CYPHER Learning

CYPHER CONNECT RECIPE BOOK

More to come so check back for the latest recipes!

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Introduction

Welcome to the CYPHER Connect recipe book, a comprehensive showcase of the workflows and automations that we've already built to empower businesses like yours. This guide is designed to demonstrate how our pre-built recipes can seamlessly connect your systems, streamline processes, and deliver measurable results.

What is a recipe?

A recipe is a specific set of automation instructions that bridges your systems, enabling them to work together. Each recipe defines:

- **A trigger**
  The event that starts the automation
- **Actions**
  The tasks performed across integrated systems in response to the trigger

Think of a recipe like a proven formula: the ingredients (systems and data) and steps (automated actions) come together to achieve a specific goal with precision and efficiency.

Before you dive into using the recipes in this book, let's make sure you've got everything you need. Think of these as the "ingredients" for building smooth, automated workflows.

Access and permissions

You'll need access to your apps. Make sure you have:

- Logins or API keys for the apps you're connecting
- The right permissions to pull data or make changes
- Security set up to keep everything safe

Recipes can't run without proper access, just like you can't bake a cake if you can't open the oven.

Game plan

Before jumping in, think about what you want to automate. What's the trigger?

What's supposed to happen next?

- **Example**

  When a new hire is added in Workday, you might want to:

  1. Enroll them in training courses
  2. Send a welcome email
  3. Notify their manager on Slack

Having a plan makes everything run smoother, like knowing the recipe before you start cooking.

Clean data

Make sure your data is up to date, organized, and ready to roll.

- Standardize field names (e.g. first name vs. full name)
- Double-check for outdated or incomplete info

Clean data keeps everything running smoothly and avoids unexpected hiccups.

Teamwork

Most automations cross multiple teams, so involve the right people early.

- **IT team**

  To help with access and integrations
- **End users**

  To test and make sure everything works as expected
- **Stakeholders**

  To confirm the automation aligns with the bigger picture

Collaboration helps everyone get everyone aligned, so you're not reinventing the wheel later.

Goal

What's the end result you're hoping for? Whether it's saving time, cutting down on errors, or just simplifying life, define your goals up front.

Knowing your "why" helps you measure success and stay focused.

ADP Workforce Now

1. Onboarding automation

- **TRIGGER**

  New employee added in ADP
- **STEPS**
  1. Fetch new employee data from ADP
  2. Create an LMS account and enroll them in onboarding courses

BambooHR

1. Employee onboarding

- **TRIGGER**

  When a new employee is added to BambooHR, add them to CYPHER
- **STEPS**
  1. Create a new user in CYPHER
  2. Enroll the user in onboarding courses

2. Performance reviews

- **TRIGGER**

  When an employee completes specific training
- **STEPS**
  1. Sync training data with BambooHR performance review modules

Notes

1. BambooHR only has triggers for new and updated employees
2. BambooHR does not allow you to get employee information unless you pass the employees' BambooHR ID in the request for information. This requires storing the BambooHR ID in CYPHER to be able to update employee information in BambooHR.

HubSpot

1. User account creation in CYPHER

- **TRIGGER**

  When a new user is created in CYPHER, CYPHER triggers an automation that captures user creation details from CYPHER. The details are sent to a HubSpot form endpoint to create a corresponding contact in HubSpot.
- **STEPS**
  1. Create a new user in CYPHER
  2. New user details are sent to a custom form via an HTTP call
  3. A new contact in HubSpot is created

2. Course progress tracking and update

Currently, there is no trigger specifically for saved course progress in CYPHER, so in order to track the course progress percentage, two recipes will be used: assessment submission and module completion.

Assessment submission

- **TRIGGER**

  When a learner submits an assessment in a course in CYPHER, update the course properties of the HubSpot contact
- **STEPS**
  1. A user submits an assessment while taking a course in CYPHER
  2. The custom course properties in HubSpot will be updated with information about the latest course the learner took

Module completion

- **TRIGGER**

  When a learner completes a module in a course in CYPHER, update the course properties of the HubSpot contact
- **STEPS**
  1. A user completes a module while taking a course in CYPHER
  2. The custom course properties in HubSpot will be updated with information about the latest course the learner took

Marketo

1. Email campaign for course setup

- **TRIGGER**

  New course is published in the LMS
- **STEPS**
  1. Fetch course details from LMS
  2. Activate a smart campaign in Marketo to notify users

2. Lead nurturing via learning content

- **TRIGGER**

  When a new lead is added in Marketo
- **STEPS**
  1. Check that the lead is new rather than updated
  2. If lead doesn't exist in CYPHER, create the user in CYPHER
     - Assign course
  3. If lead does exist in CYPHER, check if they're already enrolled in the course
     - If they are, log that they're already enrolled. Otherwise, enroll the user in the course.

Salesforce

1. User management (Salesforce trigger)

- **TRIGGER**

  When a new contact or lead is created/updated in Salesforce
- **STEPS**
  1. Extract new/updated contact data from Salesforce
  2. Check if the user exists in the LMS
  3. Create or update the user in the LMS with provided details

2. User management (CYPHER trigger)

- **TRIGGER**

  When a user is created/updated in the LMS
- **STEPS**
  1. Extract new/updated user data from the LMS
  2. Check if the contact exists in Salesforce
  3. Create or update the contact in Salesforce with provided details

3. Course enrollment

- **TRIGGER**

  When a lead reaches a specific stage or status (e.g. "Qualified")
- **STEPS**
  1. Match Salesforce lead data with an LMS user
  2. Enroll the user in the specified course
  3. Update Salesforce with the enrollment status

4. Training progress tracking

- **TRIGGER**

  When a user completes a course in the LMS

- **STEPS**

  1. Fetch completed course data from the LMS
  2. Update the Salesforce contact record with course completion details

5. Certification management

- **TRIGGER**

  When a user earns a certification in the LMS

- **STEPS**

  1. Sync certification details from the LMS to Salesforce
  2. Attach certification information to the user profile

6. Account management

- **TRIGGER**

  When an organization is created/updated in the LMS

- **STEPS**

  1. Extract new/updated organization data from the LMS
  2. Check if the account exists in Salesforce
  3. Create or update the account in Salesforce with provided details

SFTP

1. Bulk user uploads

- **TRIGGER**

  Every 5 minutes, can be altered to trigger when a file is updated in SFTP

- **STEPS**

  1. Parse the CSV file
  2. Create or update users in the LMS
  3. Log errors for invalid rows

2. Export training data

- **TRIGGER**

  Scheduled daily/weekly

- **STEPS**

  1. Query training data from the LMS
  2. Format data as a CSV
  3. Upload to SFTP server

3. Course creation sync

- **TRIGGER**

  When a file is uploaded to a specific SFTP folder

- **STEPS**

  1. Retrieve the uploaded file
  2. Upload and configure the package in the LMS
  3. Validate successful upload

Snowflake

1. User creation in CYPHER Learning

- **TRIGGER**

  When a new employee is added to Snowflake, add them to CYPHER
- **STEPS**
  1. Create a new user in the LMS

2. Upload and insert user in Snowflake when a new user is added in CYPHER

- **TRIGGER**

  When a new employee is added to Snowflake, add them to CYPHER
- **STEPS**
  1. Query user
  2. If a user exists in Snowflake, update the user in Snowflake
  3. If the user does not exist in Snowflake, create a new user in Snowflake

Slack

1. Learning reminders

- **TRIGGER**

  When a learner is due to complete a course within a specific timeframe (e.g. 3 days before the deadline)
- **STEPS**
  1. Identify pending courses with due dates in CYPHER
  2. Send a direct message to the learner on Slack reminding them about the course deadline
  3. Update CYPHER log with the notification status

2. Course completion celebrations

- **TRIGGER**

  When a user completes a course
- **STEPS**
  1. Fetch course completion details from CYPHER
  2. Post a celebratory message in a Slack channel dedicated to achievements
  3. Optionally include the user's name and the course title

Workday

1. Sync employee profiles

- **TRIGGER**

  When a new employee is added or updated in Workday

- **STEPS**
  1. Fetch employee data from Workday (e.g. name, email, role, department)
  2. Check if the employee exists in the LMS. If they do, update the user.
  3. If not, create a new user in the LMS
  4. Assign course
  5. Email learner to notify them of enrollment in the course

2. Automate role-based training

- **TRIGGER**

  When an employee is updated in Workday

- **STEPS**
  1. Detect updated user in Workday, ensure their role is what changed
  2. Query CYPHER for that user
  3. Ensure there is only one user associated with the identifier in CYPHER
  4. Update user profile with new information
  5. Conditionally enroll the user in courses based on role

3. Employee offboarding

- **TRIGGER**

  User is updated in Workday

- **STEPS**
  1. Check that the user has been terminated, if not, stop job
  2. Deactivate LMS accounts upon termination in Workday
  3. Revoke access to sensitive training materials

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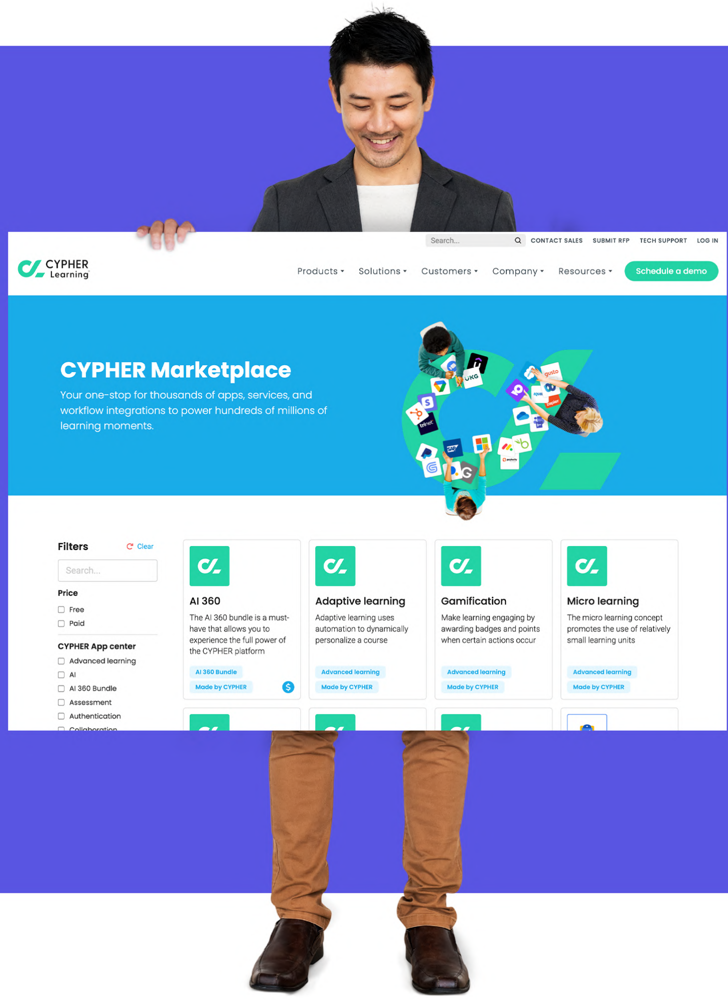

About CYPHER Learning

CYPHER Learning exists to give learners the power to succeed in a rapidly changing world. Trainers, learning and development (L&D) pros, HR pros, and educators get everything they need in one platform to deliver faster, more personalized, and better learning outcomes. We provide the only all-in-one AI-powered learning platform that is easy-to-use, beautifully designed, and built to power hundreds of millions of learning moments every day. Create courses faster. Train and teach better. Learn even quicker. Experience our "just in time, just for you, just the way you want to learn" approach that puts people first.

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