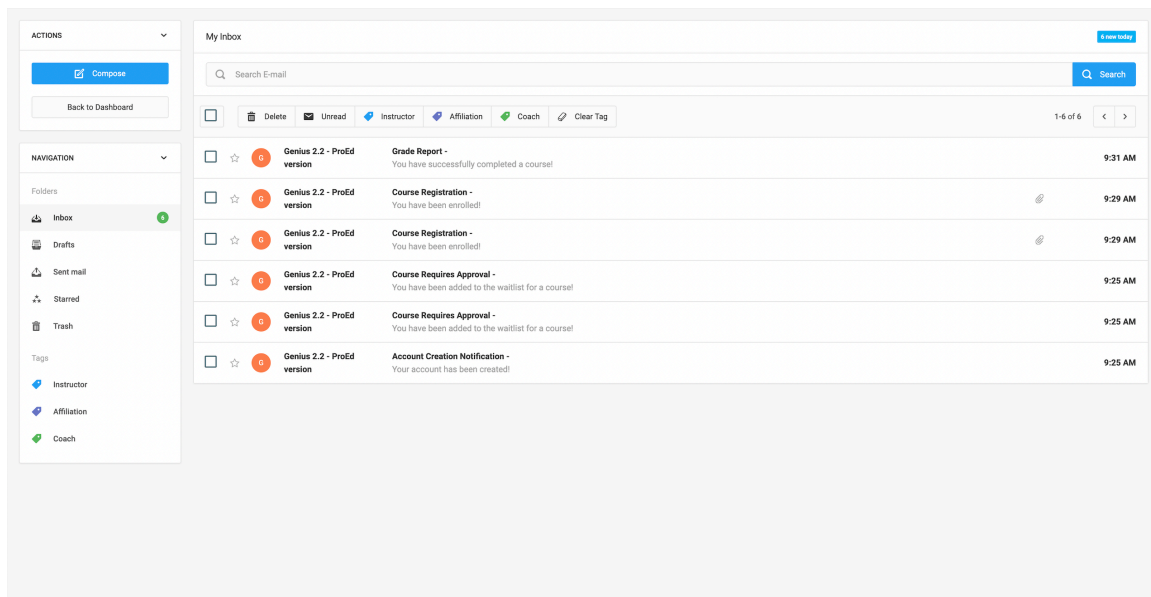


New Features in Release 3.0

We are excited to introduce you to what's new in Genius Enterprise release 3.0! We continuously strive to improve the registration, enrollment management, and reporting experience in Genius - no matter how you chose to deliver your training. This release includes many new features and enhancements to existing features, which are described below.

Messaging Center

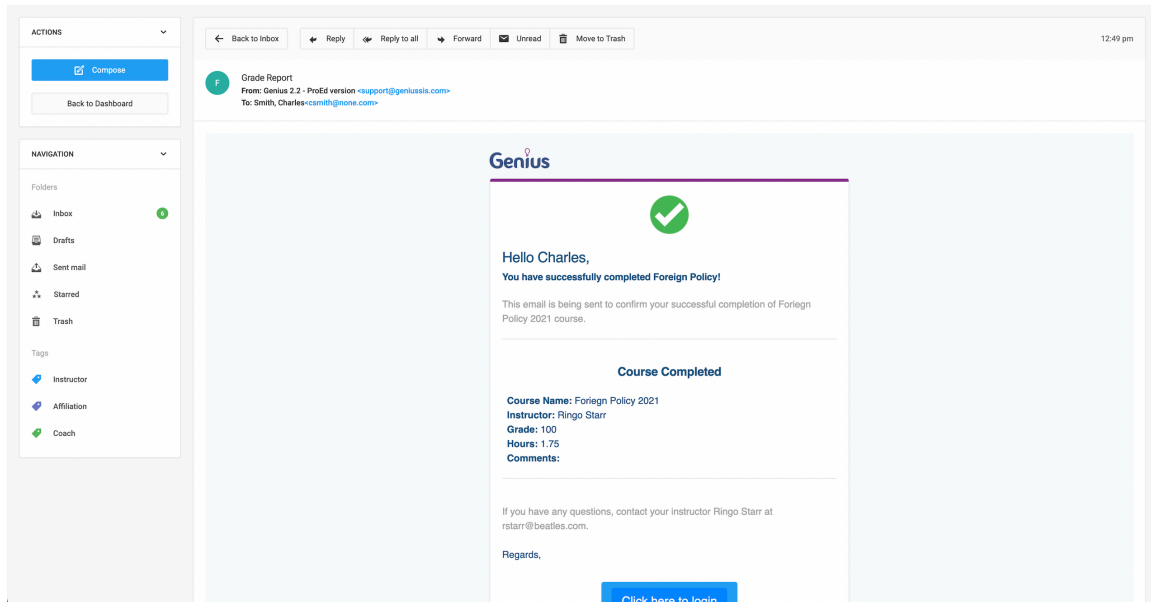
Genius' main form of communication with learners has always been through email. You could also pay extra for Genius to support SMS text messaging. The challenge was for learners who don't have an email address or couldn't easily access their email when attending offsite training. Now, Genius has an internal messaging center where internal messages can be sent and accessed within Genius.



Any email sent from Genius are sent to the learner's preferred email service provider email address. Those emails are also sent to the learner's internal message center, so they can access both Genius emails and Genius messages in the message center. Messages are only sent and received in Genius. They are not sent to the learner's email address as well.

The Admin role can message any user. The Affiliation role can message only members of the affiliation(s) they manage. The Coach role can only message learners they are coaching. The Instructor role can only message learners enrolled in course-sections they teach. There is a new parameter called `MESSAGING_ROLES_LEARNERS_CAN_REACH` which determine what roles a Learner can send messages too (Instructor, Coach, Affiliation, Admin). Access to the new Message Center can be controlled by role, using Administration > Access Setup. Genius' Messaging Center is not designed to replace email from anyone to anyone.

New Features in Release 3.0



Improved integration with Instructure Canvas, D2L Brightspace, Blackboard Learn, Moodle, and SCORM Cloud.

Each LMS has its own API and feature set that we try to leverage consistently across Genius so you can choose the best tool to deliver your training. Genius handles the registration, eCommerce, course creation from a master course template, enrollment into various course offerings, near-real-time grade retrieval, and robust reporting across LMS silos.

With Instructure Canvas we improved the API integration to support course blueprint masters, where sections/offerings can inherit changes made in the blueprint master course. We can configure the integration to create the LMS courses in published or unpublished status, the default is to create courses in Canvas as published. We also enhanced course-section completion formulas to better flag successful completion of a course. There is a new `PASSING_GRADE` parameter that flags completion once the gradebook total exceeds the passing grade. We also have three parameters that determine: whether we send a course completion to Canvas and make the learner unavailable in the course (`DO_NOT_SEND_COMPLETION_TO_LMS`); whether we send a learner archive to Canvas and make the learner unavailable in Canvas (`DO_NOT_SEND_LEARNER_ARCHIVE_TO_LMS`); and whether we send a course-section/offering archive to Canvas and make the course unavailable in Canvas (`DO_NOT_SEND_SECTION_ARCHIVE_TO_LMS`).

With D2L Brightspace, we worked with our clients to improve the overall integration so you can do everything in Genius that you can with any other LMS. Not only is the improved integration seamless, but we even added a CSS theme to make Genius look more like Brightspace, incorporating Brightspace colors and fonts for interface consistency.

With Moodle, we added an out-of-the-box core Moodle API integration that can work with any Moodle product that is built on Moodle core. Instead of using Genius' view of the gradebook to

New Features in Release 3.0

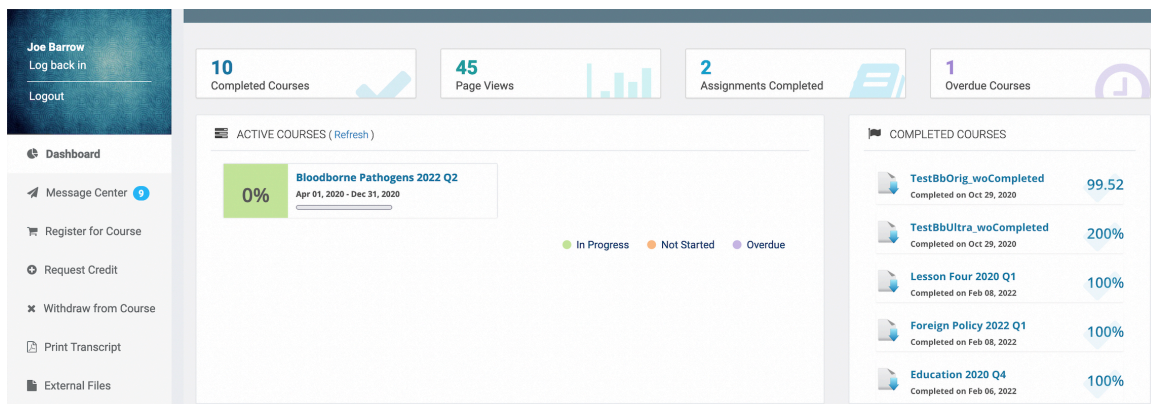
determine whether a user has successfully completed a course, we use the course completion flag (enrollment “completionstatus”) in Moodle to determine if the learner has successfully completed the course.

Learner Dashboard and Section Grade Download Refresh

Once a learner logs into their learner dashboard, we added a “Refresh” link to the Active Courses module so they could download all their individual grades in near real-time. There are two new parameters that control whether the feature is exposed or not, and how long you have to wait before you can refresh your grade download again.

LEARNER_DASHBOARD_GRADES_REFRESH_ENABLED determines whether the option to download grades in near real-time is available to the learner.

LEARNER_DASHBOARD_GRADES_REFRESH_TIMEOUT determines that amount of time in seconds that you have to wait to give the grade download time to run, before you can run it again.

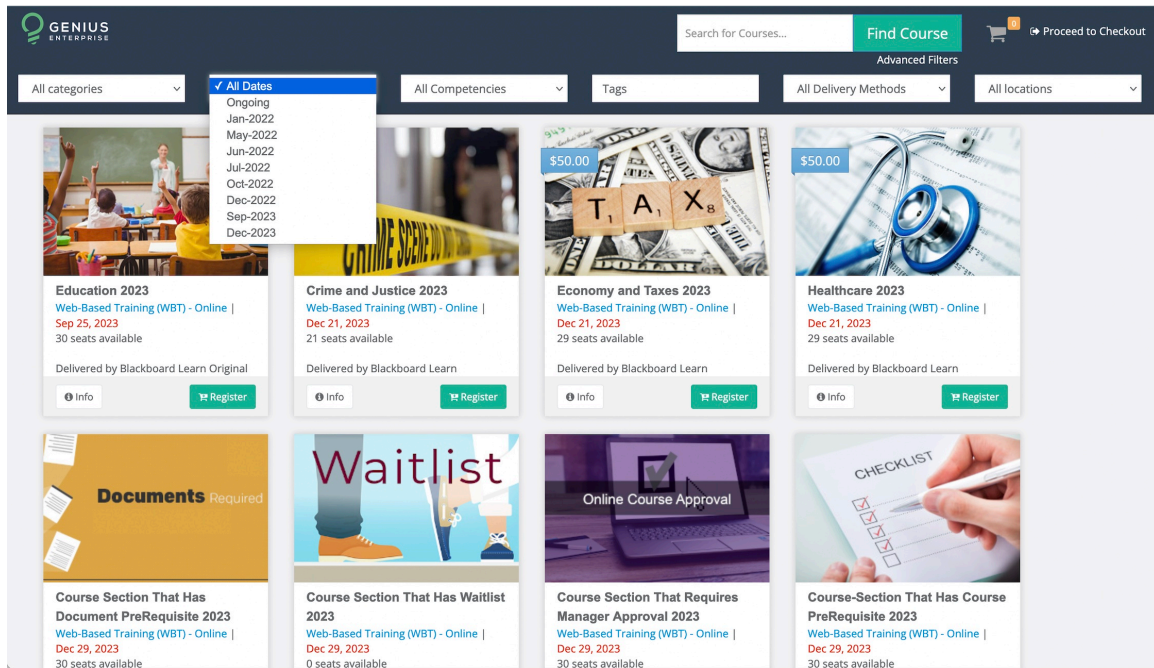


We have an existing grade download job, typically run nightly, that will download grades for all active enrollments, in all active course-sections. Due to the speed of the LMS API calls to get all this data and the bottlenecks it can create, we added a new Refresh Grades option at the section level, which will get grades for all active enrollments in a single section. You will see the option under the section record, there is a new button called “Download Grades”. We also broke the overall grade download job down to only process grade downloads by sections at a time, so an issue with one section won’t stop the grade download process from other sections.

Improved Date Filter on the Course Catalog

The date filter on the registration and catalog pages have been improved, so you can easily see all courses that start in a particular month, and you can even filter for ongoing courses that have no defined start or end dates. The month only displays if there are sections that start that month.

New Features in Release 3.0



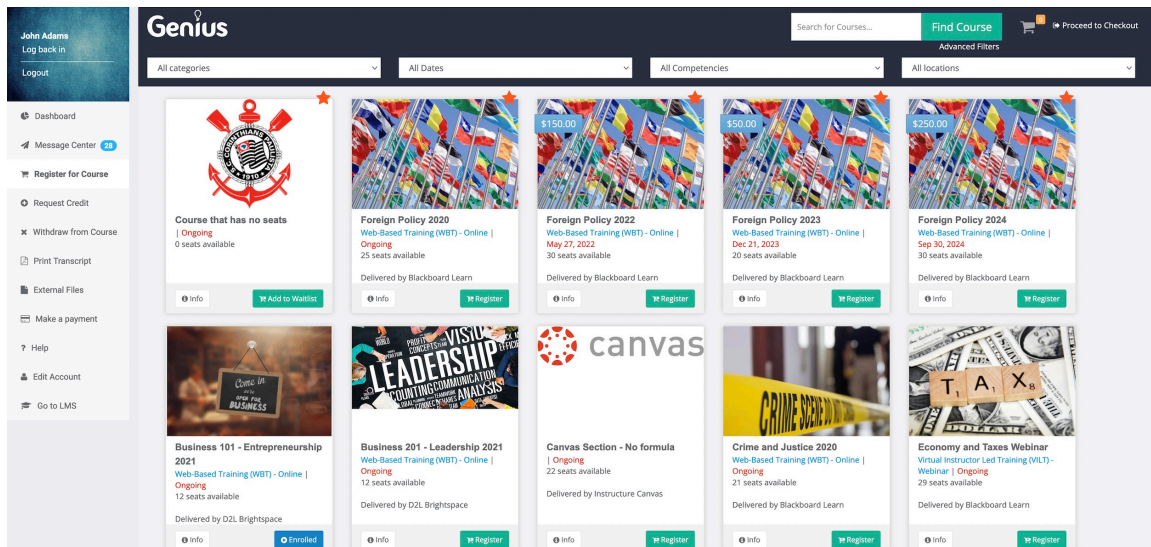
New Tags for Categorization and Search

We added the ability to associate any number of tags to a Course or Learning Path. On the registration page, you can use one or more tags to search courses and learning paths you are interested in registering for.

Ability to Highlight or Pin Selected Courses or Sections to the Top of the Catalog, and Learning Paths to the top of the Learning Path List in the Catalog

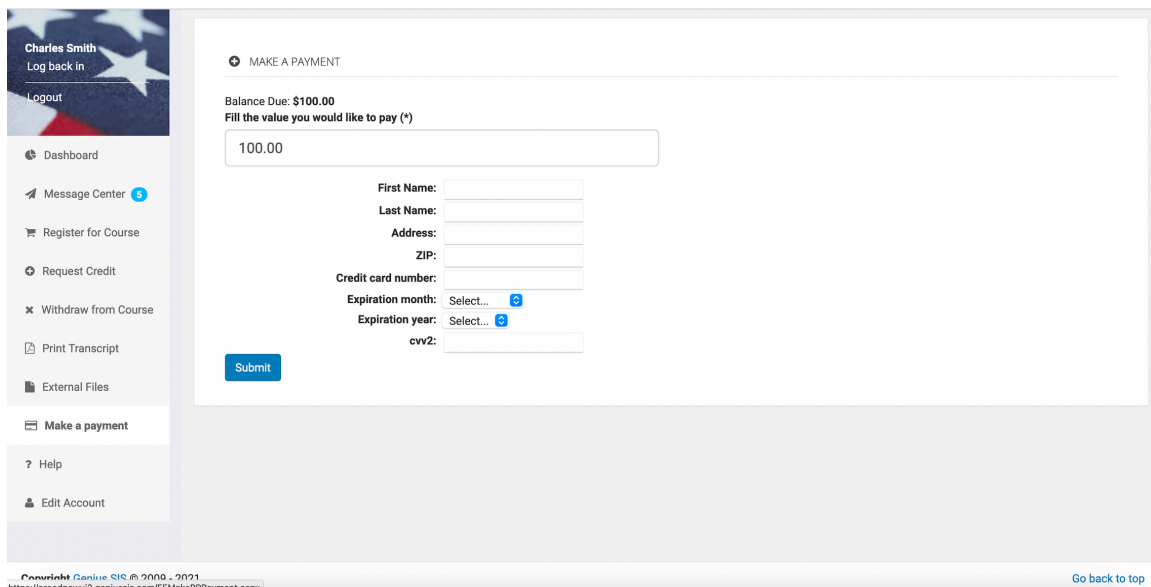
We added the ability to sort the course catalog by section start date, section end date, or alphabetically in our last release. Now we added the ability to highlight or pin certain sections, courses to the top of the course catalog. Learning Paths typically appear after all the course sections, but now you can highlight a Learning Path to put it at the top of the list with a highlight icon. There is a new Parameter, called `HIGHLIGHT_COURSE_IMAGE` that determines the look of the pin icon that appears in the upper right hand corner. A new Yes/No field has been added to sections, courses, and learning paths indicating whether it should be Highlighted or not in the course catalog.

New Features in Release 3.0



Improved Ledger and Payment Options

We made many improvements to ledger logic, payment processing, coupons, and reporting. We added transaction IDs to better track a single payment back to multiple items purchased. Instead of having the learner pay in full, up front for enrollment, we added an option to pay over time from the learner dashboard.



For learners carrying a negative ledger balance, there is a new parameter called **LEDGER_INTEREST** that determines the monthly interest charged. There is a new **CheckLearnerBalance.AddInterestToLedger** job that can be scheduled to run on the 1st of every month. This job adds an interest charge to the ledger, based on a designated **LEDGER_INTEREST** percentage, for any learner that has a negative ledger balance at the time.

The ledger report allows you to easily filter the ledger for a specific learner, course-section, learning path, or affiliation. We added the ability for an affiliation manager (company) to log in

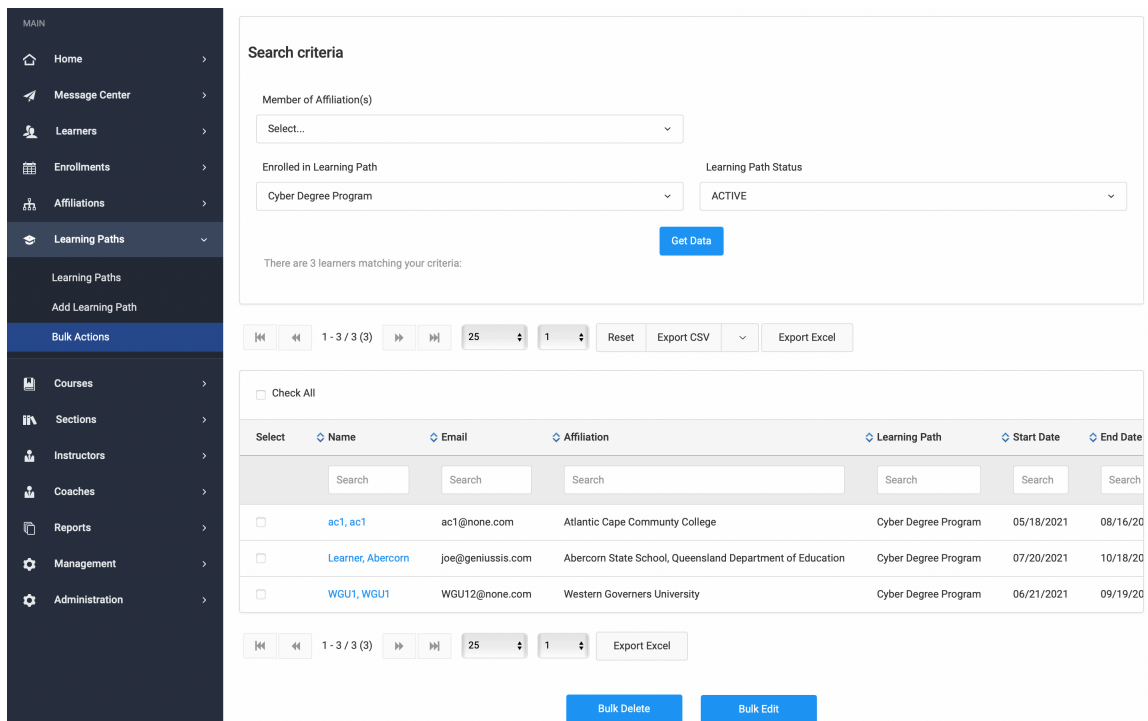
New Features in Release 3.0

and pay for all the enrollments by their affiliation members. The paid credit is applied to each learner who contributed to the affiliation’s ledger balance. This gives a company another option to pay for employee training, rather than have each learner pay for training and get reimbursed by their company.

We also improved coupons, so you can now have coupons that are specific for a course-section, learning path, affiliation, or they can be used system-wide for any purchase.

Bulk Edit under Courses, Sections, and Learning Paths for All Fields

We have existing capabilities to perform bulk actions under the learner and enrollment menus. We extended this capability to perform bulk actions to courses, sections, and learning paths. For courses and sections, the main capability is to perform bulk edits to all course and section fields where bulk field edits make sense. For learning paths, not only can you perform bulk edits to learning path fields, but you can also bulk delete enrollments in a learning path. We enhanced the existing bulk edit of learners, extending the out of the box and custom fields that can be edited.



The screenshot displays the 'Learning Paths' section of the Genius Enterprise interface. On the left is a dark sidebar menu with options like Home, Message Center, Learners, Enrollments, Affiliations, Learning Paths, Courses, Sections, Instructors, Coaches, Reports, Management, and Administration. The 'Learning Paths' menu item is expanded, showing 'Learning Paths', 'Add Learning Path', and 'Bulk Actions' (which is highlighted).

The main content area shows a 'Search criteria' form with the following fields:

- Member of Affiliation(s): A dropdown menu with 'Select...' as the current value.
- Enrolled in Learning Path: A dropdown menu with 'Cyber Degree Program' selected.
- Learning Path Status: A dropdown menu with 'ACTIVE' selected.

 A 'Get Data' button is located below the search criteria. Below the form, it states 'There are 3 learners matching your criteria:'.

Below the search results is a table with the following columns: Select, Name, Email, Affiliation, Learning Path, Start Date, and End Date. The table contains three rows of data:

Select	Name	Email	Affiliation	Learning Path	Start Date	End Date
<input type="checkbox"/>	ac1, ac1	ac1@none.com	Atlantic Cape Community College	Cyber Degree Program	05/18/2021	08/16/20
<input type="checkbox"/>	Learner, Abercorn	joe@geniussis.com	Abercorn State School, Queensland Department of Education	Cyber Degree Program	07/20/2021	10/18/20
<input type="checkbox"/>	WGU1, WGU1	WGU12@none.com	Western Governors University	Cyber Degree Program	06/21/2021	09/19/20

At the bottom of the table, there are 'Bulk Delete' and 'Bulk Edit' buttons.

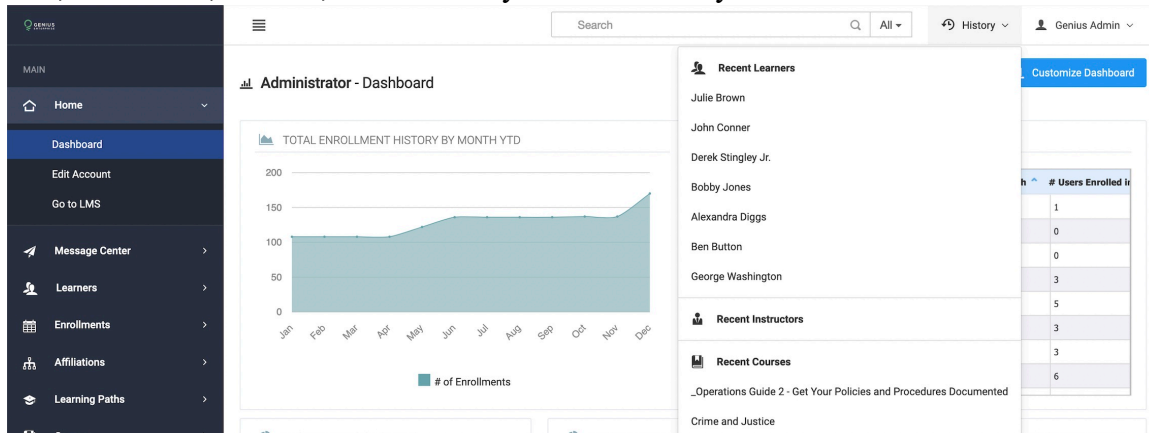
Consolidate Terms, Categories, Payment Options under Lists

We have moved Terms and Categories off the Administration menu to try to consolidate all lists in Genius under Administration > Lists. Now there is once place to add, update, and delete items on a list in Genius. We have also added registration payment options to Administration > Lists so you can control which payment options (Mail a Check, Pay via Credit Card, Charge my Company) you wish to allow, and how they are labeled.

New Features in Release 3.0

History of Past Actions

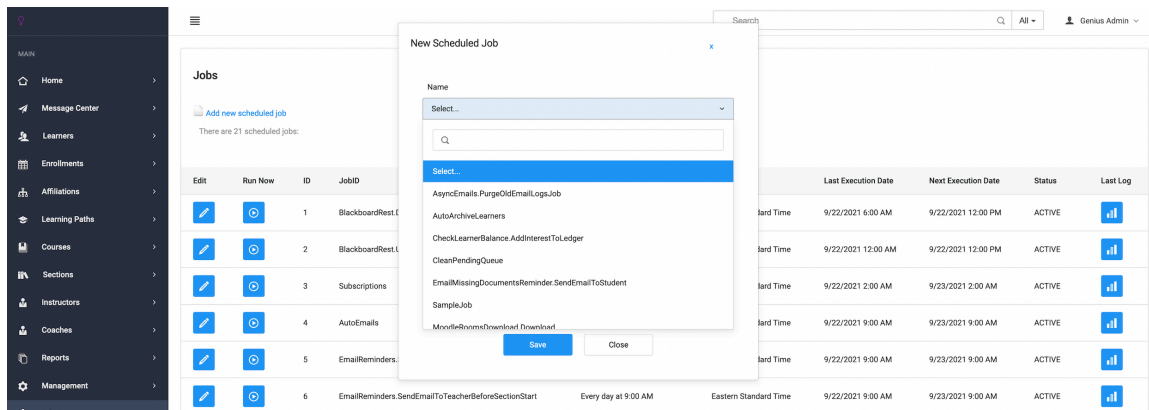
We brought back the recent history button of past actions, so you can quickly go back to see learners, instructors, courses, and sections you most recently viewed.



Job to Archive Learners Automatically N days Since Last Login Date

We have added a nightly job under Administration > Edit Jobs that automatically archives every user who's last login date is greater than N days old. There is a new parameter call LAST_LOGGED_IN_DATE_IN_DAYS that determines the value of N.

If you don't see the job in your list of ACTIVE and ARCHIVED jobs, go to "Add new scheduled job" and pick the reoccurring jobs you want to add to Genius.



Auto Email to Notify that Jobs Run Manually Succeeded

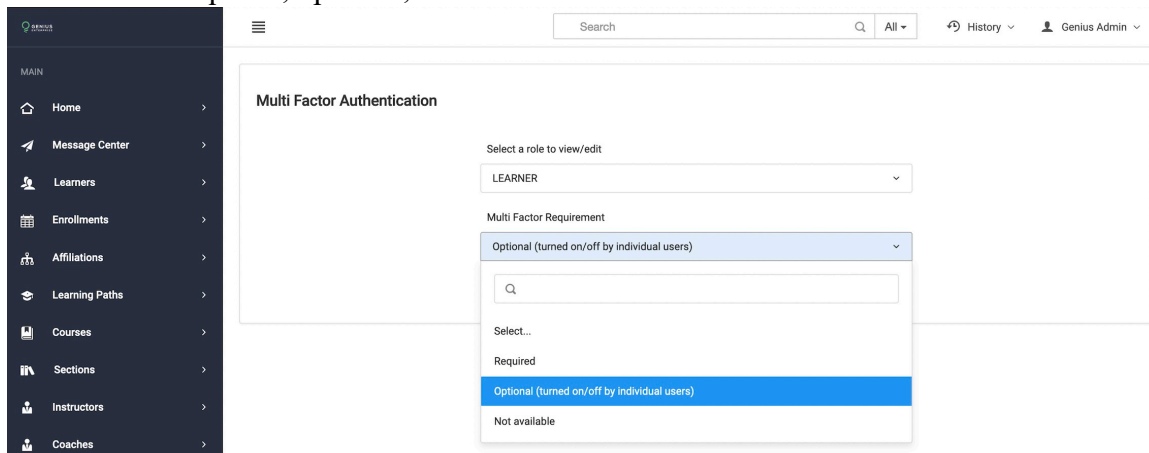
We created a new AUTO_JOB_EXECUTION_SUCCEEDED email template that is sent out to the user who manually executes a job, telling them the results of the job they ran in the server background queue.

Multi-Factor Authentication

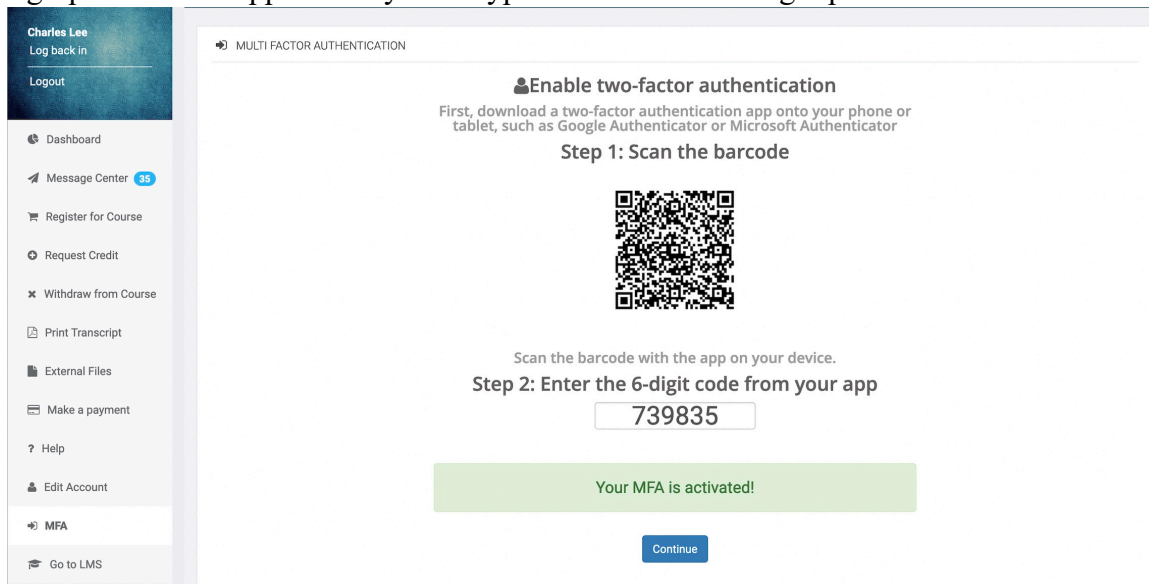
For enhanced security, we added two factor authentication into Genius using the Microsoft Authenticator or Google Authenticator apps. An Admin can set up two factor authentication for

New Features in Release 3.0

any user role (Administration > Two Factor Authentication). You can determine if two factor authentication is required, optional, or not available for that role.

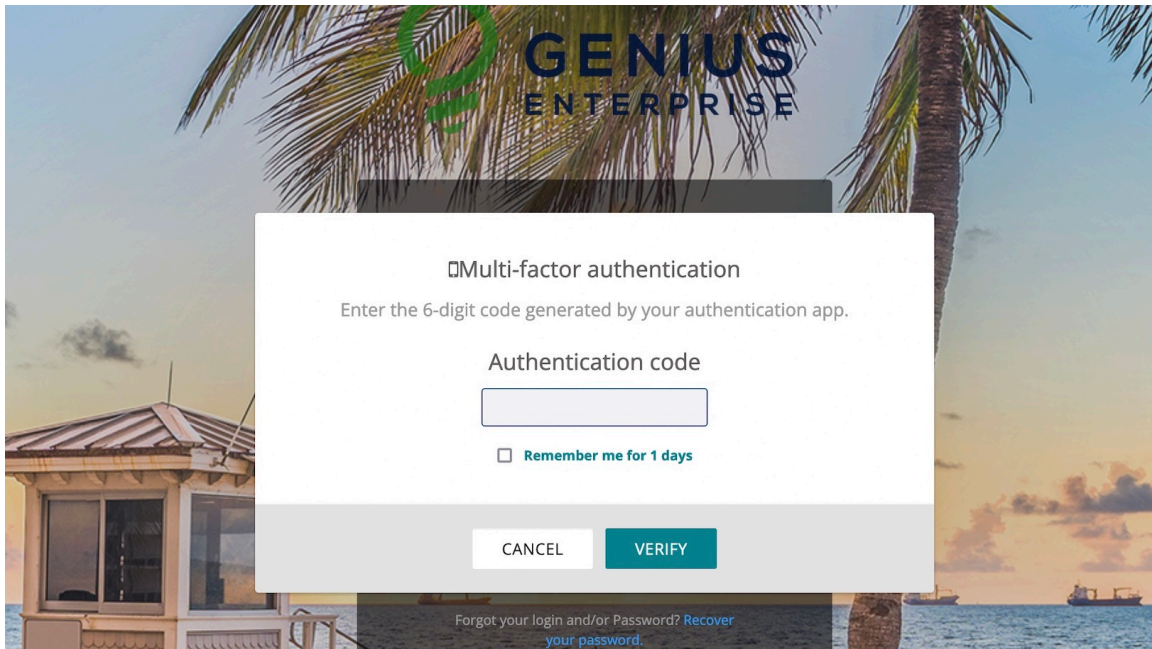


The first time a user with that role logs in, they will see a barcode that they can scan to add that user account to their Microsoft Authenticator or Google Authenticator app. They will receive a six digit pin from the app that they must type in to finish their login process.



Future logins will prompt the user to enter a six digit pin after they login using their Genius username and password.

New Features in Release 3.0



User Password Requirements

You can now setup and determine your own user password requirements from the Administration > Password Requirements page. In previous releases, Genius would have to custom code these requirements for each client, now each client can configure their password requirements themselves.

- Home >
- Message Center >
- Learners >
- Enrollments >
- Affiliations >
- Learning Paths >
- Courses >
- Sections >
- Instructors >
- Coaches >
- Reports >
- Management >
- Administration >
- General
- Overview
- View Logs
- Find Files
- Recurring Jobs
- Edit Jobs

Password Requirements

Min password length:

The minimum password length policy setting determines the least number of characters that can make up a password for a user account

Max password length:

The maximum password length policy setting determines the least number of characters that can make up a password for a user account

Require lowercase in password:

Password is valid only in case it contains minimum 1 lowercase character

Require uppercase in password:

Password is valid only in case it contains minimum 1 uppercase character

Require numbers in password:

Password is valid only in case it contains minimum 1 number

Require symbol in password:

Password is valid only in case it contains minimum 1 symbol

Block blacklisted passwords:

Verify if the password has been compromised in a data breach

New Features in Release 3.0

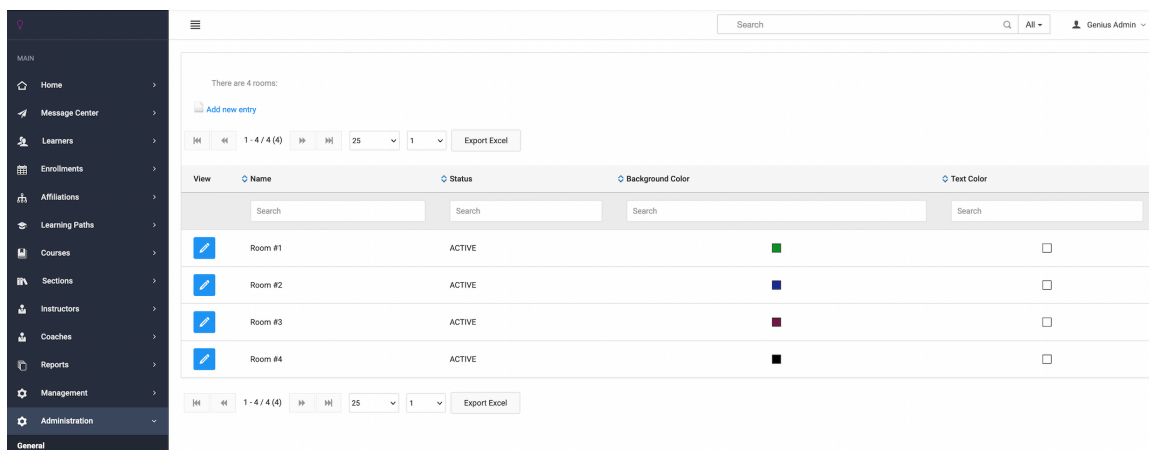
New Reports

We have added a number of new reports in Genius under the Reports menu and the Query Builder, based on requests from our customers. These are a few of the new ones:

- Expiration Reminders
- Enrollments by Course Expiration Date
- Learning Path Status
- Enrollments by Learning Path
- Completion by Learning Path
- Affiliation Ledger Report
- Affiliation Attendance Report
- Room Usage
- Competency Report
- Course-Section Schedule
- Duplicate Users
- Enrollment End Date Within 30 Days
- Enrollment End Date Within 7 days
- Enrollments Active by Category
- Enrollments Completed by Category
- External Files – Required Documents – Missing
- External Files – Required Documents – Waiting Review
- Learners who will receive the AUTO_MISSING_EXTERNAL_FILES email
- Number of Sections by Term
- On the Waitlist
- Number of Recommended Learners per Course
- Roster Report

Room Scheduling and Room Usage Report

Genius has added room scheduling and conflict resolution when creating sections. Under the Administration menu > Rooms, you can create a list of rooms available for training.



View	Name	Status	Background Color	Text Color
<input type="checkbox"/>	Room #1	ACTIVE	Green	<input type="checkbox"/>
<input type="checkbox"/>	Room #2	ACTIVE	Blue	<input type="checkbox"/>
<input type="checkbox"/>	Room #3	ACTIVE	Red	<input type="checkbox"/>
<input type="checkbox"/>	Room #4	ACTIVE	Black	<input type="checkbox"/>

New Features in Release 3.0

When adding meeting times to a section, you can now see available rooms and assign it for a section. If a room is already booked for that date and time, you will not see the room on the list to select, preventing double booking.

Add a meeting time

Delete	When	Start	End	Room Assignment
	Monday	10:00 AM	12:00 PM	Room #1

[Save](#)

There is a new calendar Room Usage report under the Reports menu that will show you all dates and times a room is being used.

- Home
- Message Center
- Learners
- Enrollments
- Affiliations
- Learning Paths
- Courses
- Sections
- Instructors
- Coaches
- Reports
 - General Reports
 - Overview
 - Statistics
 - LMS Integration
 - Expiration Reminders
 - Learning Paths
 - Bulk Email Logs
 - Bulk SMS Logs

Search criteria:

Filter by room

Select...

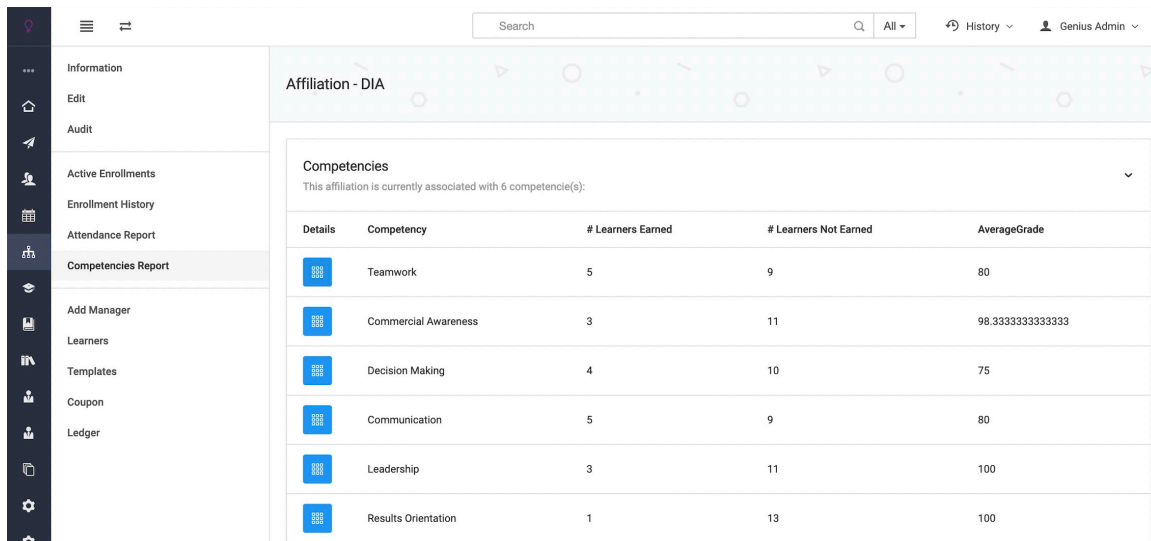
January 2022 Today Month Week Day < >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27 ● 02:00 - 03:00 Room #4	28	29	30	31 ● 09:00 - 10:00 Room #3 ● 11:00 - 12:00 Room #2 ● 01:00 - 02:00 Room #4	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31 ● 10:00 - 12:00 Room #1 ● 12:00 - 01:00 Room #1	1	2	3	4	5

New Competency Reports

We added new competency reports at the learner, section, and affiliation levels. To improve upon some of the summary data at the affiliation level, we added a details button at the affiliation level so the affiliation manager can easily see which members have and have not earned a competency.

New Features in Release 3.0

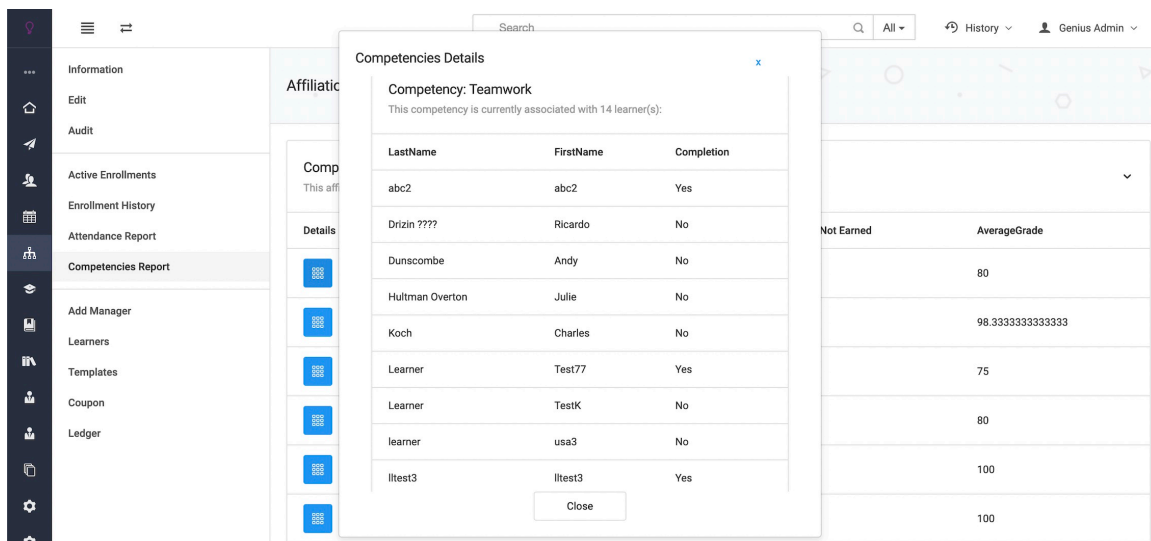


Search [] All [] History [] Genius Admin []

Affiliation - DIA

Competencies
This affiliation is currently associated with 6 competence(s):

Details	Competency	# Learners Earned	# Learners Not Earned	AverageGrade
[]	Teamwork	5	9	80
[]	Commercial Awareness	3	11	98.33333333333333
[]	Decision Making	4	10	75
[]	Communication	5	9	80
[]	Leadership	3	11	100
[]	Results Orientation	1	13	100



Search [] All [] History [] Genius Admin []

Affiliation - DIA

Competencies
This affiliation is currently associated with 6 competence(s):

Competency: Teamwork
This competency is currently associated with 14 learner(s):

LastName	FirstName	Completion
abc2	abc2	Yes
Drizin ????	Ricardo	No
Duncombe	Andy	No
Hultman Overton	Julie	No
Koch	Charles	No
Learner	Test77	Yes
Learner	TestK	No
learner	usa3	No
ltest3	ltest3	Yes

Close

New Parameters to Configure Genius

We have added several new parameters to aid in the configuration of Genius without the need for customization. We removed some parameters that are not used in the Genius Enterprise version. We also added a description for each parameter to better inform admins what each parameter does in Genius.

We added a new parameter called `USAGE_TERMS_FILE` to be able to control the URL link or file that appears on the publicstudentsignup page. This provides better control over the legal language shared with Learners related to using your Genius instance.

We added a new parameter called `ENROLLMENT_STATUS_TOWARDS_CAP`. It determines what enrollment status(es) count towards the enrollment cap. The default is `ACTIVE,COMPLETED`. You can add any enrollment status separated by comma.



New Features in Release 3.0

We added a new parameter called `LEARNERS_SHOULD_REVIEW_INFO EVERY_X_DAYS`. The value determines the number of days where the learner is forced to validate their learner account information. After logging in, the Learner is taken immediately to their edit account page to correct any account information that may have changed.

We added new parameters called `INVALID_LOGIN_MAX_ATTEMPT` and `INVALID_LOGIN_ATTEMPT_INTERVAL_HOURS`. They determine the number of invalid login attempts before the account is blocked for a designated number of hours. An Admin can unblock the user account before the designated time period is up.

We added a new parameter called `PICTURE_CACHE_EXPIRES_MIN`. It determines the amount of time catalog images are cached in enhance performance on large catalogs.

We added a new parameter `SHOULD_CHARGE_ENROLLMENT_BY_BACKOFFICE` which determines whether we add the section or learning path price to the ledger when enrollment occurs from the admin GUI or an import CSV. If set to false, we only charge learner self-registrations to the ledger. If set to true, any backoffice enrollment will also charge the ledger, and enable the affiliation to make a payment for all its members.

- This parameter affects:
- StudentEnrollInSection
 - StudentLearningPath
 - Bulk Actions
 - PrescriptiveRules
 - Force Enroll
 - Import CSV

New API Endpoint

Based on some client requests, we added a new endpoint to get all sections for a particular course. We also improved some of the data fields we are returning for various API calls.

Changing the Genius Username, Updates LMS Username

In the past, you could change a Genius username, but we would not update the LMS username because some LMS would not allow you to change the username once it was created. Now when you change the Genius username, we update the username in all the LMS that user is enrolled in.

Access Setup for Admin Role

Users with the Admin role should have unrestricted access to all Genius features. Therefore, we have removed the ability to restrict the Admin role from any Genius menu or button. You will no longer see the Admin role under Access Setup.