



PENDO 
MONIUM
2024

PENDOMONIUM 2024

Lightning Talk:

Using your Resource Center to serve users and deliver business results

Nelnet | PointClickCare | Nasdaq





The big no one's talking about

Liz Feller
Nelnet Business Services

Agenda

- **Unpacking a good RC**
 - MLP
 - Custom experiences
- **Iterating on your RC**
 - Style and contents
 - Using metrics
- **NBS Show and Tell**

Unpacking a good RC

MLP

(Minimum Lovable Product)

✓ Empower

✓ Engage

- Knowledge base
 - Contextual help
- Announcements
- Release notes
- Feedback



netnet
CAMPUS COMMERCE

Home Client Manager Refund Manager Reports Admin

Search

Search Criteria

Client

Resource Center

- HubHelp
The full HubHelp experience
- What's New
Enhancements and announcements **2**
- Release Notes
Product and feature highlights
- The Nelnet Quad
Connect with your peers

Reports

- Help
- Batch Plugin Management

Orders

31 Wednesday 1 Thursday 2 Friday 3 Saturday 4 Sunday

Payment Forms

Storefront

Contact Support
866-315-1263
NCC_CustomerSupport@netnet.net

Institution Support
866)315-1263
Student Support
(800)609-8056

Payments Collected
Summer Header 2025
No records to display

Payment Plan Status
Summer Header 2025
No records to display

Past Due Payment Plan Co
Summer Header 2025
No records to display

As of: 08/06/2024 12:22 PM

Latest Orders [View All Orders](#)

Resource Center

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PENDOMONIUM 2024

Unpacking a good RC

Custom experiences
(our products are special!)

✓ Segmentation

✓ Product maturity

- Access to specific info
- Onboarding modules
- Tone and voice



Resource Center

- HubHelp**
The full HubHelp experience >
- What's New** 2 >
Enhancements and announcements
- Release Notes** >
Product and feature highlights
- The Nelnet Quad** >
Connect with your peers

? 2

FACTS My Profile Customer Service

Lincoln Academy of FACTS (34558)

Home Grant & Aid Forms Payment Activity Notices Admin Reports Signed in as Liz

Dashboard

Search Agreement Number Go Advanced Search

Term(s) Edit Term Sort Order
2019-2020 School 1st Refresh School User

Announcements

No announcements to display

Payments Collected

2019-2020 School 1st

As of: 08/14/2024 3:18 PM

100.0% Payment Plans \$1,000.00 100.0%

Contacts

Institution ID

K12 Institution Support
Account Manager
Payment Plans
k12institutionsupport@factsmgt.com

Institution Support
(866)412-4637
Customer Support
(866)441-4637

1 of 3

Payment Plan Status

2019-2020 School 1st

As of: 08/14/2024 3:18 PM

?



Client

Resource Center

- HubHelp
The full HubHelp experience >
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?

Home

Premier Academy
2024-2025 | Qtr1

?

LF

Calendar

Date: 08-11-2024 - 08-17-2024

Wednesday, Aug 14, 2024

No events have been scheduled for this week.

PREV NEXT

Announcements

- Prepare for Fall**
Fall is in the air. Summer will be over in just a few weeks and ...
- It's time to Enroll in Summer Camp**
It's time to enroll your students for Summer Break Sports ...

FACTS^Space

Join the Crew!

Join Our Crew!

Want to give Product Feedback?

Please [set up your FACTS^SPACE account](#), then navigate over to the [Product Feedback area](#) where you can vote on ideas already submitted, or submit your own. While you're there, join a few communities! We have 3000+ FACTS users in FACTS^SPACE, talking about everything from classroom management to school dismissal. Join the conversation!



Resource Center

- HubHelp
The full HubHelp experience >
- What's New
Enhancements and announcements **2** >
- Release Notes
Product and feature highlights >
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Connect with your peers >

? **2**

Aspire Academy | Dashboard | Profiles | App | Forms | Giving | Messaging | Reports | Log Out

Total	Web i	App	Text i	Form	Portal
\$92,860	\$156	\$0	\$9	\$329	\$91,652

View your giving-related links.

Monthly | From... | To...

Viewing all-time giving statistics grouped monthly.

Top 15 Funds

Fund Name	Relative Contribution
General Fund	High
Backpack	Medium-High
East B	Medium
Scholarship Fund 19-20	Low-Medium
Bleacher Fund	Low

1

Iterating on your RC

Style and contents

- ✓ Products change
- ✓ Users and needs change

- Look and feel
- Notifications
- Streamlining content






Resource Center ✕

HubHelp >
The full HubHelp experience

What's New 1 >
Enhancements and announcements

Release Notes >
New product features and updates

The Nelnet Quad >
Connect with your peers





All Product Areas ▾ Event ▾ All Statuses ▾ Automatically ▾

Guides (63)

Group Enrollment

Instructor Assignments ▾

Schedule by Course

Schedule by Student

Schedule by Study Hall

Quick Links

Courses

Classes

Day Setup

? Student Life Management Webinar X

Join Reach and FACTS for an insightful webinar on **January 31st at 2:00pm CST**. A special focus will be placed on Reach's seamless integration with FACTS, creating a powerful synergy that further enriches the user experience.

- Explore Reach's purpose-built features for schools and camps
- Gain insights into automated control over all student activities
- Detailed demo of key modules, including
 - Students SISO (Sign In - Sign Out)
 - Student Wellness - Pastoral Notes
 - Emergency Response

Remind me tomorrow

Register



< Webinars X



FACTS WEBINAR

Navigating Admissions:
5 Key Priorities

Robin Parrish



Watch a brief, 25-minute webinar where Robin Parrish, an Enrollment Management Specialist, highlights the

PENDOMONIUM 2024



Resource Center

- HubHelp**
The full HubHelp experience >
- What's New**
Enhancements and announcements 1 >
- Release Notes**
New product features and updates >
- Sign up for Training**
Live and on-demand webinars >

Resource Center

- Support & Training
- Helping
- Introduction of Productivity
- What's New
- Release Notes
- Sign up for Training
- Training and How to Watch
- Helping
- FACTORYSPACE
- Feedback Tools
- Customer Experience
- Deployment of New
- End of Year
- End of Year for Services
- End of Year for Admins
- Google Classroom End of Year
- End of Year Student Billing
- End of Year Renewal Billing
- End of Year Billing
- Producing Progress Reports
- Producing Report Cards
- Producing Transcripts
- Clear Desk & Leave List
- Google Classroom for Teachers
- Google Classroom for Admins
- Get the Numbers
- Get the Address
- Working on Quizzes
- Addressing Student Data
- Addressing Help
- Introduction of System
- Division of Labor
- Learning Schools of Security and Safety
- Introduction of Content
- Learning Schools of Curriculum
- Learning Schools of Instruction
- Helping
- Helping





Calendar

Date (08-11-2024 - 08-17-2024)

Wednesday, Aug 14, 2024

No events have been scheduled for this week.

PREV

NEXT

Announcements



Prepare for Fall

Fall is in the air. Summer will be over in just a few weeks and...



It's time to Enroll in Summer Camp

It's time to enroll your students for Summer Break Sports...

FACTS^Space



Join Our Crew!

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Iterating on your RC

Using metrics

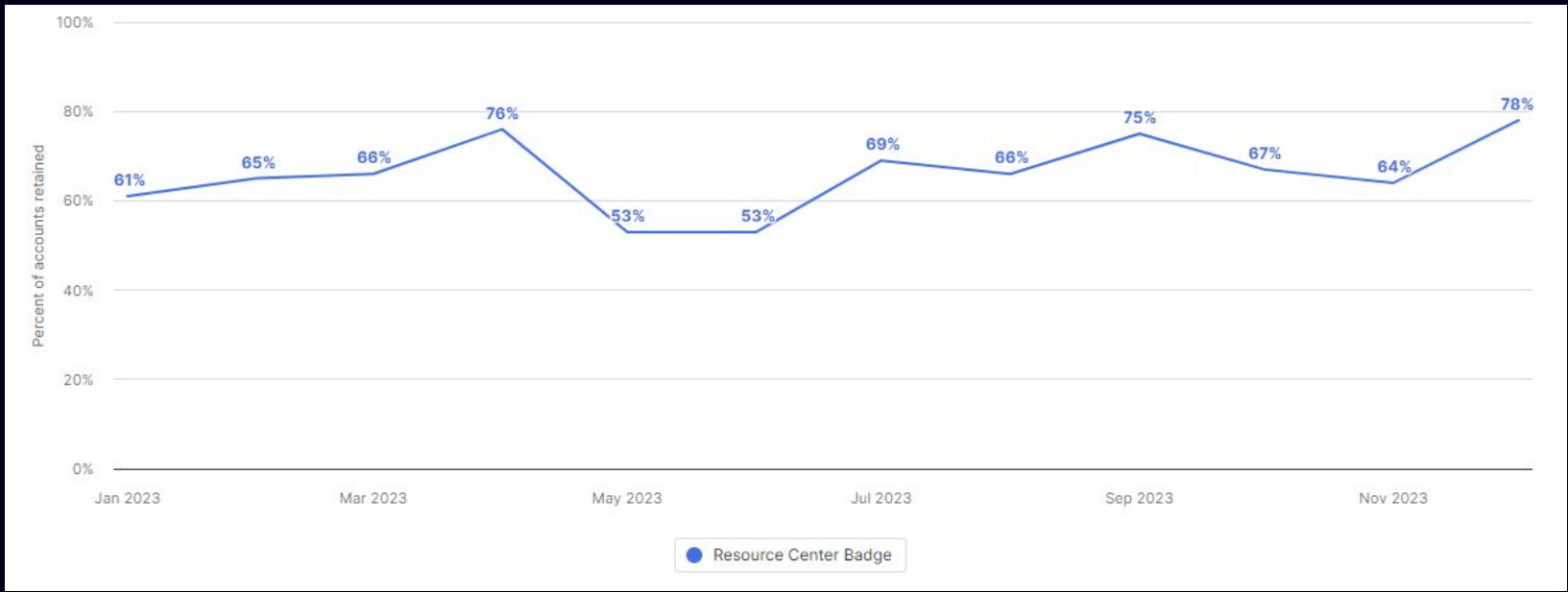
✓ Quantitative

✓ Qualitative

- Engagement
- Impact
- Sentiment
- ROI

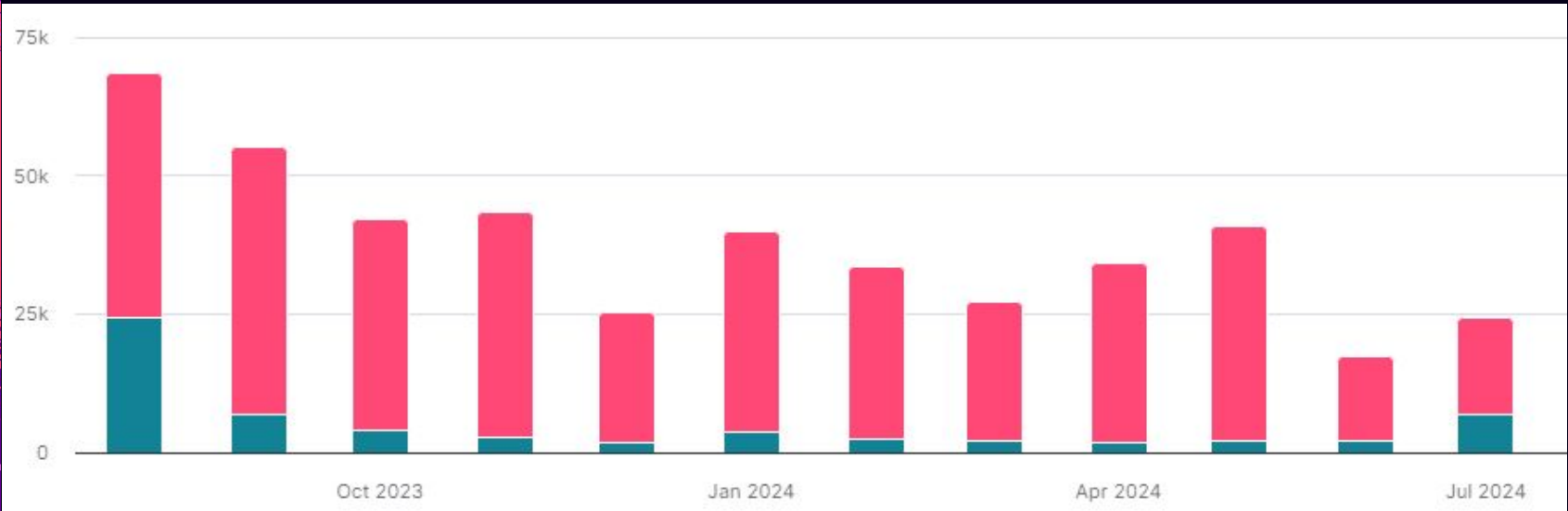


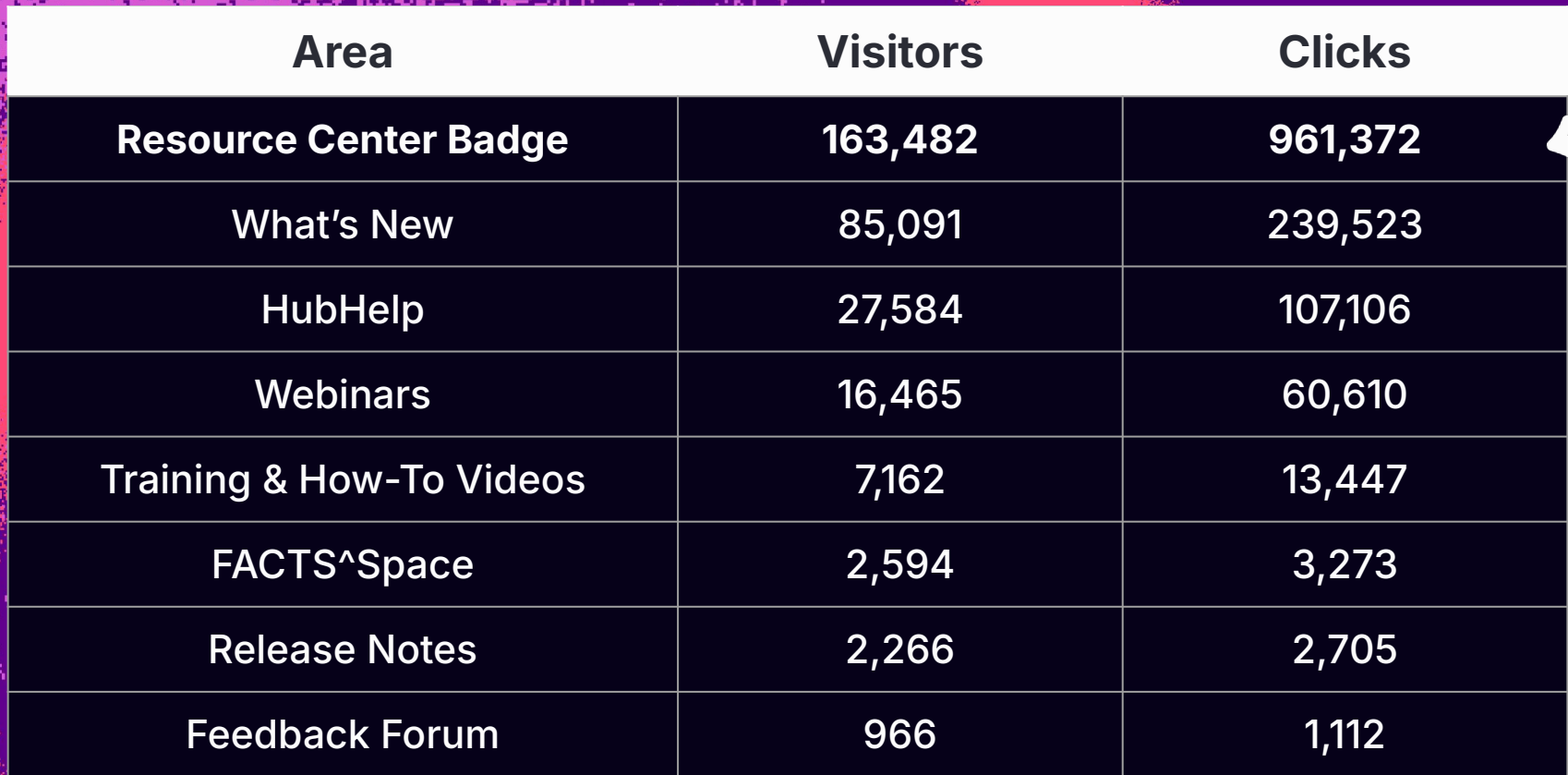
Resource Center monthly account retention





Resource Center views by visitor





Area	Visitors	Clicks
Resource Center Badge	163,482	961,372
What's New	85,091	239,523
HubHelp	27,584	107,106
Webinars	16,465	60,610
Training & How-To Videos	7,162	13,447
FACTS^Space	2,594	3,273
Release Notes	2,266	2,705
Feedback Forum	966	1,112



Resource Center

- HubHelp
The full HubHelp experience
- What's New 1
Enhancements and announcements
- Release Notes
New product features and updates
- Sign up for Training
Live and on-demand webinars




Resource Center

- Support & Training
HubHelp, live trainings, and more
- Webinars & Events
Demos, thought leadership, and more
- Product Updates 13
Enhancements and announcements
- Feedback
Share your product improvement ideas



Support & Training

SELF-SERVICE SUPPORT
Visit HubHelp for quick how-to articles, videos, permissions lists, and more.

 [HubHelp](#)

[Guided Walkthroughs](#)

[FACTS Status Page](#)

LIVE & RECORDED TRAININGS
Enhance your knowledge and skills with FACTS training offerings.

[Register for a live training](#)
[Watch trainings on-demand](#)

THE FACTS COMMUNITY
Connect with your Crew and other schools on our community platform!

[FACTS^oSPACE](#)



NBS Show and Tell

Lincoln Academy of FACTS

Home My Profile Financial Accounts

Select a Different Institution

Hello John

Payment Plan & Billing [View Details](#)

John Silver #5003232542
For Testy Test

Current Balance
Pending

2023-2024 SCHOOL YEAR
Payment Plan (101 155 131) [Actions](#) **AMOUNT DUE**
Pending

Plan owned by John Silver

Pending - This agreement is waiting to be finalized by the institution. After this agreement is finalized, a confirmation notice will be sent from us listing the amount owed and the payment schedule.

2022-2023 SCHOOL YEAR
[Set up a Payment Plan](#)

Set up a Payment Plan

FACTS Grant & Aid

No application on file for this institution.

[Start Application](#)

2023-2024 SCHOOL YEAR
 Application ID 1696026

Incomplete - Please continue with your application form

[Continue FACTS Application](#)

PRIOR APPLICATION
 2020-2021 School Year - Application ID 1695213

Other Services

Sign up for student accident insurance through Assurity. Click the link below to sign up.

[Assurity Accident Insurance](#)

John Silver

- testaccount123@factsmgt.com
- Register to receive text services on your mobile phone
- Three Financial Accounts on file
- Want to allow a friend or family member to pay toward your balance?
Add an Authorized Party



**External users who
aren't new and
haven't used the
Resource Center in
the last six months**

78% adoption



Hello Liz

Hello!
I'm here to help

- Update my username or password
- Update or add a financial account
- Change my payment plan
- Verify my current balance

Close

Prepay Accounts View Details

John Silver #5003232542
For Testy Test

Add Funds

2024-2025 SCHOOL YEAR	BALANCE
Before & After Care - John Silver	\$0.00
Before & After Care - Testy Test	\$0.00
Prepay Account - John Silver	\$0.00

FACTS Grant & Aid

2024-2025 SCHOOL YEAR

Application ID 1696738

Incomplete - Please continue with your application form.

Continue FACTS Application

PRIOR APPLICATION

2023-2024 School Year - Application ID 1696026

Liz Feller

liz.feller@neinet.net

Register to receive text services on your mobile phone.

Two Financial Accounts on file

Want to allow a friend or family member to pay toward your balance?
Add an Authorized Party.

Have another activity you want to link?

Payment Plan
John Silver
For Testy Test

2024-2025 SCHOOL YEAR

2023-2024 SCHOOL YEAR

Payment Plan

Pending - This agreement is waiting to be finalized by the institution. After this agreement is finalized, a confirmation notice will be sent from us listing the amount owed and the payment schedule.

Payment Plan (101 155 131) | Actions

Pending - This agreement is waiting to be finalized by the institution. After this agreement is finalized, a confirmation notice will be sent from us listing the amount owed and the payment schedule.

Set up a Payment Plan

Other Services

Kids are always active —playing soccer, basketball, baseball, or just on the playground. Injuries like broken arms, sprained ankles, torn ACLs, dislocated fingers, or concussions can occur suddenly. Additionally, motor vehicle accidents are a concern for parents everywhere.

Student Accident & Sports Injury Insurance

Application Form

APPLICATION ID: 1696738
2024-2025

Hello!
I'm here to help

- What documents do I need?
- What happens next?

Close

- 7 Nontaxable Income
- 8 Change of Income
- 9 Monthly Expenses
- 10 Annual Expenses
- 11 Assets & Liabilities
- 12 Additional Questions
- 13 Review
- 14 Submit

Taxable Income

* Number of children living in this household?
Select...

* Does Liz Feller receive income reported on a W-2?
 Yes
 No

* Does Elizabeth Feller receive income reported on a W-2?
 Yes
 No

* Does Liz Feller file a U.S. Federal Income Tax Return?
 Yes
 No

* Does Elizabeth Feller file a U.S. Federal Income Tax Return?
 Yes - files jointly
 Yes - files separately
 No

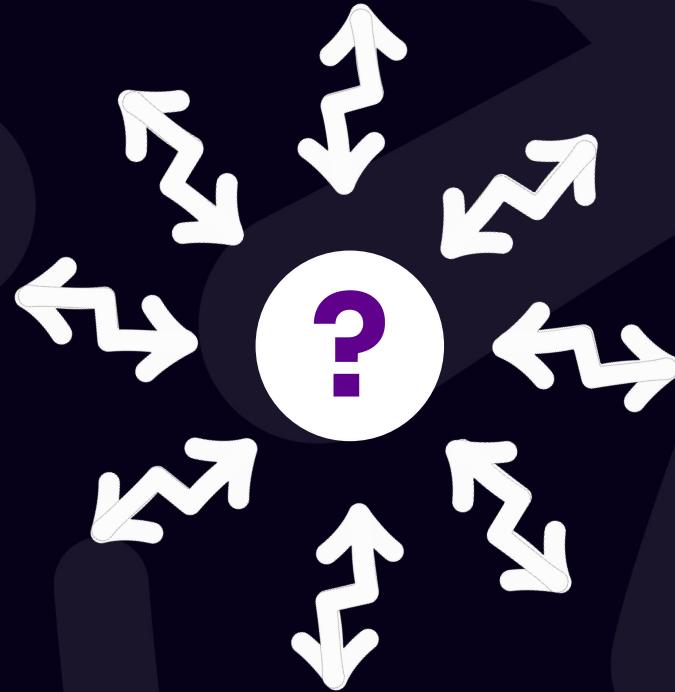
Do you own any of the following?

- Business
- Rental Property
- Partnership
- Farm
- S Corporation
- Estates and Trusts

Previous **Save & Continue** **Save & Exit**

What's next for NBS?

Evolve and experiment





PENDO
MONIUM
2024



Pushing the limits with Resource Center

PointClickCare

PENDOMONIUM 2024



Kelsey Drillen

Director, Content Design
PointClickCare

LinkedIn: [Kelsey Drillen](#)

Email: Kelsey.d@pointclickcare.com



Emma Pindera

Content Strategist
PointClickCare

LinkedIn: [Emma Pindera](#)

Email: Emma.pindera@pointclickcare.com



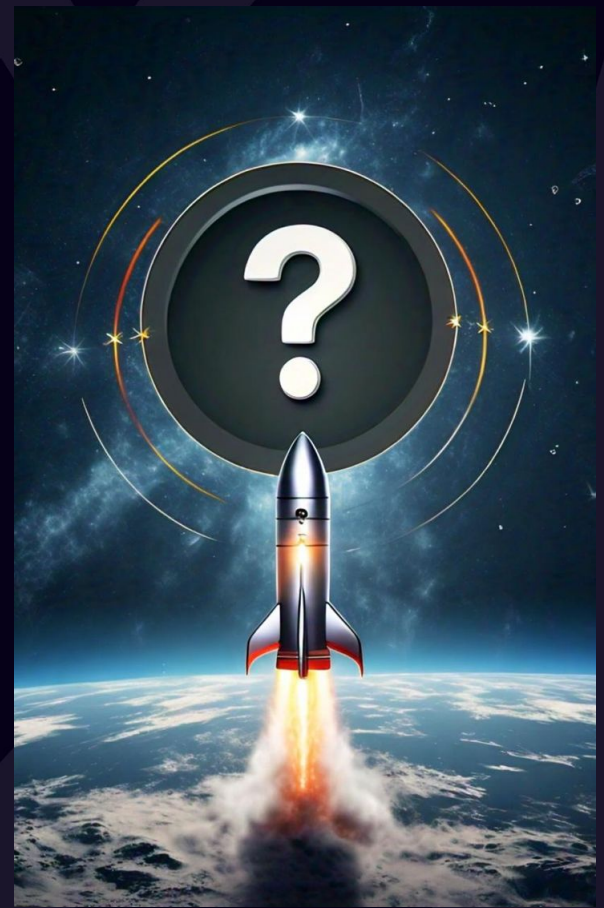
Overview

PointClickCare creates a world in which providers can confidently deliver on frictionless care with real-time insights.



Resource Hub

The Resource Hub is a one-stop-shop for all the information our users need in the line of working, empowering them to care confidently.





Resource Hub User Experience

Pushing the Limits

The Problem:

- **Need context-sensitive resources on each page**

The Solution:

- **Code Sandbox Module (Train Me)**
- **Excel macro that is easy to update by the entire content team**



Train Me



[Log in](#) before you select a training course.

Search for courses

[eCourse: Enhanced Reporting Experience](#)

[eCourse: Go Live Census for Canada](#)

[eCourse: Managing Electronic Funds Transfer](#)

[eCourse: PointClickCare - The Basics](#)

[eCourse: Resident Entry](#)

[eCourse: Statement Billing for Canada](#)

[eCourse: Tax Letters](#)

[Live: Dashboards and Reports for Nurse Management](#)

[SmartZone](#)



A	B	C	D	E	F	G	H	I	J
Status	Application	Submodule	Resource Hub Title - Do NOT change titles without adding a new Feature Rule	SNF/SL/AN Y	US/CA/AN Y	Smartzone Page	PCC App Pages (comma separated)	PCC Element (optional)	Internal Notes
Active	Core	Orders	eCourse: Introduction to Integrated Medication Management (IMM)	ANY	ANY	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-CSNF-0076	/clinical/ordersChart.xhtml, /clinical/ordersPortal.xhtml		
Active	Core	Orders	eCourse: Introduction to Orders in PointClickCare	ANY	ANY	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-CSNF-0070	/clinical/ordersChart.xhtml, /clinical/ordersPortal.xhtml		
Active	Core	Results	eCourse: Laboratory and Radiology Integrated Orders	ANY	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-CSNF-207	/clinical/lab/labResults.xhtml		
Active	Core	Late Fee Management	eCourse: Late Fee Management End User	SNF	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-FSNF-0124	/admin/client/cp_usarprofile, /admin/billing/batchlist		
Active	Core	Resident Setup	eCourse: Late Fee Management End User for Senior Living	SL	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-FSL-0125	/admin/client/cp_usarprofile, /admin/billing/billportal_us		
Active	Core	Late Fee Management	eCourse: Late Fee Management Setup	SNF	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-FSNF-0013	/admin/setup/roleslist, /admin/billing/latefee/list.xhtml		
Active	Core	Late Fee Management	eCourse: Late Fee Management Setup for Senior Living	SL	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-FSL-0124	/emc/standards, /admin/setup/eadminsetup		
Active	Core	Leave Tracking	eCourse: Leave Tracking	SNF	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-FSNF-0076	/enterprisereporting/listing.xhtml, /admin/admindashboard, /admin/setup/facilityconfig, /admin/setup/billingconfig, /admin/billing/bedholdrule/show.xhtml, /admin/setup/payeredit, /admin/client/cp_usarprofile, /profile/censusrates/admindisplay.xhtml		
Active	Core	Leave Tracking	eCourse: Leave Tracking For Senior Living	SL	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-FSL-0041	/enterprisereporting/listing.xhtml, /admin/admindashboard, /admin/setup/facilityconfig, /admin/setup/billingconfig, /admin/billing/bedholdrule/show.xhtml, /admin/setup/payeredit, /admin/client/cp_usarprofile, /profile/censusrates/admindisplay.xhtml		
Active	Core	Limiting Transaction Generation	eCourse: Limiting Transaction Generation	SNF	US	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-CSNF-0164	/emc/admin/setup/billingconfig.xhtml		
Active	Core	IMM	eCourse: Maintaining Your Orders Portal with IMM	ANY	ANY	//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-CSNF-0076	/clinical/ordersPortal.xhtml		


```
Microsoft Visual Basic for Applications - [Sheet2 (Code)]
File Edit View Insert Format Debug Run Tools Add-Ins Window Help
Project - VBAProject CommandButton1 Click
VBAProject (TrainMeLin)
Microsoft Excel Objects
Sheet1 (Train Me Lin)
Sheet2 (Generate C)
Sheet3 (js)
Sheet4 (feature)
Sheet5 (Pulse Code)
ThisWorkbook
Modules

Option Explicit

Function EscapeDoubleQuotes(str As String) As String
    EscapeDoubleQuotes = Replace(str, Chr(34), "\" & Chr(34))
End Function

Private Sub CommandButton1_Click()
    'This macro generates the desired JavaScript code to define the links for the PCC Resource Center "Train Me" links
    'The output will need to be copy/pasted into the pendo script tab for "Train Me"
    'If for any reason this code is not working, please reach out to:
    'Stephen Cunliffe (stephen.c@pointclickcare.com) or
    'Kelsey Drillen (kelsey.d@pointclickcare.com)
    'for more info/assistance

    Dim jsData As String
    Dim tempData As String
    Dim dataRange As Range
    Dim columns As Variant
    Dim appPages() As String
    Dim appPageStr As String
    Dim elems() As String
    Dim elemStr As String
    Dim apps() As String
    Dim appsStr As String

    Dim APP_COL As Integer
    Dim STATUS_COL As Integer
    Dim SUBMODULE_COL As Integer
    Dim LINK_TITLE_COL As Integer
    Dim HELP_TYPE_COL As Integer
    Dim REGION_TYPE_COL As Integer
    Dim TRAIN_PAGE_COL As Integer
    Dim APP_PAGES_COL As Integer
    Dim ELEMS_COL As Integer

    Dim rowCount As Integer
    Dim rowCountIndex As Integer

    Dim activeCount As Integer

    'ThisWorkbook.Worksheets("Train Me Links").Activate
    Set dataRange = ThisWorkbook.Worksheets("Train Me Links").UsedRange
    'dataRange.Select

    'output format is:
    'var trainLinkData = [
    ' {
    '   "title": "Admitting Residents",
    '   "app": "Core",
    '   "help_type": "SNF|SL|ANY",
    '   "region": "US|CDN",
    '   "train_page": "some-page.html",
    ' }
    ' ]

```

Generate Train Me Links

```
var trainLinkData = [  
{  
  app:"Core",  
  submodule:"IPC",  
  title:"CDC: Antibiotic Stewardsh  
  help_type:"ANY",  
  region:"US",  
  train_page:"//www.train.org/main  
  pages:"/clinical/ipc/app.xhtml",  
  name:""
```

Instructions / Notes:

1.) Fill in all the link data in the next sheet. Do not reorder the columns. Only enter full rows, if you have temporary data, add it to another sheet.

2.) When ready (at any time) click the button above to generate the JavaScript code needed.

3.) After generating the links, copy this text into the "Script" tab in Pendo. QA>Guides>RC>Train Me>Manage in



Train me w/ Smartzone

HTML

CSS

JavaScript

```
1 (function () {
2   /* Paste "Train me" link data below */
3   var trainLinkData = [
4     {
5       app:"Core",
6       submodule:"IPC",
7       title:"CDC: Antibiotic Stewardship in Nursing Homes Training",
8       help_type:"ANY",
9       region:"US",
10      train_page:"//www.train.org/main/course/1078384/",
11      pages:"/clinical/ipc/app.xhtml",
12      elems:""
13    },
14    {
15      app:"Core",
16      submodule:"IPC",
17      title:"CDC: Nursing Home Infection Preventionist Training",
18      help_type:"ANY",
19      region:"US",
20      train_page:"//www.train.org/cdctrain/training_plan/3814",
21      pages:"/clinical/ipc/app.xhtml",
22      elems:""
23    },
24    {
25      app:"Core",
26      submodule:"IPC",
27      title:"CMS/QSEP: COVID-19 Training for Nursing Homes",
28      help_type:"SNF",
```



Writing ES6-compliant code? Check out our docs for best practices

agrdM_FAC_1

Train Me

[Log in](#) before you select a training course.

Search for courses

[eCourse: Point of Care \(POC\)](#)

[eCourse: PointClickCare - The Basics](#)

[Live: Smartzone Overview for Learners](#)

[Live: Smartzone Overview for Supervisors](#)

[Live: Unlocking the Power of Nursing Advantage: Optimizing Workflows for Enhanced Outcomes](#)

[SmartZone Full Course List](#)

[SmartZone](#)

Pushing the Limits

The Problem:

- **Need a nested Resource Hub**

The Solution:

- **Code Sandbox Module (Train Me) permalinked to a guide (Onboarding Essentials)**
- **Excel macro that is easy to update by the entire content team**



Train Me

[Log in](#) before you select a training course.

Search for courses

[eCourse: Pharmacy Connect - Pharmacy Workspace](#)

[eCourse: Pharmacy Connect - Wellness Workspace](#)

[eCourse: Point of Care \(POC\)](#)

[eCourse: PointClickCare - The Basics](#)

[Live: Smartzone Overview for Learners](#)

[Live: Smartzone Overview for Supervisors](#)

[Live: Unlocking the Power of Nursing Advantage: Optimizing Workflows for Enhanced Outcomes](#)

SmartZone [Onboarding Essentials](#)



Onboarding Essentials

[Log in](#) before you select a training course.

General

[Empower Yourself: SmartZone Learners](#)

[Empower Yourself: Searching the Customer Support Portal](#)

[Empower Yourself: Creating and Managing Cases in the Customer Support Portal](#)

[Empower Yourself: Resource Hub](#)

[Empower Yourself: The Pulse](#)

[PointClickCare - The Basics](#)

Clinical

[Progress Notes](#)


```
4903     for(var i=0;i<listItems.length;i++){
4904         listItems[i].style.display = 'list-item';
4905     }
4906     });
4907 });
4908
4909 //Add Support Links Footer magic for core and pacman
4910 var rhFooterDivHTML = null;
4911 if(thisAppType == 'Core'){
4912 //build the HTML for the footer...
4913
4914 var smartZoneLinkText = "SmartZone";
4915
4916 rhFooterDivHTML = '<div class="RHfooter" id="RHfooter"><div class="RHcontent"><p align="center"><a
4917 href="//training.reliaslearning.com/Learning/CurrentTraining.aspx" target="_blank">' + smartZoneLinkText + '</a> | <a id="onboardingLink" href="?"
4918 pendo=laUKUrh0FcckfCCXb_aWJg4ABUM">Onboarding Essentials</a></p></div></div>';
4919
4920 }
4921
4922 if(rhFooterDivHTML != null){
4923 //add the footer to the DOM...
4924 var rhFooterContainer = document.getElementById('RHfooterContainer');
4925 var sandboxContainer = rhFooterContainer.parentNode;
4926
4927 //rhFooterContainer.innerHTML = rhFooterDivHTML;
4928 rhFooterContainer.innerHTML += rhFooterDivHTML;
4929
4930 sandboxContainer.className += 'footerApplied';
4931
4932 }
4933
4934 }
4935
4936 }
4937
4938 }
4939
4940 }
4941
4942 }
4943
4944 }
4945
4946 }
4947
4948 }
4949
4950 }
4951
4952 }
4953
4954 }
4955
4956 }
4957
4958 }
4959
4960 }
4961
4962 }
4963
4964 }
4965
4966 }
4967
4968 }
4969
4970 }
```



Writing ES6-compliant code? Check out our docs for best practices

Onboarding_Tile

Clear guide data Staged ...

PointClickCare No Product Area No Guide Category

Created by emma.pindera@pointclickcare.com | Last updated by emma.pindera@pointclickcare.com

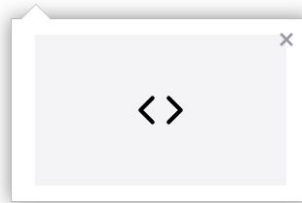
Add a description

Settings Guide Metrics

Content

Viewing: English (US)

[Preview](#) [Manage in my app](#)



Page: Sitewide

Guide Goal



No guide goal set

Activation

[Manage in my app](#)



TARGET ELEMENT

Segment

[Edit](#)

167

ELIGIBLE VISITORS





agrdM_FAC_1 - ?

Edit Code

HTML

CSS

Javascript

```
1 (function(){
2   /* Paste "Train me" link data below */
3   var trainLinkData = [
4   {
5     app:"Core",
6     submodule:"Any",
7     title:"Empower Yourself: SmartZone Learners",
8     help_type:"ANY",
9     region:"ANY",
10    train_page:"//training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=PCC-1000",
11    pages:""
12  },
13  {
14    app:"Core",
15    submodule:"Any",
16    title:"Empower Yourself: Searching the Customer Support Portal",
17    help_type:"ANY",
18    region:"ANY"
19  }
20 ]
21 }
```

i Code can affect any content and styles rendered in the current view of the browser, including building blocks. Therefore, only 1 code block is allowable per step.

Writing ES6-compliant code? [Check out our docs for best practices](#)

Cancel Done

X

Onboarding Essentials

[Log in](#) before you select a training course.

General

- [Empower Yourself: SmartZone Learners](#)
- [Empower Yourself: Searching the Customer Support Portal](#)
- [Empower Yourself: Creating and Managing Cases in the Customer Support Portal](#)
- [Empower Yourself: Resource Hub](#)
- [Empower Yourself: The Pulse](#)
- [PointClickCare - The Basics](#)

Clinical

[Progress Notes](#)

Pushing the Limits

The Problem:

- **Need notifications only for announcements**

The Solution:


- **Code Sandbox Module (Enroll Me)**
- **Designed to look like an announcements module**
- **Excel macro that is easy to update by the entire content team**



< **Enroll Me** ×

[Log in](#) before selecting instructor-led training.


🔍 Search for training



Admissions, Discharges, Transfers, and Room Changes

Learn to add new residents, enter census changes, and complete room transfers.

[View session dates](#)






```
Enroll Me - UNDER CONSTRUCTION

HTML CSS JavaScript

1 ol._pendo-text-list-ordered{
2   border-color:rgb(218, 220, 229);
3   border-style:solid;
4   border-width:1px 0 0;
5   float:none;
6   height:352px;
7   list-style-position:inherit;
8   margin:0;
9   overflow:hidden auto;
10  padding:16px 16px 0;
11  vertical-align:baseline;
12 }
13 ol._pendo-description{
14   /*Font size & style*/
15 }
16 ol._pendo-text-list-ordered li{
17   background: #F4F4F7;
18   border:0 solid #fff;
19   float: none;
20   list-style-type:none;
21   list-style-position:inside;
22   margin-bottom:10px;
23   margin-left:0;
24   padding:8px 8px 4px 8px;
25   position:relative;
26   vertical-align:baseline;
27 }
28 ol._pendo-text-list-ordered li a{
29   color:#05576F !important;
30   display:inline;
31   float:none;
32   font-size:inherit;
33   font-weight:400;
34   letter-spacing:inherit;
```

Enroll Me


[Log in](#) before selecting instructor-led training.



Admissions, Discharges, Transfers, and Room Changes

Learn to add new residents, enter census changes, and complete room transfers.

[View session dates](#)



Pushing the Limits

The Problem:

- **Need access to SSO-enabled Customer Support Portal and Customer Community**

The Solution:

- **Code Sandbox Modules (Customer Support Portal and Connect Me)**
- **Pendo Github code AND SSO link details**



Resource Hub



News and Updates

Product | Regulatory | Announcements

3



Customer Support Portal

Search for Answers | Manage Cases



Guide Me

Interactive Assistance



Train Me

Courses



Enroll Me

Instructor-Led Training



Connect Me

Pulse Online Community



A white smartphone is shown from a top-down perspective, lying on a light-colored surface. The screen displays a blurred interface with various colored elements and text.

How can we help you today?

 Search for answers

 **Tell us how we're doing!** 

Connect with us by scanning the QR code or clicking the image below to share your feedback.
Your perspectives are invaluable in improving our support services!





Support Me

HTML

CSS

JavaScript

```
1 (function resourceCenterOpenURL() {
2
3     var supportMeLink = localStorage.getItem("CORE.sfCommunityLink") || sessionStorage.getItem("CORE.sfCommunityLink") ||
4     "https://support.pointclickcare.com";
5     /*Production Link after Pipes*/
6
7     var host = location.host;
8
9     var subdomain = host.substr(0, host.indexOf('.'));
10
11     var qaHosts = {
12         "mca":1,
13
14         "mus":1,
15
16         "qac":1
17
18     };
19
20     var sseHosts = {
21
22         "sse-dev":1,
23
24         "sse-qa":1,
25
26         "enable":1,
27
28     };
```



Writing ES6-compliant code? Check out our docs for best practices

Customer Support Portal



Pushing the Limits

The Problem:

- **Need more instructions and information in each tile**

The Solution:

- **Code Sandbox Modules (News and Updates, Train Me, and Enroll Me)**
- **Add code to Sandbox Module to add microcopy**

OR

- **Add code block to announcement to style as microcopy**



News and Updates

Subscribe to [PointClickCare System Status](#) to receive outage notifications.

4.4.35 Product Update

Review the [4.4.35 Product Update](#) to see what's new in this release.

4.4.34 Product Update

Review the [4.4.34 Product Update](#) to see what's new in this release.

4.4.33 Product Update

Review the [4.4.33 Product Update](#) to see what's new in this release.

Product News ⓘ

Announcements Module

Content Edit					
Name	Status	Localization Status	Segment	Start Date	
KEEP AT THE TOP	● Public	✓ Fully translated	Everyone	Apr 9, 2024 12:34pm EDT	



Edit Code

HTML

CSS

Javascript

```
1 margin-top:-14px !important;  
2 margin-left:-20px !important;
```

News and Updates

Subscribe to [PointClickCare System Status](#) to receive outage notifications.

<>

i Code can affect any content and styles rendered in the current view of the browser, including building blocks. Therefore, only 1 code block is allowable per step.

Cancel

Done

Pushing the Limits

The Problem:

- **Need users for usability testing of Early Access products**

The Solution:

- **Code Sandbox Module (Early Access)**
- **Excel macro that is easy to update by the entire content team**
- **Permalinked to a guide with an embedded Smartsheet form**



Early Access



By applying for an Early Access product, you work directly with the PointClickCare product team to help shape future products.

Learn more: [Early Access Overview](#)

Advanced Immunizations

Elevate your experience with Advanced Immunizations by applying for early access and contribute to refining its new look and feel. Your valuable feedback will play a crucial role in creating a streamlined workflow for managing resident immunization information.

APPLY



Created By
ong Nam
ong Nam
ong Nam
ong Nam



Advanced Immunizations

Full Name *

Job Title *

Organization *

Facility/Community Name *

Email *

Phone Number *



```
1 (function(){
2   /* Paste "Early Access" link data below */
3   var earlyAccessLinkData = [
4
5   {
6     submodule:"ILT",
7     prod_area:"Clinical",
8     title:"Advanced Immunizations",
9     desc:"Elevate your experience with Advanced Immunizations by applying for early access and contribute to refining its new look and feel. Your
10    valuable feedback will play a crucial role in creating a streamlined workflow for managing resident immunization information.",
11     help_type:"ANY",
12     region:"US",
13     pendo_guide:"?pendo=C0mniwdrANgjr5z40NF05zVJ1eA&step=07cXyJBVI8SmK5YRcWZP7r6_Vsc",
14     pages:"",
15     elems:"",
16   }
17 ]
18 /* Paste "Early Access" link data above */
19
20 /* Utility code below */
21
22   var links = earlyAccessLinkData;
23
24   var helpType = 'SMF';
25   if(typeof(window.facilityProperties) != 'undefined' && typeof(window.facilityProperties.help_type) != 'undefined'){
26     helpType = window.facilityProperties.help_type;
27   }
```



Writing ES6-compliant code? Check out our docs for best practices

Early Access

By applying for an Early Access product, you work directly with the PointClickCare product team to help shape future products.

Learn more: [Early Access Overview](#)

Advanced Immunizations

Elevate your experience with Advanced Immunizations by applying for early access and contribute to refining its new look and feel. Your valuable feedback will play a crucial role in creating a streamlined workflow for managing resident immunization information.

APPLY

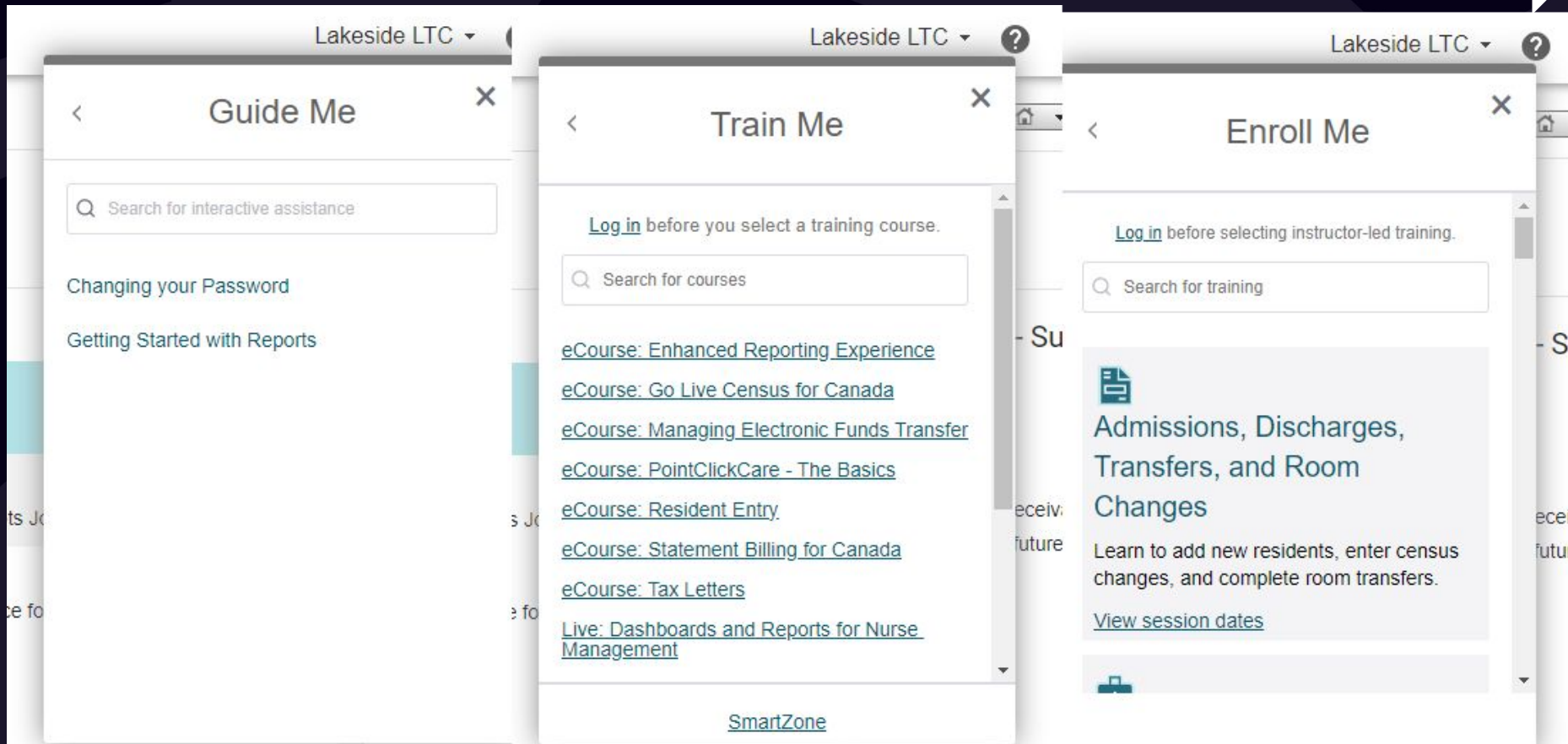
Pushing the Limits

The Problem:

- **Make resources easier to find**

The Solution:

- **Code Sandbox Modules (Train Me and Enroll Me)**
- **Search field to search for content**





agrdM_FAC_1 ?

Train me w/ Smartzone

HTML

CSS

JavaScript

```
4902 }
4903 return linkUrl;
4904 };
4905
4906 var container = document.getElementById(
4907   "_pendo-resource-center-custom-module-trainme"
4908 );
4909 var linkHTML =
4910   '<col id="_pendo-module-topics" class="_pendo-text-list-ordered _pendo-resource-center-guidelist-module-list">';
4911 linkHTML +=
4912   '<span style="color:rgb(119,119,119);display:block;font-size:10pt;padding:0px 8px 8px 8px; text-align:center"> <a href="'+
4913   smartZoneLink +
4914   '" target="win_ext_smarzone" style="color: #05576F">Log in</a> before you select a training course.</span>';
4915 linkHTML +=
4916   '<input type="text" id="_pendo-search-topics" placeholder="Search for courses"/>';
4917 linkHTML +=
4918   '<div id="_pendo-no-matches-container" class="_pendo-no-matches-container" style="display:none;">';
4919 linkHTML += '<div class="_pendo-no-match-heading">No results found.</div>';
4920 linkHTML +=
4921   '<div class="_pendo-no-match-notes">Try searching a different keyword or check the spelling of your current entry.</div>';
4922 linkHTML += "</div>";
4923 var link;
4924 var helpType = "SNF";
4925 if (
4926   typeof window.facilityProperties != "undefined" &&
4927   typeof window.facilityProperties.help_type != "undefined"
4928 ) {
4929   helpType = window.facilityProperties.help_type;
4930 }
```



Writing ES6-compliant code? Check out our docs for best practices

Train Me

Log in before you select a training course.

[eCourse: Point of Care \(POC\)](#)[eCourse: PointClickCare - The Basics](#)[Live: Smartzone Overview for Learners](#)[Live: Smartzone Overview for Supervisors](#)[Live: Unlocking the Power of Nursing
Advantage: Optimizing Workflows for Enhanced
Outcomes](#)[SmartZone Full Course List](#)[SmartZone](#)

```
4943 linkHTML += "</ol>";
4944 container.innerHTML = linkHTML;
4945 var searchInput = document.getElementById("_pendo-search-topics");
4946 var noResults = document.getElementById("_pendo-no-matches-container");
4947 var listItems = document.querySelectorAll("#_pendo-module-topics li");
4948 searchInput.addEventListener("input", function (e) {
4949     var keyword = this.value;
4950     if (keyword != "") {
4951         keyword = keyword.toLowerCase();
4952         var matchCount = 0;
4953         //show matches, hide misses
4954         var listItem;
4955         var textContent;
4956         for (var i = 0; i < listItems.length; i++) {
4957             listItem = listItems[i];
4958             textContent = listItem.innerText.toLowerCase();
4959             if (textContent.indexOf(keyword) != -1) {
4960                 listItem.style.display = "list-item";
4961                 matchCount++;
4962             } else {
4963                 listItem.style.display = "none";
4964             }
4965         }
4966         if (matchCount == 0) {
4967             noResults.style.display = "block";
4968         } else {
4969             noResults.style.display = "none";
4970         }
4971     } else {
```



Writing ES6-compliant code? Check out our docs for best practices

Pushing the Limits

The Problem:

- **Make resources easier to find (based on user feedback)**

The Solution:

- **Code Sandbox Module (Resource Toolkit)**
- **All resources in 1 tile sectioned by title, with a search field to easily search ALL content**



Resource Hub



News and Updates

Product | Regulatory | Announcements



Customer Support Portal

Search for Answers | Manage Cases



Guide Me

Interactive Assistance



Train Me

Courses



Enroll Me

Instructor-Led Training



Connect Me

Pulse Online Community



Resource Hub



News and Updates

Product | Regulatory | Announcements



Customer Support Portal

Search for Answers | Manage Cases



Resource Toolkit

Instructor-Led Training | Help Files | eCourses



Enroll Me

Instructor-Led Training



Connect Me

Pulse Online Community





Resource Toolkit



Search for answers

Getting Started

Tutorials that provide you an overview of a product or feature.

[Getting Started with CRM Leads](#)

Interactive Walkthroughs

Task assistance to take you step by step through the process, so you can complete it yourself.

[Adding a Lead Resident](#)

[Adding a Lead Contact](#)

[Customizing the Lead Listing](#)

Help Files



	A	B	C	D	E	F	G	H	I	J
	Stat	Applic	Submodule	Resource Hub Title - Do NOT change titles without adding a new Feature Rule	SNF	US/C	Smartzone/Help File/Guide Link	PCC App Pages (comma separated)	PCC Element (optional)	Category
57	Active	Core	CRM	Manage Activities	ANY	ANY	/managing-activities.html	/scrm/activity/calendar.shtml		HF
58	Active	Core	CRM	Identify High Risk	ANY	ANY	/identifying-high-risk.html	/scrm/lead/details.shtml		HF
59	Active	Core	CRM	Complete Additional Information	ANY	ANY	/completing-additional-information.html	/scrm/lead/details.shtml		HF
60	Active	Core	CRM	Complete Mandatory Activities	ANY	ANY	/completing-mandatory-activities.html	/scrm/lead/details.shtml		HF
61	Active	Core	CRM	Add Predefined Activities	ANY	ANY	/adding-predefined-activities.html	/scrm/lead/details.shtml		HF
62	Active	Core	CRM	Print Activity Notes	ANY	ANY	/printing-activity-notes.html	/scrm/lead/details.shtml		HF
63	Active	Core	CRM	Lead History	ANY	ANY	/viewing-lead-history.html	/scrm/lead/details.shtml		HF
64	Active	Core	CRM	Add and Upload Misc Documents	ANY	ANY	/adding-and-uploading-misc-documents-for-a-lead.html	/scrm/lead/details.shtml		HF
65	Active	Core	CRM	Lead Listing Display Filters	ANY	ANY	/using-the-lead-listing-display-filters.html	/scrm/lead/list.shtml		HF
66	Active	Core	CRM	Manage the Account Listing	ANY	ANY	/managing-the-accounts-listing.html	/scrm/accounts.shtml		HF
67	Active	Core	CRM	Create an Account	ANY	ANY	/managing-an-account.html	/scrm/accounts.shtml		HF
68	Active	Core	CRM	Add a Contact for an Account	ANY	ANY	/adding-contacts-for-an-account.html	/scrm/accounts.shtml		HF
69	Active	Core	CRM	Manage Leads for a Contact	ANY	ANY	/managing-leads-for-an-account.html	/scrm/accounts.shtml		HF
70	Active	Core	CRM	Create Activities for an Account	ANY	ANY	/creating-activities-for-an-account.html	/scrm/accounts.shtml		HF
71	Active	Core	CRM	Sync the Activity Calendar QRG	ANY	ANY	/setting-up-and-syncing-crm-activities-calendar-quick-reference-guide.html	/scrm/activity/calendar.shtml		HF
72	Active	Core	CRM	Manage the Contact Listing	ANY	ANY	/customer-relationship-management--crm--contacts.html	/scrm/contacts.shtml		HF
73	Active	Core	CRM	Manage Leads for a Contact	ANY	ANY	/managing-leads-for-a-contact.html	/scrm/contacts.shtml		HF
74	Active	Core	CRM	Add an Account for a Contact	ANY	ANY	/adding-accounts-for-a-contact.html	/scrm/contacts.shtml		HF
75	Active	Core	CRM	Create a Custom Dashboard	ANY	ANY	/creating-custom-dashboards-	/scrm/dashboard.shtml		HF
76	Active	Core	CRM	Activities by Status (System) Dashboard	ANY	ANY	/activities-by-status--system--dashboard.html	/scrm/dashboard.shtml		HF
77	Active	Core	CRM	Conversion Rate by Community (System) Dashboard	ANY	ANY	/conversion-rate-by-community--system--dashboard.html	/scrm/dashboard.shtml		HF
78	Active	Core	CRM	Leads by Account (System) Dashboard	ANY	ANY	/leads-by-referral-account--system--dashboard.html	/scrm/dashboard.shtml		HF
79	Active	Core	CRM	Leads by Sales Cycle (System) Dashboard	ANY	ANY	/leads-by-sales-cycle--system--dashboard.html	/scrm/dashboard.shtml		HF
80	Active	Core	CRM	Leads by Source (System) Dashboard	ANY	ANY	/leads-by-source--system--	/scrm/dashboard.shtml		HF
	Active	Core	CRM		ANY	ANY	/lost-denied-leads-by-community--system-	/scrm/dashboard.shtml		HF

Conclusion

The Resource Hub simplifies our users experience when it comes to finding the information they need to learn and realize the value of our products.





Thank you

PENDO MONIUM 2024





Empowering user autonomy

Nick Querci
Nasdaq

PENDOMONIUM 2024

Agenda

- **About Me**
- **Identifying the problem**
- **The solution**
 - How we use the RC
- **Outcomes**
- **Next Steps**

PENDOMONIUM 2024

About Me

- Boston, MA
- Manager of Product Operations @ Nasdaq
- 5.5 years at Nasdaq & ~3 years using Pendo
- Governance Solutions side of the business – Nasdaq Boardvantage is our product



PENDOMONIUM 2024



Our Issue

Users of our portal were not self sufficient, which was leading to increased support requests and decreased user satisfaction



**Inadequate training
documentation**



**Insufficient self-service
features**



**No centralized location for
support resources**



Our Solution

A unified place to host all resources in a single location, which lead to:

- Improvement in user autonomy (which led to less dependency on our support teams)
- Stronger user experience on our platform.



Submit a Feature Request

Suggest product changes and enhancements



Portal Guided Help

Interactive product walkthroughs



Product Updates

Stay informed on the newest product deliverables



Feature Focus Sessions

View previous recordings and register here



Reference Library

Browse PDF's available for download



Nasdaq Boardvantage in a Minute

60 second video tutorials of FAQ



Onboarding

Suggested material to get you started




Support

Contact our 24/7 Support Team



Feature Focus Sessions



Here you can find our client education series, which shares insights and best practices of built-in features already available to you within our platform. Click the link below to access past recordings.

[Feature Focus Sessions On Demand](#)

Upcoming: September 18, 2024 9AM PT | 12PM ET | 5PM GMT

Nasdaq Boardvantage Document Permissions
Join this session to learn best practices on how to manage your document permissions...

[Register Here >](#)

Submit a Feature Request

Submit a request [Open in Portal](#)

What change or improvement would you like to see?

How would this benefit you?

How are you currently performing this task or action? (optional)

Files & Screenshots (optional)

[Upload Image](#)

Max: 10MB, Types: JPG, PNG

Product Area (optional)


None Selected

Product Updates

June 2024

Execute Signatures Seamlessly with DocuSign
By connecting your DocuSign account with Nasdaq Boardvantage, you can consolidate workflows within a single unified platform and empower decision making – anytime, anywhere.

Simplify File Management with Google Drive
You can now connect your Google account to Nasdaq Boardvantage to easily add, edit, and manage your Google Drive files directly in your portal.



To discover more, get in touch with your Account Representative today!

Find Video Tutorials Within the Resource Center
You can now access a number of recordings of in-product FAQs with this new feature.

Support

We are available 24/7, every day of the year, and will answer your query live!

AMERS/CANADA

- Toll-Free US: +1 866 330 1743
- Toll: +1 650 330 0857
- Spanish Speaking: +1 857 413 3099

EMEA

- UK: +44 20 3753 2550
- Sweden: +46 8 519 92550
- Finland: +358 9 8171 0390
- Denmark: +45 3515 9080
- South Africa: +27 11 209 0355
- Dubai: 800 0330 5926
- Italy: 800 599 125
- Germany: +49 698 6799687
- Kenya: +254 203 894161

APAC

- Australia: +61 (0)2 8278 4377
- Hong Kong: +852 800 969 148
- Singapore: +65 63475745
- India: +91 80 4673 8257

Email: boardvantage.support@nasdaq.com



BV Demo - Nicholas Querci
Board Portal >

Dashboard Board Portal Dashboard Manage Dashboards Add Cards

Meetings

MATERIALS:

- New Items
- Briefcase
- All Documents

ACTIONS:

- Approvals
- Signatures 1
- Surveys 1
- Task Management

ADMIN TOOLS:

- Admin Configuration
- Reports

OTHER:

- Directory

Calendar

September 2024

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	1	2	3	4	5
6	7	8	9	10	11	12

Meetings

UPCOMING PAST

There are no upcoming meetings available.

[View All Meetings](#)

New Items

- [2022 Annual Review.pdf](#)
Modified: Jul 27, 2022 9:42 AM
By: Test User
File Size: 802 KB
- [Sample Meeting Book.pdf](#)
Modified: Jun 26, 2024 9:22 AM
By: Nicholas Querci
File Size: 0



BY Demo - Nicholas Querci
Board Portal >

Board Portal Dashboard

Manage Dashboards Resource Center

Dashboard

Meetings

MATERIALS

- New Items
- Briefcase
- All Documents

ACTIONS

- Approvals
- Signatures 1
- Surveys 1
- Task Management
- Email 1

ADMIN TOOLS

- Admin Configuration
- Reports

OTHER

- Directory

Calendar

September 2024

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	1	2	3	4	5
6	7	8	9	10	11	12

Meetings

UPCOMING PAST

There are no upcoming meetings available.

[View All Meetings](#)

New Items

- Finance Committee Meeting.pdf
Modified: Jun 26, 2024 9:20 AM
By: Nicholas Querci
File Size: 20 KB
- 2022 Annual Review.pdf
Modified: Jul 27, 2022 9:42 AM
By: Test User
File Size: 602 KB
- Sample Meeting Book.pdf
Modified: Jun 26, 2024 9:22 AM
By: Nicholas Querci
File Size: 0

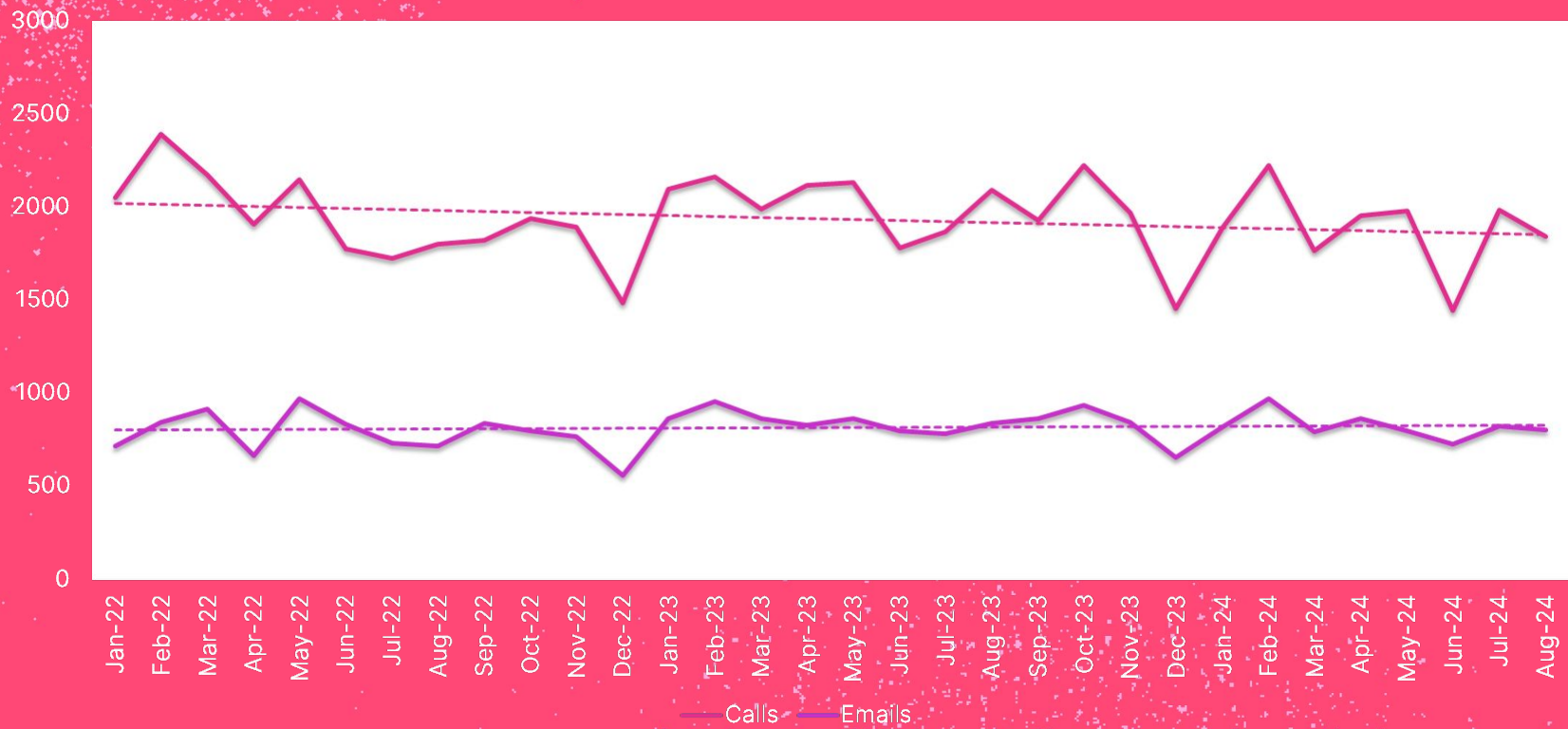


Our Results

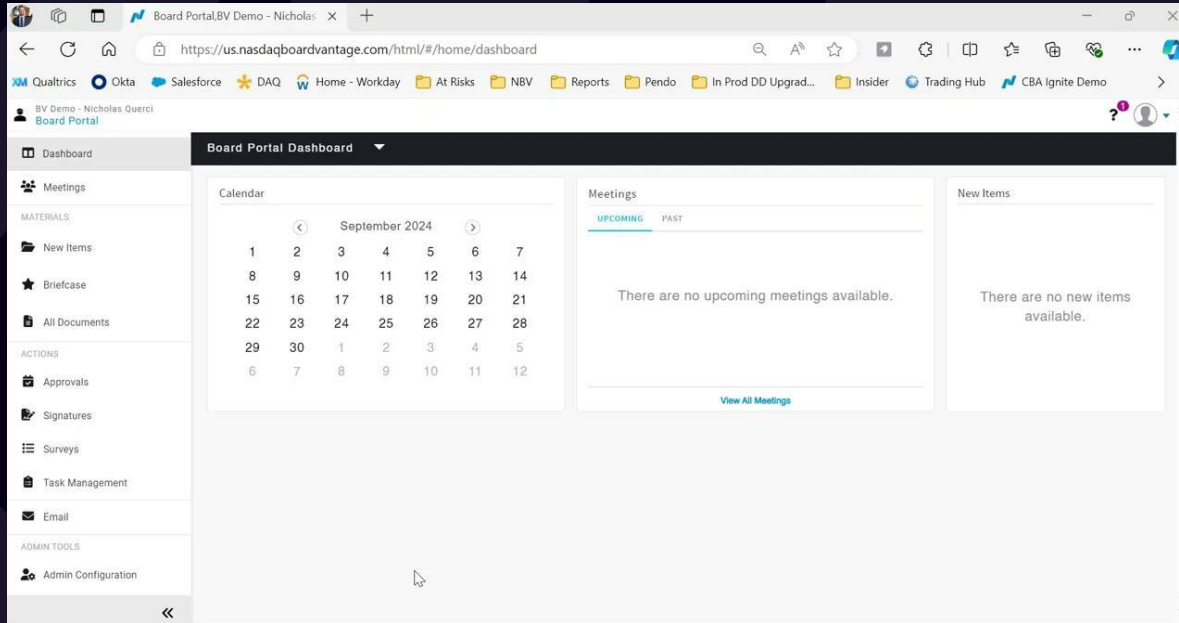
PENDOMONIUM 2024



Decreased Nasdaq Boardvantage Support Volumes



Increased Webinar Registrations



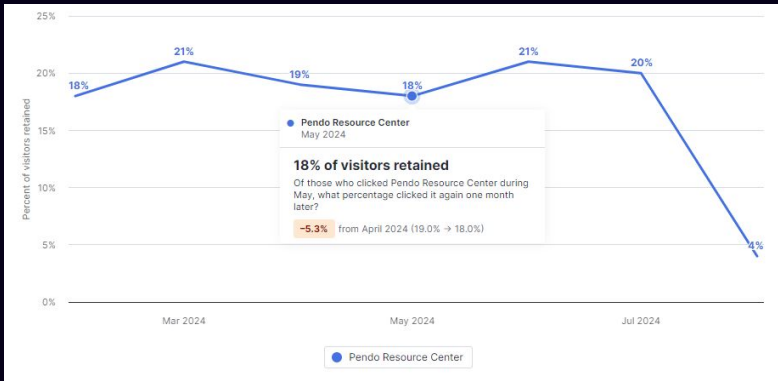
- Avg. of 343 User Registrations in '24



- 23.9% increase in registrations YoY



PENDOMONIUM 2024



90.7K Total Views

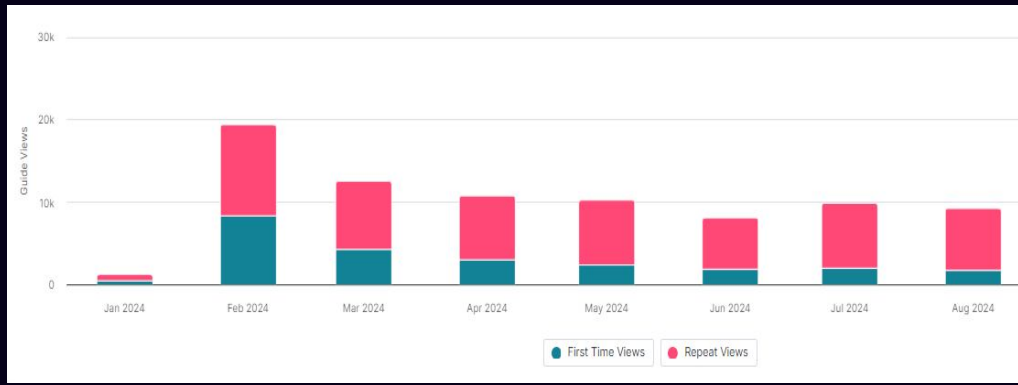


~11k Views per month (avg)



13% monthly retention rate

NEED HELP

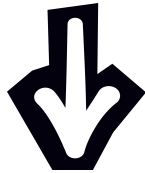


PENDOMONIUM 2024

Harnessing the Power of Pendo



- Greater user self-sufficiency/autonomy
- Increased user engagement
- Higher product adoption







- Increased client satisfaction
- Driving long term value



"I was given the responsibility of creating the last meeting book and didn't realize you had a whole team that provided training. Instead, I used ALL of the guided tours in the RC to complete the entire process. I was SHOCKED."



Next Steps within the RC?

-  **Localization of content through AI**
-  **Support case integration**
-  **Mobile Resources within our app**
-  **Continue to iterate and grow**



PENDOMONIUM 2024

General Communication: This content contains non-sensitive information



Thank you!

PENDOMONIUM 2024