2023

Monthly Release Notes

- January

Prepared by
Eagle Point Customer Support Team

Eagle Point
Software

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ENHANCEMENTS AND REPAIRS

⌃ Pinnacle Series

Management Utility

The Pinnacle Series Management utility is a Desktop Application that is required for Pinnacle Series Administrators and Managers to set up, configure, and maintain the Pinnacle Series Platform.

⌃ Repair:
- Live Event Session Reports
  - ✓ Completed Sessions report showing zero results on summary, but Report Details does.
    - o Chart report was not looking for registrants belonging to other tenants, whereas the other report queries were. Changed the chart data to also include the out-of-tenant registrants

Browser Admin

The Administration Portal for Pinnacle Series allows your administrators to manage users and groups through a browser portal.

⌃ Repairs:

- **SSO - SAML**

  - ✓ Within the Administration Portal, the check box titled "User Identity Provider URL without SAML request data" was not functioning as it should. When needed, it had to be configured in the MU for this check box to function properly.
  - ✓ The checkbox now removes the SAML parameters for the request.

- **Azure AD Synchronization**

  ✓ **Auto AD User Sync not pulling in mapped user attributes; Manual AD Sync is working OK.**

    o It was reported that the admin browser was either adding users without the properties, or the display wasn't showing the properties for users that were already in Pinnacle Series. We also had reports that the summary will show the changes and then report back they were applied but when we re-ran the sync and summary the changes, in fact, do not take. Once a synchronization was run 3 times +/- the desired results were achieved. Once they were there, the account stayed as it should.
    o We added a fix for auto-sync, where the 'modify' was not correctly considering changes in mapped attribute values.

  ✓ **Azure AD Sync - Special Characters**

    o The Azure AD Sync preview attempted to add special characters to a group of users (modify) but after the sync goes through, the special characters were not added.
    o Dev team produced a workaround script, which can be requested from the support team that basically creates a new type with the correct fields, renames the original type and the new one, then refreshes the dependencies.
    o Saved and ran a manual sync of Azure AD in the Admin Portal. The Sync with Azure AD summary appropriately displayed the characters in the Modify screen, and the characters updated as expected once the sync was committed.

  ✓ **Users Page – Deleted users re-appeared after navigating away from the users' page and then navigating back.**

    ✓ Added logic to refresh the session storage for users when a user is deleted, or users are deleted. This will clear the memory during the delete service call and then rebuild it after the successful call.

- **External Learning Tracking**

  ✓ **Spreadsheet upload will not accommodate non-US formatted dates (dd/mm/yy)**

    o Import errors were reported when the browser's location settings for 'date' does not match our API's settings for dates.
    o Moved date parsing into the API and we now pass culture information through from the browser to be able to parse different date formats.
    o The email needs to be a valid email in Pinnacle, the completed date needs to be a valid date, and attribute values need to be valid for their type, etc. It is worth checking which user attributes are required fields under the external learning tracking setup before actioning an external learning tracking import. The following data fields are required-map attributes for importing external learning tracking records (email, completed date, and training title).

API

At Eagle Point Software, we believe integrating Pinnacle Series with other third-party systems is key to the success of your learning programs for increased business performance. The Pinnacle Series API can speed up processes by automating time-consuming manual steps.

Repair:

- **V2 Users endpoint timing out**

  ✓ Updated users' method to separate out property and manager calls. This has dramatically sped up the query.
  ✓ The new v2 getallusersmini logic was not trimming the email address that was returned and caused multiple domains for the same value to appear in the users filter in the front end because of the differences with trailing spaces in the comparison.

## KnowledgeSmart Integration and Personalized Learning
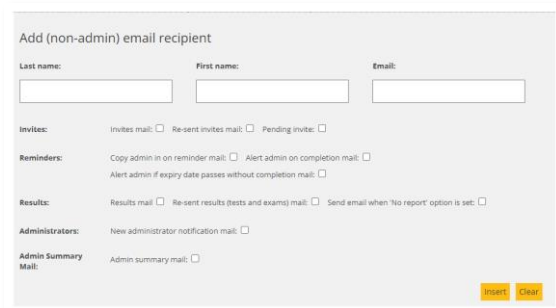
KnowledgeSmart

> KnowledgeSmart offers a skill assessment platform with over 84 off-the-shelf skill assessments. Skill assessment invites can be initiated via manager invite, self-enrollment or browser administrator login.

Enhancements to Invites Workflow

- We added a new feature that allows KS admins to copy non-admins on invites and results emails, for skills assessments, general surveys, and skills audits.

  ✓ Go to the Settings > System mail page of your KS admin dashboard.
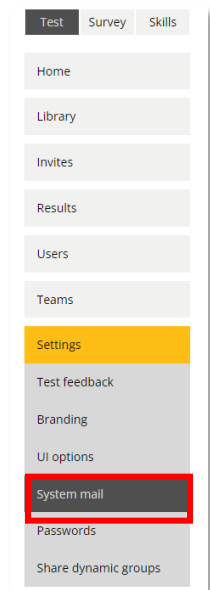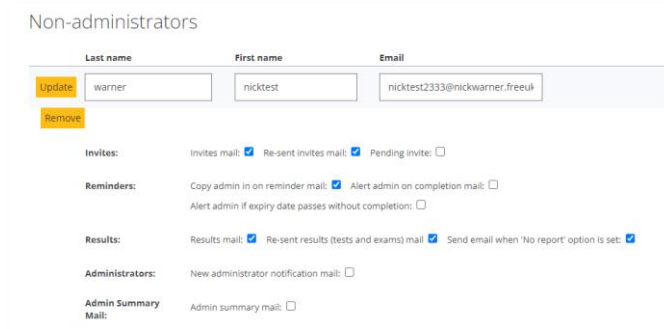
  ✓ Scroll down to the light-gray panel at the bottom of the page.

  ✓ Add your contacts as '(non-admin) email recipients'. Select the relevant system emails that you would like them to be bcc'd on, for example, Invites, Re-sent invites, Reminders, Results, etc.

✓ Click 'Insert' to register your updates. They will display in the 'non-administrators' section of the page.
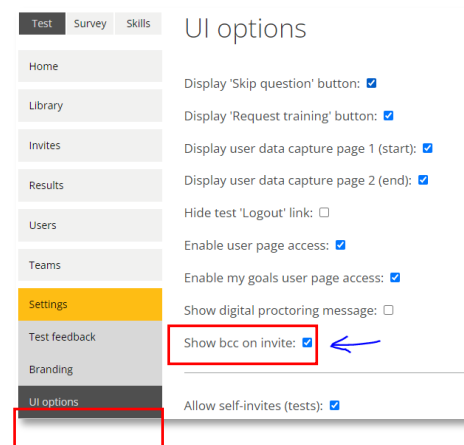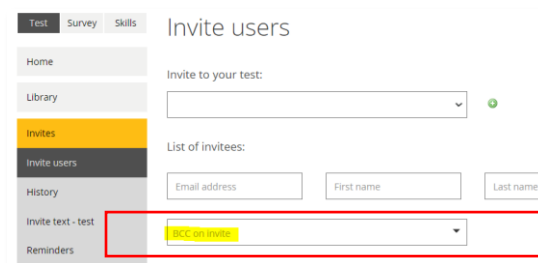
✓ Next, go to Settings > UI options and check the box labelled, 'Show bcc on invite'.

✓ Now, go to the Invites > Invite users page and you'll see a new field displayed on screen called, 'BCC on invite'.
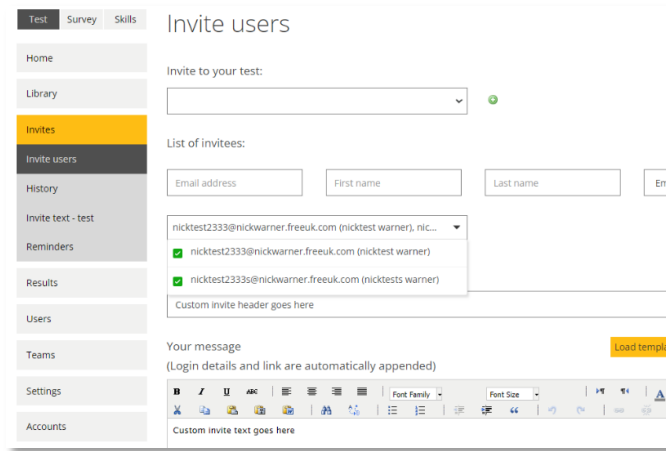
✔ Your contacts (who were added as non-admin email recipients on the Settings > System mail page) will display in the dropdown.

✔ Select one or more contacts using the checkboxes and they will be bcc'd on your invite mail. (Plus, whatever other system mail types you selected on the Settings > System mail page).

Enhancement to Library Editing Workflow

■ We added the question ID and module ID to the summary panel, which displays when you are editing library content (for skills assessments, general surveys, and skills audits).