WISETAIL RELEASE NOTES
Q4.2020.1

COMPILED BY
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DATE
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OVERVIEW

The purpose of this document is to provide a summary of features, fixes and outstanding enhancements that have been completed as of the indicated release of the Wisetail Platform.

CONTENTS

Q4.2020.1 RELEASE NOTES

Release Goals/Themes

The key business objectives achieved in this release are:

- Daily Checklists Tool
- New functionality to support multi-language learners (Spanish at release)
- New functionality to send welcome emails from the user profile
- New functionality of User Report to include Last Login Date/Time
- Ordering of fields in rule engine
- Sorting & Filtering of Module Events and Sessions
- Date/Time format consolidation for all reports
- Update on Linked Profile Field for Registration Page

Feature Functionality

This section captures the new features/fixes delivered as part of this release.

Daily Checklists Tool

Single Sign-On Integration with LMS

All users login to the Daily Checklist Tool's widget through LMS. Depending on their role, Checklist Users get access to the Fulfillment side of the application, while Checklist Admins can access to both Fulfillment and Administration side.

Checklist Creation & Administration

Overview

A mobile responsive and easy to use interface has been developed to help clients author and administer a variety of complex checklists either at their office using their computer or on the go through their mobile devices.

Checklist Admins will have access to a pre-existing set of Checklist Templates in PDF format that comes with their implementation to serve as a guide for checklist creation.

Currently Checklist Admins will have to start building their own checklists.

After a Checklist Admin logs into the Daily Checklist Tool, they will see a list of checklists that were created by all Checklist Admins of their company sorted to display the most recent created, edited, or activated checklists.

Checklists can easily be identified by their background color and icon. Checklist Templates are tagged by a "Template" icon and Inactive Checklists are tagged by an "Inactive" icon. They both have a grey background. "Active" Checklists are easily distinguished by their white background. Checklist Users will only be able to view and fulfill Active Checklists. After a Checklist has been created it will remain in "Inactive" status until it is ready to be released to Checklist Users.

Some checklists are required to be fulfilled across all locations on a daily basis. These checklists are tagged with a "Required" icon. The right side bar can be used to filter only "Required" checklists. In combination with Status filter and sorting Checklist Admins can easily narrow the list of checklists displayed.

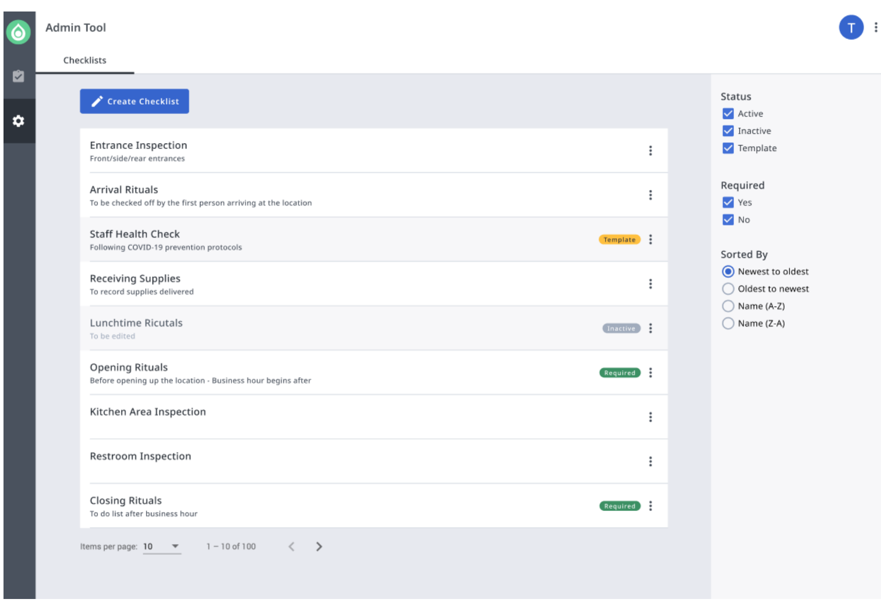

Figure 1 – Admin Tool – Home Screen

Checklist Admins can navigate between Admin Tool and Fulfillment screens through the left side navigation panel.

Checklist Authoring

The "Create Checklist" button redirects Checklist Admins to an easy to use step-by-step process of creating a Checklist.

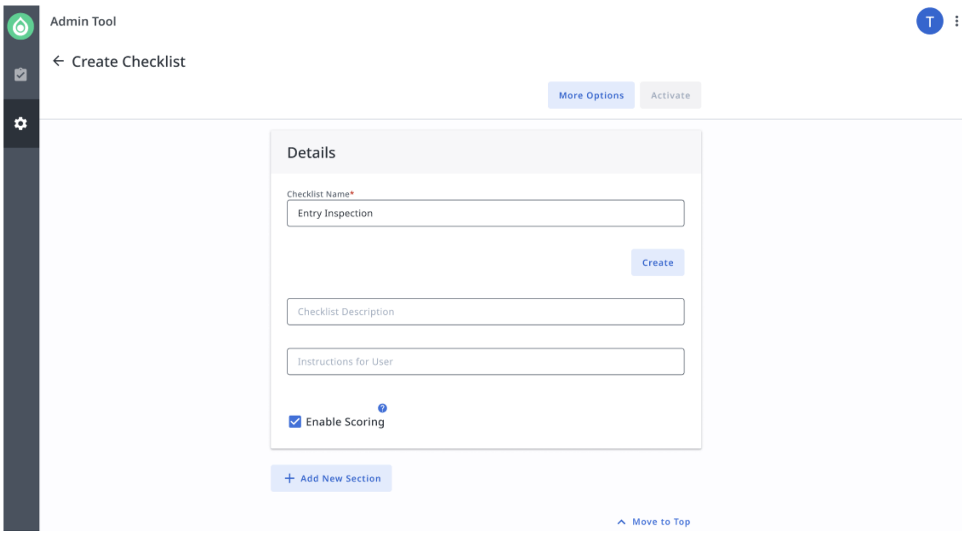

Figure 2 – Fulfillment - Create Checklist

Checklists are made up of Checklist Name, Description, Instructions for Users, Option to Track Scoring Metrics, and various sections with question and response types.

Checklist Admins can "Preview" checklists so they can see how Checklist Users would see them before deciding to "Activate" them. After checklists have been activated, they will become visible to Checklist Users.

Once Checklists have been "Activated", they can no longer be edited.

Checklist Admins can select the appropriate Section to add in-order to create the type of responses they expect from Checklist Users.

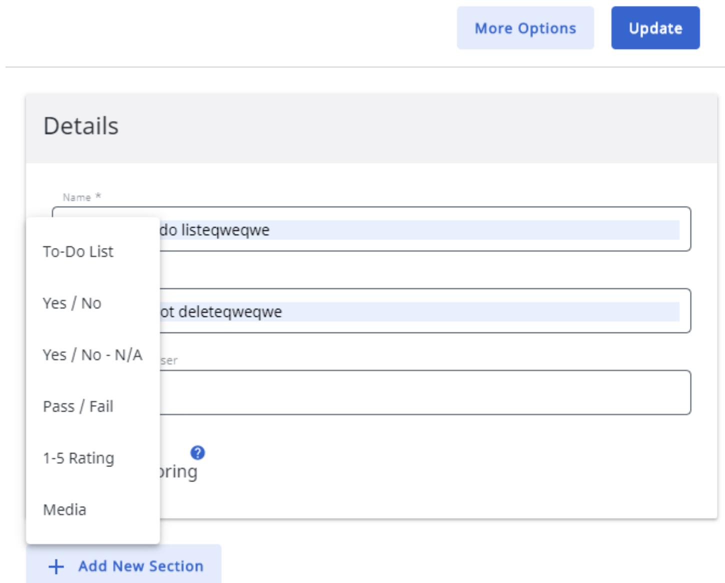

Figure 3 – Fulfillment - Create Checklist - Add New Section

Certain checklists must be completed on a Daily Basis. The Checklist Admin can bookmark such checklists. Bookmarked Checklists will appear on Checklist Planner and are tagged with a special icon that can be clicked to Bookmark / Unbookmark a Checklist.

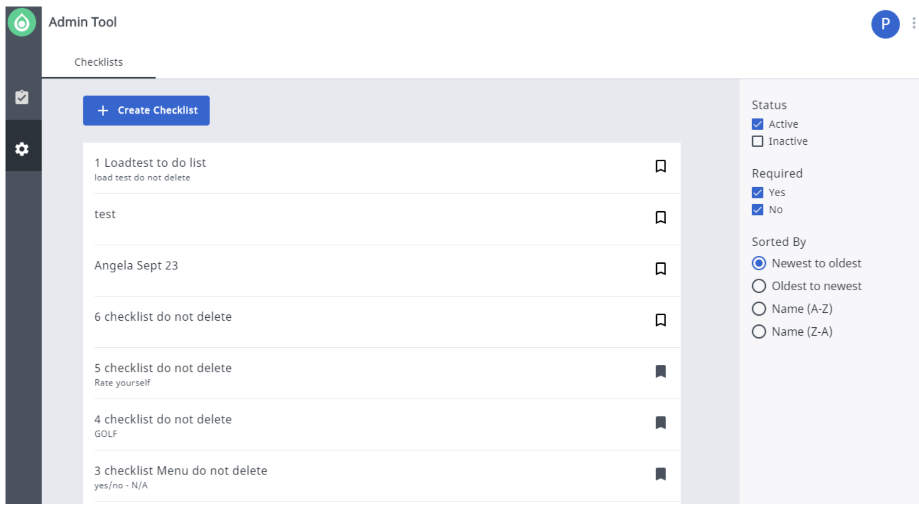

Figure 4 – Admin Tool - Main screen

Checklist Planner, History, & Insights

Planner

The Planner provides a list of Checklists that Checklist Users can fulfill.

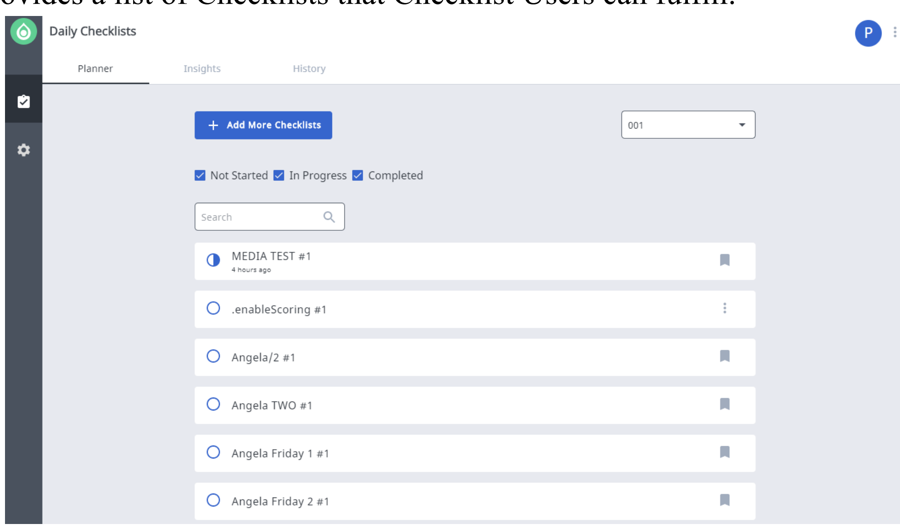

Figure 5 – Fulfillment - Planner

A Checklist User may belong to multiple locations that is why we provided a dropdown list of locations so that each checklist can be fulfilled for the appropriate location.

Checklists have 3 statuses and appropriate icons help identify what stage they are at.

1. “Not Started” which are checklists that are Required to be completed as indicated by a Bookmark icon and checklists that were added through the “Add More Checklists” button. These have a circle icon.

2. “In Progress” which are checklists that some work was done on them with at least one response provided to a question. These have a semi-circle icon.

3. “Completed” which are checklists that have been submitted. These have a full-circle and a checkmark icon.

Using the Search, Checklist Users can type any letter or keyword to quickly filter Checklists.

Checklist Users can click on a checklist to fulfill and submit it. Sometimes multiple employees need to fill out the same checklist but have to submit their own checklist as proof of work done. They can click on “Add More Checklists” to add a checklist to edit, and submit.

If Checklist Users forgot to complete checklists from the day before, they cannot complete them today. For example, a Store Opening Checklist that was not properly completed yesterday cannot be completed today

Checklists that are not Bookmarked can be removed if Checklist Users added them by mistake or if the work is no longer required.

Checklists that were completed yesterday, will appear for today in the order they were completed yesterday.

A Record of Submission will display the username, location, date and time of the Checklist submission.

Insights

Checklist Insights display metrics on Required Checklists that were completed on the Planner tab.

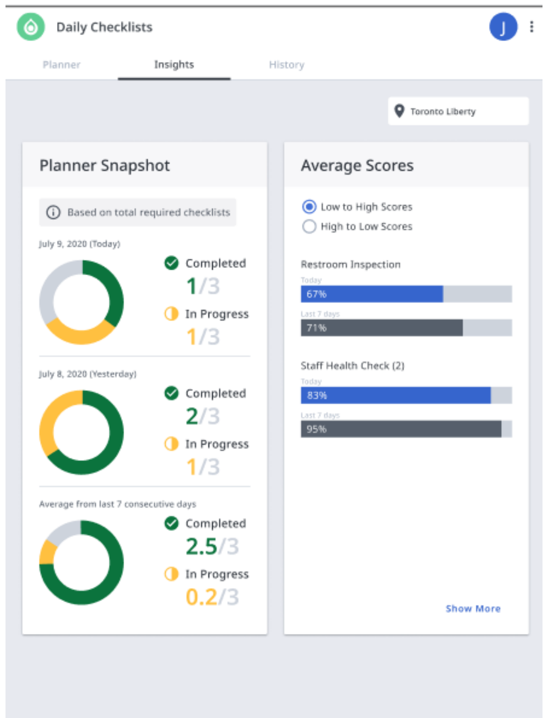

Figure 6 – Fulfillment - Insights

Planner Snapshot

The system will display 3 circular progress bars that shows the number of Required Checklists that are In Progress and Completed. It will also display the total number of Required Checklists for today, yesterday, and the average of the last 7 consecutive days.

Average Scores

The system follows a certain Scoring Mechanism to determine how Average Checklist Scores are calculated.

1. The system will display two horizontal progress bars for each Completed Checklist one for today and one for the last 7 days average.
2. Each progress bar will have % completion of each checklist.
3. The order of Checklist scores can be changed to show highest % completed checklists vs. lowest % completed checklists.
4. Results will get skewed if closed days fall within the last 7 days.

History

The History tab displays Checklists that were In Progress or Completed in the past.

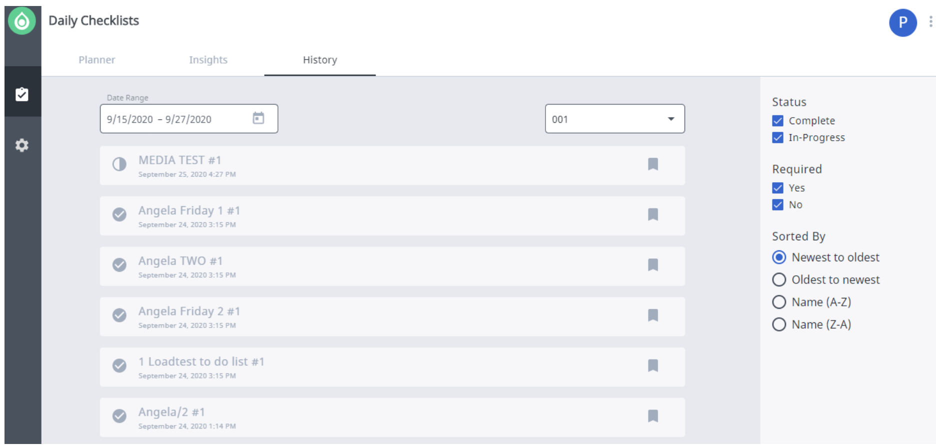

Figure 7 – Fulfillment - History

A Date Range selector allows date range selection of up to 2 years ago for every location.

Past Checklists cannot be edited.

The Checklist User can click on a checklist to view the answers selected, the notes entered, and the checklist history that shows the name of the user, location, date and time the Checklist was submitted.

All Checklists will display based on the most recent modified date to the last modified date whether they were Completed or In Progress.

With filtering and sorting the Checklist User can find the right checklist for viewing.

New functionality to support multi-language learners (Spanish at release)

- **Wisetail Admin: Turning a Language 'On'**

Provides language control for a Wisetail Admin, within the Admin Tool. Through this, a Wisetail Admin could turn any language *On,* that engineering has implemented.

- **This turns on the following:**
    - Granular Multi-Language Management (admins can control certain areas of translation)
    - Dynamically Translated Text (comments on media/modules/posts are translated with a click)

- System Translated Text (Wisetail provided translations, non-editable)
- Onboarding Language Selection (Welcome, Registration)
- Login Screen Language Selection
- Post-Login Language Change

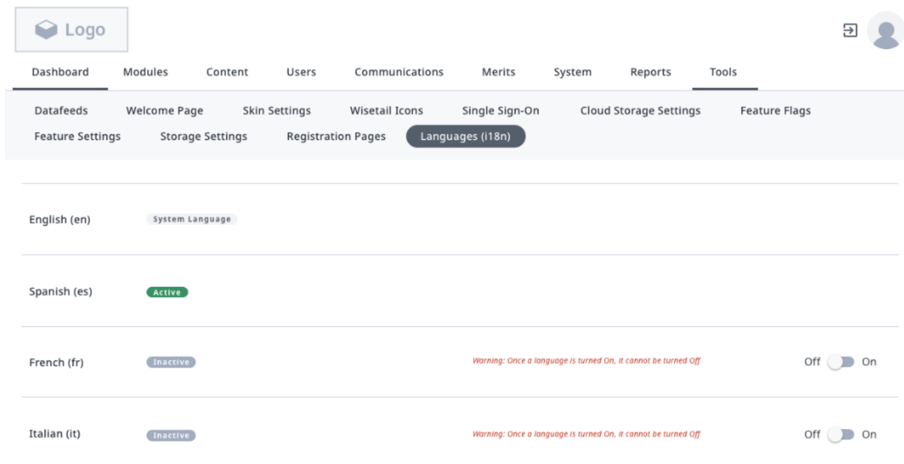

Figure 8 – Admin Tool – Language Pill

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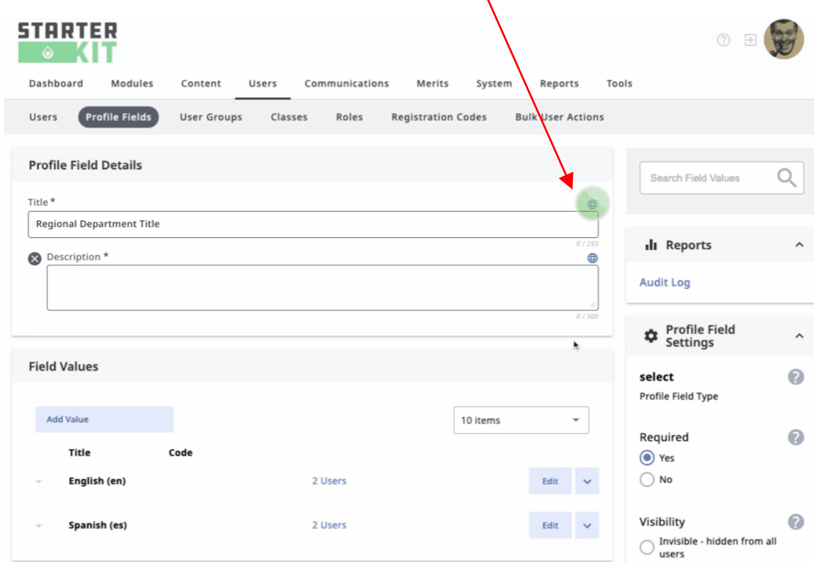
Super Admin: Granular Multi-Language Management

Admins can manage multi-language support for designated inputs in the LMS.

Profile Fields
- Modules
- Media
- Tags
- Categories
- Custom Pages
- System Pages
- Page Widgets
- Welcome Pages
- Registration Pages
- System Settings
- Terms

- Clicking the Globe icon enables access to multiple manually entered language fields



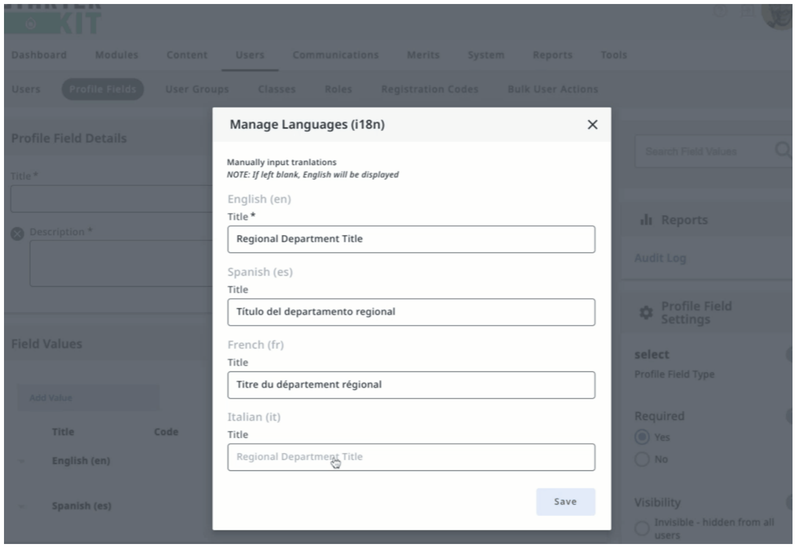


Figure 9 – Admin Tool – Globe Icon Access

Learners: Welcome and Access Code Email Language

For users who have never interacted with a Wisetail system or who do not have HRIS information around preferred language — user will now be provided a language link array at the bottom of the Welcome and Access code emails.

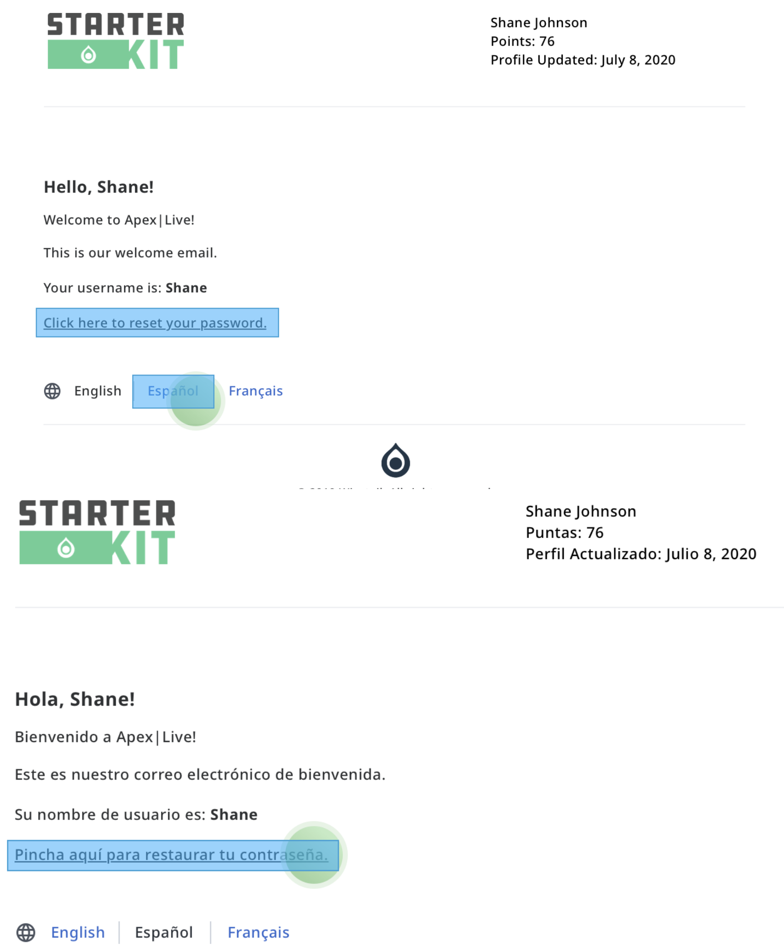


Figure 10 – Internationalization Email Templates

Welcome and Registration Page Language Selection

Select Language is added to the top of both Welcome and Registration pages. Selecting new language refreshes page with selected language.

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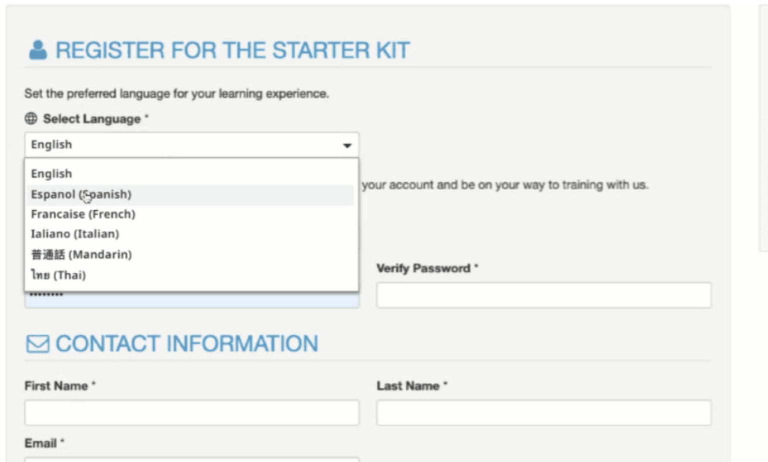

Figure 11 – Internationalization Registration Page

Change Preferred Language - Post Login

Users have the ability to change their *preferred language*, after login.

a. Nav Globe Icon

User click new Globe icon in secondary nav — selects new language from dropdown. Upon selection from the user a modal is fired asking the user to confirm their new preferred language.

b. Edit Profile

Within a users Profile page, in the right column panel, the users preferred language is listed just below Start Date (in same style). User can edit the language by clicking on *Edit Profile.* Within *Edit Profile*, a non-removable *Preferred Language* panel that contains a language selection control is added just below *Login Credentials* panel. Upon selection from the user a modal is fired asking the user to confirm their new preferred language.

c. Confirmation of Any Language Change

A modal would immediately fire after a language change is made asking the user to confirm their preferred language.

- This will be a dual-language modal:
  - Primary: the newly selected locale

- Secondary: the user's current preferred locale

Dynamically Translated Comments

Ability for dynamic translation for all user Comments on Posts, Recent Comments (widget), Recognition Messages (widget).

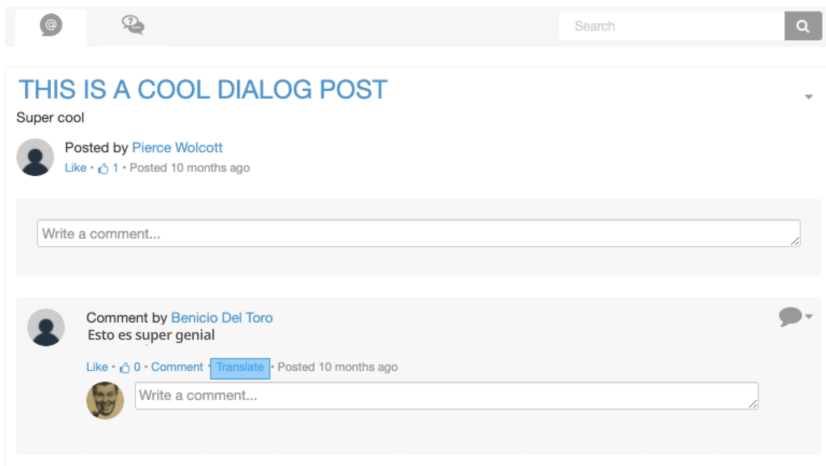

Figure 12 – Internationalization Dynamic Translations

Send Welcome Email from the User Profile Page

The Admin tool has been improved in terms of the partial admins ability to send a welcome email from the user profile. With the new update a partial admin can now navigate to a user's profile and send a welcome email to the specific user. This is especially important since now a partial admin no longer needs access to the *Communications* tab under the admin tool in order to perform this action. This ensures that a super admin can delegate partial admin duties and ensure that the partial admin will:

- Not accidentally change the entire welcome email message for all users by having access to the *Communications* menu.
- Ensure that the partial admin can send out a single Welcome Email message rather than performing a wide broadcast to all users.

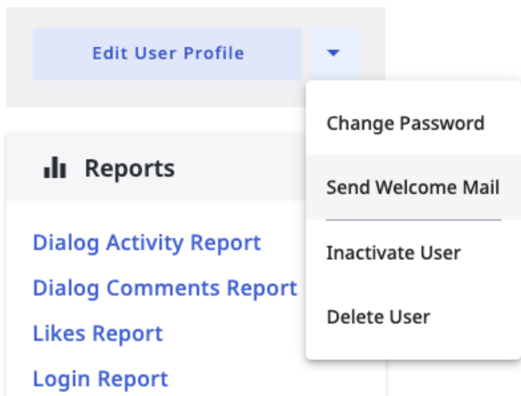

Figure 13 – Send Welcome Mail

In order for the partial admin to be able to access this functionality, the role that the partial admin is associated to will need to have the following permission set under *Role Abilities*:

Users → *User Management* → *Send Individual Welcome Mails*

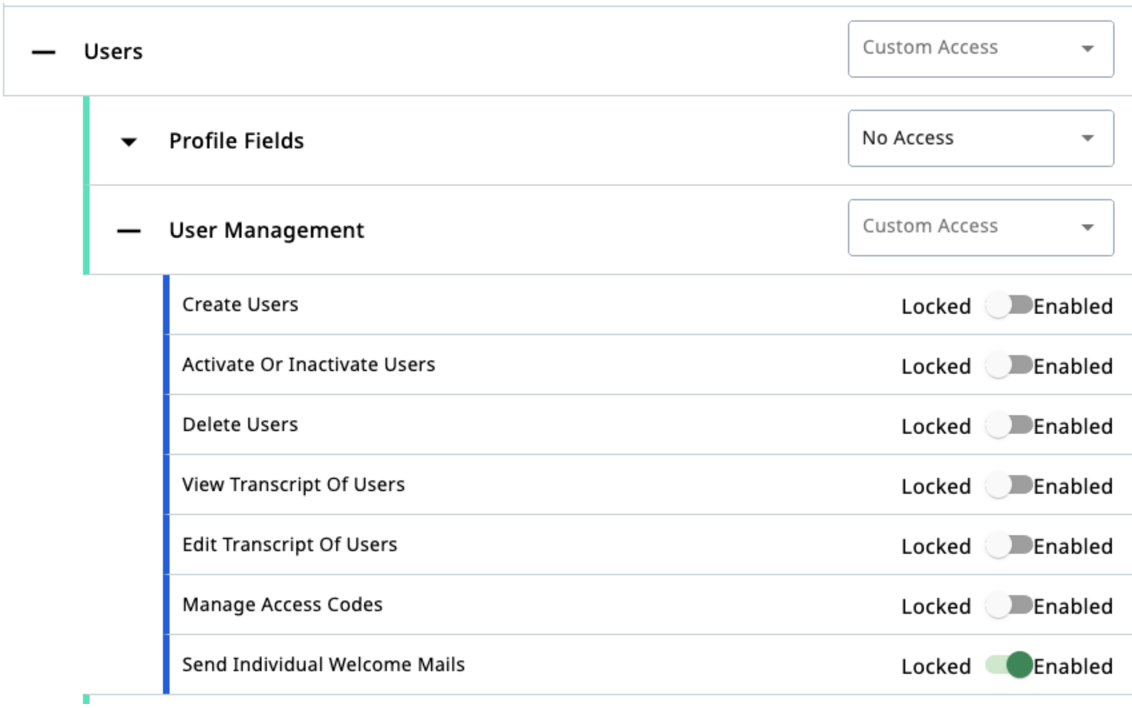

Figure 14 – Send Individual Welcome Mails permission

User Report to include Last Login Date/Time

The User Report from the admin tool has been improved to now include a column by default that displays the last login date and time of the user(s) in the report. A few items to note about this added column:

- The *Last Login* column is available by default in the report and cannot be removed since it is considered as an "Included Column".
- The *Last Login column* will be placed between the *Login Count* and *Created At* columns in the report.
- The *Last Login* column as well as the *Created At* and *Updated At* columns now all have the same date and time format as follows: *YYYY-MM-DD hh:mm:ss TMZ*. Where *TMZ* stands for the three letter time zone code where applicable.

Login Count	Last Login	Created At	Updated At
74	2020-09-29 19:06:29 MDT	2013-09-08 09:22:21 MDT	2020-09-29 19:17:38 MDT

Figure 15 – User Report – Last Login Column

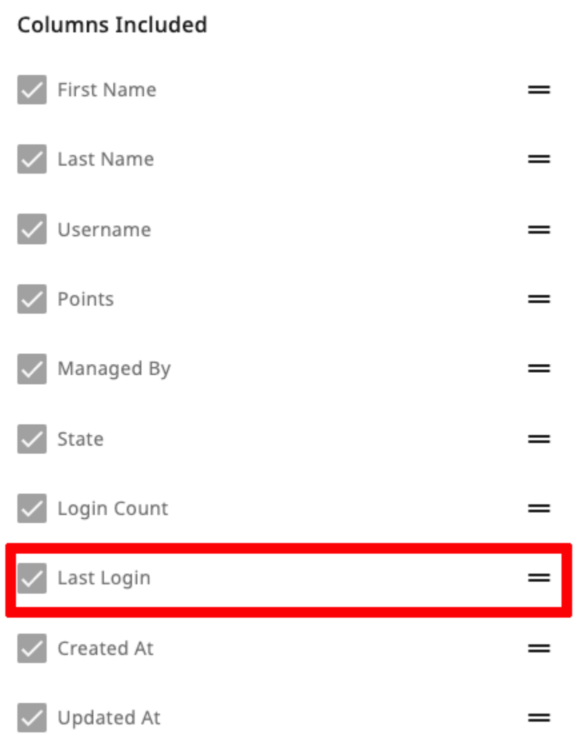

Figure 16 – User Report Manage Columns - Last Login

Ordering of fields in the Rule Engine

The *Profile Field* and *Profile Field Value* selection in the Rules Engine within the admin tool have been organized alpha-numerically to be more intuitive for an admin user to scroll through and see their profile field data in sequential order. This change has been applied in all areas of the admin tool where the Rules Engine is leveraged.

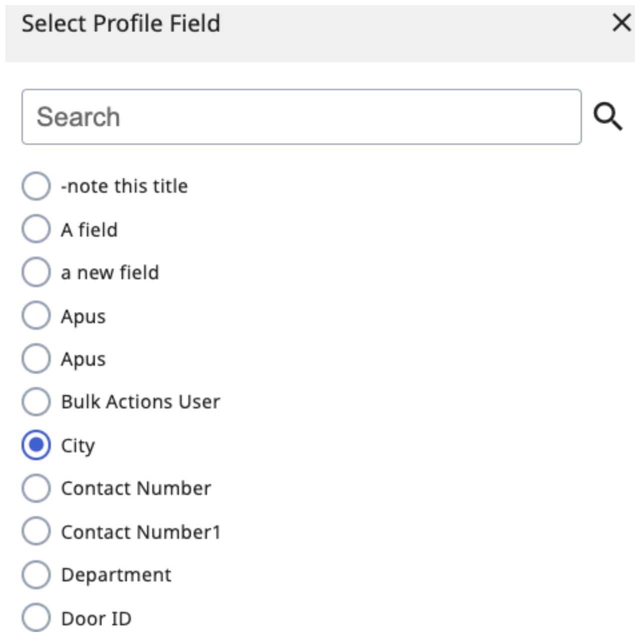

Figure 17 – Rule Engine – Alpha-numeric Ascending Order for Profile Field

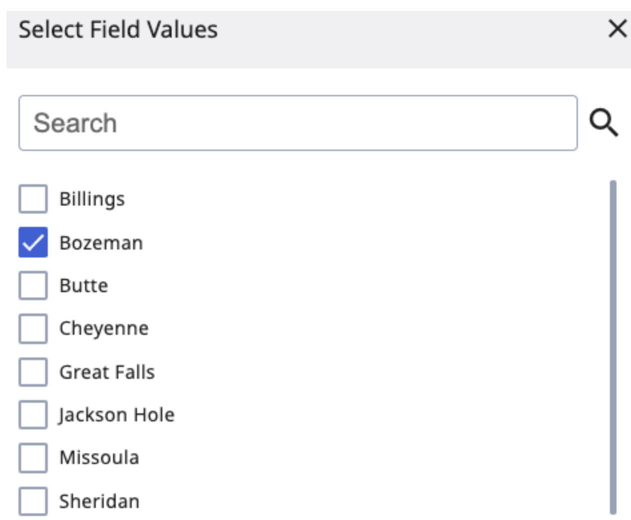

Figure 18 – Rule Engine – Alpha-numeric Ascending Order for Profile Field Values

Sorting & Filtering of Module Events & Sessions

Furthering making the admin tool interface more intuitive, the following areas have also been organized in an increasing order to facilitate the admin users ability to efficiently navigate the desired content areas and locate exactly what is needed and find it where it is expected to be located.

The following areas have been improved in terms of ordering where the interface now orders them from least recent to most recent date/time:

Admin tool → Content → Events → [event name] → Event Details

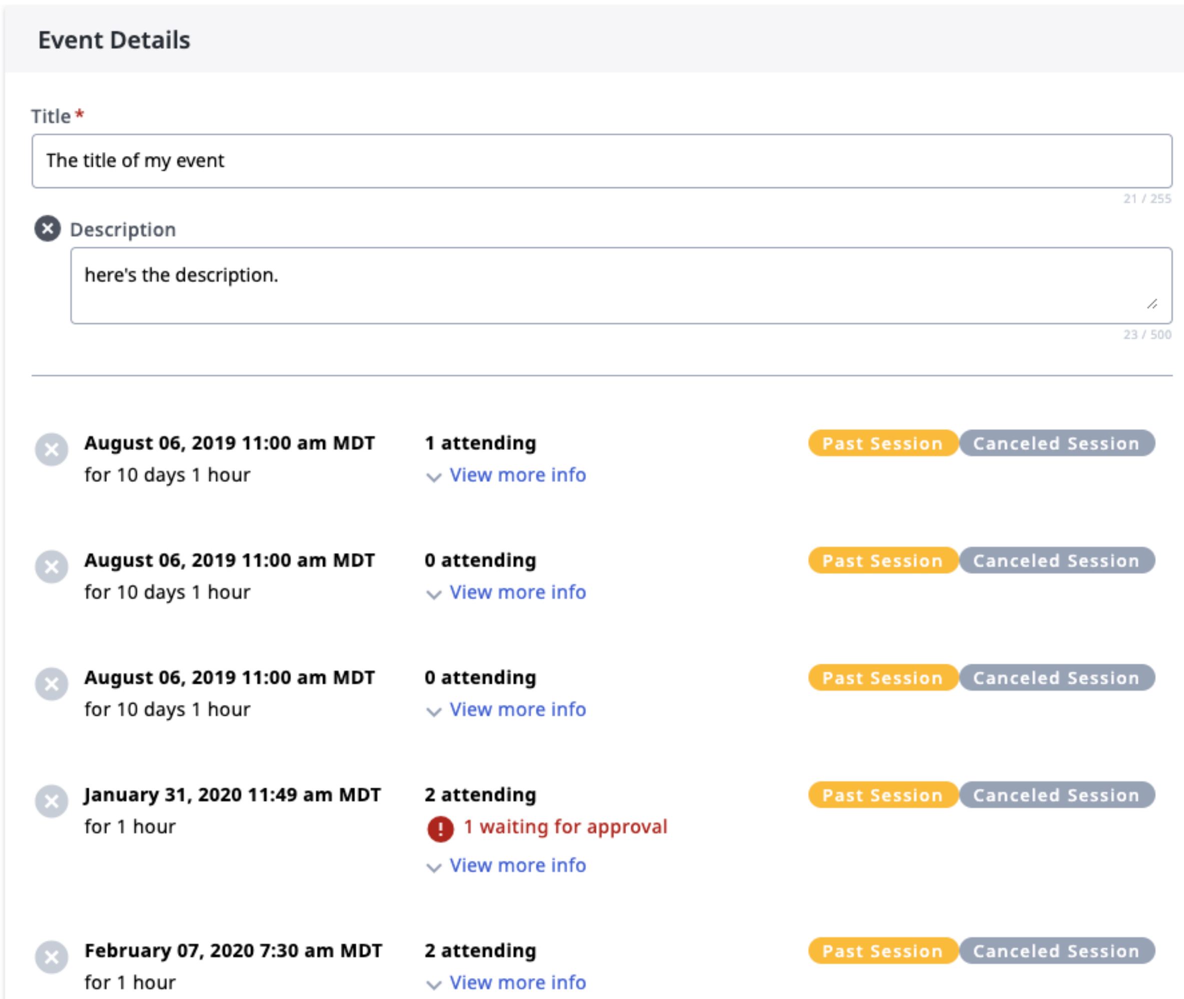

Figure 19 – Event Details – Increasing Date Order for Event Details

Admin tool → Modules → Modules → [module name] → Module Details

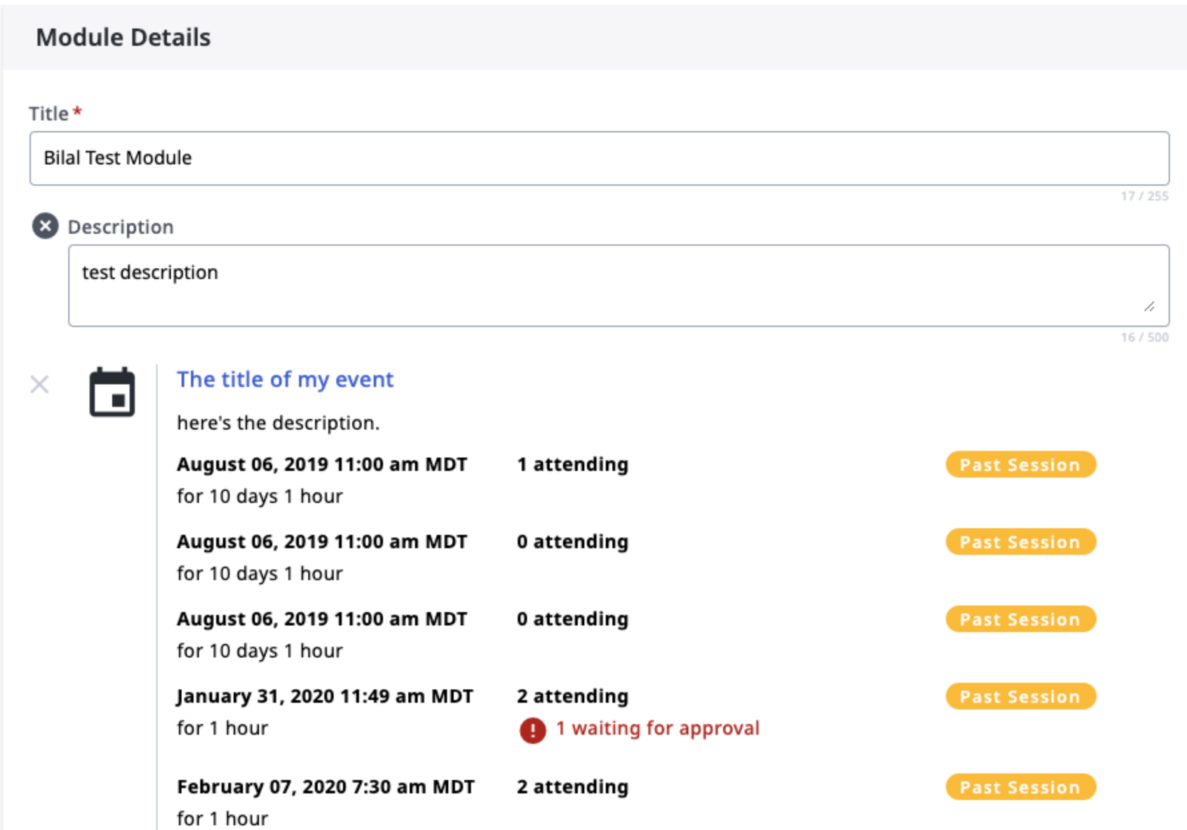

Figure 20 – Module Details – Increasing Date Order for Event Details

Under the *Admin tool → Content → Events → [event name] → Event Details* section there is also now a dropdown filter that will allow the admin user to choose from the following three options in order to ensure that they visualize the appropriate information when needed. The data will always be displayed from least recent to most recent date/time order.

- All Sessions → Display all *Past* and *Upcoming* Sessions
- Past Sessions → Will display only sessions for which time has already elapsed
- Upcoming Sessions → Will display only sessions that have yet to start

By default, the selection will always be *All Sessions* when viewing any *Event Details*.

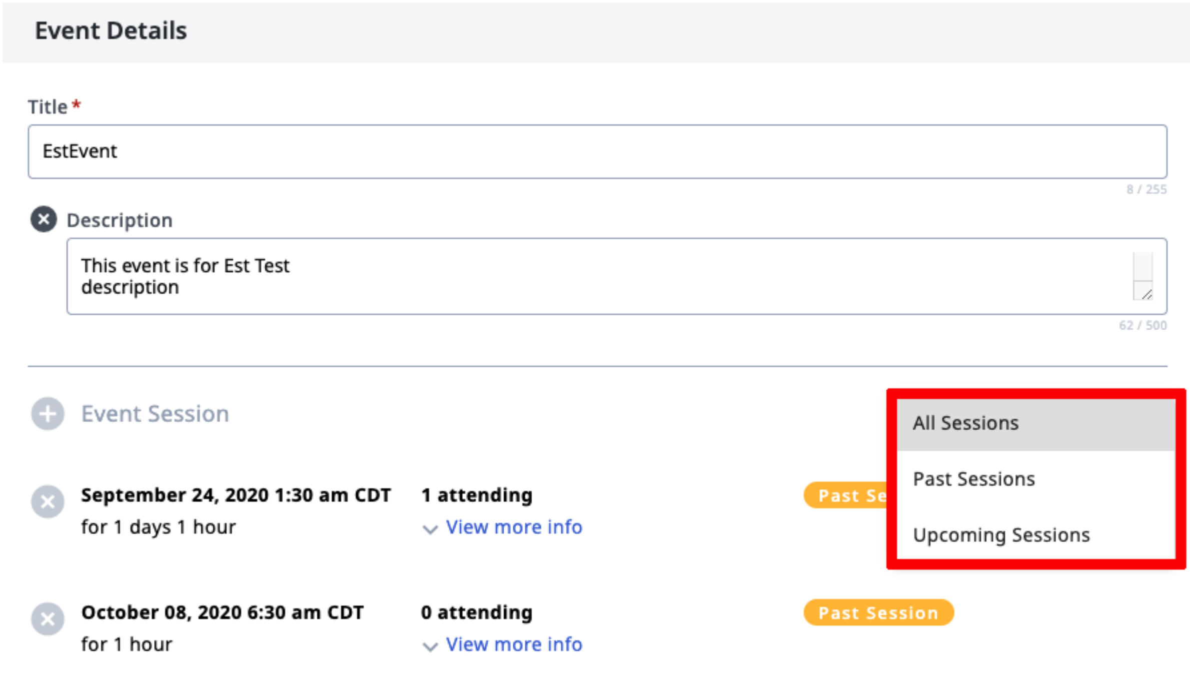

Figure 21 – Event Details – Filtering Event Sessions

Date/Time Format Consolidation for All Reports

Delivering on a consistent experience throughout all of our reports in the admin tool, the admin user will now be able to see all date/time formats in a uniform layout that will be displayed as below:

YYYY-MM-DD hh:mm:ss TMZ.

Where *TMZ* stands for the three letter time zone code where applicable.

The time zone displayed will vary on the time zone selection made under the *Admin Tool* → *System* → *Settings* → *Scheduled Email Timezone* setting and can vary based on the region and the adoption of Daylight Savings Time for the region (where applicable).

Update on Linked Profile Field for Registration Page

The previous release introduced the ability to now leverage Linked Profile Fields on the registration page. This functionality has further been improved upon to now allow for the ability for the Wisetail admin user to include more than one Linked Profile Field on the registration page.

Enhancements & Fixes

This section outlines the detailed information of the enhancements and fixes delivered as part of the current release.

Component	Enhancement Description
Reports	[CREV-1] - Add a specific date/time format to all reports in WLMS
UI	[CREV-2] - Alpha-numeric ordering of fields in the Rule Engine
Event UI	[CREV-6] - Sort Event Session by date/time ascending
Module UI	[CREV-9] - Sort Module Events by date/time ascending
Event UI	[CREV-10] - Filter Event Sessions by pre-defined filters
Welcome Emails	[CREV-109] - [Welcome email from Roles] - Ability to send welcome email from a user's profile w/o the need to delegate the "Communication" tab
Reports	[CREV-241] - [User Report] - Add 'Last Login' column to User Report
UI	[CREV-544] - [Eco_dialogs] video will display when processing is complete text needs spacing
Roles	[CREV-554] - System Roles pages has missing per page dropdown
Roles	[CREV-555] - Some of the System Role pages has blank rows
Search 1.0	[CREV-570] - Module description search doesn't display results with hyphenated characters
Search 1.0	[CREV-571] - On searching for any file name with a .jpeg extension, the search result pertaining to that file is coming towards the end of the search
Tests	[CREV-677] - [Test] - Tests attempted for the first time shows warning "You have used up all of your attempts."
UI	[CREV-695] - [Welcome Page] - Changes made to my profile via the Welcome Page are not working
UI	[CREV-698] - [Welcome Page Sidebar] - information not displaying

Figure 22 – Enhancements & Fixes Table

Outstanding Enhancements

This section captures the detailed information of the known outstanding enhancements as part of the current release.

Component	Enhancement Description
Tests	[CREV-240] - Admin Tool - Limit Test Attempt Notifications to Admin's audience
Linked Profile Field on Registration Page	[CREV-547] - [Module] Searched module does not show @work or NEW flag on it
Optimization	[CREV-433] - [MySQL] - Query Cache issues
UI	[CREV-234] - [BUG - CREV-42] - Percentage not updating on exporting spinner for Test Report
UI	[CREV-467] - [BUG-CREV-187]: The child module inside a Document module does not show up module view icon and like icon
UI	[CREV-472] - [Bug - CSS] - Zero results in mobile has overlapping elements
Reports	[CREV-597] - [Enrollment status report] - The exported .csv Enrollment status report displays "true" value as 1 and false value as blank
Welcome Email	[CREV-678] - [Prod also (IE): Welcome email] Need to refresh the welcome email in communication to see all the elements aligned.
UI	[CREV-709] - [Bug-CREV-2]: User not loading automatically in IE and in iPhone/iPad (with Safari browser)
UI	[CREV-679] - [Mobile View] - "Inactive" button on module list is not aligned in mobile view
UI	[CREV-691] - [Admin Tool - Events] - Preview icon overlaps with event pills
Linked Profile Field on Registration Page	[CREV-442] - [BUG-CREV-158]: Global Search doesn't filter results for 1 & 2 letter search strings
Tags	[SWE-2901] - [Categories widget] when merging or deleting tags those tags are not changed if on categories widget
UI	[SWE-2917] - [Connect Page]- Adding a page on Connect page has additional empty block
UI	[SWE-2922] - [Module] Searched module does not show @work or NEW flag on it

Component	Enhancement Description
Internationalization	[SWE-2933] - [I18n Search results] Searching for the same keyword gives different results when language changes
Internationalization	[SWE-2943] - [IE 11 Badge widget Globe Icon] Globe icon is cut in half
Internationalization	[SWE-2945] - [MLCC in Link] Link Text is missing global icon
Roles	[SWE-2948] - [System Role] when there are 0 publishers/ instructors the number sometimes doesn't show
Internationalization	[SWE-2950] - [News article widget] Missing Globe icon for Title and Article body
Reports	[SWE-2966] - [Enrollment status report] - The exported .csv Enrollment status report displays "true" value as 1 and false value as blank
Internationalization	[SWE-2982] - [i18n] - On eco_homework.php page, "Translation" link appears for the current user comments, upon changing language
Internationalization	[SWE-3023] - [i18n][IE11] - Changing tabs in IE11, updates user's preferred language to English
Internationalization	[SWE-3027] - [IE11,mobile Language selector] Text is outside of box
Internationalization	[SWE-3029] - [Test Player] Sidebar settings displays untranslated text
Internationalization	[SWE-3044] - [I18n Media] Media title and description are missing global icon/translation
Internationalization	[SWE-3054] - [i18n, Learner Tool] Some date formats still formatting for "en_US"

Figure 23 – Outstanding Enhancements Table