

188.0 Release Notes

24 March 2023

Contents

Enhancements

- Board Section
- Ability to configure enterprise theme colors
- Wrap text in Table header row
- Ability to right click on a link in a Table section to open it in a new window/tab

Issue Resolutions

- Cannot copy a user's join link in their home enterprise if they were invited to another enterprise first
- Page goes white after opening an attachment or URL attribute from a Table section on Firefox
- Users with edit rights on dashboards cannot configure Lists
- Bar chart displays the same value at different lengths
- Duplicate 'Actual' in Data Set page-level filter when a data set is disabled at the app-level

Board Section

Summary

- Previously, users edited an attribute column in a tabular section or a field on a form to re-assign a pick list value for a work item.
- Users wanted an easy way to manage these pick list values and to better visualize a portfolio of work.
- Now, a Board section provides an overview of work items organized in columns by pick list value and allows users to drag and drop cards into different columns to re-assign the value.

Applicable to

• Layouts, Dashboards, Presentations

<u>Set up</u>

- In Design mode, select Add Section and select the Board category. Choose the type (this can be changed later via the Board Settings).
- In Configure mode, open the Settings modal for the Board section.
- From the General Tab, optionally change the type and add filter(s).
- On the Columns tab, select a field from the dropdown. Column values will be the values of the selected pick list or checkbox field.

| - Idea | 2 - Plan | 3 - Execute | 4 - Realize | 5 - Complete | | |
|--------------------------------------|--|--|--|----------------------------------|--|--|
| Develop new product Finance 780,000 | Deliver Streamlined Record Syst 🥥 | Complementary New Market Se () | Deploy AP solution | Idea Generation App (| | |
| | Operations 1,260,000 | Sales & Marketing 2,583,000 | Finance 868,200 | Operations 470,00 | | |
| Engage in Vendor Exhibition 🥥 | Deploy AR solution | Expand Team for Growth | Deploy New Finance system O | IT Systems Mgmt Platform Roll | | |
| Sales & Marketing 960,000 | Finance 767,000 | Sales & Marketing 1,835,000 | Finance 1,300,000 | IT 748,00 | | |
| Finance reorganization O | Deploy New Logistics Technology 🥥 | Finance System Consolidation I ① | Deploy new service manageme O | Support Product Beta | | |
| Finance 520,000 | IT 1,091,200 | Finance 474,000 | IT 364,000 | Sales & Marketing 517, | | |
| System Integration Initiative O | IT Cloud Migration Project | Modernize Reporting | Setup Shared Services Center | Transformation of Finance Dept (| | |
| IT 1,300,000 | IT 1,744,400 | Sales & Marketing 645,400 | Operations 1,800,000 | Finance 1,100,00 | | |
| | Offshore resources 3 Operations 180,000 | Security Training Review O Operations 120,000 | Shutdown internal datacenter 🥝 IT 1,656,000 | | | |

Set up, cont.

- Optionally define whether each column is displayed and edit the labels.
- At the bottom of the tab, define the sorting method for the columns.
- From the Cards Tab, define the Value, Caption, Icon and Left/Right Sub-captions that will display for each card on the Board Section.
- Optionally enable Preview Pane for each card.
- Save.

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Enterprise Colors

Summary

- Previously, Enterprise Admins could configure the sidebar and chart colors for their Enterprise.
- Admins expressed the need for additional branding opportunities throughout their solution.
- Now, Enterprise Admins can configure multiple elements of their solution with custom branding colors.

Applicable to

• Enterprise Admin, Branding

<u>Set up</u>

- As an Enterprise Admin, navigate to the Branding Tab.
- Under the new Theme section, define multiple color elements for your solution. Use a hex-code or the painter's palette modal to select a color for the given element.
- To return to the default color setting for an element, clear out the hex-code. You will see the color square return to the default.
- Select Save for any changes to be applied.

| | | | | lesources Scenarios Funding | | | | Open RA |
|------------------|---------|---|------------|---|--|----------|-------------|----------|
| RAID Matrix | ¢ | | | | Aggregated RAID Items | | | |
| | | Probability | | | Workstream > Initiative > Name 3 ↑ | | Probability | Impact |
| | Impact | Low | Med | High | Finance | | | |
| | Low | 0 | | 0 | Deploy AR solution | | | |
| | Med | 1 | | 1 | Resource challenges | 0 | <i>→</i> | <i>→</i> |
| | High | 1 | 5 | 1 | Finance System Consolidation Initiative | 0 | 7 | - |
| | | | | | Covid risk | ~ | <i>→</i> | 1 |
| Chart | | | | | Lack of resources causing delays | 0 | ÷ | |
| 4 | | | | 1.2 1.2 8 | Priorities not fully agreed on | õ | ÷ | Ý |
| 2 | | | | 0.6 0.6 4 | Scope increasing due to newly discovered requireme | 0 | 1 | ÷ |
| 0 | Finance | π | Operations | Sales & Marketing | Optimise AP system in UK | | | |
| | | Assumptions Decisions | | saits a manifold | High System Costs | 0 | ^ | ↑ |
| | | | | | Reduce vendors | | | |
| Create RAID Item | | RAID Log Details | | Scope Creep | 0 | ^ | ÷ | |
| Create NAID Nem | | | | System Consolidation Initiative | | | | |
| | | The RAID log provides an overview or RAID items entered in the program. | | | Can acquire required resources | 7 | ^ | 4 |

<u>Notes</u>

- Each Theme color option will affect a different aspect of the solution:
 - Branding: Color of the Sidebar
 - Primary: Color of Primary UI elements (anything clickable)
 - Secondary: Color of the Page-Level Filter Bar
 - Info: Color of any info elements (help text, instructions)
 - Success/Warning/Error: Color for each element, respectively, including metric conditional formatting

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Resolved Issues

| Release | | # | Issue |
|---------|---|------|--|
| 188.0 | * | 9210 | Cannot copy user registration link in their home enterprise if they were invited to another enterprise first |
| | ! | 9379 | Bar chart displays the same value at different lengths |
| | ŀ | 9290 | Users with edit rights on dashboards cannot configure Lists |
| | ŀ | 9242 | Page goes white after opening an attachment or URL attribute from a Table section on Firefox |
| | _ | 9369 | Duplicate 'Actual' in Data Set page-level filter when a data set is disabled at the app-level |