



SilkRoad Learning
What's New
2022.1 | February 2022

What's New video

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Qualification membership exclusion

Qualifications and Learning Plans now provide users with the ability to define both membership inclusion and membership exclusion rules when creating a qualification. This means a qualification can be pushed to users based on their membership criteria in a combination of job, group, job category, or organizational unit but exclude users whose membership criteria match any combination of job, group, job category or organizational unit.

Qualification Properties now includes a new option: Membership Exclusion.



Example 1: Exclusion using a single membership criteria

A company has a Customer Service qualification that pushes training to all Customer Service jobs in the organization. They have structured their jobs under categories, so there is a job category for all Customer Service jobs. However, the training associated with this qualification Learning Plan should not be assigned to any Customer Service Directors in Tulsa and any Customer Service Directors in Denver.

Membership inclusion

Here, membership inclusion is set up to go to all jobs in the Customer Service job category:

QUALIFICATION PROPERTIES Add Refresh

Membership Inclusion

Membership Cut Off Date

Jobs:

☒ Name
(none)

Total: 0

Add Remove Selected Mark All

Job Categories:

☒ Name
☐ Customer Service ⚙️

Total: 1

Add Remove Selected Mark All Add Delete

Membership exclusion

Here, membership exclusion is set up to exclude the two Customer Service Director jobs:

The screenshot displays the 'Membership Exclusion' configuration interface. On the left, there is a 'Jobs' list with two items: 'Denver - Director, Customer Service Ops [S]' and 'Tulsa- Director, Customer Service [S]'. A red arrow points from this list to a highlighted 'Membership Exclusion' dialog box. The dialog box also shows the same two jobs. The background interface includes sections for 'Organizations', 'Job Categories', and 'Groups', each with a search bar and 'Add', 'Remove Selected', and 'Mark All' buttons.

Result

The result for this inclusion/exclusion membership combination is that any user whose job is associated to the Customer Service job category will be required to complete the Learning Plan *except* those users whose job is at the director level in Tulsa or those users whose job is at the director level in Denver.

Example 2: Inclusion/exclusion using multiple membership criteria

Membership inclusion and exclusion may also combine more than a single criteria. For example, suppose a company has different training requirements based on multiple job categories and where the employee works. A qualification could be configured to push training to all Customer Service **OR** Human Resources jobs but only to those who work in California.

Membership inclusion

Here, membership inclusion is set up to go to all jobs in the Customer Service **OR** Human Resources job category **AND** who work in the California org unit.

The screenshot displays a configuration interface with three main sections: 'Jobs:', 'Job Categories:', and 'Groups:'. The 'Jobs:' section at the top left has a table with a 'Name' header and a '(none)' entry, with a 'Total: 0' below it. Below this are buttons for 'Add', 'Remove Selected', and 'Mark All'. The 'Job Categories:' section, located below 'Jobs:', contains a table with 'Name' headers and two entries: 'Customer Service' and 'Human Resources', each with a checkbox and three green dots to its right. It also has 'Add', 'Remove Selected', and 'Mark All' buttons. The 'Groups:' section at the bottom left is partially visible, showing a 'Name' header and a '(none)' entry. On the right side, the 'Organizations:' panel is highlighted with a red border. It features a search bar with a 'Go' button, a tree view showing a hierarchy of 'North America' > 'United States' > 'California', and 'Add' and 'Delete' buttons at the bottom.

Inclusion logic

When considering multiple *inclusion* criteria, the inclusion logic uses a:

- *LOGICAL OR* to determine inclusion within the *same* criteria
And
- *LOGICAL AND* to determine inclusion across *different* criteria

So in this membership inclusion example, users are included if they have a job that is included in Customer Service job category **OR** Human Resources **AND** work in the California org unit.

Membership exclusion

Here, membership exclusion is set up to exclude the Director, Customer Service Ops **OR** Human Resources Director jobs **AND** any employees who belong to the Exempted Employees group.

The screenshot displays the 'Membership Exclusion' configuration page. It features three main sections on the left: 'Jobs', 'Job Categories', and 'Groups', each with a table of items to be excluded. The 'Jobs' table lists 'Director, Customer Service Ops' and 'Human Resources Director'. The 'Job Categories' table is currently empty. The 'Groups' table lists 'Exempted Employees'. Each table has an 'Add' button and 'Remove Selected' and 'Mark All' buttons. On the right, there is an 'Organizations' section with a search bar and a 'Go' button. Below the search bar, there is a large empty area for organization selection, with 'Add' and 'Delete' buttons at the bottom.

Membership Exclusion

Jobs:

☒	Name	
☐	Director, Customer Service Ops	⋮
☐	Human Resources Director	⋮

Add **Remove Selected** **Mark All**

Job Categories:

☒	Name	
	(none)	

Total: 0

Add **Remove Selected** **Mark All**

Groups:

☒	Name	
☐	Exempted Employees	⋮

Total: 1

Add **Remove Selected** **Mark All**

Organizations:

Search: **Go**

Add **Delete**

Exclusion logic

When using multiple *exclusion* criteria, the exclusion logic works like the inclusion logic to determine the users that will be excluded from the Included users. Exclusion logic uses a:

- *LOGICAL OR* to determine exclusion within the *same* criteria
And
- *LOGICAL AND* to determine exclusion across *different* criteria.

So in this membership exclusion example), users are excluded for any users who have a job title of Director, Customer Service Ops **OR** for any users who have a job title of Human Resources Director **AND** they are members of the Exempted Employees group.

Help dashboard reorganized

The Help dashboard, which opens when you click Help in the Admin portal, is reorganized to make it easier to find the resources you need. The changes:

- Online Help opens now when you click the **Click here to view SilkRoad Learning Help** link.
- Additional Reference section contains links to PDF versions of the Administrator Guide, eBusiness Guide, and Supported Import Fields Guide. Report Queries opens as it did before.

 **HELP**

SilkRoad Learning Version 2022.1.0.309 [\(Details...\)](#)

[Click here to view SilkRoad Learning Help](#)

Additional Reference

[SilkRoad Learning Administrator Guide](#)

[SilkRoad Learning eBusiness Guide](#)

[SilkRoad Learning Supported Import Fields](#)

[Report Queries](#)

Technical Support

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More info

- Click [here](#) for full release notes.
- Click [here](#) for information about early adopter process, supported languages and browsers, and more.

Client support

For technical assistance for any of our solutions, contact our client support staff at:

- **International Toll Free:** Access numbers via SilkRoad Engagement Center
- **SilkRoad Engagement Center:** <https://engagementcenter.silkroad.com>
No access? Email support@silkroad.com for access.
- **Email:** support@silkroad.com