

2023

# Monthly Release Notes

- October

Prepared by  
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Eagle Point  
Software

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# ENHANCEMENTS AND REPAIRS

## Pinnacle Series

### Admin Browser – Groups



Grouping users in the Pinnacle Series admin browser streamlines user administration, aligns training with organizational structures, enables customized learning paths, and facilitates efficient communication and tracking. It empowers administrators to manage accounts, content, and notifications effectively, enhancing engagement and personalization while simplifying compliance and support efforts.

## Repairs:

### ✓ **Default Admin Permissions**

- **Observed behavior** – The default permission group for Admins does not have the ‘Assignment Administrator’ or ‘Work Group Administrator’ permissions
- **Expected behavior** - default permission group should have the Assignment Administrator and Work Group Administrator permissions in addition to the current permissions it has:
  - Content Administrator
  - Administrator (User Administration)
  - View Reports
  - Create Work Groups
- Repair implemented just for the default "Administrator" group that gets created with a new tenant.

Permissions	
<b>Assignments and Learning Reporting</b>	
Assignment Administrator ⓘ	<input checked="" type="checkbox"/>
Assignor ⓘ	<input type="checkbox"/>
<b>Content Management</b>	
Content Administrator ⓘ	<input checked="" type="checkbox"/>
Content Publisher ⓘ	<input type="checkbox"/>
Content Author ⓘ	<input type="checkbox"/>
<b>User Administration</b>	
Administrator ⓘ	<input checked="" type="checkbox"/>
View Reports ⓘ	<input checked="" type="checkbox"/>
View Sensitive Information ⓘ	<input type="checkbox"/>
Technical Support Disabled ⓘ	<input type="checkbox"/>
Manage Portal Branding and Customization ⓘ	<input type="checkbox"/>
<b>Work Group Management</b>	
Administer Work Groups ⓘ	<input checked="" type="checkbox"/>
Create Work Groups ⓘ	<input checked="" type="checkbox"/>
Invite External Users into Work Groups ⓘ	<input checked="" type="checkbox"/>

# KnowledgeSmart

## KnowledgeSmart

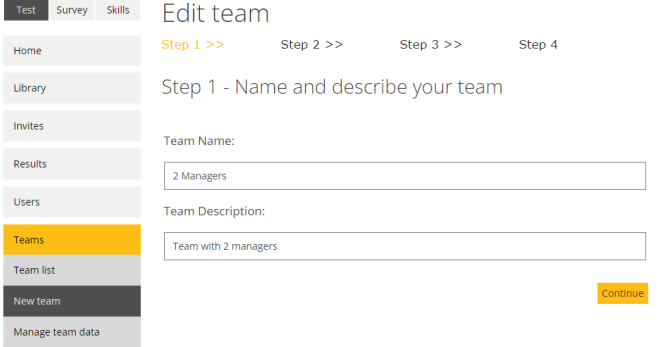
### KnowledgeSmart Enhancements

#### ✓ Teams – Add a Secondary Manager

- KS Teams can now be updated with a 'Primary' Manager and a 'Secondary' Manager.
- Primary Managers can view and edit KS Skills audit data, plus view KS Skills assessment data and KS Survey data (for their Team(s)).
- Secondary Managers can view (but not edit) KS Skills audit data, plus view KS Skills assessment data and KS Survey data (for their Team(s)).

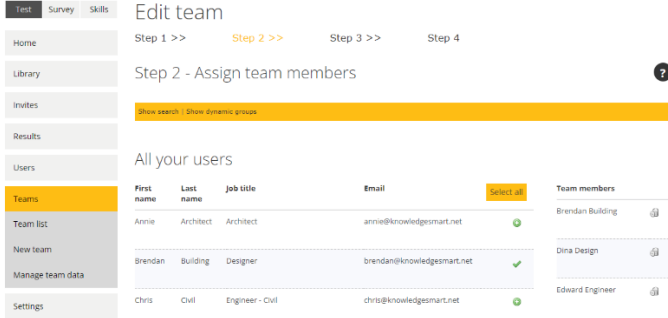
#### ✓ How to add managers to teams

- **Step 1 - Name and describe your team.**



The screenshot shows the 'Edit team' interface. On the left is a navigation menu with options: Home, Library, Invites, Results, Users, Teams (highlighted), Team list, New team, and Manage team data. The main content area is titled 'Edit team' and shows a progress bar with 'Step 1 >>' highlighted. Below the progress bar, the title is 'Step 1 - Name and describe your team'. There are two text input fields: 'Team Name:' with the value '2 Managers' and 'Team Description:' with the value 'Team with 2 managers'. A 'Continue' button is located at the bottom right of the form.

- **Step 2 - Assign your team members.**



The screenshot shows the 'Edit team' interface for Step 2. The progress bar now highlights 'Step 2 >>'. The title is 'Step 2 - Assign team members'. Below the title is a search bar with 'Show search' and 'Show dynamic groups' options. The main content area is titled 'All your users' and displays a table of users. To the right of the table is a 'Team members' section with a list of team members and their roles.

First name	Last name	Job title	Email	Select all	Team members
Annie	Architect	Architect	annie@knowledgesmart.net	<input type="checkbox"/>	Brendan Building
Brendan	Building	Designer	brendan@knowledgesmart.net	<input checked="" type="checkbox"/>	Dima Design
Chris	Civil	Engineer - Civil	chris@knowledgesmart.net	<input type="checkbox"/>	Edward Engineer

○ **Step 3 - Assign your Primary team manager.**

First name	Last name	Job title	Email		Team manager
Fran	Field	Facilities Manager	Fran@knowledgesmart.net	✓	Fran Field
Tina	Manager	Director	manager@knowledgesmart.net	⊕	

○ **Step 4 - Assign your Secondary team manager.**

First name	Last name	Job title	Email		Secondary manager
Fran	Field	Facilities Manager	Fran@knowledgesmart.net	⊕	Tina Manager
Tina	Manager	Director	manager@knowledgesmart.net	✓	

✓ **Viewing Results data on Manager Pages**

- This is the view for a Primary manager...
- Select the 'My Teams' link to view the teams you manage.

Team Name	Team ID	Team Description	Account Name
2 Managers	2965	Team with 2 managers	KS Skills Demo
A Team	17	My A Team	KS Skills Demo

- Click the team name to view a list of team members.

**Team - 2 Managers (ID: 2965)**

Team Members

First name	Last name	Email	Job title	
Brendan	Building	brendan@knowledgesmart.net	Designer	+
Dina	Design	Dina@knowledgesmart.net	Engineer - Aerospace	+
Edward	Engineer	Edward@knowledgesmart.net	Engineer - MEP/HVAC/Building Services	+

User Skills

- Click the '+' icon to view skills for each team member. Primary managers can view and edit Manager ratings values.

**Team - 2 Managers (ID: 2965)**

Team Members

First name	Last name	Email	Job title	
Brendan	Building	brendan@knowledgesmart.net	Designer	+
Dina	Design	Dina@knowledgesmart.net	Engineer - Aerospace	+
Edward	Engineer	Edward@knowledgesmart.net	Engineer - MEP/HVAC/Building Services	+

Save Changes Match All

Skill	Rating (U)	Rating (M)	Diff	Avg
AIR's	2	2	0	2
Analytical Thinking	4	4	0	4
AutoCAD	3	3	0	3
BEP's	3	3	0	3

- Select the 'Team Skills' link to view a consolidated list of skills for all users from teams you manage.

**My Teams**  
Here you can view your teams.

>> Team Skills

First name	Last name	Email	Job title	Team name
Annie	Architect	annie@knowledgesmart.net	Architect	A Team, B Team
Brendan	Building	brendan@knowledgesmart.net	Designer	2 Managers, A Team, B Team
Dina	Design	dina@knowledgesmart.net	Engineer - Aerospace	2 Managers, A Team, B Team
Edward	Engineer	edward@knowledgesmart.net	Engineer - MEP/HVAC/Building Services	2 Managers

- Click the username to view a list of skills. Primary managers can view and edit Manager ratings values.

Sustainable Design	3	3
Teamwork	4	4
Technical Feasibility Studies	2	
Time Management	4	4
Transport	1	1
Utilities on Site	3	
Work Environment	3	
Working with Owners	2	


[Edit Ratings](#)
[View History](#)
[Return to Team Skills](#)




- In addition to Skills ratings data, Primary managers can also view results data for Surveys and results and invite history data for Skills assessments.



- This is the view for a Secondary manager...
  - Select the 'My Teams' link to view the teams you manage.



**Tina Manager**  
KnowledgeSmart profile



### My Teams


Here you can view your teams.

>> Teams I manage

Team Name	Team ID	Team Description	Account Name
2 Managers	2965	Team with 2 managers	KS Skills Demo
B Team	245	My B Description	KS Skills Demo

[Export Teams to CSV](#)

- Click the team name to view a list of team members.



**Tina Manager**  
KnowledgeSmart profile


### Team - 2 Managers (ID: 2965)

Team Members

First name	Last name	Email	Job title	
Brendan	Building	brendan@knowledgesmart.net	Designer	+
Dina	Design	Dina@knowledgesmart.net	Engineer - Aerospace	+
Edward	Engineer	Edward@knowledgesmart.net	Engineer - MEP/HVAC/Building Services	+

User Skills

- Click the '+' icon to view skills for each team member. Secondary managers can view (but not edit) Manager ratings values. (Manager ratings are greyed out).



**Tina Manager**  
KnowledgeSmart profile

- >> My Details
- >> My Achievements
- >> My Goals
- >> My Assessments
- >> My Assessment Scores


### Team - 2 Managers (ID: 2965)

Team Members

First name	Last name	Email	Job title	
Brendan	Building	brendan@knowledgesmart.net	Designer	+
Dina	Design	Dina@knowledgesmart.net	Engineer - Aerospace	+
Edward	Engineer	Edward@knowledgesmart.net	Engineer - MEP/HVAC/Building Services	+

Skill	Rating (U)	Rating (M)	Diff	Avg
AIR's	2	2	0	2
Analytical Thinking	4	4	0	4
AutoCAD	3	3	0	3
BEP's	3	3	0	3
Bluebeam	2	3	1	2.5
CDE's	2	2	0	2
Collaboration	3	4	1	3.5

- Select the 'Team Skills' link to view a consolidated list of skills for all users from teams you manage.



**Tina Manager**  
KnowledgeSmart profile

>> My Details

### My Teams

Here you can view your teams.

>> Team Skills


First name	Last name	Email	Job title	Team name
Annie	Architect	annie@knowledgesmart.net	Architect	A Team, B Team
Brendan	Building	brendan@knowledgesmart.net	Designer	2 Managers, A Team, B Team
Dina	Design	dina@knowledgesmart.net	Engineer - Aerospace	2 Managers, A Team, B Team
Edward	Engineer	edward@knowledgesmart.net	Engineer - MEP/HVAC/Building Services	2 Managers



- Click the username to view a list of skills. Secondary managers can view (but not edit) Manager ratings values. (Manager ratings are greyed out).

Revit Architecture	3	3
Revit MEP	4	4
Revit Structure	3	3
Rhino	1	1
Site Visits	4	4
SketchUp	3	3
Sustainable Design	3	3
Teamwork	3	4
Time Management	4	4
Transport	3	3

Edit Ratings View History Return to Team Skills



- In addition to Skills ratings data, Secondary managers can also view results data for Surveys and results and invite history data for Skills assessments.

**>> My Teams**

- Team Skills**
- Team Surveys**
- Team Assessment Scores**
- Team Assessment Invites**