



PRM Release Notes

LOGICBAY CORPORATION

PERFORMANCE CENTER

RELEASE 13.0.1

JAN 25, 2021

TABLE OF CONTENTS

Introduction.....	3
What's New in PRM 13.0.1	3
Video Library	3
Uploading Videos	4
Video Playback	7
Editing a Video.....	8
Creating a Video Course.....	8
Updated Administration	10
Simple and Advanced Modes	10
Manage Courses	12
Linked Content - Courses.....	12
Class Properties	13
Create Classes.....	14
Linked Content - Classes.....	15
Manage Certifications	17
Other Admin Pages.....	18
Birthdate	18
Team Registration Status.....	19
Resource Roles added to User Profile	20
Hide Instructor Information in Class Details	21
Print Certificates for Class Roster.....	21
Restrict Class Seat Capacity	21
Employee Type Goal Mapping	22
Lead Status Email Notifications.....	22

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.

» Videos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Owner	<input type="checkbox"/> Administered Organization
» Video Approval	<input checked="" type="checkbox"/>					
» Manage Video Owners	<input checked="" type="checkbox"/>					
» Update Approved Video Files	<input checked="" type="checkbox"/>					
» Update Course Video Files	<input checked="" type="checkbox"/>					

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

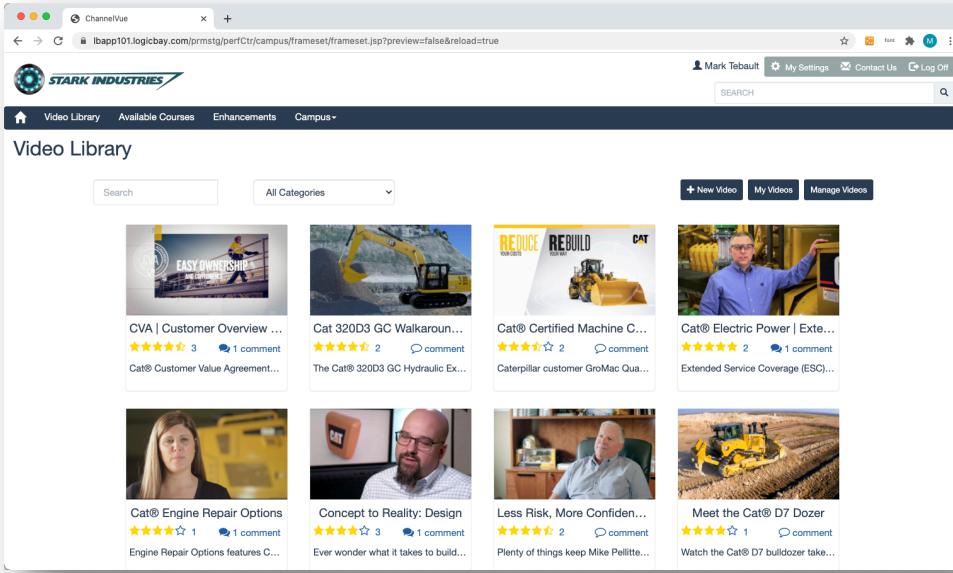
- Users with the Video Approval setting checked in their system role will receive emails when new videos are ready for review
- Users with the Manage Video Owners setting checked will have access to the Owner and Group Owner settings in the course editor. It is recommended that this not be checked for 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.

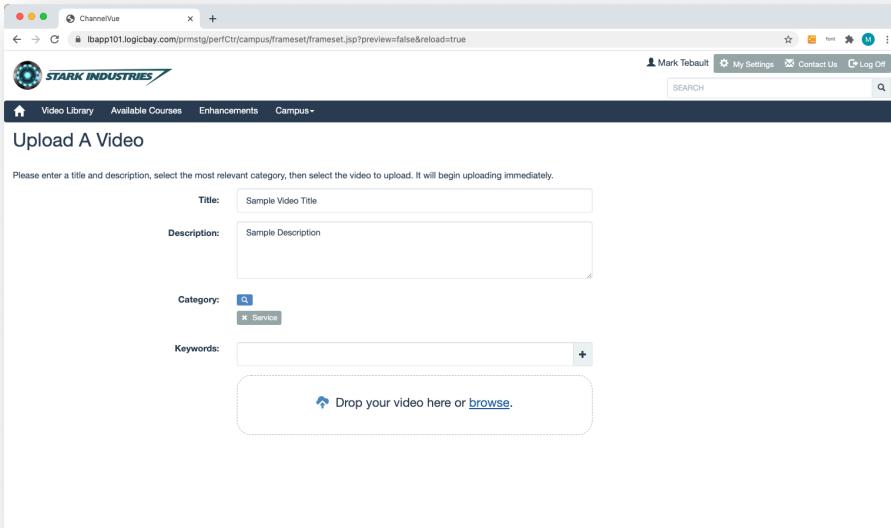
Please contact the Help Desk to configure system roles for Videos.



The screenshot shows the LogicBay Video Library interface. At the top, there is a search bar and a dropdown menu for 'All Categories'. Below that, there are several video thumbnails arranged in a grid. Each thumbnail includes a title, a small image, a rating (e.g., 4.5 stars), and a comment count. The videos are categorized under 'Video Library' and include titles like 'CVA | Customer Overview ...', 'Cat 320D3 GC Walkaroun...', 'Cat® Certified Machine C...', 'Cat® Electric Power | Ext...', 'Cat® Engine Repair Options', 'Concept to Reality: Design', 'Less Risk, More Confidence...', and 'Meet the Cat® D7 Dozer'.

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.***

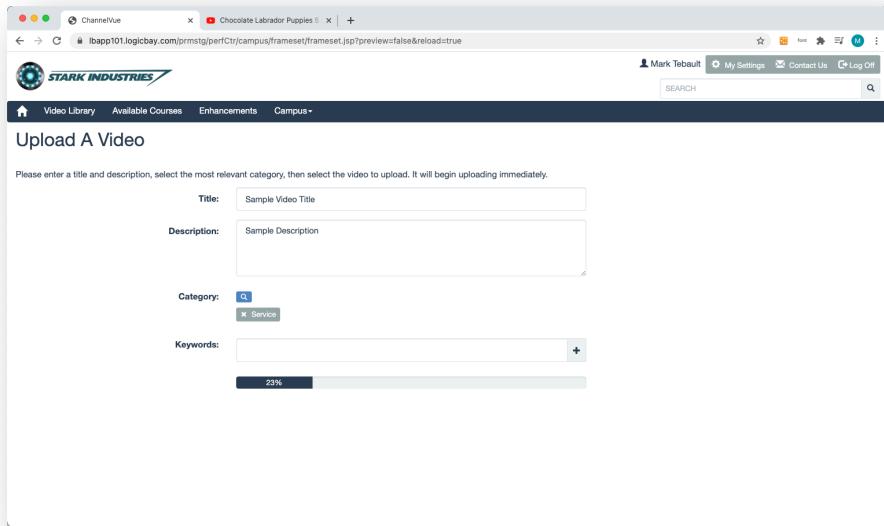


The screenshot shows the 'Upload A Video' form. It includes fields for 'Title' (Sample Video Title), 'Description' (Sample Description), 'Category' (a dropdown menu with 'Service' selected), and 'Keywords'. Below these fields is a large text area with a placeholder 'Drop your video here or [browse](#)'. The form is part of the LogicBay interface, with the 'Video Library' tab selected in the navigation bar.

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.



ChannelVue Chocolate Labrador Puppies

ibapp101.logicbay.com/prmstg/perfCtr/campus/frameset/jsp?preview=false&reload=true

Mark Tebault My Settings Contact Us Log Off

SEARCH

STARK INDUSTRIES

Video Library Available Courses Enhancements Campus

Upload A Video

Please enter a title and description, select the most relevant category, then select the video to upload. It will begin uploading immediately.

Title: Sample Video Title

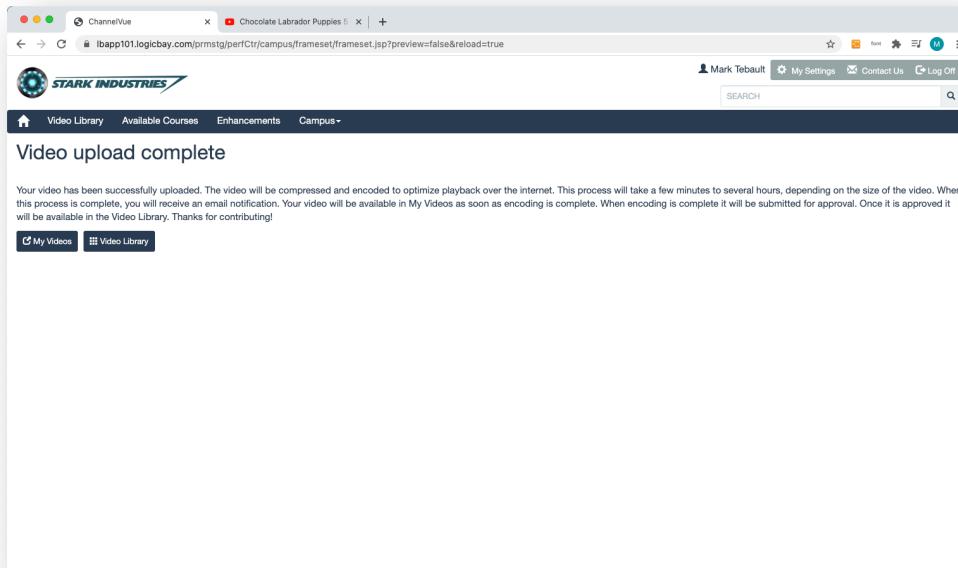
Description: Sample Description

Category: Service

Keywords:

23%

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).



ChannelVue Chocolate Labrador Puppies

ibapp101.logicbay.com/prmstg/perfCtr/campus/frameset/jsp?preview=false&reload=true

Mark Tebault My Settings Contact Us Log Off

SEARCH

STARK INDUSTRIES

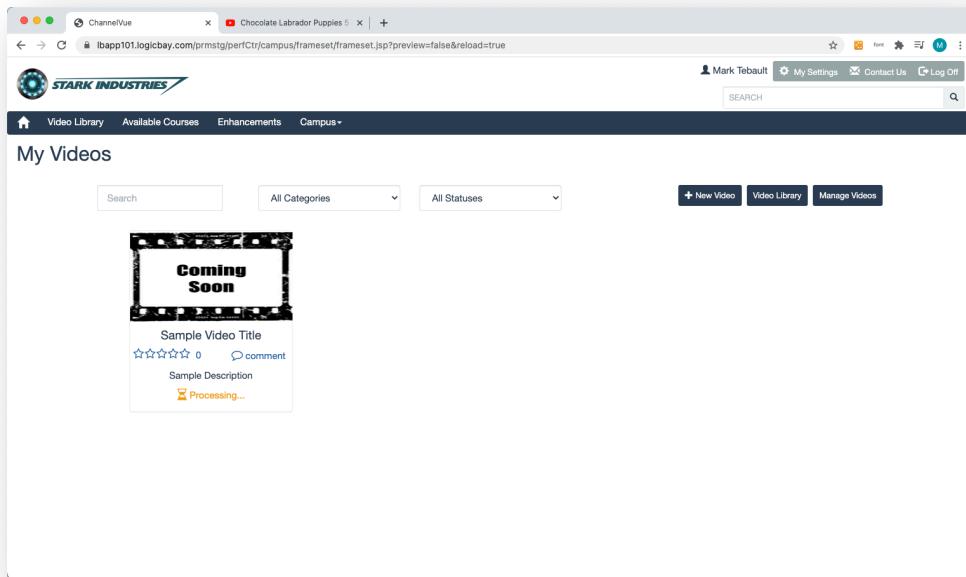
Video Library Available Courses Enhancements Campus

Video upload complete

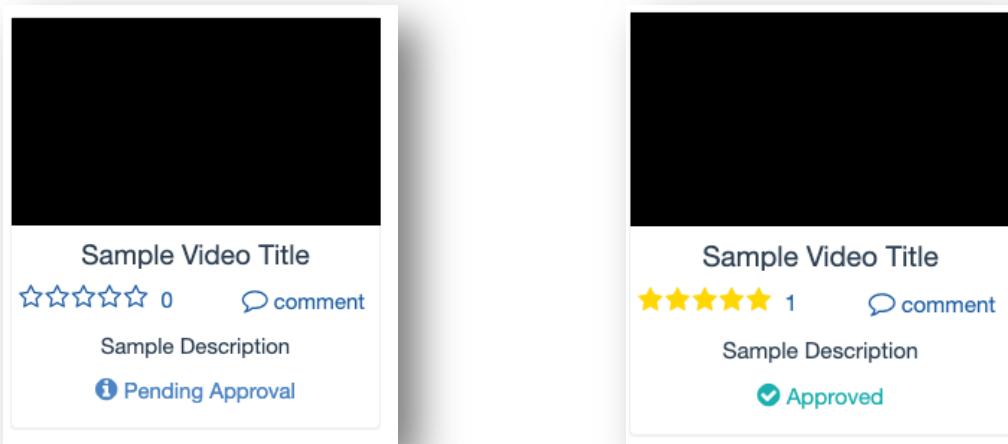
Your video has been successfully uploaded. The video will be compressed and encoded to optimize playback over the internet. This process will take a few minutes to several hours, depending on the size of the video. When this process is complete, you will receive an email notification. Your video will be available in My Videos as soon as encoding is complete. When encoding is complete it will be submitted for approval. Once it is approved it will be available in the Video Library. Thanks for contributing!

[My Videos](#) [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.



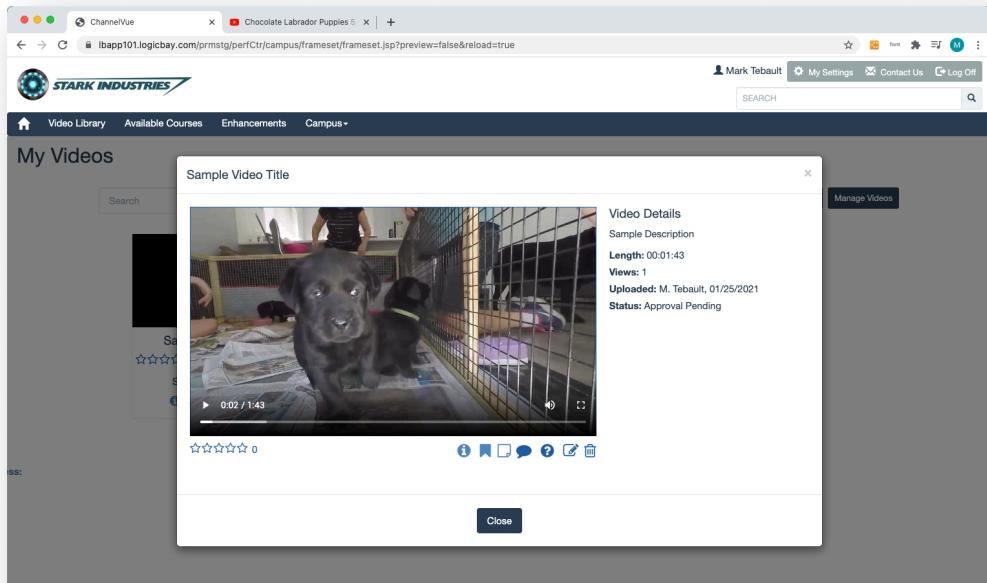
If approvals are enabled, the video is available for the user who uploaded it; however, it is not available to other users until it has been approved. The status of the video is displayed below the description. Approvers receive an email when a video is pending approval. Once approved, the video status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



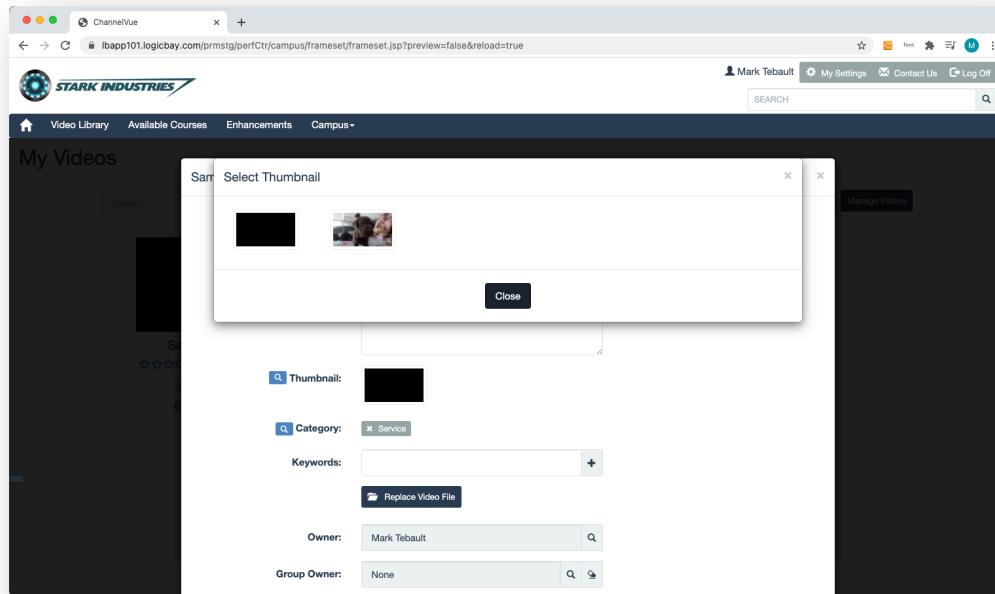
Allows the user to delete the video

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.

General Settings Display Pricing

***Course Type:** ▼

***Video:** 🔍

Percent of Video that must be watched to earn completion:

%

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

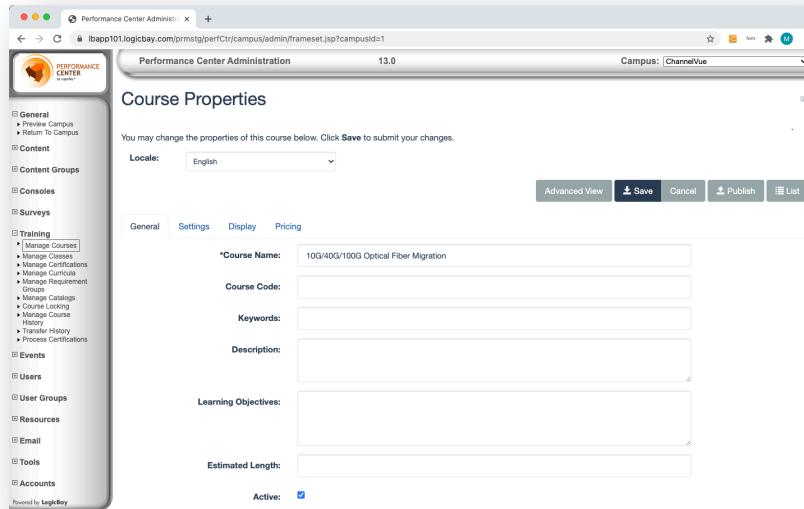
Many of the administration pages have been updated to use a mobile first responsive HTML 5 architecture. In the following screens, it is assumed the reader has permission to access the pages. If the reader does not have permission, the page views may differ from this document.

SIMPLE AND ADVANCED MODES

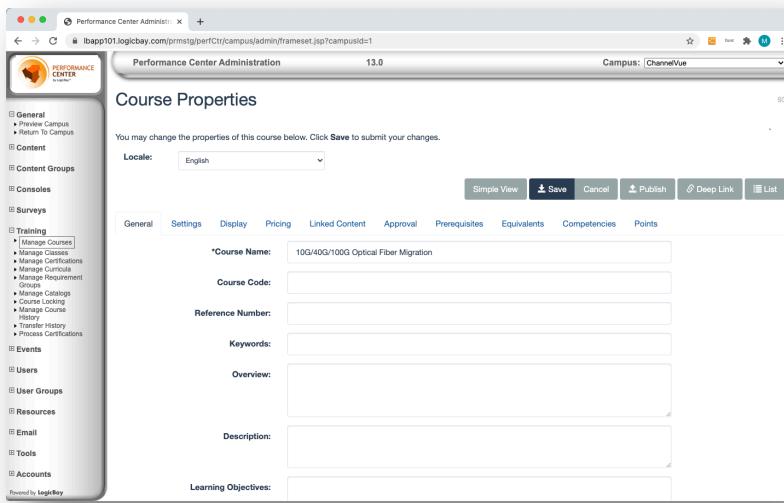
The **course**, **class**, **certification**, and **curricula** properties pages now have two modes:

- 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.

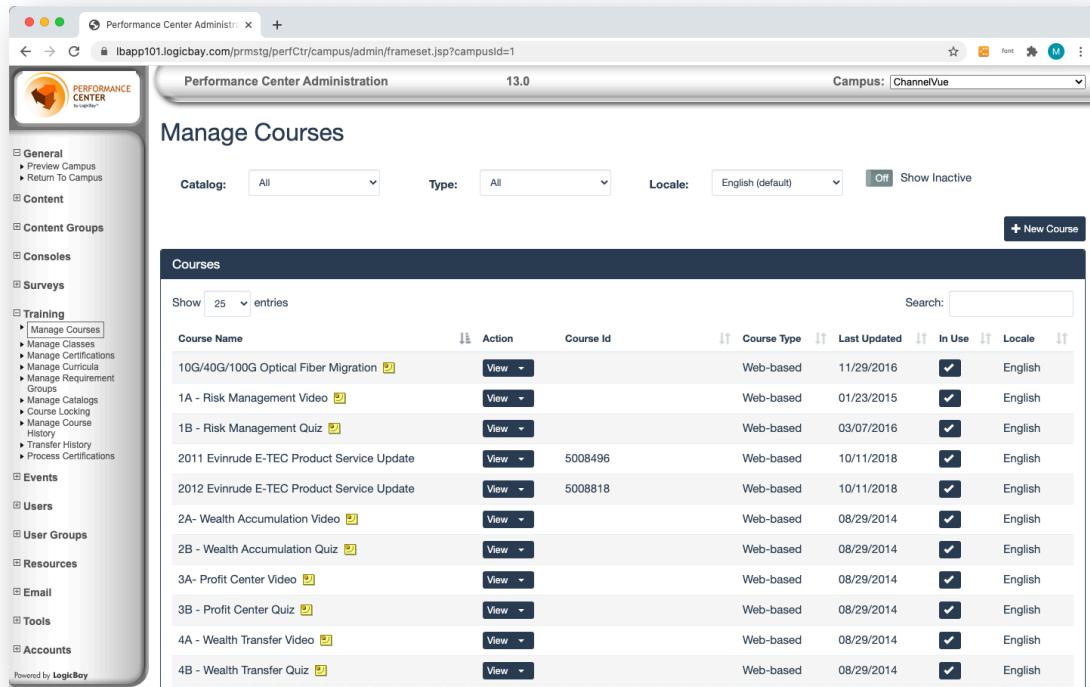


The **Simple View** button returns the view to Simple Mode.

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

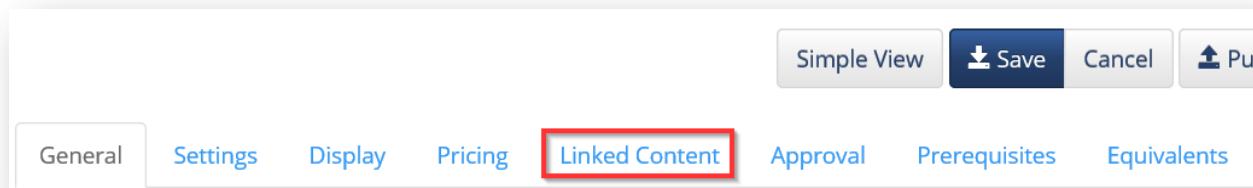
The course list renders into a data table. The course list can be filtered by Catalog, Type, Locale and Keyword Search. Click the **View** action button to view or edit course properties. Click the **New Course** button to create a new course.



Course Name	Action	Course Id	Course Type	Last Updated	In Use	Locale
10G/40G/100G Optical Fiber Migration	View		Web-based	11/29/2016	<input checked="" type="checkbox"/>	English
1A - Risk Management Video	View		Web-based	01/23/2015	<input checked="" type="checkbox"/>	English
1B - Risk Management Quiz	View		Web-based	03/07/2016	<input checked="" type="checkbox"/>	English
2011 Evnirude E-TEC Product Service Update	View	5008496	Web-based	10/11/2018	<input checked="" type="checkbox"/>	English
2012 Evnirude E-TEC Product Service Update	View	5008818	Web-based	10/11/2018	<input checked="" type="checkbox"/>	English
2A- Wealth Accumulation Video	View		Web-based	08/29/2014	<input checked="" type="checkbox"/>	English
2B - Wealth Accumulation Quiz	View		Web-based	08/29/2014	<input checked="" type="checkbox"/>	English
3A- Profit Center Video	View		Web-based	08/29/2014	<input checked="" type="checkbox"/>	English
3B - Profit Center Quiz	View		Web-based	08/29/2014	<input checked="" type="checkbox"/>	English
4A - Wealth Transfer Video	View		Web-based	08/29/2014	<input checked="" type="checkbox"/>	English
4B - Wealth Transfer Quiz	View		Web-based	08/29/2014	<input checked="" type="checkbox"/>	English

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.

Publish 10G/40G/100G Optical Fiber Migration

Show 10 entries Search:

	Catalog	Publish
Assignments		Publish
BRP Catalog		Publish
Default Catalog		Publish
Demonstrations		Publish
Employee Training		Publish
Jane Jones Demo		Publish
LiuGong		Publish
Marketing		Publish
New Partner		Publish
Partner Application		Publish

Showing 1 to 10 of 16 entries

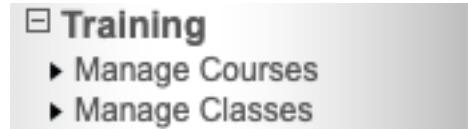
Previous 1 2 Next

Done

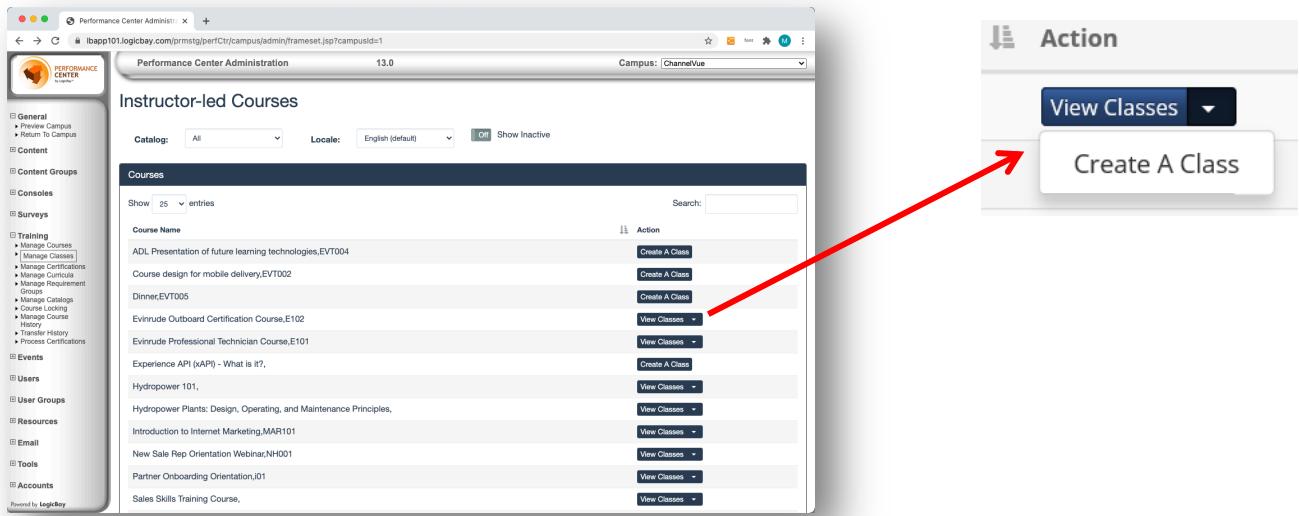
Click the **Publish** button to publish the course in the Catalog. Click the **Unpublish** button to remove the course from the catalog.

CLASS PROPERTIES

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



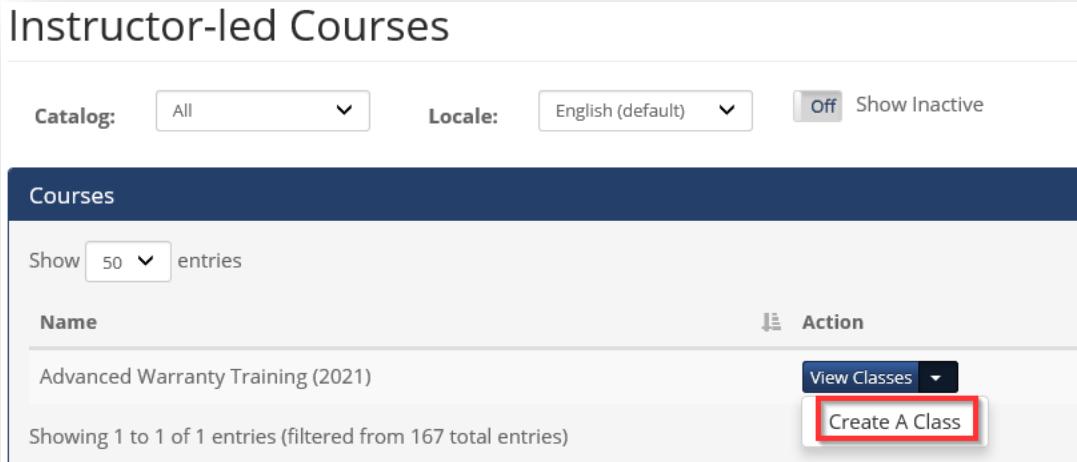
The Manage Classes menu renders a list of all Instructor-Led Courses. The Action button allows a user to create a new class or view a list of existing classes associated with the course.



The screenshot shows the 'Instructor-led Courses' page. On the left is a sidebar with various menu items under 'Content' and 'Training'. The main area displays a list of courses with columns for 'Name', 'Action', and 'View Classes'. A red arrow points from the 'Create A Class' button in the top right corner to the 'Create A Class' button in the 'Action' column of the course list.

CREATE CLASSES

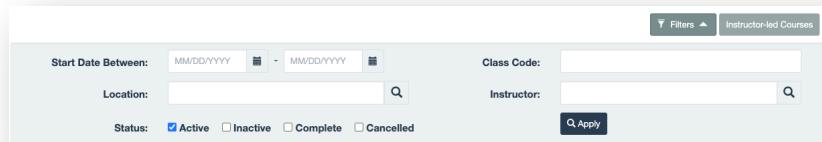
To create a class, use the filter search bar to narrow your course list to the one you want. From there, use the dropdown menu to access the **Create a Class** option.



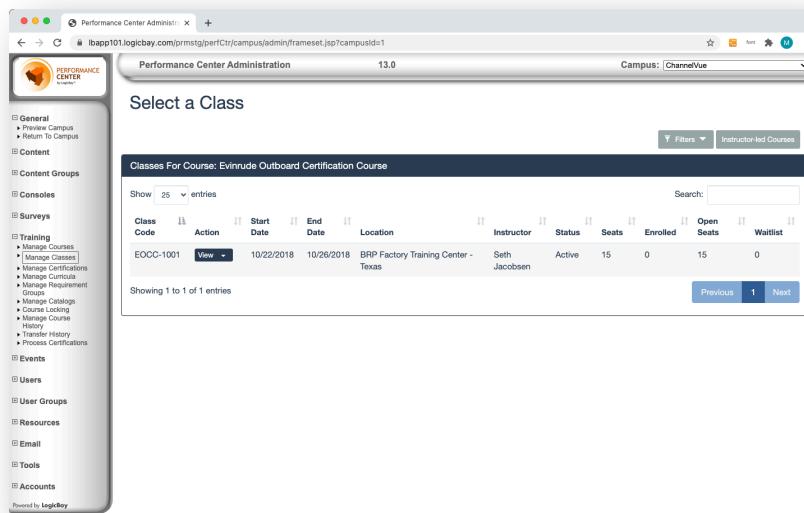
The screenshot shows the 'Instructor-led Courses' page with a single course listed. The 'Action' column for this course contains a 'Create A Class' button, which is highlighted with a red box. The page also includes a filter bar at the top and a message at the bottom indicating 1 entry.

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.



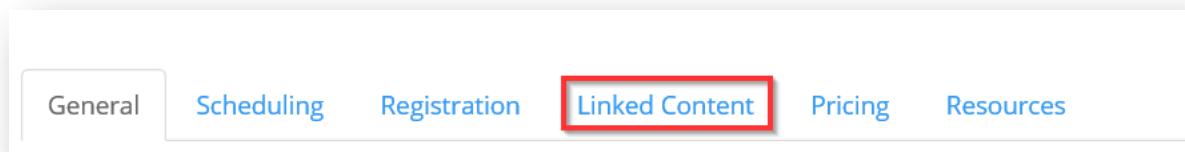
Clicking the View action button displays the Class editor.



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**.

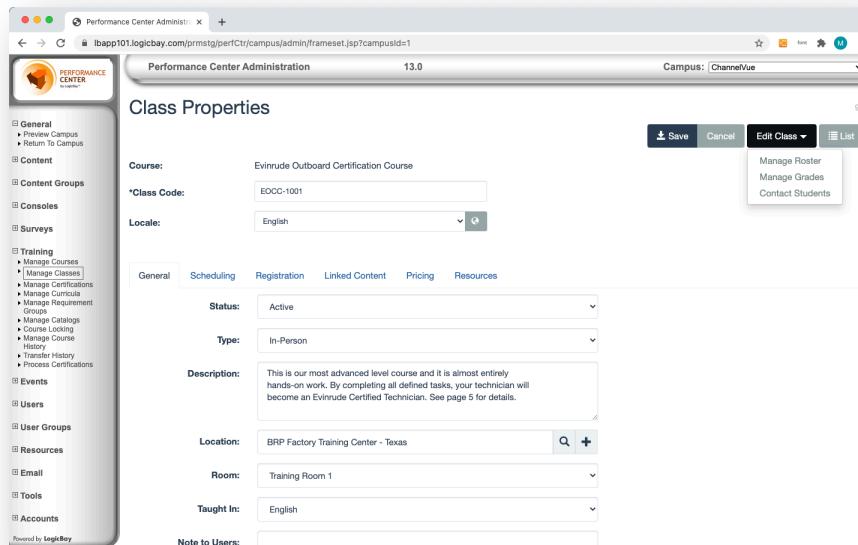


Under Linked Content, there are two types of content.

- 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.



Class Properties

Course: Evinrude Outboard Certification Course

*Class Code: EOCC-1001

Locale: English

Status: Active

Type: In-Person

Description: This is our most advanced level course and it is almost entirely hands-on work. By completing all defined tasks, your technician will become an Evinrude Certified Technician. See page 5 for details.

Location: BRP Factory Training Center - Texas

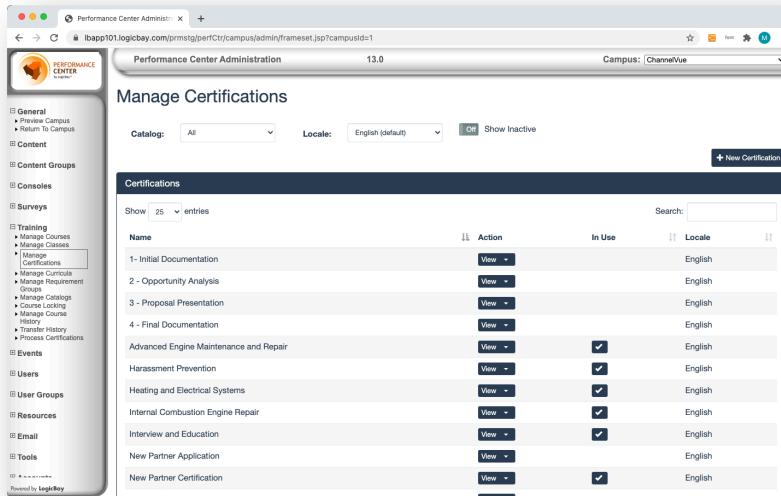
Room: Training Room 1

Taught In: English

Note to Users:

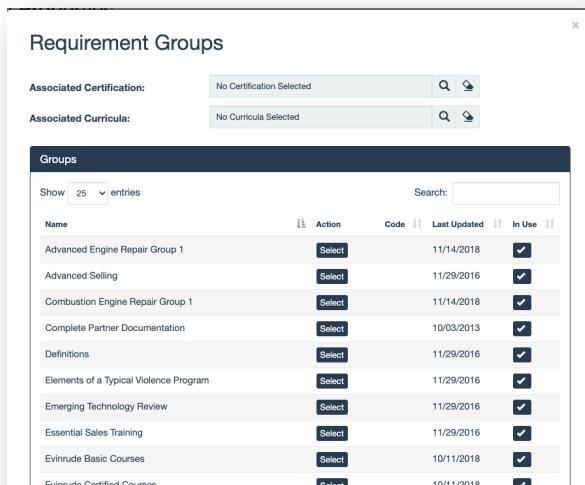
MANAGE CERTIFICATIONS

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.



Name	Action	In Use	Locale
1 - Initial Documentation	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
2 - Opportunity Analysis	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
3 - Proposal Presentation	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
4 - Final Documentation	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
Advanced Engine Maintenance and Repair	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
Harassment Prevention	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
Heating and Electrical Systems	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
Internal Combustion Engine Repair	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
Interview and Education	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
New Partner Application	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English
New Partner Certification	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	English

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



Name	Action	Code	Last Updated	In Use
Advanced Engine Repair Group 1	<input type="button" value="Select"/>		11/14/2018	<input checked="" type="checkbox"/>
Advanced Selling	<input type="button" value="Select"/>		11/29/2016	<input checked="" type="checkbox"/>
Combustion Engine Repair Group 1	<input type="button" value="Select"/>		11/14/2018	<input checked="" type="checkbox"/>
Complete Partner Documentation	<input type="button" value="Select"/>		10/03/2013	<input checked="" type="checkbox"/>
Definitions	<input type="button" value="Select"/>		11/29/2016	<input checked="" type="checkbox"/>
Elements of a Typical Violence Program	<input type="button" value="Select"/>		11/29/2016	<input checked="" type="checkbox"/>
Emerging Technology Review	<input type="button" value="Select"/>		11/29/2016	<input checked="" type="checkbox"/>
Essential Sales Training	<input type="button" value="Select"/>		11/29/2016	<input checked="" type="checkbox"/>
Evinrude Basic Courses	<input type="button" value="Select"/>		10/11/2018	<input checked="" type="checkbox"/>
Evinrude Certified Courses	<input type="button" value="Select"/>		10/11/2018	<input checked="" type="checkbox"/>

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

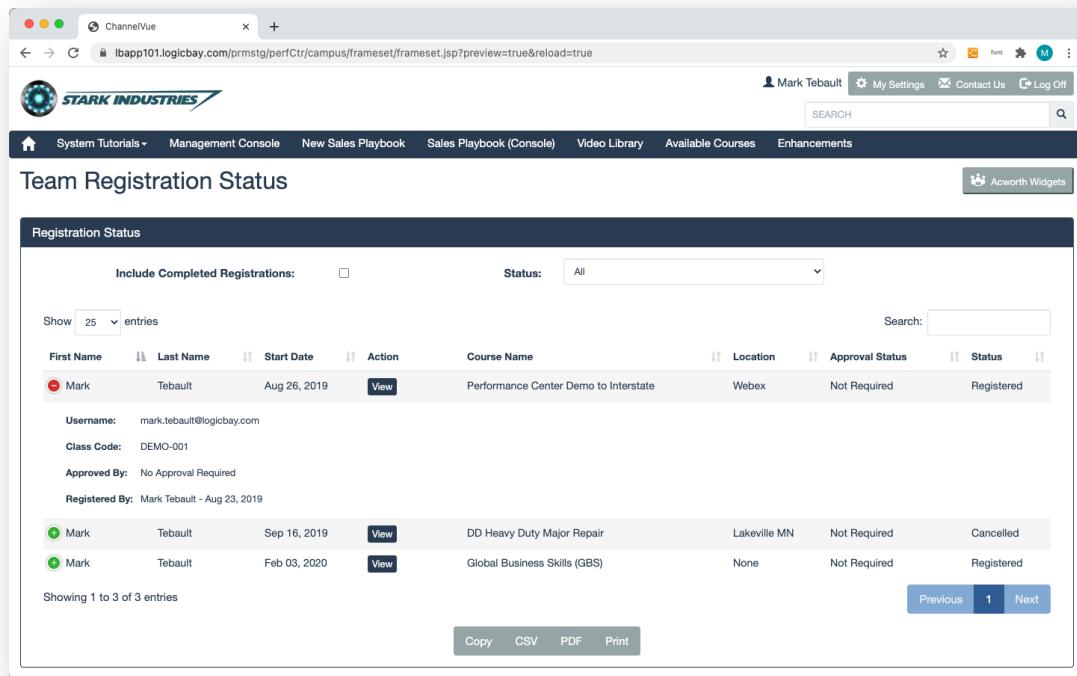
A birthdate field has been added to the user profile. This field is hidden by default; however, it can be made visible and required. The birthdate can be used to create a unique person identifier by concatenating the user's name and birthdate. This unique key can be used to help prevent duplicate users.

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.



First Name	Last Name	Start Date	Action	Course Name	Location	Approval Status	Status
Mark	Tebault	Aug 26, 2019	View	Performance Center Demo to Interstate	Webex	Not Required	Registered
Mark	Tebault	Sep 16, 2019	View	DD Heavy Duty Major Repair	Lakeville MN	Not Required	Cancelled
Mark	Tebault	Feb 03, 2020	View	Global Business Skills (GBS)	None	Not Required	Registered

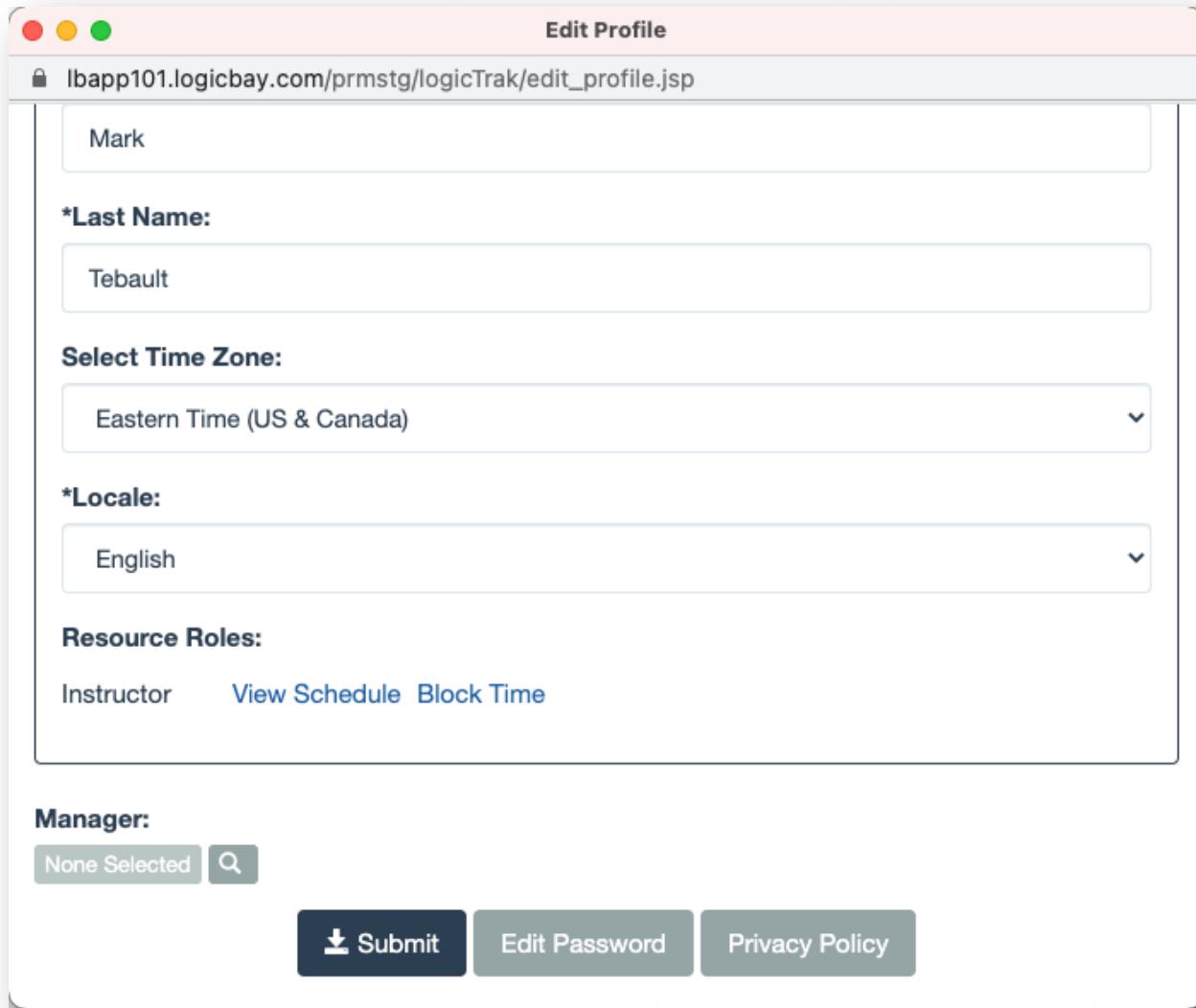
Team Registration Status is available as a new Page in the content repository. Optional configuration allows an individual learner view, or team view of this page.



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.



The screenshot shows the 'Edit Profile' page for a user named 'Mark'. The page includes fields for Last Name ('Tebault'), Time Zone ('Eastern Time (US & Canada)'), Locale ('English'), and Resource Roles ('Instructor', 'View Schedule', 'Block Time'). A 'Manager' section is present with a 'None Selected' button and a search icon. At the bottom are buttons for 'Submit', 'Edit Password', and 'Privacy Policy'.

Mark

***Last Name:**
Tebault

Select Time Zone:
Eastern Time (US & Canada)

***Locale:**
English

Resource Roles:
Instructor View Schedule Block Time

Manager:
None Selected 

 **Submit** **Edit Password** **Privacy Policy**

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

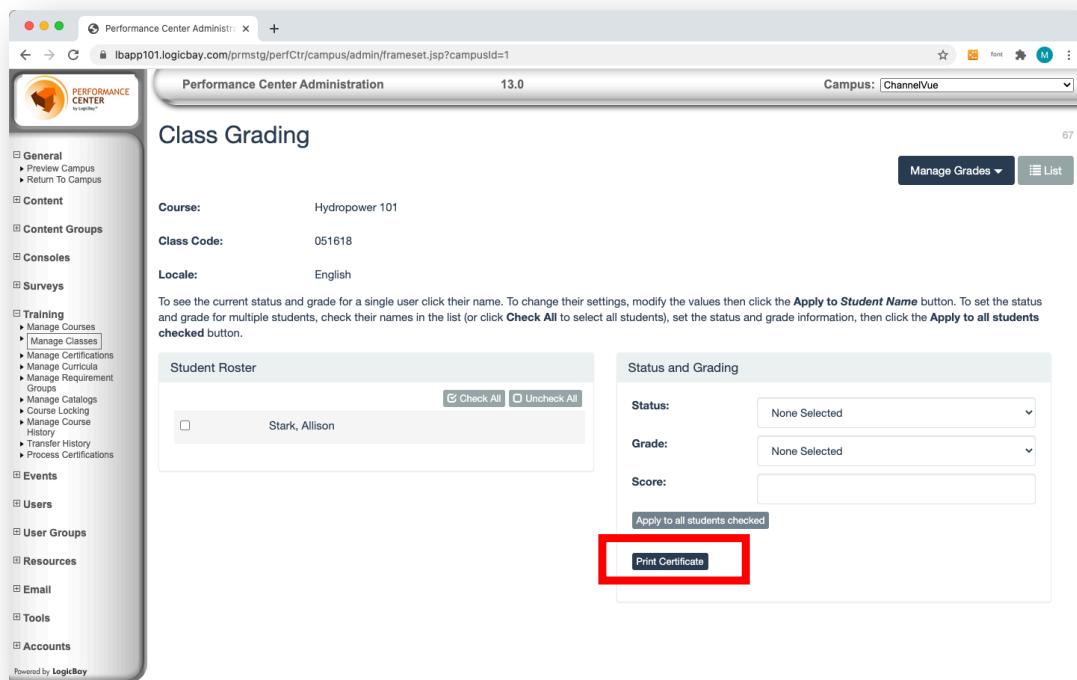
HIDE INSTRUCTOR INFORMATION IN CLASS DETAILS

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.



The screenshot shows the 'Class Grading' page in the Performance Center Administration interface. The left sidebar contains a navigation menu with sections like General, Content, Content Groups, Consoles, Surveys, Training, Events, Users, User Groups, Resources, Email, Tools, and Accounts. The 'Training' section is expanded, showing sub-options such as Manage Courses, Manage Certifications, Manage Curricula, Manage Requirement Groups, Manage Catalogs, Course Locking, Manage Course History, Transfer History, and Process Certifications. The main content area is titled 'Class Grading' and shows details for a course: Course: Hydropower 101, Class Code: 051618, and Locale: English. Below this, a 'Student Roster' table lists 'Stark, Allison'. To the right, a 'Status and Grading' panel includes fields for Status (None Selected), Grade (None Selected), and Score, along with an 'Apply to all students checked' button. A prominent red box highlights the 'Print Certificate' button at the bottom of this panel.

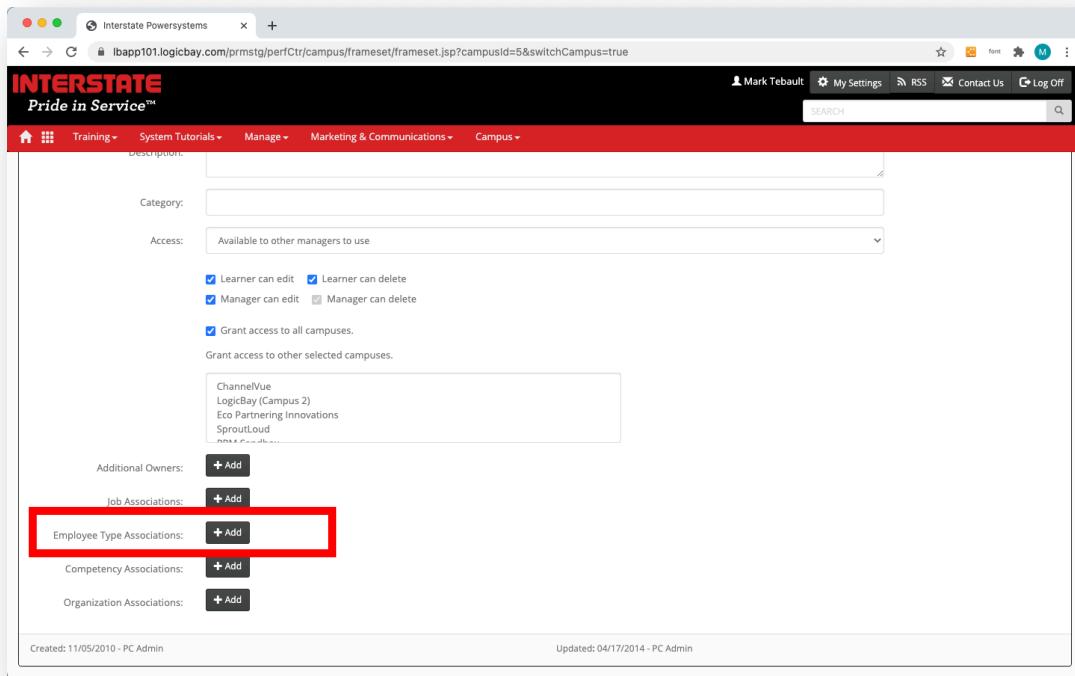
RESTRICT CLASS SEAT CAPACITY

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.



The screenshot shows a software interface for 'INTERSTATE' with a red header. The main content area has a red background and contains several input fields and checkboxes. A red box highlights the 'Employee Type Associations' section, which includes a list of options and a '+ Add' button. Other sections visible include 'Additional Owners', 'Job Associations', 'Competency Associations', and 'Organization Associations'. The interface is a web-based application with a standard browser header.

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.