196.0 Release Notes

15 July 2023

Contents

Enhancements

- Ability to copy attributes and metrics to another template
- Ability to reference a role from an associated work item in an Assign Role business rule

Issue Resolutions

- Page won't load when Table section timeframe expression is invalid
- Presentation with large Dashboard on a single slide not publishing
- Board not sorting correctly by autoID
- Discussions: "Show all N Replies" doesn't show additional replies
- Page-level filters not available in typeahead in Form field or Card configuration

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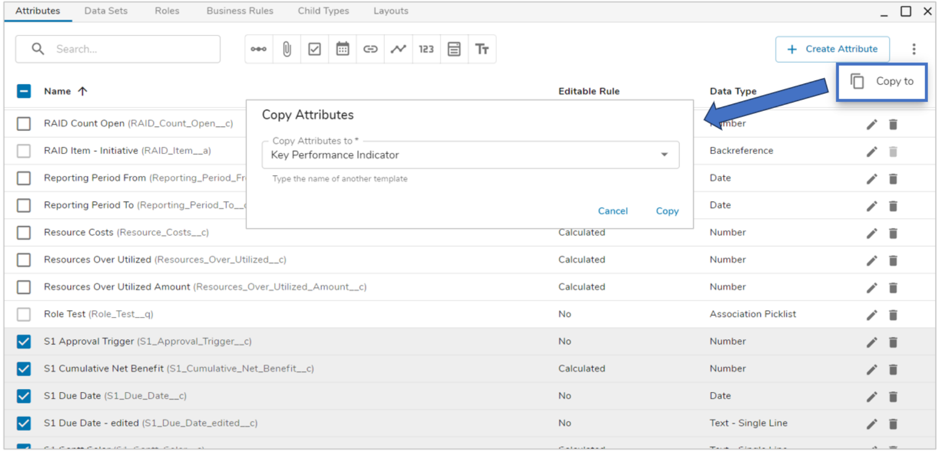
Copy Attributes and Metrics



Summary

- Previously, when a solution required the same attribute to be created on multiple templates (e.g., to represent different project types that share a common set of attributes), the attributes needed to be defined separately on each template. An App Admin could copy a metric from the Metric detail page but couldn't copy attributes.
- When there were a large number of common attributes/metrics, or if there were multiple templates on which to create the attributes/metrics, the exercise of defining them was tedious.
- Now, Attributes and Metrics can easily be copied to other templates via the Data Panel on a template.

Applicable to

- Attributes, Metrics, Templates, Data Panel

Set up

- On a Template, open the Data Panel. On the Attributes tab, find the attribute you would like to copy to another template.
- Select the checkbox to the left of the attribute(s) to be copied.

Set up cont.

- Select the More Actions ellipses at the top right of the Attributes tab and choose the "Copy to" option.
- The Copy Attributes dialog will appear, type the name of another template or select one from the drop down menu. Select "Copy"

Notes:

- Out-of-the-box and Association attributes cannot be copied.

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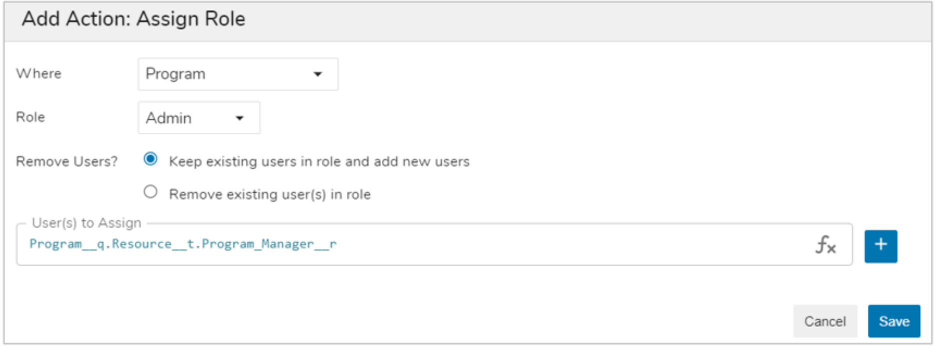
Reference a role from an Association in Assign Role BR

Summary

- Previously when configuring an Assign Role Business Rule, roles from ancestor work items could be referenced in the Users to Assign field.
- App Admins requested the ability to additionally reference roles on associated work items so that they could, e.g., assign an owner to a newly created Initiative using the Owner of the Strategic Objective that the Initiative is supporting (i.e., associated with)
- Now, roles on associated work items can be referenced in an Assign Role action on a Business Rule.



Applicable to

- Roles, Business Rules

Set up

- On a Template, open the Data Panel and navigate to the Business Rules tab. Select the '+' to create a New Rule.
- Define the Trigger and Condition for the Business Rule. Select the 'Assign Role' option from the If True/False action list.

Set up cont.

- Define the location and role that will be assigned, as well as whether to keep or remove existing users in the role.
- Using the typeahead in the 'User(s) to Assign' field, define the reference to an association like the examples below:

  Program__q.Resource__t.Program_Manager__r
  Strategic_Objective__q.owner

- Save and Publish your changes.

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Resolved Issues

Release		#	Issue
196.0	*	9647	Page won't load when Table section timeframe expression is invalid
	*	9604	Board not sorting correctly by autoID
	!	9667	Page-level filters not available in typeahead in Form field or Card configuration
	!	9610	Can't publish when there is a large Dashboard on a Presentation
	!	9431	Discussions: "Show all N Replies" doesn't show additional replies

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