PRM Release Notes

LOGICBAY CORPORATION

PERFORMANCE CENTER

RELEASE 13.0.1

JAN 25, 2021

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INTRODUCTION

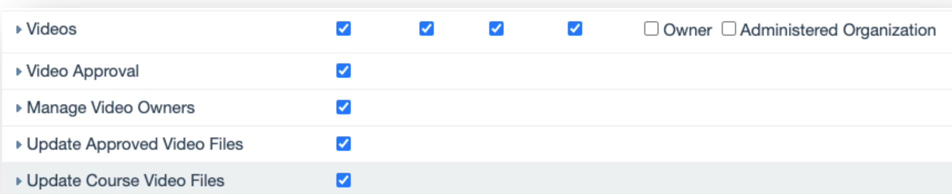
LogicBay is pleased to announce the release of version 13.0.1 of the Performance Center™ product. The Performance Center is the core of the LogicBay Partner Relationship Management (PRM) offering and continues to grow based on customer input and feature requests. This Release contains several bug fixes and improvements. This build also includes hot patches that have taken place since the 12.1 release.

WHAT'S NEW IN PRM 13.0.1

VIDEO LIBRARY

A **Video Library** Page is in the **Available Pages** list when creating a new content object.

System Role settings, found under the Content Management category, determine a user's access to video management features. Note that users do not need to have any of these items checked in order to simply view and play videos in the Video Library.



For the purposes of this document, it is assumed the reader has access to create, edit and manage videos.

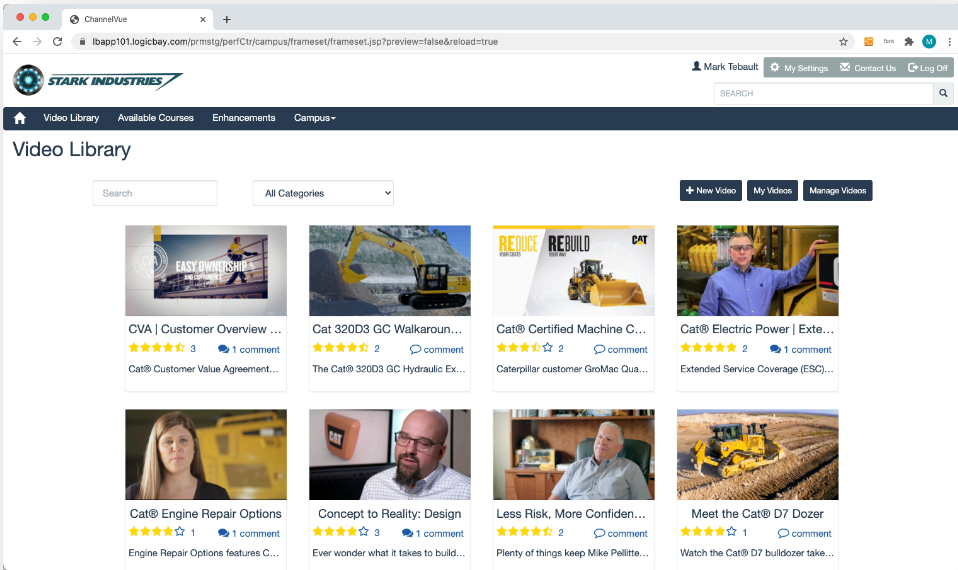
- Users with the Video Approval setting checked in their system role will receive emails when new videos are ready for review
- Users with the Manage Video Owners setting checked will have access to the Owner and Group Owner settings in the course editor. It is recommended that this not be checked for standard video contributors.
- The two Update settings protect against users updating a video file that has already been approved or is being used in a course. These permissions should be granted selectively

These settings also control what navigation buttons users see on the Video Library page.

- All users have access to the Video Library
- Only users with Video create access can see the New Video button
- Users who can create videos also see the My Videos button
- Video approvers who are not restricted to managing only their own videos can see the Manage Video button

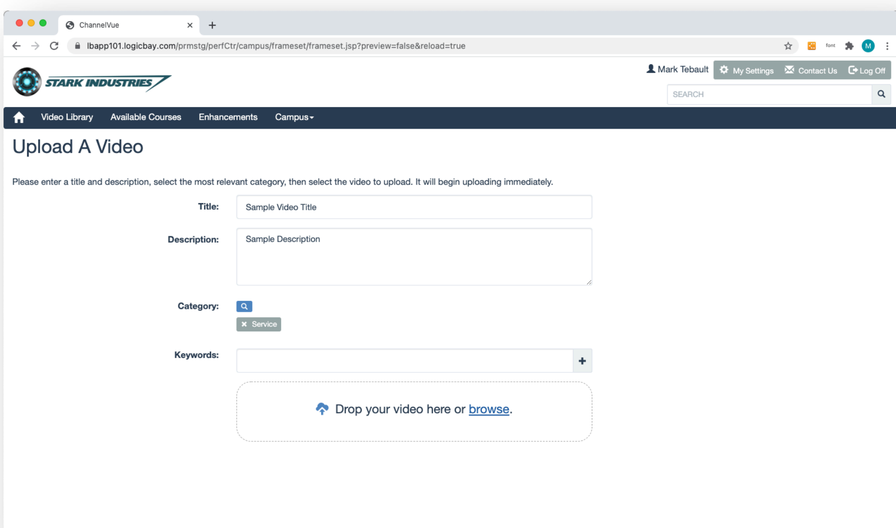
Video editing and deleting controls are accessed via the video player and are managed by the Videos setting.

Please contact the Help Desk to configure system roles for Videos.



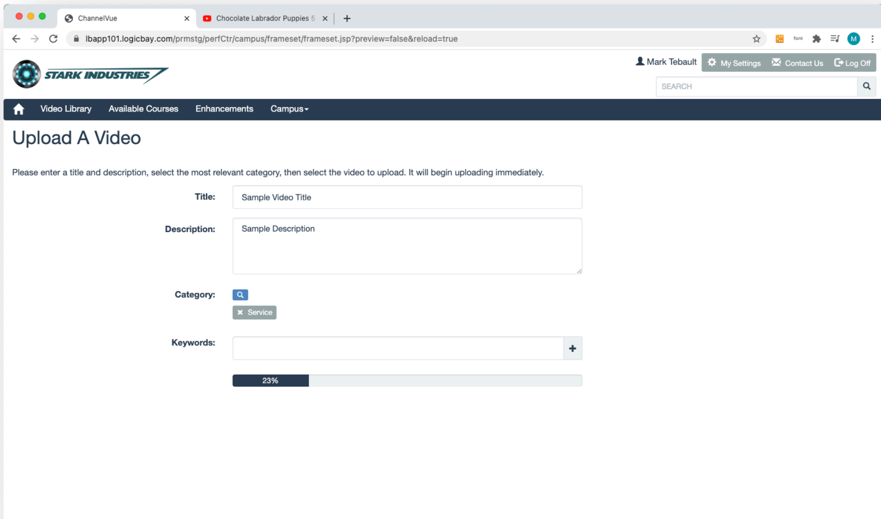
UPLOADING VIDEOS

Click the **New Video** button to begin the process of uploading a new video. The Title, Description and Category are required fields. ***These fields must be populated before a video file can be selected.***

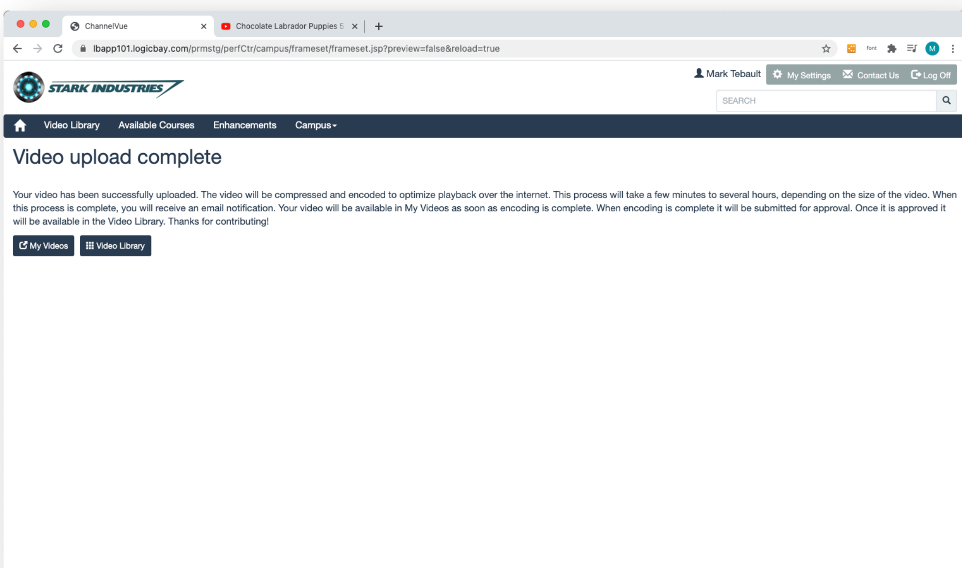


A video file can be selected by clicking the **Browse** link, or by drag-n-drop from the local file system. Once a file has been selected, it is uploaded to the media server. A progress bar provides upload status.

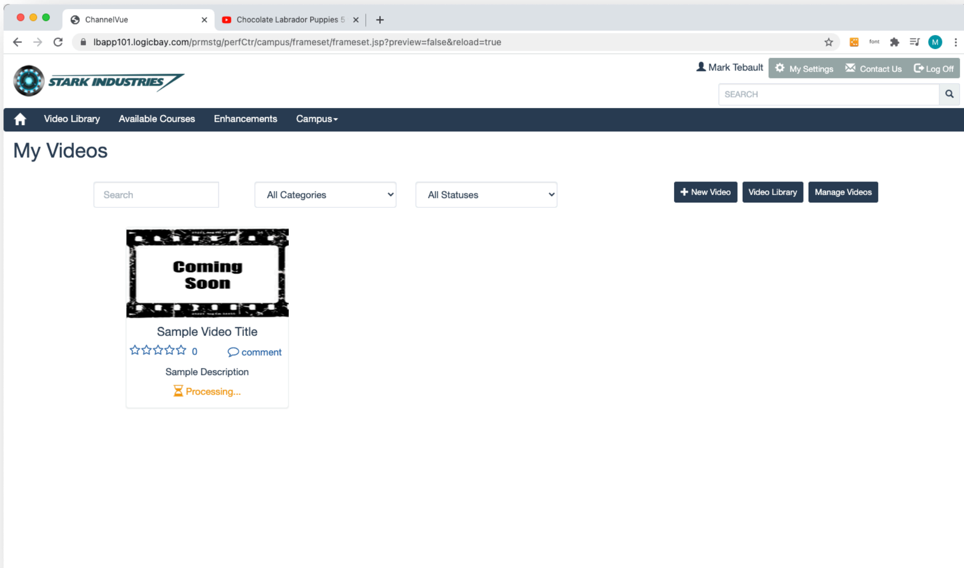
Caution: Do not navigate away from the page or close your browser window while the video is uploading. Be patient, large videos may take time to upload.



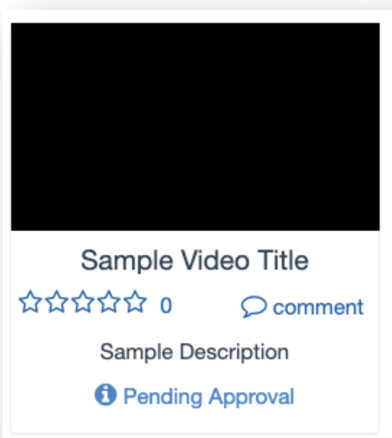
A **Video upload complete** screen is shown when the video is uploaded. This page informs the user that the video is being optimized for playback over the internet. The process may take several minutes, to several hours, depending on the size of the video and the queue of videos being optimized. The user can select to view the user's videos (My Videos) or the video list (Video Library).

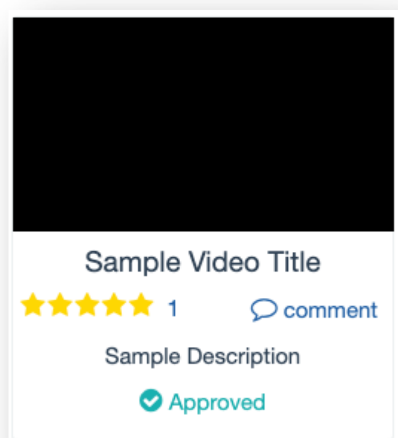


Clicking the **My Videos** button allows the user to see all videos the user has uploaded. A **Coming Soon thumbnail** is shown for all videos that are processing. The user receives an email when the video optimization has completed.



If approvals are enabled, the video is available for the user who uploaded it; however, it is not available to other users until it has been approved. The status of the video is displayed below the description. Approvers receive an email when a video is pending approval. Once approved, the video status is changed to Approved. The user receives an email when a video status is changed.

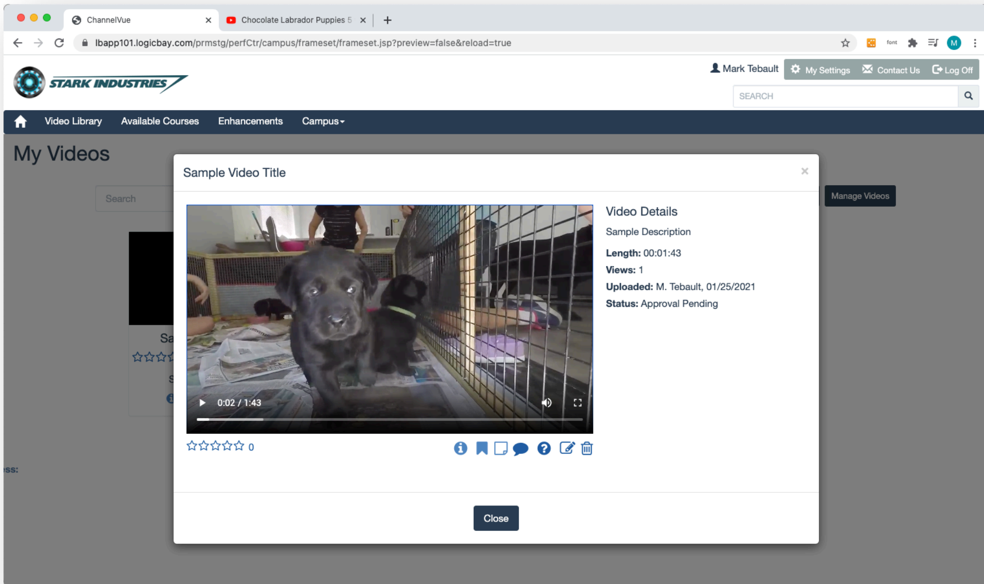




Attributes, such as description, keywords etc., can be edited while a video is processing. Once the video has completed processing it can be played, and the preferred video thumbnail can be chosen in the editor.

VIDEO PLAYBACK

The video plays in a player. Several icons appear at the bottom of the video – depending on the user's system role settings. These icons provide access to features.



VIDEO PLAYER ICONS

 Displays information about the video. Length, Views, Uploaded by and Status

 Allows the user to add bookmarks to save and link to specific locations in the video

 Allows the user to save notes about the video

 Allows the user to comment, or reply to comments, about the video

 Allows the user to review and approve the video

 Allows the user to edit the video

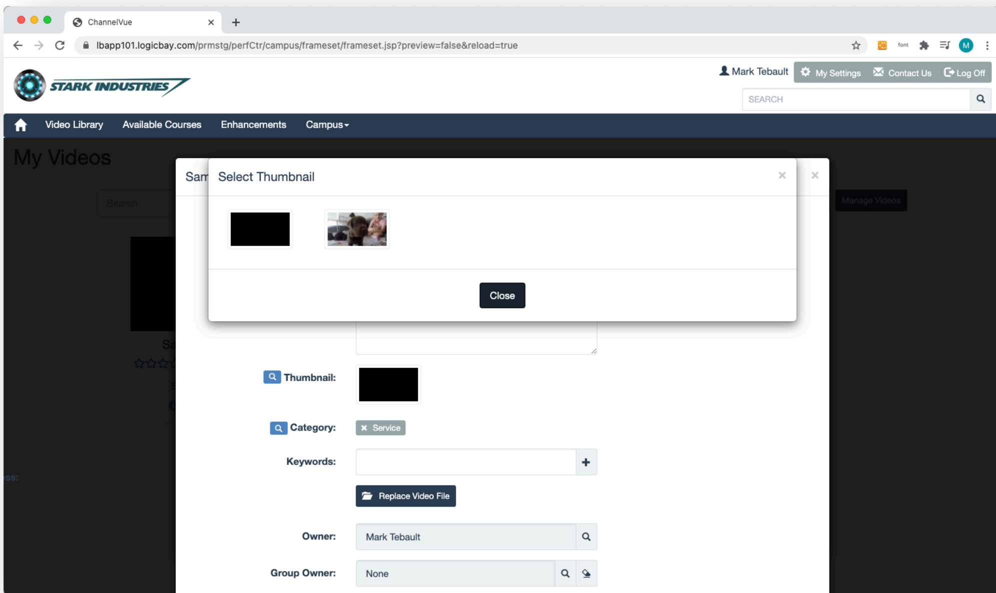
 Allows the user to delete the video

VIDEO CONTROLS

Hovering over the video exposes several controls for Play, Pause, Sound and Full-Screen. Clicking the  icon plays the video in full screen. Pressing the Esc key returns the video to normal size. These are standard controls found on video sites like YouTube and Vimeo.

EDITING A VIDEO

After a video has been optimized, additional edit features become available. Thumbnail images are captured once for every minute of the video. This allows the user to select the best thumbnail image to represent the video.



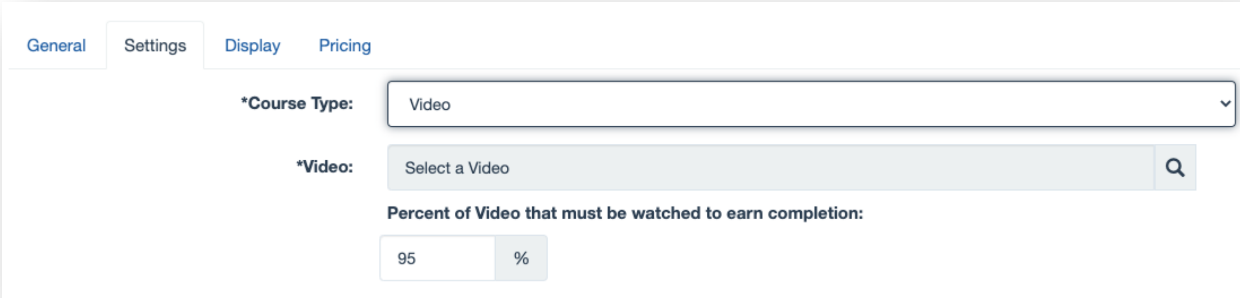
Owner, Group Owner and other properties are also exposed when editing an existing video.

It is possible to replace a video by clicking the **Replace Video File** button.

Caution: Replacing a video file will impact stored bookmarks, user progress and other video specific information. Users who have started but not completed a video course, will continue with the previous video for the remainder of that course session.

CREATING A VIDEO COURSE

A Course can be created using a video from the library as content. Create a new Course, then select Video as the type of course on the settings Tab. Click the Search icon to select an approved video from the video catalog.



By default, a user must watch 95% of a video to get credit for the course. The value of 95% is used to reduce the chance of a user thinking they watched all of the video when in fact they did not. However, this can be set to any value.

Completion is tracked in 5 second increments. Therefore, a user cannot skip to the end of a video and receive credit for watching the entire video.

If a user had previously watched a video before launching the course, the user will receive credit for the amount of the video already watched. This pertains only to the first time the user takes the course.

For example, if Bob watches 100% of a video in the video library and then launches a course that uses the same video, Bob will receive credit for watching 100% of the video simply by launching the course.

UPDATED ADMINISTRATION

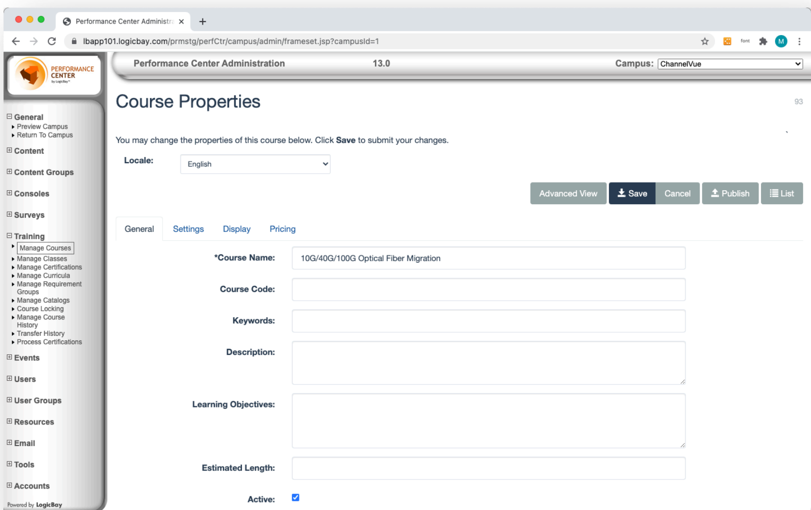
Many of the administration pages have been updated to use a mobile first responsive HTML 5 architecture. In the following screens, it is assumed the reader has permission to access the pages. If the reader does not have permission, the page views may differ from this document.

SIMPLE AND ADVANCED MODES

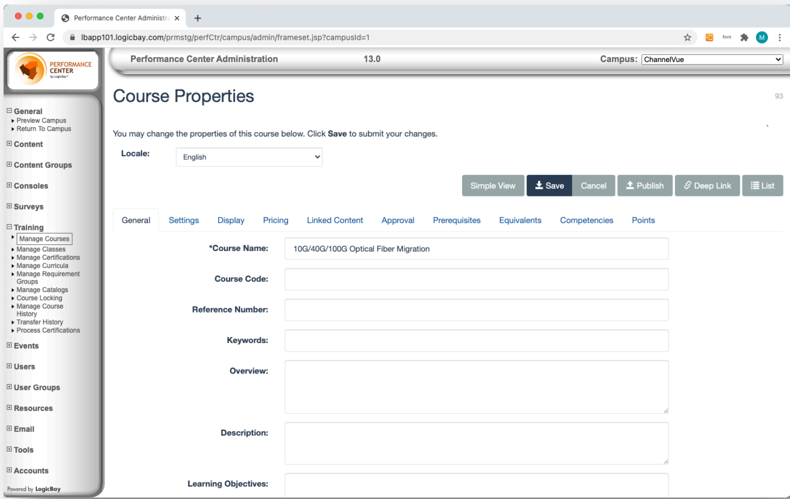
The **course**, **class**, **certification**, and **curricula** properties pages now have two modes:

- Simple View – only displays the most often used properties
- Advanced View – displays all properties

These modes are toggled with an **Advanced View** and **Simple View** Buttons.



In **Advanced Mode**, all available properties are shown.

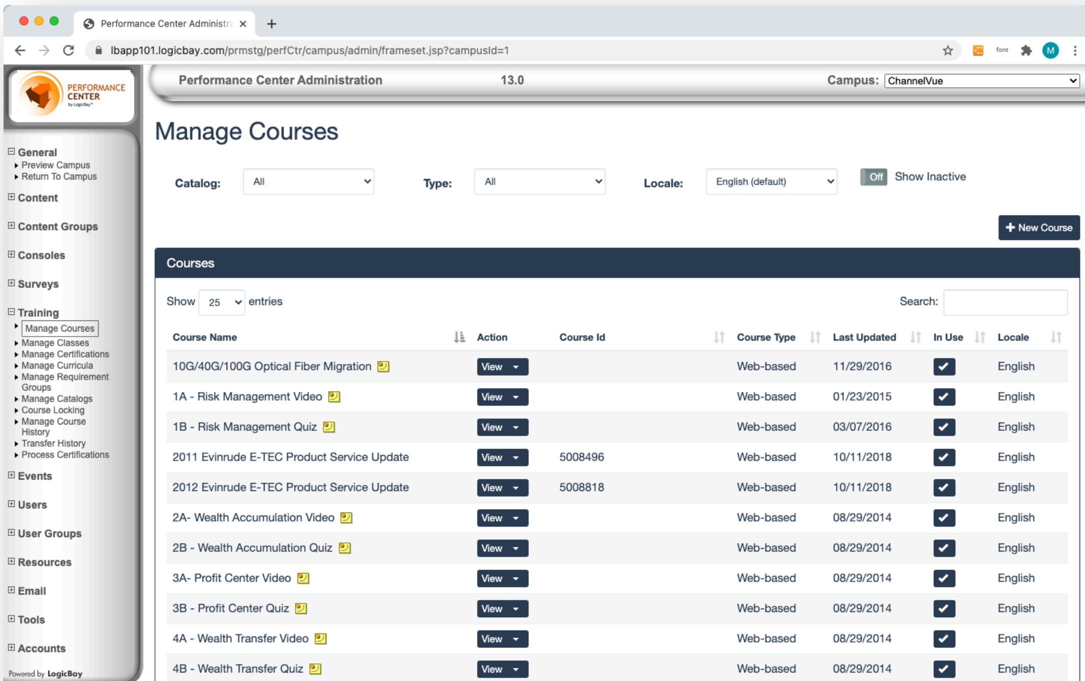


The **Simple View** button returns the view to Simple Mode.

New System Role settings have been added to determine who has access to the Advanced view of the editors. If not granted, the user will just see the simple view. If the user has access to the advanced view it will default to the simple view, but the various editors will remember which version of the editor was last used and retain that view the next time the editor is accessed.

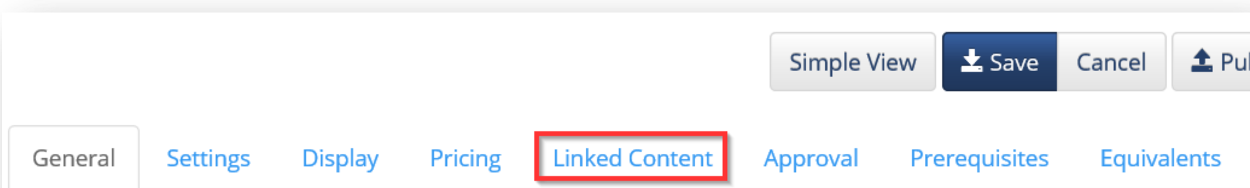
MANAGE COURSES

The course list renders into a data table. The course list can be filtered by Catalog, Type, Locale and Keyword Search. Click the **View** action button to view or edit course properties. Click the **New Course** button to create a new course.



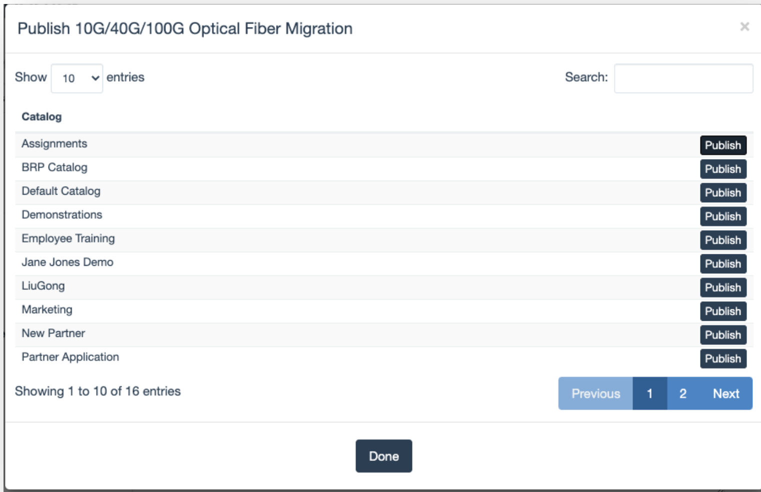
LINKED CONTENT - COURSES

Prior to 13.x attachments could be added to **courses** as assets under the **Assets** tab. The tab is now called **Linked Content**. Linked Content can be found in the advanced view of course details.



PUBLISH COURSES

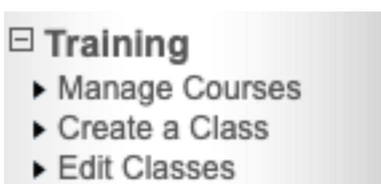
The former Map-To editor has been replaced by a **Publish** feature. The **Publish** button allows the administrator to publish the Course to one or more Catalogs.

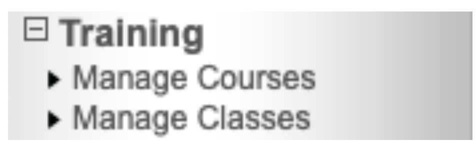


Click the **Publish** button to publish the course in the Catalog. Click the **Unpublish** button to remove the course from the catalog.

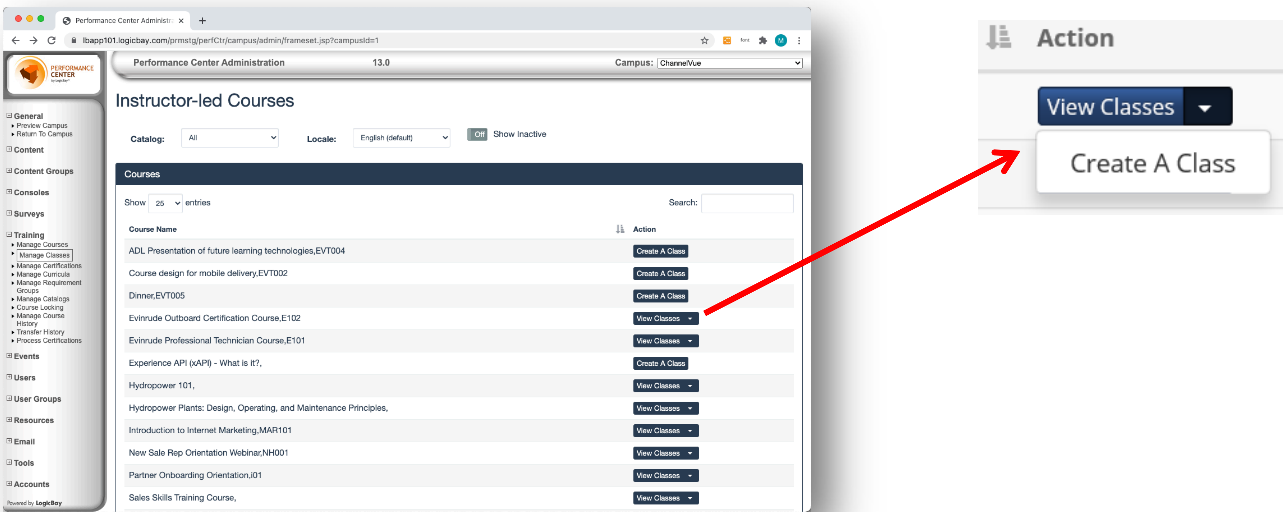
CLASS PROPERTIES

In the Admin, the former **Create a Class** and **Edit Class** menu items have been replaced with a **Manage Classes** menu.



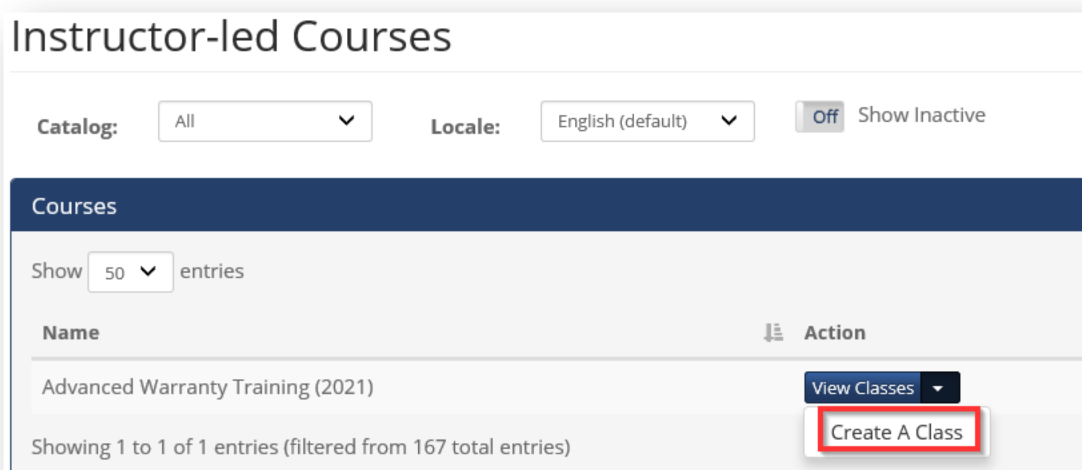


The Manage Classes menu renders a list of all Instructor-Led Courses. The Action button allows a user to create a new class or view a list of existing classes associated with the course.



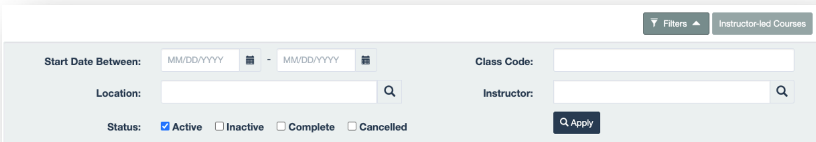
CREATE CLASSES

To create a class, use the filter search bar to narrow your course list to the one you want. From there, use the dropdown menu to access the **Create a Class** option.

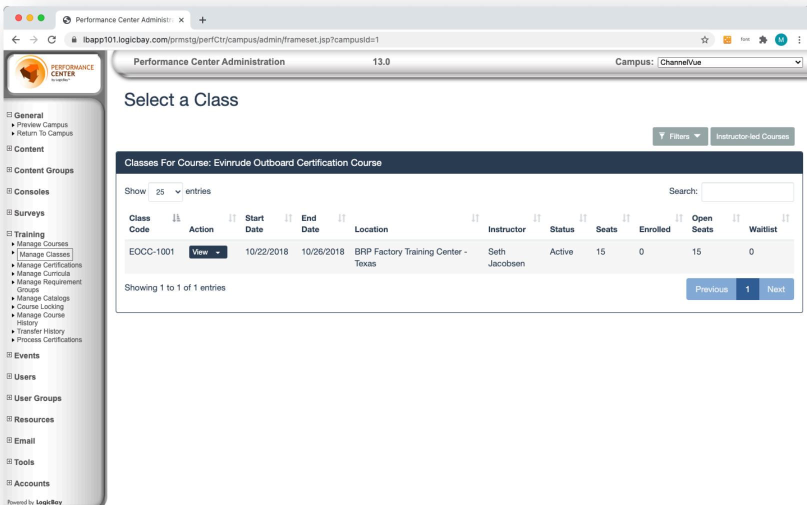


VIEW / MANAGE CLASSES

When the **View Classes** button is selected, a list of classes is displayed for the course. The default view shows active classes. The **Filter** button allows the administrator to change the filter parameters.



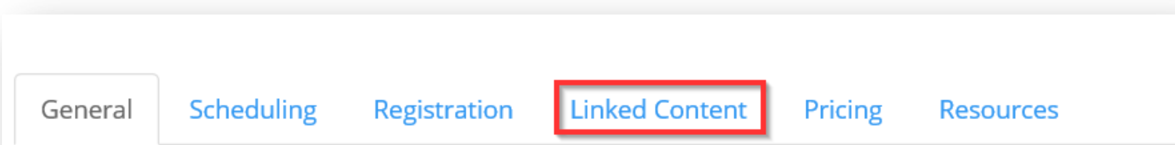
Clicking the View action button displays the Class editor.



Depending on the user's permission, the Action button sub-menu allows the administrator to copy the selected class. The properties displayed on this page are exactly as in previous releases.

LINKED CONTENT - CLASSES

Prior to 13.x attachments could be added to **classes** as assets under the **Assets** tab. The tab is now called **Linked Content**.

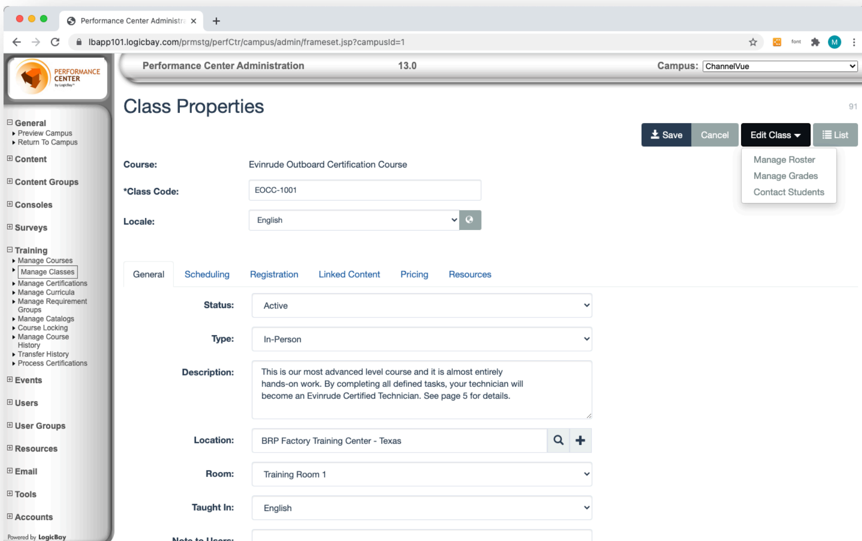


Under Linked Content, there are two types of content.

- Class Resources – Select existing content or create new content to be associated with this class. These resources, such as a syllabus or study materials, will be available to students to view/download.
- Instructor Resources – Select existing content or create new content to be associated with this class. These resources, such as class notes and presentations, will be available to instructors and administrators only.

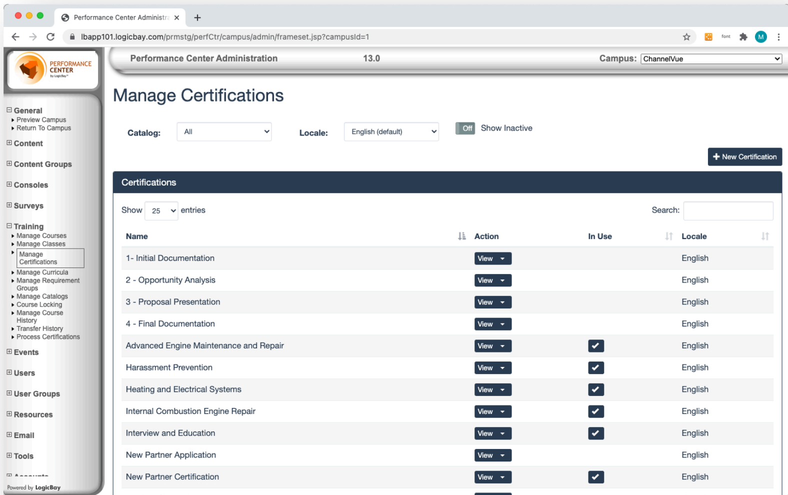
MANAGE ROSTER, GRADES AND CONTACT STUDENTS

Manage Roster, **Manage Grades** and **Contact Students** views are available from the **Edit Class** button located at the top of the Class Properties page.

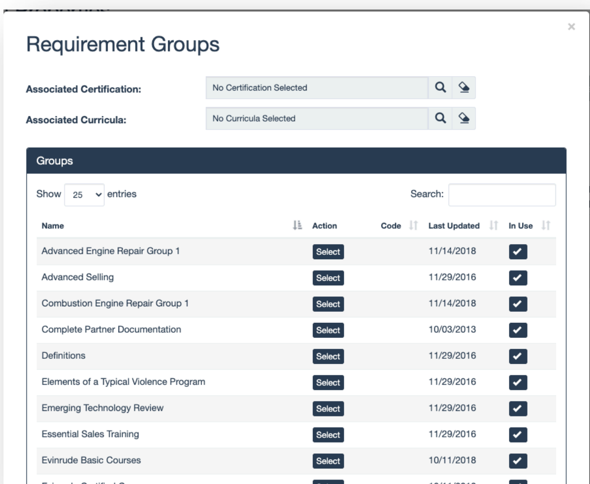


MANAGE CERTIFICATIONS

Similar to Courses and Classes, Certifications and Curricula have been updated. Click the View action menu button to view/edit the Certification, disable it, or publish it.



When editing a Certification or Curriculum, selecting the requirement groups is the same as in previous versions.



OTHER ADMIN PAGES

The following admin pages have also been updated. Functionally these pages are the same as in previous releases.

- Manage Catalogs
- Course Locking
- Manage Locations
- Manage Email Templates
- Manage Email Distribution Lists
- Manage Accounts
- Manage Pricing Models

BIRTHDATE

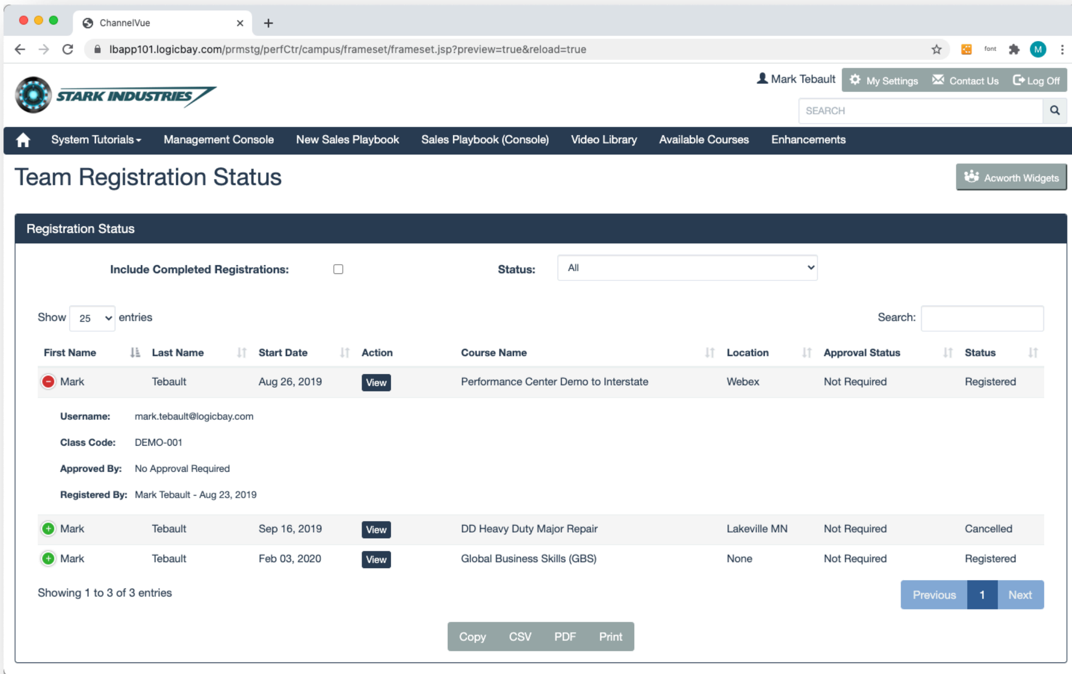
A birthdate field has been added to the user profile. This field is hidden by default; however, it can be made visible and required. The birthdate can be used to create a unique person identifier by concatenating the user's name and birthdate. This unique key can be used to help prevent duplicate users.

When enabled, a user cannot be created if another user in the database has the same last name and birthdate. A system role configuration allows top-level administrators the ability to override this restriction.

Please contact the Help Desk if you would like to enable this feature.

TEAM REGISTRATION STATUS

A manager can view the registration status for their entire team.

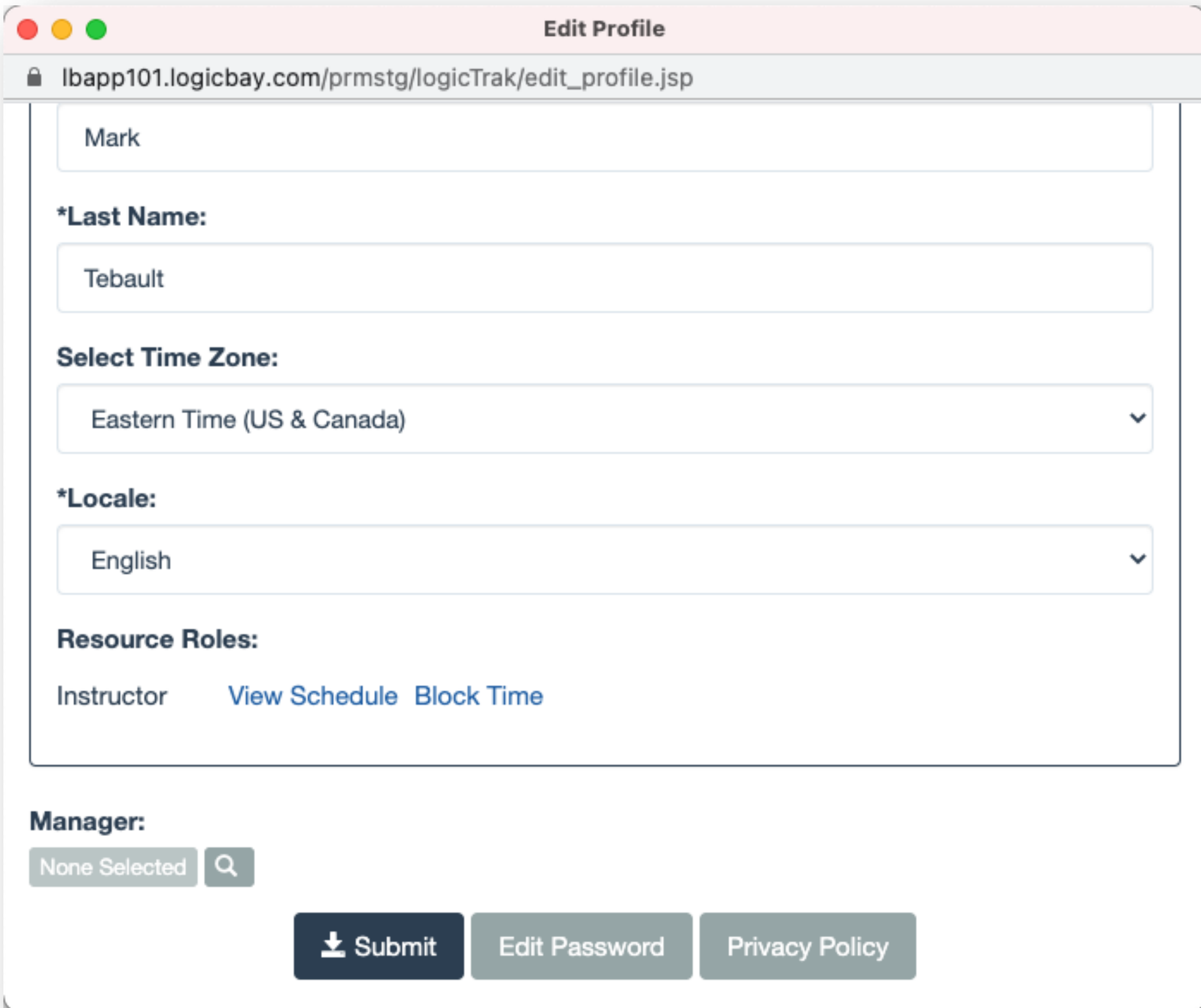


Team Registration Status is available as a new Page in the content repository. Optional configuration allows an individual learner view, or team view of this page.

Caution: This page may not render large teams. It is designed for managers with relatively small teams. Top-level administrators such as campus admins, regional admins, etc. May not be able to use this view

RESOURCE ROLES ADDED TO USER PROFILE

If a user is a **Person Resource**, such as Instructor or Translator, the person's Resource Roles can be exposed in the user profile. When exposed, the user can view the resource schedule or block time on their schedule.



This option is disabled by default. Please contact the Help Desk if you would like to enable this feature.

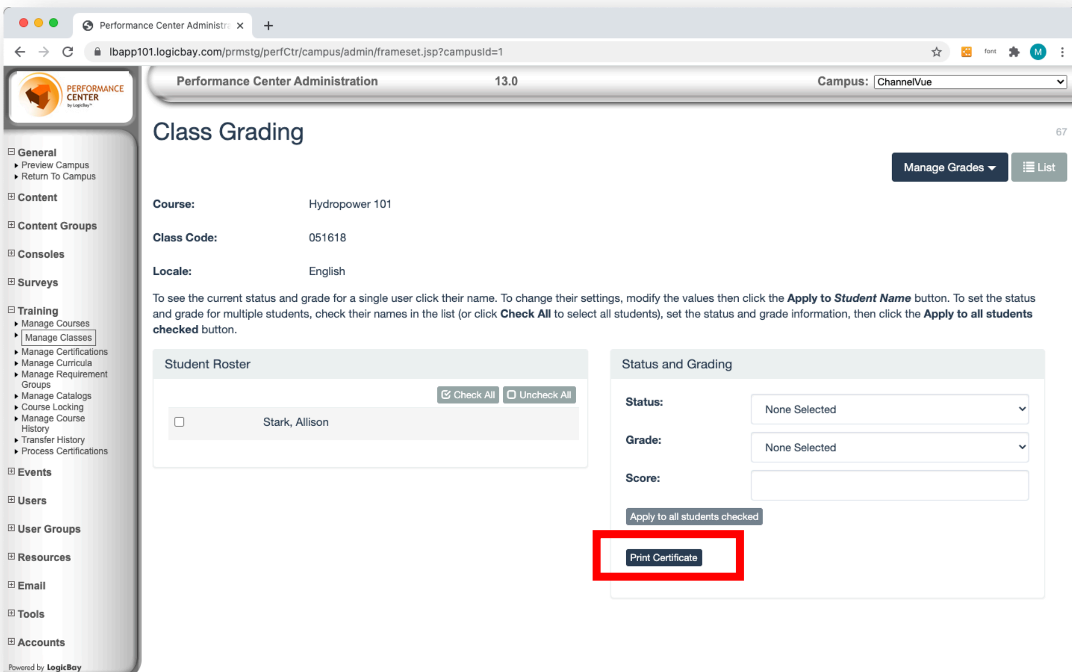
HIDE INSTRUCTOR INFORMATION IN CLASS DETAILS

A new configuration option is available to hide Instructor information from Class Details.

Please contact the Help Desk if you would like to enable this feature.

PRINT CERTIFICATES FOR CLASS ROSTER

A new **Print Certificates** button is available on the class grading page. This allows an administrator the ability to print certificates for every user on the roster regardless of the user's completion status.



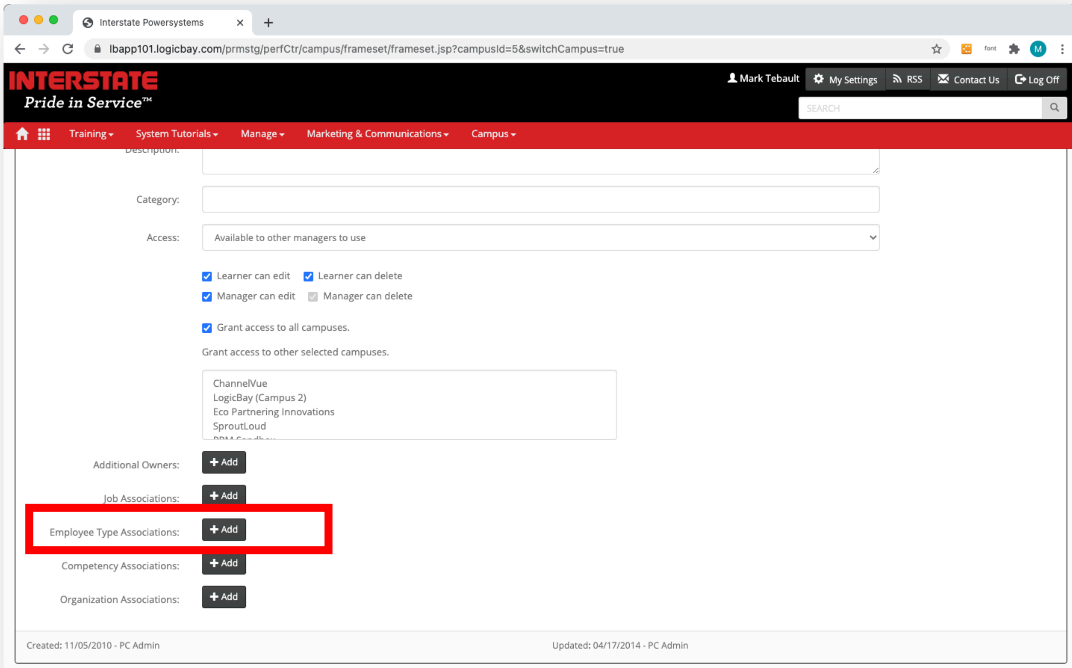
RESTRICT CLASS SEAT CAPACITY

A new configuration option is available to prevent class administrators from changing the maximum number of students allowed in a class. The maximum seat limit is set on the Course and cannot be overridden on the class level.

This option is disabled by default. Please contact the Help Desk if you would like to enable this feature.

EMPLOYEE TYPE GOAL MAPPING

A new System Role setting allows administrator's the ability to auto-assign goal templates to users based on the user's employee type setting. This feature requires the employee types to be bound to a specific known list of values.



This option is disabled by default. Please contact the Help Desk if you would like to enable this feature.

LEAD STATUS EMAIL NOTIFICATIONS

When a Lead is won or lost, the lead owner, the manager and organization administrators are notified via email. The email notifications can be enabled or disabled in the configuration settings.

This option is disabled by default. Please contact the Help Desk if you would like to enable this feature.