2023 Monthly Release Notes

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- July

Eagle Point Software



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ENHANCEMENTS AND REPAIRS

Pinnacle Series

Browser Admin

-̈̈́Q́-

The Administration Portal for Pinnacle Series provides a user interface for administrators or users with elevated permissions to manage and control various aspects of Pinnacle Series. Administrators can perform administrative tasks, configure settings and integrations and access tools and features that are not available to regular users.

🔨 Repairs:

- Browser > Self Enrollment KS Assessment > Enroll in training button is not assigning any courses.
- When self-enrolling in a KnowledgeSmart assessment via a Learning Path, then attempting to self-enroll in the training afterward via the trophy icon on the home screen, no learning was assigned. The loading button was spinning for a few seconds after selecting the 'Enroll in Training' button, but nothing was assigned. This logic has now been tidied up.



✓ AD Sync log cleanup

- Added auto process for AD Sync log cleanup where log_date is older than 90 days from the current date.
- An automated process that will run behind the scenes to help keep Azure Sync Log files cleaned up. We will be deleting records that are older than 90 days. This new process will run every 12 hours as part of the application and will check for records that qualify and will remove the database records and will remove the Azure blob storage record.



KnowledgeSmart

KnowledgeSmart

KnowledgeSmart Enhancements

\checkmark New Batch Upload Tool for Legacy Skills Data

- We added a new batch upload tool, which enables customers to capture legacy user skills and manager skills ratings. So, if a firm has previously sent a skills survey to their team, and has access to the survey content and results data, they can now easily upload it into their KS admin dashboard, for detailed results analysis alongside existing KS data.
- There are 3 steps to the new process:
 - 1. First, utilize the user upload tool to add the relevant users to their KS admin portal.

Import user data	
Browse for your .csv file here and click 'Upload':	
UPLOAD	1

2. Next, use the skills batch edit tool to upload legacy skills survey questions. Create new skills modules, as appropriate, and, finally, create a new skills audit survey.

Create skills audit
Step 1 - Name and describe your skills audit
Name:
Description:
6
Continue



3. Last, use the 'Batch skills export/upload' template to capture your legacy skills ratings data.

Draft skills a	udits		All Linked Accounts 👻
Show groups Show search			
All your Skills Au	dits		9
ID no. Skills audit r 92 Architecture 89 Revit Archite	ame Skills 📿 cture 📿	다. 또 당 은 한 등 를 상 다. 또 당 한 은 한 등 를 상 다. 또 당 한 한 한 등 Batch skills export/1	pelete
Test Survey Skills Home	Batch Skills	Audit Export	
Library	Please select the users y	ou would like export for skills audit	: Revit Architecture
Published content	O Export users filtered b	ov team	
KnowledgeSmart skills audits Published skills audits	O Export users filtered b	y dynamic group	
Published modules			
Draft content	Export all users	5	
Invites	Export All Users		

SkillsAuditName	QuestionI	QuestionName	ShortDesc	QuestionT	TrainingTa	CategoryT	UserName	UserFirstN	UserLastN	UserJobTit	UserStatus	UserData	AccountNam	IsManager	UserRatinga	nagerRating
Revit Architecture	124085	RAC-Copy/Monit	Copy/Mon	As part of	Copy/Mor	Revit Archi	TomCruise	Tom	Cruise		Employee	Bath	Skills matrix	True	4	4
Revit Architecture	124085	RAC-Copy/Monit	Copy/Mon	As part of	Copy/Mor	Revit Archi	MatrixTwo	Matrix	Two		Employee		Skills matrix	False	3	4
Revit Architecture	124085	RAC-Copy/Monit	Copy/Mon	As part of	Copy/Mor	Revit Archi	JohannBad	Johann	Bach	VP-Level R	Employee		Skills matrix	True	4	3
Revit Architecture	124085	RAC-Copy/Monit	Copy/Mon	As part of	Copy/Mor	Revit Archi	RoryVance	Rory	Vance		Employee	Bath	Skills matrix	True	3	4
Revit Architecture	124085	RAC-Copy/Monit	Copy/Mon	As part of	Copy/Mor	Revit Archi	PabloPicas	Pablo	Picasso	Project Ma	Employee		Skills matrix	False	2	2
Revit Architecture	124086	RAC-Worksharin	Workshari	You have b	Workshari	Revit Archi	TomCruise	Tom	Cruise		Employee	Bath	Skills matrix	True	3	3

4. Go to the Skills > Results > Batch upload page and browse for your skills ratings file. Use the 'Upload' tool to import your legacy skills data.

Test Survey Skills	Batch upload
Home	Select the target skills audit:
Library	Architecture Skills
Invites	Browse for vour file here and click 'Upload'.
Results	UPFOAD
Data	
User skills	
Skills search	
Batch upload	



5. Your skills data will display in the Skills > Results area of your admin dashboard.

Test Survey Ski	user Skills - Mat	trix One			
Home					
Library	skill	User rating	Manager rating	Difference	Average
Invites	Attaching walls	2	3	1	2.5
Results	Building pads	2	3	1	2.5
Dett.	Ceilings	2	3	1	2.5
Data	Changing element type	2	3	1	2.5
User skills	Checking families	2	3	1	2.5
Skills search	Color schemes	2	3	1	2.5
Batch upload	Compound walls	2	3	1	2.5
Users	Copy/Monitor	2	3	1	2.5

\checkmark We added a new bulk delete option for the KS Teams page

Test Survey Skills	Teams				
Home	Show search				
Library	All your teams				9
Invites				Delete	selected Teams
Results	Team name	Team ID	Manager		
Users	A Team	17	Tina Manager		D D D
Teams	BTeam	245	Tina Manager	o	
Team list	C Team	246	Tina Manager	D	_
New team	Copy of Team Zebra	2662	Tina Manager	O	1
and the second sec	EMAIL TEST TEAM	2598		0	2b <i>a</i>

✓ We updated the search logic on Edit test step 2 (Assign modules to your test) to include module ID.

Edit	test			
Step 2	2 - Assign modules to your	test		?
Search N	lodules		Your modules	
107604 ID no.	Module name	Search Assign modules	RAC - 22I - User Interface (K) RAC - 22I - View Properties (K) RAC - 22I - System Families (K) RAC - 22I - Families (K) RAC - 22I - Rooms and Areas	00 1 0011 0011 0011 0011 0011
107604	RAC-21I-ProjectBrowser/Views	Continue	(K) RAC - 22I - Sheets (K) RAC - 22I - Doors (K) RAC - 22I - Links (K) RAC - 22I - Worksets (K)	011 011 011



✓ We updated the search logic on Edit test module Step 2 (Assign questions to your module) to include question ID.

Edit t	est module				
Step 2	- Assign questions to y	our modules		?	
Search Qu	uestions		Your questions		
727441			RAC-Phasing-	-	Ļ
			TempConstruction		
All your Q	uestions	*	RAC-Phasing-PhaseFilter	di 1 -	ţ
		Search	RAC-Phasing-PhaseName	61	ţ
			RAC-SharedCoordinates-	di 1 -	t
			AlignGrid		
ID no.	Question name	Assign questions	RAC-SharedLocations-	61	t
727441	RAC-DesignOptions-Roof	0	CityState		
			RAC-SharedCoordinates-	61	t
			MeasureAngle		
		Continue	RAC-TrueNorth-BasePoint	d 1	ţ

✓ We have made the following changes to the logic on the KS custom test invite templates page:

- Removed the 'Load template' button template now loads automatically when the dropdown is changed.
- Removed the 'Reset page view' and added an 'Undo' button at the bottom to simplify the existing process.
- Added an 'Update template' button at the top this allows admins to edit existing templates (once selected) and save changes.
- o Updated text to clarify 'Save as new template'.

Invite te>	kt - test 🔹 👔
Show linked accounts	Hide templates
Save options	
Saved templates	
Template name:	Example invite 1 VDelete template Update template
Save current invite as a	new template
Template name:	Save as new template
Email Subject Line Custom invite head Your message (Lo	e
B I U AN	: = = = = Foot Family Foot Size H 11 A . 107 . X, X'
х 🗈 🕰 🛛	ិ
Custom invite text g	joes here



✓ We updated the general survey UI and skills audit UI to improve spacing and layout of question text, including:

- o Numbers in boxes
- o Line breaks preserved from the original question text
- o Horizontal line between questions.

KNOWLEDGE SMART
Survey name Employee 360 Review Employee 360 Review Employee 360 Review desc
Please enter the full name of the person you are reviewing e.g. Adam Smith 1. eggs 2. ham
Please type your answer here
Is this employee's communication presented in a clear, concise and organized manner?

 \checkmark We published a new master Benchmark data report for our 'BIG 5' library titles:

- o AutoCAD
- o Civil 3D
- o Revit Architecture
- o Revit MEP
- o Revit Structure

REVIT ARCHITECTURE FUNDAMENTALS

VARIANCES IN OUR OVERALL BENCHMARK DATA





✓ The Global Benchmark table within the KnowledgeSmart Test Consolidated Data Export has been enhanced with a wider range of test names and now reflects a range of scores and elapsed times from 2019-2023.

B		\checkmark : $\times \checkmark f_{x}$	TestName									
4	А		В	с	D	E F	G	н	I J	к	L	м
1	TestID	TestName		 AvgScore A 	vgTime							
2	10370	3ds Max Fundam	2↓ Sort A to Z	7	57							
3	13471	3ds Max Fundam	Z Sort 7 to A	5	14							
4	16488	3ds Max Fundam	A0 0202 000	4	17							
5	17666	3ds Max Fundam	Sort by Color	> 5	17							
6	18955	3ds Max Fundam	Sheet View	> 4	15							
7	1205	Adobe InDesign	Clear Filter From "TertName"	4	45							
8	1441	Adobe Photosho		2	48							
9	16449	Advance Steel Fi		> 3	11							
10	16832	Advance Steel Fi	Text <u>Filters</u>	> 8	12							
11	18956	Advance Steel Fi	Search	a)	12							
12	9277	ARCHICAD Funda	CZ (Calcat All)	~ 3	50							
13	10376	AutoCAD 2D - Xp	2 2 de May Eurodamentals 2010	1	49							
14	12942	AutoCAD 2D - Xp	3ds Max Fundamentals 2019	' 4	52							
15	15284	AutoCAD 2D - Xp	→ 3ds Max Fundamentals 2021	7	48							
16	17405	AutoCAD 2D - Xp	☑ 3ds Max Fundamentals 2022	D	46							
17	18960	AutoCAD 2D - Xp	- 🗹 3ds Max Fundamentals 2023	3	49							
18	10378	AutoCAD 2D for (7	72							
19	12080	AutoCAD 2D for (Adobe Photoshop Occasional	7	72							
20	15278	AutoCAD 2D for (Advance Steel Fundamentals 202	21 9	74							
21	17404	AutoCAD 2D for (Advance Steel Fundamentals 202	2 0	73							
22	18961	AutoCAD 2D for (7	74							
23	10377	AutoCAD 2D Fun			74							
24	12079	AutoCAD 2D Fun	OK	Cancel 1	72							
25	15283	AutoCAD 2D Fund	amentais (2022)	÷2	68							
26	17303	AutoCAD 2D Fund	damentals (2022)	62	71							
27	18919	AutoCAD 2D Fund	damentals (2023)	63	69							
28	10384	AutoCAD Civil 3D	2019 - Road Design (Adv)	53	52							
29	10380	AutoCAD Civil 3D	2019 Fundamentals	68	66							
30	10381	AutoCAD Civil 3D	2019 Fundamentals	68	66							
81	10382	AutoCAD Civil 3D	2019 Fundamentals	68	66							
32	10383	AutoCAD Civil 3D	2019 Fundamentals	68	66							
33	12087	AutoCAD Civil 3D	2020 - Road Design (Adv)	53	52							
84	12089	AutoCAD Civil 3D	2020 Fundamentals	68	63							
85	12090	AutoCAD Civil 3D	2020 Fundamentals	68	63							
36	12091	AutoCAD Civil 3D	2020 Fundamentals	68	63							
37	12092	AutoCAD Civil 3D	2020 Fundamentals	68	63					_		
3/	12092	. Skipped Ques	zuzu Fundamentais tions Groups Users Static Group	s Users Dynamic	Group	s Results Static	Groups Re	sults Dynamic	KS Benchm	ark Data	(+)	