2023

Monthly Release Notes

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February

Prepared by
Eagle Point Customer Support Team

Eagle Point
Software

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ENHANCEMENTS AND REPAIRS

⌃ Pinnacle Series

Browser Admin

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

⌃ Repairs:

- **Azure AD Synchronization**

  ✓ **Synchronize User's Manager from Active Directory > Users to be deleted when this box is checked**

    o When a customer sets the 'Synchronize user's Manager from Active Directory' checkbox, the Sync with Active Directory summary shows nearly all users will be deleted.
    o Source of bug identified as Microsoft creating a link in their response when we need to pull more records. The addition of managers made the header data so large, that the link for getting the next results wasn't being pulled and API connections maxed out.
    o Dev Team added in extra calls to dispose of finished connections, freeing up the API to continue making calls as needed.
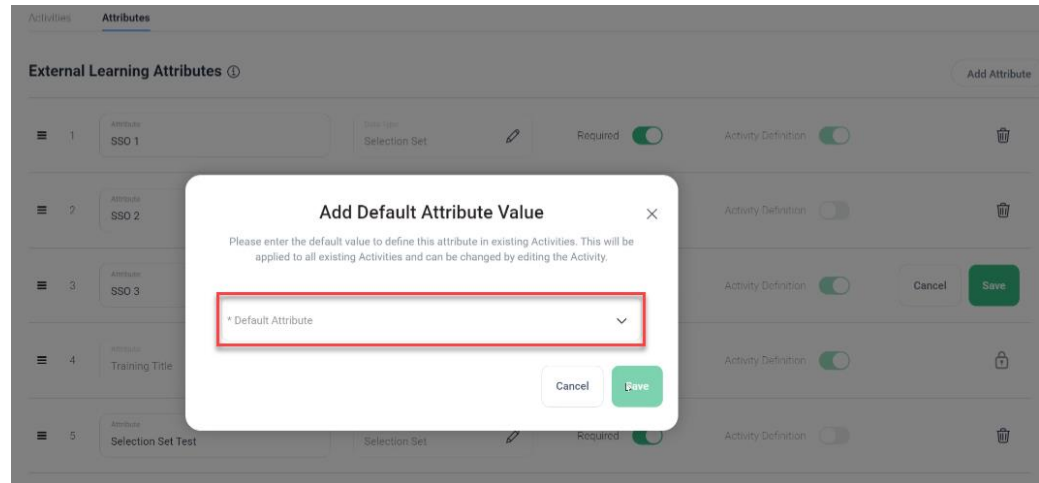
  ✓ **Azure AD Sync - Special Characters**

    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 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.
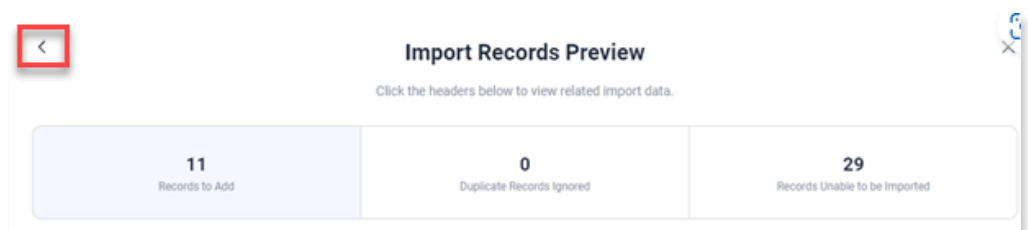
- **External Learning Tracking**

    ✓ **Selection Set Options list does not show the correct list of options in 'Add Default Value' modal**

    - After adding/editing the Selection Set data type options, I am NOT presented with the "Add Default Attribute Value" pop-up.

    ✓ **Mapping attributes are not retained when users back up in the import process.**

    - When mapping attributes during a user import there is an option to preview the imported records. If not satisfied with the preview shown there is an option to select a left-arrow (<) but the mapped attributes are not retained and have to be re-done, at this stage.
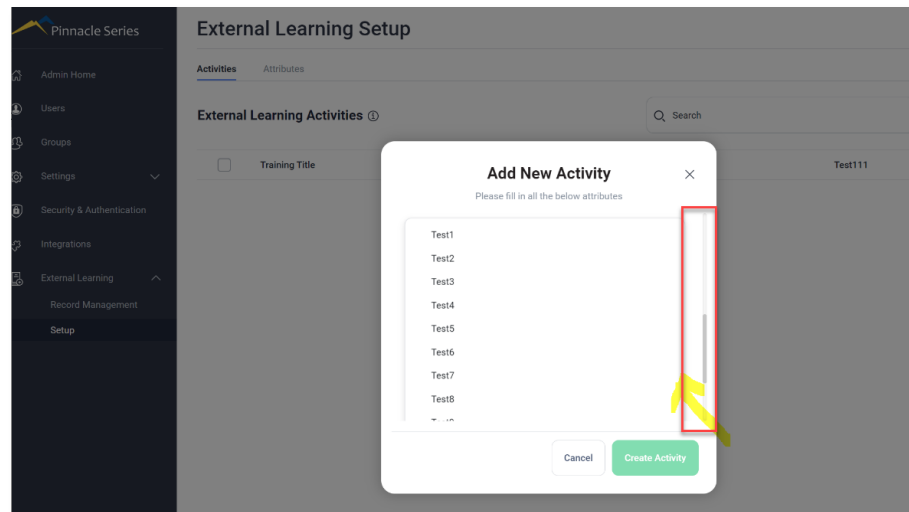

    - ELT - Mapping attributes are now retained when users back up in the import process

✓ **Unable to scroll when viewing long dropdowns during the 'add a new activity' workflow.**

- When adding a new activity under external learning tracking it was reported that a user was unable to scroll when viewing multiple

  training types in activities. The bug was related to the selection set options taking up more than the originally given space. The scrollbar was visible but seemed to scroll through the screen in the background and not on the pop-up.

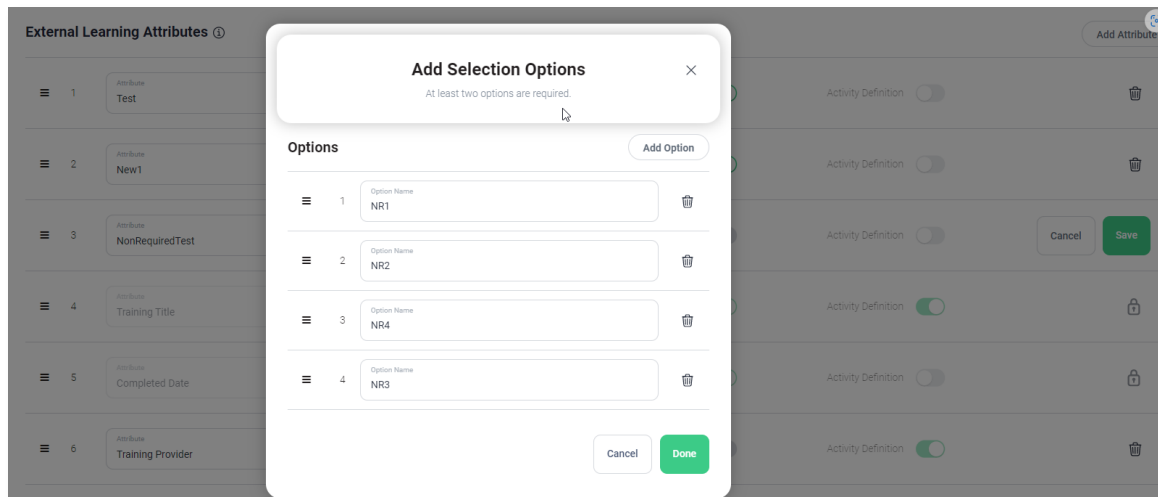- Scrollbar now functions as expected.

✓ **Inconsistent behavior with editing/saving attributes.**

- Bugs were caused by the originalAttrData field not getting cleared after a successful Save.
- Design change implemented during bug fix. Any time a user clicks on the selection set pencil, this will put that attribute in edit mode and you should see the Cancel and Save buttons with that attribute even if no changes are done on the selection set options (the user cancels without changes). The user will have to select the cancel or save on that attribute before moving to another attribute or adding a new one.
- In the following examples, the first one is prior to selecting the selection set pencil.

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o The second is after I selected the selection set pencil for the NonRequiredTest attribute. You can see in the background of the modal, that this attribute has the Cancel and Save options now available.

o The last example is after I leave the add selection options modal.

✓ **Non-Group Owner/Assignor Appearing in 'Add Users' list of approvers**

o A user with 'Assignor' permissions and NOT a Pinnacle Group Owner is appearing in the "Add Users" list when an attempt was made to submit an activity via the web widget.
o Fixed issue with the Assignor list

✓ **Update Logic for Attributes/Activities**

- o Updated the logic of Attributes with Activity Definition toggled ON.
- o Updates to Activities that contain Attributes with Activity Definition toggled ON should **not** retroactively affect/update the values of existing (historical) External Learning Records:
- o "Snapshot in time" when -
  - Creating a Record
  - Retrieving Records
  - (Must apply "fix" existing ELT Record(s))
  - This includes the 'Training Tile' Attribute
- o *'ExternalLearningInsertActivityDefinition .sql'* was created to insert missing activity definition records for all existing external learning records - this will only insert if they are missing.
- o If an external learning activity
  - Contains any type of attribute.
  - The attribute has the 'activity definition' toggled on
  - The attribute was pre-defined by the assignment admin
  - There are existing learning records logged for this activity.
  - When a change is made to the data within the 'activity definition' attribute, previously recorded data for the 'activity definition' attribute remains unchanged.
- o Confirmed that when you now navigate to browser ELT widget and see existing learning record details then the previously recorded data for the 'Activity Definition' Attribute remains intact (unchanged).

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.
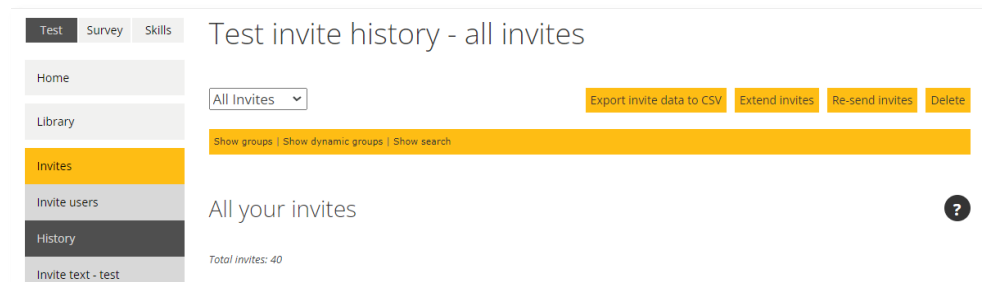
⌃ Repair:

- **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 user's filter in the front end because of the differences with trailing spaces in the comparison.
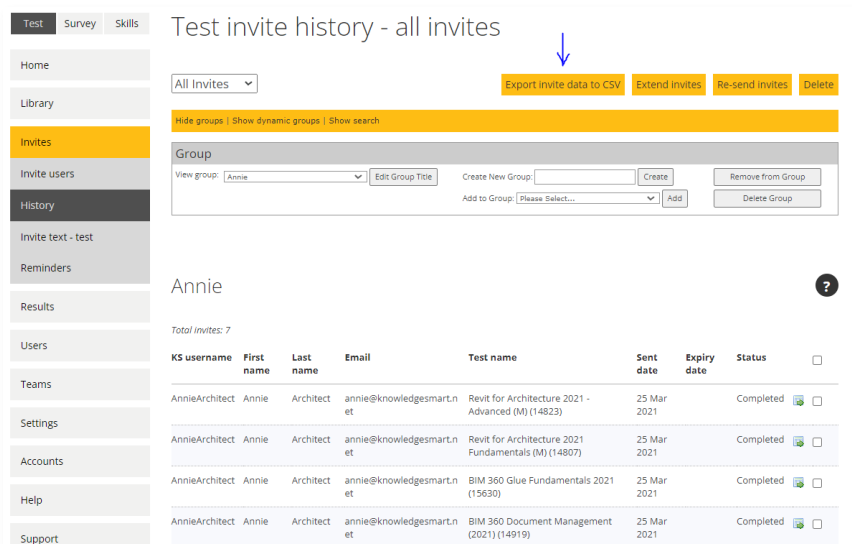
⌃ KnowledgeSmart

⌃ Enhancements to Invites Workflow

✓ We added a 'groups' feature to the Tests > Invites > History page, which allows admins to view and export a sub-set of the Invites data.
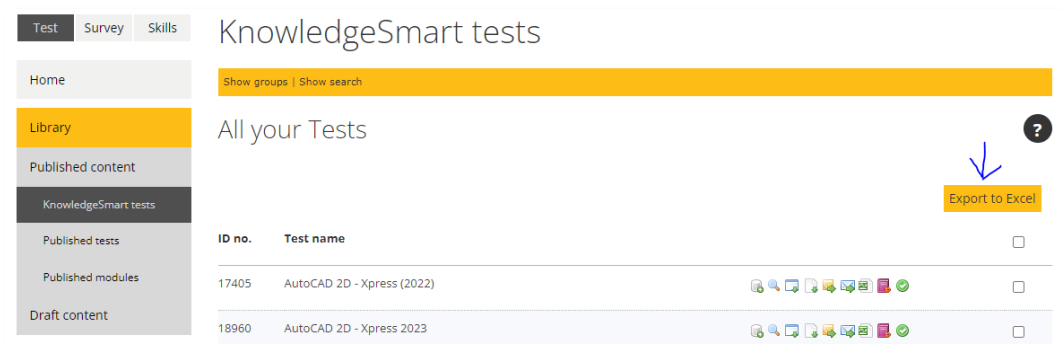

✓ To export a sub-set of your Test Invites data, run a search, capture your search results in a new group, then select the 'Export invite data to CSV' tool. We will shortly be adding the same grouping option to the General surveys and Skills audits Invites pages.

Library Enhancement

✓ We added a new library export feature, so admins can easily export a list of 'Off the Shelf' (OTS), Published and Draft content, across individual or linked accounts.

  o Look for the 'Export to Excel' tool, at the top of all library pages.

  o This feature is available for Skills assessments, General surveys, and Skills audits, on the following dashboard pages:

   ▪ Library > Tests > OTS Tests, Library > Tests > Published Tests, Library > Tests > Draft Tests

   ▪ Library > Surveys > Published Surveys, Library > Surveys > Draft Surveys.

   ▪ Library > Skills > OTS Skills Audits, Library > Skills > Published Skills Audits, Library > Skills > Draft Skills Audits.