212.1 & 213.0 Release Notes

18 May 2024

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213.0 Enhancements

- Attributes & Metrics: Expanded Maximize/Minimize conditional formatting thresholds
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- Charts: Stacked Column & Line metric timeframe chart
- Charts: MMM-YYYY format option available for timeframe X-axis labels
- Charts: Ability to export Charts as images
- Tables: Improved Add Column experience

212.1 Issue Resolutions

- Card not letting you save edits if derived from an associated template
- Metrics not fetched properly via fasttable API after App Upgrade

213.0 Issue Resolutions

- Biweekly Business Rule firing weekly
- Export/Import section: Filter does not work when number attributes are selected
- Date and Number sorting on Board Sections isn't working as expected
- Section Title on Views and Lists disappears after an edit
- Progress Bar doesn't load on instance if one Icon field is empty
- Numeric and Date attributes with data sets enabled no longer display multiple data sets on default forms

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Color Attribute

Summary

- Previously, when Stacked Charts were sliced by Item Name or Association, the colors assigned to the slice was determined by the Enterprise Admin Chart Colors.

- When there were multiple stacked bar/column charts containing different information but sliced by the same Association (e.g., Workstream), filtering content could result in the same item (Workstream) being displayed with different colors in each chart. This variation made it difficult to review the information.

- Now, all work items have an out-of-the-box Color attribute. On Stacked column/bar charts sliced by Item Name or Association, the Color attribute can be used for the slice to ensure consistency across charts.
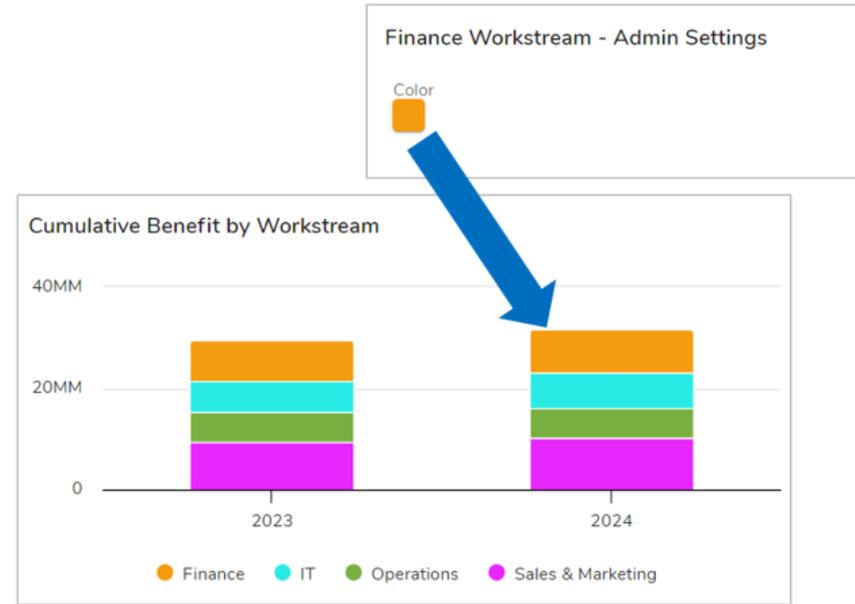
Applicable to

- Charts, Forms, Tables, Data Panel

Set up

- Configure a Stacked Chart section and slice by Item Name or Association. Either of these options will result in the out-of-the-box Color attribute being used for the work item slice.

Notes

- The value of the Color attribute can be changed but cannot be empty.

- Add the out-of-the-box Color Attribute to a Form or a Table and it will display the assigned Color. To edit the color in a Form, click on the palette icon and either enter a hex code or use the color picker.

Ability to display two Colors on Cards

Summary

- Previously, only one Color could be selected for the display of the Value and Icon on a Card.
- Program Admins wanted the ability use color variation on a Card to highlight critical infomation.
- Now, Card sections can be configured using two colors that can be applied to the Icon, Value, and Left / Right Captions.

Applicable to

- Cards

Set up

- In Configure mode on a Layout, open the Settings dialog for the Card section.
- On the Display tab, within the Color section, define the Color and Alternate Color from the available color options(i.e., default black, the Enterprise Administration Theme colors, or the configured App Colors).
- Define the 'Apply To' selection for each of the colors (Icon, Value, Left Caption, Right Caption). Save.

Note

- *You cannot save the Card Settings if a selection is included for both colors. E.g., Icon is included on both Color and Alternate Color.*

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Expanded Maximize/Minimize Thresholds

Summary

- Previously, App Admins could configure Metric/Numeric data sets with Conditional Formatting based on their Target Direction.
- To be "Green" the data set value had to be greater/less than or equal to the Target value. Often Program Admins wanted to define Success if the achievement is within a percentage of the Target.
- Now, App Admins can configure a more granular Success threshold for metric and numeric attribute data sets.

Applicable to

- Metrics, Numeric Attributes, Conditional Formatting

Set up

- On a Template, open the Data panel and open a metric or numeric attribute with Data Sets enabled. Ensure the appropriate Target Direction is set on the General tab.
- On the Formatting tab of the Settings dialog select one of the configured data sets. Enable Conditional Formatting for a Data Set by selecting the checkbox and choose the comparative data set.

Set up cont.

- Define the percentage for the Success color, then the Warning color. The Error color is still dependent on the Warning percentage. Save and Publish.
- Note: existing metrics and data sets for numeric attributes will be set to 0% upon release.

Attribute Details: Cumulative Savings

General
Data Sets
Business Rules
Formatting

Actual (actual__d)

☑ Enable

Comparative Data Set
Target (target__d)

🟩 when Actual Value is ≥ Target Value or within 5 % of 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)

Cancel   Save

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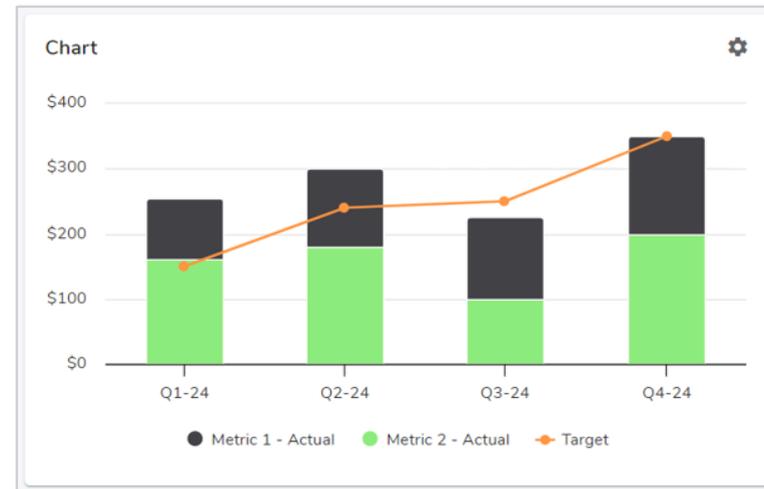# Metric Timeframe Chart: Stacked Column and Line

Summary

- Previously, Metric Timeframe Charts could be configured to display the following Chart Types: Line, Bar, Stacked Column, and Combination Column and Line.
- Clients have requested additional Chart Types to support program analysis and investment decision-making.
- Now, the Combination Stacked Column and Line chart is available.

Applicable to

- Metric Timeframe Charts

Set up

- Open the Chart settings dialog. On the Data tab, configure the X-axis Frequency and Timeframe. Select Custom to use expressions to define the timeframe or select a Date Range page filter.
- Define the Datasource: the template where the metrics are defined and add any desired Filters (these can reference page filters).

Set up cont.

- On the Display tab of the settings dialog, choose the Stacked Column and Line Chart Type. Select which Metrics to display and how to aggregate each for the Column and Line sections.
- On the Column, select the grouping method (Metric Name, Item Name, Associations or Pick Lists). Format the values by applying unique labels and colors to each. Save and Publish.

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Improved UX for Adding Columns to Tables
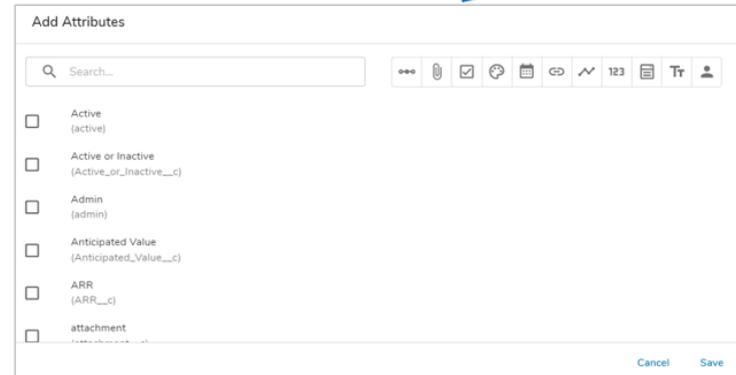
Summary

- Previously, App Admins could add columns to a Table section by using the Add Columns panel on the right side of the section.
- While functional, the Add Columns panel did not provide search or filter capabilities so was difficult to use.
- Now, Tables use the same dialog to add columns as Form sections do for adding fields. It includes searching and filtering for quick and easy location of desired attributes, metrics, or roles.

Applicable to

- Tables

Set up

- On a layout in Configure mode, click on the Settings gear icon in the top right of the Table section. Choose the Customize option.
- Click the + Add Column button next to the Save and Cancel buttons to open the Add Attributes dialog. Add the desired column(s). Save the dialog and the section.

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Target Direction: Maintain

Summary

- Previously, App Admins could configure KPIs (metrics) with the target direction of Maximize (e.g., Revenue) or Minimize (e.g., Expense). Achievement against the target determined the red, amber, green status of the KPI.

- Occasionally, neither of these target directions is appropriate. Instead the ideal for the KPI is to stay within a range of values (e.g., Resource Utilization).

- Now, when configuring metrics or data set-enabled numeric Attributes, App Admins can define the Target Direction as "Maintain" to indicate the value should stay within a range.

Applicable to

- Metrics, Number Attributes, Conditional Formatting

Set up

- On a Template, open the Data panel and open the details for a Metric or Number attribute with Data Sets enabled. On the General Tab, select Maintain as the Target Direction.

Set up cont.

- On the Formatting tab, select one of the configured data sets. Enable Conditional Formatting for a Data Set by selecting the checkbox and choose the comparative data set.

- Define the percentages for the Success and Warning colors.

- Save and Publish.

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