210.1-5 & 211.0 Release Notes

23 March 2024

210.1-5 Contents

Issue Resolutions

- Tables with role columns are failing to load
- Card values clearing out on refresh
- Update Card and Table to be case insensitive for the myRole filter
- AI Support Chatbot refresh not working
- Achievement Cards not showing value or icon on presentations
- Guest users cannot create work items
- SubCaptions spacing and color of text on Card are not matching to custom Achievement Card
- Updates to DueDate through forms do not trigger status updates
- Custom Chart: Issue with Quarterly filter associated with Fiscal Year
- Published Presentation is blurry when displayed on larger screens
- Status Icon is broken for new instances created through Create Forms

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211.0 Contents

Enhancements

- Add Metric fields to Edit Forms
- Display multiple template types in Board sections
- Display role values in Board section cards
- API changes to ensure Guest users cannot access participant information
- Default Section Sizing and Settings for all sections
- Section resizing for Width or Height only
- Hotkeys for Layout edit modes

Issue Resolutions

- When aggregating multiple row types in a Table, two or more percentage columns display as numbers
- Card: Remove leading and trailing whitespace off the value names before saving
- Error icon for Forms is under the input field and cut off
- User session timeout is set to 2am EST for all regions

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App Admin Configuration Enhancements

Summary

- Previously, App Admins configuring dashboards, presentations and layouts on templates had to manually toggle between the different edit modes (Configure, Design and Data Panel) using their designated button. Additionally, when sizing sections there was no ability to separately resize Width and Height.
- We wanted to streamline layout configuration.
- Now, each mode (Configure, Design, and Data) are tied to hotkeys allowing for easy back-and-forth between them. Also, each section now has a separate Width and Height handles.
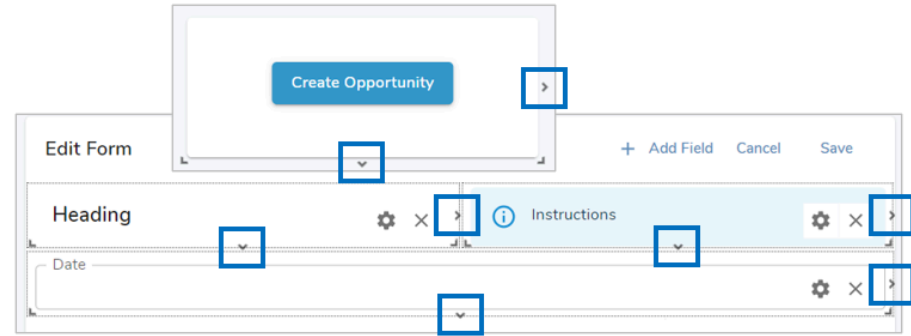
Applicable to

- Templates, Sections, Form Fields

Hotkeys overview

- Toggle Data Panel: "d"
- Enter Design Mode: "e"
- Enter Configure Mode: "w"
- Enter Display Mode (Presentations, Dashboards): "q"

Width and Height handles

- While in Design mode you can now adjust the Width or Height of sections/fields individually.
- The resizing handles are present on all sections and anywhere fields can be configured.

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Board Section Enhancements

Summary

- Previously, we introduced the Board section, a performant, interactive view of work items that provided easy management and visualization of your work.
- Boards were limited to displaying instances of only one template type and role values couldn't be displayed within the Board cards.
- Now, App Admins can configure Boards to show instances from multiple templates or associations. Additionally, Boards now allow Roles to be displayed on Board cards.

Applicable to

- Board section

Set up

- In Configure mode on a Layout, open the Board settings dialog. In the Type dropdown, select one or more template type to display.
- On the Card tab of the settings dialog, in the Title, Caption, or Sub-caption dropdowns, select a Role to display the name(s) of the user(s) holding the role within the card. Save.
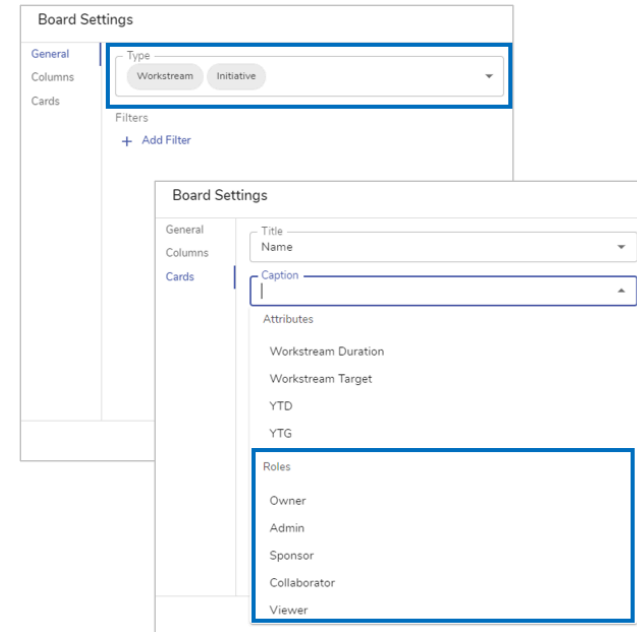
Notes

- When displaying multiple types in a Board, the selected templates must have the same Pick List configured (matching API Names and options) or the section will not display content.

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Ability to add Metrics to Edit Forms

Summary

- Previously, Forms provided users with the ability to add attribute fields consisting of: Associations, Attachments, Checkboxes, Dates, Hyperlinks, Numbers, Pick Lists, Text and Roles.
- App Admins requested the ability to add metrics to Forms so users could enter data from a single time period on a Form.
- Now, Metric values can be added as fields within Edit Forms.

Applicable to

- Edit Form, Table Edit Form

Set up

- On an Edit Form, click on the settings gear and select the 'Customize Layout' option. On a Table with an Edit Form configured, open the Table settings dialog and toggle to the Edit Forms tab.
- Select the '+ Add Field' button and choose 'Attribute' from the dropdown. Choose a Metric - Data Set from the list of attributes. Click Save.

Set up, continued

- Within the metric field on the Form, click on the settings gear to bring up the customize field dialog. Enter an expression to change the Timeframe Date (ex. addMonths(today(), -1) to show data from Last Month for a monthly metric). Select the number of decimal places that should be displayed. Save.

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