KMx Version 9.0 Release Notes

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Introduction

Our latest update to KMx has focused on providing actionable data visualization features. Having reviewed all of our competitor's offerings, we are confident that these new features put KMx years if not a decade ahead of the competitive solutions available. Instead of having to "make do" with the reports and charts provided by competitive solutions, KMx clients can design colorful and graphic visualizations of their learning and talent management program without programming or use of third-party reporting tools! Each of these features provides actionable interfaces to enable work-flows, change management and administration that are data-driven! These truly ground-breaking capabilities can be delegated by administrators to other administrators, students, instructors and supervisors. The technology automatically tailors outputs to the responsibilities and authority of the person accessing the feature.

KMx Dynamic Organization Charts enable administrators to design custom organization charts that display virtually any aspect of your talent management program:

- Education, Qualifications and Certifications
- Color Coded Assignment Completions/Delinquencies
- Color Coded Company, Division, Department Assignments
- Open Positions and Color Ranked Candidates
- Cameo Pictures
- Hot link and Drill-Down Capabilities
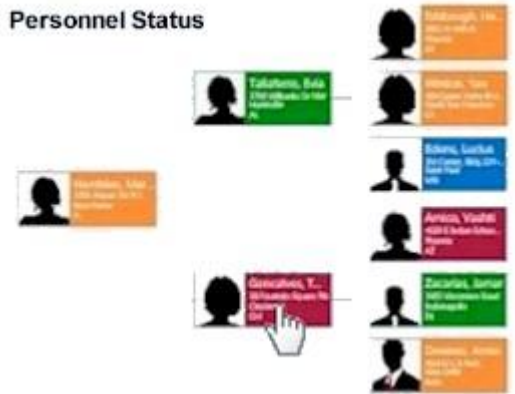
Google Maps ™ Integration Tools enable map presentations of location/address administrators to create highly customized virtually any talent management data with information:

- Personnel by Location/Address
- Classes by Location/Address
- Organizational Entities (Companies, Divisions, Departments)
- Color Coded Assignment Completions/Delinquencies
- Color Coded Company, Division, Department Assignments
- Open Positions and Color Ranked Candidates
- Cameo Pictures
- Hot link and Drill-Down Capabilities

KMx Dynamic Reports enable administrators to create reports and Excel ™ spreadsheets using any combination of data elements in the KMx Learning, Talent and Content Management Systems:

- Enables Sorting on any Report Column without regeneration
- Enables Search/Filtering of the report output
- Color Coded Assignment Completions/Delinquencies
- Color Coded Company, Division, Department Assignments
- Open Positions and Color Ranked Candidates
- Cameo Pictures
- Hot link and Drill-Down Capabilities

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KMx Dynamic Graphs provide all of the features and capabilities of KMx Dynamic Reports to produce colorful and animated graphs. KMx Dynamic Graphs leverage HTML5 to provide interactivity and animation. KMx Dynamic Graphs types include:
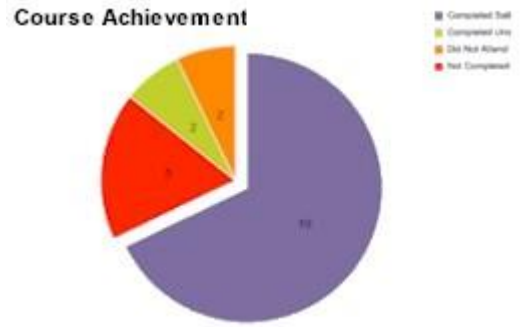
Course Achievement

- Pie Charts (with animated hover-over slices)
- Donut Charts (with animated hover-over slices)
- Bar Charts (with animated bar rendering)
- Line Charts (with animated line rendering)
- Polar Radius Charts
- Waterfall Charts

Because KMx leverages HTML5, the graph and chart outputs can easily be dragged/copied into MS Word or other desktop applications for use in augmenting reports. All of the above listed features produce outputs that can be delegated by administrators to other administrators, students, instructors and supervisors. The technology automatically tailors the output to the responsibilities of the person accessing the feature (classes, subordinates, individual only, etc.).

Updates to KMx Dynamic Reports

Row link URLs:

In KMx Version 9.0, the ability to link a row of data contained in a KMx Dynamic Report was added. The only requirement for using Row Link URLs is to set "Enable Dynamic Sorting" to "Yes" on the report definition form and to enter the URL into the entry labeled "Row Link URL" on the "Advanced Run-Time Filter Options" form for the report. If you want the link to pass identification information to the URL/page, the report must have a column titled "id" that contains the dynamic information (Member ID, Company ID, Course ID, etc.). For example, the URL below would enable a click within a report to forward to the User Record (Form 267) and pass the ID (user_id) of the user of interest:

/ihtml/application/form_modify.ihtml?form_id=267&step=1&no_head=1&update_return=%2Fihtml%2Fapplication%2F dynamic_reports.ihtml%3Freport_id=231&user_id=

In the report, the User ID field would need to exist as a report column with the title "id".

id	Name	Address	City	State	status
47119	Amico, Vashti	4020 E Indian School Rd	Phoenix	AZ	_red_
47191	Downes, Arron	40\142 C.R Park,	New Delhi	India	_orange_
47160	Drescher, Alisha	400 N Capitol St NW Ste 450	Washington	DC	_green_
47172	Edens, Lucius	3M Center, Bldg 224-1N-10	Saint Paul	MN	_blue_
47115	Eshbaugh, Heather	3011 N 44th St	Phoenix	AZ	_orange_
47151	Goncalves, Trena	38 Fountain Square Plz	Cincinnati	OH	_red_
47149	Hamblen, Margurite	3700 Airport Rd Fl 1	Boca Raton	FL	_orange_
47162	Janz, Claire	3901 S Saginaw Rd	Midland	MI	_orange_
47165	Mahaffey, Arlena	3980 Quebec St Ste 111	Denver	CO	_blue_
47203	Martini, Dean	3791 S Alston Ave , Durham, NC 27713	San Antonio	TX	_green_
47145	Metzinger, Angelita	401 Smyth	Ottawa	ON	_orange_
47105	Mike Binnix	3700 W Juneau Ave	Milwaukee	WI	_green_
47197	Pare, Horacio	3700 Ross Ave	Dallas	TX	_red_
47175	Reichling, Ruben	40 W Highland Park Dr NE	Hutchinson	MN	_blue_
47112	Scouten, Molly	3800 Blackford Ave	San Jose	CA	_orange_
47146	Taliaferro, Evia	3700 Wilbanks Dr NW	Huntsville	AL	_green_
47133	Winton, Yan	400 Oyster Point Blvd 440	South San Francisco	CA	_orange_
47178	Zacarias, Jamar	3905 Vincennes Road	Indianapolis	IN	_green_

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The example Row Link URL above will work with any KMx Form, simply replace the FORM_ID (267) with the desired form to link to. The NO_HEAD=1 entry is used to prevent KMx from rendering the administrative interface header (very useful when linking to forms on the user interface or forms that are displayed in a popup window).

Drill-Down Reports

Reports can also link to other reports. If you want the link to pass identification information to filter values in the linked report, the calling report must have a column titled "id" that contains the dynamic information (Member ID, Company ID, Course ID, etc.). For example, the URL below would enable a click within a report to forward to report_id #249 and pass the id as VAR1 (with :VAR1 entered as the report filter 1 value) the URL would be as follows:

/ihtml/application/dynamic_reports.ihtml?report_id=249&var1=

On report #249 (the report that provides the expanded detail in the drill-down sequence) you can set the option labeled "Enable Return Button" to "Yes" to provide a back arrow return option at the top of the report.

Report #248 below is designed to allow the user to click on a row to drill-down for additional detail in report #249 and report #249 should only display the information associated with the ID information passed.

By setting the option labeled "Enable Return Button" to "Yes" on report #249 you can provide a back arrow return option to enable the user to return to report 248.

The example Row Link URL above will work with any KMx Form, report replace the REPORT_ID (249) with the desired report to link to.

New Color Coding Functions by Report Type:

Individual report row entries can have unique colors based on a calculated function (i.e. Member Certification Due Color Code) or based on values stored in a custom field (member custom 1-20, company custom 1-10, etc.). The output colors available are as follows:

1. _green_
2. _orange_
3. _red_

These colors are intended to draw visual contrast with the default Color Schemes (see below) and to highlight conditions (good, neutral, bad) to enhance the report. Numerous functions have been added to Dynamic Reports to provide color coded status. All of the new functions are included in the report table titled "DOO" for the report types as follows:

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Enrollment Data – Course Enrollment One Member/Course
- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue or Failed

Member Data – Course Enrollment One Member/Course
- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue or Failed

Member Data - Personnel Category & Certification Assignments Aggregate Single Member
- Green – All Completed
- Orange – All or Some Not Completed, None Overdue
- Red – All or Some Not Completed, One or More Overdue

Performance Evaluation Data - Scheduled Member Evaluation Standard/by Supervisor ID
- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

Performance Evaluation Data - Scheduled Member Evaluation Special/by Supervisor ID
- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

Personnel Category Data – Aggregate Assignment/Member
- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

Certification Completion Data Summary - Single Certification/Member
- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

Certification Completion Data Detail - Single Assignment/Member
- Green - Completed
- Orange - Not Completed, Not Overdue
- Red – Not Completed, Overdue

Company - Personnel Category/Certification Assignments Aggregate/Company
- Green – All Completed
- Orange – All or Some Not Completed, None Overdue
- Red – All or Some Not Completed, One or More Overdue

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KMx Dynamic Charts

In KMx Version 9.0, Dynamic Reports was integrated with an organizational chart development tool to create KMx Dynamic Charts. While primarily designed to display highly visual organizational charts, this new feature is also capable of rendering other parent/child relationships. Items including course catalogs, K/S Table hierarchies, company hierarchies and other structures can be created using these new tools.

KMx Dynamic Charts are created using the same menu options and forms that are used to create Dynamic Reports. The charts do have required elements to enable the technology to properly construct the desired hierarchy. The required elements include three specific columns:

id – The ID of the item to be depicted (Member ID, Catalog ID, etc.). This must be the first column contained in the dynamic report and must be titled "id".

parent id – The ID of the items parent (Supervisor Member ID, Parent Catalog ID, etc.). This must be the second column in the KMx Dynamic Report and must be titled "parent id".

Title/Name – The third column contained in the Dynamic Report will become the title for the item in the hierarchy representation (Member Name, Catalog Title, etc.). This column will also become the element that is linked if you decide to link your chart items using Row Link URLs (see below). This column title can be whatever best represents the content of the column.

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Optional columns:

image – If a column titled "image" is included in the Dynamic Report, the Dynamic Chart will display the image for the chart row with the hierarchy element when rendered. For example, if the Member Image URL field is used by your site to store images of your members, adding a column titled "image" and selecting the Member Image URL field would enable the chart to display the picture of the user in the organizational chart.

Color Codes – Individual chart entries can have unique colors based on a calculated function (i.e. Member Certification Due Color Code) or based on values stored in a custom field (member custom 1-20, company custom 1-10, etc.). The output colors available are as follows:

4. _green_
5. _orange_
6. _red_
7. _blue_

These colors are intended to draw visual contrast with the default Color Schemes (see below) and to highlight conditions (good, neutral, bad) within an organizational structure.

The Advanced Run-Time Filter Options page (a popup on the KMx Dynamic Report Edit Form) has all of the options associated with the creation of a Dynamic Chart.

KMX Dynamic Chart Formatting Options

Color Schemes:
- darkred
- pink
- darkorange
- orange
- lightgreen
- green
- lightteal
- teal
- lightblue
- blue
- darkpurple
- purple
- mediumdarkblue
- darkblue
- cordovan
- darkcordovan
- neutralgrey
- black

Chart Orientation:
- getOrgChart.RO_TOP
- getOrgChart.RO_BOTTOM
- getOrgChart.RO_RIGHT
- getOrgChart.RO_LEFT
- getOrgChart.RO_TOP_PARENT_LEFT
- getOrgChart.RO_BOTTOM_PARENT_LEFT
- getOrgChart.RO_RIGHT_PARENT_TOP
- getOrgChart.RO_LEFT_PARENT_TOP

Chart Themes:
- annabel
- belinda
- cassandra
- deborah
- lena
- monica
- eve
- vivian
- helen

For examples of the color schemes, chart themes and chart orientation options, please see:

http://www.getorgchart.com/Demos

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Google Maps ™ Integration Tools

In KMx Version 9.0 we have included tools to enable administrators to output data directly to Google Maps ™. The minimum requirement for Google Maps to display a location pin or icon is a title for the item and an address for the item. Addresses should be at least a city with a state (if in the U.S.) or country (if outside the U.S.). The ability to display popup images (individual profile images, location images, etc.) is included in the integration as well as the ability to hot-link the item to other forms, reports and site pages. As with KMx Dynamic Charts, the Advanced Run-Time Filter Options page (a popup on the KMx Dynamic Report Edit Form) has all of the options associated with the KMx integration with Google Maps ™. Row Link URLS can be used in conjunction with a maps to enable hot-linking from a map to other reports and/or forms.

Maps based on Tabular Information

A good example of a tabular report that would be suitable for export to Google Maps ™ would be a roster of personnel by address or location. Like KMx Dynamic Reports and Charts, successful hot-linking to other reports or forms normally required the inclusion of a column labeled "id" that contains the unique identifier for the row (or subsequent map point).

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Setting the "Map display string" value

Before setting the option labeled "Report is a Map Type" on the Advanced Run-Time Filter Options page, test your report as a report to ensure it is working as desired. This step will also populate the entry labeled "SQL Query" at the bottom of the Advanced Run-Time Filter Options page. This entry can be used as a reference to ensure that the "Map Display String" value is entered correctly.

Example "SQL Query" Entry:

"SELECT members.user_id , members.member_name , members.member_address , members.member_city , members.member_state , members.member_image_url , members.member_custom20 FROM members with (NOLOCK) WHERE members.organization_id=27 and members.member_company_mask like '%47105-%' order by members.organization_id asc , members.member_company_mask asc"

Example "Map Display String" Entry:

[:qt:3 :4: :5:qt, :qt
:2:qt,:qt:7:qt],

Using the two examples above, the "Map Display String" will produce a Google Map ™ with the following characteristics:

[:qt = Begin Google Maps Display String

:3 = from the members table use the member.address

:4 = from the members table use the member.city

:5 = from the members table use the member.state

:qt, = End Address/Location Information for Map Display Point

:qt = Begin Map Point Hover/Click Display

 = Make the Map Display Point a hot-linked entry to the row_link_url

 = Display the individuals image using the member_image_url field in the members table

 = After the image, put a link break into the display

:2 = Display the individuals name using the member_name field in the members table

 = End hot-link

:qt, = End Map Point Hover/Click Display

:qt = Begin Map Marker Display

:7 = Use the color code (_green_, _red_, _orange_ etc.) contained in the member_custom20 field in the members table to produce the map marker

:qt], = End Google Maps ™ Display String

There are an unlimited number of possible entries that can be used to produce the map, hover/click entries and map markers. The example above includes most of the popular entries and methods. Please contact KMSI support for assistance with creating display strings.

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Maps Based on Group/Location Statistical Data

While somewhat more complex than using a simple tabular report to generate a map display, the combination of KMx Dynamic Graph outputs with Google Maps ™ can produce visualizations that combine statistical data with location data. Before setting the Advanced Run-Time Filter Options for the map display, create a Dynamic Graph that produces the location (address, city, state, etc.) information with the associated statistical information (enrollments, delinquent student, schedule classes, etc.) as a Bar Chart. This will ensure that as you setup the Advanced Run-Time Filter Options, you are only focusing on output of the location/statistical information to Google Maps as you build the Map Display String Entry.

Example "Map Display String" Entry for a Map Based on Group/Location Statistical Data:

[:qt:1 :2 :qt, :qt Count of :3 at :1 :2:qt,:qt:pink:qt],

[:qt = Begin Google Maps Display String

:1 = from the members table use the member.city

:2 = from the members table use the member.state

:qt, = End Address/Location Information for Map Display Point

:qt = Begin Map Point Hover/Click Display

Count of :3 at = Short message ("Count of") and the NUMERIC value followed by the word "at"

:1 = from the members table use the member.city

:2 = from the members table use the member.state

:qt, = End Map Point Hover/Click Display

:qt: = Begin Map Marker Display

Pink = Use Pink for the map markers

:qt], = End Google Maps ™ Display String

There are an unlimited number of possible entries that can be used to produce the map, hover/click entries and map markers. The example above includes most of the popular entries and methods. Please contact KMSI support for assistance with creating display strings.

Note: Use of Google Maps™ requires acceptance of the Google Terms & Conditions. Restrictions and additional fees may apply. Contact KMSI support for additional information.
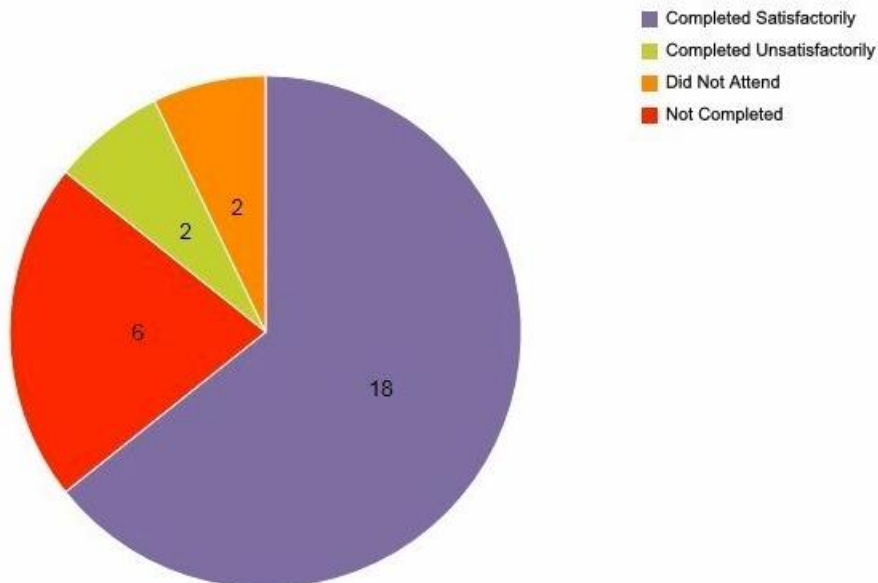
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Updates to KMx Dynamic Graphs

KMx Dynamic Graphs leverage HTML5 to provide interactivity and animation. The process for developing a Dynamic Graph is unchanged. On the Dynamic Report Setup Form, the Graph Type dropdown option now includes:

- Pie Charts (with animated hover-over slices)
- Donut Charts (with animated hover-over slices)
- Bar Charts (with animated bar rendering)
- Line Charts (with animated line rendering)
- Polar Radius Charts
- Waterfall Charts

Dynamic Graph Outputs can also be the basis for Google Maps ™ to display statistical information for groups at locations. See Google Maps ™ Integration Tools for additional information.

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Update to KMx Exams, Surveys and Performance Evaluations

We have improved the visual presentation of KMx Exams, Surveys and Evaluations by extending the style options associated with questions, answer options and post-exam displays. When Version 9 is deployed, the changes will not alter the display. To enable the enhanced visual presentation, clients will need to request a style sheet and language pack change. The options include:

1. Selection of selected, unselected and hover-over "answer" background colors.
2. Selection of "question" and "answer" text fonts and colors.
3. Selection of "bubble", "button" visual display of "answer" areas.
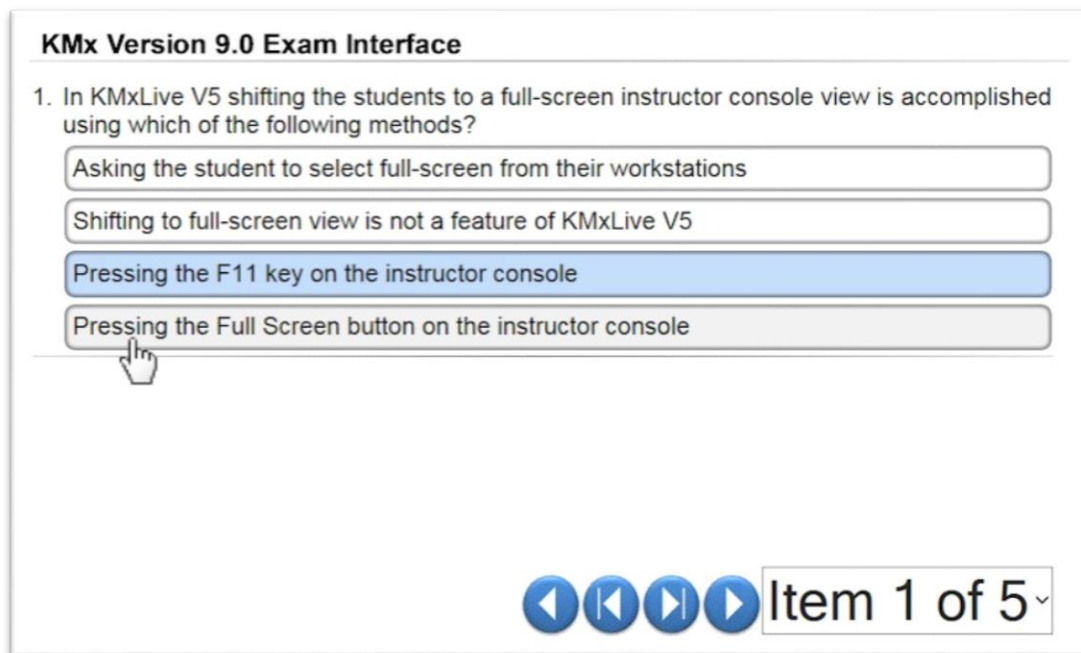
Using the customer support and ticketing system, a KMSI representative can review the options with clients and use our QA servers to review these options prior to production deployment.

Update to KMx Course Player Interface

The KMx Course Player has been updated to enhance the user interface for courses with a single SCORM Sharable Content Object (SCO) that require a separate window to properly operate. These types of courses are exceedingly rare and normally are produce by vendors that are not fully qualified to produce SCORM courseware. The update enables the course player and SCORM Application Programming Interface (API) to operate in a hidden/minimized window while the SCO is playing and then automatically close when the student exits the SCO. This change will only affect courses with a single SCO where the SCO was authored to require the SCO window to close in order for student progress information to be recorded. This change will not be noticeable for any course that was developed in accordance with the SCORM standard.

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User Image Upload Feature

KMx Version 9.0 now provides the ability for users, supervisors or administrators to upload user images for use with Dynamic Organizational Charts, Google Maps ™ and Dynamic Reports. Enabling this feature requires the customer to submit a customer support ticket identifying who should have the ability to upload user images into the KMx data system (users, supervisors or administrators). Once enabled, the "Upload Member Profile Picture" option will be available to the appropriate personnel.

Disable Select Administrative Options

Due to the number of options and available features, we have added an option to the administrative interface (Setup/System Administration) labeled "Disable/Enable Form Items". All form entries on the administrative interface (Form Items) are uniquely numbered. In order to universally disable an option, select "Disable/Enable Form Items" and then select the item number (titles are also provided) using the Multi-Select control. To return an option to service, simply unselect the item using this control. An example would include the eCommerce options available for course and class records. Using this new feature a customer that would like to remove these options from the course/class setup screens can do so without having to contact customer support.