Login Page

- Can't find this tool in our test site.