WISETAIL RELEASE NOTES
Q4.2020.2

COMPILED BY
Wisetail Product Management Team

DATE
16 November 2020

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

Q4.2020.2 RELEASE NOTES

Release Goals/Themes

The key business objectives achieved in this release are:

- Enhancements to Daily Checklists Tool
- Module Duration/Time Credits value to Modules
- Enrolment subscription and change email notifications
- @Work content setting feature consolidation
- Leaner tool global media search enhancements
- Observation checklist widget enhancements
- Wisetail footer addition with data privacy link access
- Terms and Conditions access from registration page
- User Transcript report enhancements
- Multi-Module Complete Report (MMCR) enhancements
- Admin role based controls for test attempt notifications

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 from scratch.

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.

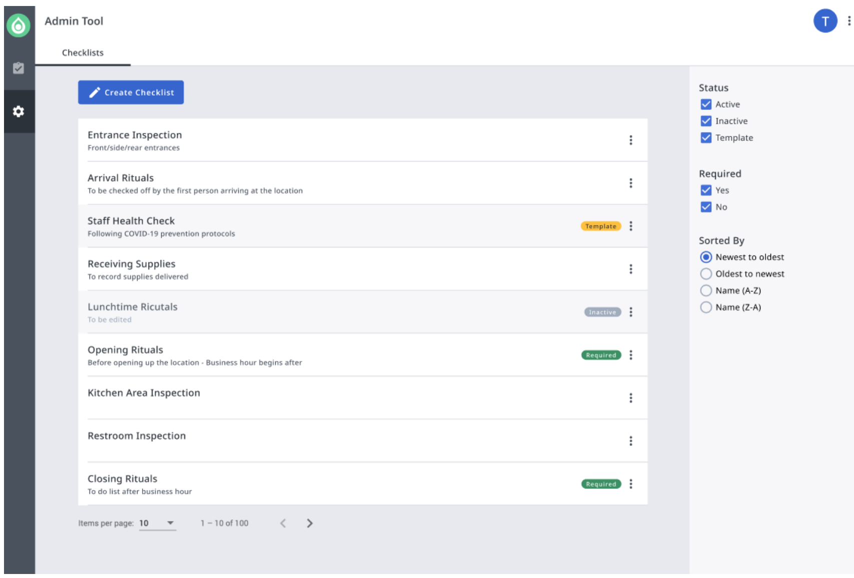

Figure 1 – Admin Tool – Home Screen

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

Create a Checklist

The “Create Checklist” button redirects Checklist Admins to an easy to use step-by-step process of creating a Checklist:

1. At minimum a Checklist Name is required to create a checklist.
2. After providing a Checklist Name, additional buttons become enabled:

    a. “Checklist Description” will help Checklist Admins identify Checklists especially when Checklists have similar names.
    b. “Instructions for User”, are optional instructions that appear on top of the Checklist when it is being fulfilled by Checklist User.
    c. Enable Scoring will display the Average Score Metrics on Daily Checklist’s Insights tab.
    d. The “More Options” button provides additional buttons, “Preview”, “Save & Close”, and “Delete Checklist”.

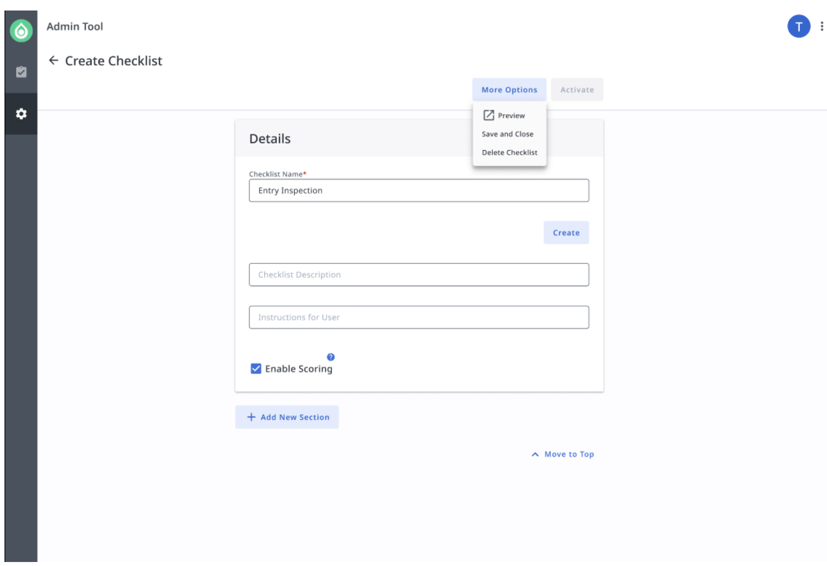

Figure 2 – Admin Tool – Create Checklist

3. To continue the checklist creation process click on Add New Section to add the questions and response part of the checklist.
4. To save changes made, click “Save & Close” to go back to the List of Checklists.
5. Checklist Admin can Preview Checklist to view how the Checklist would appear to Checklist Users.
6. Once all the sections have been added, clicking on the “Activate” button will make the Checklist available to Checklist Users.

Edit a Checklist

1. To edit a Checklist, Checklist Admin selects an existing Checklist.
2. Changes can be made to Checklist Name, Description, Instructions for User, Enable Scoring, and Add / Edit / Remove any section.
3. Clicking the "Save & Close" button will save changes and redirect to the List of Checklists.
4. If Checklist Admin forgets to save changes and attempts to go back to the List of Checklists, an Alert Prompt will be displayed.

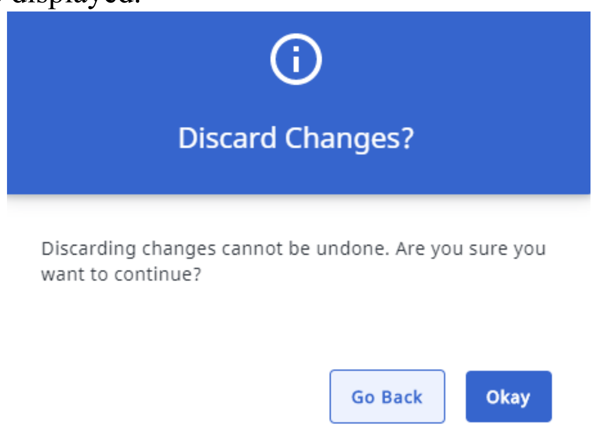

Figure 3 – Admin Tool – Discard Changes Alert Prompt

5. "Go Back" to cancel discarding changes or to click on "Okay" to confirm discarding changes.

6. Checklist Admin can also Preview, Delete, or Activate Checklist.

Add New Section

A Checklist can be constructed from Checklist Sections. Each Checklist Section allows for a combination of various types of entries.

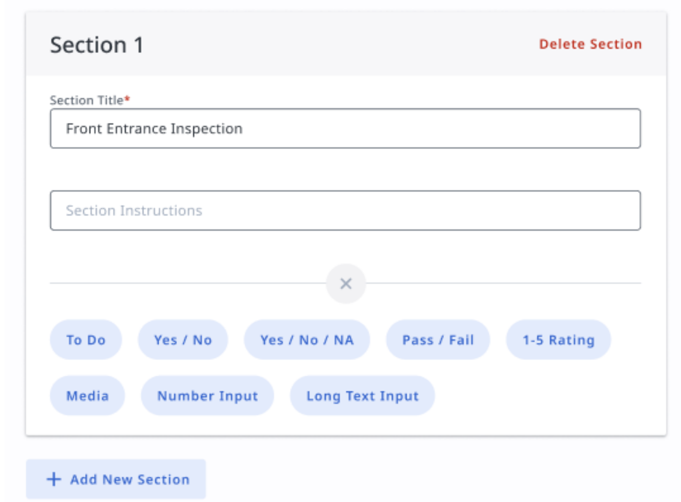

Figure 4 – Admin Tool – Create/Edit Checklist - Add Section

- Each Section must have a Name and optional Instructions.
- Each Section can have one or more Entries.
- Each Entry has one or more possible answers.
- Checklist Admin can add an Entry then provide an Entry Name.
- Entries can be duplicated, deleted, or be required/optional.

Delete a Section

1. Checklist Admin can delete a section by clicking on the “Delete Section” button.
2. If the “Delete Section” was clicked during creation of a Checklist, then the alert prompt displayed will be “Deleting this section cannot be undone. Are you sure you want to continue?”
   a. Clicking on “Cancel” will not remove the section.
   b. Clicking on “Delete” will remove the section.
3. If the “Delete Section” was clicked during editing of a checklist, then the alert prompt displayed will be “This section will be permanently deleted once you update the change. Are you sure you want to continue?”
   a. Clicking on “Cancel” will not remove the section.
   b. Clicking on “Delete” will remove the section.

Activate a Checklist

1. Checklists that have been duplicated, created or edited can be Activated.
2. To Activate a Checklist, the “Activate” button should be clicked.
3. An alert prompt will display: “If you activate, this checklist will be available to users right away. Are you sure you want to continue?” To cancel activation, the user must click the “Go Back” button, to confirm activation, the user must click, “Okay” button.
4. An Activated Checklist will have an “Active” status.
5. An Activated Checklist will cause a Checklist to become available to Checklist User’s Planner as a Checklist.
6. All Active and Non Required Checklists will be available on the “Add More Checklists” list of checklists on Checklist User’s Planner.
7. If the Checklist Admin no longer wishes to use an Active Checklist, it can be deleted through Delete Checklist when creating or editing a Checklist.

Update an Active Checklist

1. Activated Checklists can be updated by clicking on the “Update” button on the Edit Checklist page.
2. After clicking on “Update”, an alert prompt displays, “If you update this checklist, your change will be effective immediately. Are you sure you want to continue? To cancel the update, the user can click on the “Go Back” button or to confirm the update, the user can click on the “Okay” button.

Preview a Checklist

1. The Checklist Admin can select to Preview a Checklist either when creating or editing a Checklist.
2. The Preview enables Checklist Admin to view the Checklist as Checklist User would see it.
3. If the Checklist has not been activated, it can also be activated by clicking on the “Activate” button.
4. Checklist Admin can exit preview mode, by clicking on the “Close” button which will then take the user back to the previous page he/she came from.

Delete a Checklist

1. Checklist Admin can delete a Checklist either from the Create or Edit Checklist.
2. Click on Delete Checklist will display an alert prompt: “Deleting this checklist cannot be undone. Are you sure you want to continue?”. Checklist Admin can then “Go Back” or confirm Delete by clicking on “Okay”.
3. Deleting a Checklist will remove it from the List of Checklists.
4. When a Checklist has been deleted, it will no longer appear on the “Add More Checklists” list on Checklist Planner. All “Not Started” copies will also be removed.

Duplicate a Checklist

1. Checklist Admin can duplicate an Active checklist by opening it first.
2. Checklist Admin clicks on the “More Options” button and then selects “Duplicate Checklist”.
3. A copy of the checklist will be created and displayed. Checklist Admin can then Activate, Preview, Edit, or Delete the newly duplicated checklist.

Create Checklist from Template

1. Templates are pre-made Checklists that are made available with every install of the Daily Checklists tool.
2. Currently there are several templates available on the Templates tab.
3. To create a checklist from a template, Checklist Admin clicks on the “vertical 3 dots” menu and then clicks on the “Duplicate” button.
4. Checklist Admin, can also select, “Preview” to view how the checklist would look like on the fulfillment side of the app and then click on the “Duplicate” button to create a copy from it.
5. The newly created checklist will be opened in Create Checklist mode and can be edited.

Checklist Planner, History, & Insights

Planner

Checklist User Navigates from LMS to Daily Checklists through the Single Sign On and will land on Checklist Planner tab.

In LMS’s User Profile fields, 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.

Submit a Checklist

1. A Checklist is made up of one or more Sections, A User Notes field, a Consent checkbox, and a “Submit” button.
2. Each Section has multiple entries where only certain types of answers are possible.

    a. A To-Do List - has a checkbox that when clicked, indicates that an entry is Done.

    b. A Yes/No - has a toggle button that only allows either a “Yes” or a “No” answer.

    c. A Yes/No-N/A - has a toggle button that only allows either a “Yes” or a “No” or an “N/A” answer.

    d. A Pass/Fail - has a toggle button that only allows either a “Pass” or a “Fail” answer.

    e. A 1-5 Rating - allows for selection of 1, 2 , 3, 4, or 5.

    f. Media - allows for one or more Photos to be added.

    g. Input Number Field - allows for a four digit number and an additional two decimal places to be entered

    h. Long Text Field - allows for up to 500 characters of text to be entered

3. An Checklist User must check the Consent checkbox before being able to click the “Submit” button.
4. The system validates that all required entries have been entered/selected before allowing for submission of the checklist.
5. Clicking on the “Submit” button, the Checklist will be put in Completed Status and can no longer be edited. It will also display a Snackbar UI control with the message, “Congrats! This checklist is now complete!”
6. Checklist History will display the username, location, date and time when the Checklist has been Submitted.

Remove a Checklist

1. A Checklist User can remove a checklist through the Planner by clicking on the “vertical 3 dotted” icon displayed on checklists. When clicked it will display a drop down called “Remove”.
2. Removed Checklists cannot be recovered. Completed or Required Checklists cannot be removed.

View History of Checklists

1. Displays a Date Range selector, an empty list, and a Filter button.
2. Checklist User must select a Date Range to display a list of past checklists. Past checklists cannot be edited.
3. All Checklists will display based on the most recent modified date to the last modified date that were:
    - “Not Started”
    - “In Progress”
    - “Completed”

4. Checklist User can also click the Filter button to display one or more of the following options:
    - “Not Started”
    - “In Progress”
    - “Completed”

5. Checklist User can Sort the list by:
    - Newest to Oldest order
    - Oldest to Newest order
    - Alphabetically by Name in Ascending order
    - Alphabetically by Name in Descending order

View a Past Checklist

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.

Insights

Checklist Insights display metrics on Required Checklists that were completed on the Planner tab. It also displays the Average Score of all Checklists that had Scoring Enabled.

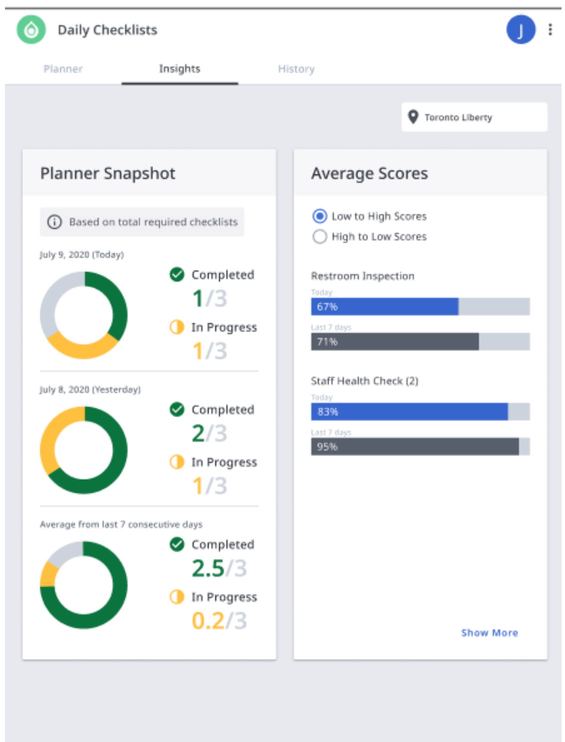

Figure 6 – Fulfillment - Insights

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.

1. Completions Today

   - Will display Required Checklists that are In Progress today out of the total number of Required Checklists for today.

   - Will display Required Checklists that were Completed today out of the total number of Required Checklists for today.

2. Completions Yesterday

   - Will display Required Checklists that were In Progress yesterday out of the total number of Required Checklists yesterday.

   - Will display Required Checklists that were Completed yesterday out of the total number of Required Checklists yesterday.

3. Completions Average Last 7 Consecutive Days

   - Average Last 7 Days is the average of open days where there is a checklist value greater than 0.

   - Will display Required Checklists that were In Progress the last 7 days out of the average number of total bookmarks during the last 7 days.

   - Will display Required Checklists that were Completed the last 7 days out of the average number of total bookmarks during the last 7 days.

   - Results might get skewed if closed days fall within the last 7 days as there are no checklists completed on those days.

Average Scores

The system must follow the 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. % completion is determined by the total number of points divided by the total number of entries in each checklist.
4. Checklist User change display order to Show Low to High Scores completed for today and last 7 days avg.
5. Checklist User change display order to Show High to Low Scores completed for today and last 7 days avg.
6. Shows 7 days avg when it hits 7 days, don't show it if the checklist has less than 7 days.

Checklist Scoring Mechanism
The system should have a scoring mechanism that helps determine % complete rating of checklists so they can be displayed in the insights tab for Checklist Users.

- To Do Checklists -> Assigns 1 point to each response that has been completed.
- Yes/No -> Assigns 1 Point to each response that has a "Yes" selected.
- Yes/No/N/A -> Assigns 1 Point to each response that has a "Yes" selected.
- Pass/Fail -> Assigns 1 Point for Pass.
- Rating 1-5 -> If an answer is selected, then it is assigned 1 Point.

Add all points together from all sections then divided by total number of line items then multiplied by 100 to get a % value. That % value is the % complete for that checklist.

History

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

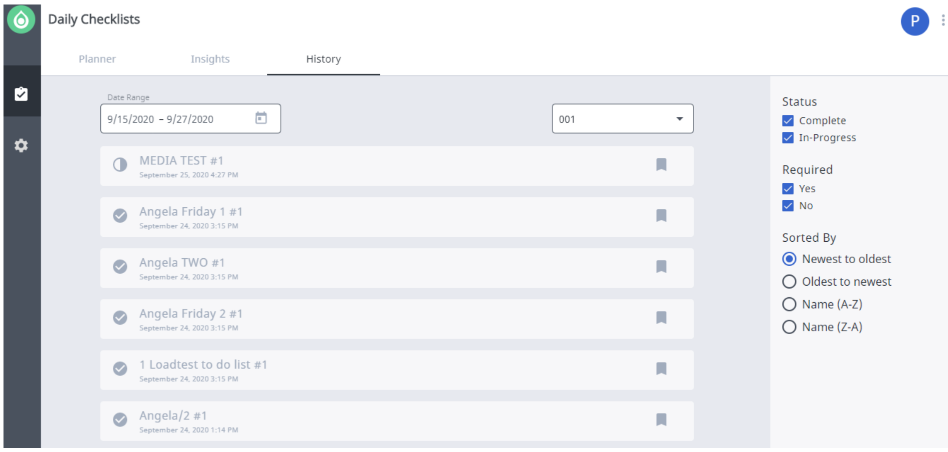

Figure 7 – Fulfillment - History

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.

Actions

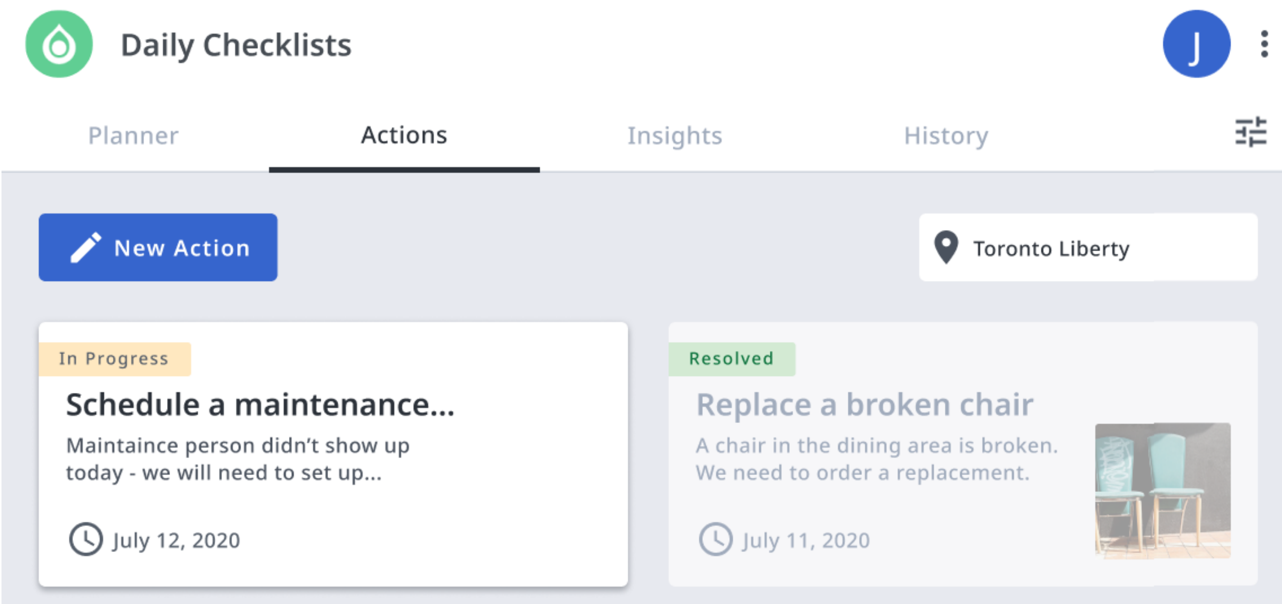

Figure 8 – Fulfillment – Actions

View Actions

Unplanned things happen all the time. Checklist Users may want to be alerted to something that needs attention and track that it has been completed. These Actions may or may not be related to Checklists.

There are 3 types of Actions that can be created:

1. Actions that are independent from Checklists, this is called "Action".
2. Actions that are related to Checklists are called "Checklist Actions"
3. Actions that are related to negative entry responses on Checklists are called "Corrective Actions".

The "Actions" tab displays all 3 types of actions that have been created sorted by Overdue Actions first which are actions that missed their due date to the ones that are upcoming in the future.

Checklist Users can use the filters on the right side of the screen.

Filter by Due Date Range
To change the Due Date Range to filter the Actions by Due Date. The date range selected can be 31 days excluding today. Up to 2 years of historical data will be available to allow Checklist Users to view past Actions.

Filter By Status
By default Open and In Progress Actions will be checked. Resolved Actions are not displayed by default as this is unchecked in the filter.

Filter By Type
The list of Actions can be filtered to display Actions, Checklist Actions, or Corrective Actions.

Checklist Permissions
Checklist Admin can set who the Audience of a Checklist are. To do so, Checklist Admin can set Checklist Permissions.

Checklist Creation / Update
Checklist Admins can set audiences that should be able to access and fulfill checklists by clicking on Checklist Permissions. Clicking Checklist Permissions will open the Rules page.

Checklist Admin can click on "+ Rule" to add a new rule to the Rules page. Clicking on "+ Rule" should open a modal window that allows for selection of appropriate permissions.

Module Duration/Time Credits

Overview

A simple way to assign an amount of time to a module has been created. Similar to the way a points value can be applied to a module, a course duration/time credit can now be set on a module as well. This is **not** actual time tracking in the application.

Reports have also been enhanced to provide details on the cumulative amount of time associated with completed modules on both an individual level, and for a group of leaners.

This time credit information might be used to demonstrate numerically how much training an learner or learner group may have accomplished or used to determine reward structures.

Module Requirements

Time credits can **only** be applied to modules that meet the following requirements:

- Standard module (not reference module)
- Does **not** contain another module (not a parent module)

Module Settings Changes

To set a course duration/time credit value on a module, a "Module Time Credit" section has been added to the "Settings" panel on the module details page. This section is visible and editable directly in the "Settings" panel, independent from the Settings Preset/Custom Settings modal.

The default setting is 0 hours, 0 minutes and values can be added by whole numbers (minutes: 0-59, hours: 0-99)

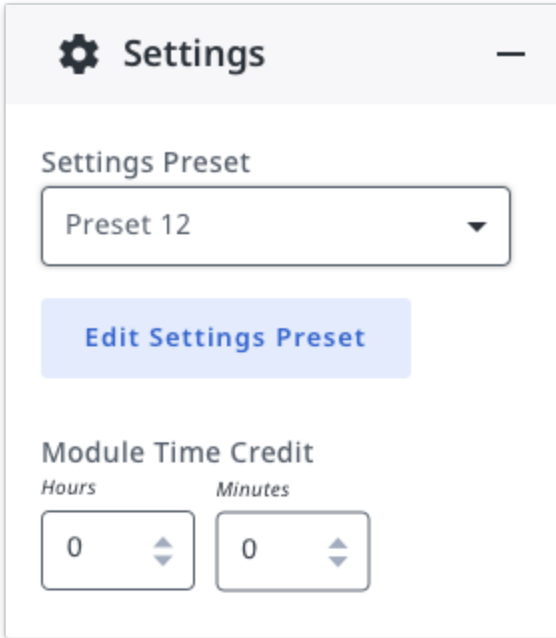

Figure 9 – Admin Tool – Module Settings

Reporting Enhancements
Two columns have been added to the existing "Module Completions Report": *Total Time Credits* and *Module Time Credit*.

- *Total Time Credits***:** This column displays the cumulative value of the modules completed for a user during a specified period of time.
- *Module Time Credit:* This column displays the time credits associated with each of the user's completed modules.

Users

25 Items | Export CSV

	Last Name	First Name	# of Module Completions	Total Time Credits
	Anderson	Philip	2	2 hours 30 minutes
	Bacaj	Jason	3	2 hours 15 minutes
	Barbula	Lucas	2	2 hours 0 minutes
	Dalton	Lana	7	5 hours 30 minutes
	Dusenberry	Kayla	3	2 hours 30 minutes
	Edwards	Jonathan	7	5 hours 30 minutes
	Rempel	Willis	3	2 hours 30 minutes

Module Title	Date	Module Time Credit
My Cool Module 1	2019-11-07	1 hours 0 minutes
My Cool Module 2	2019-11-07	0 hours 30 minutes
My Cool Module 3	2019-11-07	1 hours 0 minutes

Figure 10 – Admin Tools – Reports – Module Completions Report

Enrolment Subscription and Change Email Notifications
The notification emails for enrolments have been improved by now further allowing the super admin to allow notification emails to be sent for two additional scenarios:

- When a learner user is initially subscribed to an enrolment
- When there are any changes made to an active enrolment

The notification emails will be sent to the audience of the enrolment only.

These additional settings can be found by the Super Admin under:

Admin Tool > System Settings > All Notifications

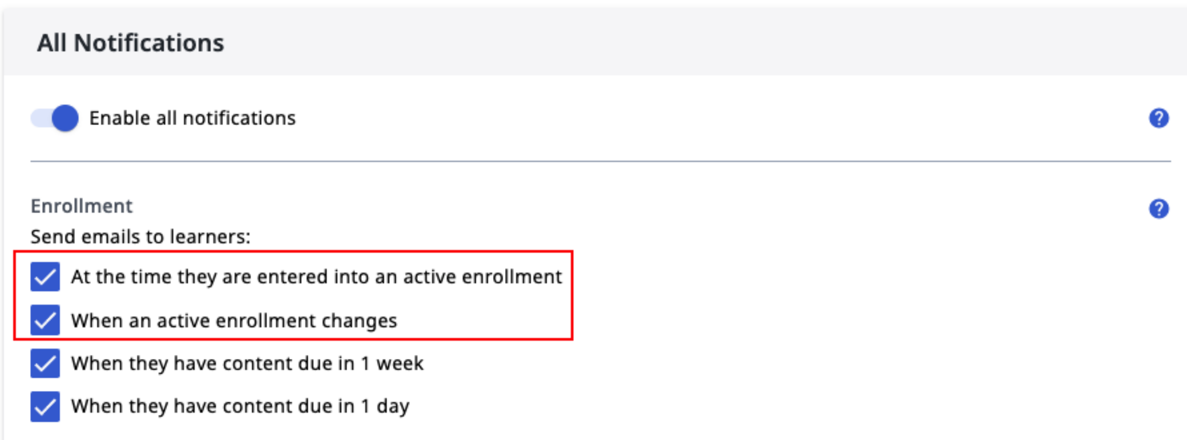

Figure 11 – Admin Tool - Enrolment Notifications Settings

Below is a list of actions that will trigger the sending of the emails for each setting:

- *At the time they are entered into an active enrollment* will be triggered when:
  - A new enrolment is activated
  - A new user is added to an active enrolment
  - A new audience is added to an active enrolment

- *When an active enrollment changes* will be triggered when:
  - A due date changes
  - Module(s) is/are added to an enrollment
  - Module(s) is/are removed from an enrolment

@Work content setting feature consolidation
The setting to enable/disable the Filter @Work option has been moved to *Admin Tool > System > @Work*. Furthermore, the following workflows have been developed to simplify the accessibility of the Filter @Work option;

When the filter @Work setting is disabled, the Super Admin cannot add/edit/remove any new or existing IP addresses.

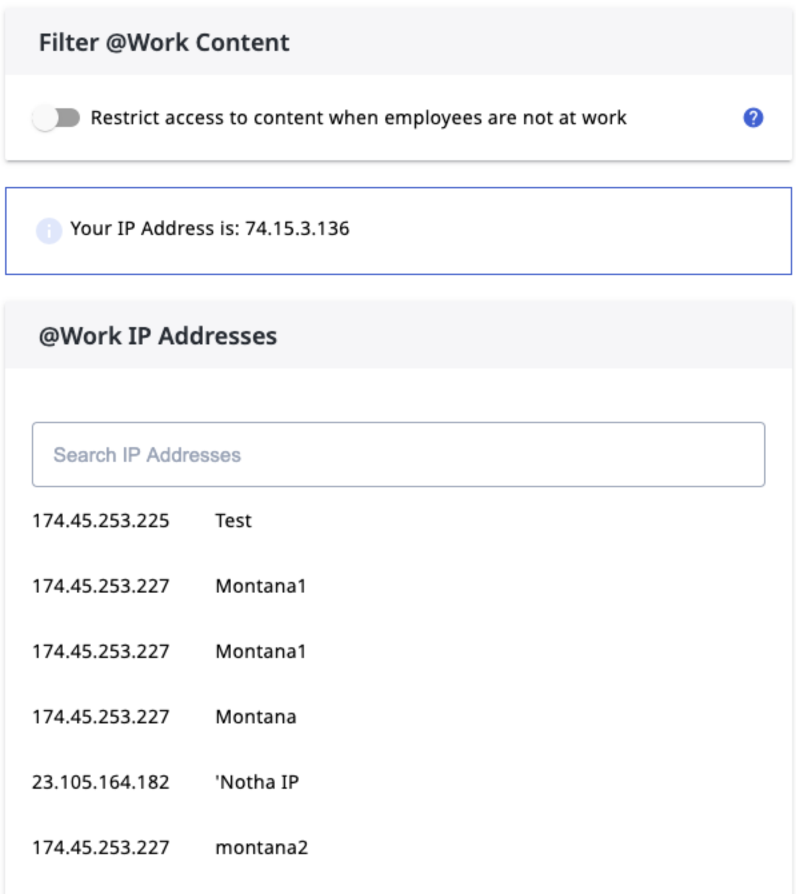

Figure 12 – Filter @Work – Disabled @Work Filter Content

Should a partial admin navigate to *Admin Tool > Modules > Modules > [choose a specific module]*, on the right hand side they should no longer see the *At Work* side panel since the filter @work content setting has been disabled

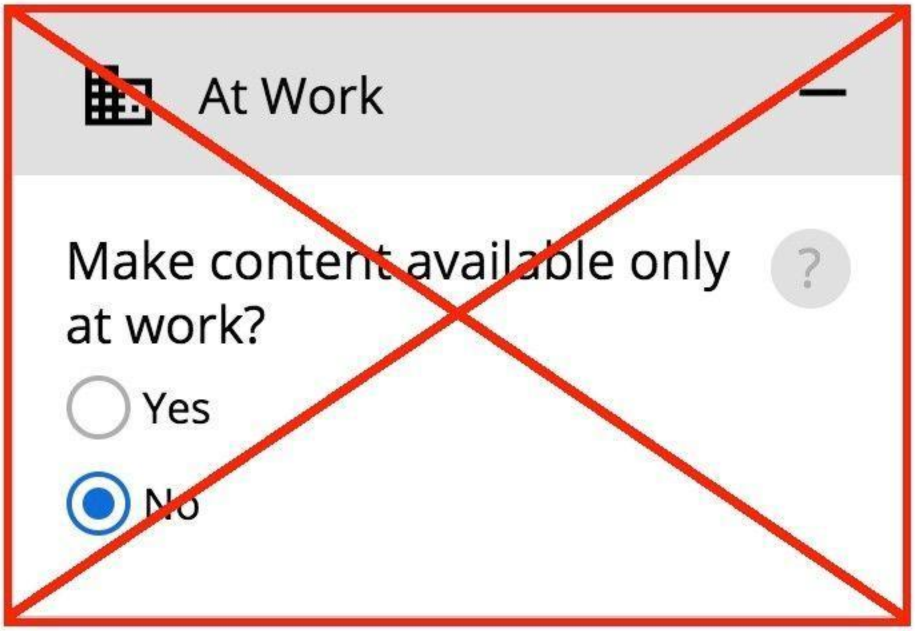

Figure 13 – Partial Admin - Filter @Work side panel hidden

Should a super admin navigate to *Admin Tool > Modules > Modules > [choose a specific module]*, on the right hand side they will see a variation of the *At Work* side panel informing them that the filter @work content setting has been disabled and providing options to proceed to the setting to enable it (if needed).

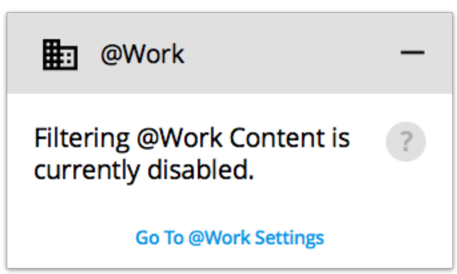

Figure 14 – Super Admin - Filter @Work side panel displayed

Upon selection of the *Go To @Work Settings* link in the *At Work* side panel, the super admin user will be redirected to the *Admin Tool > Settings > @Work* pill. From here the super admin user will see the same interface as they normally would when navigating to this location. The only addition will be a link at the top of the page providing the super admin user with a back button to return to the module that they had originally launched from. The link will indicate *go back to module*.

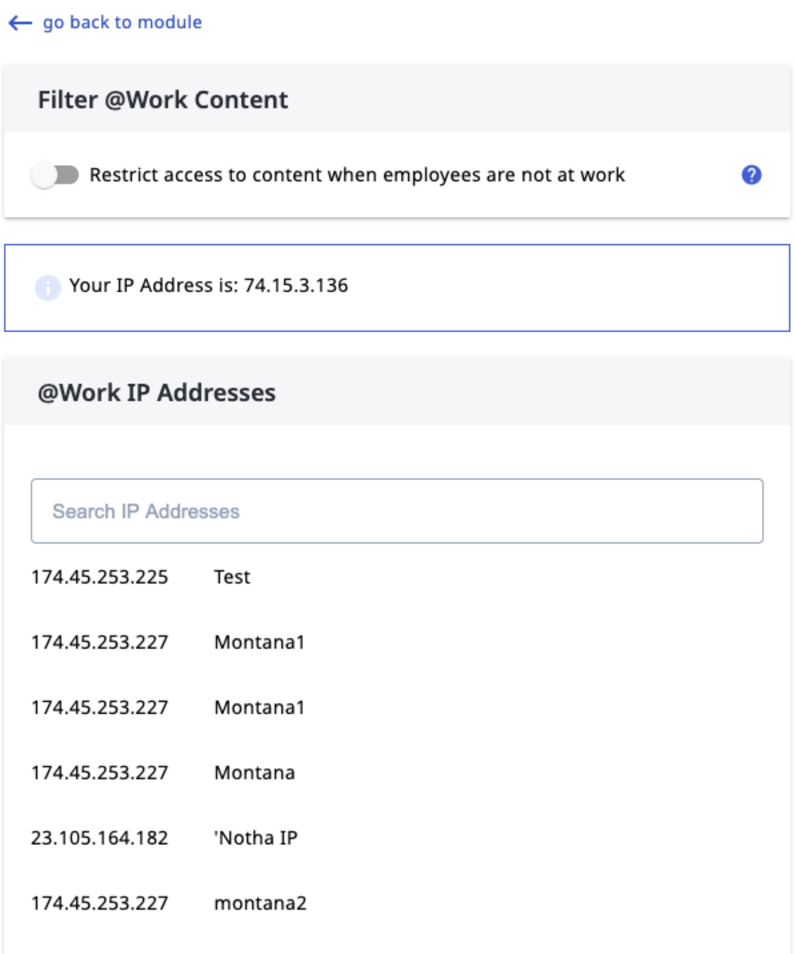

Figure 15 – Filter @Work – Navigating to @Work Filter Content Setting from Module Details

When the filter @Work setting is enabled, the Super Admins can add/edit/remove any new or existing IP addresses.

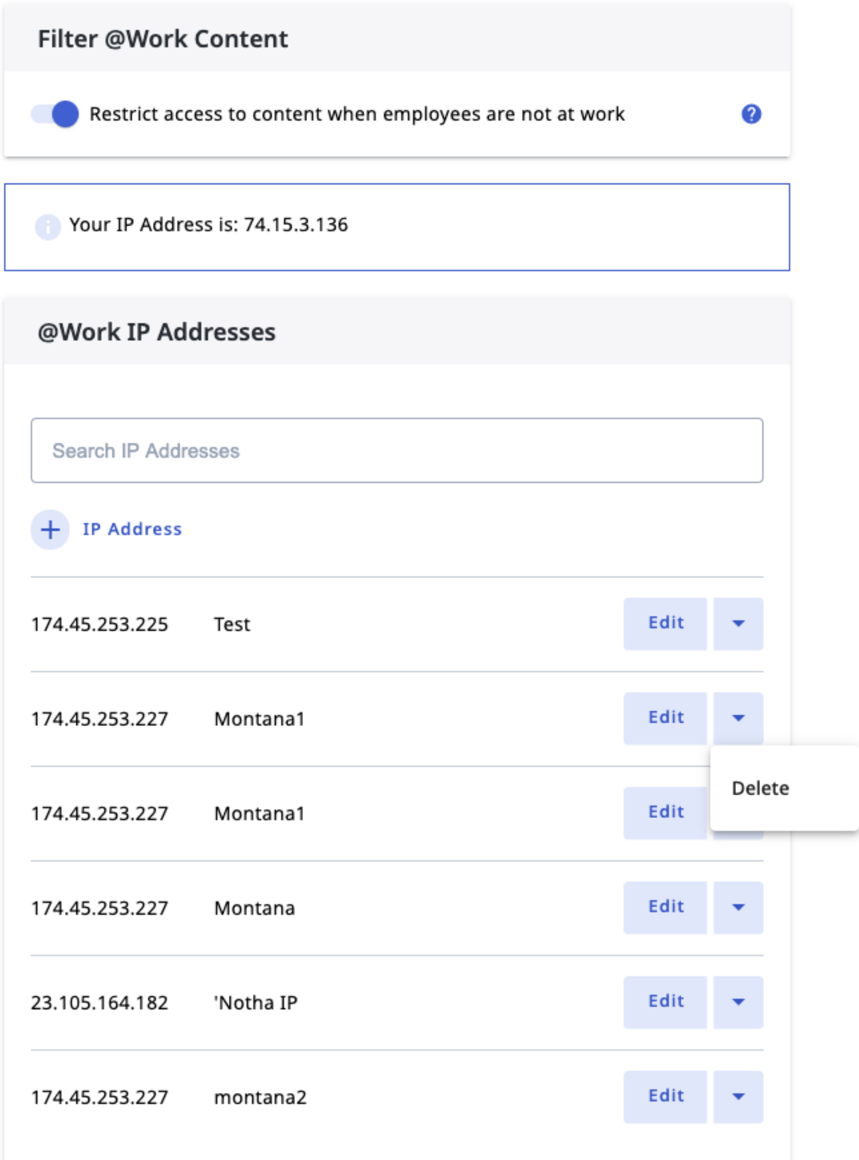

Figure 16 – Filter @Work – Enabled @Work Filter Content

Should a partial admin or super admin navigate to *Admin Tool > Modules > Modules > [choose a specific module]*, on the right hand side they should see the *At Work* side panel since the filter @work content setting has been enabled

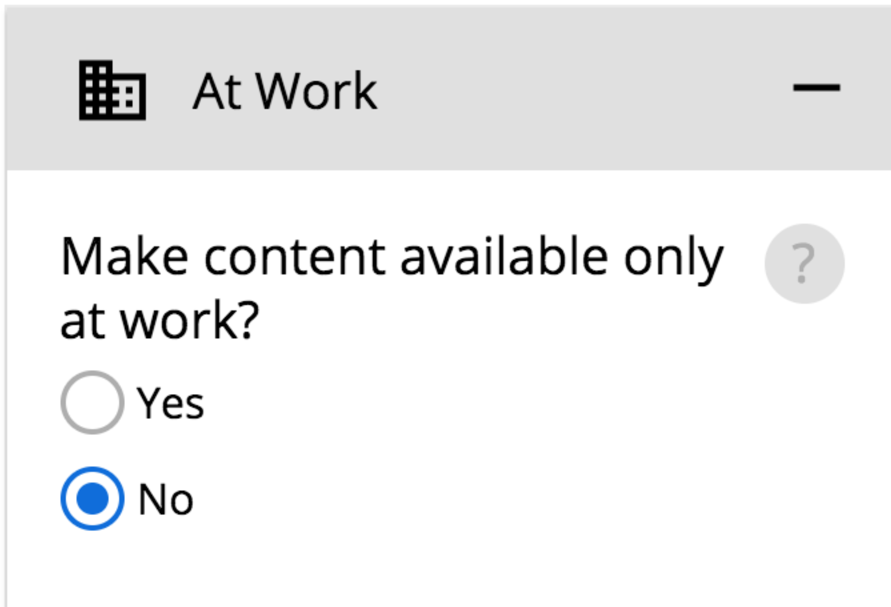

Figure 17 – Partial/Super Admin - Filter @Work side panel displayed

A message will be displayed indicating *No work IP addresses defined. Users will not have access to @Work content.* If the following scenarios occur:

- Filter @Work content setting is being enabled AND there are no work IP addressed defined.
- Filter @Work content setting is enabled AND there is only one IP address defined that has been deleted.

The message *No work IP addresses defined. Users will not have access to @Work content.* will be hidden if the following scenarios occur:

- Filter @Work content setting is being disabled when it was previously enabled and had no IP addressed defined.
- Filter @Work content setting is enabled AND the first new IP address has been defined.

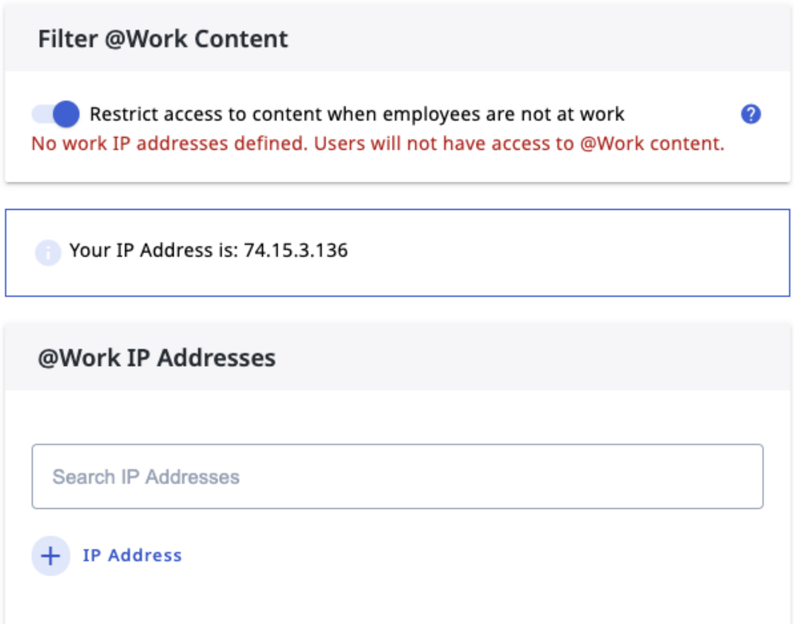

Figure 18 – Filter @Work – No Work IP addresses defined message

Leaner Tool Global Media Search Enhancement

The initial release of the Learner Tool Global Search was limited to display user-contributed media results only as a user-contributed module result under the user-contributed search results section. The limitation with this path was that any user-contributed media item that may have had its *Title* or *Description* adjusted, could not be found anymore since the *Title* and *Description* of the user-contributed media no longer matches that of the corresponding user-contributed module. Hence, the search result for the user-contributed media would not be found nor displayed.

With the new functionality, changing the user-contributed media *Title* or *Description* will still result in the user-contributed media being located as a result under the media search results section.

The learner tool global search will display results, under each results section, based on the search term match for each of the following fields. Please note the changes in green.

Module Results Section

- Module Title
- Module Description
- Module Tags (when explicitly choosing a Tag from the *Module Tag Results* section on the right-hand side panel)

Media Results Section

- Media Title

- Media Description
- User-Contributed Media Title
- User-Contributed Media Description

User Contribution Results Section

- Module Title
- Module Description
- Module Tags (when explicitly choosing a Tag from the *Module Tag Results* section on the right-hand side panel)
- User-Contributed Module Title
- User-Contributed Module Description

Community Results Section

- User First Name
- User Last Name
- Username

Observation Checklist Widget Enhancements

When a user logs into the learner tool and proceeds to their *Observation Checklist* widget, they will note that the widget now no longer displays users that are currently in inactive state. This will now provide a more focused and targeted list of users for whom an observation checklist walkthrough needs to be executed.

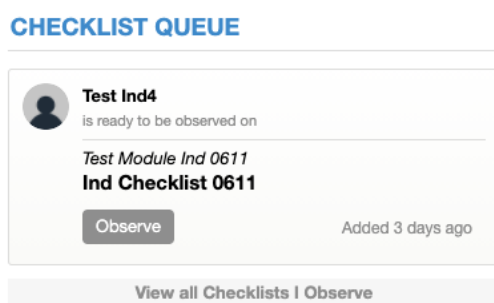

Figure 19 – Observation Checklist Queue displaying only Active Users

Wisetail Footer Addition with Data Privacy Links

With Wisetails focus on managing data privacy, the LMS now offers a static footer for both the Learner and Admin tools.

The footer for the admin tool will contain:

- The new Wisetail logo
- A link to the Wisetail General Data Processing Agreement
- A link to the Wisetail Data Policy

Figure 20 – Admin Footer

The footer for the learner tool will contain:

- A link to the Wisetail General Data Processing Agreement
- A link to the Wisetail Data Policy

Figure 21 – Learner Footer

The *Powered by Wisetail* tab is no longer present on the learner tool

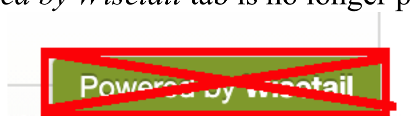

Figure 22 – Removal of Powered by Wisetail Tab

Selection of the *Wisetail logo* from the admin tool, will result in the launch of a new browser tab/windows and will navigate the user the Wisetail Home Page (www.wisetail.com)

Terms and conditions access from registration page

Further enhancements have also been added to the registration page where a user can now access the Terms and Conditions as well as the Privacy Policy without the need to login to the system. This will allow new users that wish to register the ability to view your terms and privacy policy prior to creating an account.

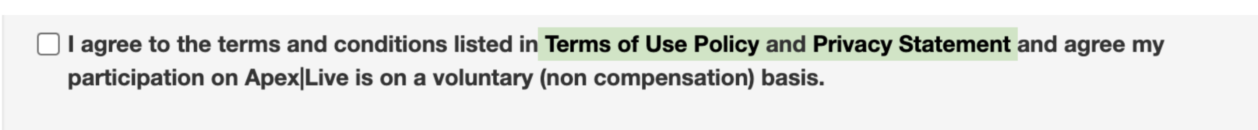

Figure 23 – Registration Page Term and Privacy Links

Once one of the links have been selected, a modal within the current window, will launch and display your current Terms of Use and Privacy Statements

Figure 24 – Term and Privacy Statement Modal on Registration Page

User Transcript Report Enhancements

One of the report enhancements is to the user transcript report which now permits the admin user to choose which module type they wish to include/exclude when generating the preview and the csv export for the user transcript report.

The User Transcript Report setup now includes a multi-select checkbox option that allows the admin user to choose from the following module types:

- Standard Modules (selected by default)
- Reference Modules (selected by default)
- User Contribution Modules (deselected by default)

Upon selection of the module types, the preview generated will also update to display the appropriate data generated.

Furthermore, there is now a *Module Type* column (between the *Title* and *Viewed* columns) available for the admin user to leverage in order to easily determine which type of module was completed by the user. One of the three module types mentioned above is also displayed as an entry in this newly added column.

The *Module Type* column is available by default and cannot be removed as part of the *Manage Columns* functionality.

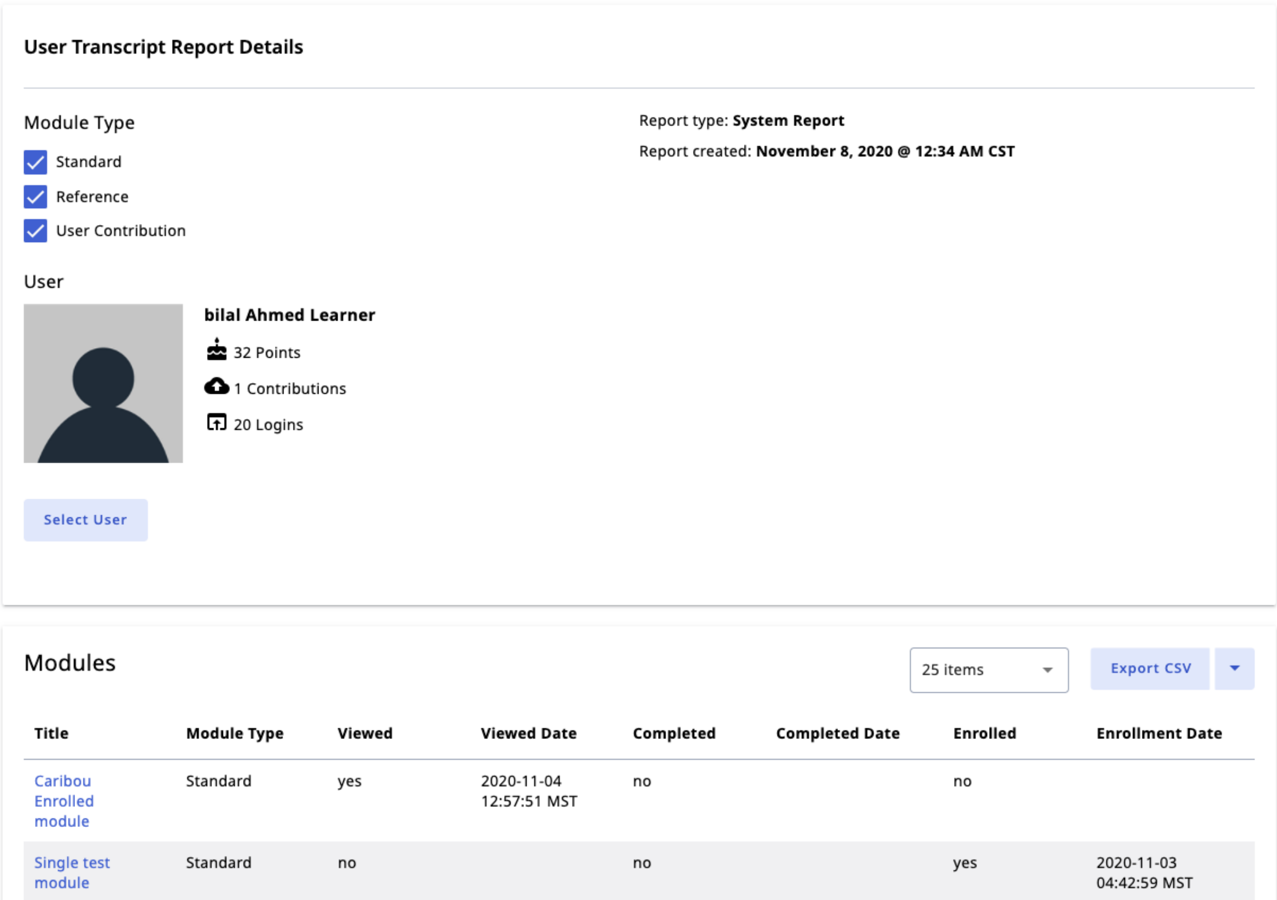

Figure 25 – Module Type Checkboxes & Module Type Column

The same column, and its associated data, is also available in the csv export for consistency between the preview as well as the exported data.

User Transcript Report	Date: 2020-11-07 23:35:13 MST						
Module Title	Module Type	Viewed	Viewed Date	Completion	Completion Date	Enrollment	Enrollment Date
Caribou Enrolled module	Standard	yes	2020-11-04 12:57:51 MST	no		no	
Single test module	Standard	no		no		yes	2020-11-03 04:42:59 MST
Test Module 1103_Single Q Single S	Standard	no		no		yes	2020-11-03 06:25:00 MST
Doggy	User Contribution	no		no		yes	2020-11-03 10:39:29 MST

Figure 26 – Module Type Column in CSV Export

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Multi-Module Completion Report (MMCR) Enhancements
The MMCR will also benefit from a few key updates to allow admin users to more promptly obtain the data they require. These changes include

- The addition of a *Report On* option with a single select radio button selection that has the following two sub options:
    - *All Users With Access* (Includes Enrolled Users) > Will display users with access to module OR are part of an enrolment with the module OR both
    - *Enrolled Users Only* > Will display users that are part of an enrolment with the module **ONLY**
- *User Status* option with a multi-select check box button selection that has the following two sub options:
    - *Active Users* > Will display **ONLY** users that are currently with Active status
    - *Inactive Users* > Will display **ONLY** users that are currently with Inactive status

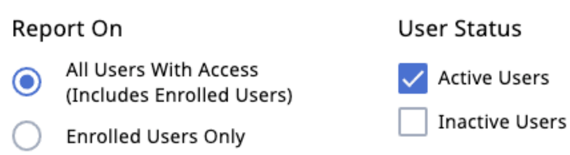

Figure 27 – MMCR – Report Setup Filters

The UI Preview will be updated to show stats on *Users with Access* or *Users Enrolled,* as well as their active status, depending on the selection made:

Report On **Selection**	***User Status*** **Selection**	**Completion Stats UI Preview and CSV export**
All Users with Access	Active	Display completion stats for all users that are active **ONLY**
All Users with Access	Inactive	Display completion stats for all users that are inactive **ONLY**
All Users with Access	Active and Inactive	Display completion stats for all users that are active and inactive **ONLY**

Report On **Selection**	***User Status*** **Selection**	**Completion Stats UI Preview and CSV export**
All Users with Access	None selected	Display completion stats for all users that are active and inactive **ONLY**
Enrolled Users Only	Active	Display completion stats for enrolled users **ONLY** that are also active
Enrolled Users Only	Inactive	Display completion stats for enrolled users **ONLY** that are also inactive
Enrolled Users Only	Active and Inactive	Display completion stats for enrolled users **ONLY** that are also active and inactive
Enrolled Users Only	None selected	Display completion stats for all users that are active and inactive **ONLY**

Figure 28 – MMCR – Filter Based UI Preview

The list of users generated and displayed on the UI will also be updated based on the selection of the filters.

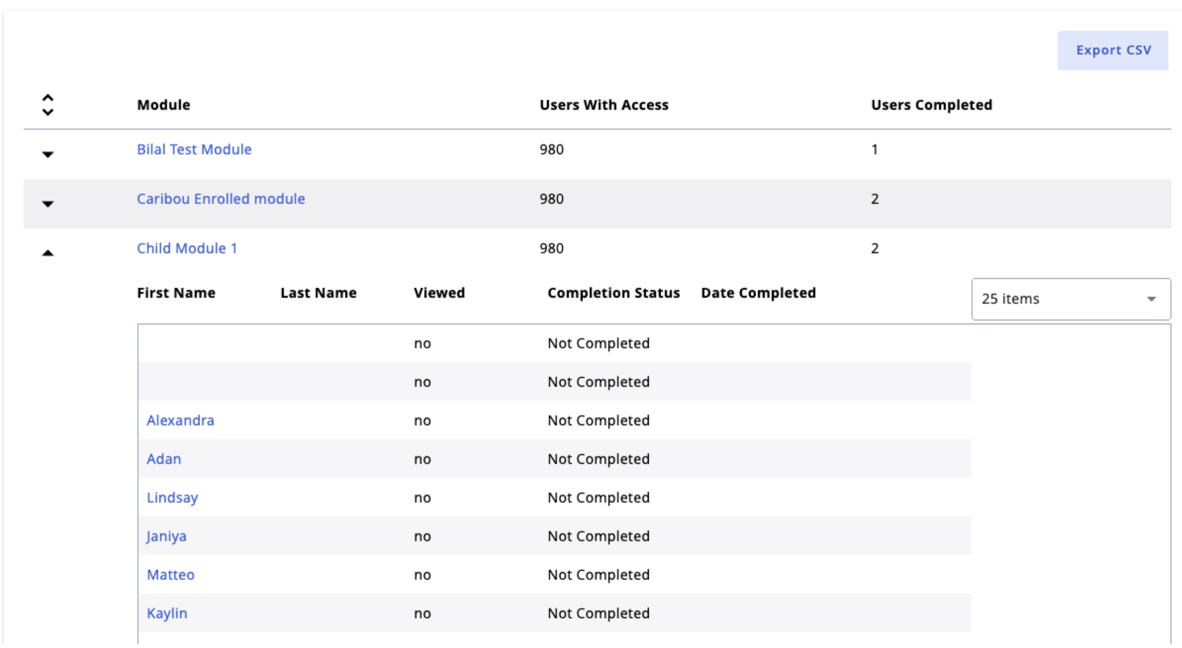

Figure 29 – MMCR – Filter Based Report Preview

The data generated in the csv export will be updated based on the filter selections.

For the MMCR CSV export **ONLY**, the data columns will be changed:

- The Modules summary section at the top of the export will continue to show *users_with_access* and *users_completed* for each module **but** they will show numbers reflective of the filtering selection made in the report setup.

- Two more columns will be added to the users section of the data. These columns will be:

    - *user_status* that will be displayed between *first_name* and *module* columns AND will display either *Active* or *Inactive*

    - *enrolment_status* that will be displayed between *completion_status* and *date_complete* columns AND will display either *yes* or *no*

Multi Module Completions Report	Date: 2020-11-12 08:14:31 MST							
Total Unique Users	48							
Total Views	8.30%	4						
Total Completions	2.10%	1						
Modules								
Bilal Test Module	users_with_access	48	users_completed	1				
Users								
last_name	first_name	user_status	module	viewed_status	completion_status	enrollment_status	date_complete	items_completed
Admin	Test	Active	Bilal Test Module	no	Not Completed	no		0 out of 1
admin	chris	Active	Bilal Test Module	no	Not Completed	no		0 out of 1
Admin	Page	Active	Bilal Test Module	no	Not Completed	no		0 out of 1
Ahmed Learner	bilal	Active	Bilal Test Module	yes	Not Completed	yes		0 out of 1
Bilal	Super	Active	Bilal Test Module	yes	Completed	yes	2020-11-04 07:13:01 MST	1 out of 1

Figure 30 – MMCR – Filter Based CSV Export Preview

Admin Role based Controls for Test Attempt Notifications
Under *Admin Tool > Users > Roles > [access any admin role]*;

- If there is a Role Audience as well as a Role Administrator defined,
- If any of the Role Audience users complete and fail their test but also run out of test attempts,

they will leverage this role configuration where now **ONLY** the Role Administrators for that Role Audience will be notified of test attempts that need to be added. Unnecessary notices will no longer be sent to the Super Admins for their action.

***<u>Note:</u>* With this change, it is necessary to note, that there needs to be both a Role Audience as well a Role Administrator set. Otherwise, a Role Audience with no Role Administrator will never notify anyone if there is no associated Role Administrators set as well.**

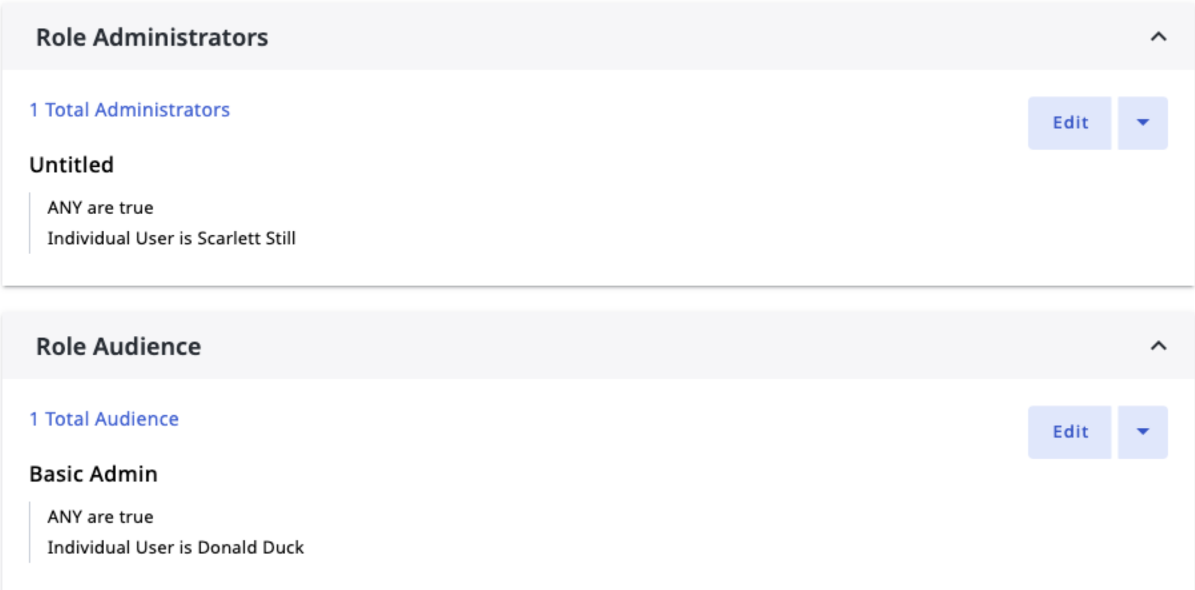

Figure 31 – Role Based Controls