

190.1 & 191.0 Release Notes

6 May 2023

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191.0 Enhancements

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- Conditional Formatting for Metrics in Table Sections
- Ability to display Associated work items as the Cards in a Board Section
- Ability to reorder Board columns
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- Add dismiss option to Alert Messages
- Additional Icons available for Icon/Name/Value Pick Lists & Card Section
- Region selection is remembered on the Mobile App

190.1 Issue Resolutions

- Create Form fails when Pick List values are empty

191.0 Issue Resolutions

- Metric conditional formatting for negative values shows Error color when it should show Warning color
- On Lists and Views, Admins can no longer set the color using a hex code
- Hover text in Donut Chart does not identify what the section represents
- The 'read more' fly out for Form text fields can move to the side of the page

Card Sections

Summary

- Previously, App Admins could register a custom Achievement Card in the App to display a value and achievement progress towards a goal (e.g. Total Savings).
- While effective, the Achievement Card could be complex to configure and it did not easily react to page level filters.
- Now, App Admins can add easy-to-configure Card sections to their layouts and can configure them to respond to page level filtering.

Applicable to

- Layouts

Set up

- In Design mode, add a Card section and select the item type. The value will be derived from the item type (e.g., value: sum of Savings, type: Milestone).
- In Configure mode, click the Setting icon to define the Value and Display settings for the Card. This can include referencing page level filters.
- Save.
- Publish.

The image shows the configuration and display of a Card section. The top part is the 'Card Settings' configuration screen, and the bottom part shows the card's appearance in 'Summary' and 'Value' views.

Card Settings Configuration:

- Data Source:** Types: Milestone
- Value Type:** Record Count (unselected), Attribute Summary (selected)
- Attribute Name:** Total Value
- Summary Type:** Sum
- Decimal Places:** 0
- Filters:** Attribute: Region, Value: {Region__f}
- + Add Filter**

Card Display (Summary View):

- Total Savings:** \$ 2,797,700 (with currency icon)
- # of Risks:** 3 (with warning icon)
- Create Initiative** button
- Milestones Table:**

Name	Key Milestone?	Region	Total Value
Coordinate Move Logistics	<input checked="" type="checkbox"/>	Europe	300,000.00
Inventory Supplier Contracts	<input type="checkbox"/>	NA	50,000.00

Card Display (Value View):

- Total Savings:** \$ 375,000 (with currency icon)
- # of Risks:** 2 (with warning icon)
- Region:** Europe (dropdown menu)
- Milestones Table:**

Name	Key Milestone?	Region	Total Value
Coordinate Move Logistics	<input checked="" type="checkbox"/>	Europe	300,000.00
Environmental Assessment	<input checked="" type="checkbox"/>	Europe	25,000.00
Review existing vendor contracts	<input type="checkbox"/>	Europe	50,000.00
			375,000.00

The dropdown menu for Region shows: Europe (selected), Asia, and NA.

Conditional Formatting for Metrics in Tables

Summary

- Previously, conditional formatting for metrics was only available in Metric Timeframe Lists/Views and for the metric columns included in Work Item Lists/Views.
- As App Admins have started to incorporate the Table section in their solutions, one blocker has been that the metric columns were not displayed with the RYG background formatting.
- Now, Table sections support conditional formatting (of any data set) for metric columns.

Applicable to

- Tables, Metrics

Set up

- On the template data panel, open the Settings for a metric and navigate to the Formatting tab. Enable formatting for a Data Set and configure the comparative data set and threshold value. Note: formatting is available for any enabled Data Sets.
- On a Table section, click the Settings gear to Customize. Select a metric column and choose Configure.

Attribute Details: Total Value

General

Data Sets

Business Rules

Formatting

Actual (actual_d)

Enable

Comparative Data Set
Target (target_d)

when Actual Value is > Target Value

when Actual Value is < Target and within 20% of Target Value

when Actual Value is more than 20% below Target Value

Target (target_d)

Forecast (forecast_d)

Enable

Comparative Data Set
Target (target_d)

when Forecast Value is > Target Value

when Forecast Value is < Target and within 20% of Target Value

when Forecast Value is more than 20% below Target Value

Milestones						
Initiative	Key Milestone?	Planned Start Date	Planned End Date	Total Value - Target	Total Value - Forecast	Total Value - Actual
Facility Consolidation						
Coordinate Move Logis...	<input checked="" type="checkbox"/>	Mar 19, 2022	Apr 2, 2022	80	75	75
Inventory Supplier Con...	<input type="checkbox"/>	Apr 25, 2022	Apr 25, 2022	50	40	35
Environmental Assess...	<input checked="" type="checkbox"/>	Sep 1, 2022	Sep 15, 2022	100	97	100
Sublease retained and ...	<input type="checkbox"/>	Apr 10, 2022	Aug 15, 2022	100	122	125
Terminate Leases No L...	<input type="checkbox"/>	Apr 5, 2022	Apr 5, 2022	85	88	83
Identify Consolidation ...	<input checked="" type="checkbox"/>	May 9, 2022	May 13, 2022	235	240	250
Inventory Facility & Re...	<input checked="" type="checkbox"/>	Jan 20, 2022	Mar 1, 2022	100	98	95
Technology Consolidation						

Set up (continued)

- The Edit Column dialog will appear for the metric. Enable the Display Conditional Formatting option. Save.

Ability to Select Associations as Type for Board Section

Summary

- Previously, Board sections could only display child work items.
- App Admins needed the ability to display associated work items to manage values on items that are not direct descendants.
- E.g., Agile Features have child Stories. Stories from different Features are associated with a Sprint. App Admins would like to see a Kanban Board showing the Stories associated with the Sprint but could previously only show the Stories for a Feature.
- Now, admins can configure a Board section to show associated content.

Applicable to

- Board Sections, Associations

Set up

- On a Layout in Design mode, select Add Section, and choose Board.
- From the list of available template types, select an association.
- Configure the Board and Save.

The screenshot shows the 'Board Settings' dialog box. On the left, there is a sidebar with three tabs: 'General' (selected), 'Columns', and 'Cards'. The main area is divided into two sections. The top section is labeled 'Type' and contains a dropdown menu with the selected value 'Association: Initiative - Program'. The bottom section is labeled 'Filters' and contains a blue '+ Add Filter' button. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save'.

Note: On an existing Board section, you can change the configuration to show an association by selecting the association in the Type drop down on the Board Settings dialog.

Ability to Reorder Board columns

Summary

- Previously, the left-to-right order of Board section columns were derived directly from the Pick List definition.
- To change the order of columns on a Board, App Admins had to re-configure the Pick List. Additionally, with the introduction of the Empty column, App Admins wanted flexibility to define where the Empty column should be displayed on the Board.
- Now, Board columns can be reordered.

Applicable to

- Boards

Set up

- On a Layout in Configure mode, select the Settings icon to open the Board section's Settings dialog.
- Select the Columns tab.
- Click and drag the columns via the left-side drag indicator.
- Save.

Display	Name	Label
<input checked="" type="checkbox"/>	2 - Plan	2 - Plan
<input checked="" type="checkbox"/>	3 - Favorite	3 - Favorite
<input checked="" type="checkbox"/>	1 - Idea	1 - Idea
<input checked="" type="checkbox"/>	4 - Realize	4 - Realize
<input checked="" type="checkbox"/>	5 - Complete	5 - Complete
<input type="checkbox"/>	(Empty)	Empty

Notes

- Upon saving the column order on the Board Settings dialog, disabled columns will automatically be re-ordered to appear after enabled columns. This will be visible the next time you view the Columns tab of the Board Settings.

Resolved Issues

Release		#	Issue
190.1	*	9518	Create form fails when Pick Lists are empty
191.0	*	9514	On Lists and Views, Admins can no longer set the color using a hex code
	*	9509	Hover text in Donut Chart does not identify what the section represents
	*	9498	Metric conditional formatting for negative values shows error when it should show warning
	!	9324	The 'read more' fly out for Form text fields can move to the side of the page