187.0 Release Notes

10 March 2023

Contents

Enhancements

- Ability to control which custom attributes are available to users on dashboards and presentations
- Ability to specify a date as a Business Rule Trigger
- Add icon to easily filter by Roles on the Add Field dialog

Issue Resolutions

- Unable to view scheduled exports on My Account page when a dashboard with a scheduled export section is deleted
- Page-level Filters do not update Custom Chart Sections after first selection is made
- Prevent rules/exports from running on deleted enterprises

Control which Custom Attributes are available to users

Summary

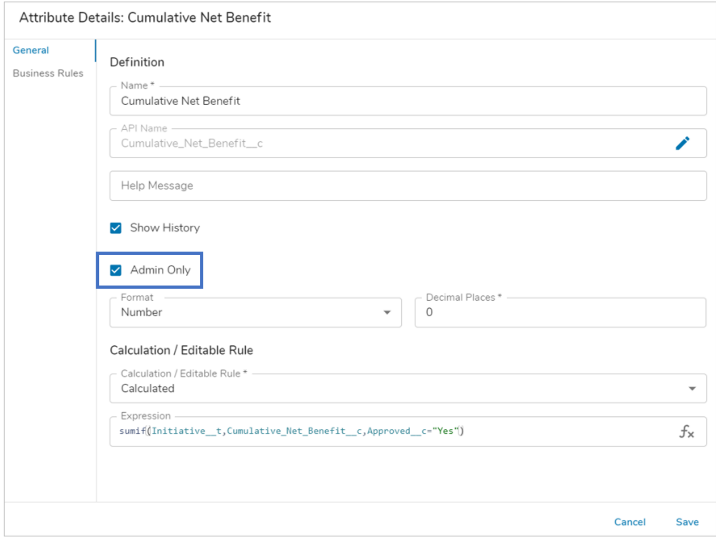
- Previously, when users configured sections on dashboards and presentations, all attributes were visible in the Add Column / Add Field dialogs.
- App Admins wanted to manage which attributes are available for inclusion on the dashboards and presentations, to both simplify the configuration exercise as well as to apply a level of security over sensitive information.
- Now, App Admins can configure Admin-only custom attributes so they do not appear to users when they configure dashboards or presentations.

Applicable to

- Attributes, Dashboards, Presentations

Set up

- On a Template open the Data Panel.
- When creating or editing an attribute, an Admin Only check box is available in the dialog.
- Select this check box. Save. Publish the template.



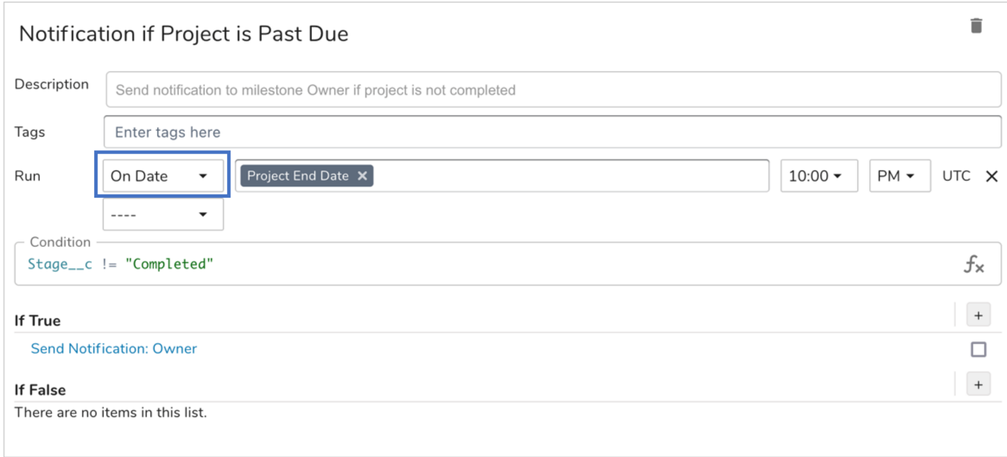
Notes

- 'Admin Only' custom attributes are only visible to App Admins on Add Field / Add Column / section configuration dialogs.
- Out-of-the-box attributes cannot be set to Admin-only.

Specify a Date as a Business Rule Trigger

Summary

- Previously, Business Rules could be triggered on a Weekly, Monthly, or Yearly basis or when certain events occur (i.e., On Edit, On Delete, or On Create).
- Many Business Rules were scheduled to run everyday to check if a specific date had passed. E.g., this approach was commonly applied to check to see if a Milestone was overdue. The daily check is not efficient and adds processing strain to the solutions.
- Now, App Admins can configure Business Rules to run on a specific date.



Applicable to

- Business Rules, Date Attributes

Set up

- On a Template, open the Data Panel and select Business Rules.
- Select a Business Rule to edit, or create a new one via the '+'.

Set up, cont.

- Select the Run dropdown. Choose the 'On Date' option and select one or more Date Attributes to identify when the rule should be triggered. Enter the time the Rule should run on the specified date.
- Add a condition and action(s).
- Save and Publish changes.

Resolved Issues

Release		#	Issue
187.0	*	9327	Unable to view scheduled exports on My Account page when a dashboard with a scheduled export section is deleted
	!	9333	Page-level Filters do not update Custom Chart Sections after first selection is made
	!	9296	Prevent rules/exports from running on deleted enterprises