Spider Strategies

What's New in 3.3

Guide to new features in Scoreboard 3.3
Updated June 19th, 2019

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Your success is important to us!

Scoreboard 3.3 includes over 75 large enhancements, most of which were suggested by our customers. Along with this new functionality comes dozens of usability enhancements that make the software easier to use. We've even refined the entire application's appearance with a slightly fresher and more modern feel.

To help you discover everything Scoreboard 3.3 has to offer, we have free training videos on our website, and we've put together new functionality guides like this one. We're also hosting a series of free online webinars to walk you through the new features.

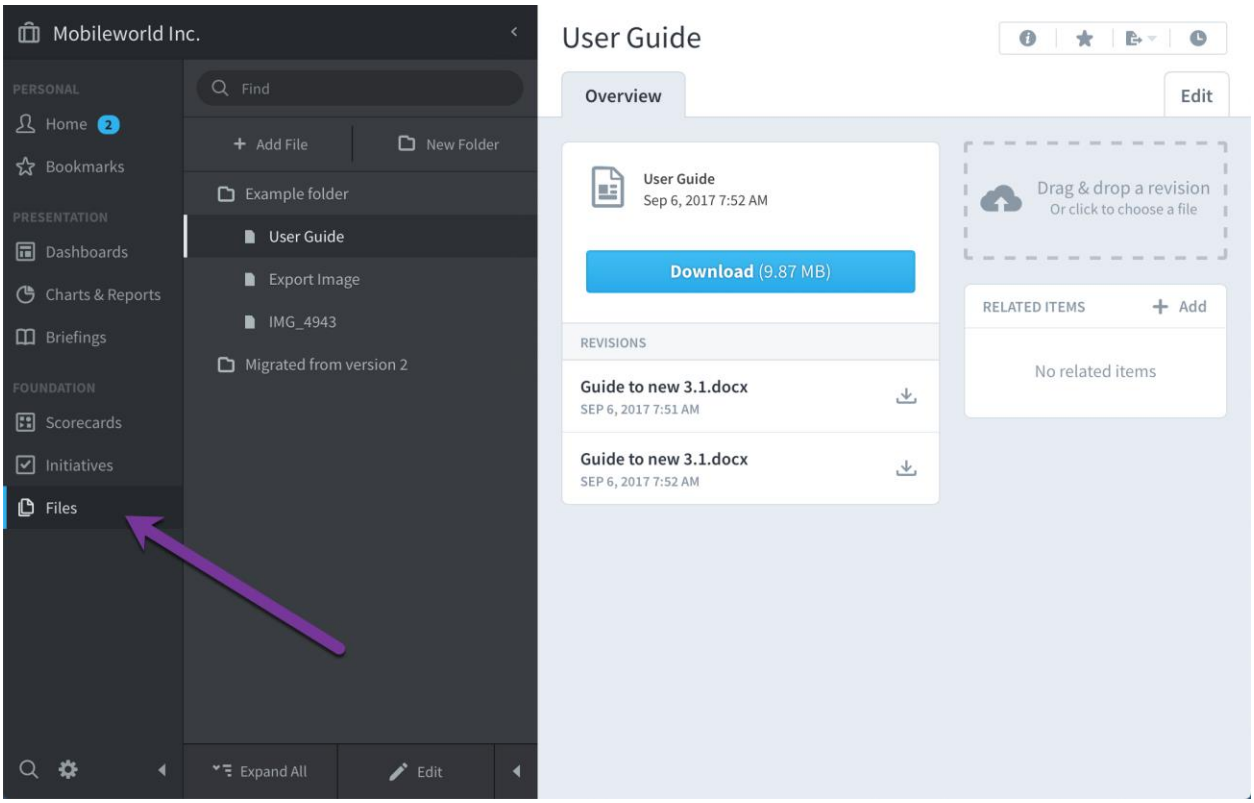
If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. Most of our customers prefer the flexibility of contracting for remote (web-based) assistance, but we also have on-site services available if they're a better match for your requirements.

We have more information about all of our free and paid services at https://www.spiderstrategies.com/services/

Files

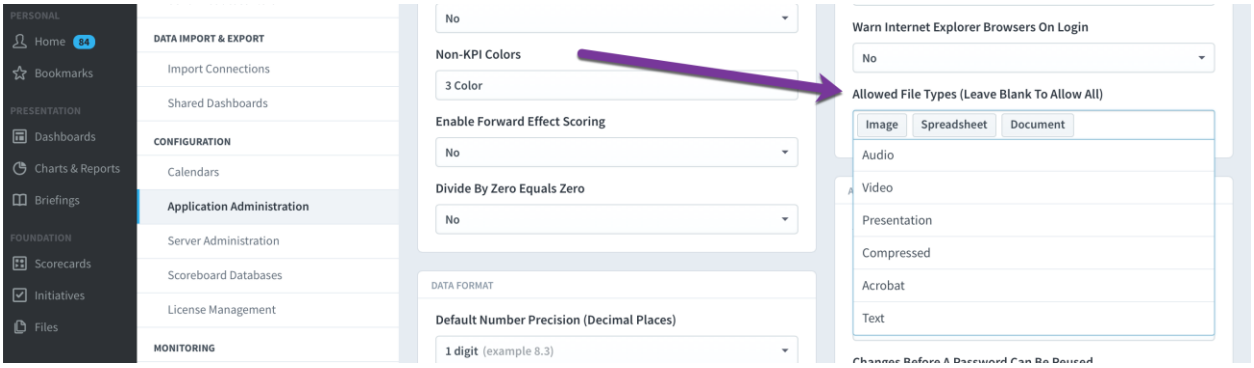
The Documents section is now Files

The section that used to be called “Documents” is now called “Files” because its functionality is expanding far beyond simple document management. In addition to being able to store supporting documents, it is now used to organize shared images for dashboards too.



Restricting file types

Now that the Files section is expanding beyond just document management, there is a new Application Administration setting to manage what kinds of files can be uploaded. Users will still be able to upload any type of file by default.

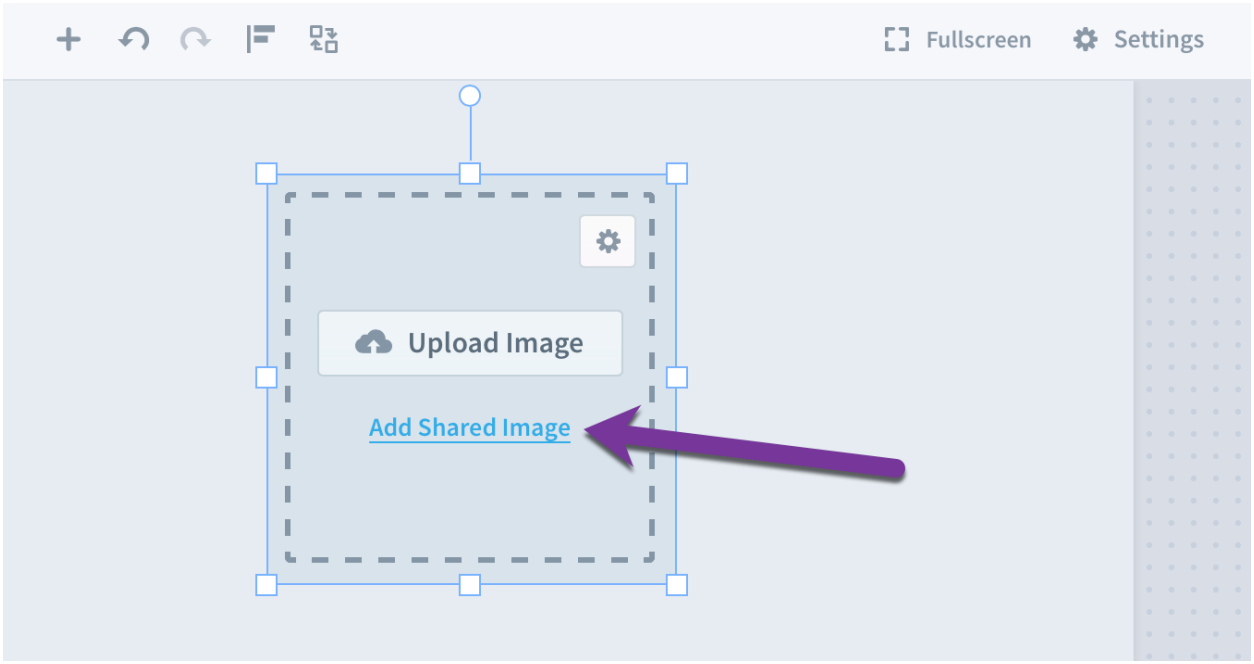


Dashboards: Usability

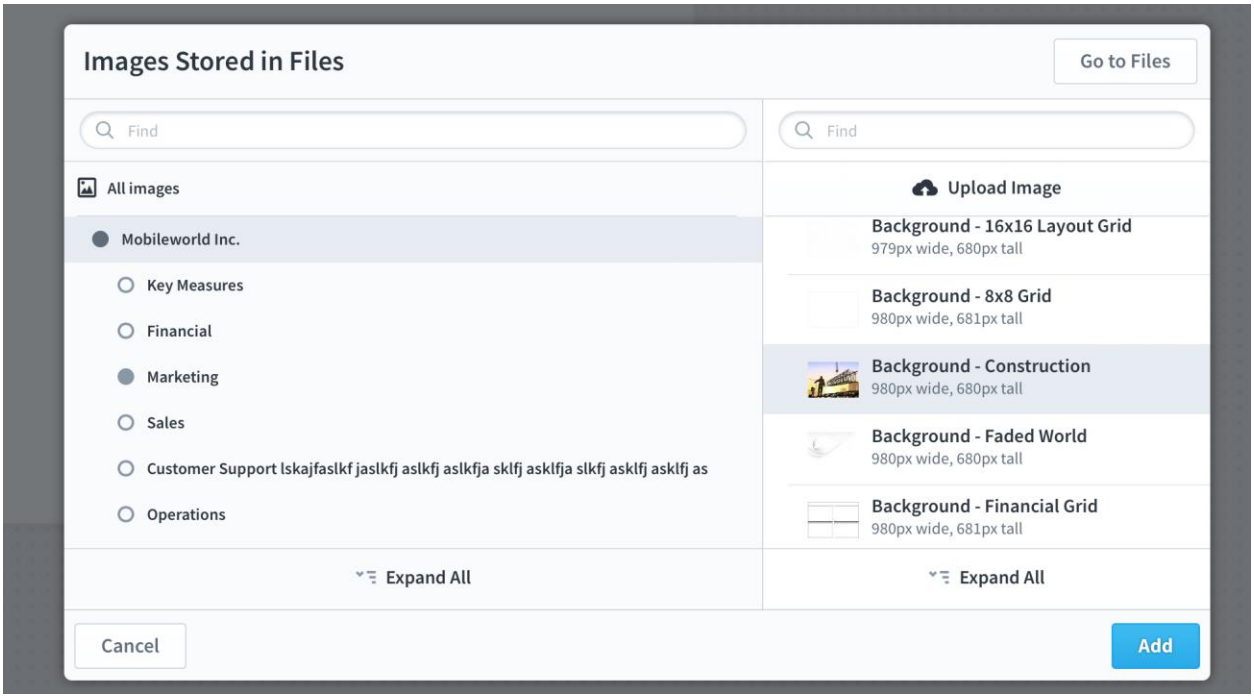
Shared dashboard images

In the past, users could add image widgets to their dashboards by uploading individual images to individual dashboards. Version 3.3 now allows users to manage shared images in the Files section, and then add those images to dashboards.

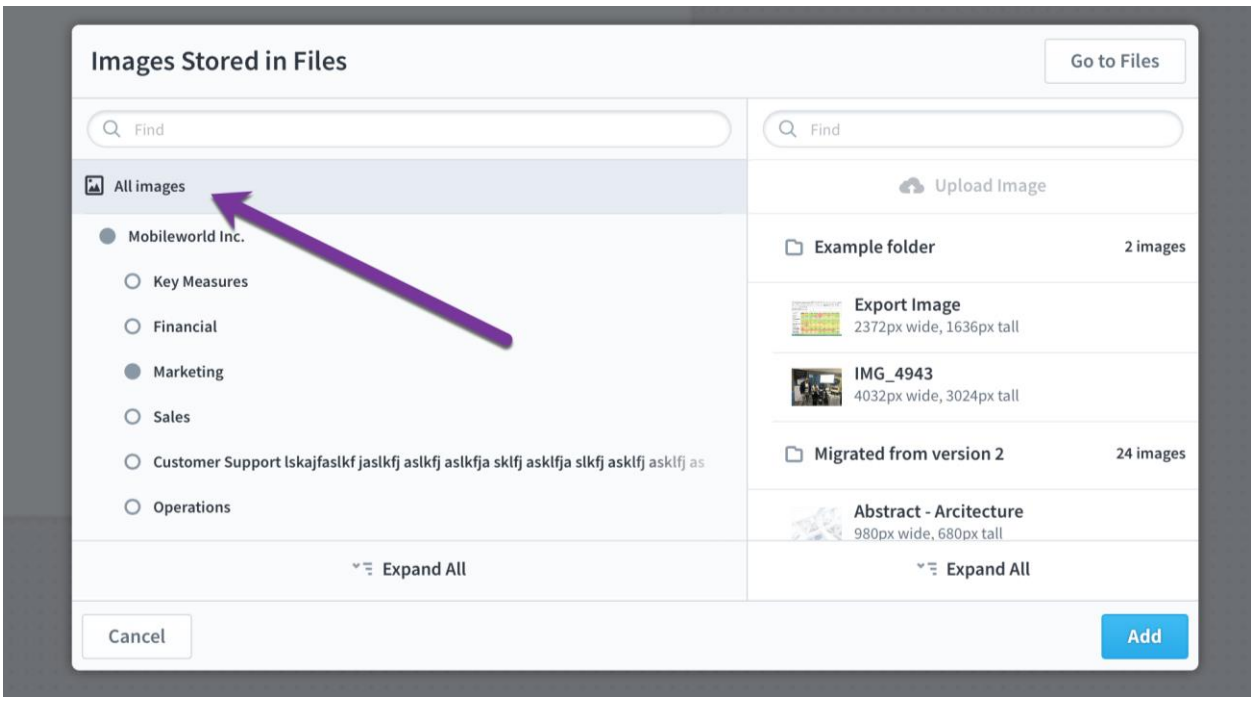
To do this, just click the "Add Shared Image" link on an image widget.



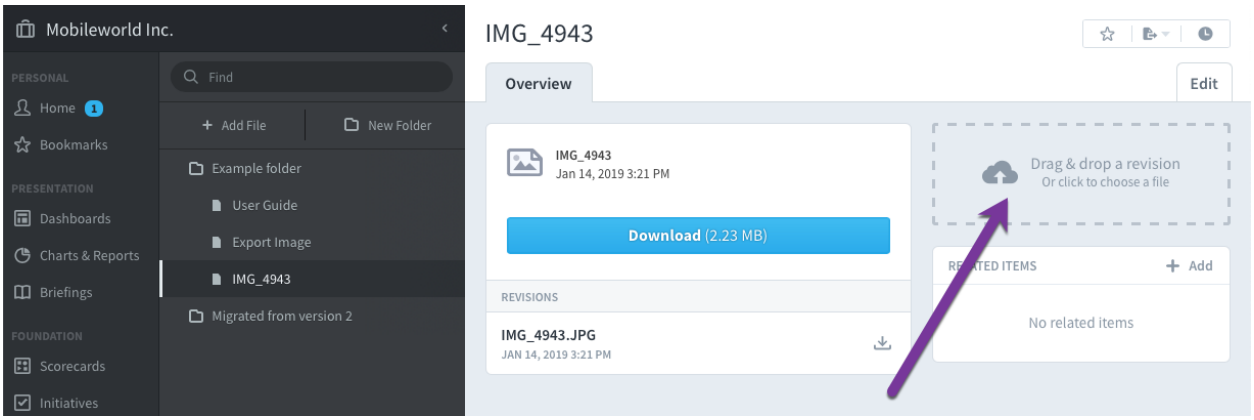
This opens a dialog where you can browse for images stored in the Files section. By default, everything is sorted by organization.



If you don't know which organization your image is in, however, you can select "All Images" at the top of the organization tree. This combines all images from all organizations on the right.



If you ever want to update the shared image later, just upload a new revision in the Files section. All of the dashboards using this shared image will automatically update.

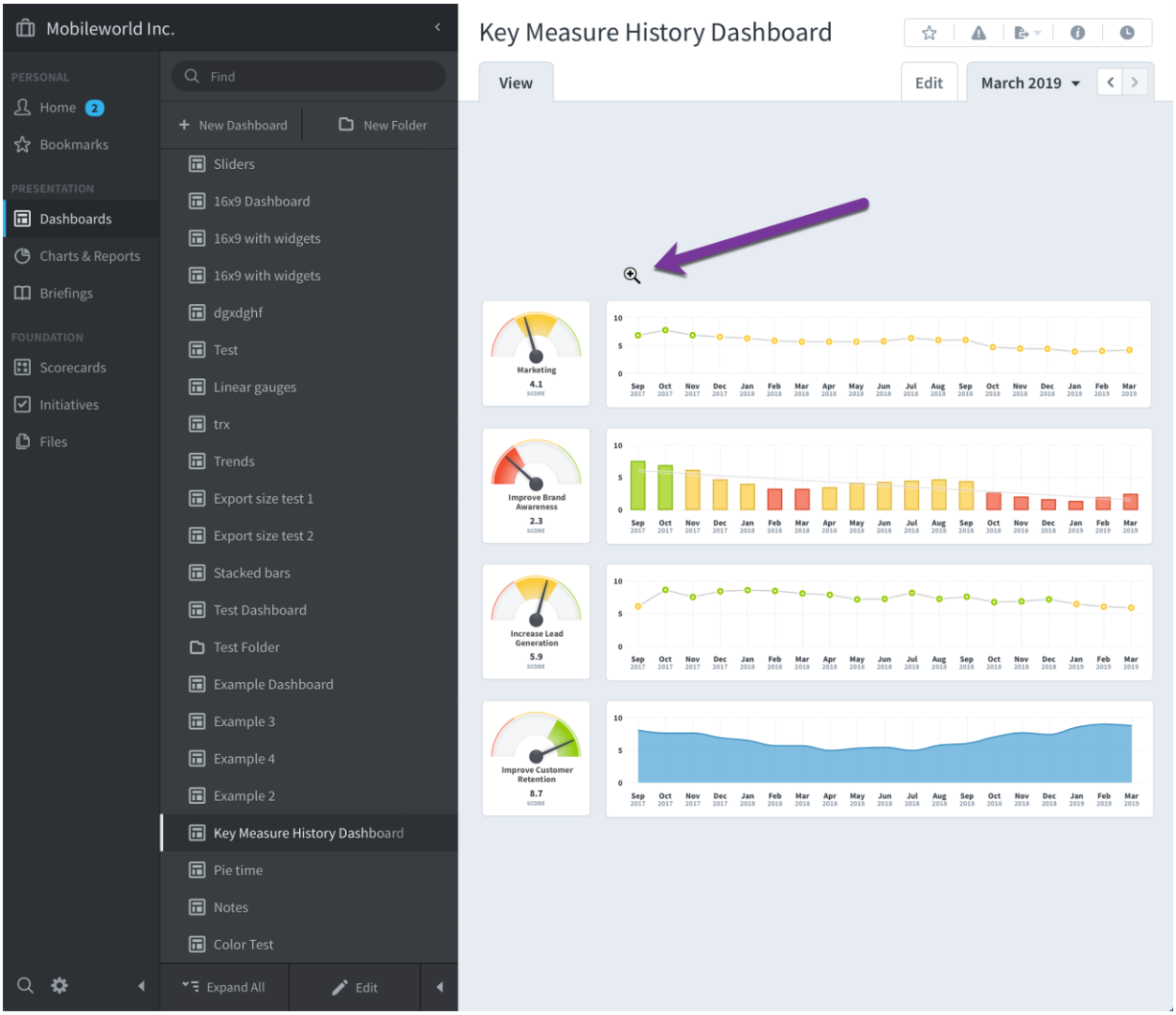


Dashboard zooming

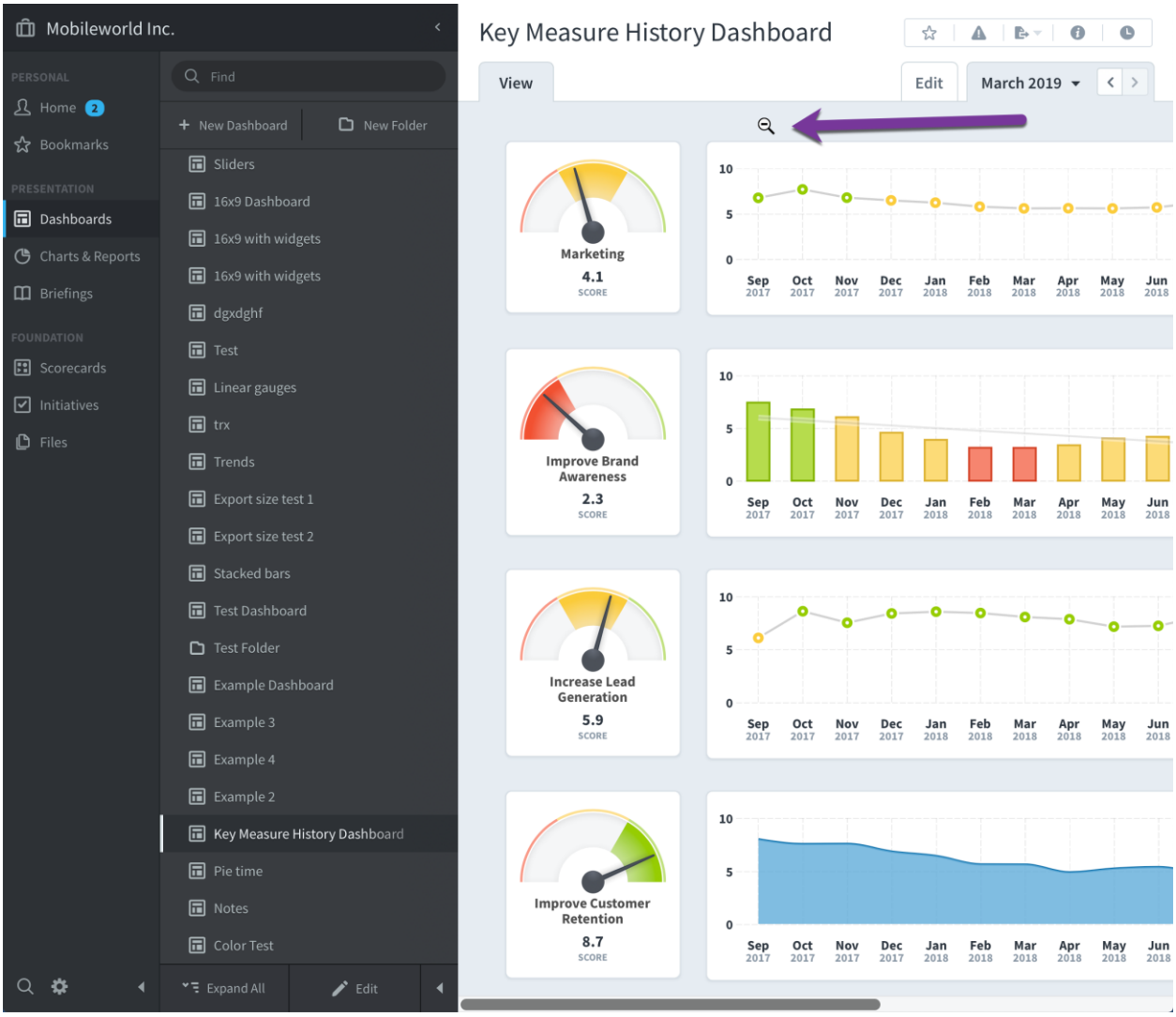
When Scoreboard displays a dashboard, it automatically resizes the dashboard to be the largest size possible while completely fitting on the screen without scrolling. This allows you to view your dashboards on devices ranging in size from mobile phones to boardroom projectors.

Dashboards often don't fit perfectly on the screen that you're using to view them, though. That's because the shape of the display area is always changing based on your device size, the height/width ratio of your browser, or which panes are collapsed on the left.

When this happens, you'll see extra space on either the top/bottom or right/left of your dashboard. In version 3.3, when you hover your mouse cursor over this empty space, it now changes to a zoom-in cursor.



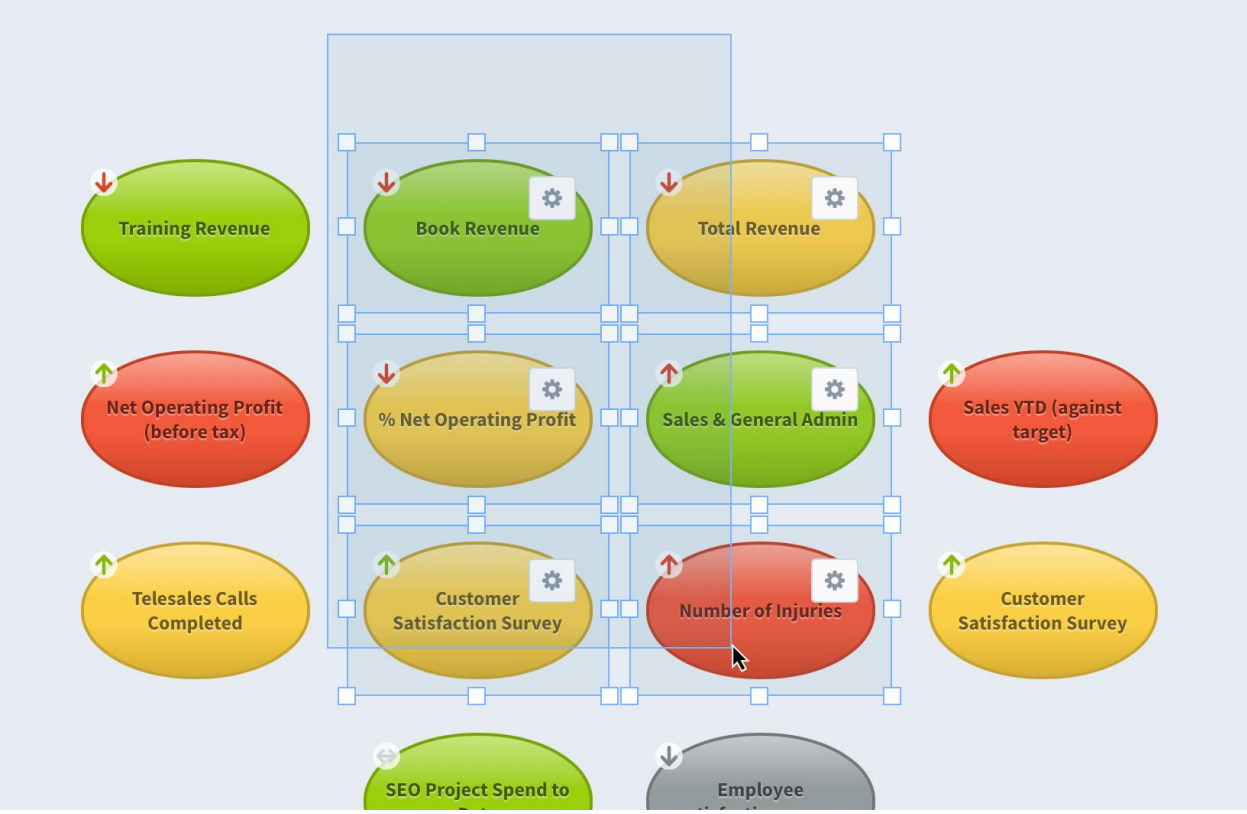
If you click on one of these zoom areas, your dashboard grows, removing all of the blank space and adding scroll bars.



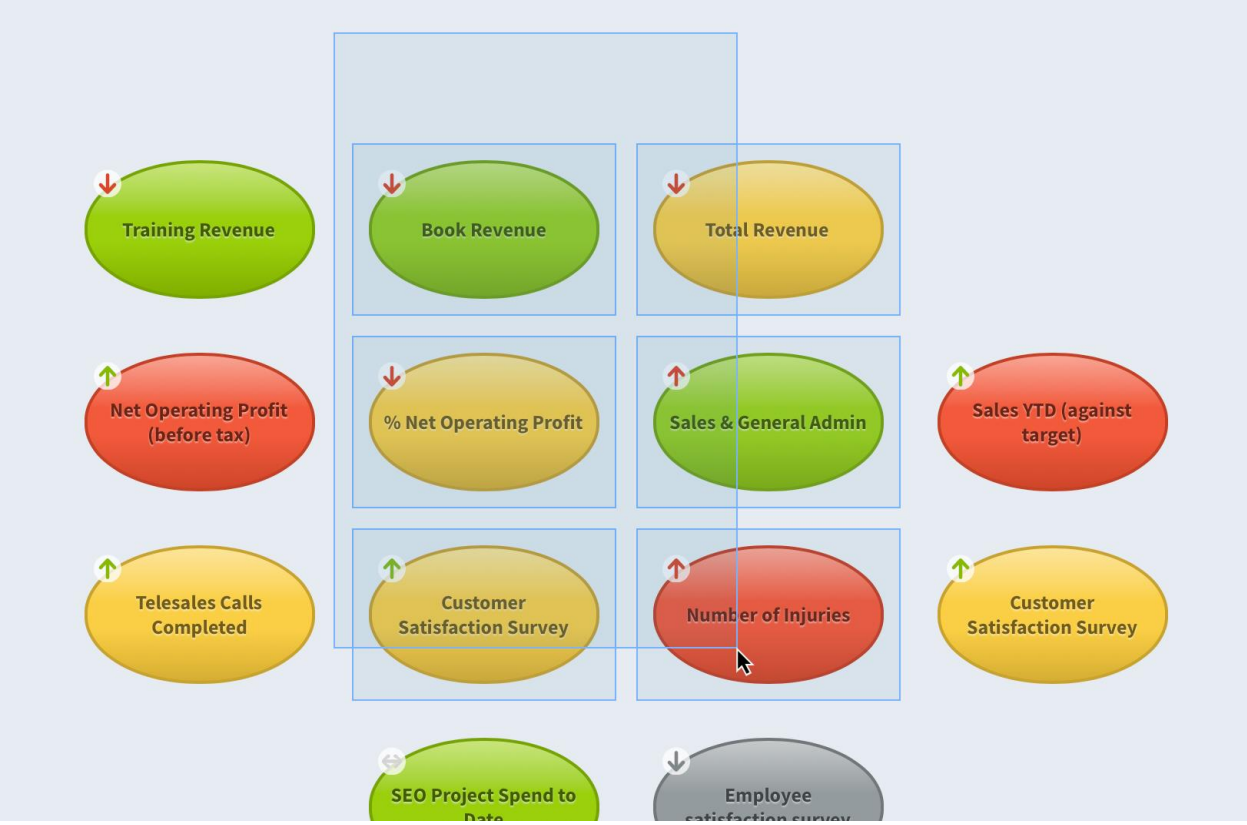
At this point your cursor changes to indicate that clicking again will zoom-out so you can see the whole dashboard again. By displaying dashboards this way, Scoreboard starts by showing the entire dashboard, allowing you to see at a glance what is happening everywhere. Then you can choose to zoom in to see more detail.

Selecting and resizing multiple dashboard widgets

There are two ways to select multiple dashboard widgets in Scoreboard, both of which are similar to applications like PowerPoint. The first way is to start a drag on an empty area of the dashboard and create a selection that touches multiple widgets. This is what this has looked like in the past.

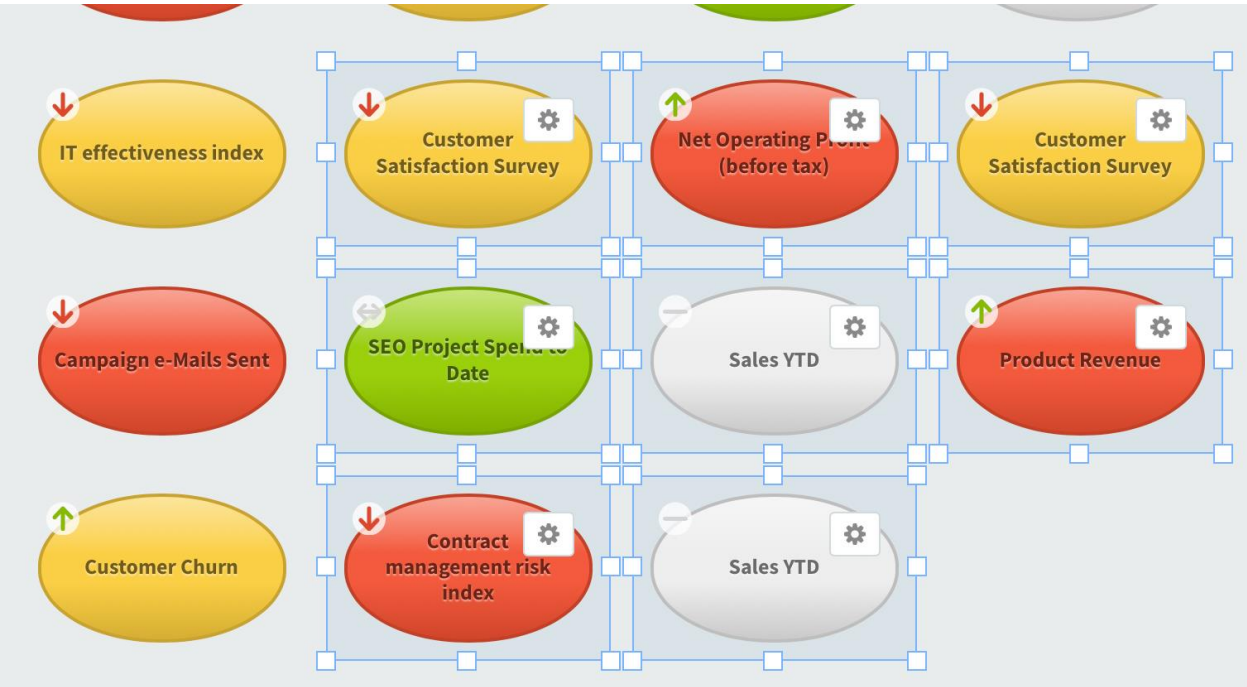


In version 3.3, the appearance is much cleaner.

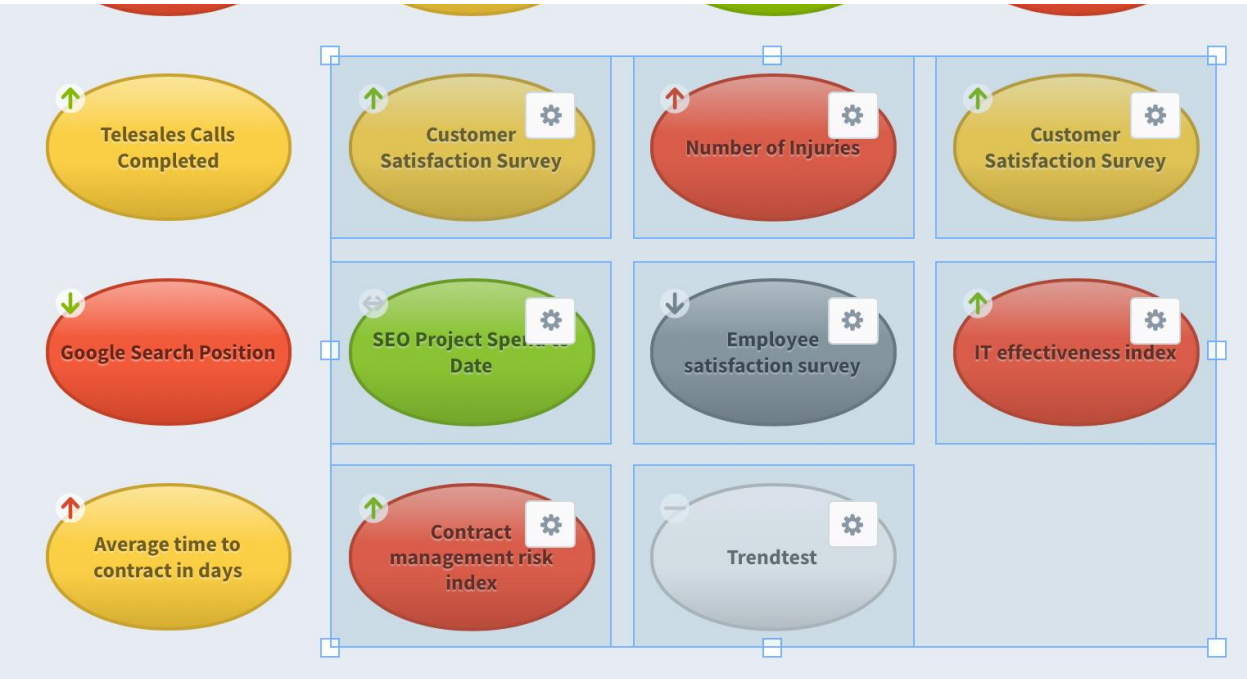


The other way to select multiple widgets is to click on them while holding down the Command, Control, or Shift keys. We support all three keys in version 3.3 to match people's experiences with different operating systems.

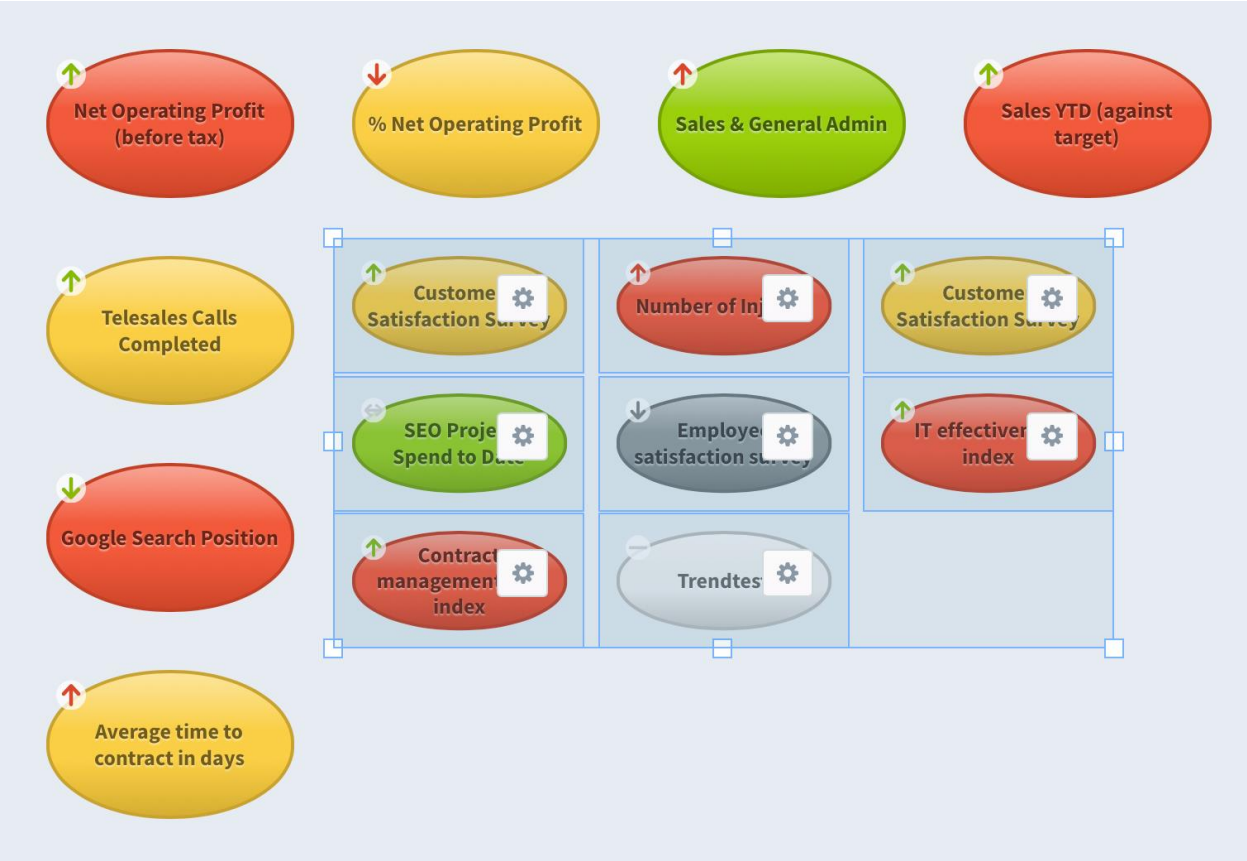
This is what it used to look like when multiple widgets were selected.



In version 3.3 it now looks like this.

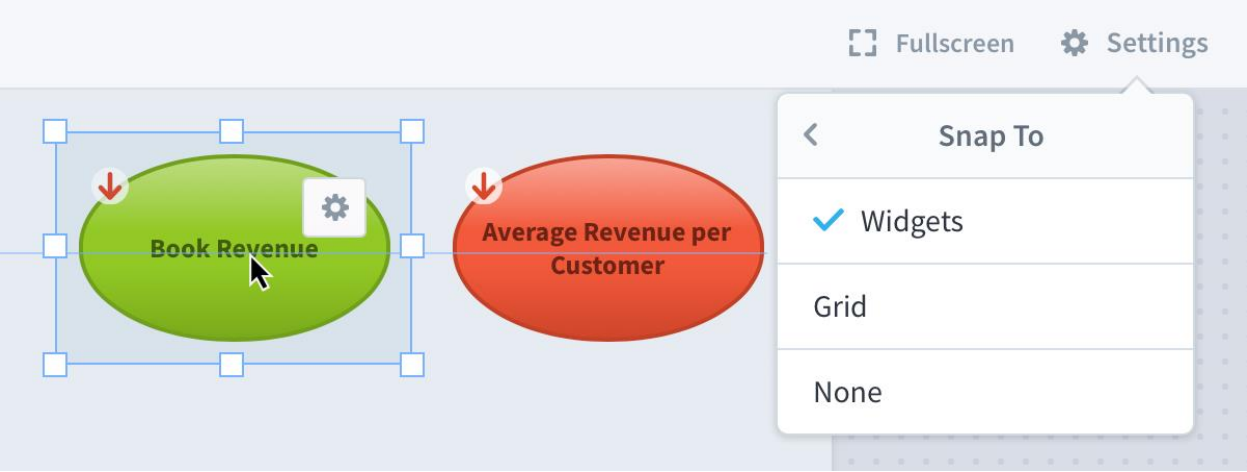


This simplified appearance not only looks cleaner, but it also draws attention to the new ability to resize multiple widgets at the same rate. All of the selected widgets maintain their relative size and spacing as you resize the bounding box.

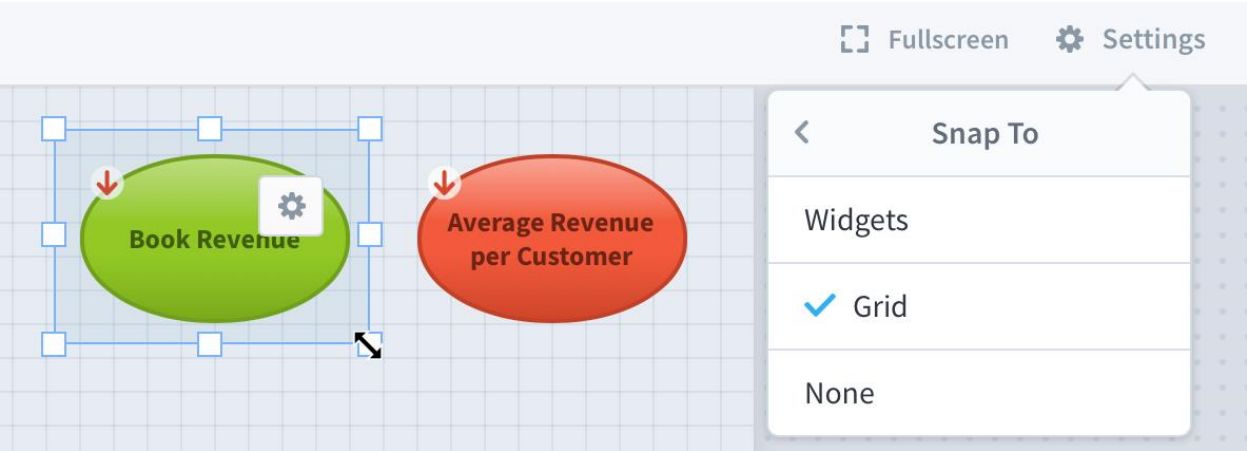


Snap-to alignment options

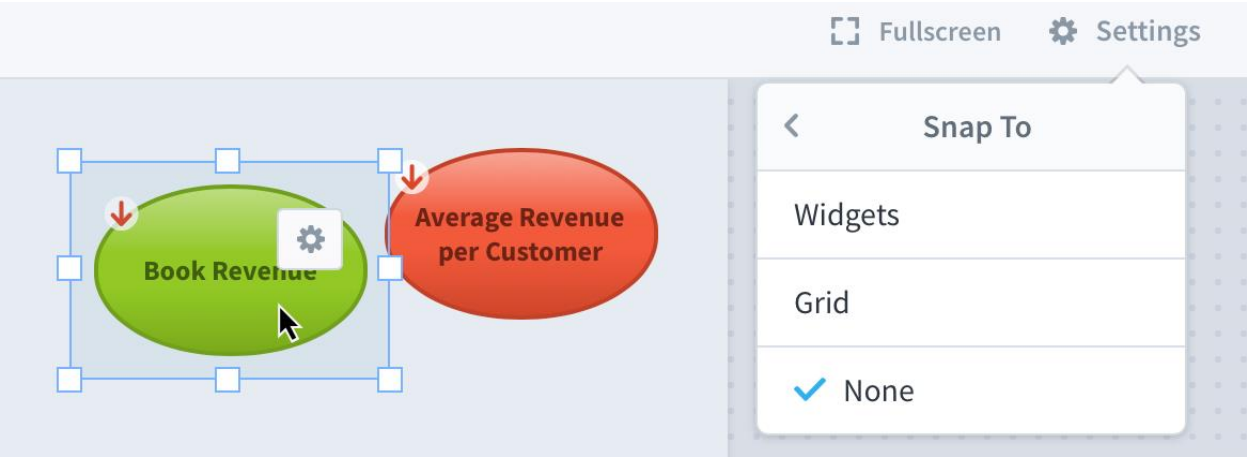
In 3.3 there are now three different snap-to options when editing dashboards. The default option is Snap-to Widgets, which uses the size and position of other widgets on the dashboard as a guide as you're moving or resizing widgets.



Another option is Snap-to Grid, which aligns your widget position and size to a grid that only shows up when you're editing.

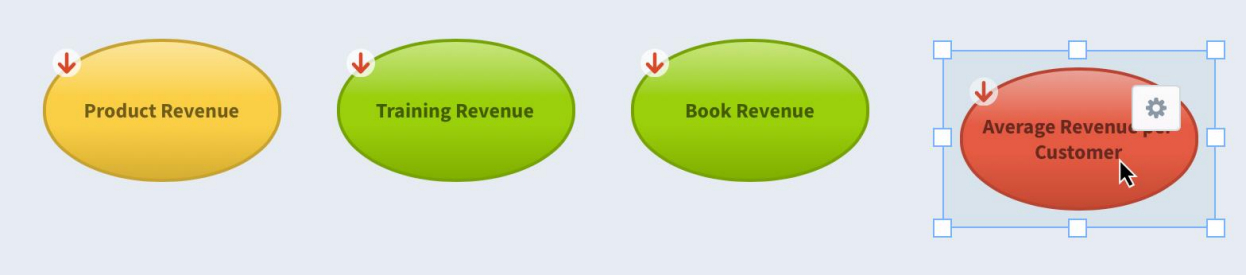


Finally, you can choose Snap-to None, which disables snapping all together. This is useful when fine-tuning layouts or when there are widgets that are irregularly placed.

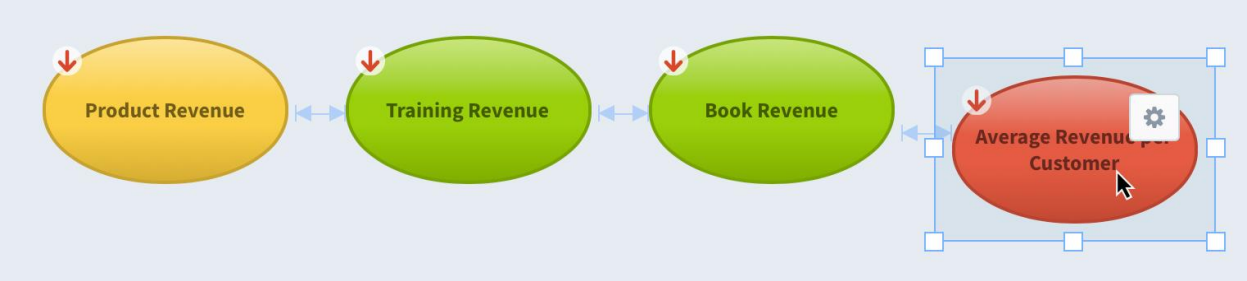


Snap-to widget spacing

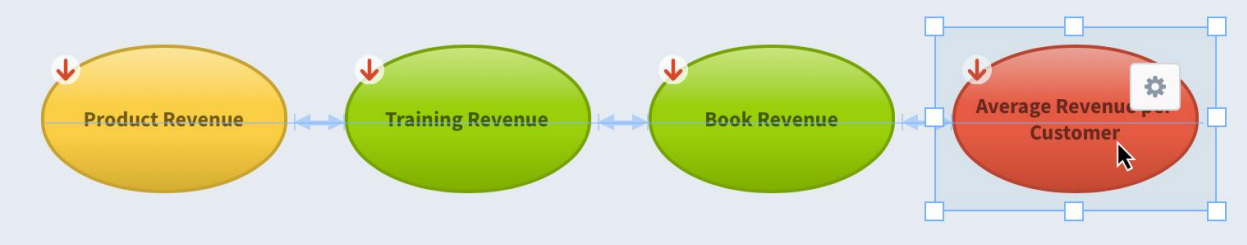
When you're editing your dashboard in Snap-to Widgets mode (the default), Scoreboard now makes it easy to maintain uniform spacing between widgets.



Just drag your widget close to other widgets and it will snap into place.

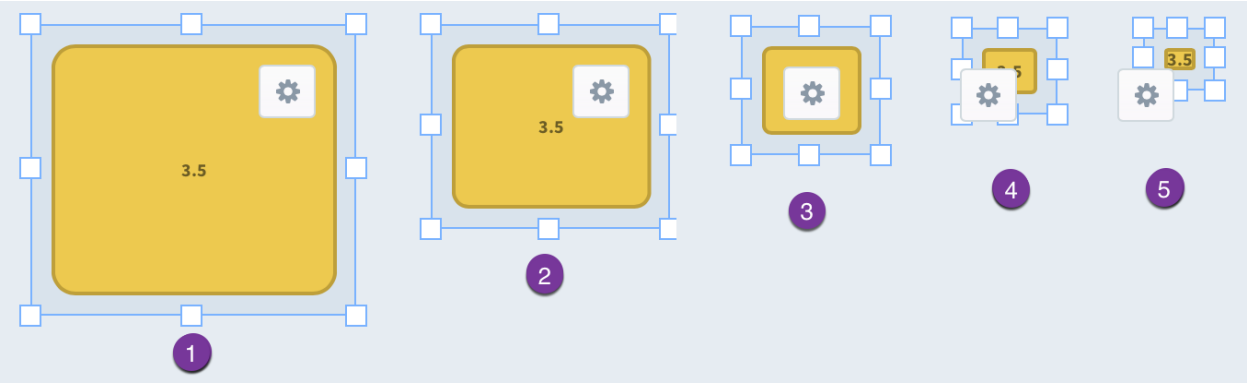


Snap-to spacing and alignment automatically combine for perfect positioning.



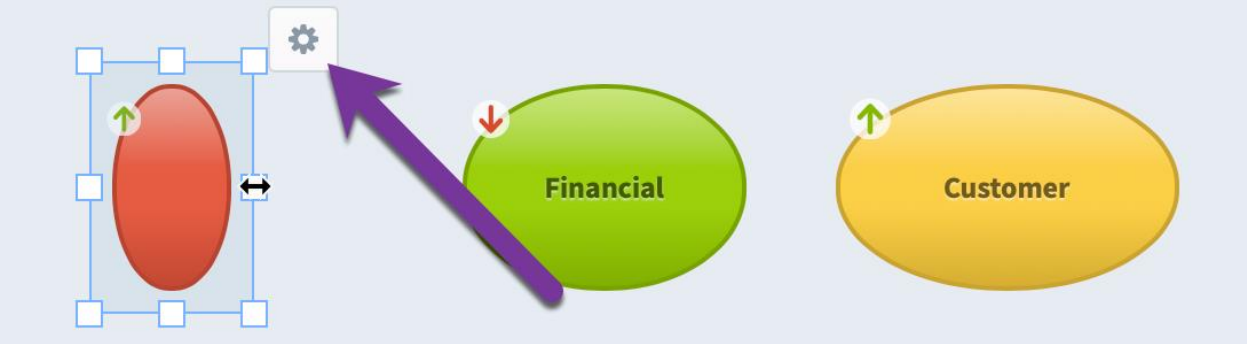
Settings icon never overlaps small widget controls

You configure dashboard widgets by clicking on its gear button. As you can see in figures 1, 2, and 3 below, this works well when widgets are larger. Figures 4 and 5 show how the configuration gear could cover a small widget's resize handles for smaller widgets in previous versions of the software.



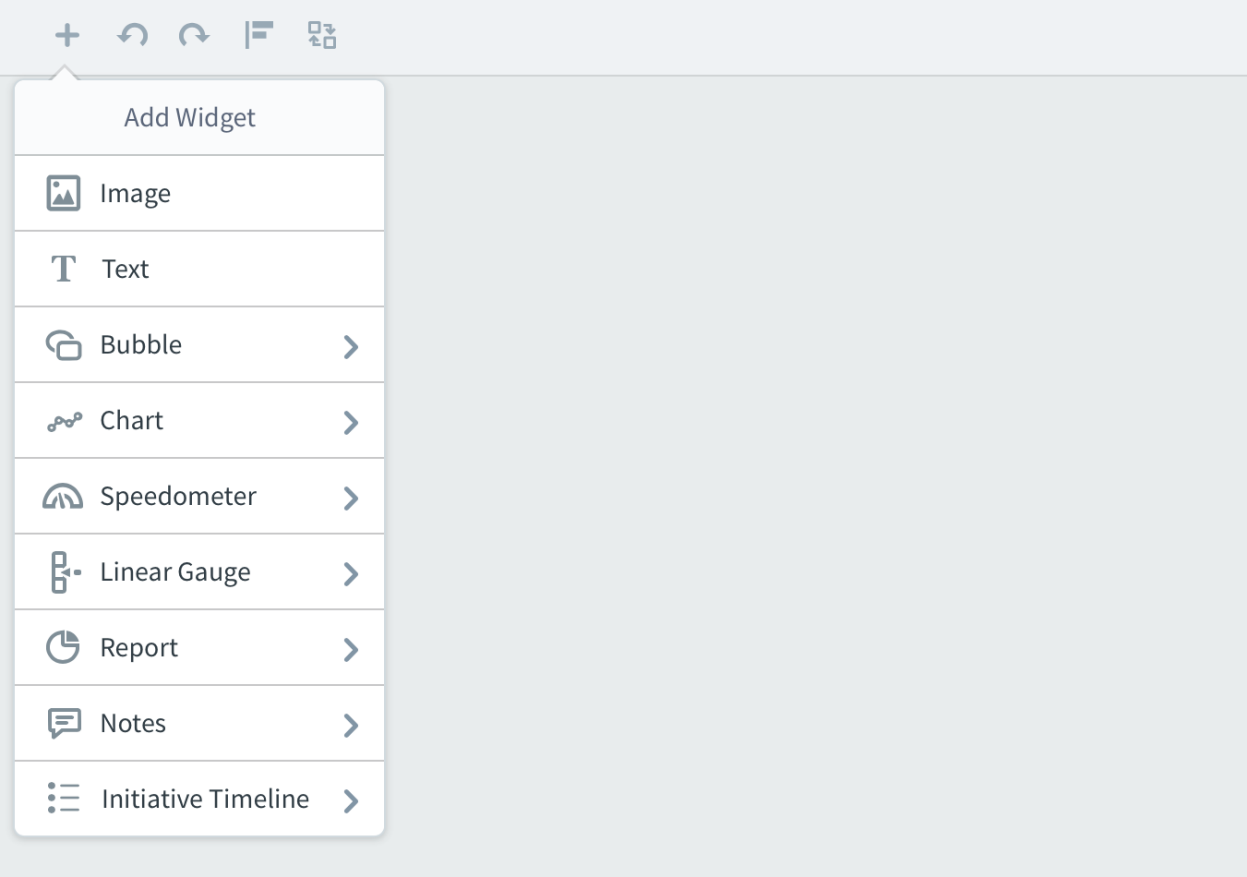
This is no longer a problem in version 3.3. Here you can see a widget's configuration button on top of with widget when it's wider.

As the widget becomes narrower, the configuration button moves outside.

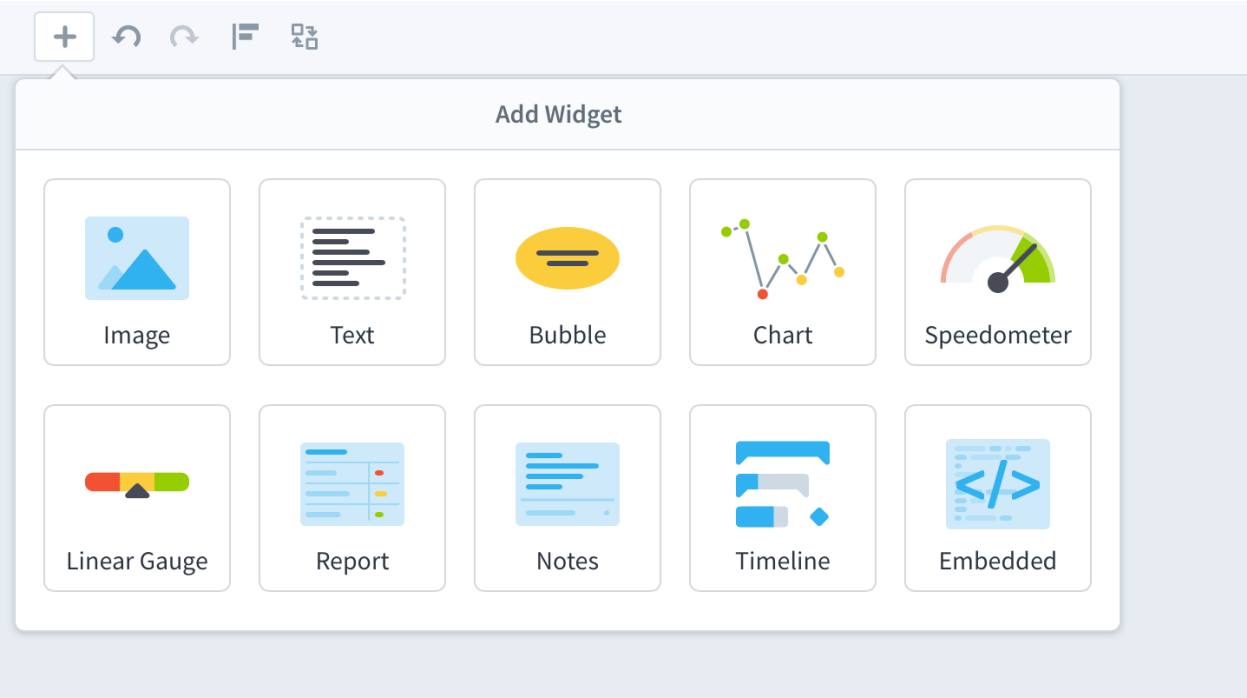


Redesigned "add widget" menu

This is what the "add widget" menu used to look like in the Dashboards section.



In version 3.3 there are now large, colorful icons to better represent each widget.



Automatic removal of extra dashboard space

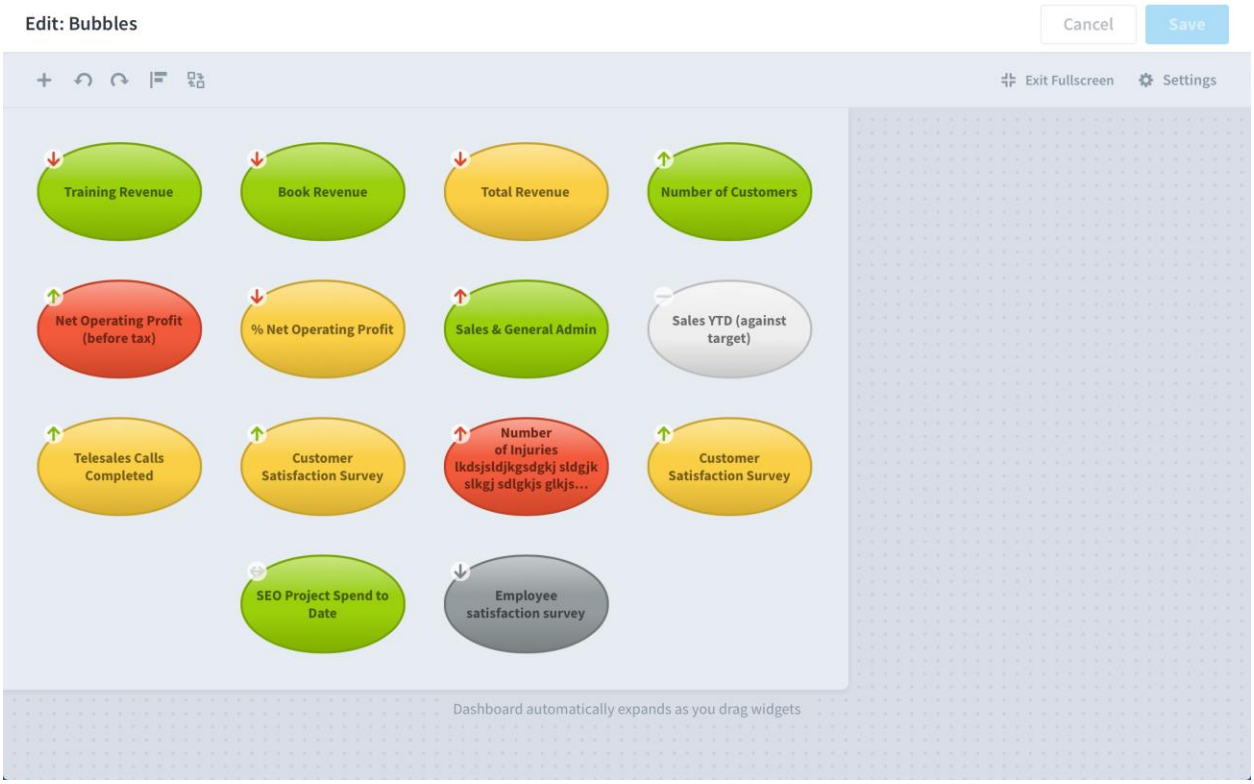
The dashboard canvas automatically grows taller and wider as you drag widgets toward the edges. They also automatically shrink as you drag widgets back in. By acting in this way, we can guarantee that there is never extra room on the right and bottom of dashboards.

That hasn't been the case with the top and left of dashboards, though. If you're not careful, you could have extra space on the top and left sides.

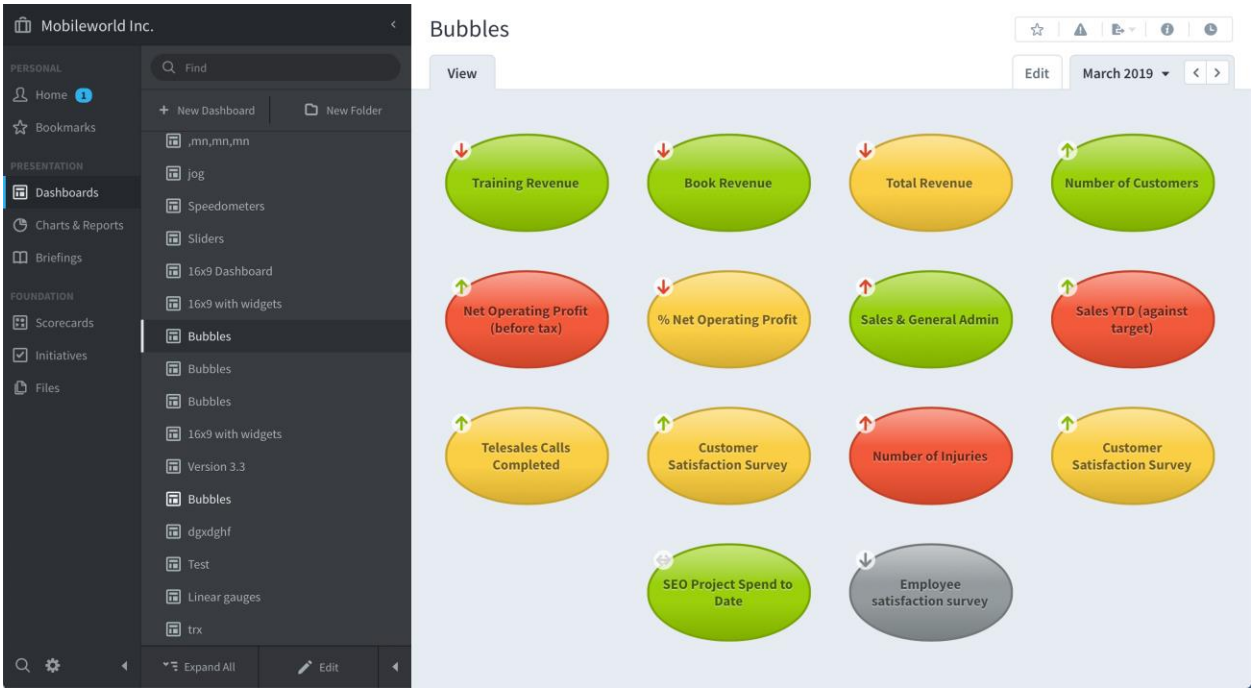
When you view the dashboard, this extra space makes everything feel off-center, and it is a poor use of viewable space.

In version 3.3 this is no longer a problem. You can continue to edit your dashboard as before with extra space on the left and top.

But now when you click save, all of your widgets slide up and to the left, removing any extra space.

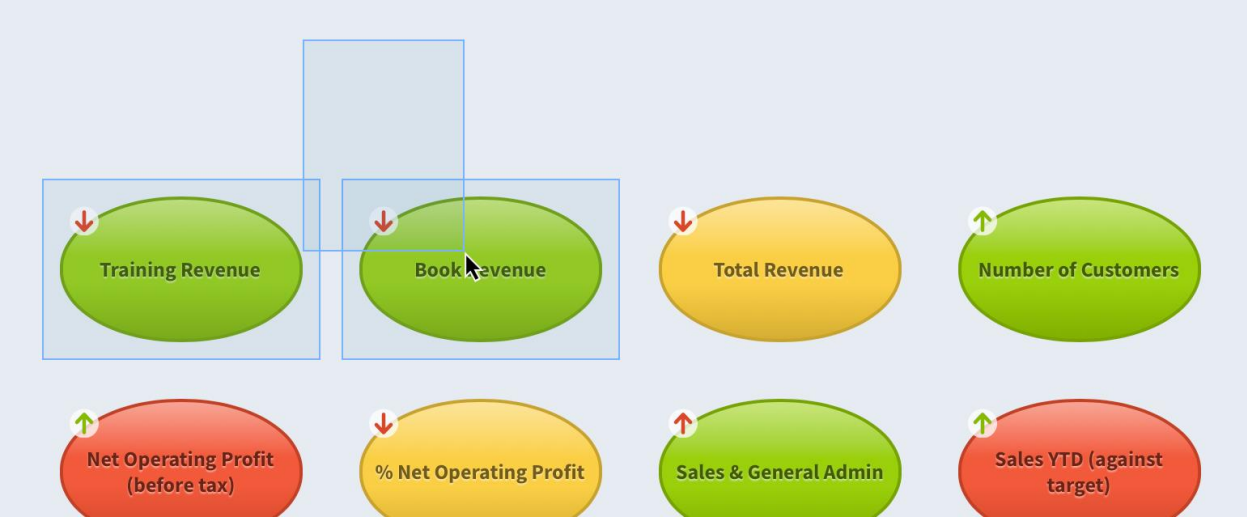


This ensures that your dashboards are centered and displayed at the largest size possible.

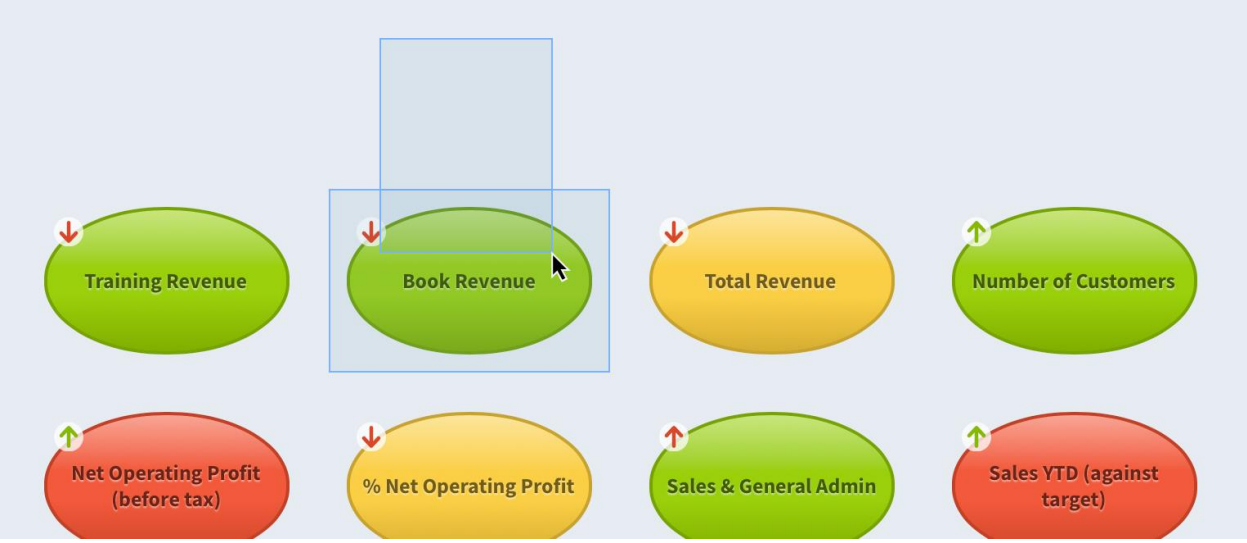


Adjusting dashboard selection using spacebar

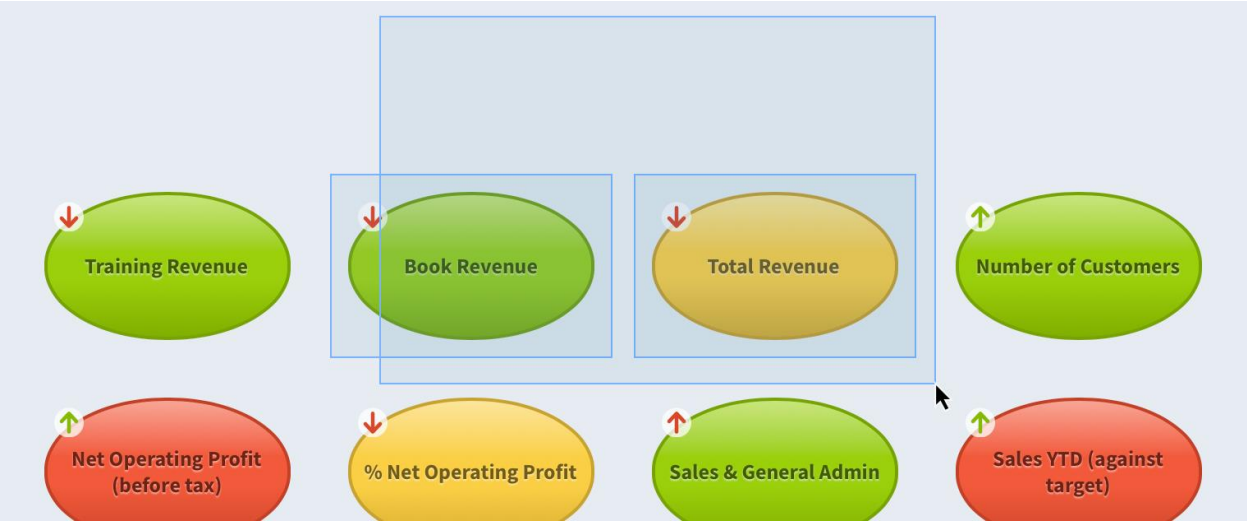
We've added a helpful trick to version 3.3 that allows you to move the selection starting point while you're still creating the selection. In this example we've started to create a selection, but we discover that we're accidentally including the bubble on the left.



Instead of releasing the mouse button and starting a new selection, you can now just hold down the spacebar, and continue moving your mouse. This will lock the selection size, but will move the entire selection box with your mouse.



Once the selection is where you want it, release the spacebar and continue creating your selection.

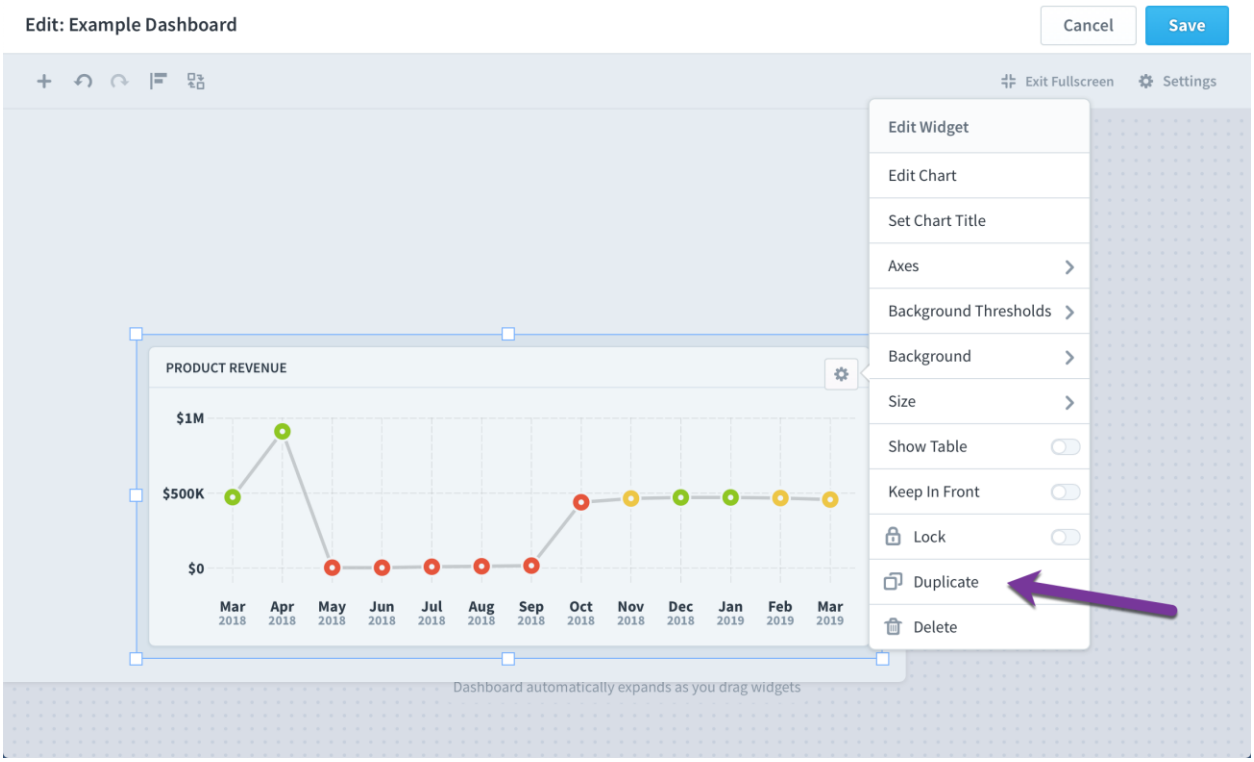


Reordered dashboard widget menus

We've rearranged all of the dashboard widget menu items to be more logical and uniform.

Duplicating dashboard widgets

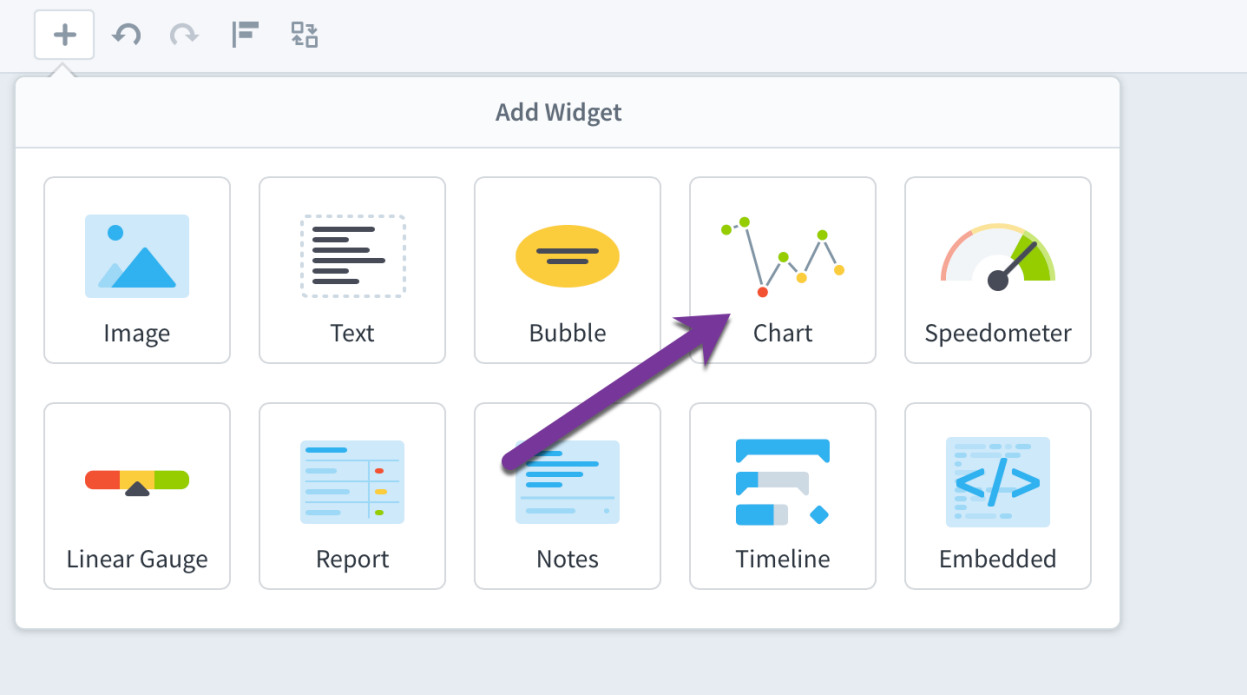
In version 3.3 there's a new menu item for all widgets called "Duplicate".



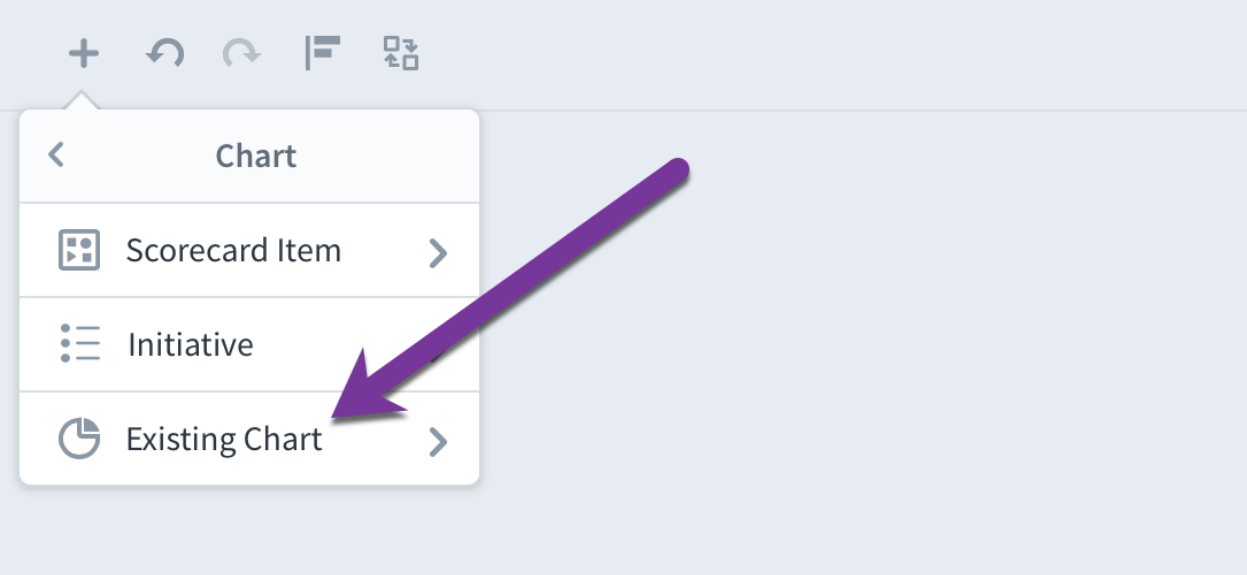
Clicking it creates an identical copy of the selected widget(s).

Quickly adding existing charts to dashboards

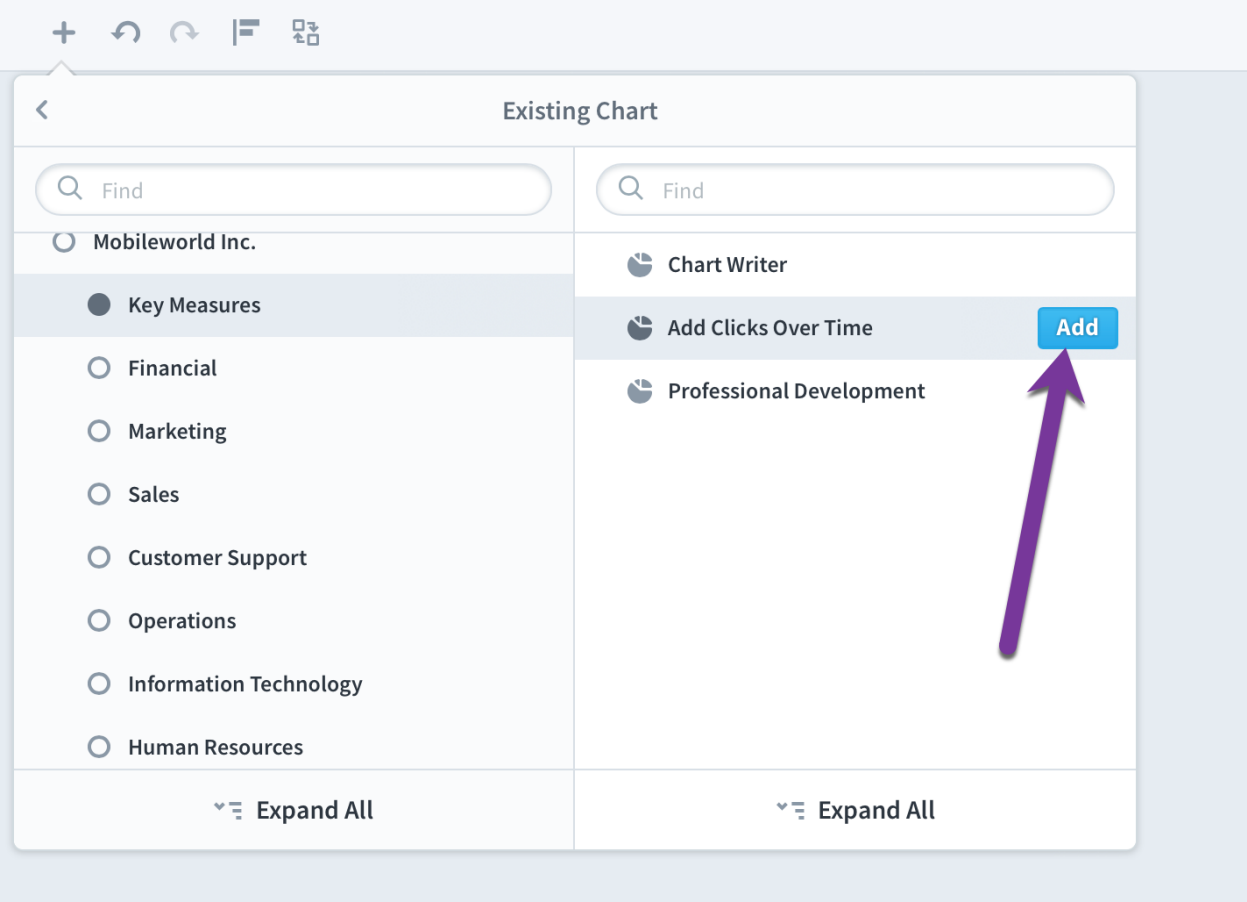
In 3.3 you can now add charts to dashboards directly from the chart option in the add widget menu.

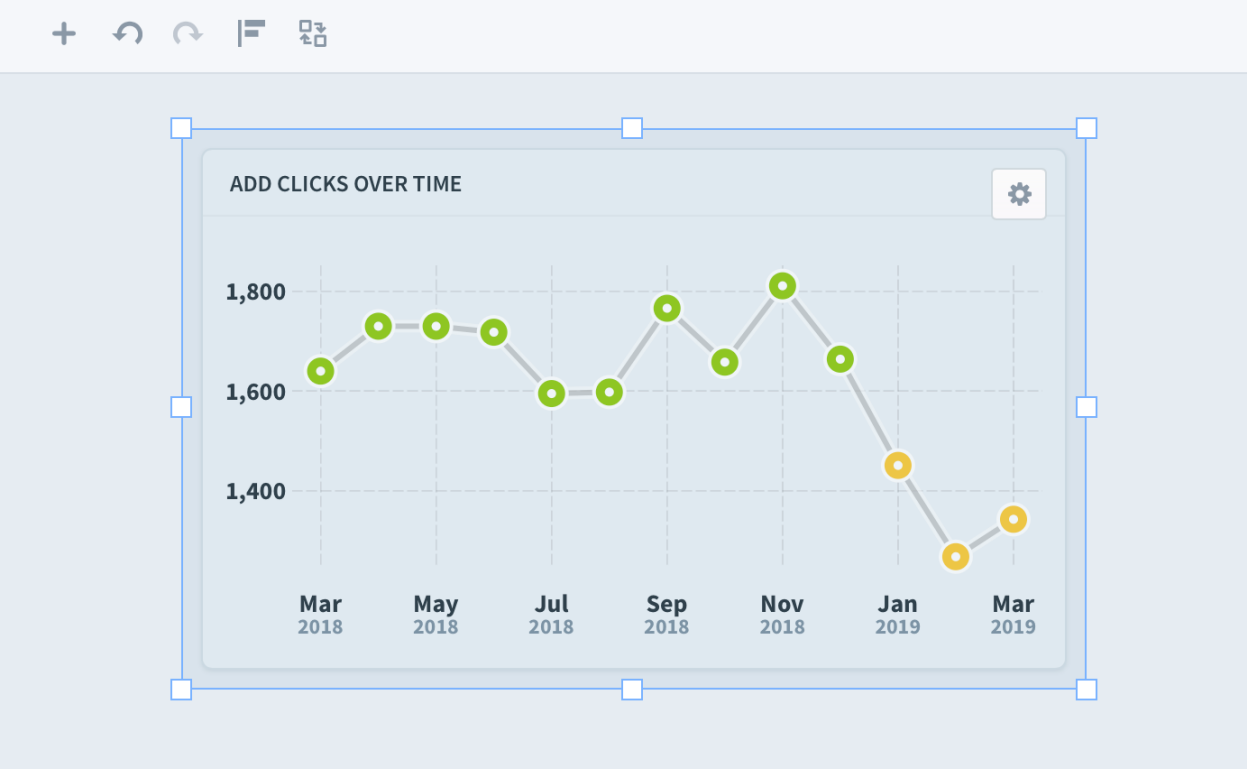


Once you select chart, you'll see the new "Existing Chart" option.



Selecting that allows you to browse through all existing charts in the Charts & Reports section.

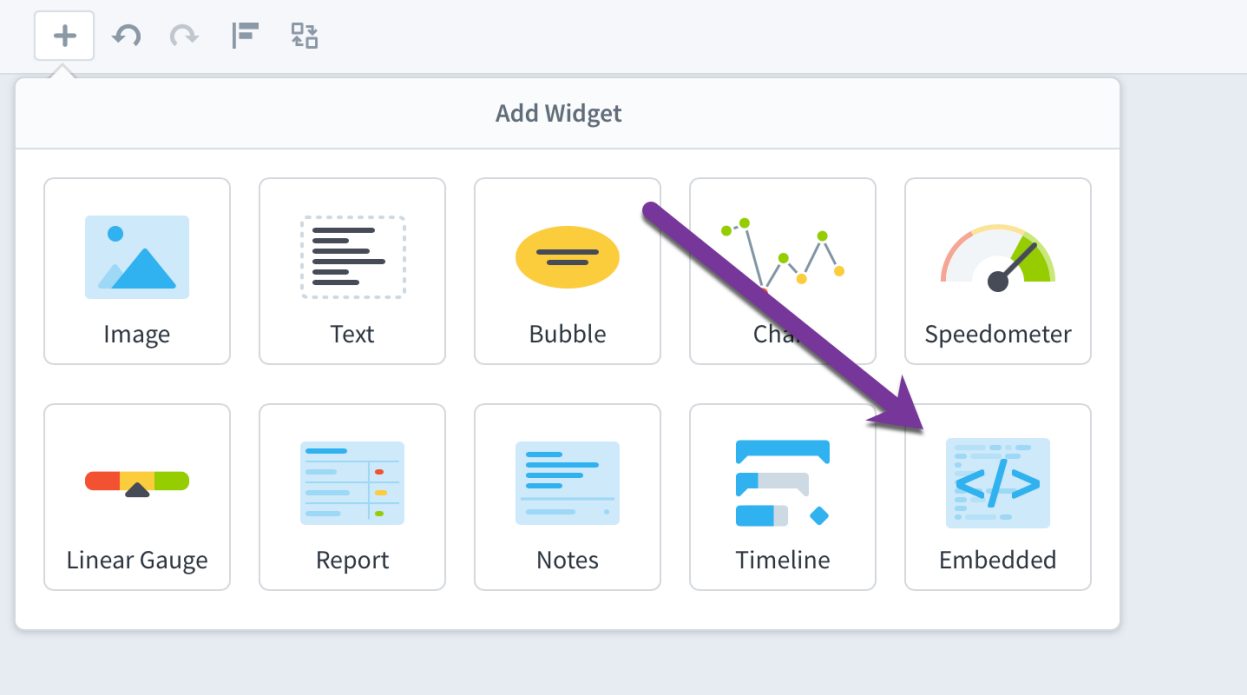

Existing Chart
Find
Mobileworld Inc.
Key Measures
Financial
Marketing
Sales
Customer Support
Operations
Information Technology
Human Resources
Expand All
Find
Chart Writer
Add Clicks Over Time
Add
Professional Development
Expand All


ADD CLICKS OVER TIME
1,800
1,600
1,400
Mar 2018
May 2018
Jul 2018
Sep 2018
Nov 2018
Jan 2019
Mar 2019

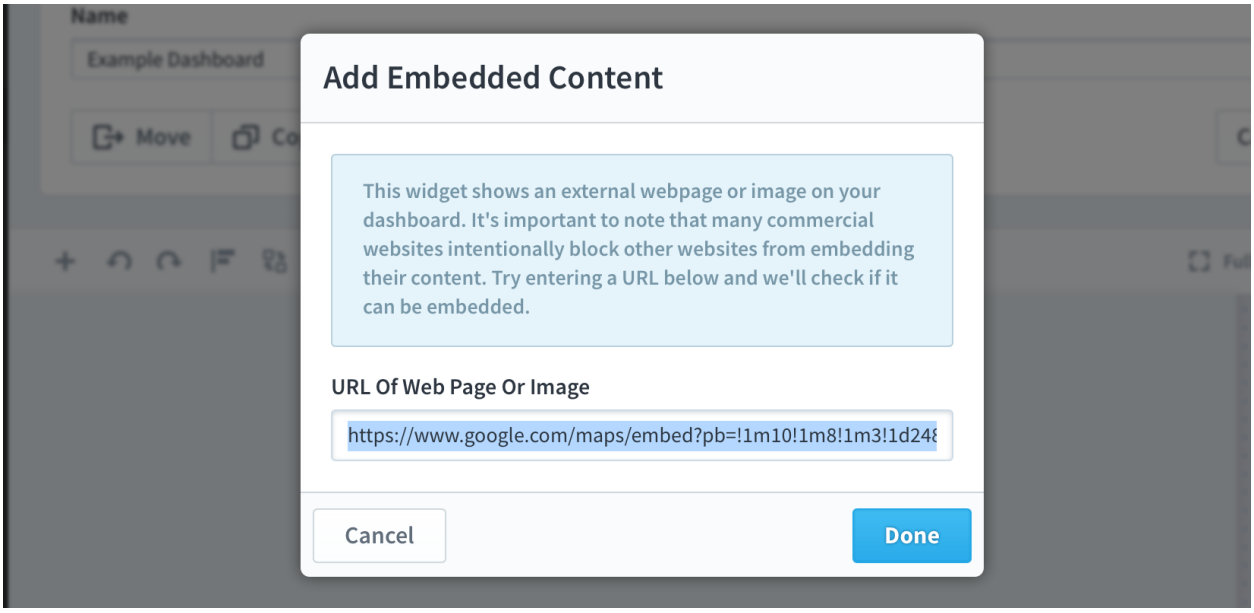
Dashboards: Data Visualization

New embedded content widget

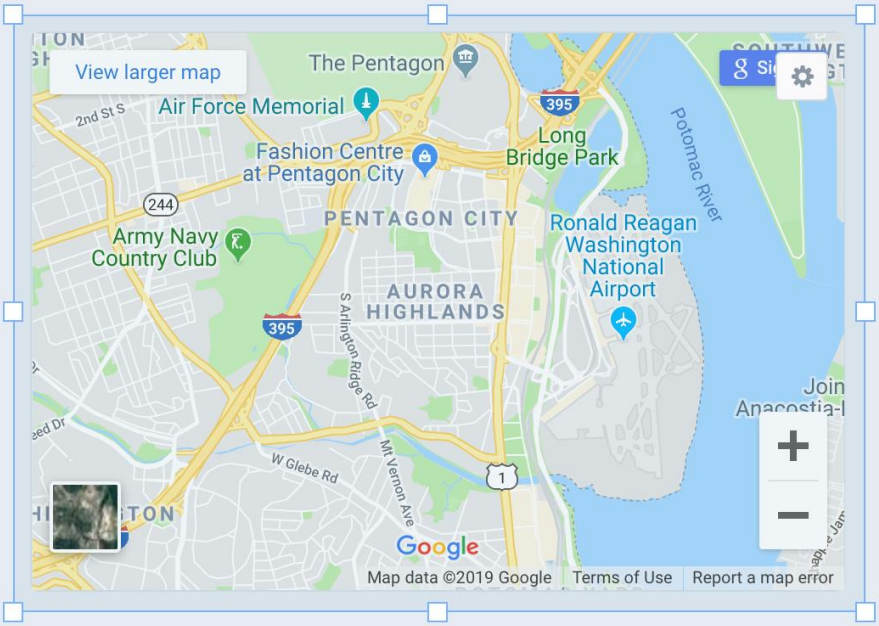
There's a new embedded content widget in version 3.3 that you can choose from the "add widget" menu.



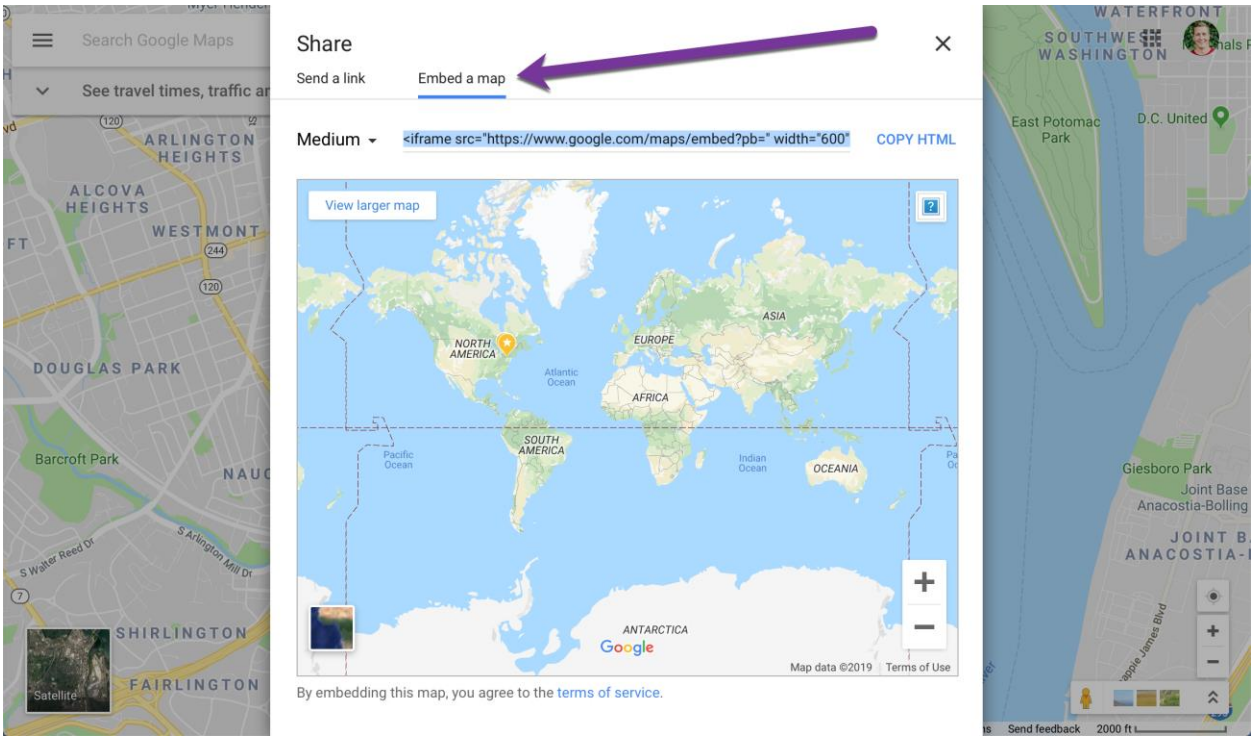
Just paste in the URL of the webpage or image that you want to see on your dashboard.



Scoreboard will then show that website or image in a resizable widget.



It's important to note that many commercial websites intentionally prevent themselves from being displayed in other websites. Because of this, embedded content widgets work best for content that is designed to be embedded. For example, here's the "Embed a map" tab in google maps.



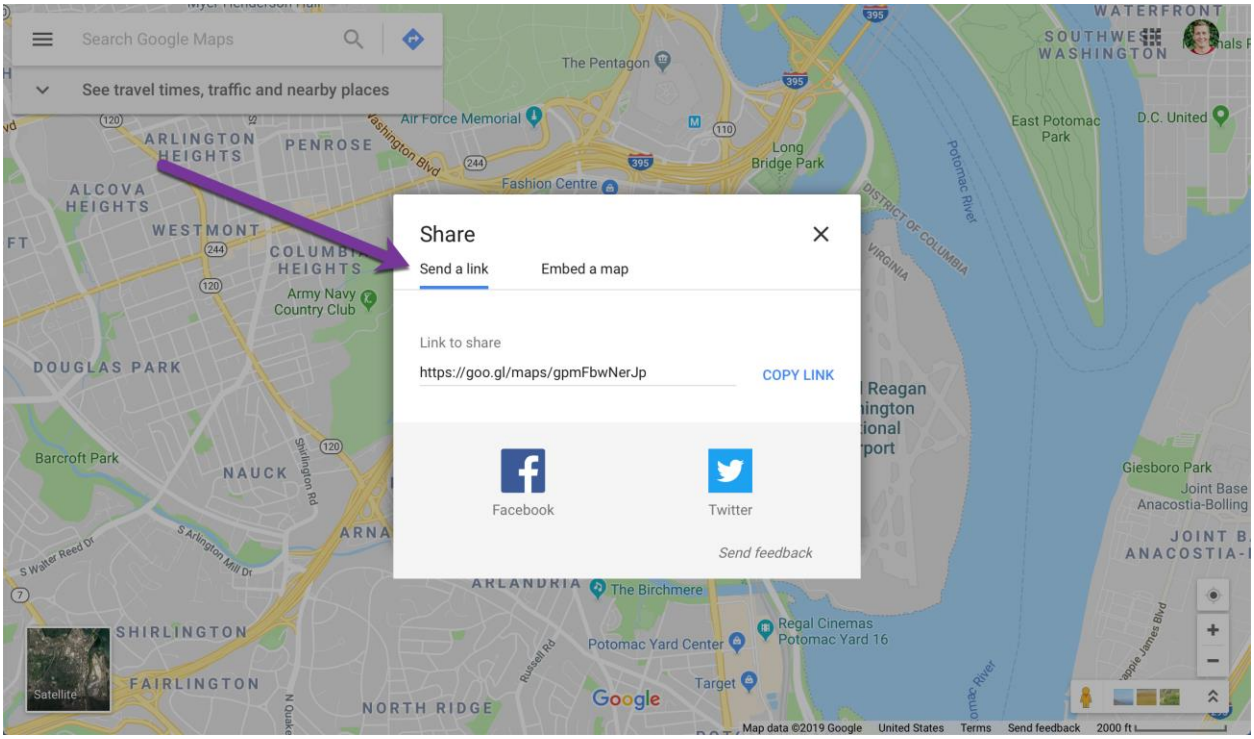
When we copy and paste that code, we get this:

```
<iframe src="https://www.google.com/maps/embed?pb=..." width="600"
height="450" frameborder="0" style="border:0" allowfullscreen></iframe>
```

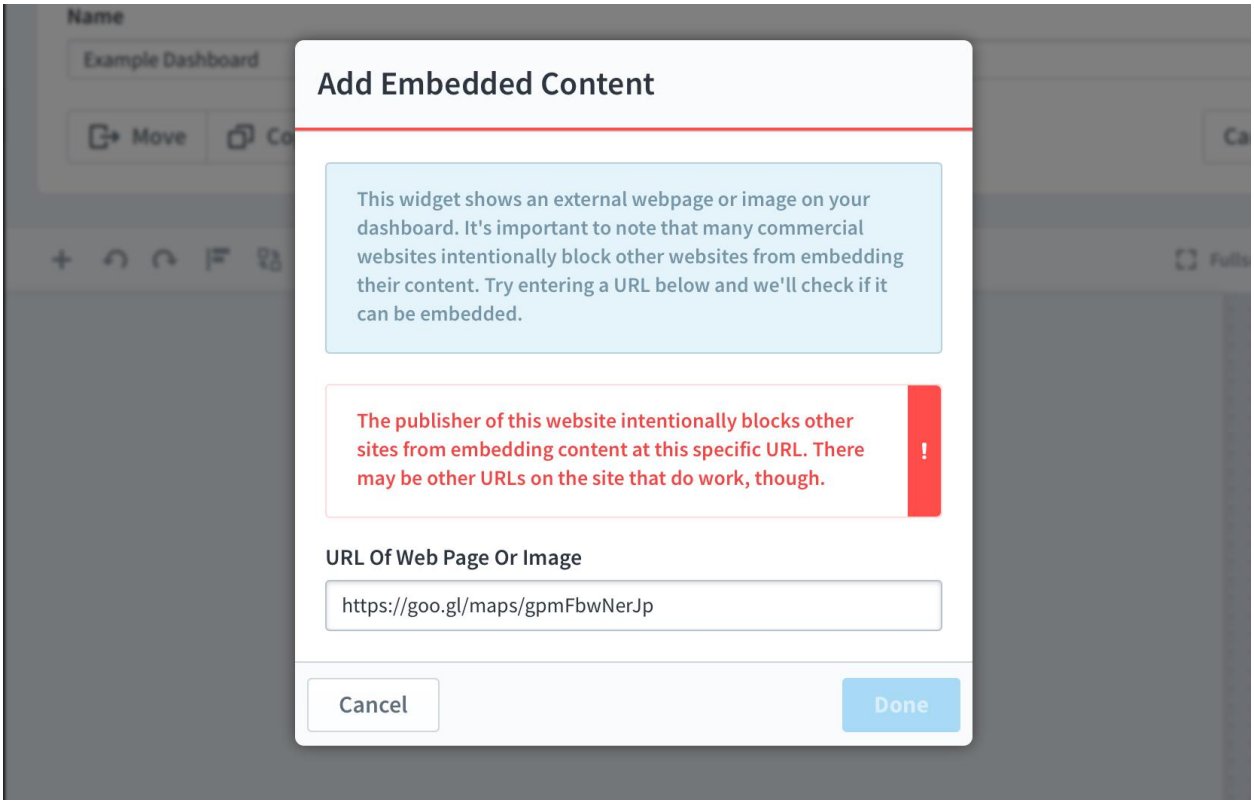
We only want the URL, though, so this part is all we want to paste into the embedded content widget.

```
https://www.google.com/maps/embed?pb=...
```

If, however, we went to the "Send a link" tab in google maps, we'd get a different URL that isn't designed to be embedded.



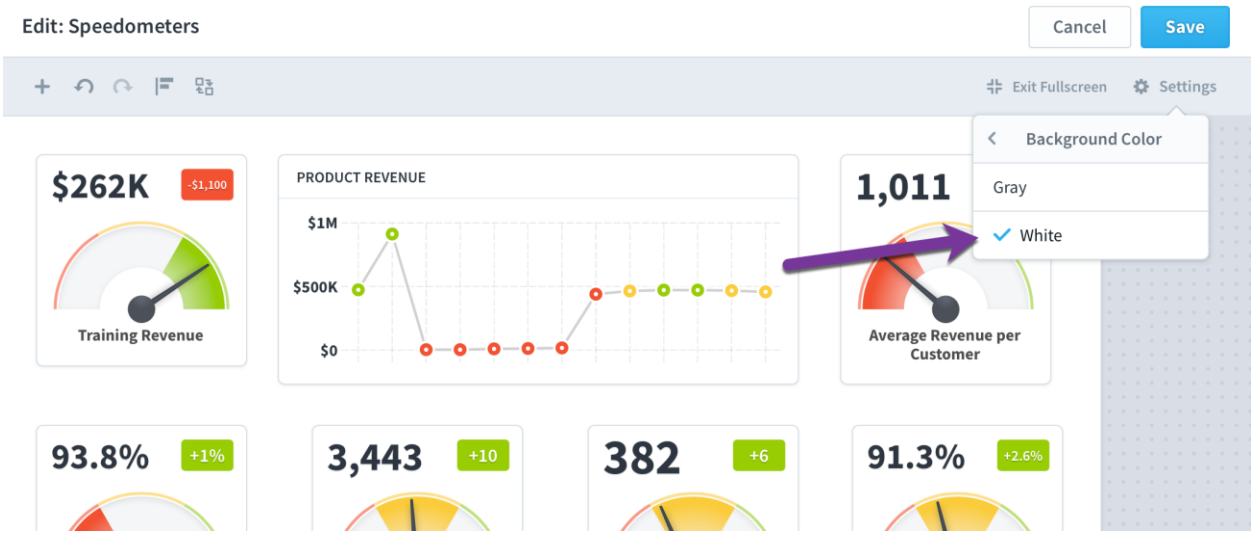
When we paste that URL into the embedded content widget, Scoreboard will show an error that looks like this.



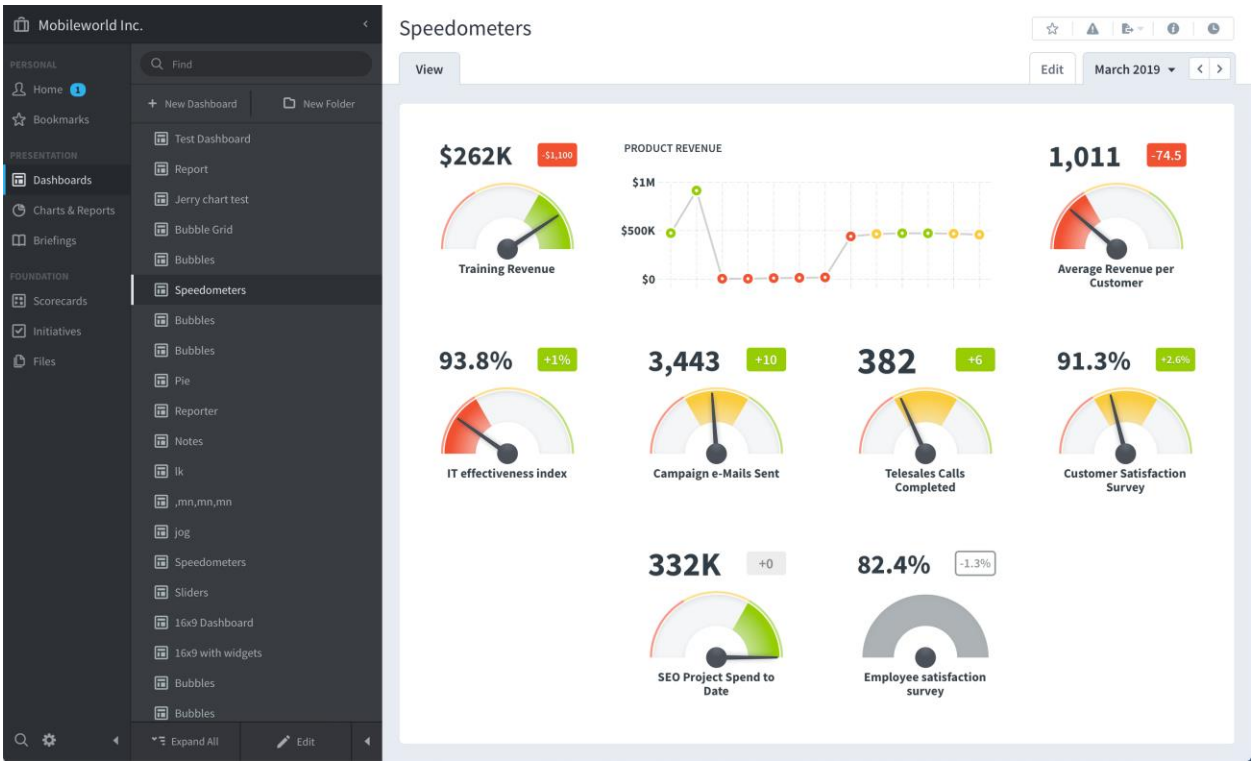
Finally, it's important to note that any URL you use has to be HTTPS, not HTTP. Scoreboard is a secure site, and web browsers prevent insecure content from being displayed in secure sites.

White backgrounds for dashboards

Scoreboard 3.3 now gives you the ability to choose a white background color for dashboards.

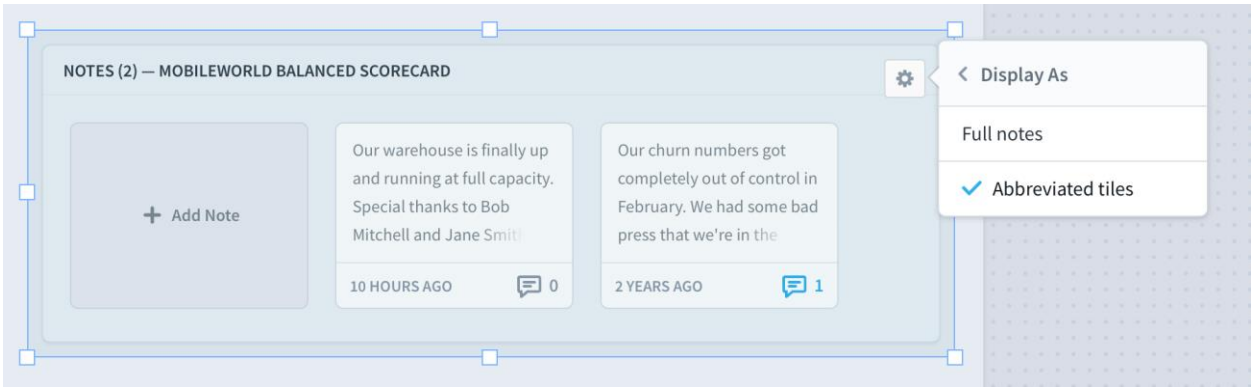


This allows you to create dashboards with a variety of new styles. For example, here's a white dashboard with the widget backgrounds turned off.

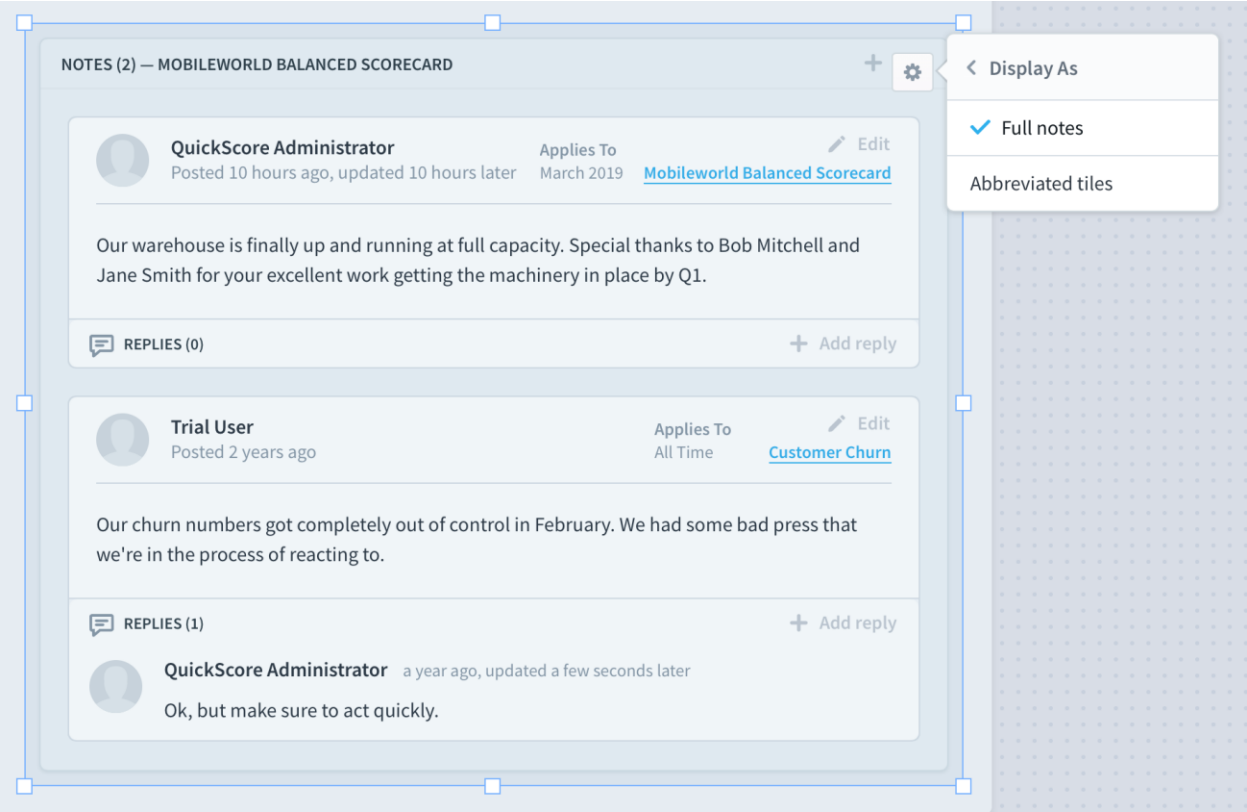


Displaying full notes on dashboards

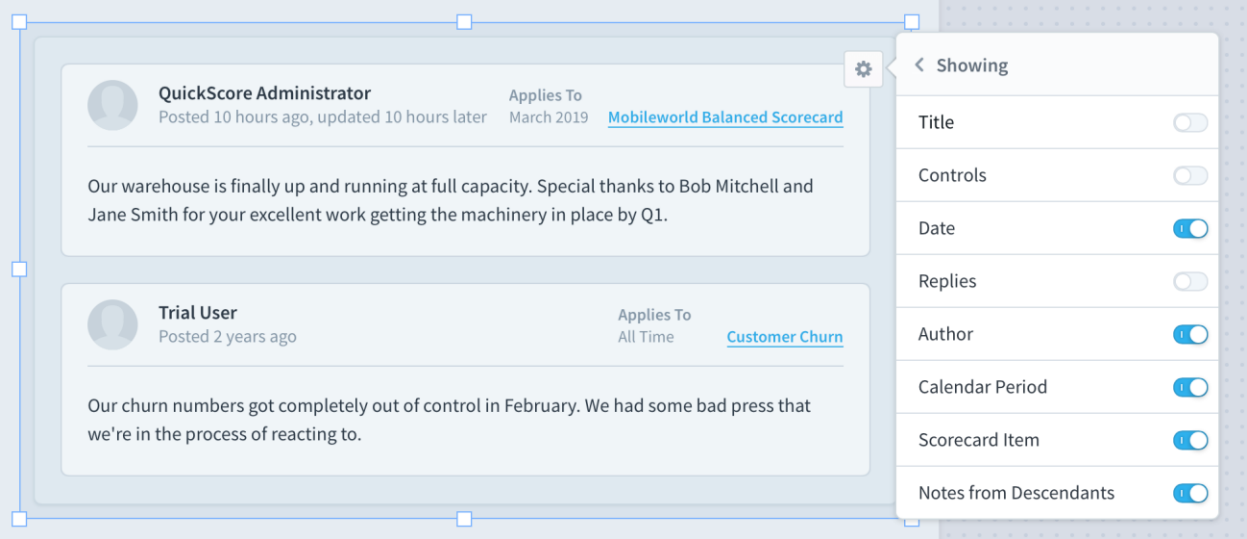
There's a new "Display As" option for notes widgets in version 3.3. The default appearance is "Abbreviated tiles" which is the traditional appearance of notes widgets. Every note is a separate tile, and if you click on the tile, it shows the entire note and its replies in a dialog.



If you choose the new "Full notes" option, you can now see the entire note and reply text directly on your dashboard.



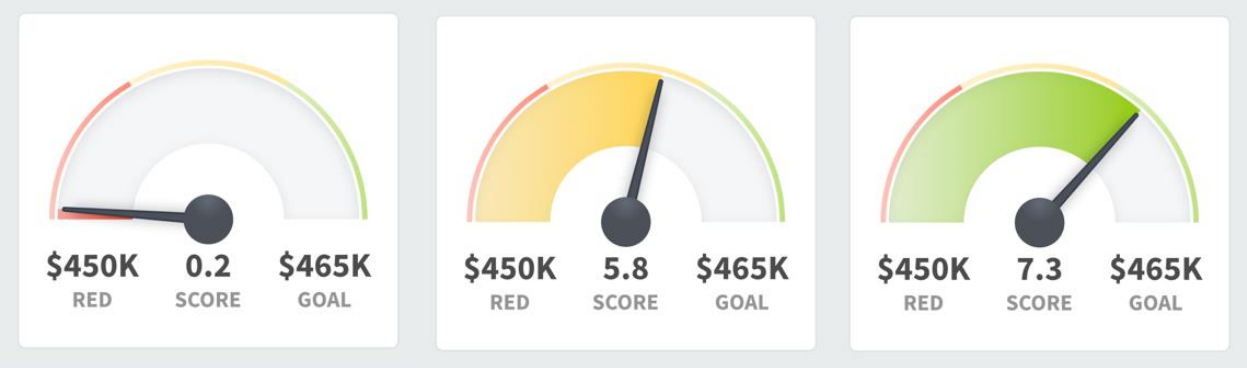
You can choose which things you want to display too. In this example, we've decided not to show the title, replies, or the editing controls.



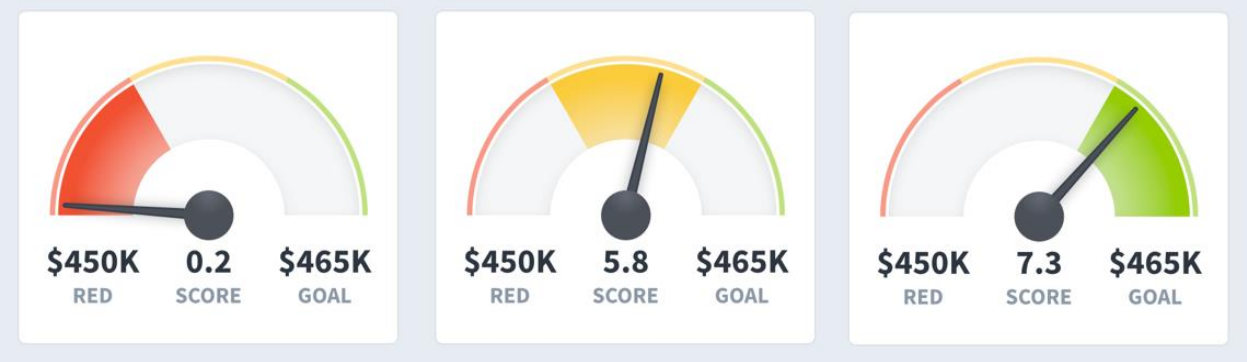
Improved speedometer design

In previous versions of Scoreboard, speedometers showed the current performance color filling up from one side. This worked well for all situations

except for very low values. In this example, it's very hard to see at a glance how the red speedometer on the left is performing.



In version 3.3, speedometers now have the current performance region filled in. This makes them much easier to read, especially for lower values.



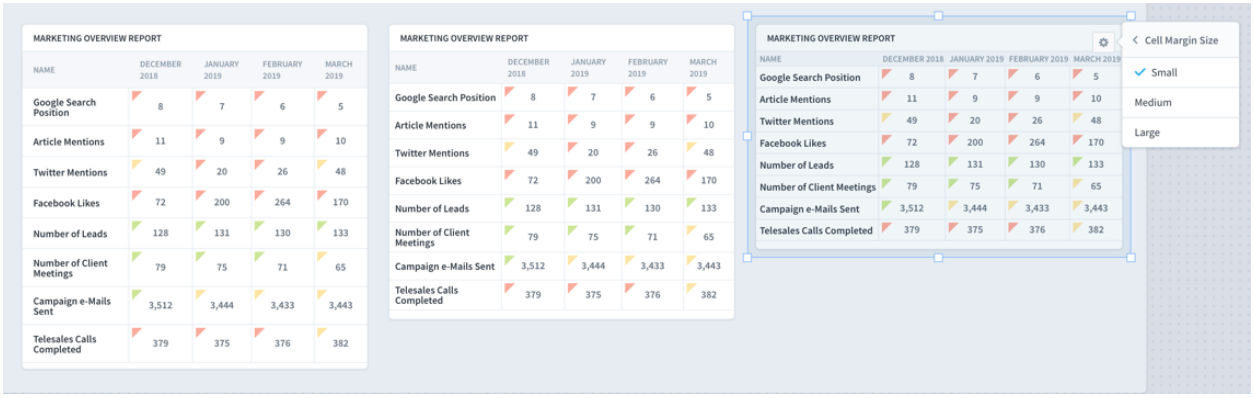
Choosing report widget font size

There's now an option to change the font size for report widgets.

In this example we've increased the font size so that the data inside of the table is much larger.

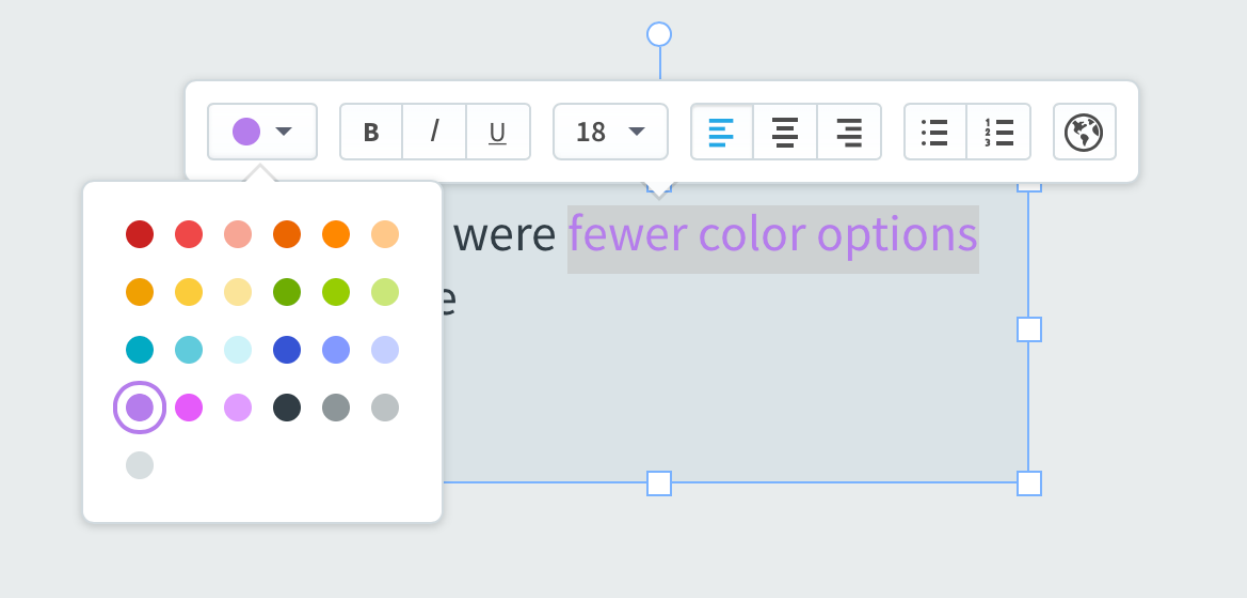
Choosing report widget cell margins

In version 3.3 you can now choose the size of each cell's internal margin. In the example below you can see the same report with Large (default), Medium, and Small.

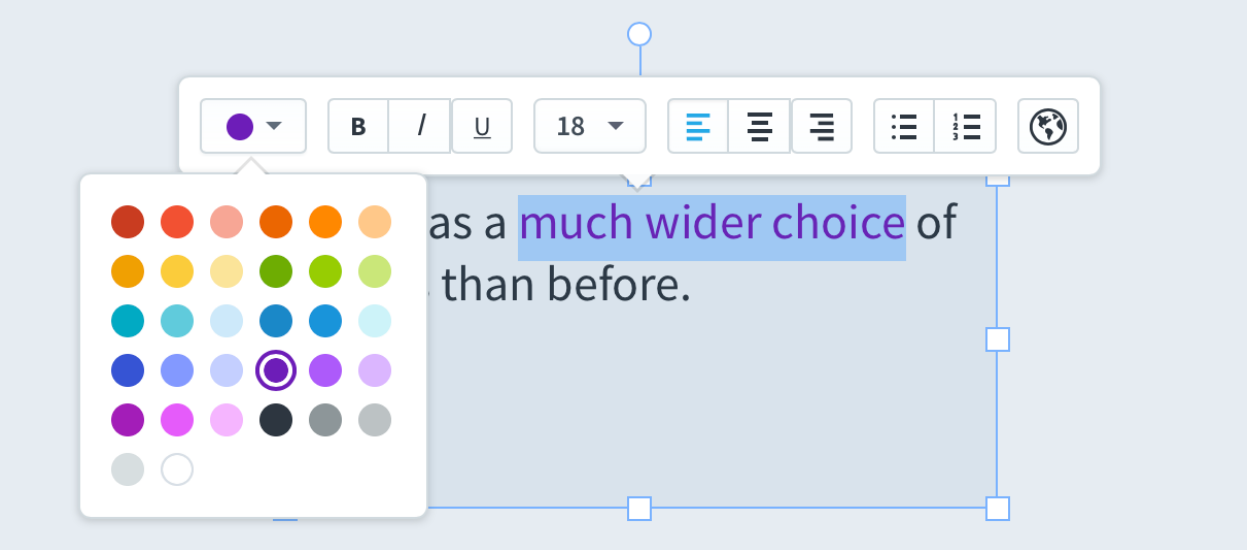


Expanded color palette choices

These are the text colors were available in previous versions of Scoreboard.

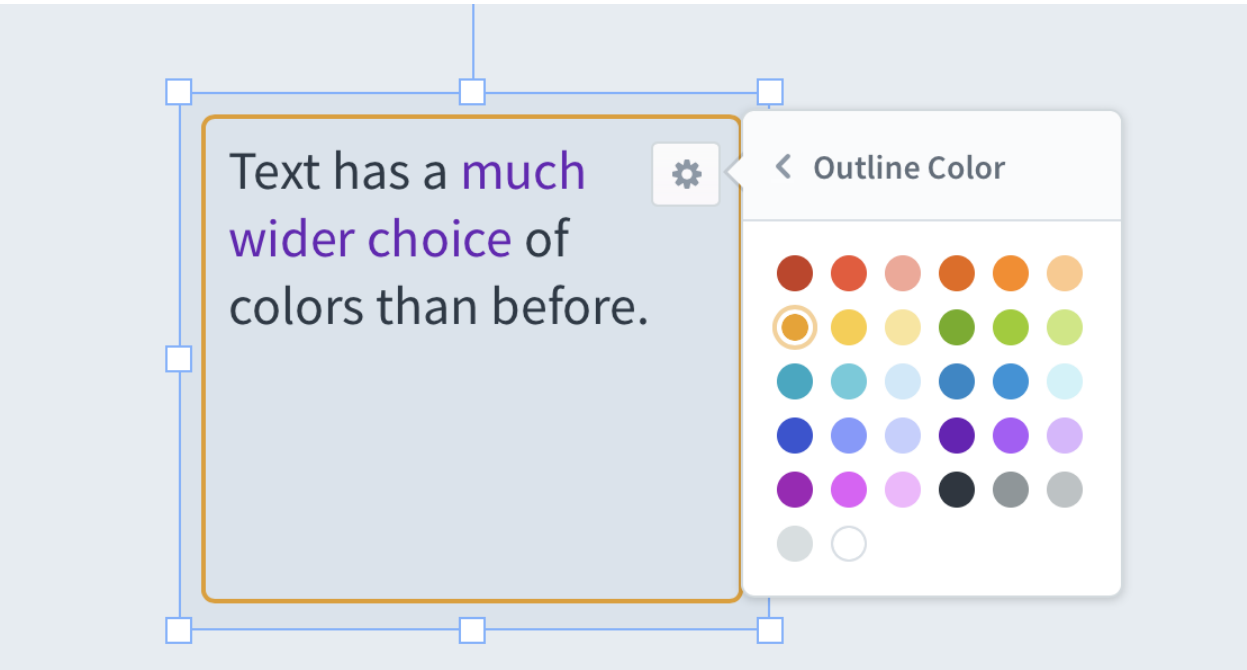


In version 3.3, there are several more color options available for all color selections, including text, outlines, and charts.



Choosing text widget outline color

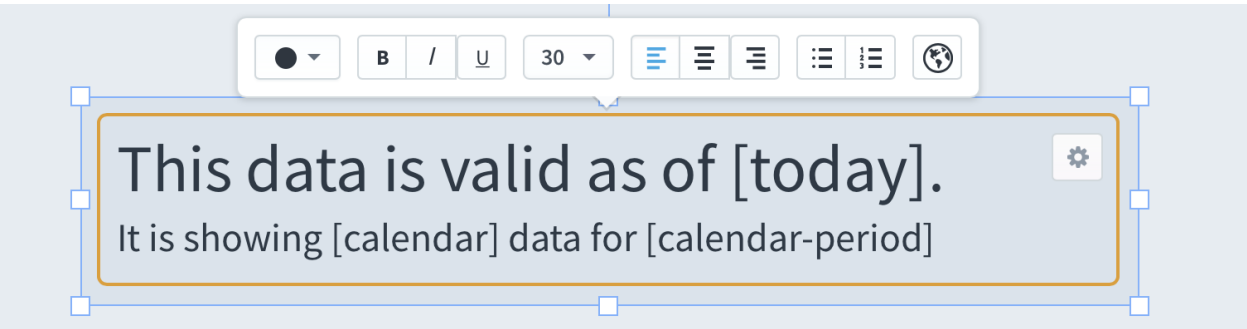
In version 3.3 you can now choose an outline color for your text widget as well as the outline thickness.



Dynamic values in text widget

You can now use the following variables in text widgets:

- [today]
- [calendar]
- [calendar-period]

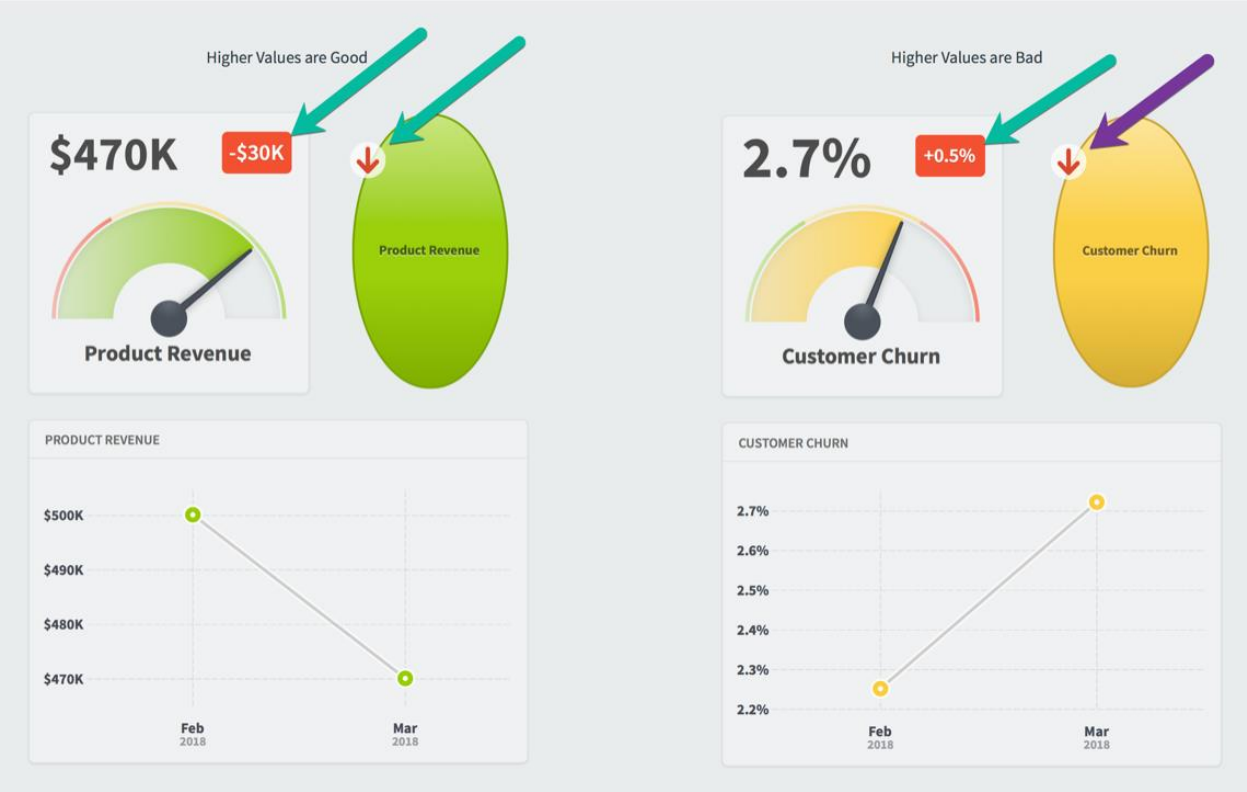


When you view the dashboard, these variables will be automatically replaced.

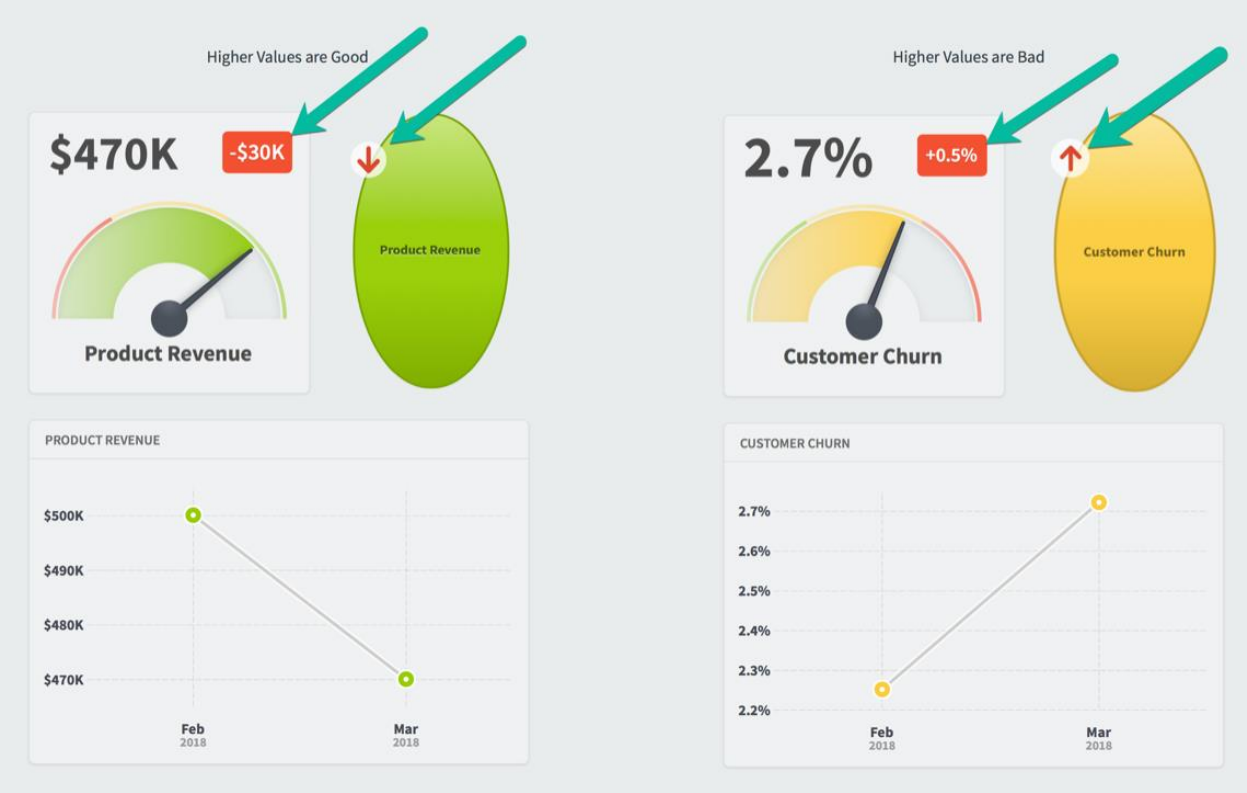
KPI trends based on value instead of score

In previous versions of Scoreboard, the trend indicators on performance bubbles were red arrows pointing down when performance was worse, and green arrows pointing up when performance was better. This worked well for KPIs where higher values were better, because a red down arrow correctly represents worse performance and lower values.

When higher values are worse for a KPI, however, this breaks down. When this type of KPI is gets worse, its value is trending upward. You can see in the example below how the performance bubble trend arrow is pointing downward, while at the same time the speedometer trend shows a 0.5% increase.

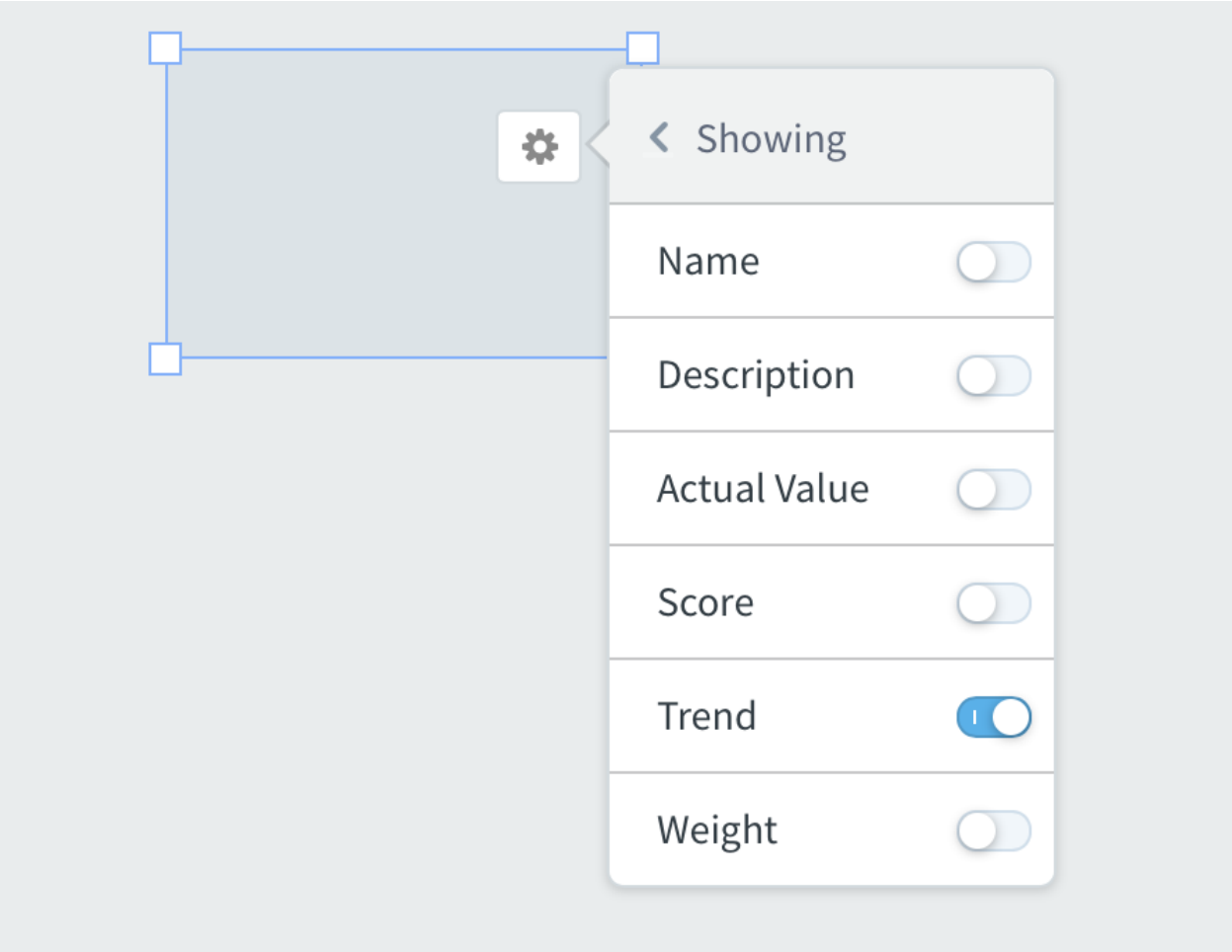


In version 3.3, performance bubbles' trend arrows now have independent colors and directions. For KPIs where higher values are good, there's no change. For KPIs where higher values are bad, there will be a red up arrow when values are higher, and a green down arrow when values are lower.

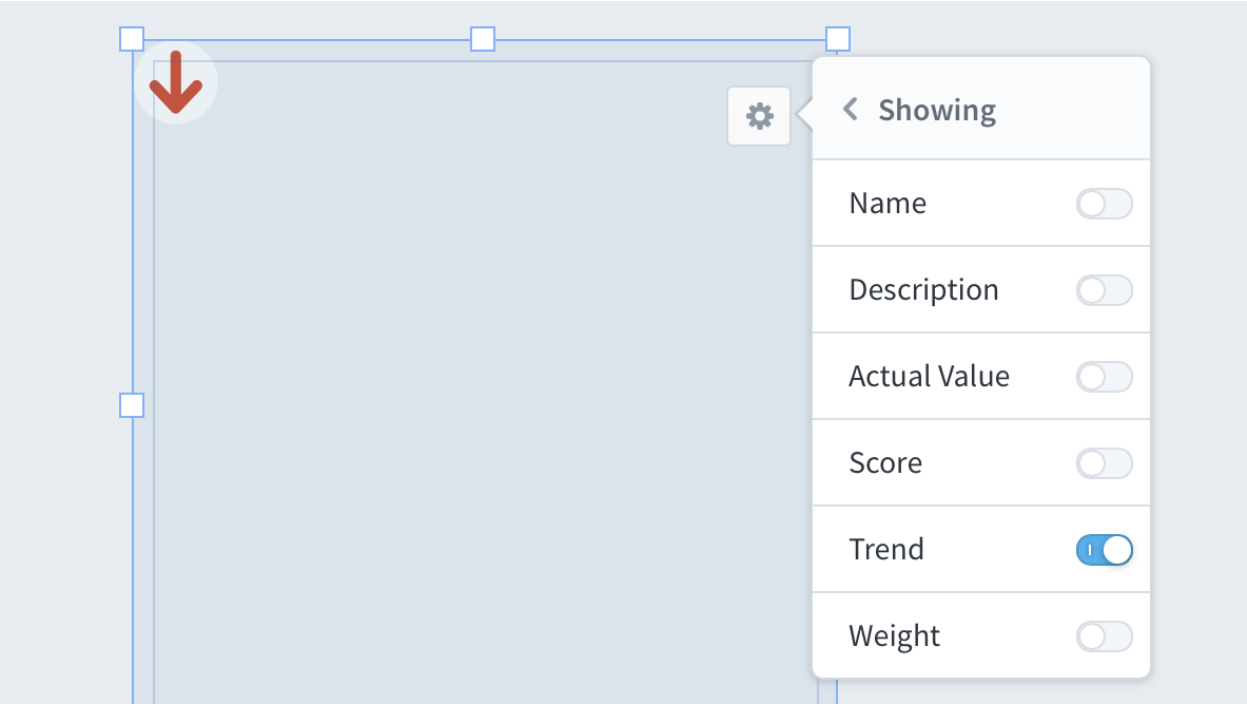


Showing only trend arrows on bubbles

In previous versions of Scoreboard, if you tried to only show the trend for a performance bubble, nothing would appear.



In version 3.3 it now shows just the trend indicator, just as you specified.

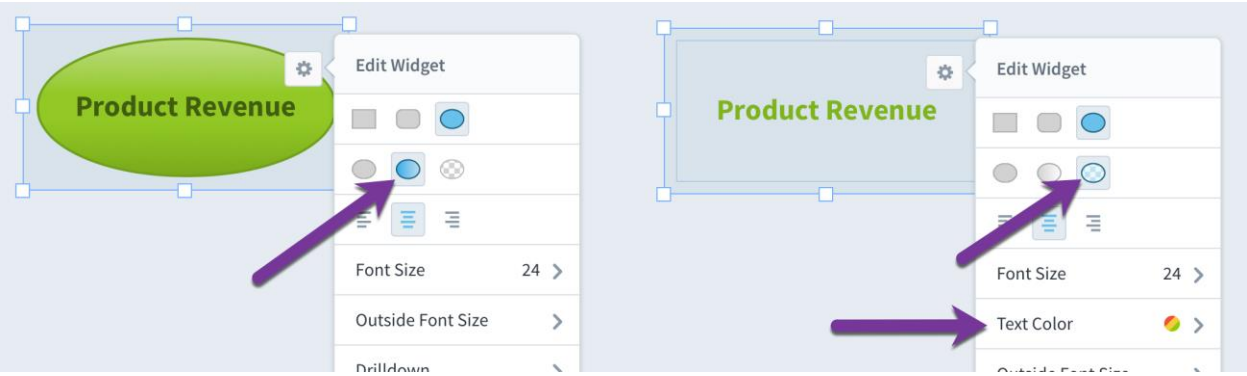


This allows you to get creative and put trend indicators anywhere you want on dashboards.

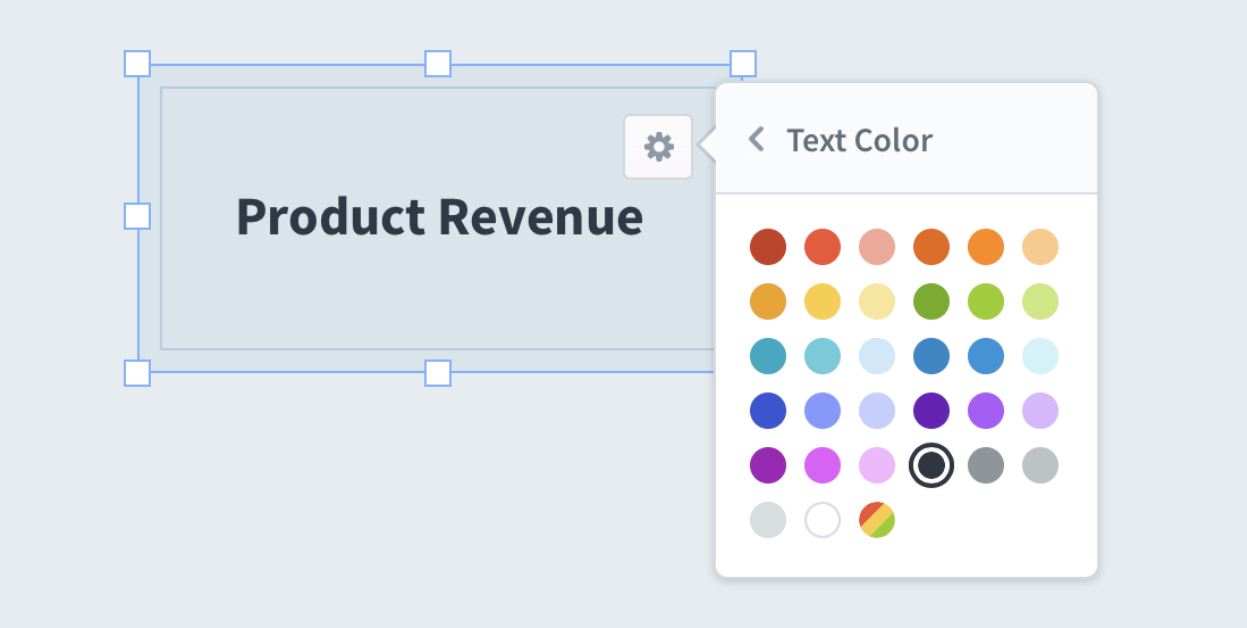
Choosing color for text-only performance bubbles

The left image shows a performance bubble with a gradient fill. The right image shows a performance bubble with no fill, and the bubble's text color represents its performance.

In version 3.3, there's a Text Color menu item that appears when the fill is set to none.

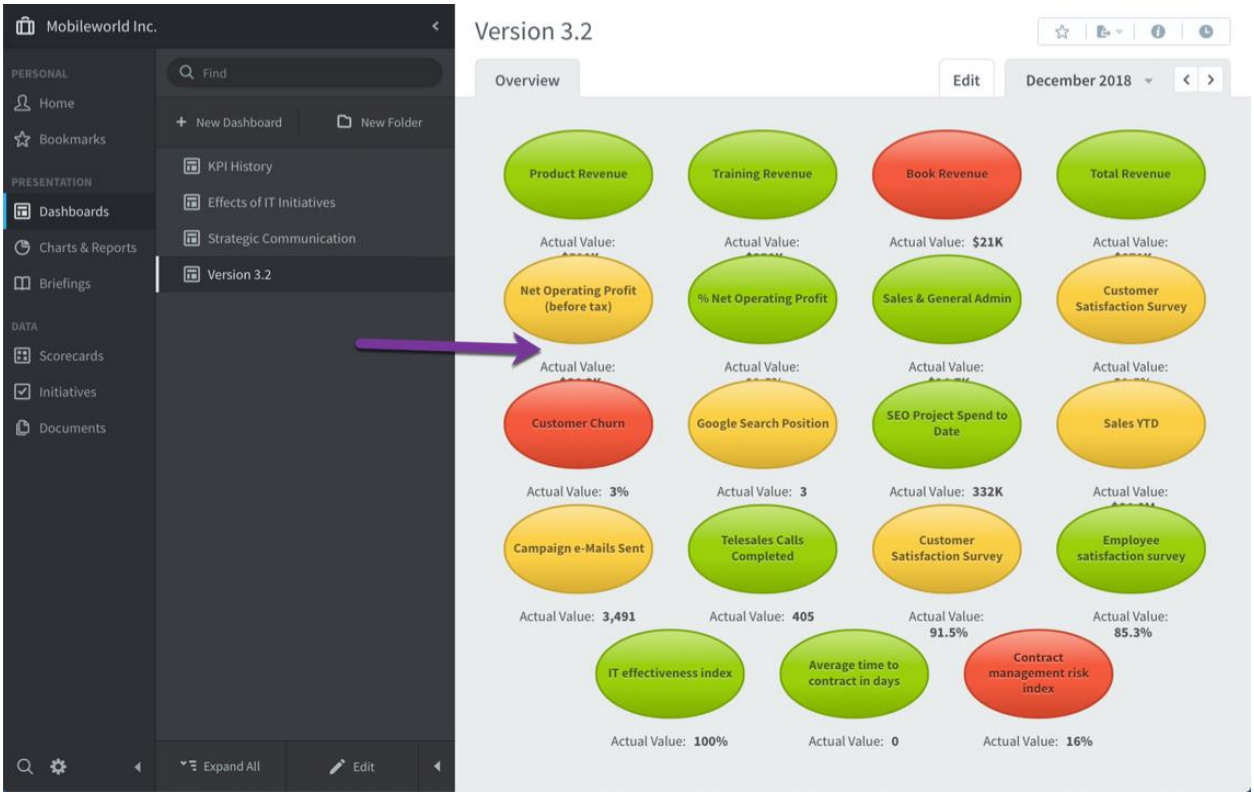


This allows you to override the default coloring and choose a specific color to use for the bubble text.

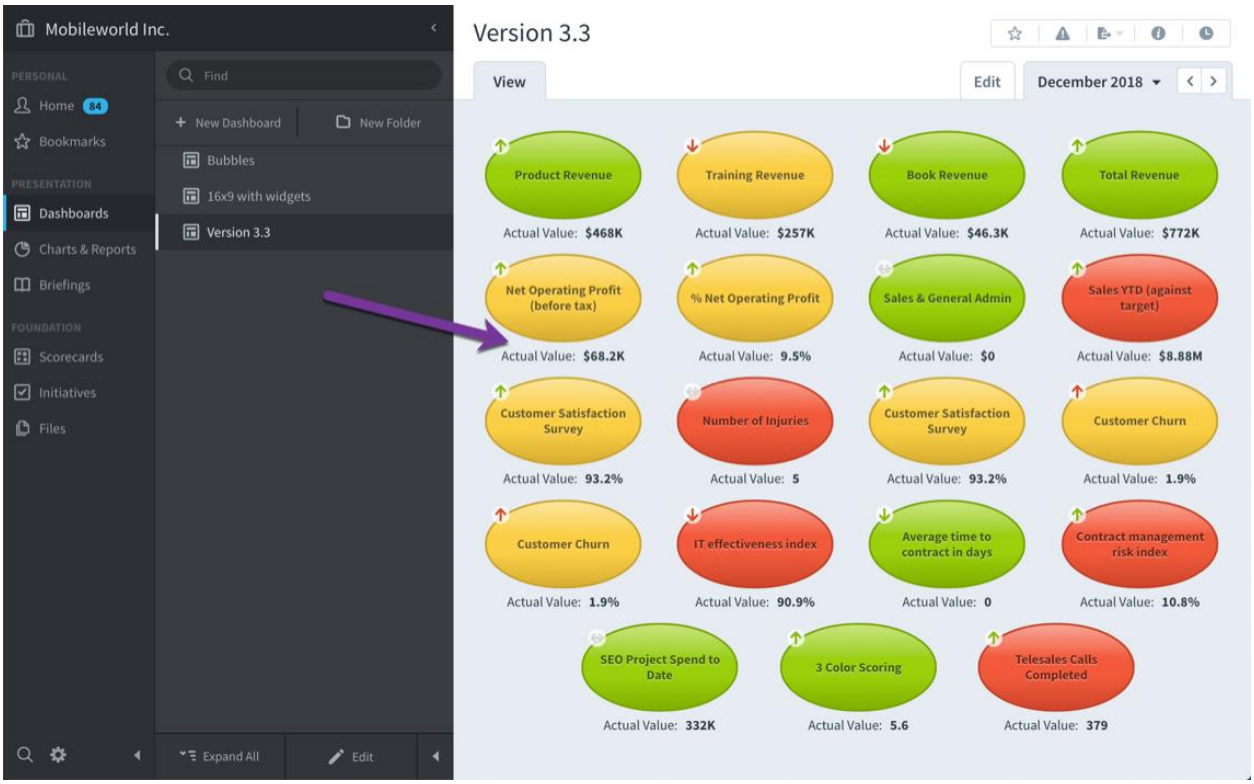


Performance bubble labels are closer

In previous versions of Scoreboard, you could choose to display additional information below performance bubbles.

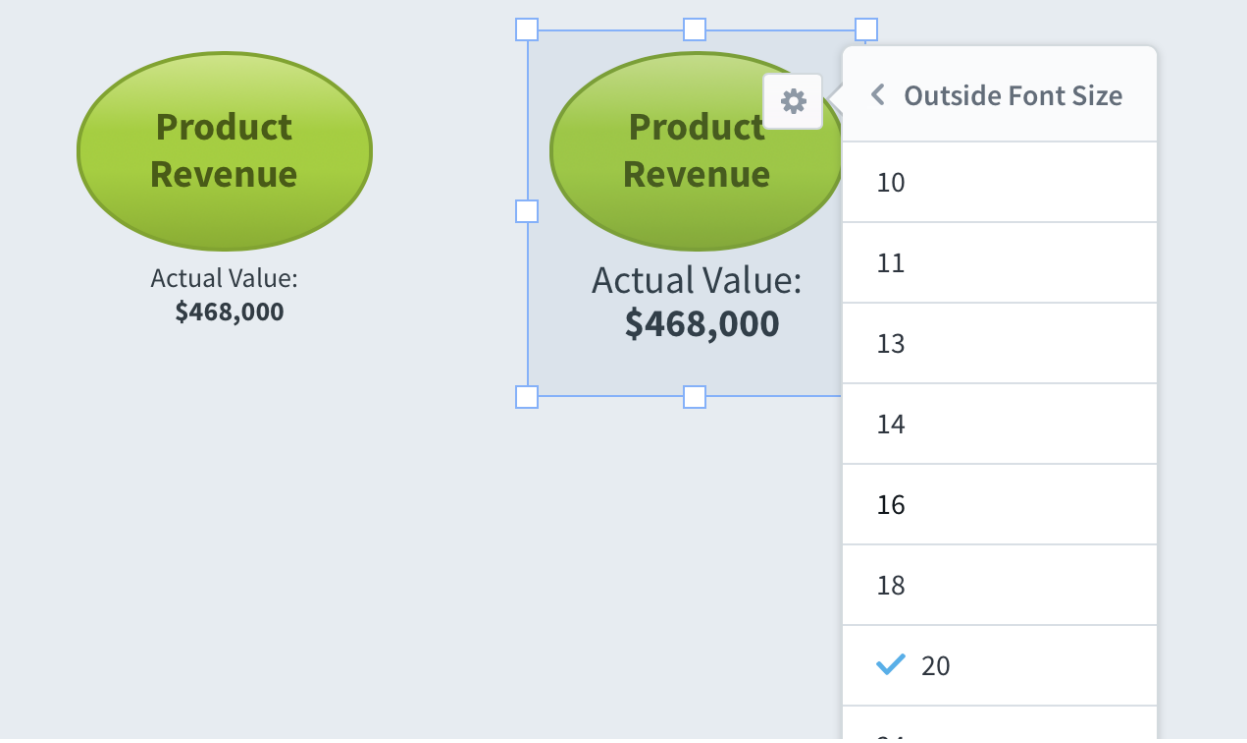


This is still possible in version 3.3, but the labels are now closer to the bubbles. This allows performance bubbles to be placed closer to each other on dashboards.



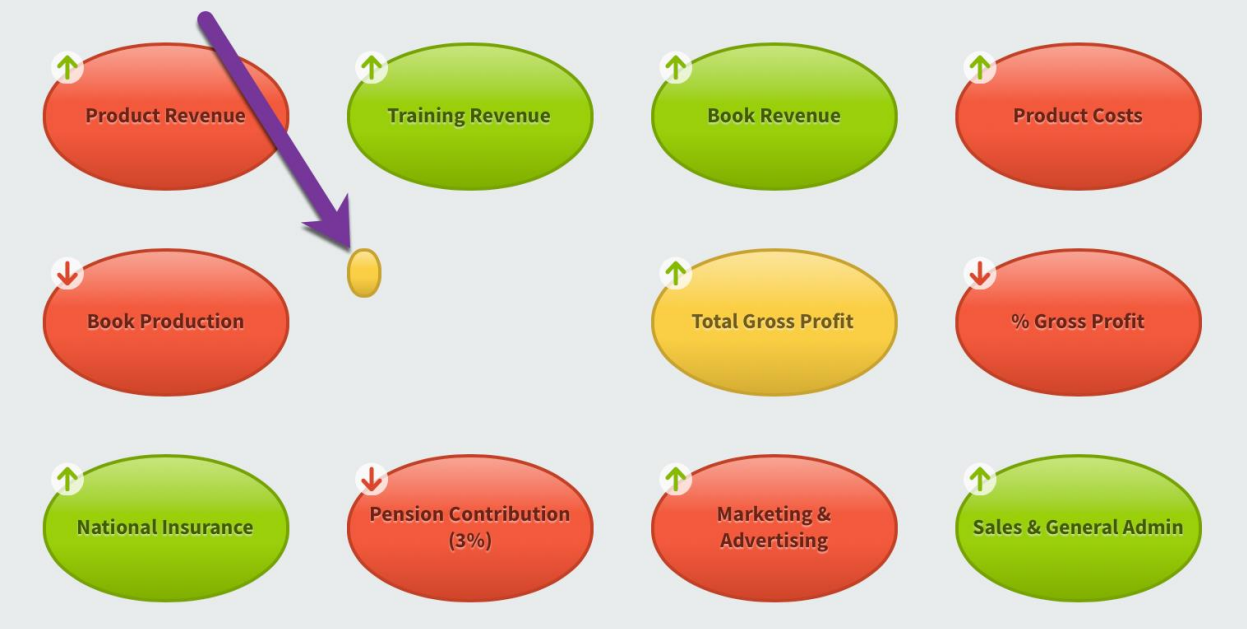
Changing performance bubble outside font size

In version 3.3 you can now change the font size for text outside of performance bubbles. This is a separate setting from the existing ability to change the inside font size.

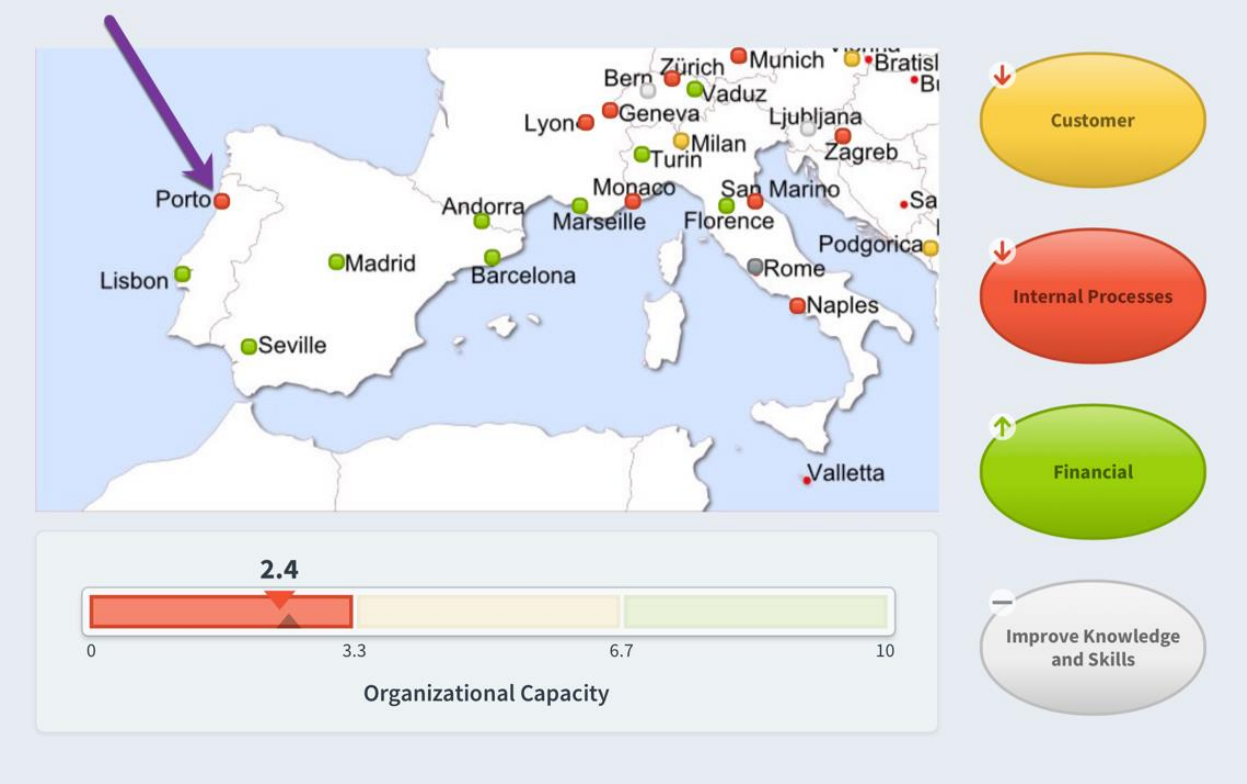


Creating smaller performance bubbles

In previous versions of Scoreboard, this is the smallest size of bubble that you could create.

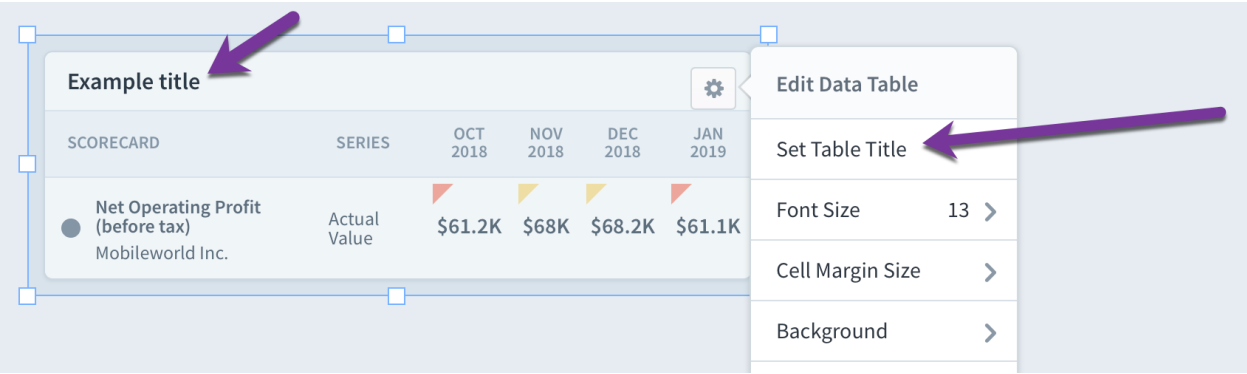


In version 3.3 you can create bubbles that are much smaller. This is useful in situations like this example that shows the performance of cities on a map.



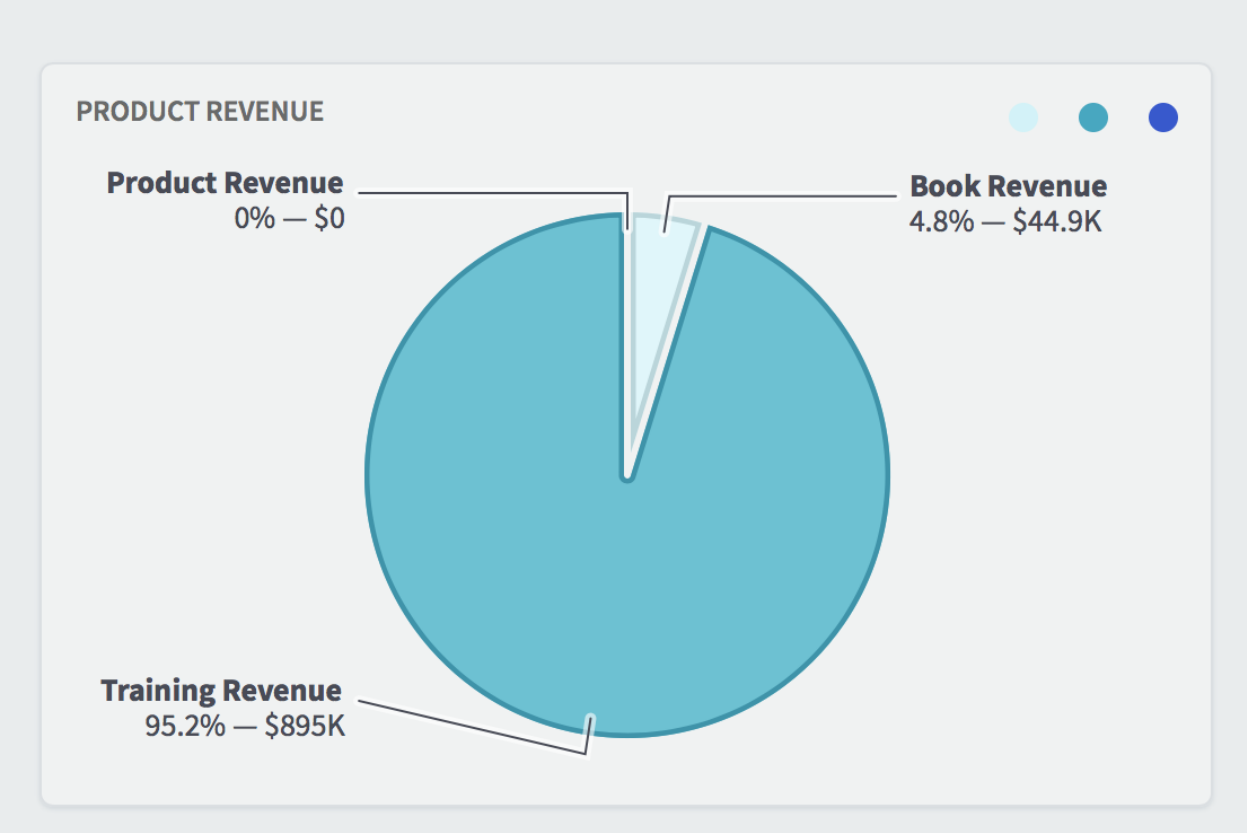
Setting chart data table title

In version 3.3 you can now set the title for chart widget data tables, or you can choose to turn it off completely.

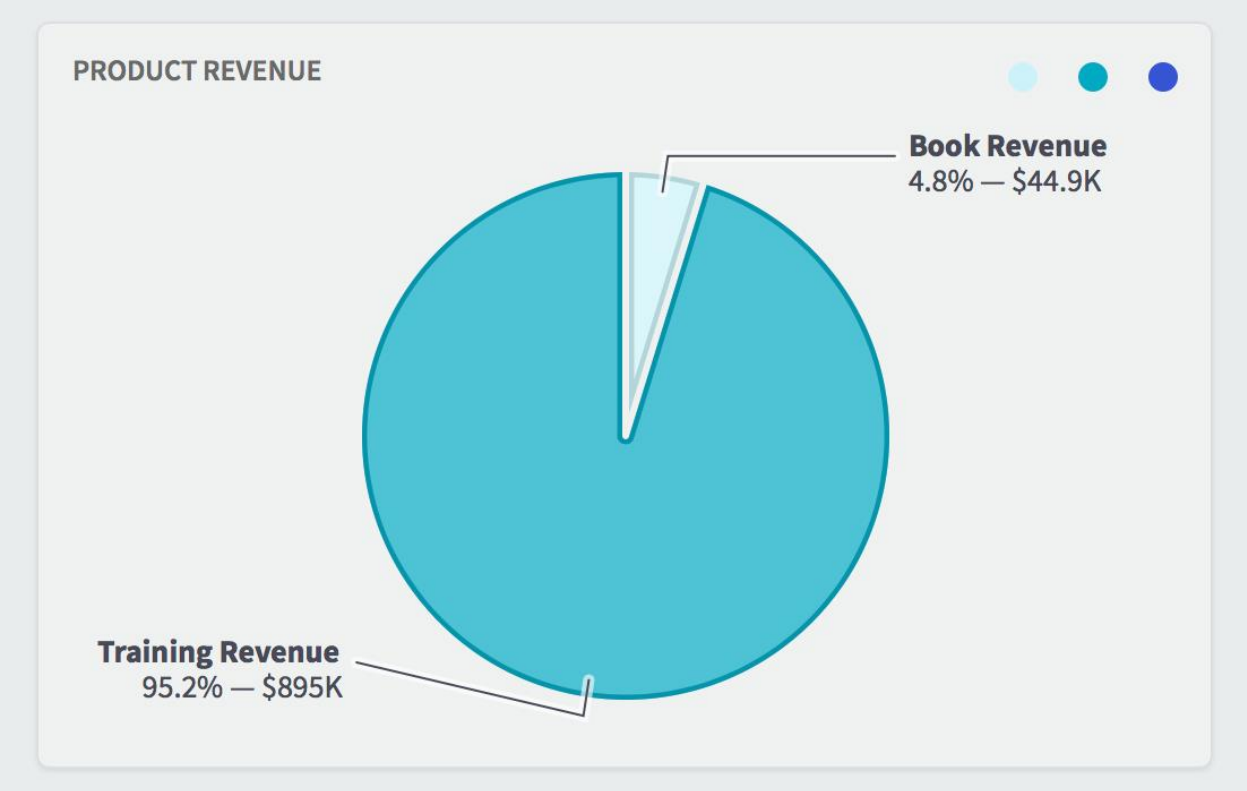


Pie charts ignore zeros

In previous versions of Scoreboard, pie charts would include labels for series that didn't have a slice of pie that period.

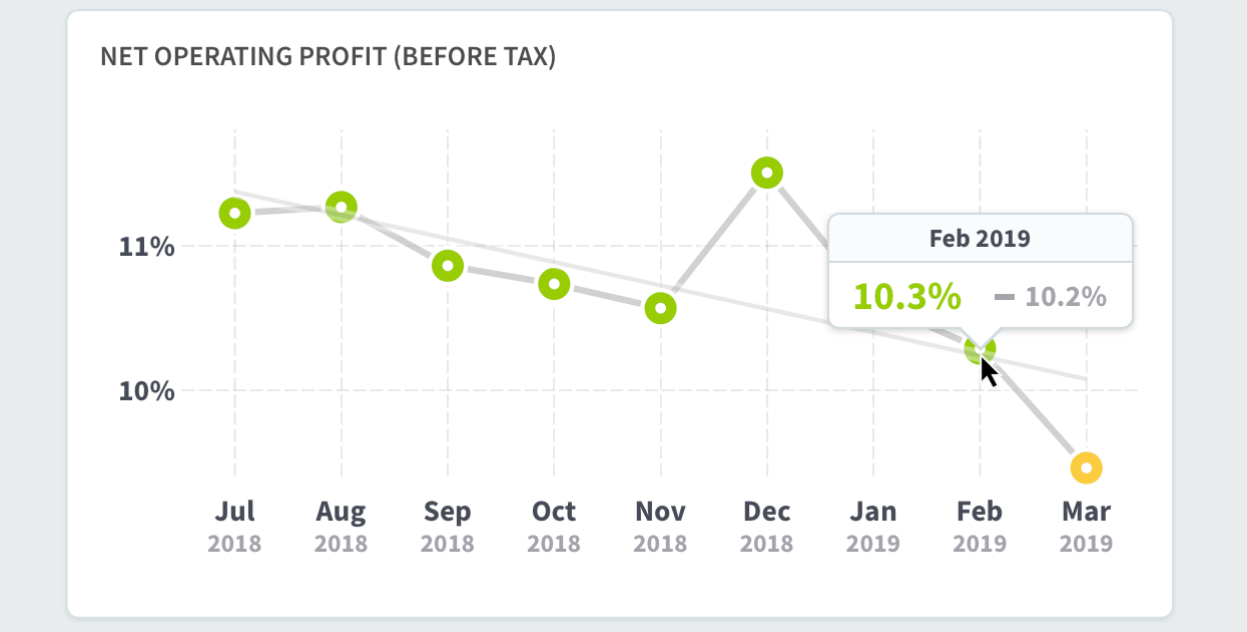


In version 3.3 it only displays labels for slices.



New trend line icons

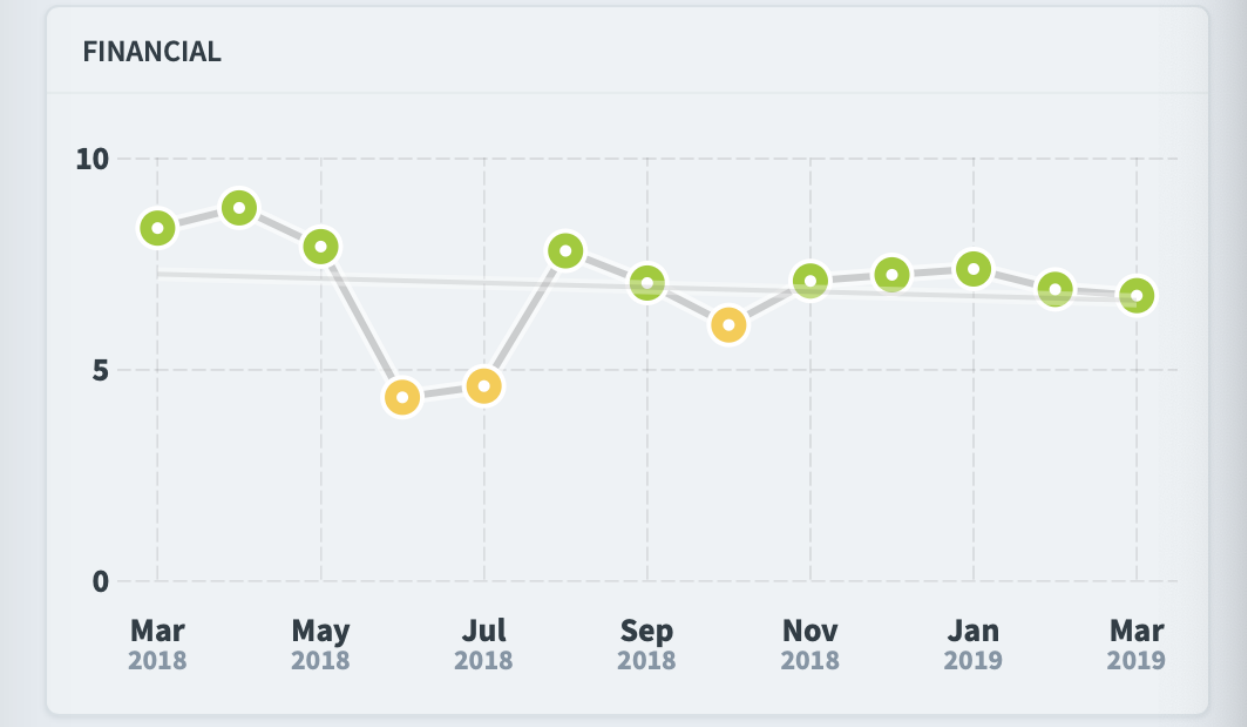
In previous versions of Scoreboard, we included all values in the chart tooltips, including trendline values. To differentiate the trend line number from the line chart number, we made the trend line text smaller and we put a trend line icon next to it.



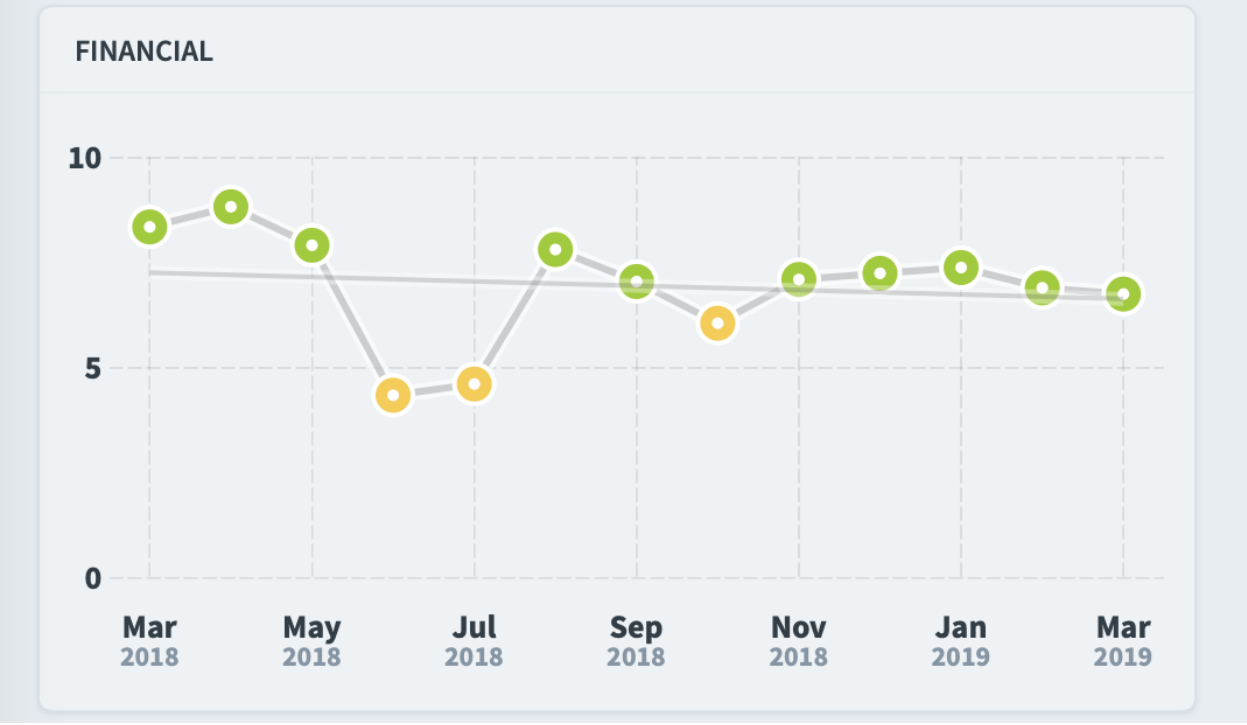
Some people confused this trend line icon with a negative sign, though, so in version 3.3 the trend icon is now an arrow that points the actual direction that the trend is heading.

Easier to see trend lines

Trend lines are easier to see than in previous versions of the software when only one series is being graphed. This is what they looked like before.

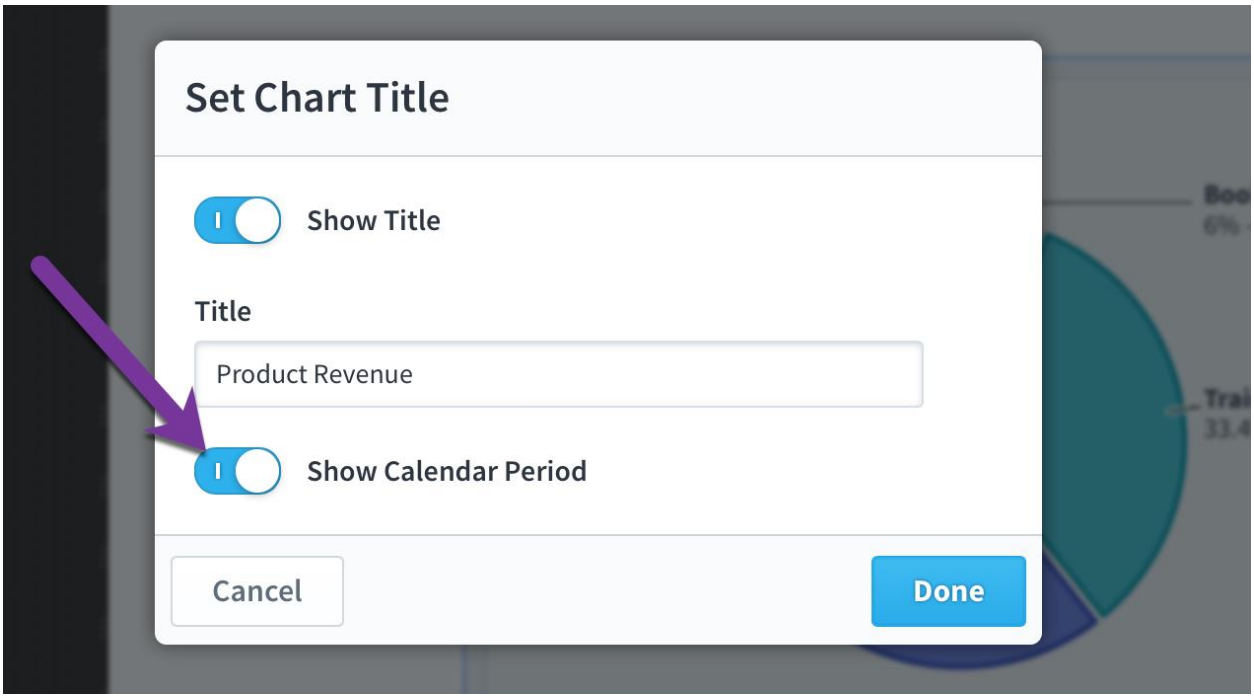


And this is what they look like now.

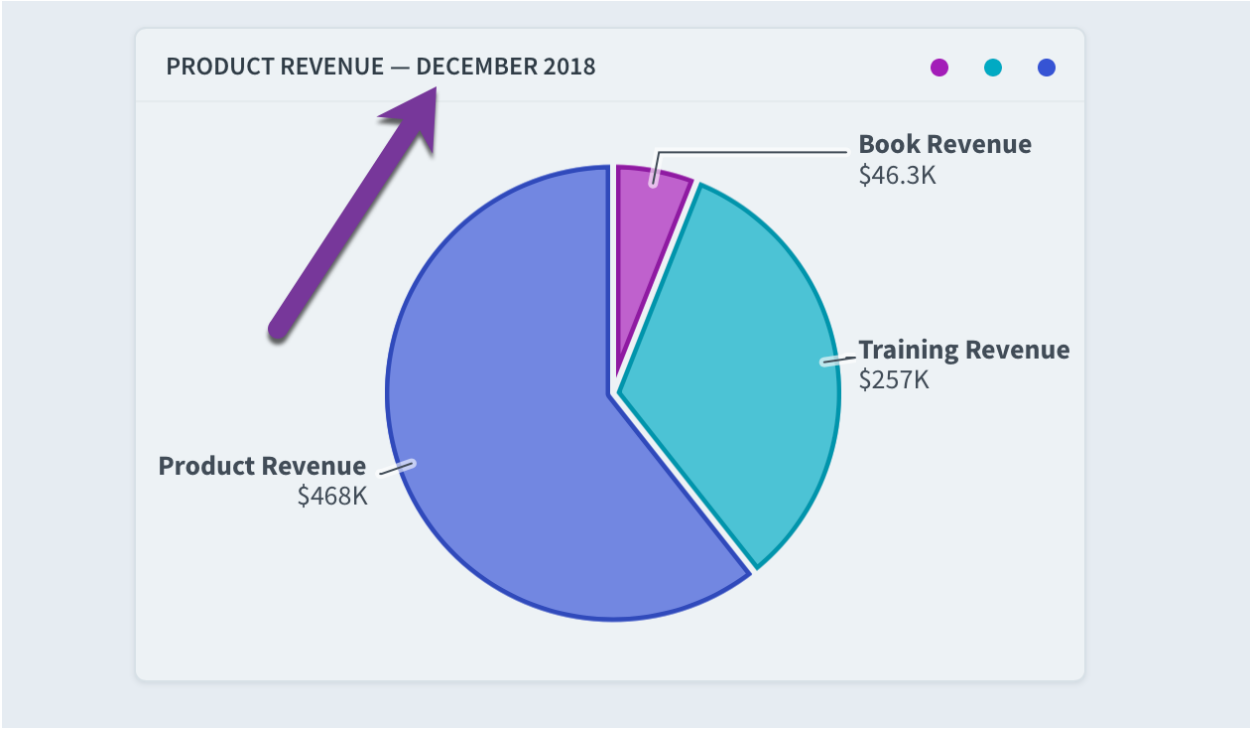


Showing calendar period in chart titles

You can now choose to show the calendar period name as part of a chart's title when the chart is only showing one calendar period.

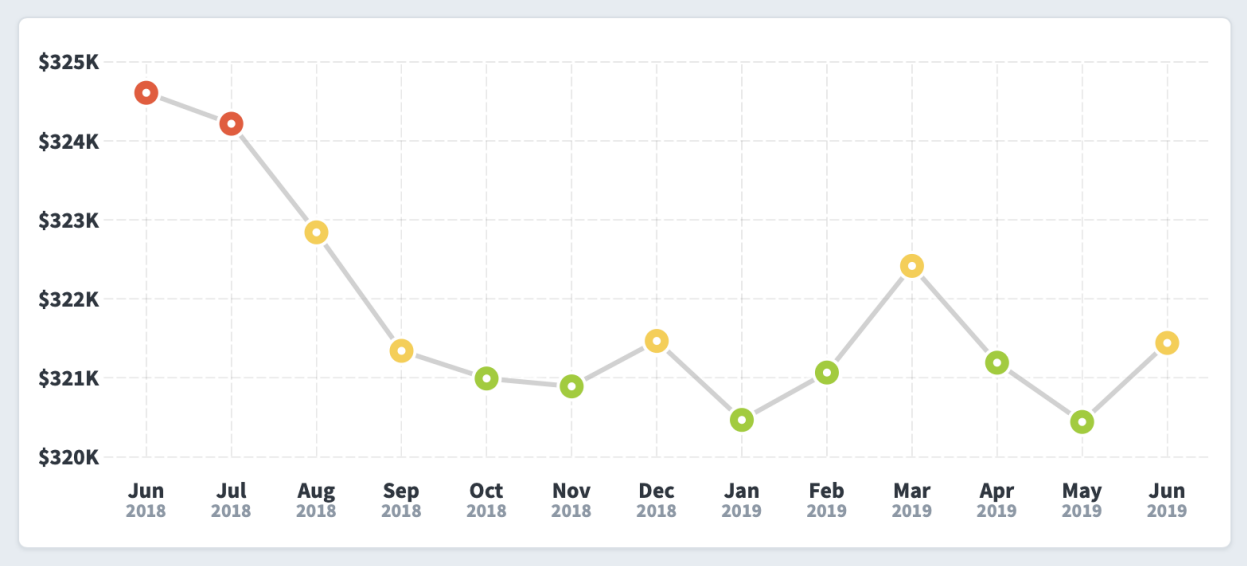


This is very helpful for labeling pie charts that show performance from previous periods.

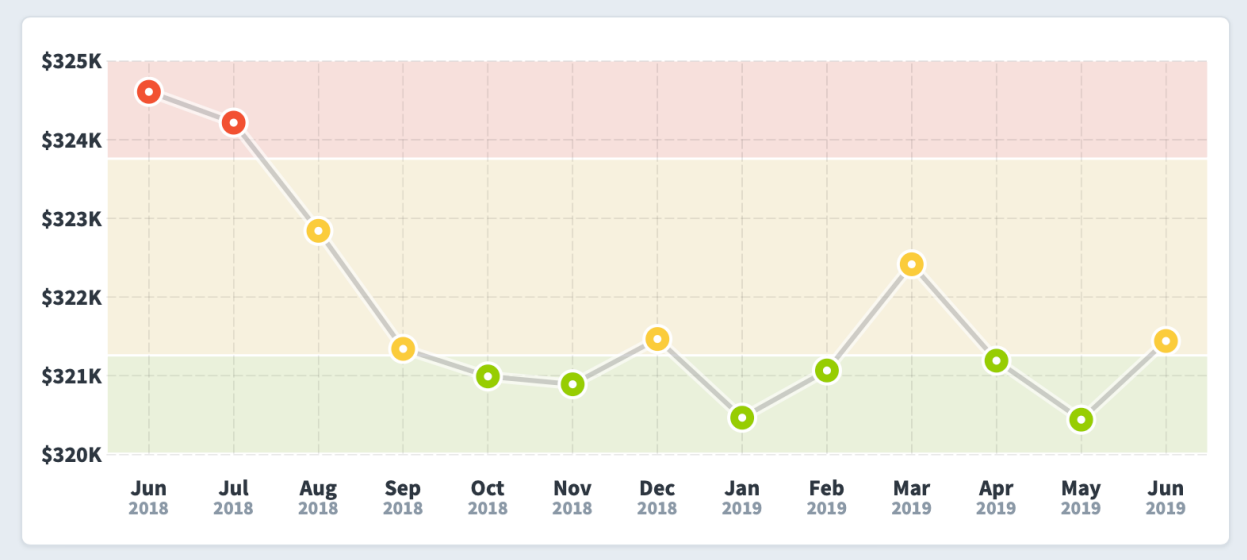


New chart background threshold appearance

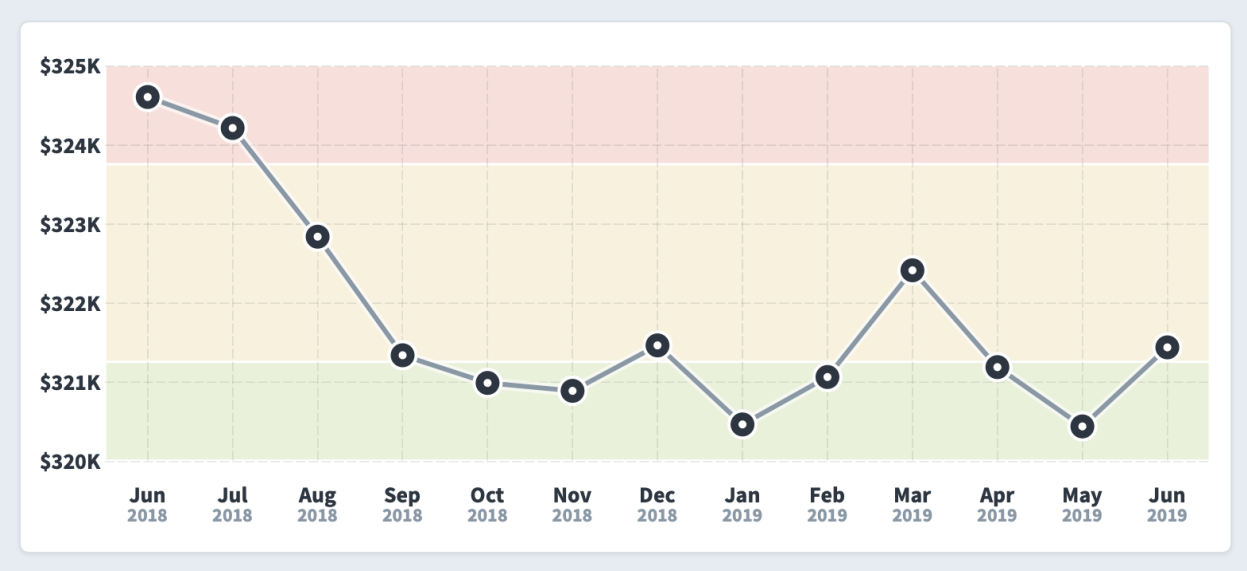
The default chart appearance in Scoreboard shows performance colors with no background color.



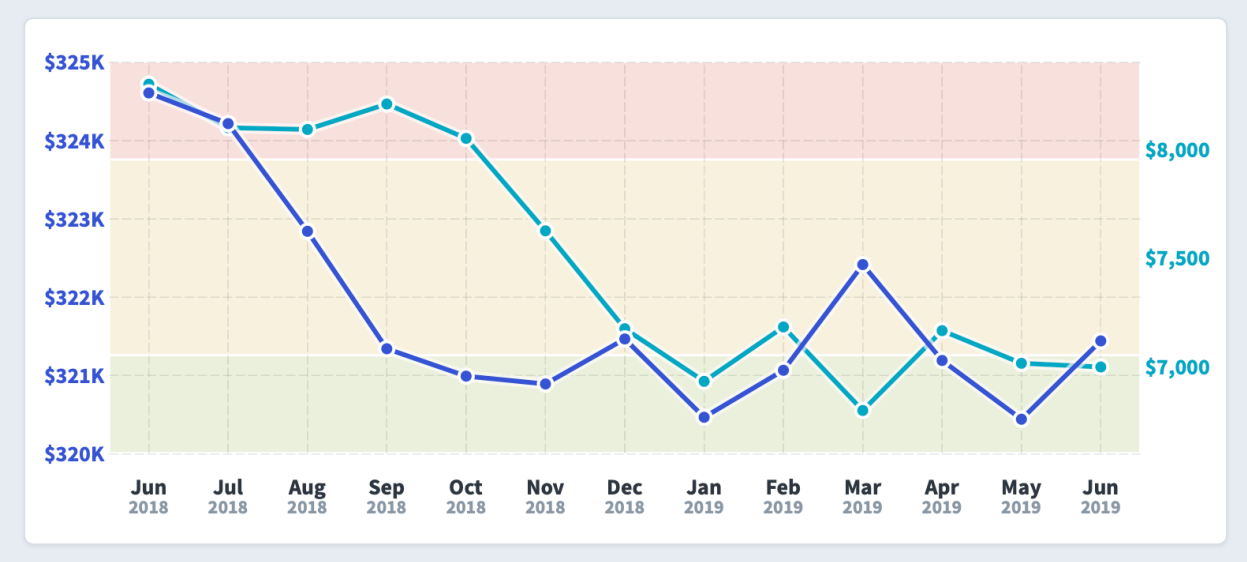
You can choose to turn on background thresholds, however, and this is how it looked in previous versions of the software.



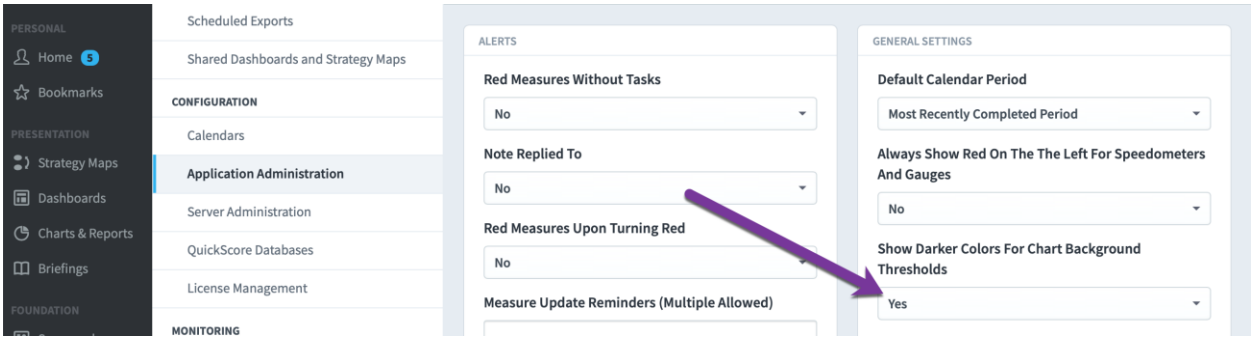
In version 3.3, charts with background colors now have a black line. This makes the chart much easier to read because the points on the line no longer blend in with the background.



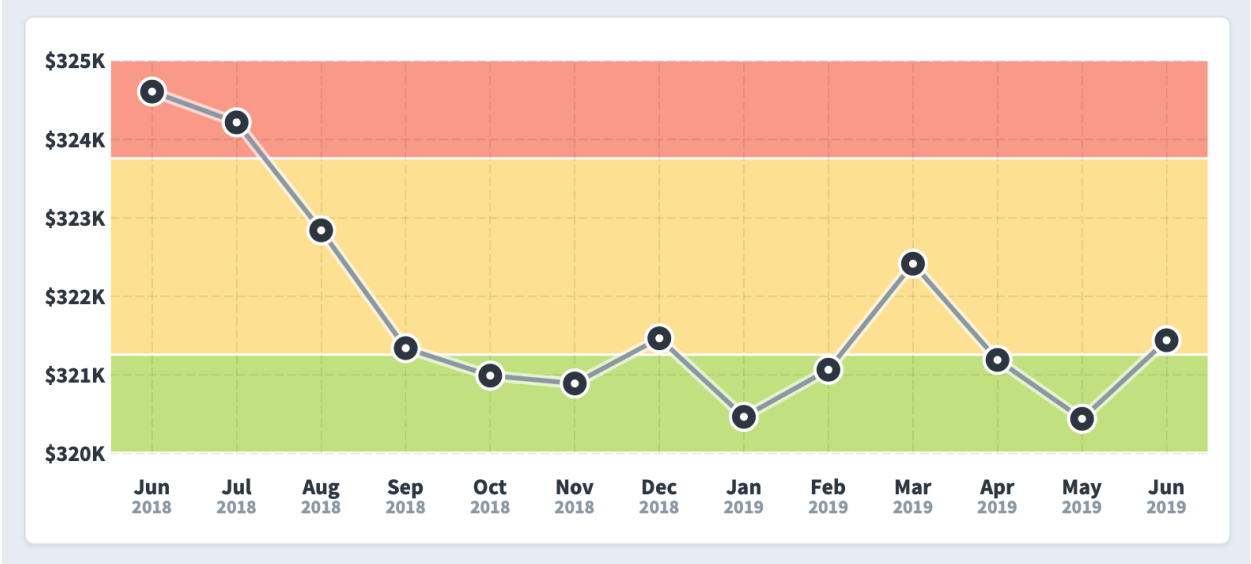
When there are multiple lines, each line is differentiated by color, but the line points are no longer colored to show performance.

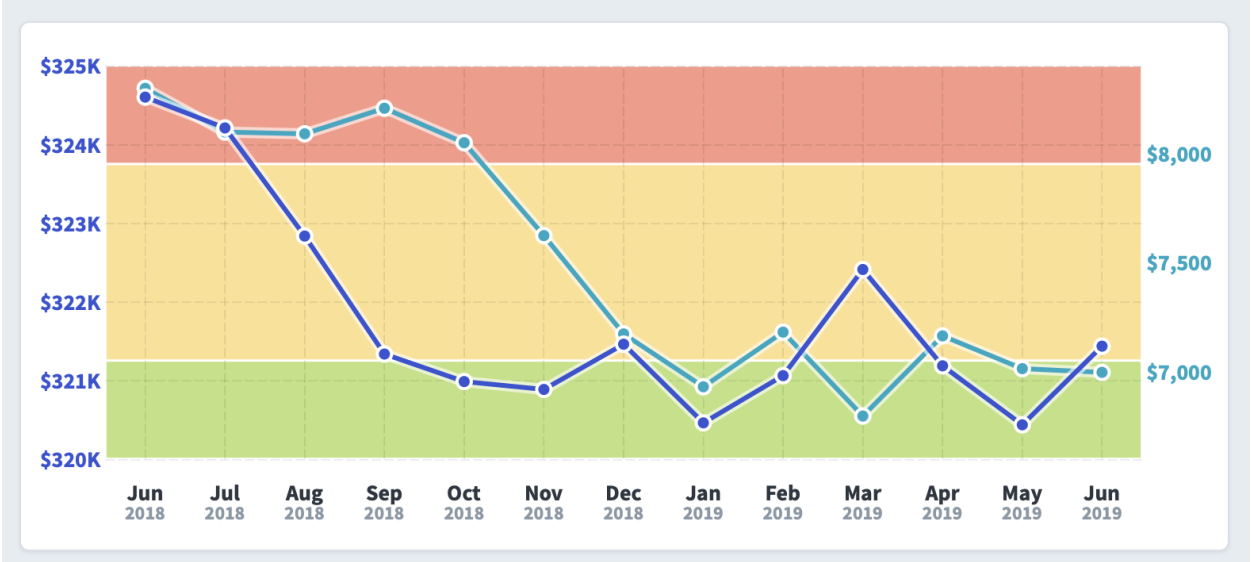


Finally, there is a new Application Administration option to show darker colors for chart background thresholds.



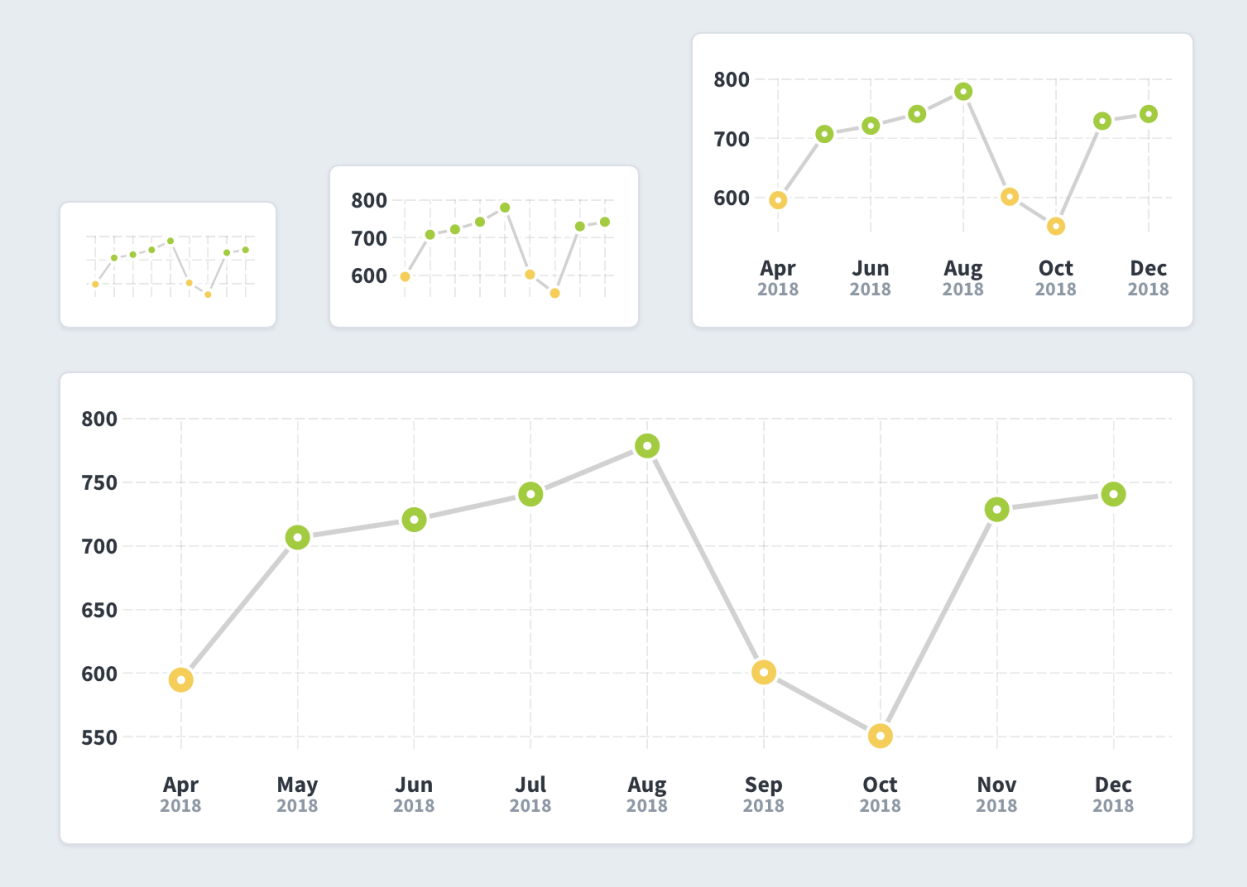
When this is enabled, background thresholds will still default to off. When background thresholds are shown, though, they appear much darker. This can improve visibility on displays like protection screens.





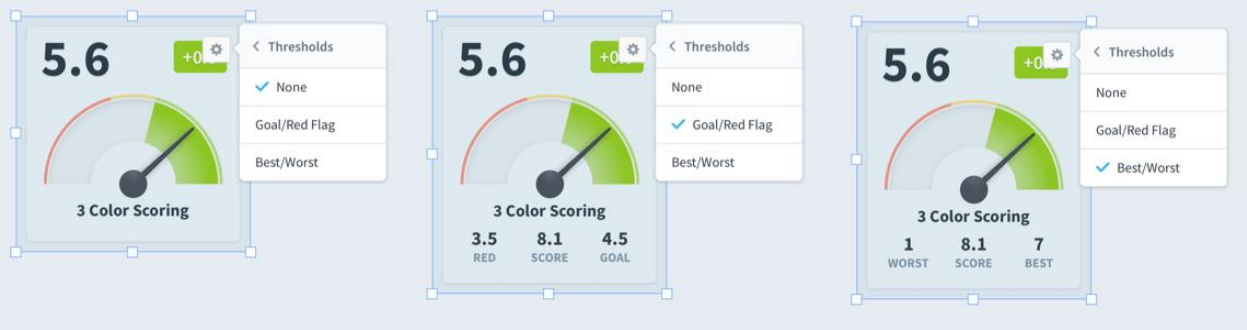
Dynamic line sizing in charts

The line thickness and point sizes now automatically change based on the size of the chart and the amount of data being graphed.



Choosing speedometer thresholds

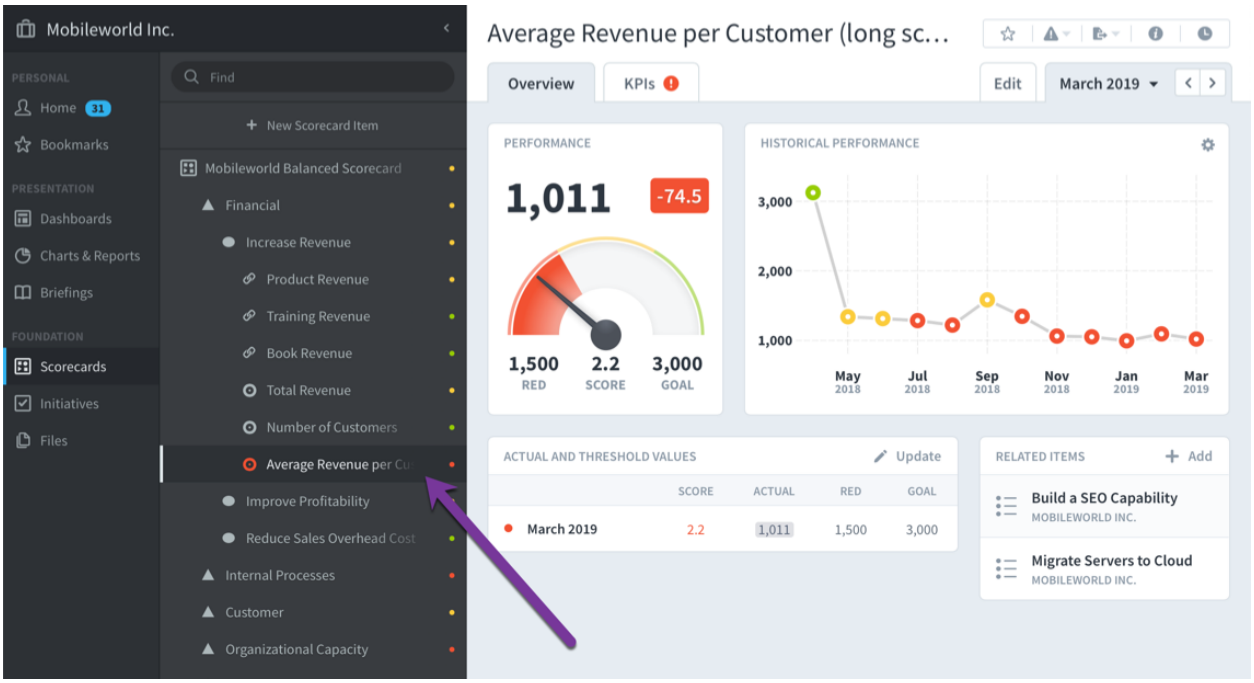
There are some types of KPIs like 3-color scoring that have too many thresholds to display all of them on the speedometer. In these situations, you can now choose to display goal/red flag or best/worst.



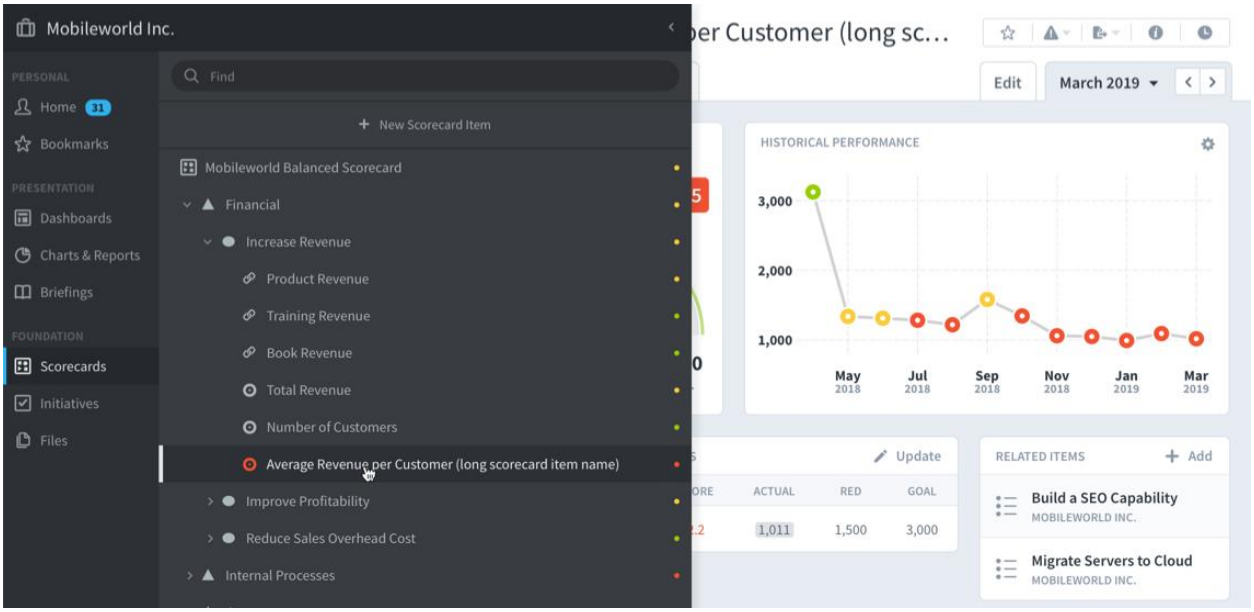
General Usability

Longer tree items are easier to read

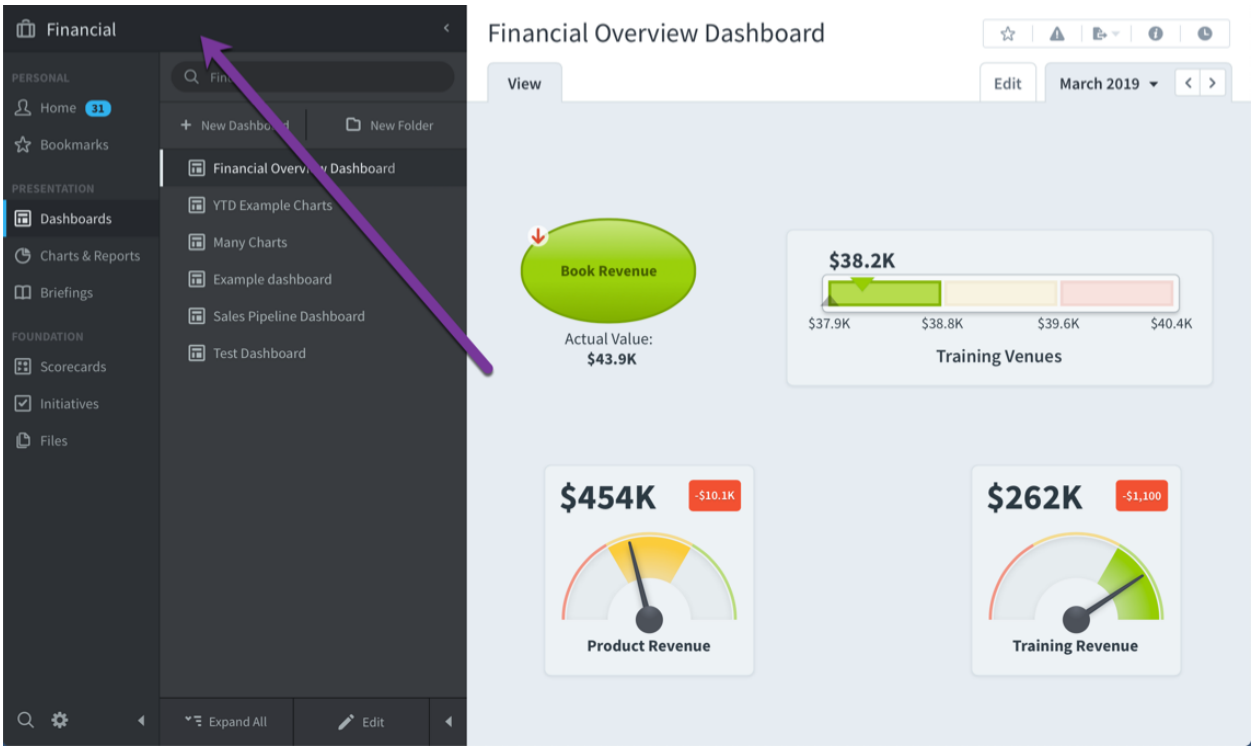
Scoreboard fades out items that don't fully fit in the navigation pane.



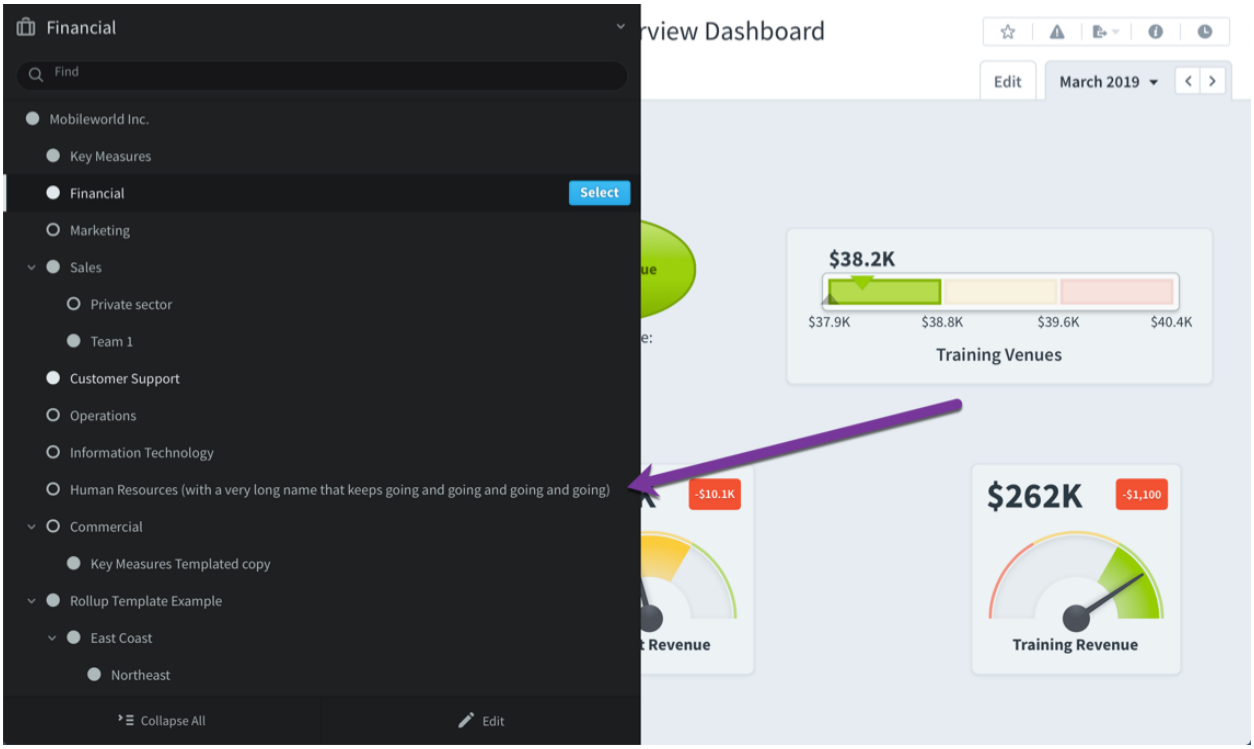
When you hover your mouse cursor over these items in version 3.3, the display pane now slides out to fully show every item in the tree. The navigation pane also remains expanded until you move your mouse away from the pane.



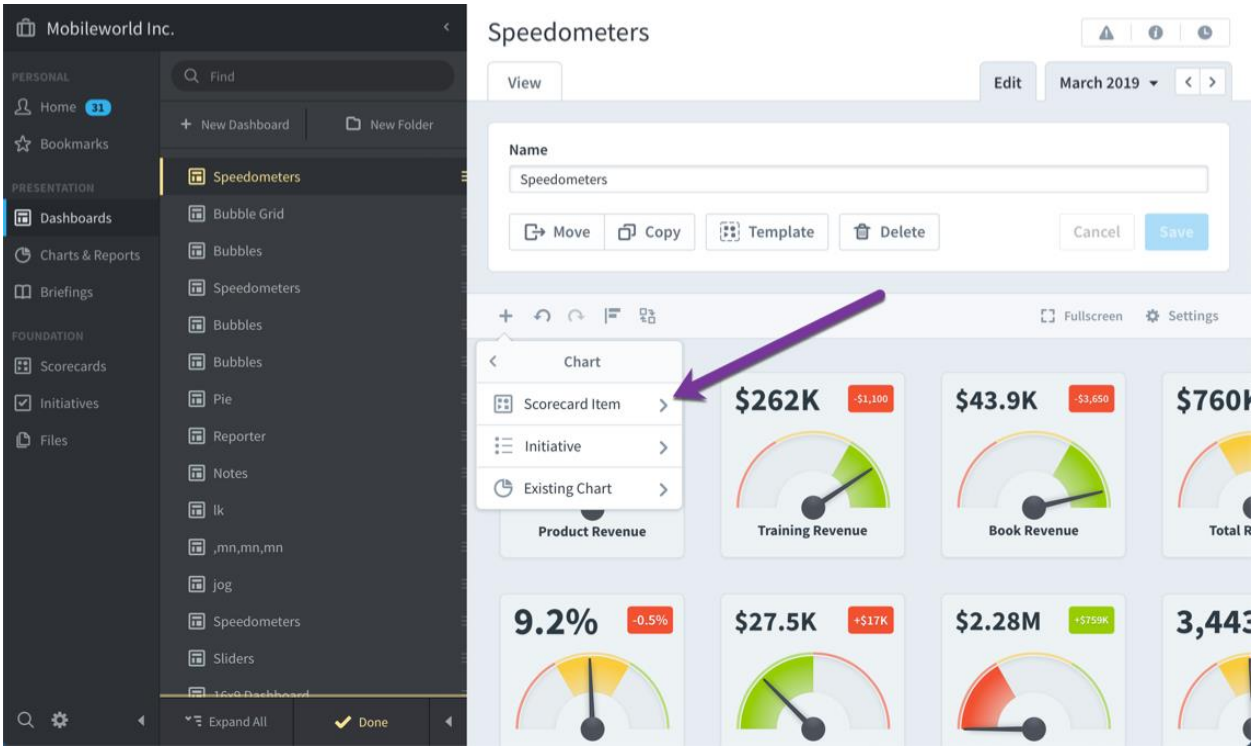
The organization pane behaves similarly too.



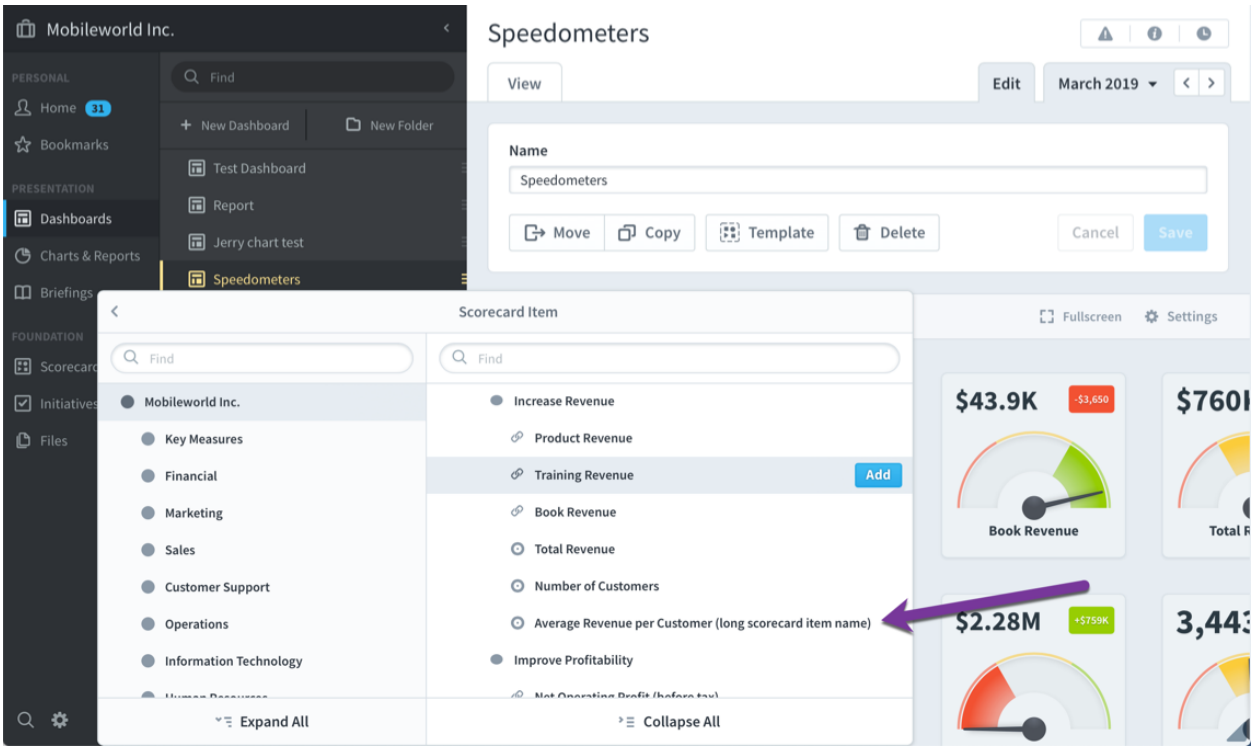
It now automatically expands in width to show all items.



Here's the dashboard Add Widget menu.

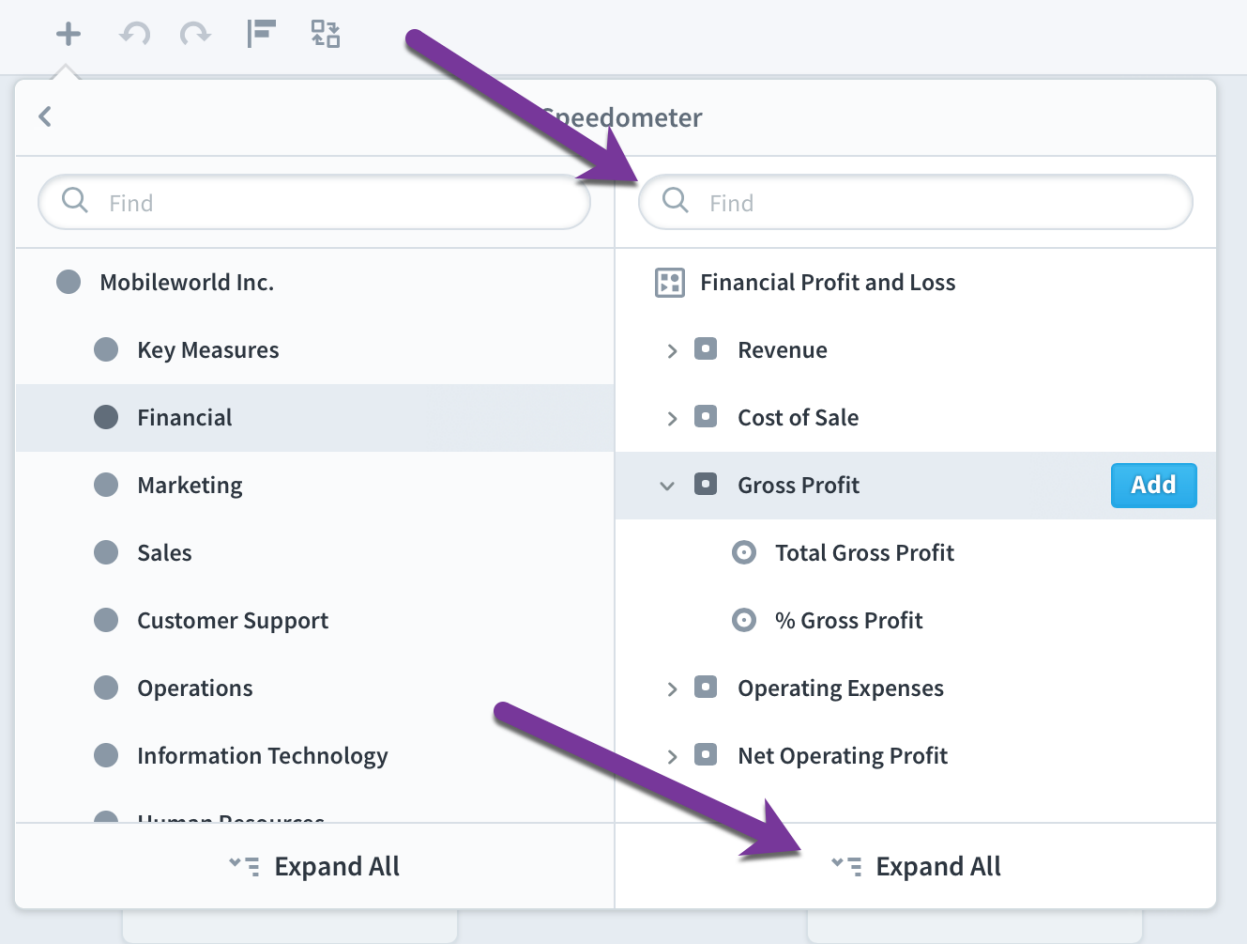


In this example the entire menu gets wider and moves upwards and to the left to show the longer tree items.



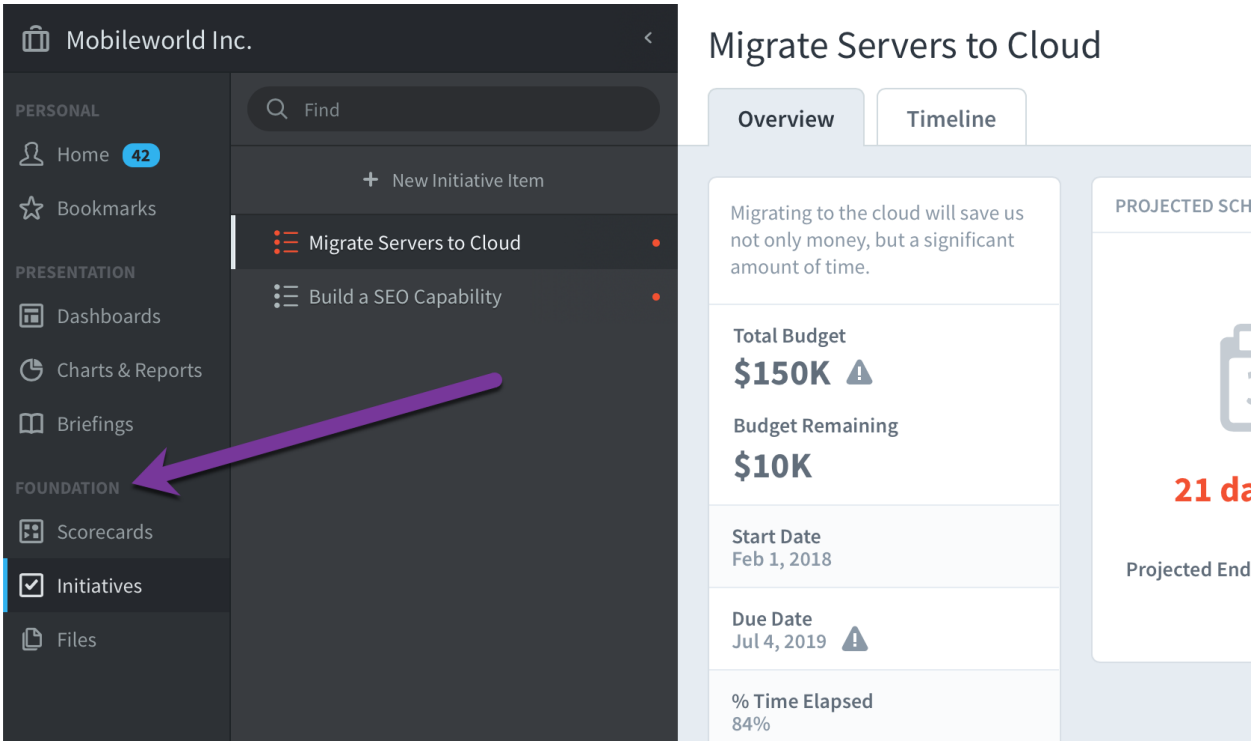
Search and expand/collapse in all trees

All trees in version 3.3 now have search boxes on the top, and expand/collapse buttons on the bottom.



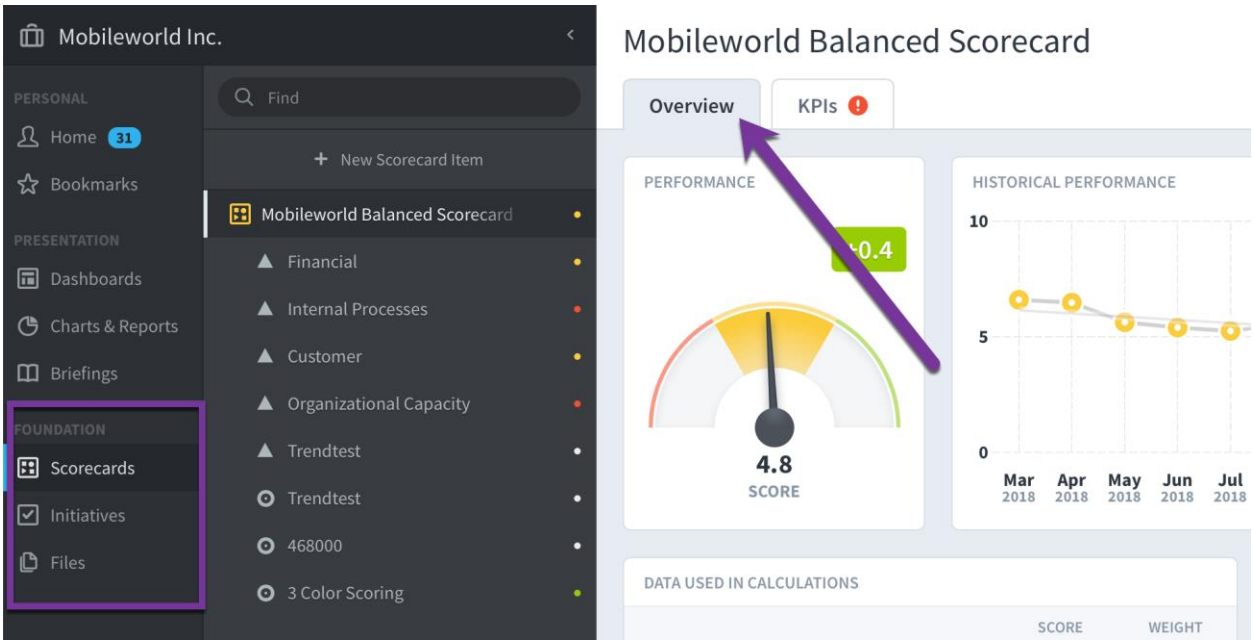
Data category renamed to Foundation

The section that was formerly called Data is now called Foundation. This is a better description of what Scorecards, Initiatives, and Files actually represent in Scoreboard. The entire app has data, but only those three sections contain the low-level building blocks on which all other visualizations are built.



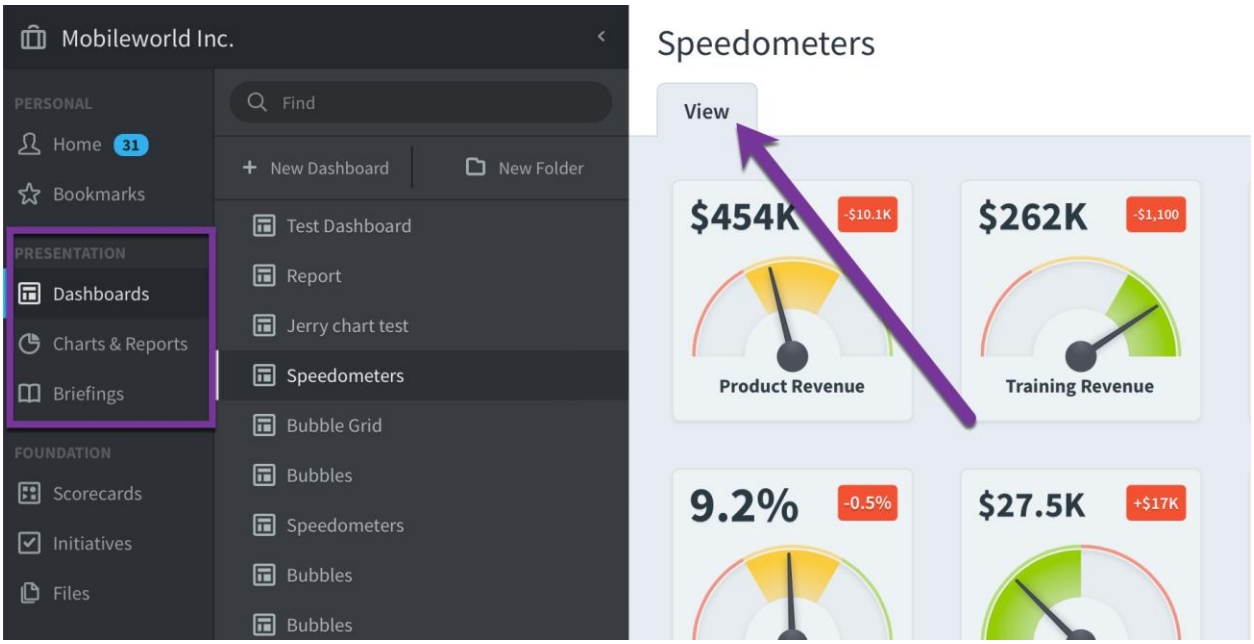
New names for some Overview tabs

The three Foundation sections in Scoreboard are Scorecards, Initiatives, and Files. All of them have overview tabs that show a summary of the select item.



This used to be the case for the three Presentation sections, which are Dashboards, Charts & Reports, and Briefings. These overview tabs have been

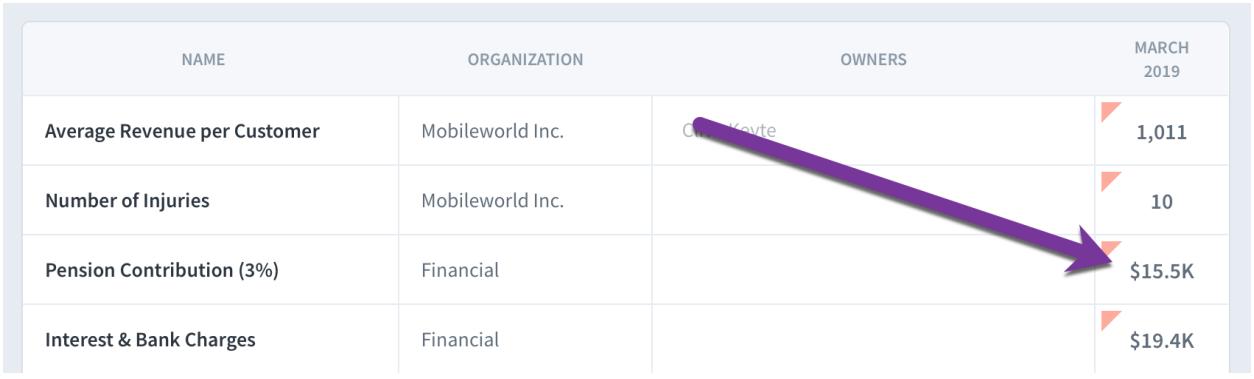
renamed to View in version 3.3, which is a much better description of what the tab does.



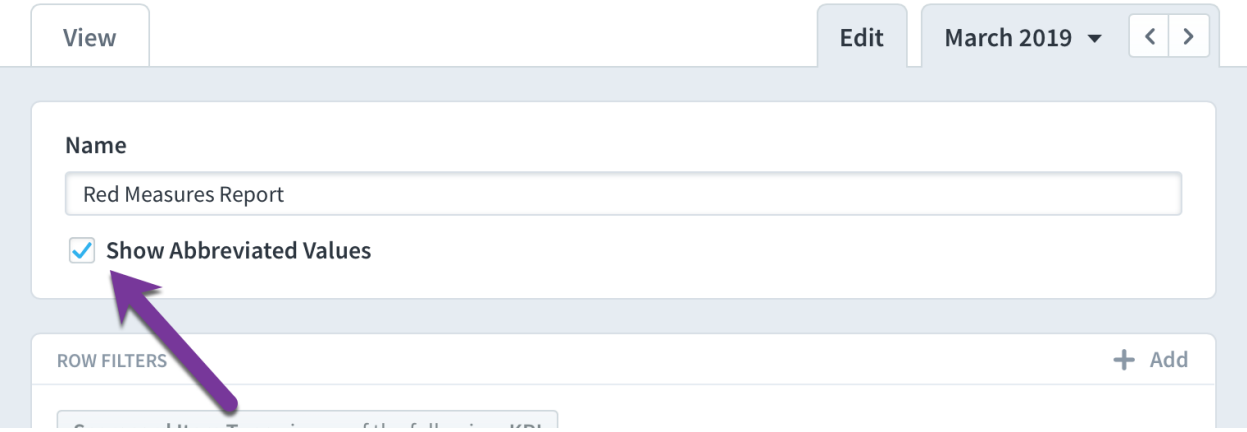
Displaying non-abbreviated numbers

The ability to see abbreviated numbers was added to Scoreboard in a previous release. In version 3.3 there is now a way to see the non-abbreviated version of every number that you see.

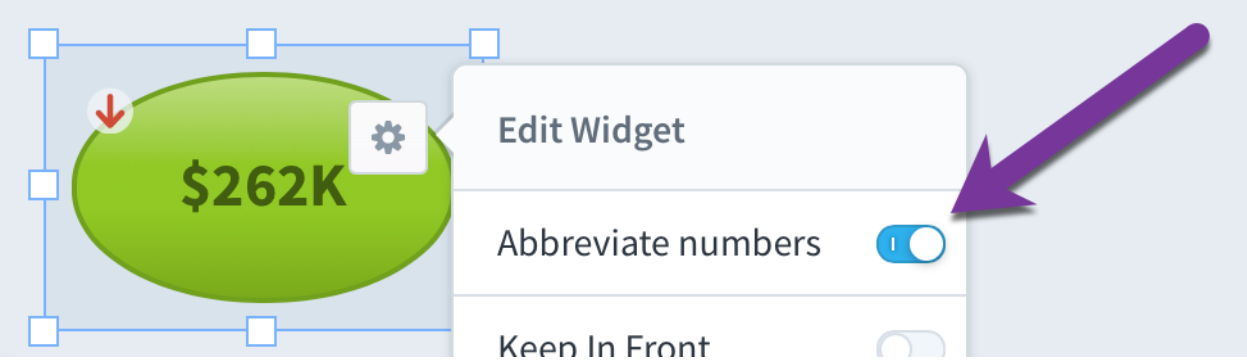
For example, here is an abbreviated number in a report.



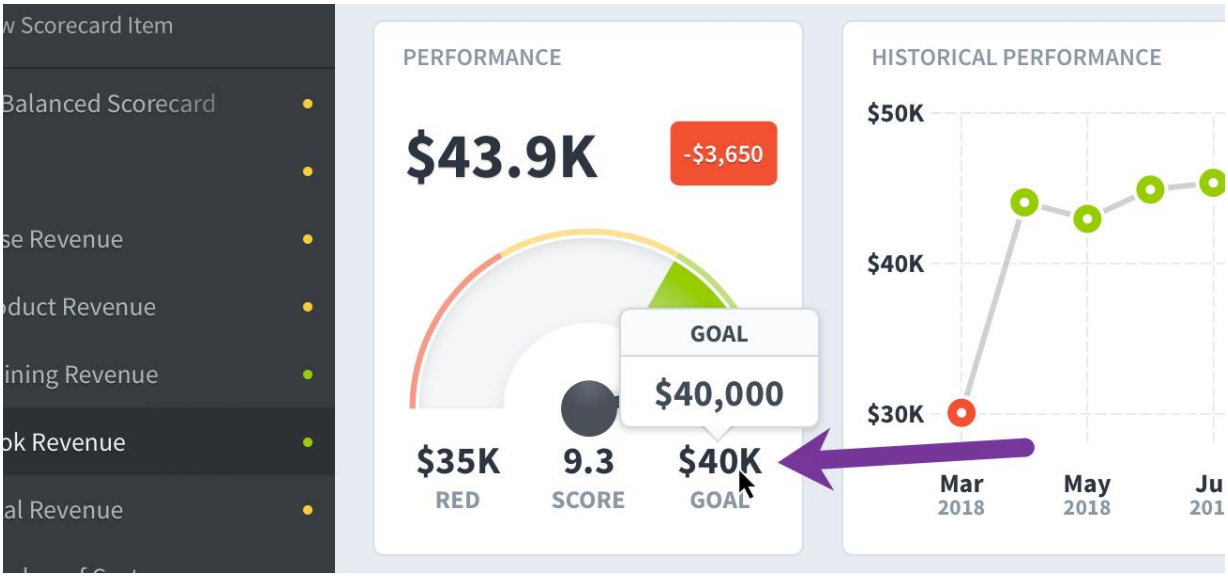
This can now be changed on the edit tab.



Performance bubbles now have a toggle to change the setting.

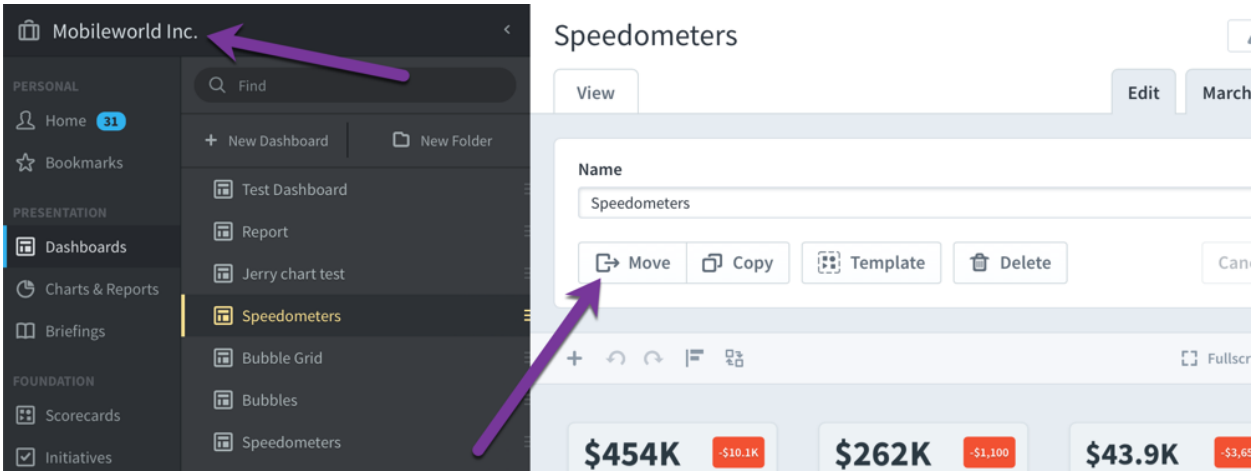


Abbreviated numbers that show on overview tabs now show the full version on hover or tap.

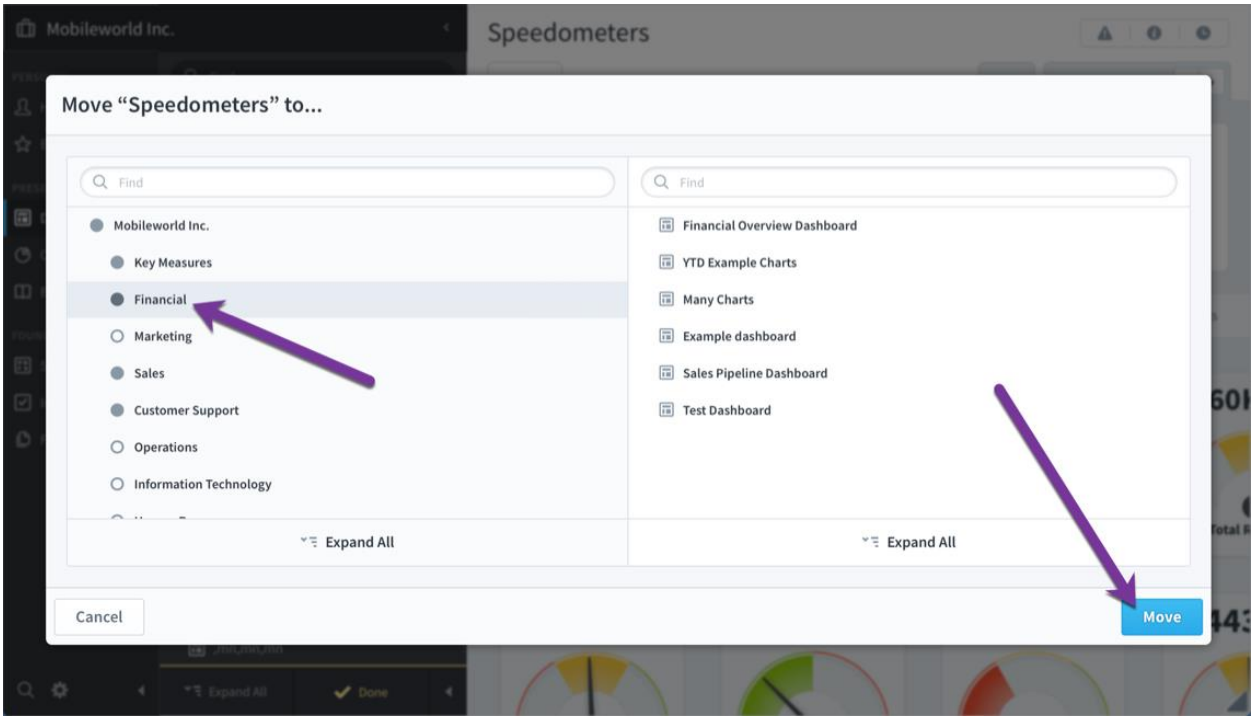


Improved flow for moving items

The flow for moving items has been redesigned in version 3.3. In this example we're moving the Speedometers dashboard in the Mobileworld organization.

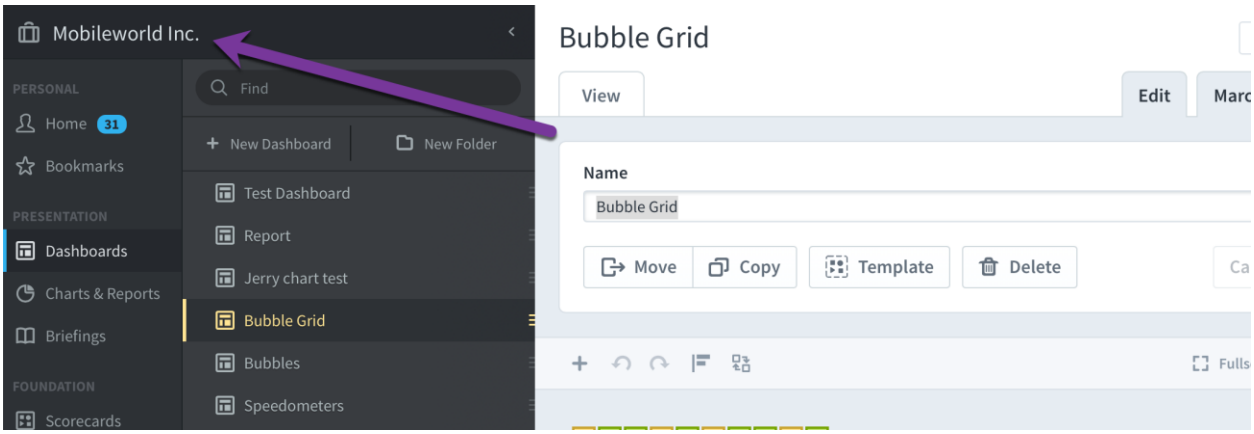


When we click the move button, it displays the move dialog where you choose where you want to move the dashboard to. Here we're choosing the Financial organization.



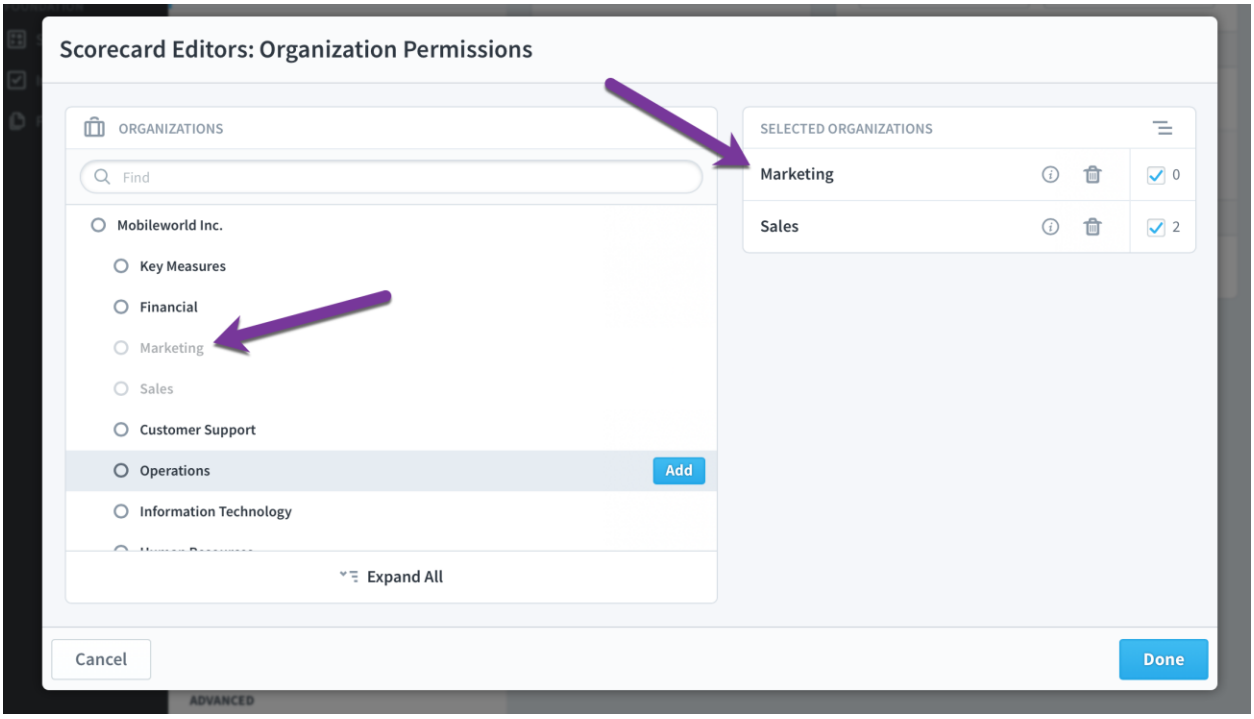
When we click the Move button, the dashboard is moved to the other organization, but you stay in the organization that you were in before with the

next dashboard automatically selected. This new flow allows you to move multiple dashboards out of an organization quickly.



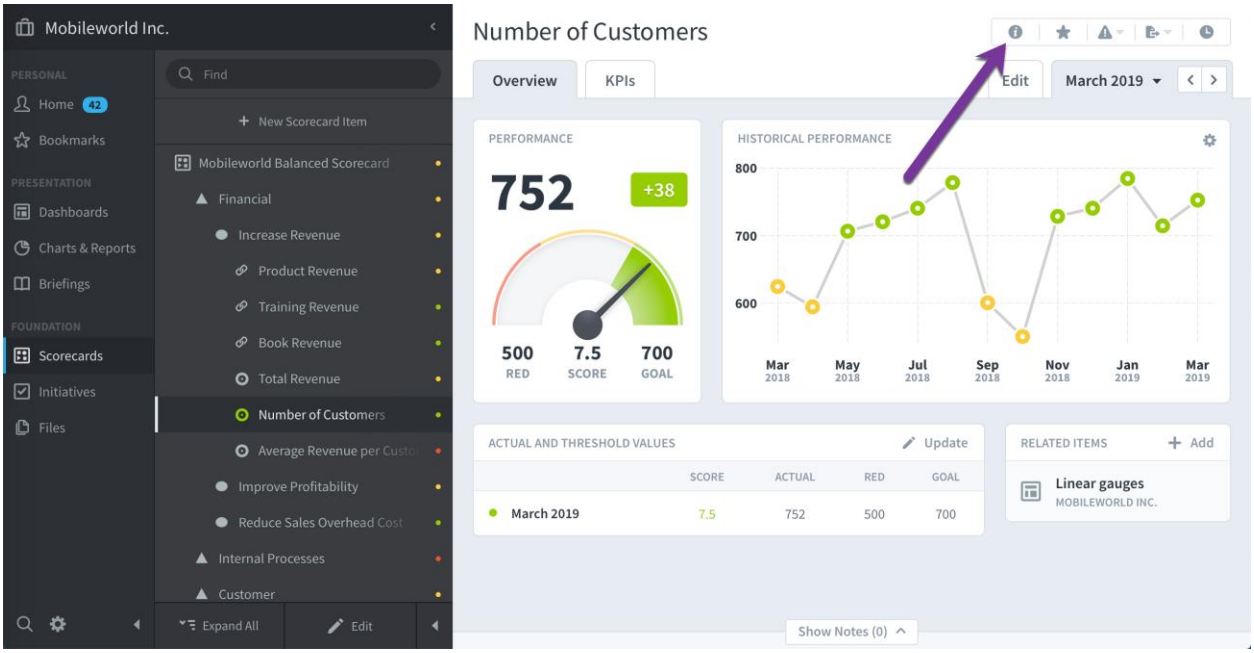
New styling for disabled or used tree items

There is new styling in 3.3 for tree items that are disabled. In this example, it is now clear which organizations have been added to the group permissions list.

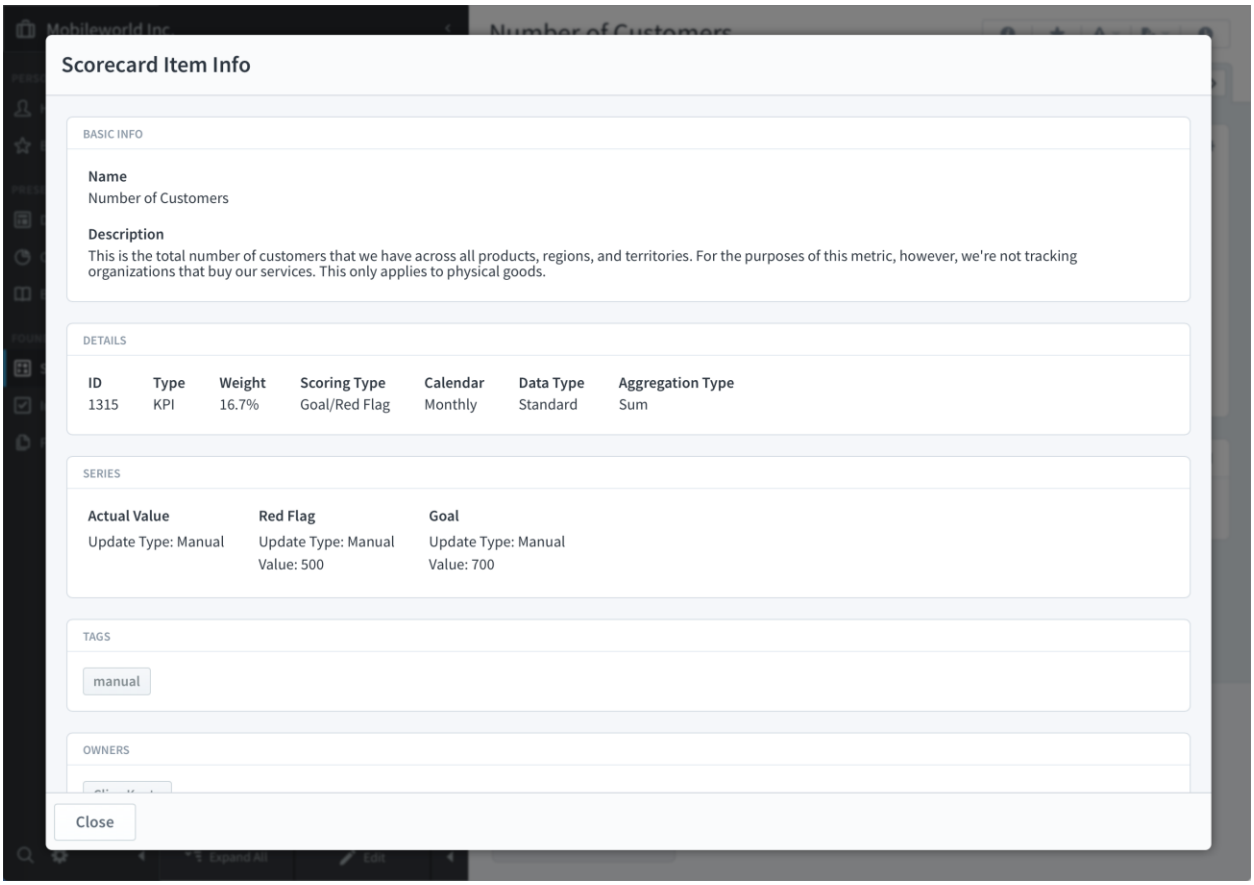


Info button moved to far left

In version 3.3 the info button is now on the left side of the top button row.



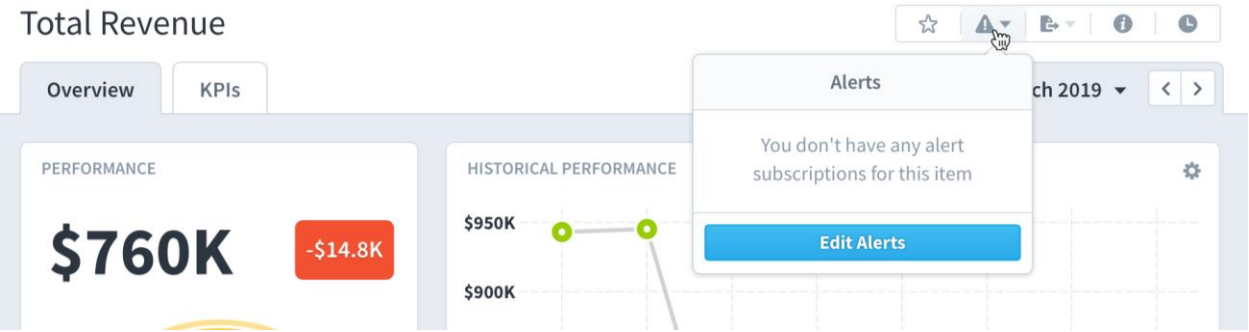
This info dialog contains important information about the selected item, and now the button is much easier to find.



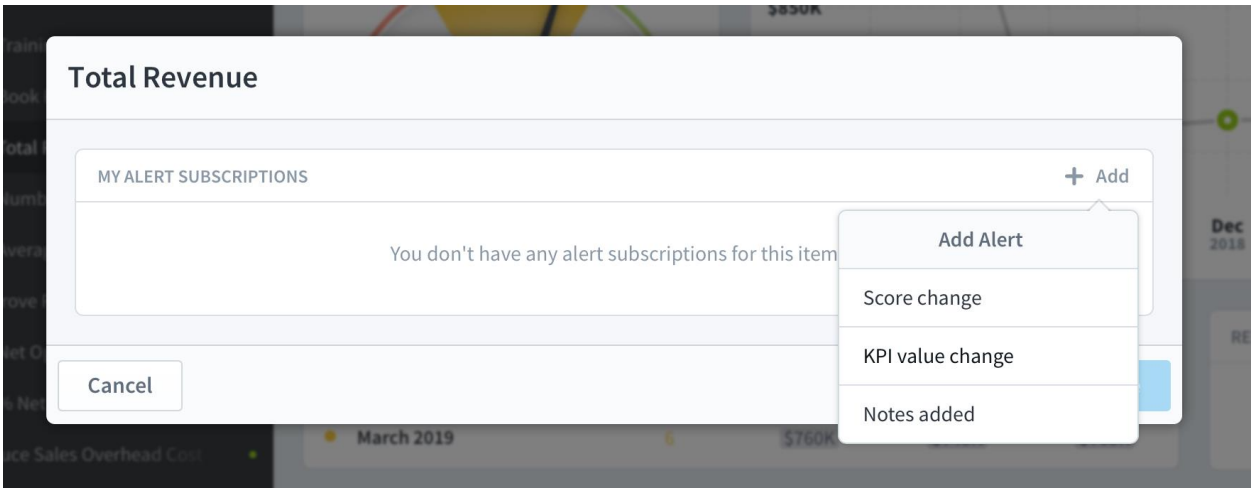
Scorecards

Viewing and editing alerts in Scorecards section

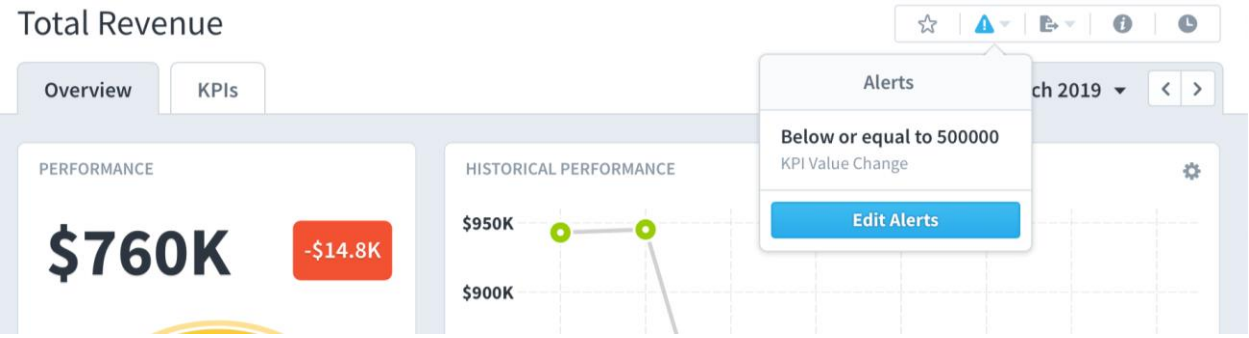
There is now an alerts button in the Scorecards section.



If you click the "edit alerts" button you can add an alert for the currently selected scorecard item.

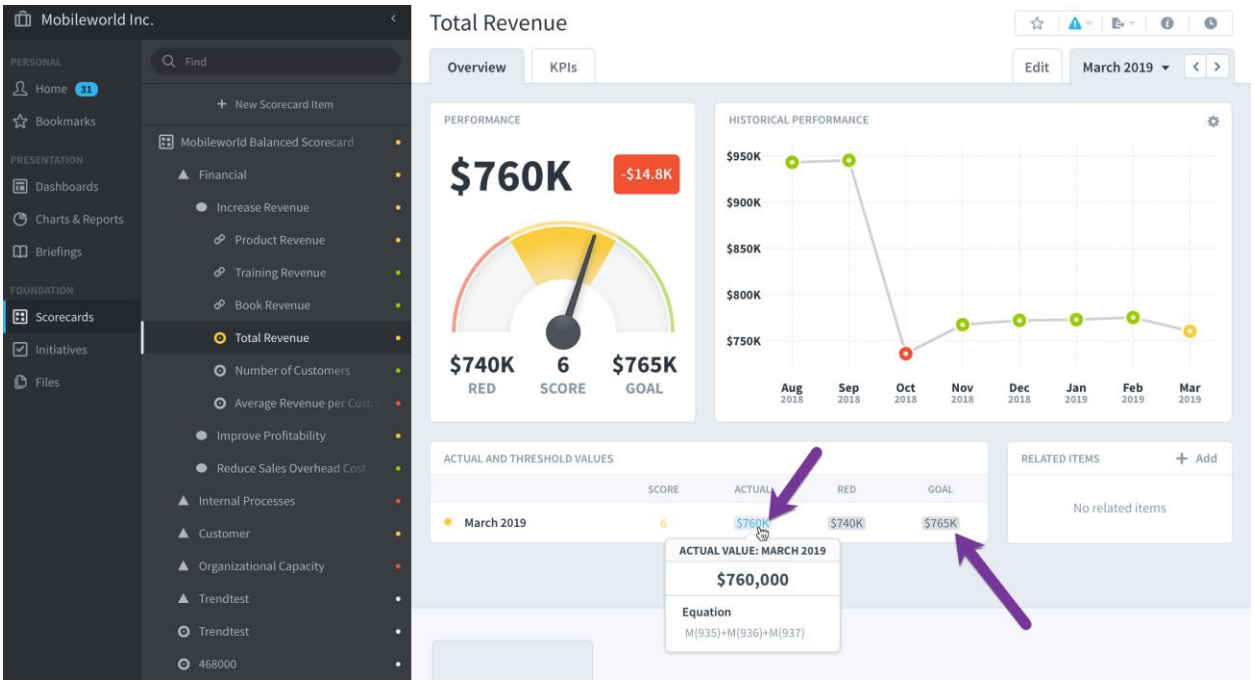


When you have an alert set, the icon now turns blue. This is similar to the bookmark icon turning blue when you have a bookmark for the item.



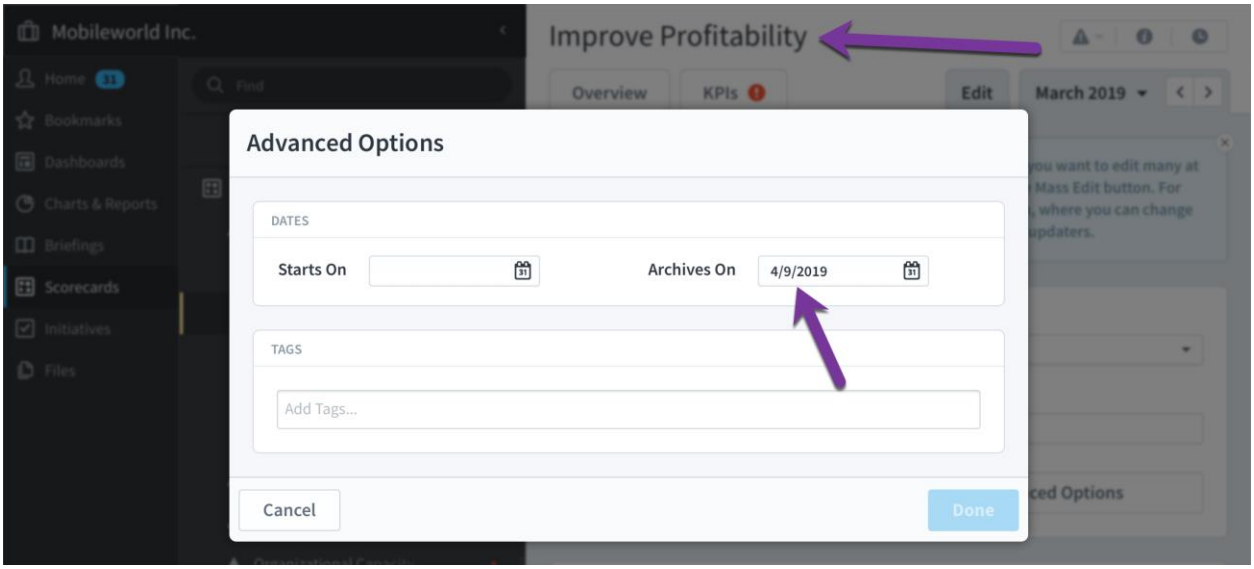
Different appearance for clickable values

When you click on a calculated value in the actual and threshold values table, Scoreboard shows a dialog with information about the equation. In version 3.3 we now style these clickable values differently so it's easy to tell which ones open dialogs.

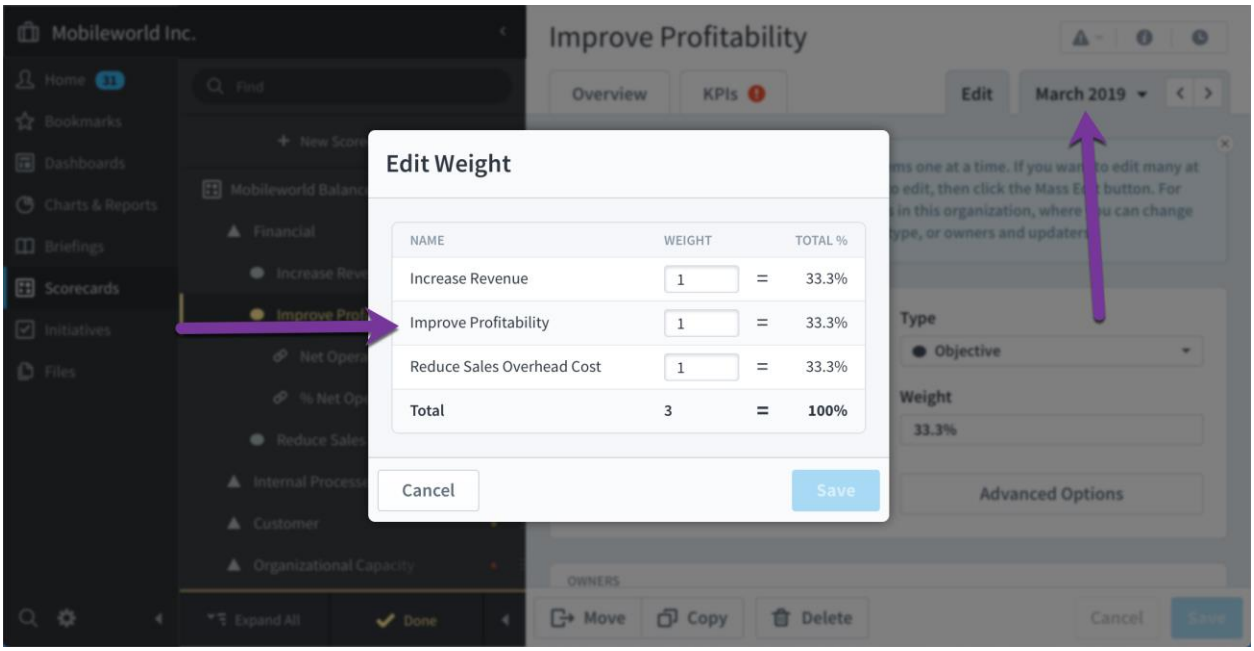


Weighting changes with start and archive dates

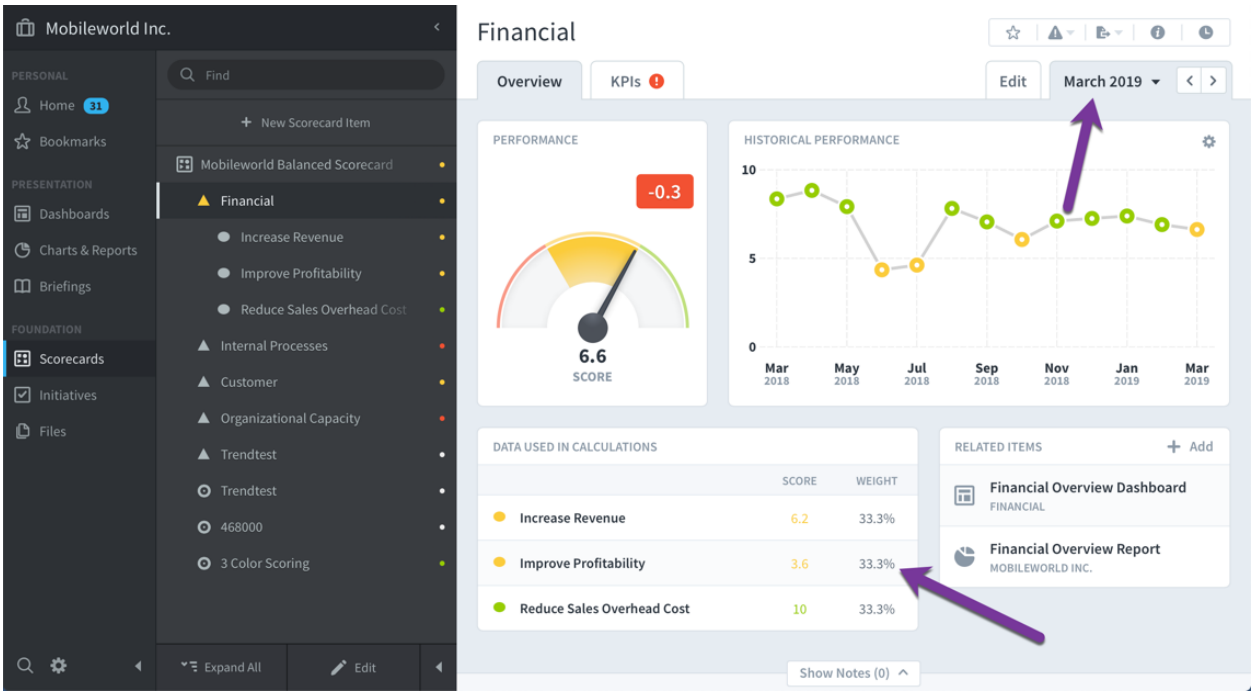
Weighting can now change based on start and archive dates. In this example, "Improve Profitability" archives on April 9th, 2019.



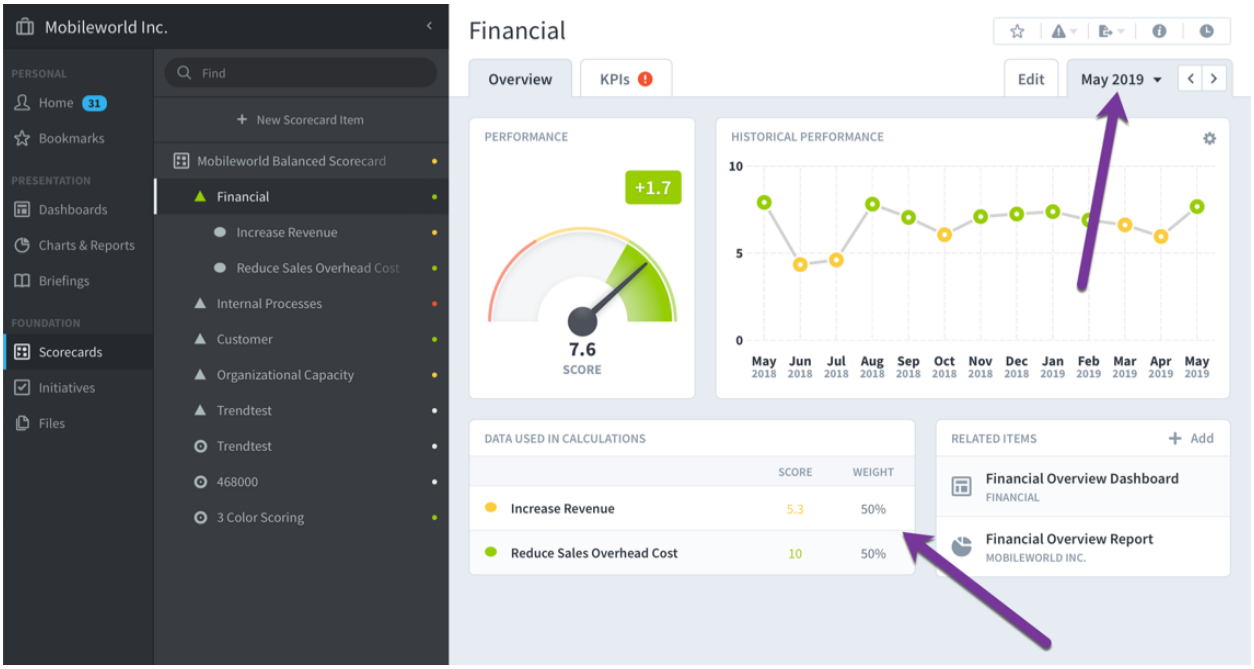
Here we're editing the weighting of "Improve Profitability" and its siblings. All have a relative weighting of 1, which is 33% in March 2019.



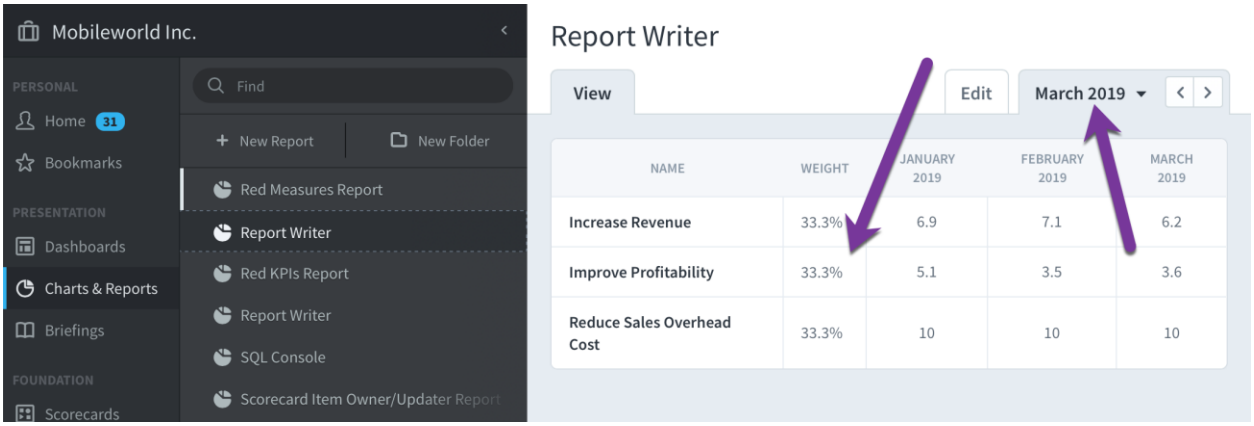
Here's the overview tab showing the same thing.



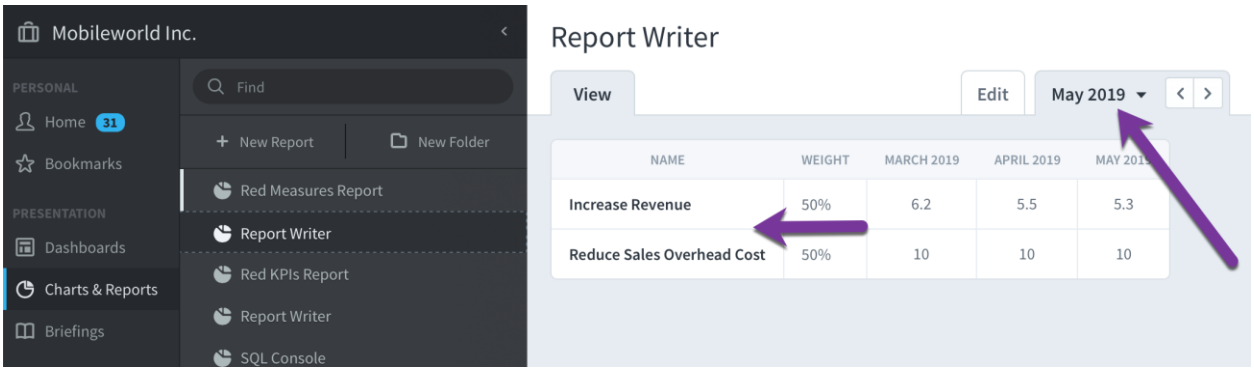
When we change the calendar period selector to May 2019, you can see that "Improve Profitability" disappears, and its siblings are each weighted 50%.



Similarly, when we run a report for March 2019, each of the items have 33% weighting.

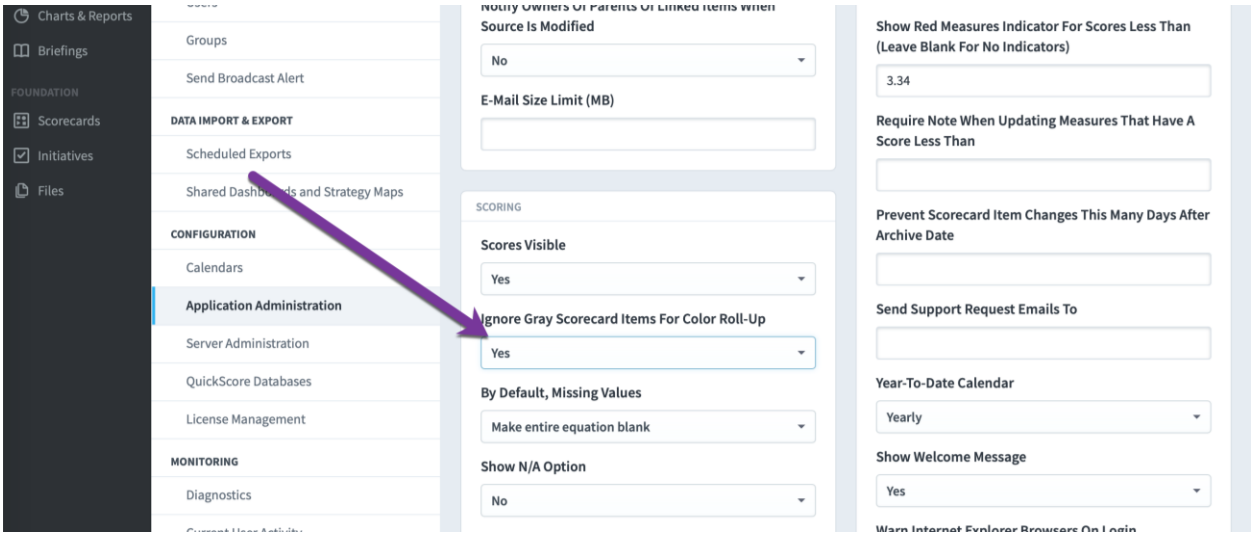


And the same report shows 50% with "Improve Profitability" missing in May.

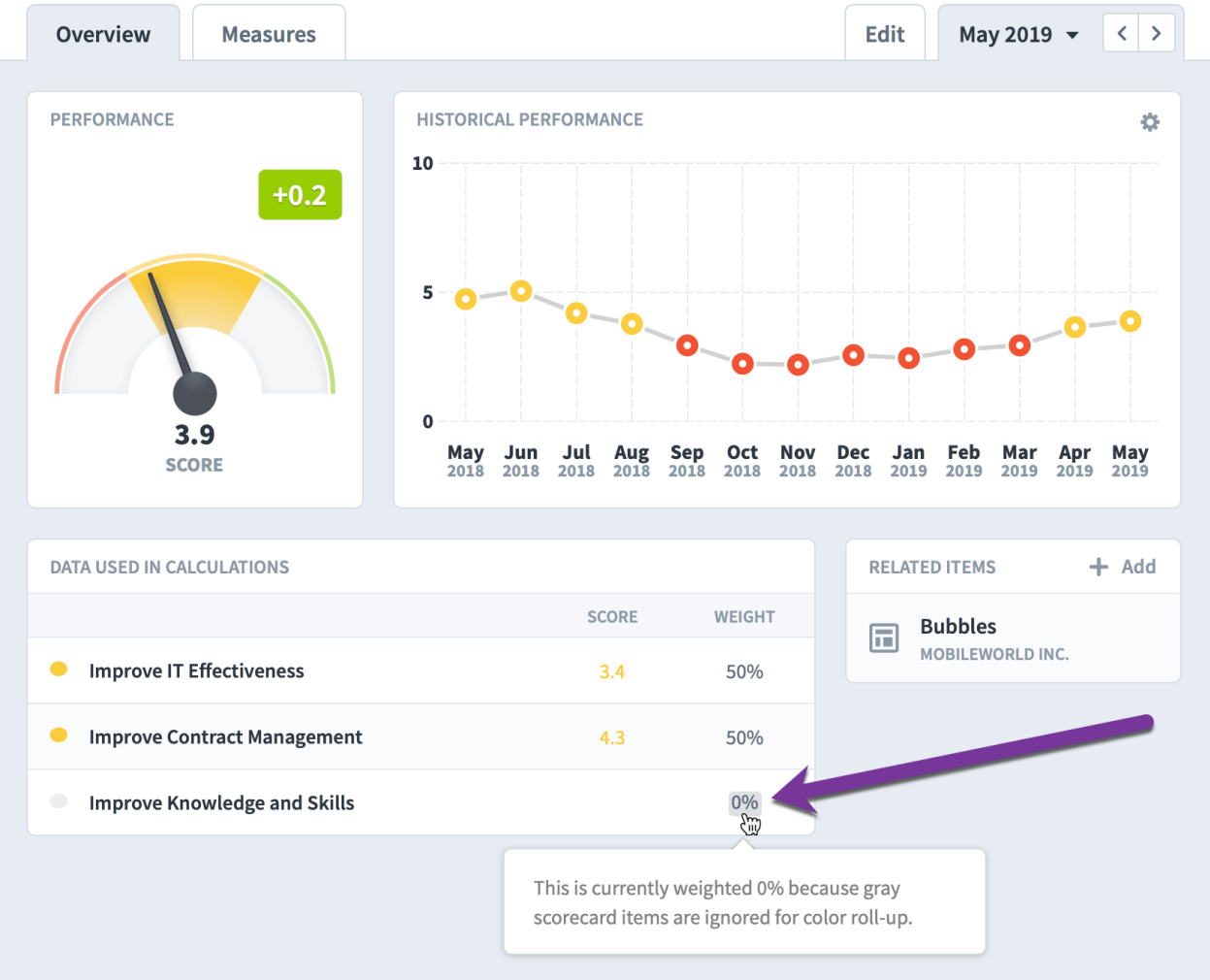


Weighting is 0 for ignored gray scores

There is a setting in Application Administration called “ignore gray scorecard items for color roll-up”. This means that KPIs with missing values will be ignored when rolling scores up the tree.



When this is “Yes,” gray scorecard items now show a weighting of 0 on the Scorecards Overview tab. This accurately reflects how scorecard items factor into the overall score.



New label for update KPI value button

The button that you click to update KPI values is now called “Update” instead of “Edit.”

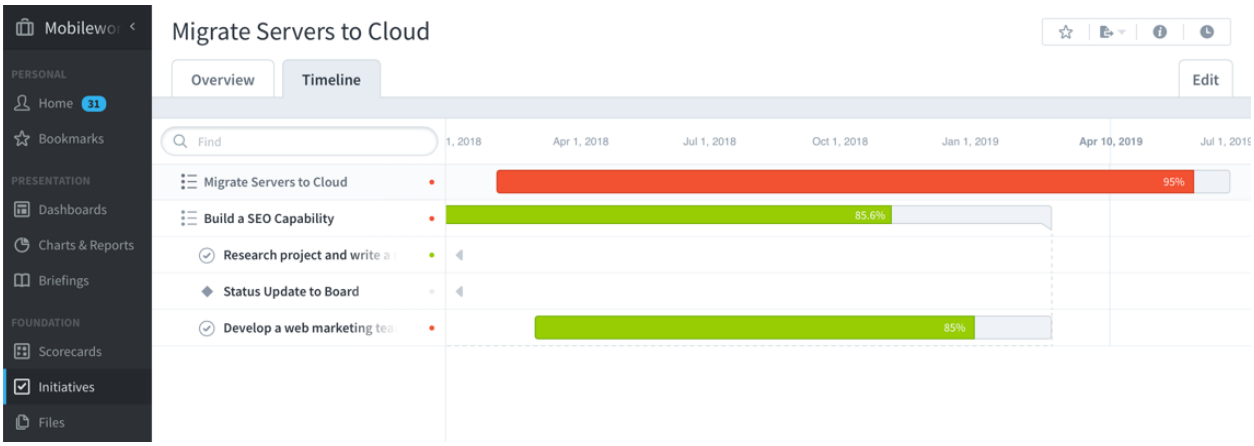
Related items show performance colors

Related item icons are now colored if they have performance colors.

Initiatives

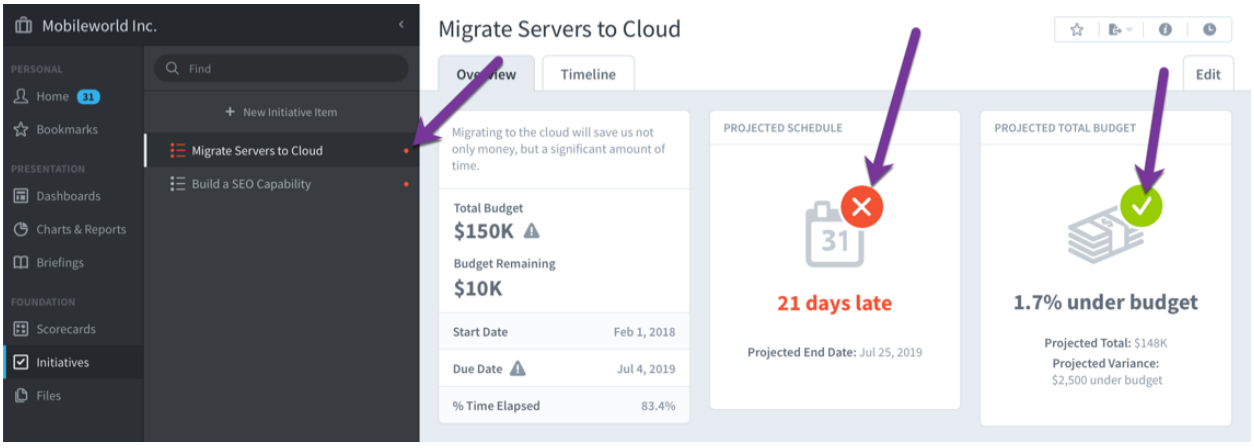
Unified approach to initiative coloring

Version 3.3 introduces a common coloring scheme across the entire Initiatives section. This starts on the Timeline tab, where initiatives that are on-time and under budget are green instead of blue.



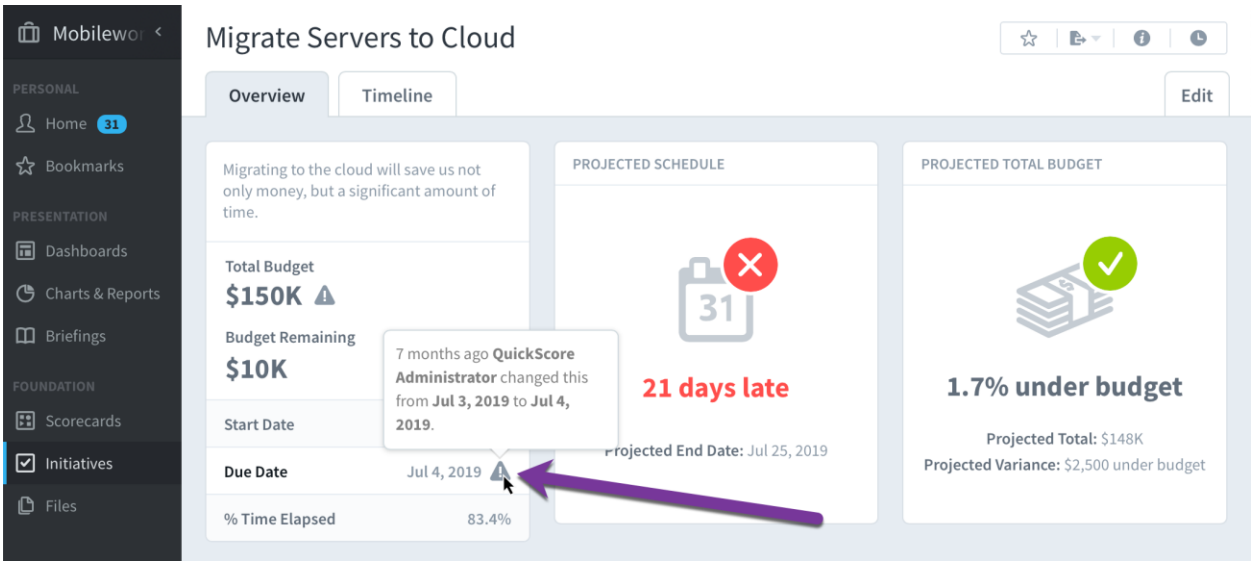
These performance colors are the same on the Overview tab. If no value has ever been entered for Percent Complete of Budget Spent, the initiative item is colored gray. If either Schedule or Budget is red, the item is red. Otherwise it's green.

We've refined our predictive and coloring algorithms to make all of the initiative coloring intuitive, and universal.



New indicators for changed budget or schedule

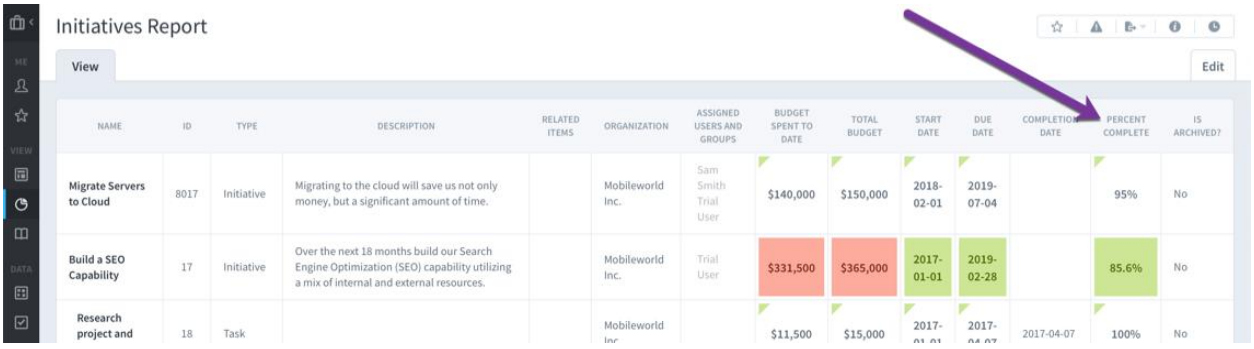
There are now indicators on the Initiatives Overview tab if an item's budget or due date has been modified. Hovering or tapping on the indicator shows a tooltip explaining exactly what happened.



Reports

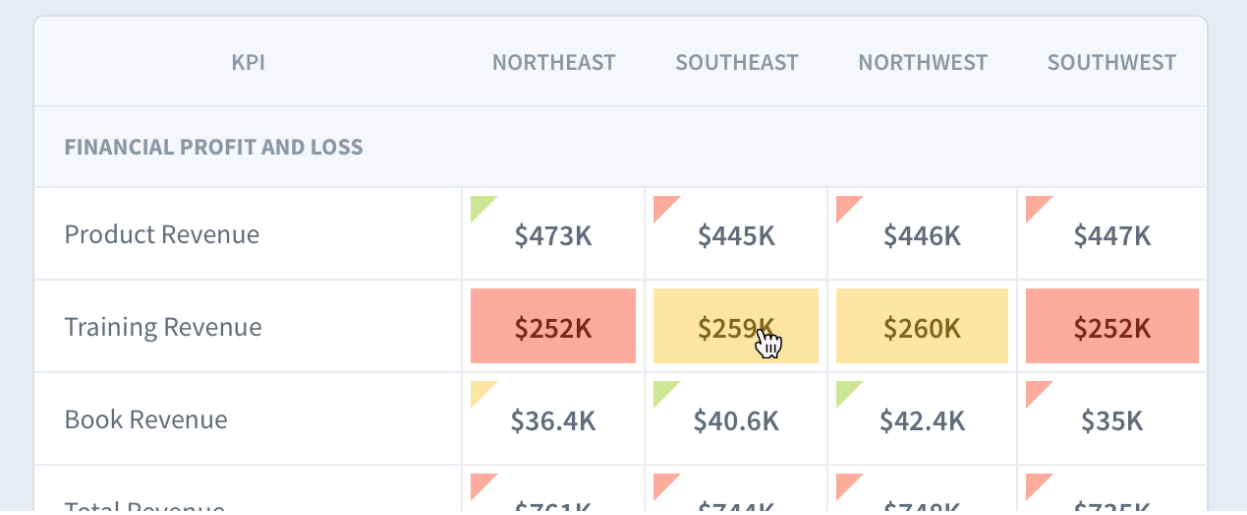
Initiatives report percent complete column

The initiatives report now has a percent complete column.

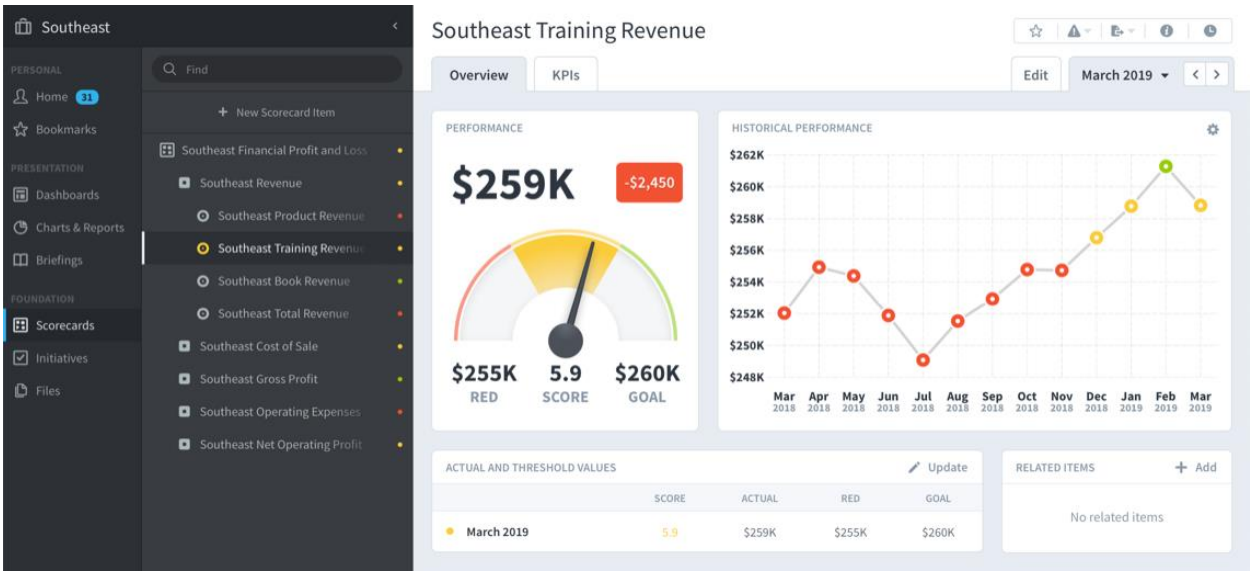


KPI comparison report drilldown links

The KPI comparison report now has drilldown links on every KPI value.

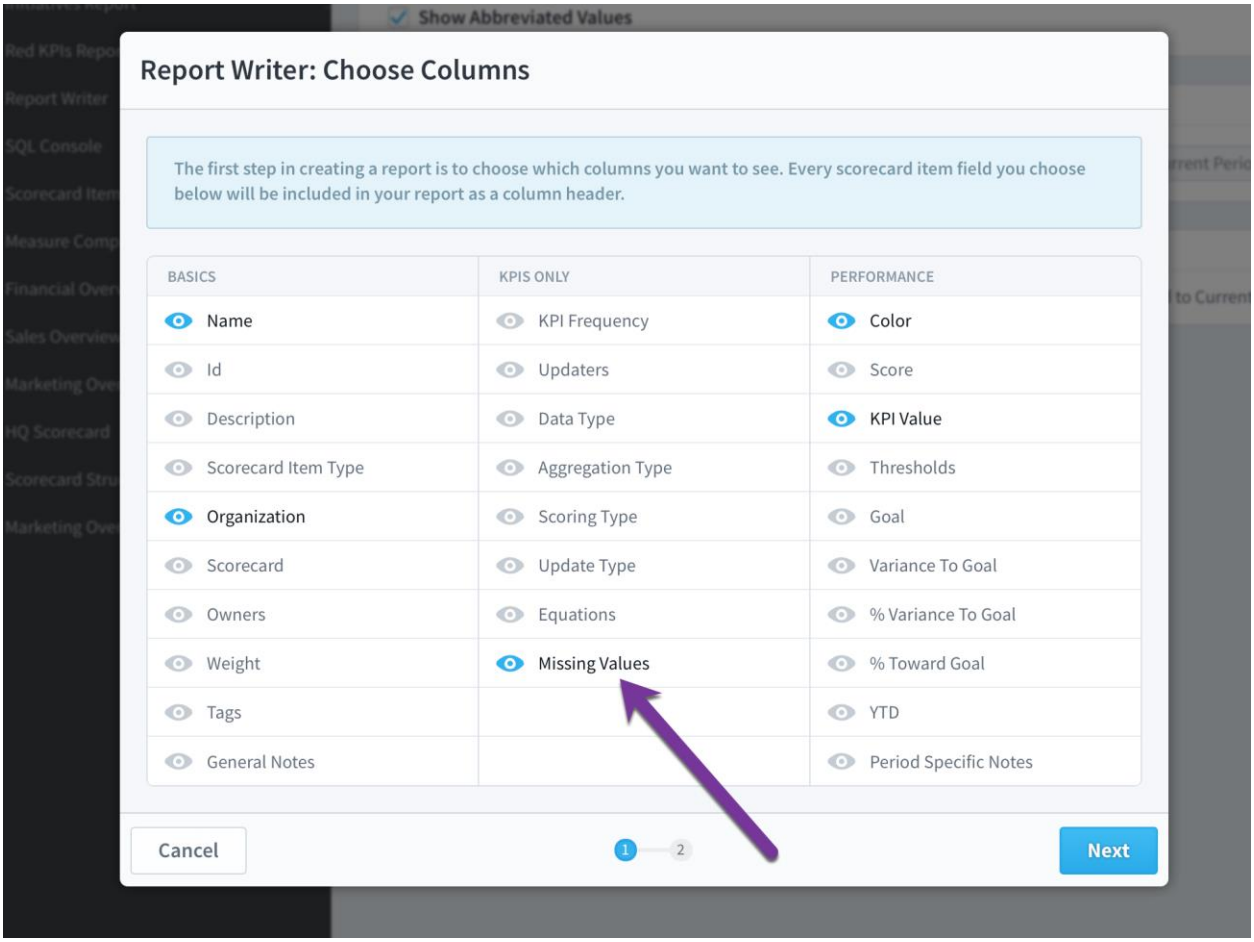


Clicking the link will take you to the Scorecards Overview tab for that particular organization/KPI combination.

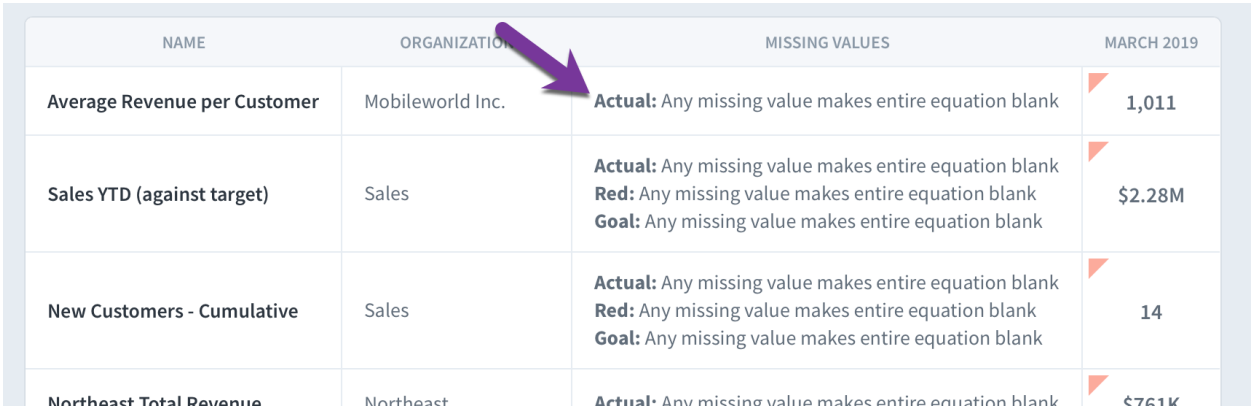


Showing “missing values” column

It’s now possible to choose “missing values” as a column when creating reports.

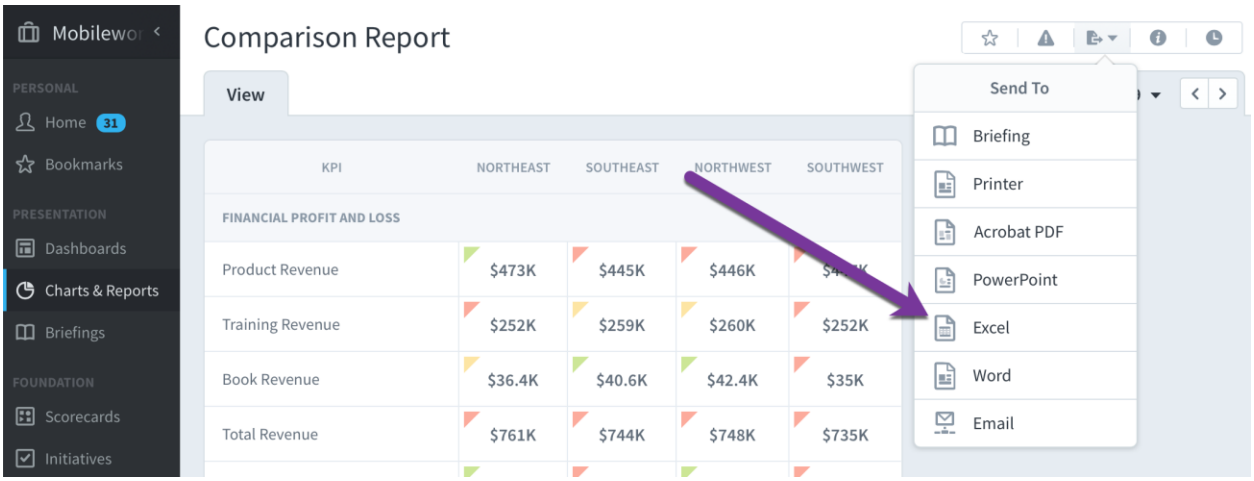


This is a field that only applies to calculated KPIs and it tells Scoreboard what to do if some of the values in an equation are missing.



Exporting KPI comparison report to Excel

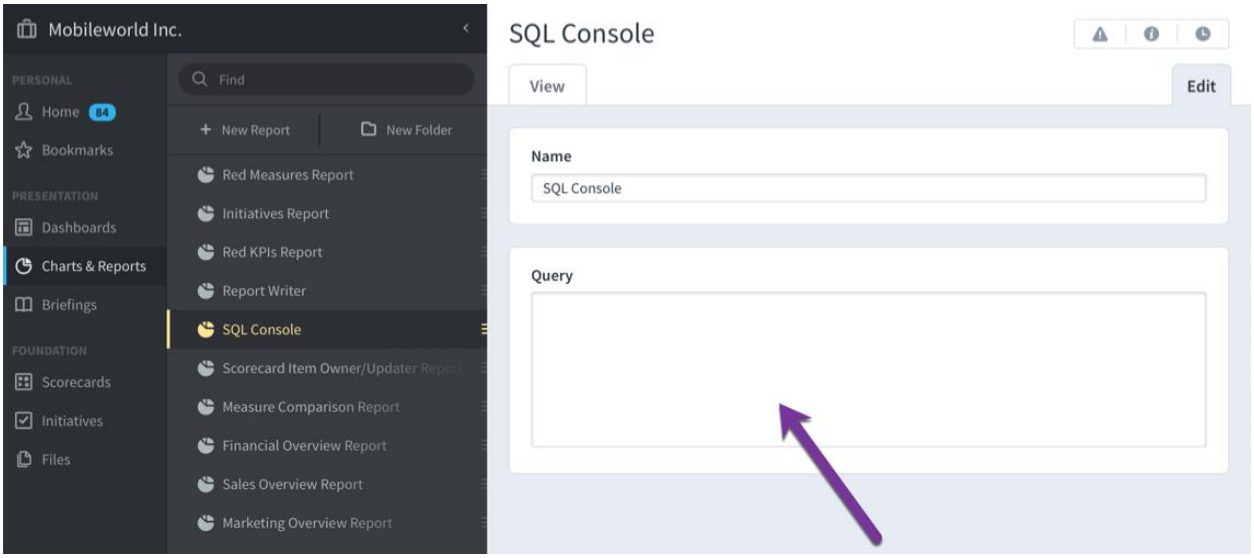
You can now export the KPI comparison report to Excel.



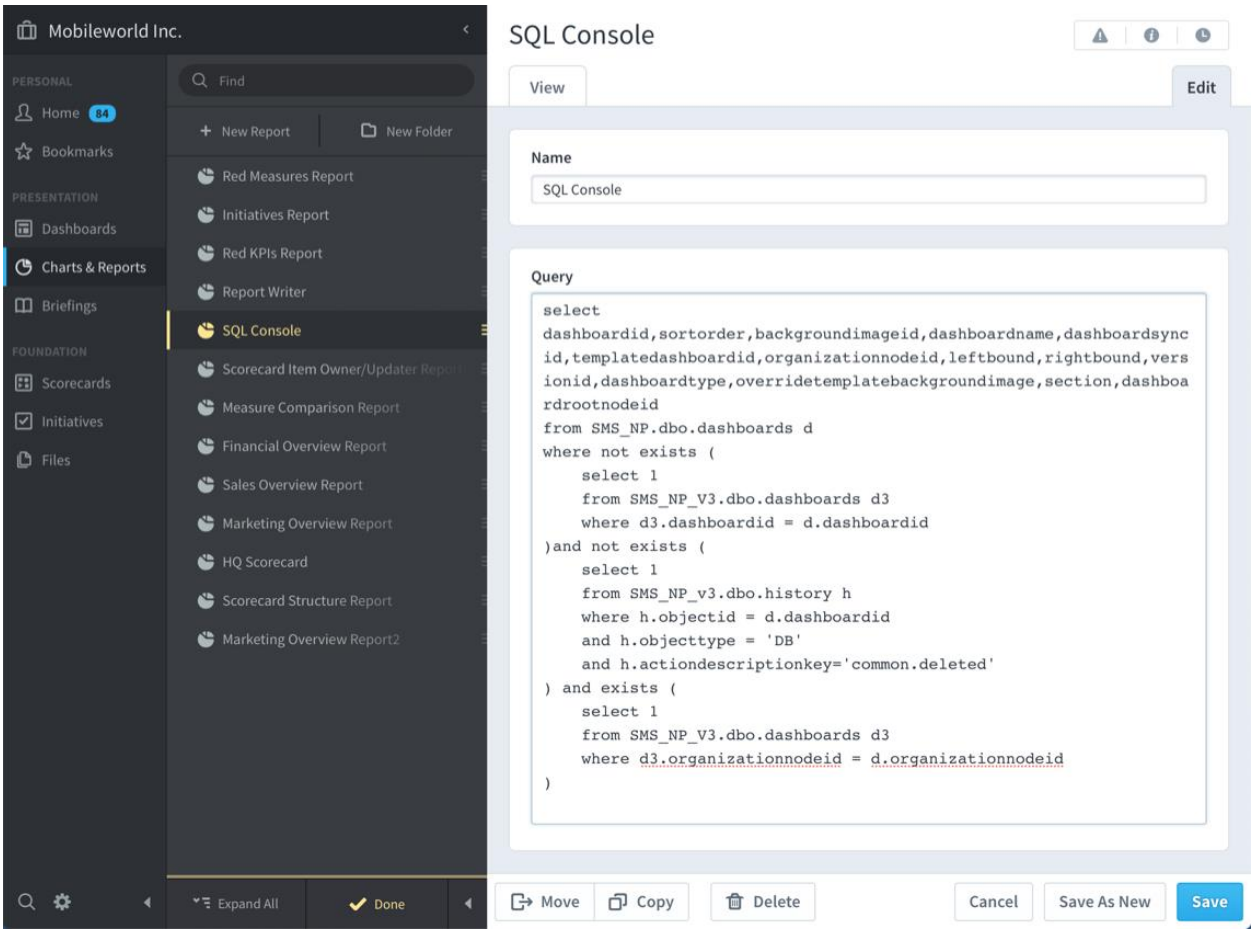
Larger text box for SQL reports

If you have permission to write SQL reports, this is what it looked like before.

In version 3.3, you now edit SQL directly on the edit tab.



Not only does this provide more space, but the text box automatically grows taller as you type.

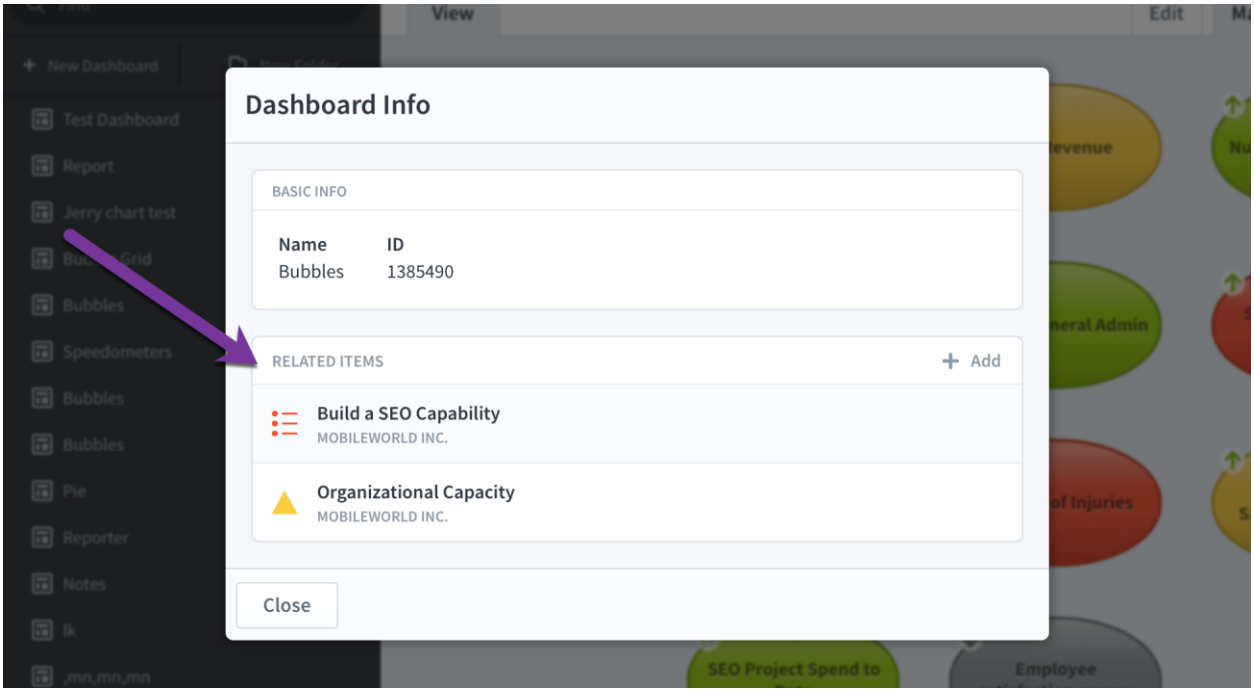


The SQL Console in the Admin section works similarly.

Related items for dashboards and reports

In the past, dashboards and reports could always be added as related items, but there was no way to view a dashboard or report and see all of its related items. In version 3.3 this information has been added to all info dialogs.

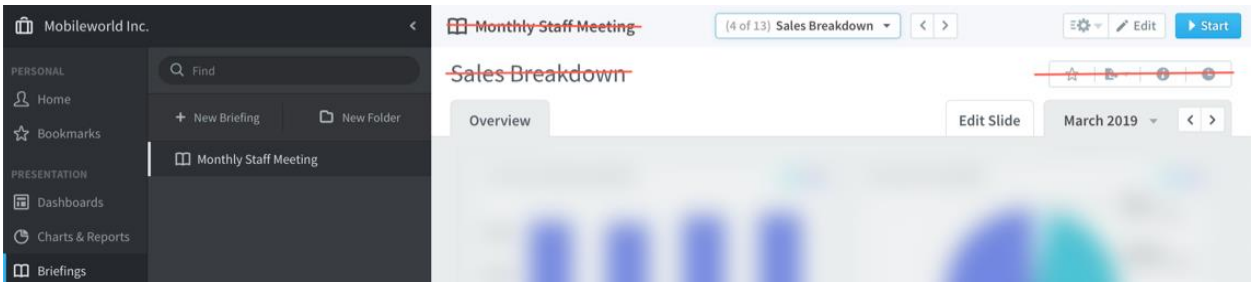
Here we see that the dashboard has two related items, and if we have the correct permissions, we can modify the related items as well.



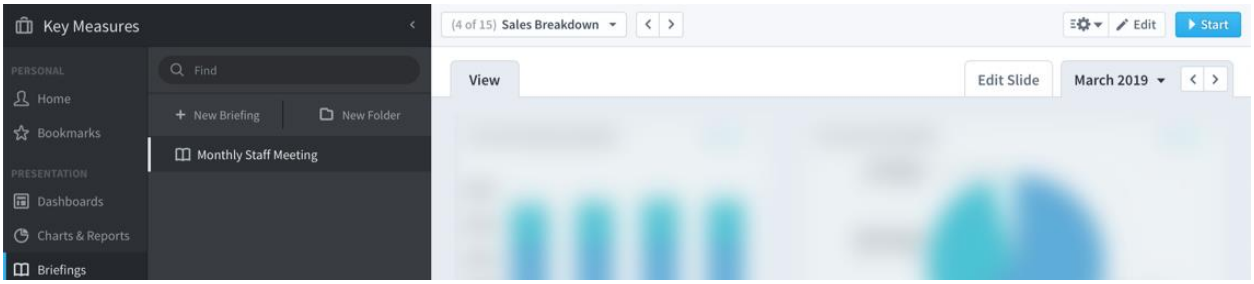
Briefings

Improved layout of Briefings section

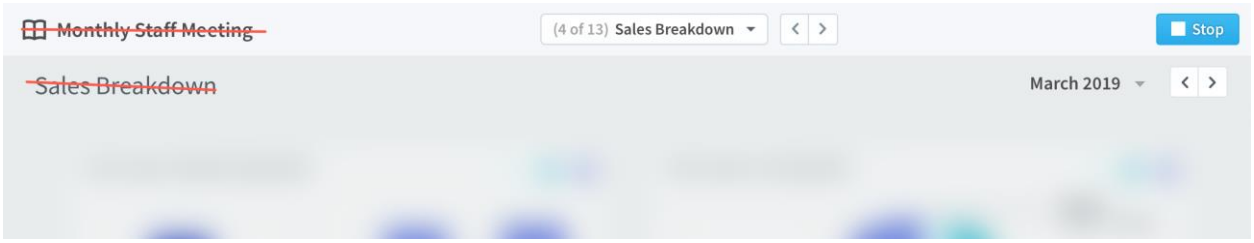
The layout of the Briefings section header has been redesigned to reduce clutter and save space. Here's the briefings section from previous versions of Scoreboard with the unnecessary items crossed out.



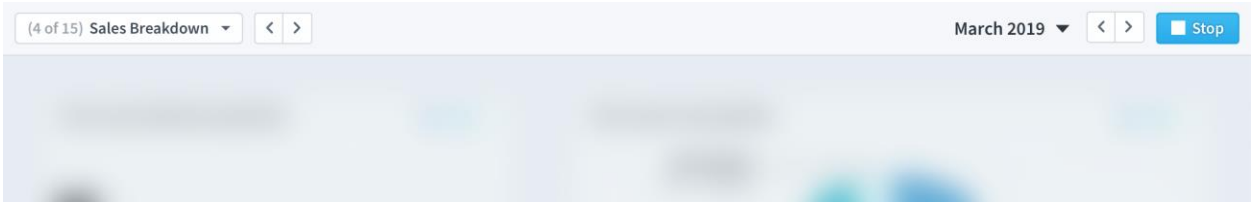
As a result, the header takes up much less vertical space in version 3.3



The same items were removed from full-screen briefings during a presentation.



Version 3.3 is now able to have one row of navigation instead of two.

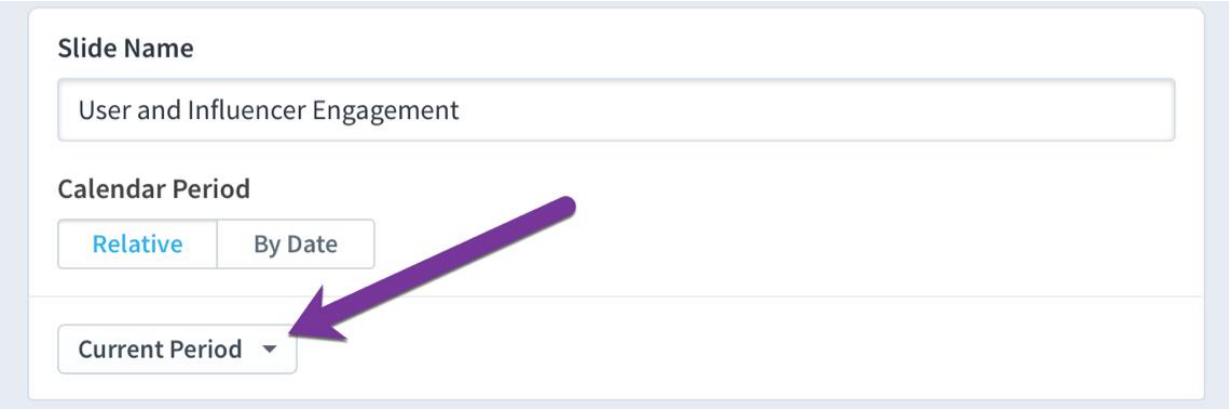


Improved “specific period” selector for briefings

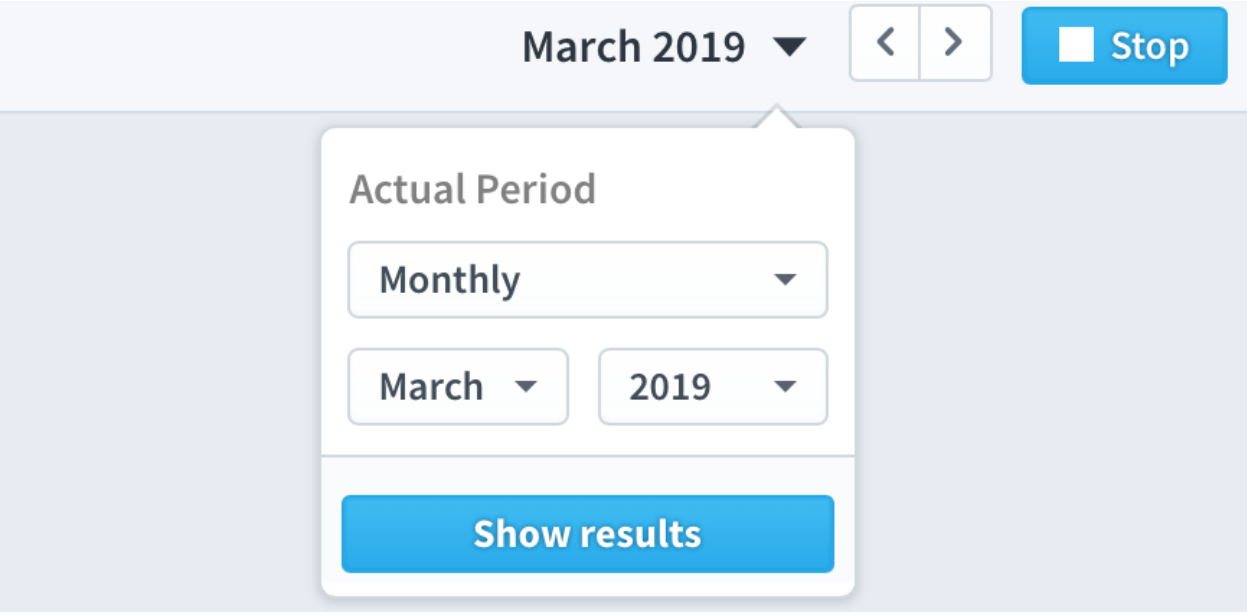
Briefings can show slides for three different types of calendar periods:

- the current calendar period (now)
- X periods earlier or later than the current period (two months ago)
- a specific calendar period that doesn't change (January 2020)

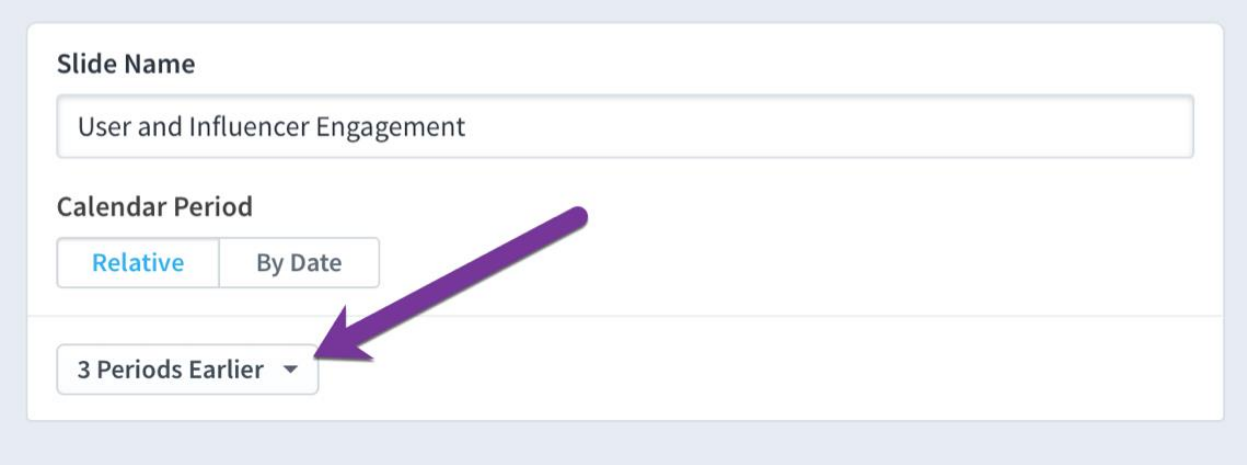
The design challenge in version 3.3 was to create a calendar period selector that made it obvious not only what data was being displayed, but why. First, let's look at a slide that shows data for the current period.



When you start the briefing, it shows “March 2019” both in the header and in the tooltip that you use to change the current period. This is the same calendar period selector used everywhere else in Scoreboard.

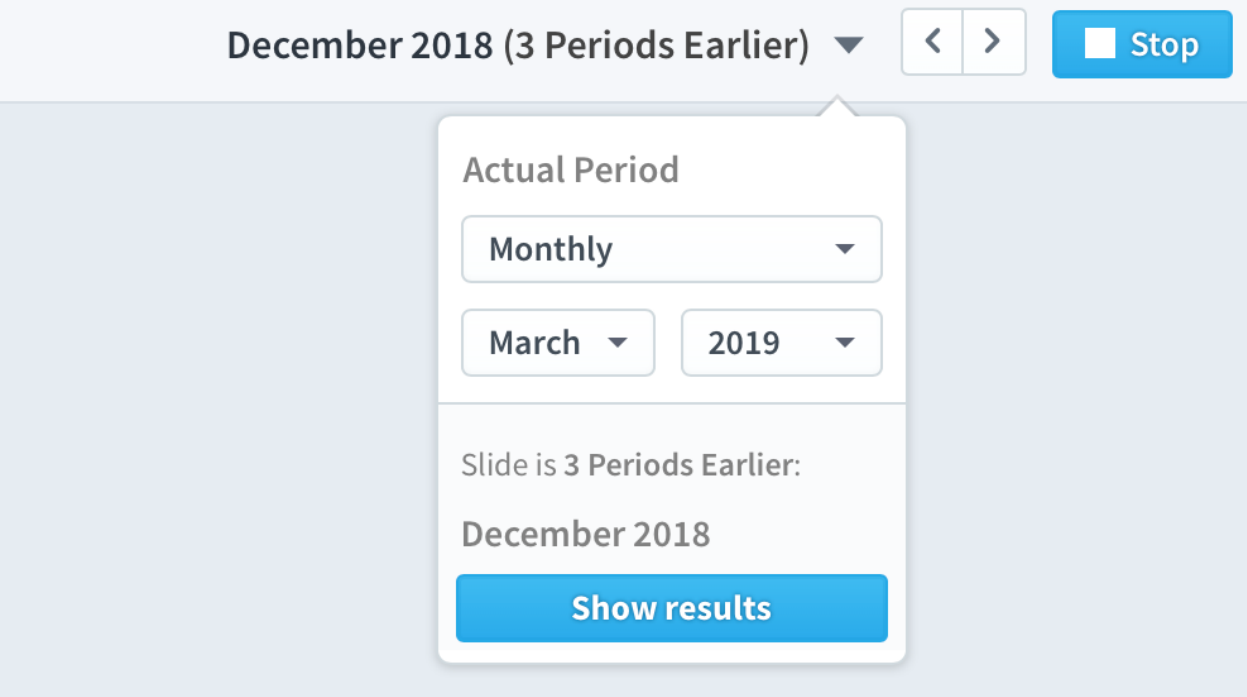


Here's a slide that shows data for 3 periods earlier than the current calendar period.

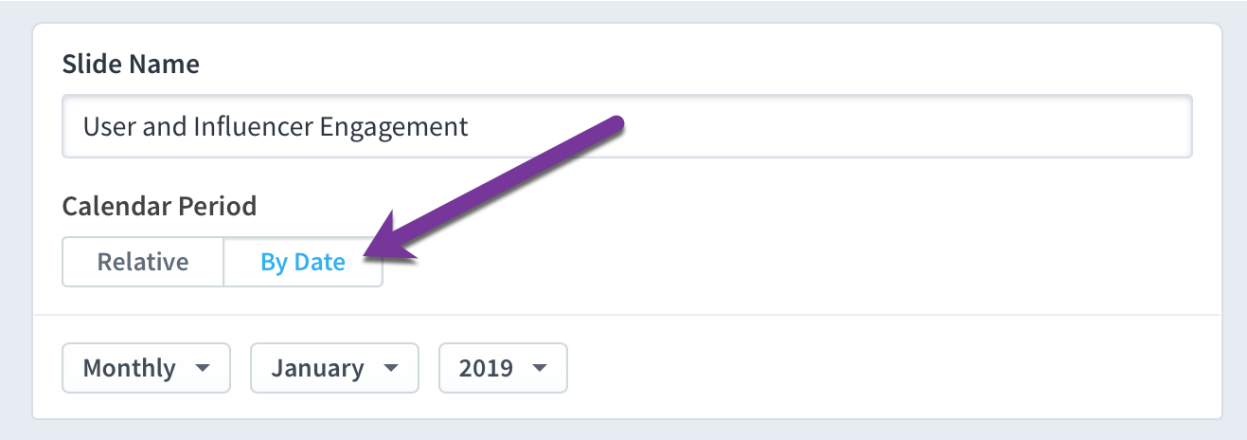


During the briefing the header says "December 2018," so you know what data you're viewing, and "3 Periods Earlier" so you know why it jumped back in time.

When you click to change the data that you're viewing, though, you can only change the current period on top, which in turn changes the slide's data. This makes it more obvious what you're actually doing when you change the calendar period selector.

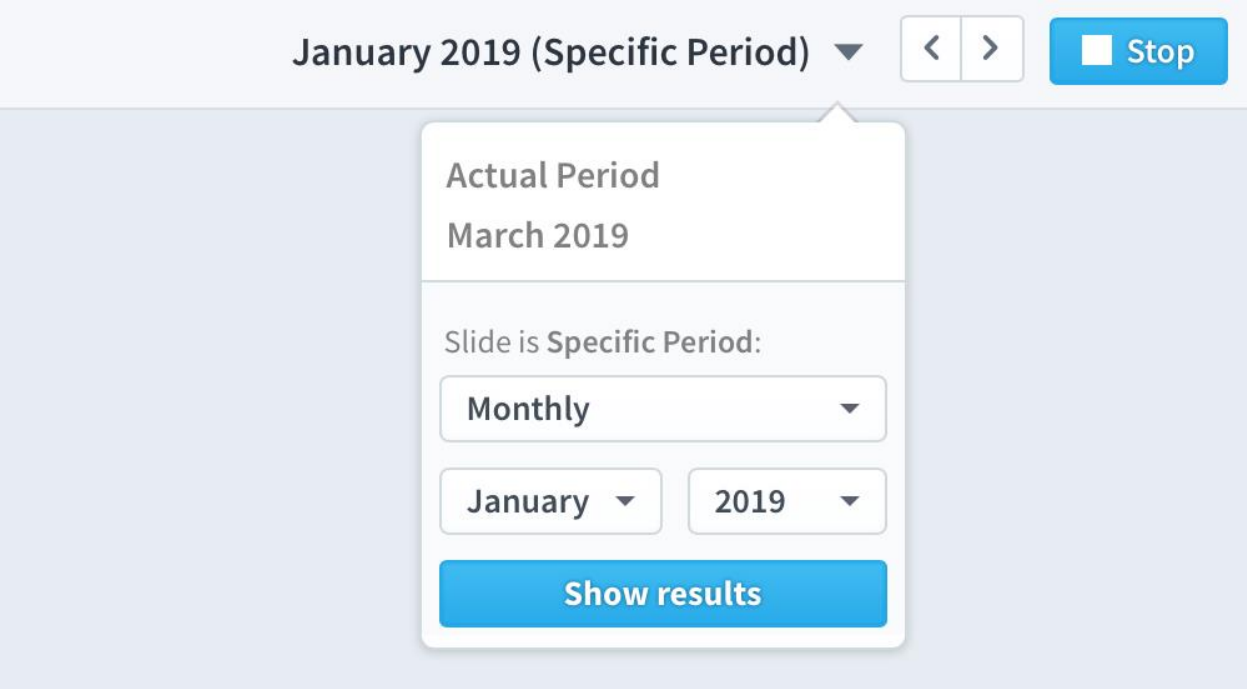


This is a slide that always shows data for a specific calendar period.



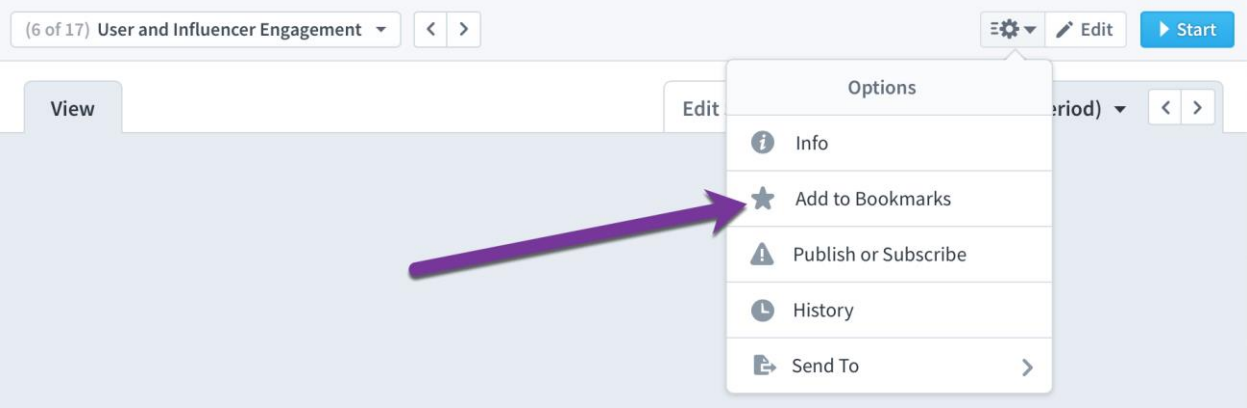
During a briefing in version 3.3, it's now obvious what is happening. The briefing header says you're viewing "January 2019" data, and it lets you know that the slide is always for a specific period.

When you click to change what data you're viewing, the actual period is now locked into March 2019 on top. You can still change the specific period that you're viewing on the bottom, but it's now clear that this won't affect the application's actual calendar period and subsequent slides.

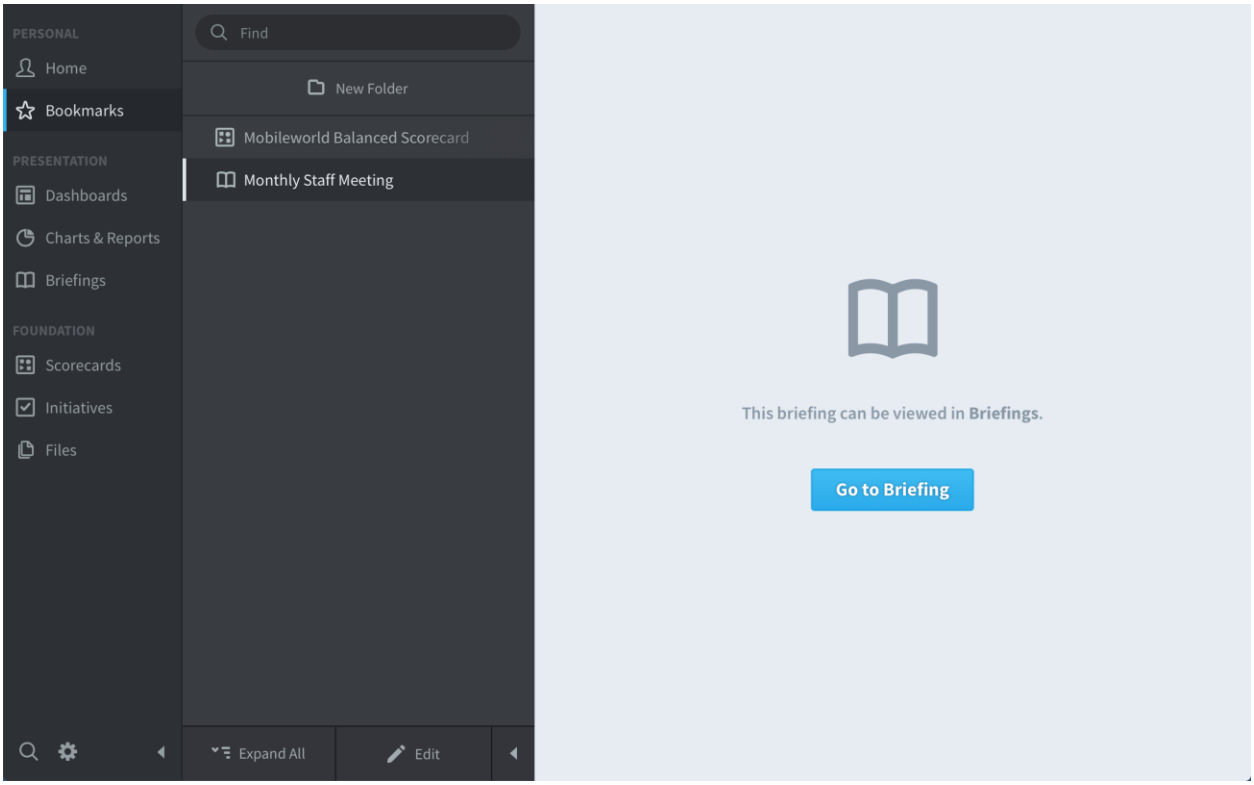


Briefing bookmarks

In version 3.3 you can now bookmark a briefing. Just click the briefing's configuration button and select "Add to Bookmarks".



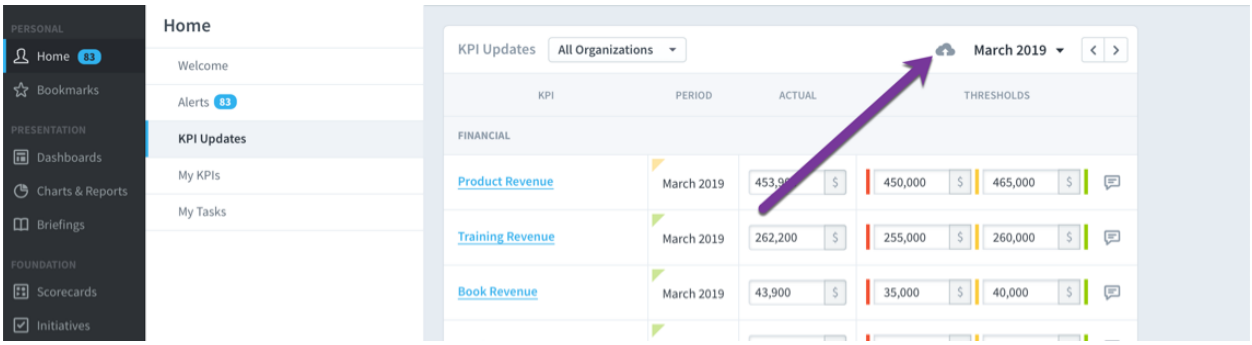
This creates a new item in your bookmarks section that you can use to jump right to your briefing.



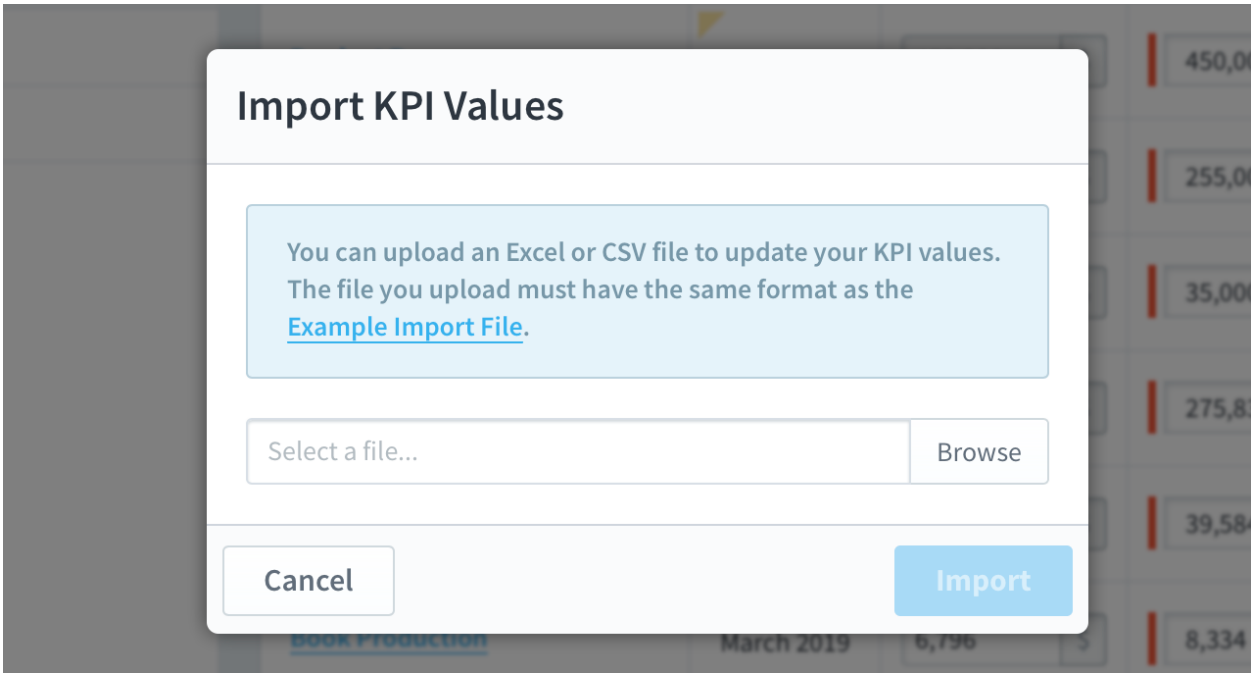
Home

Uploading KPI values in the Home section

There's a new "upload" button on the KPI Updates screen in the Home section.

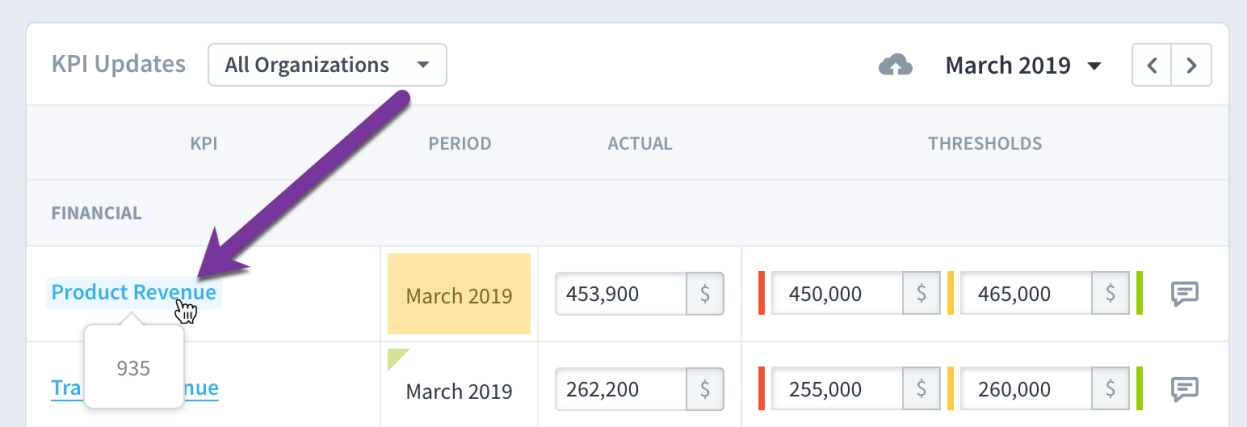


Clicking it allows you to upload a spreadsheet containing KPI values. There's even an example import file you can download.



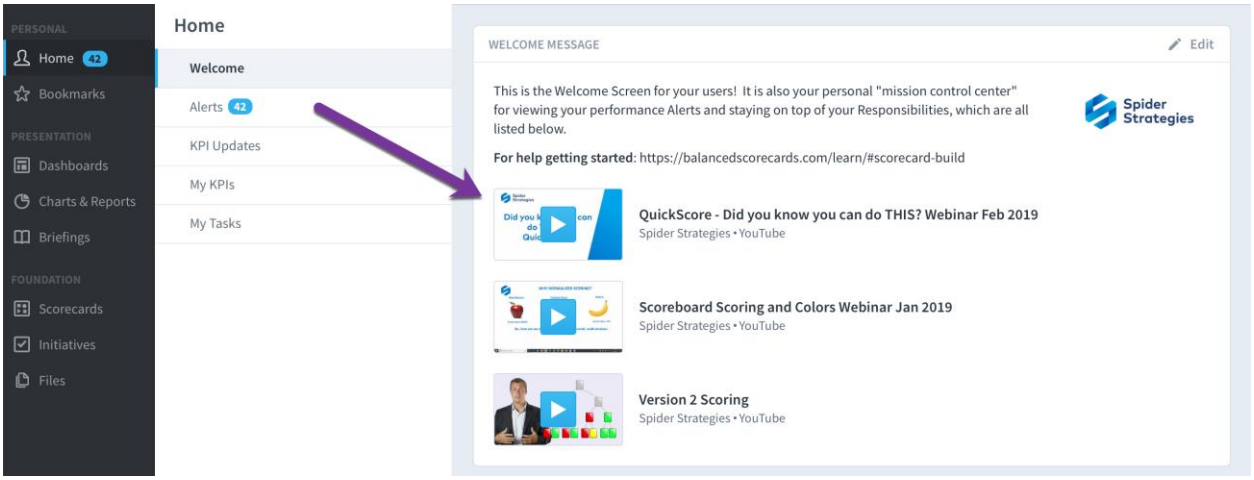
Viewing IDs on the KPI Updates screen

When you hover over KPIs on the updates screen, Scoreboard now shows the ID of the KPI in a tooltip. This can be useful to uniquely identify KPIs or when creating equations.

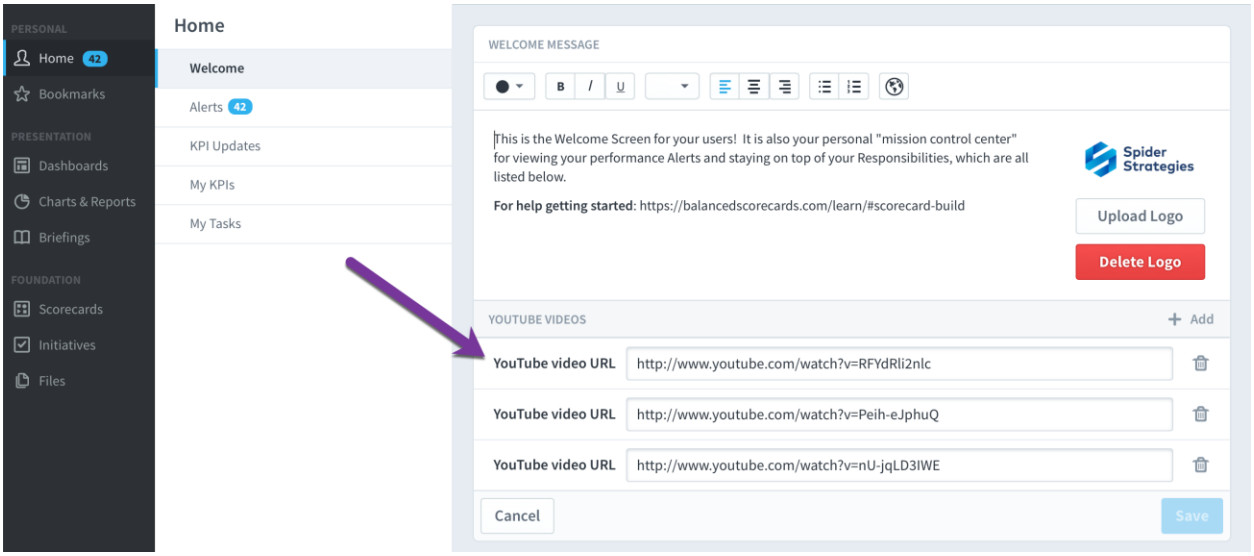


Multiple videos on Welcome page

In version 3.3 you can add multiple YouTube video on the Welcome page.



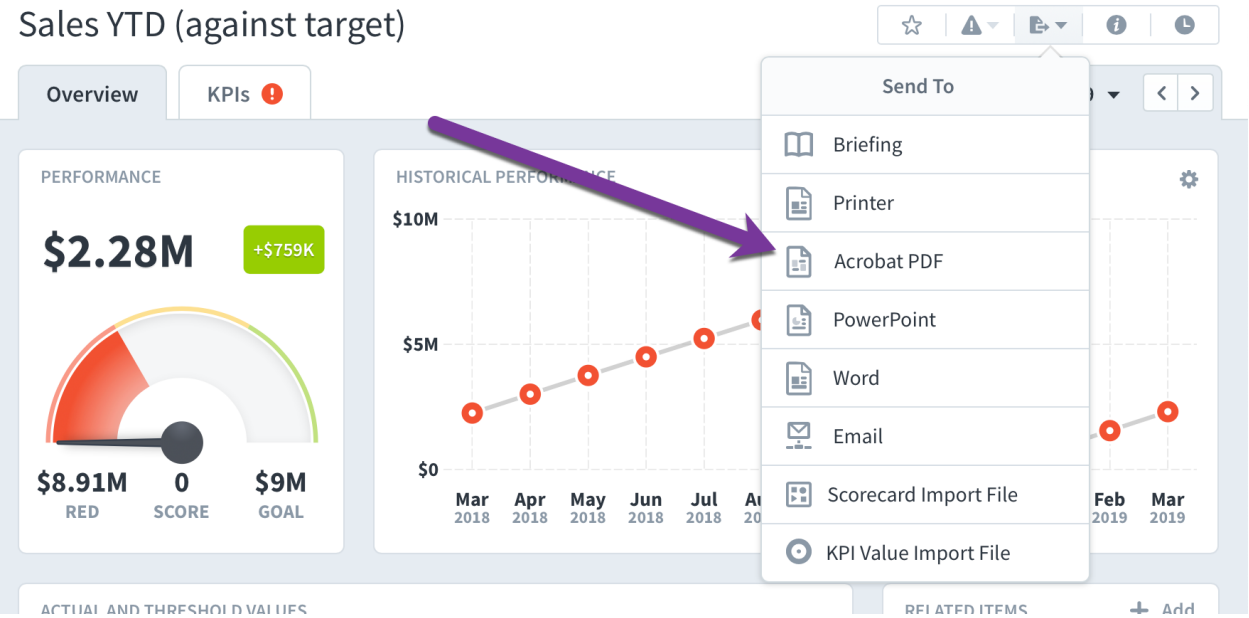
This is how you choose the videos if you have the correct permissions.



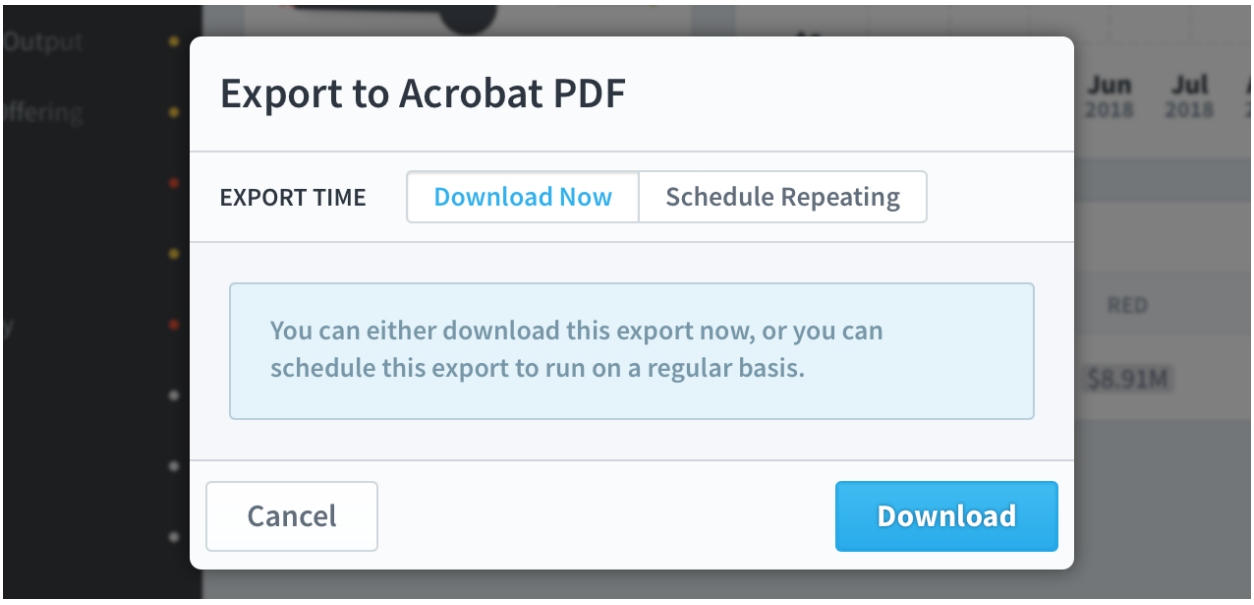
Exports, Imports, and Alerts

Scheduled exports

Version 3.3 has a new flow for creating an export. In this example we're going to create a PDF export of the "Sales YTD" KPI by clicking on the "Send to" button and selecting "Acrobat PDF."

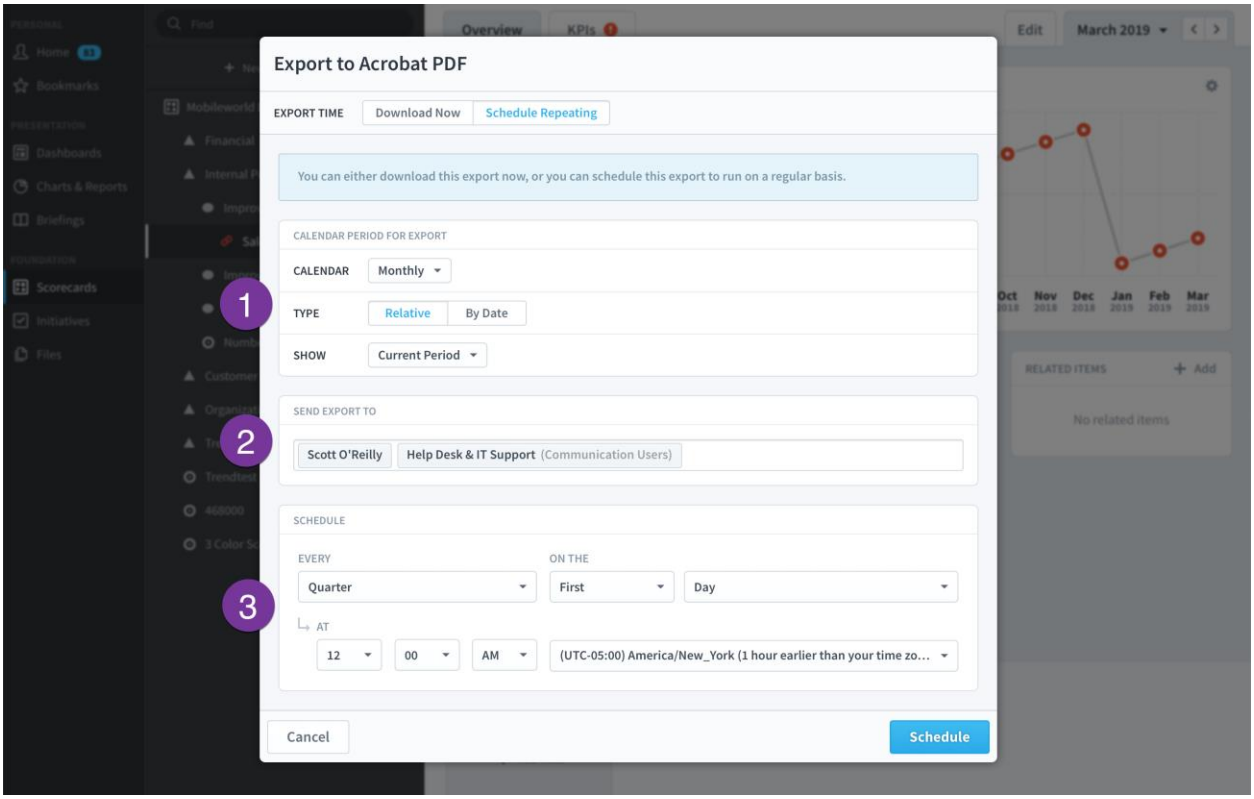


This brings up the export dialog, and the default option is to Download Now.



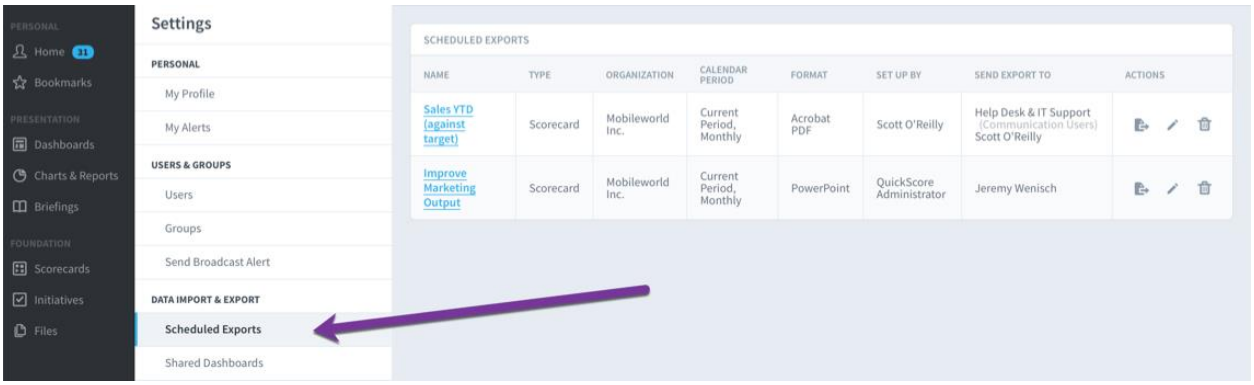
Instead, we're going to switch the toggle to Schedule Repeating. This changes to something that looks complicated at first but is actually a fairly simple three-step process:

1. What calendar period you want your export to show. For example, the current month, or the previous quarter.
2. Whom to send the export to. This can be any user or group.
3. When to send the export. For example, every Tuesday, or 3 days after the end of the quarter.



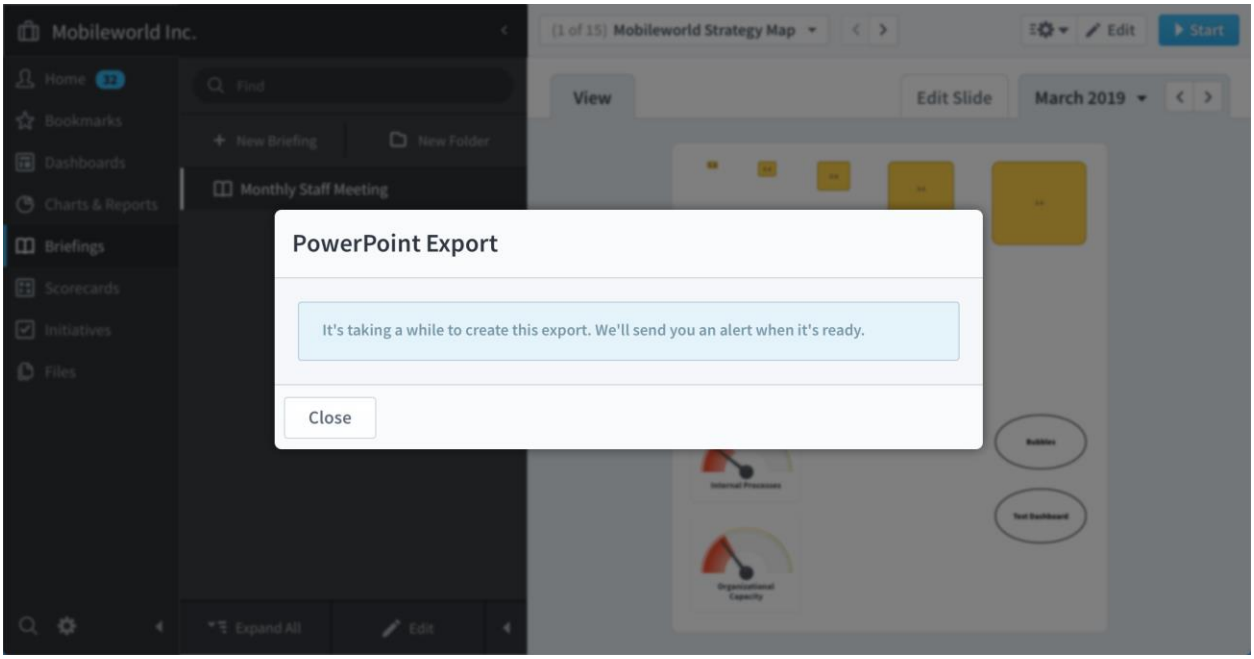
Once you schedule your export, Scoreboard will then generate alerts on a regular basis to all of the users and groups you've chosen. The alerts will contain a link to download the file, and if the recipients have chosen to receive email notifications for their alerts, they'll also receive the file as an email attachment.

Finally, one your export is created, you can manage it on the Scheduled Exports page in Administration.

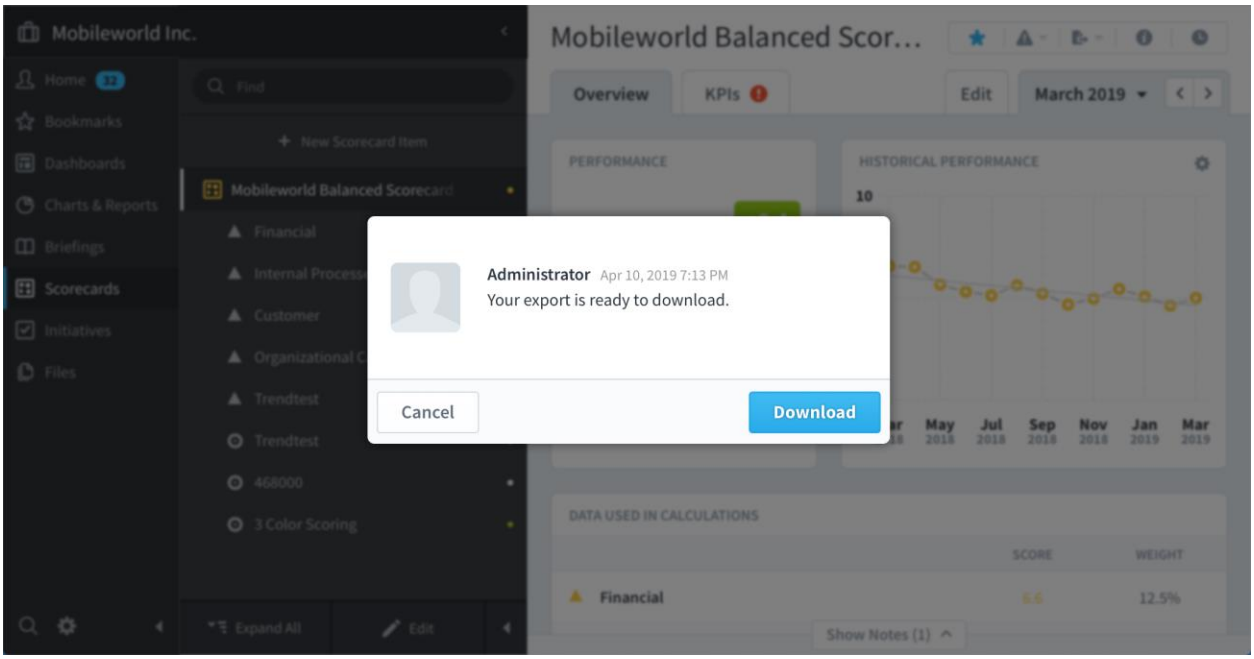


New download alerts for long exports

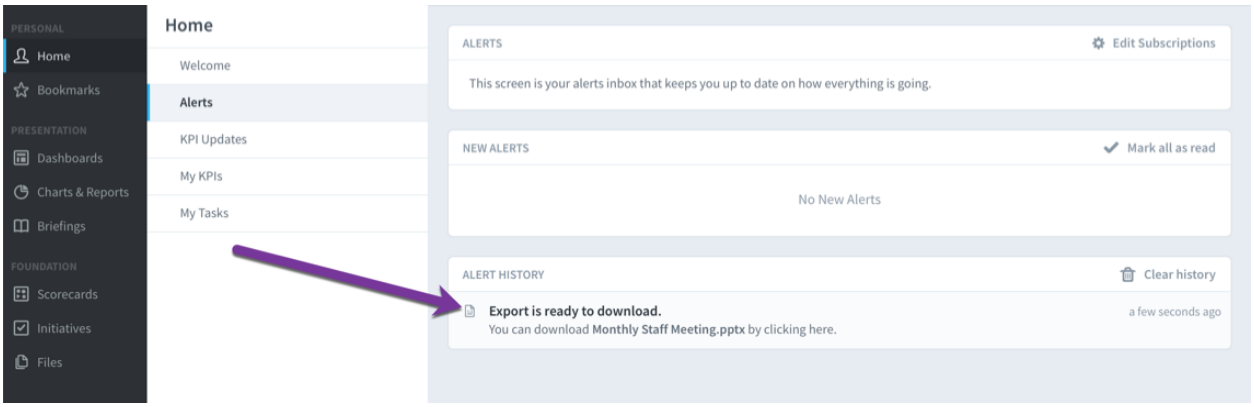
When you create an export, Scoreboard tries to download the file in a new browser tab. Downloads often start immediately, but larger exports can take minutes to generate. If the download doesn't start within several seconds, the new tab will close and version 3.3 will show this dialog.



At this point you can continue using Scoreboard as you were before. When the export is ready to be downloaded, you'll see a popup alert that looks like this.

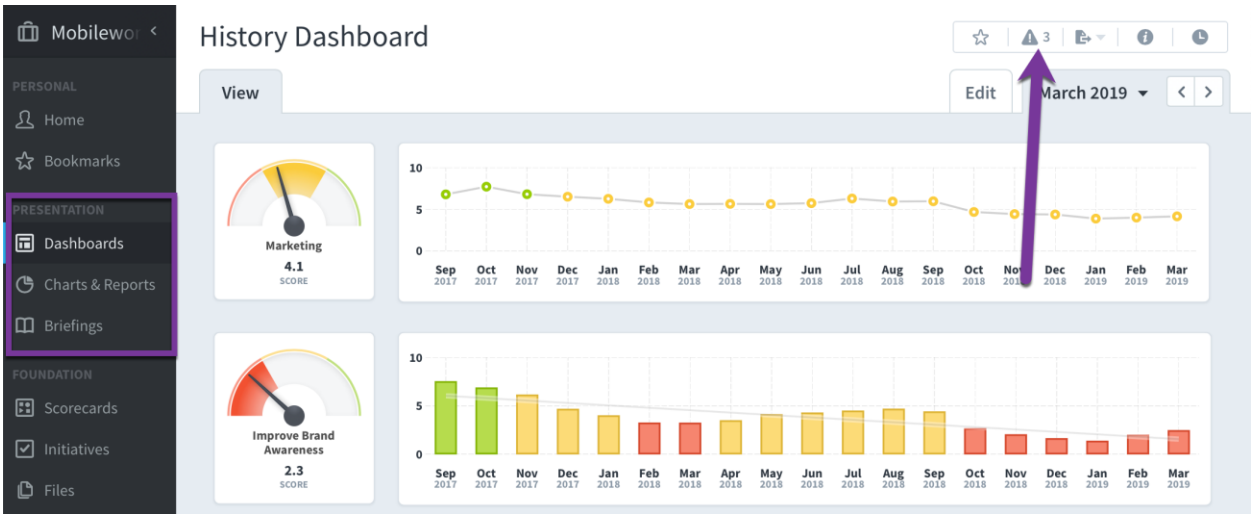


If you're not logged in at that point, don't worry. You'll receive your download link as an Alert too.



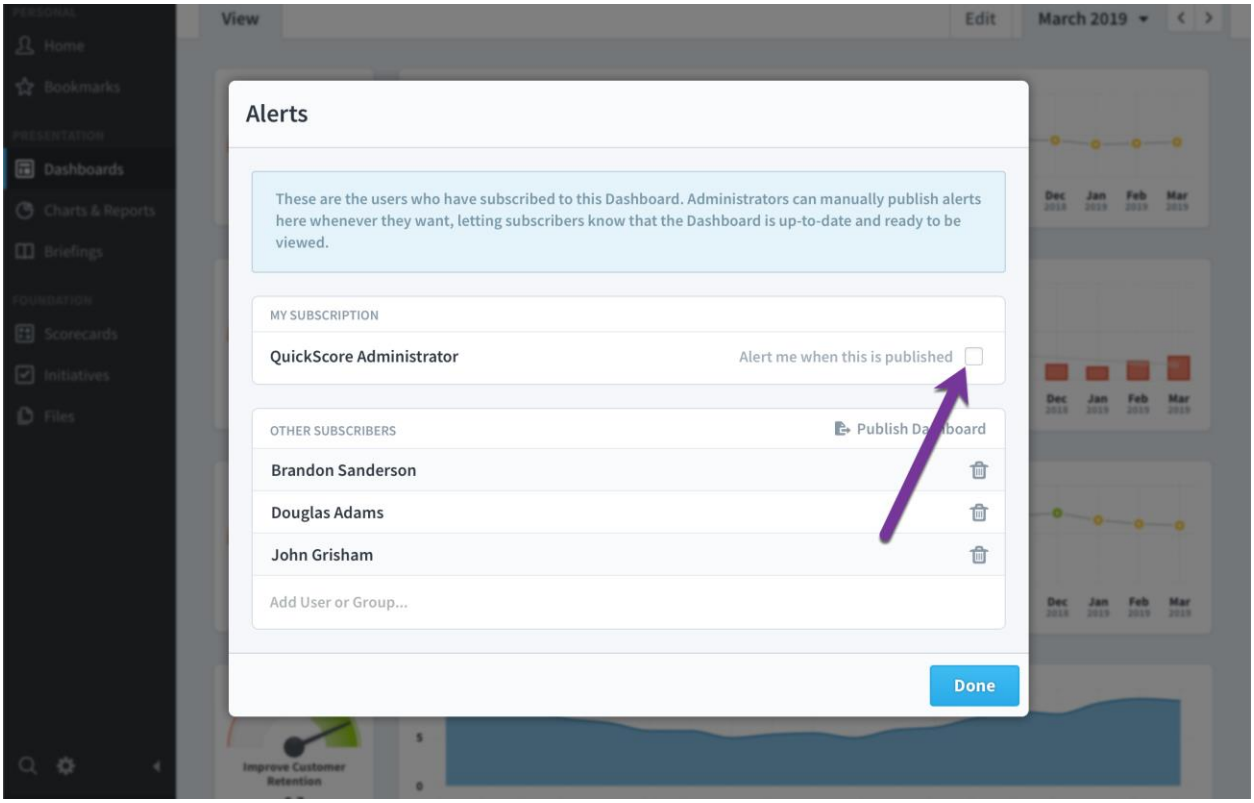
Subscribe and Publish

All of the Presentation sections (Dashboards, Reports, and Briefings) now have an Alert button in version 3.3. If there is a number next to the alert icon, that means there are people subscribed to be alerted whenever that item is published.

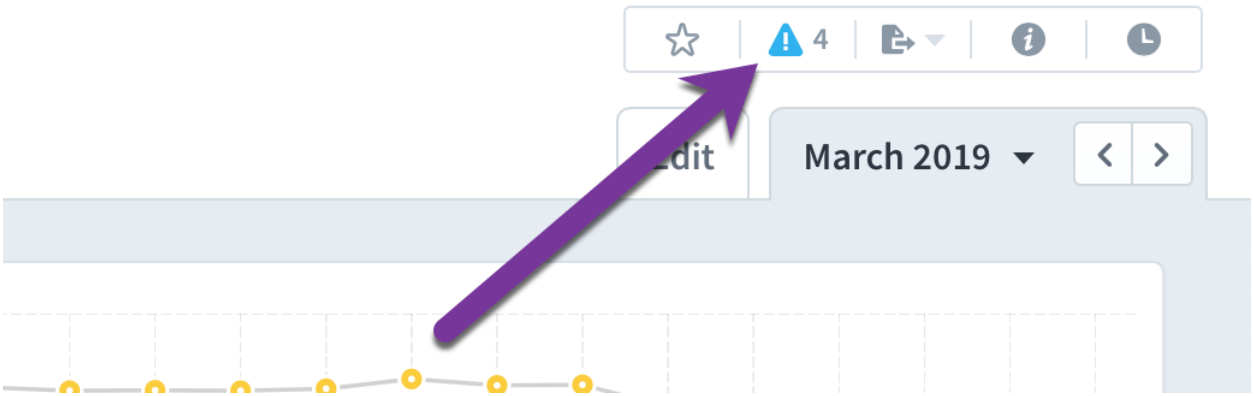


When we click on the alert button for these sections, we see a dialog like this. On the bottom it lists the three users who have subscribed to this item, and if you have the correct permissions, you can add or remove users.

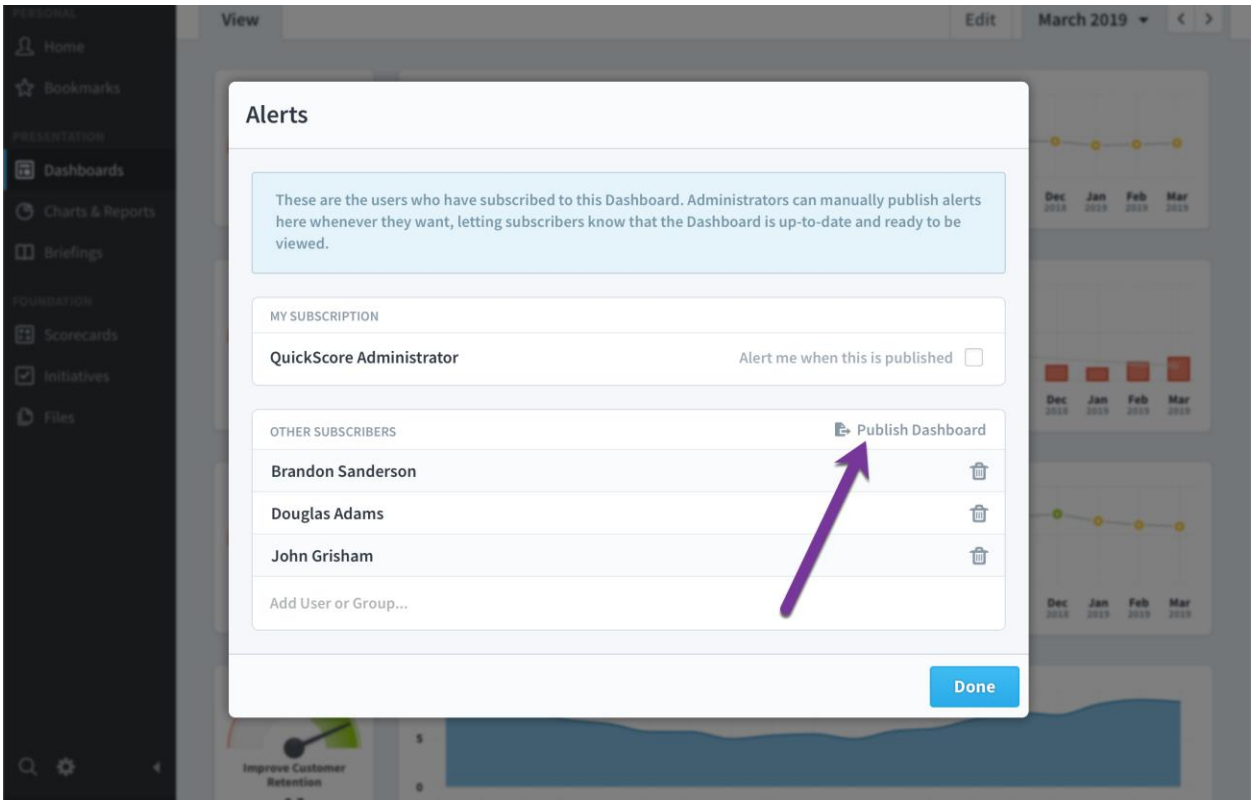
Regardless of your permissions, however, you can always check the box for "Alert me when this is published" in the "My Subscription" box.



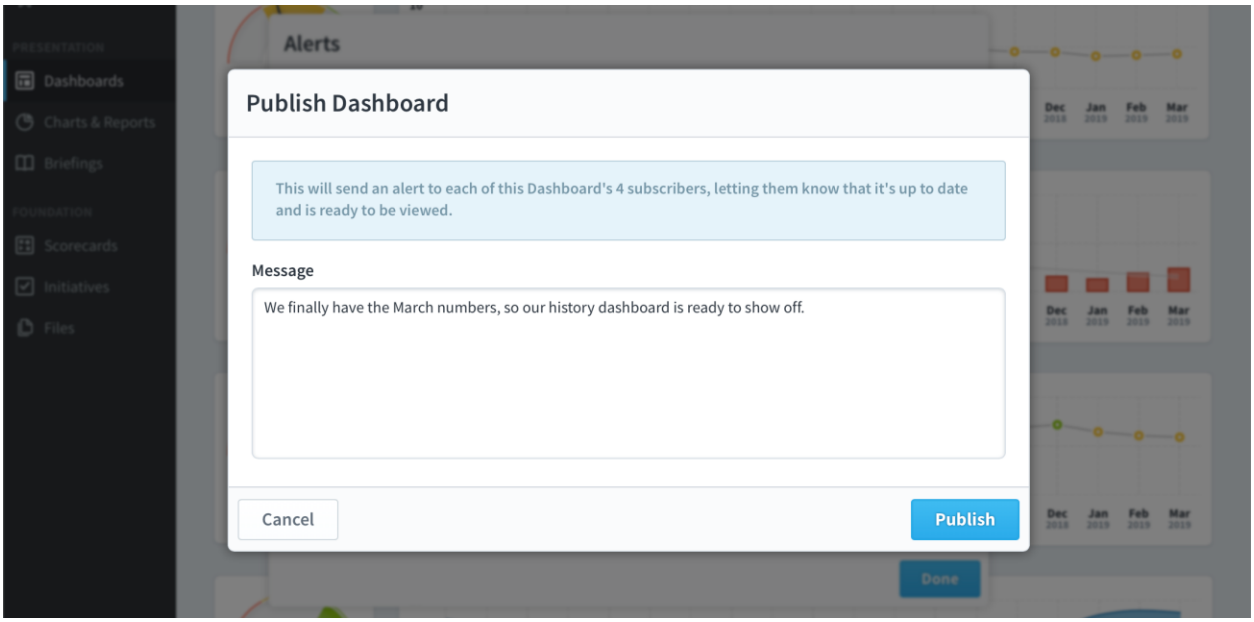
When we do this, the number of subscribers increases by one, and the alert indicator turns blue, showing that I'm subscribed to the selected item.



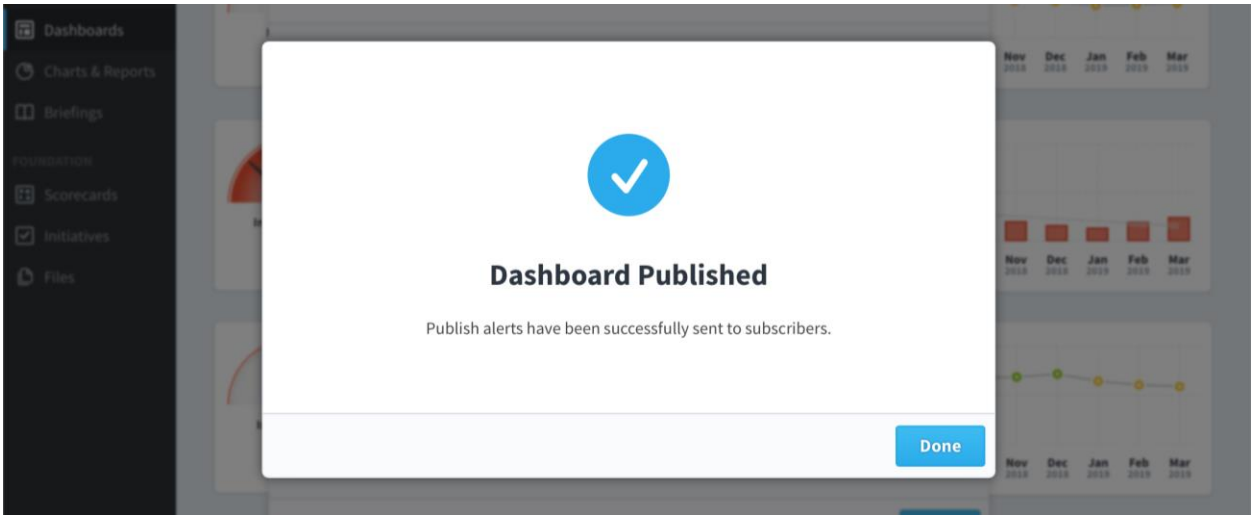
Let's click the alert button again to revisit the dialog. If you have the correct permissions, you'll also see a button to publish the item.



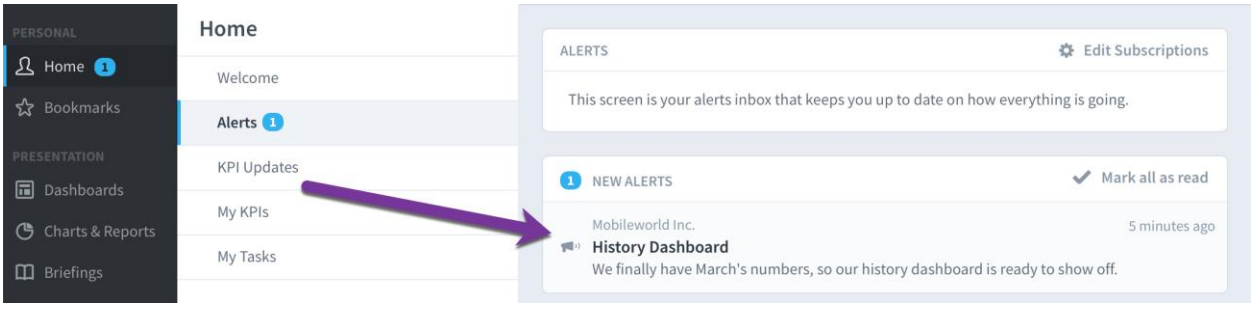
This opens a second-level dialog where you can write a message to everyone who has subscribed to the item. In this example we're letting them know that the latest values have been entered and the dashboard is ready to view.



After you click Publish, you'll see a success message like this one.

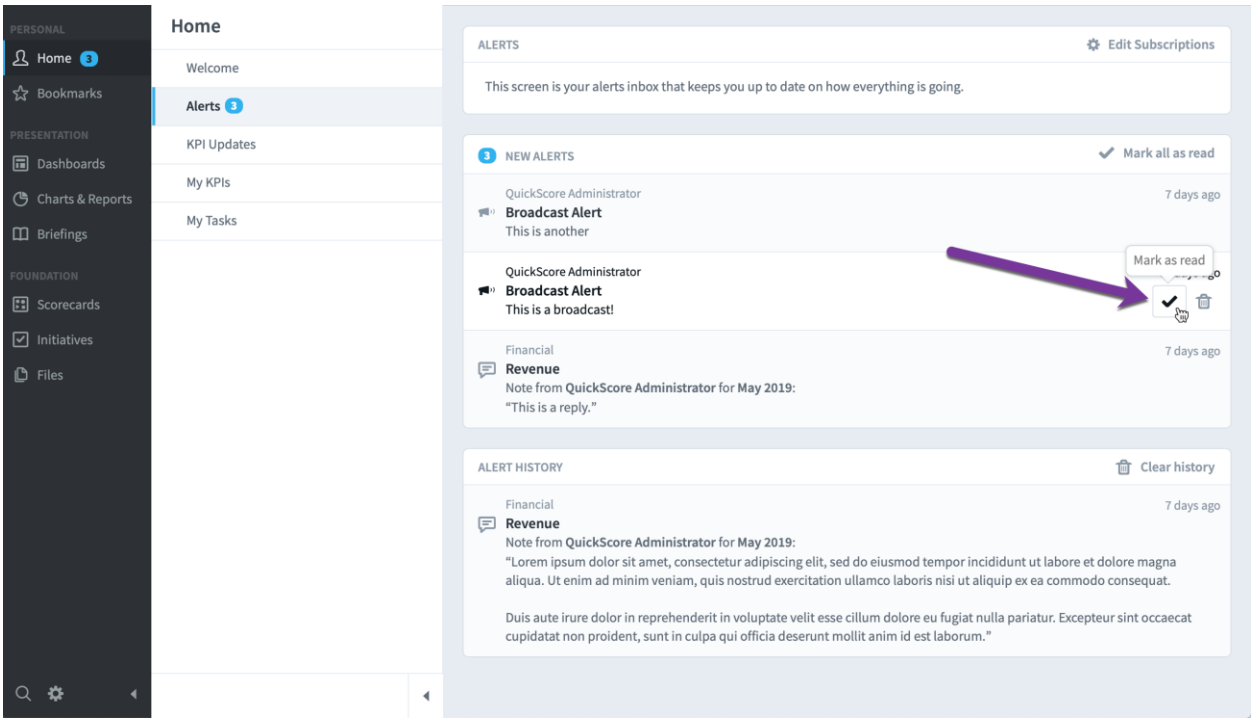


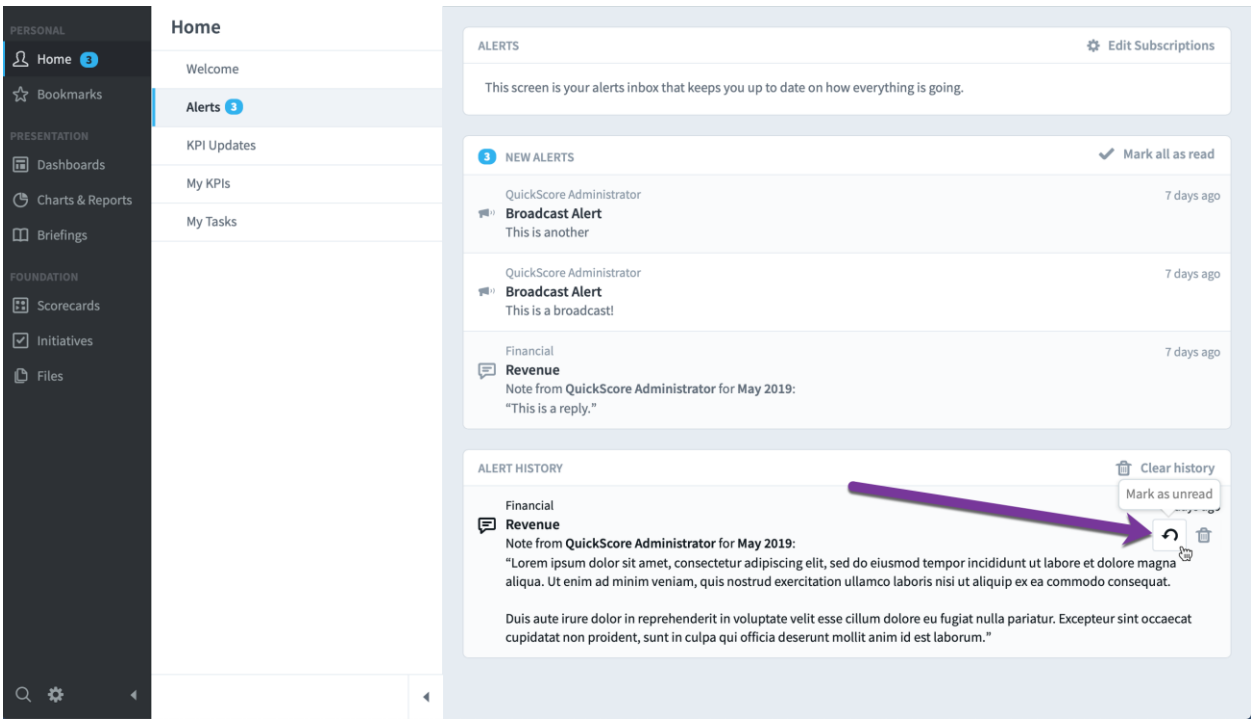
All of the subscribers will receive an alert with your message and a link to the item. If they've chosen to receive email notifications for alerts, they'll also get an export of the item attached to the alert email.



Delete individual alerts or mark as read/unread

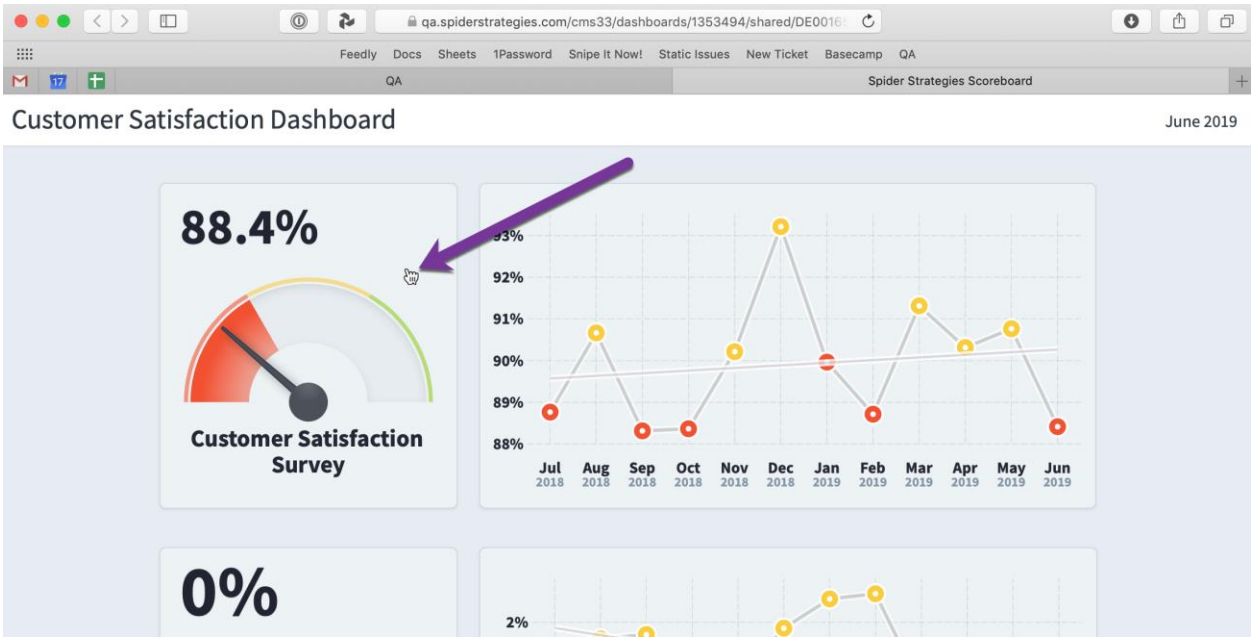
You can now interact with individual alerts, deleting them, or marking them as read or unread. Clicking on an alert to drill down now automatically marks it as read too.



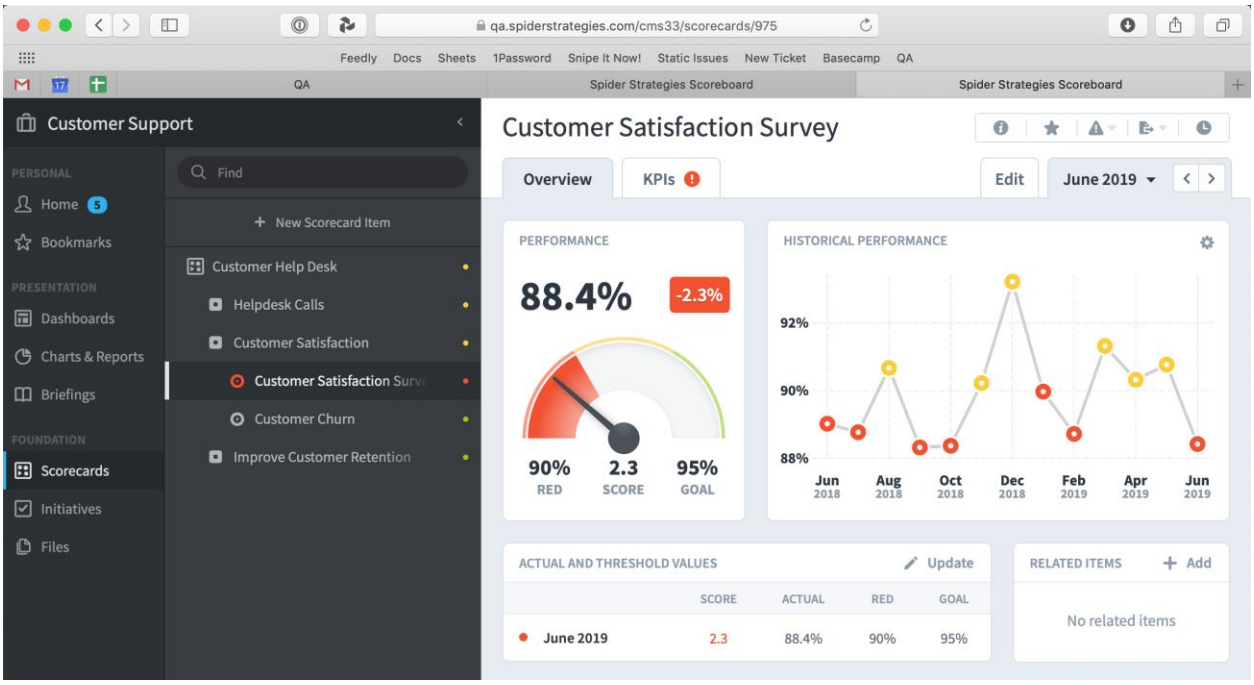


Clickable links in embedded dashboards

Embedded dashboards now have drilldown links, just like when you view them in Scoreboard.

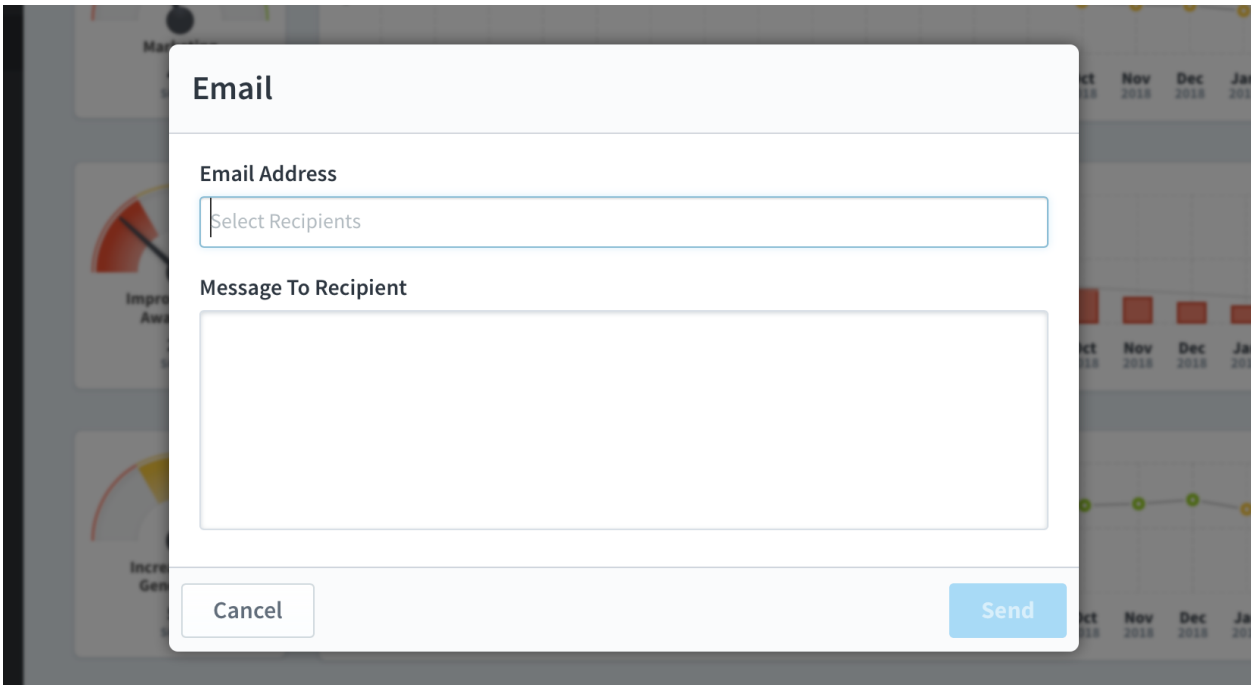


Clicking on the link will send you to a login screen if you're not logged in yet, and then directly to the relevant screen in Scoreboard.

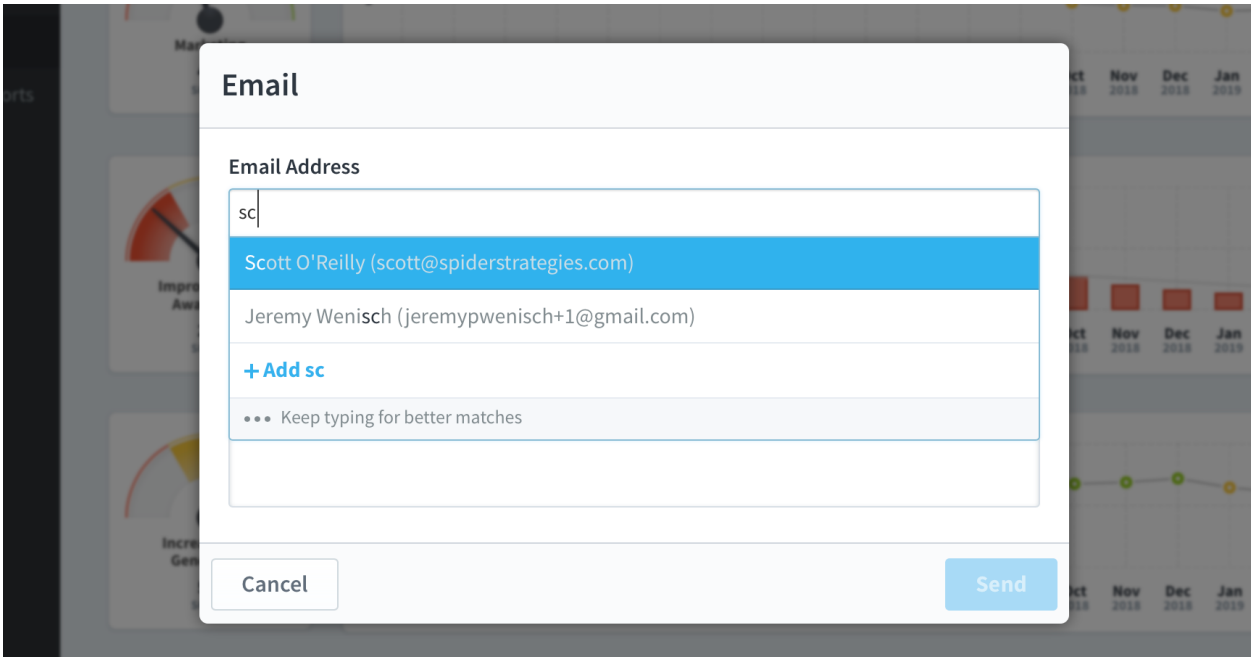


Address suggestions when sending to email

When you choose “Email” in the “Send to” menu, Scoreboard shows this dialog.

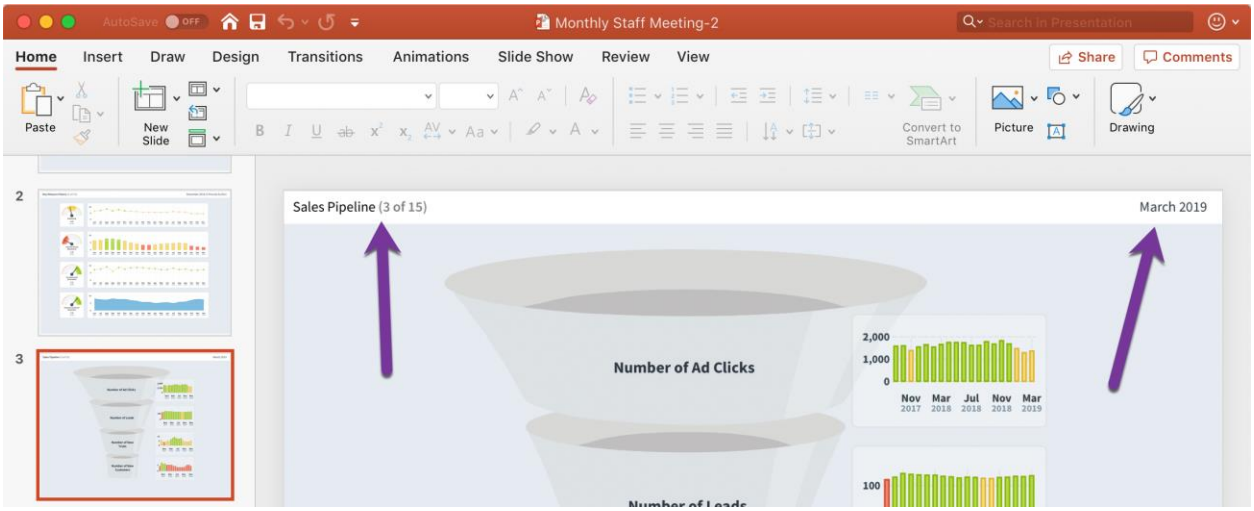


In version 3.3 you now get auto-fill suggestions for existing users, and you can continue to type an email that isn’t associated with any user.



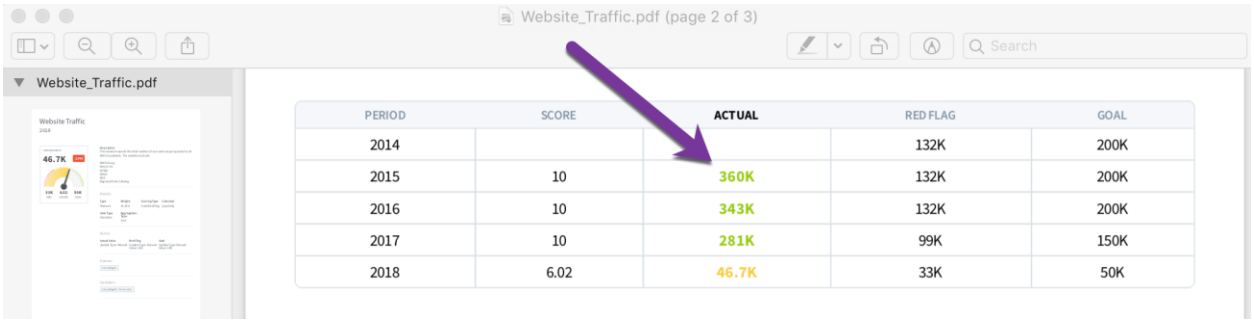
Slide numbers and titles on briefing exports

Version 3.3 now adds the briefing slide title and slide number to exports.



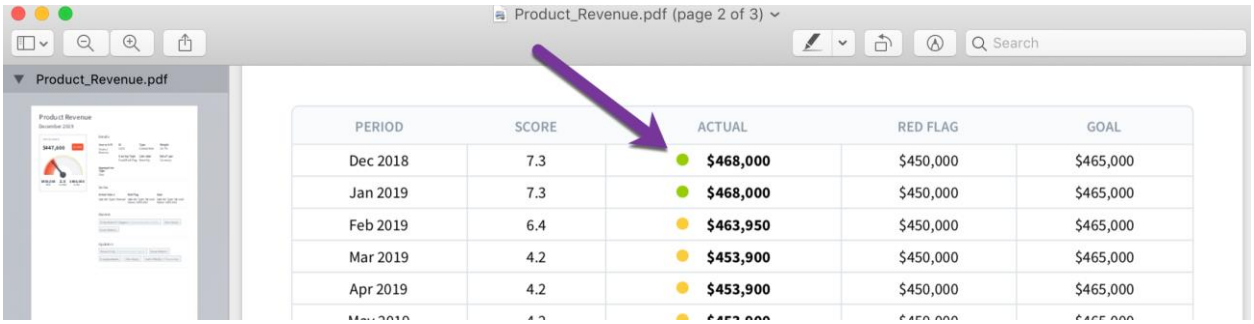
Better export colors

In previous versions of Scoreboard, some numbers were colored to show their performance. While this isn't a problem inside of the app, this can cause problems with printing.



PERIOD	SCORE	ACTUAL	RED FLAG	GOAL
2014			132K	200K
2015	10	360K	132K	200K
2016	10	343K	132K	200K
2017	10	281K	99K	150K
2018	6.02	46.7K	33K	50K

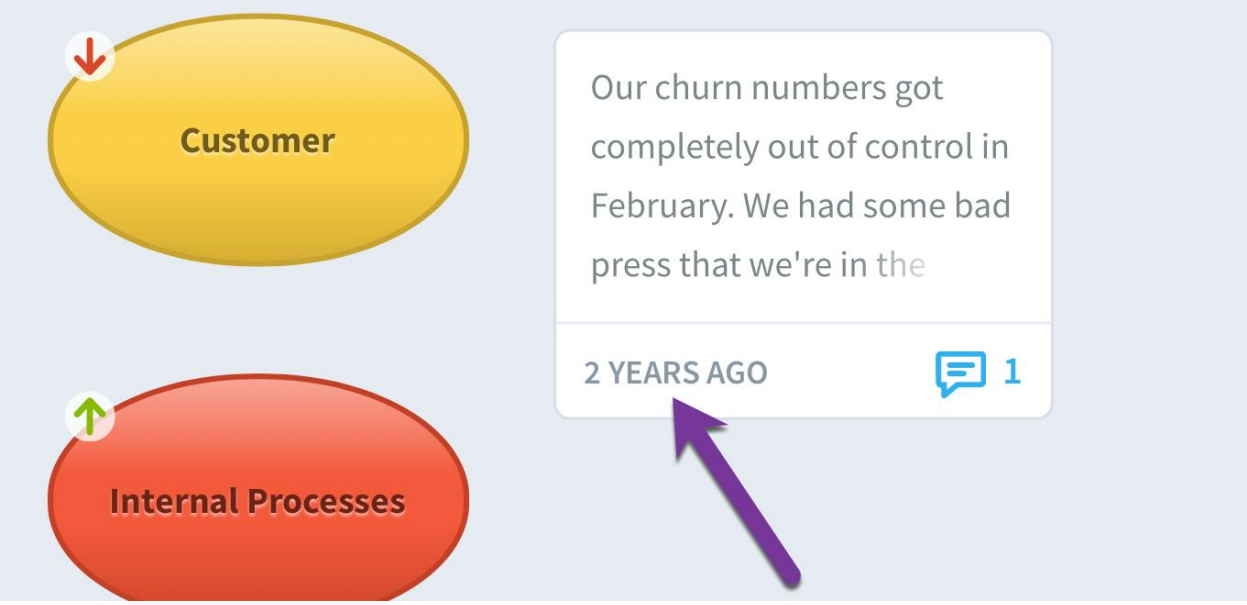
In version 3.3, exported numbers are now black with colored circles indicating performance next to them.



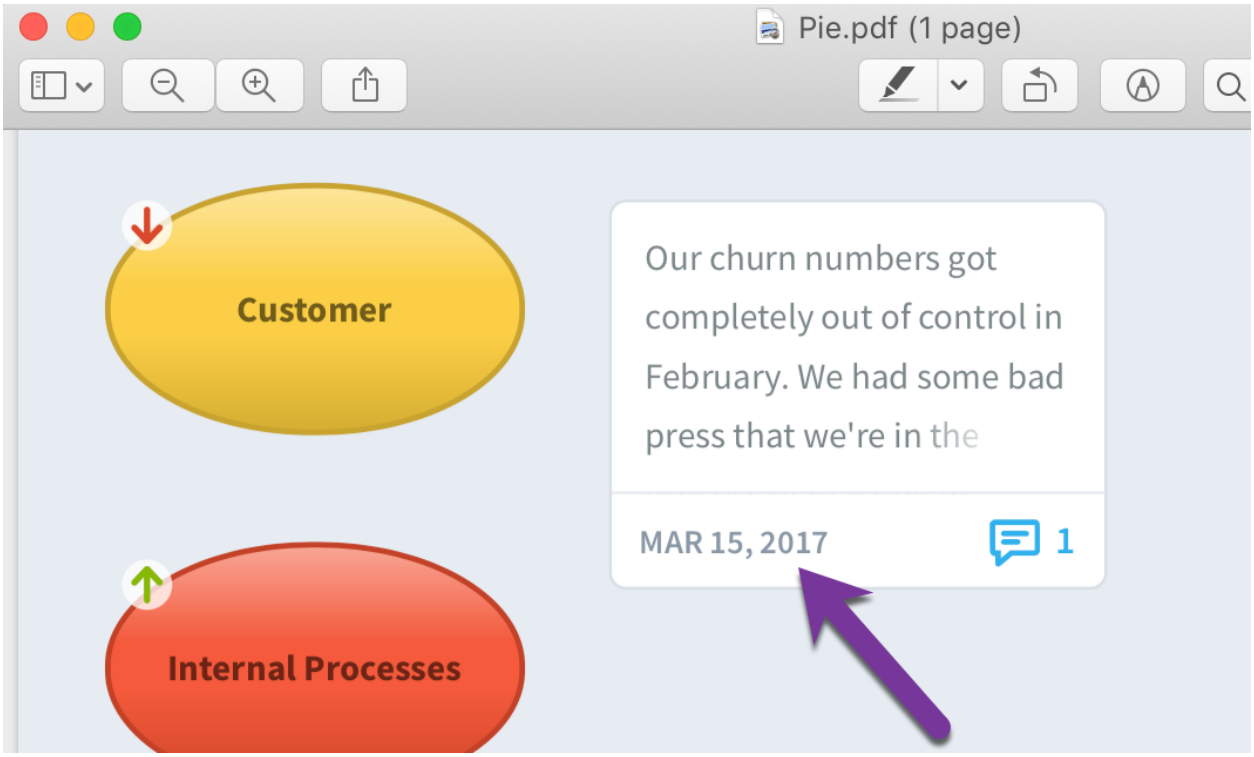
PERIOD	SCORE	ACTUAL	RED FLAG	GOAL
Dec 2018	7.3	$468,000	$450,000	$465,000
Jan 2019	7.3	$468,000	$450,000	$465,000
Feb 2019	6.4	$463,950	$450,000	$465,000
Mar 2019	4.2	$453,900	$450,000	$465,000
Apr 2019	4.2	$453,900	$450,000	$465,000

Exports show specific dates

There are many places in Scoreboard that show relative dates like "2 years ago."



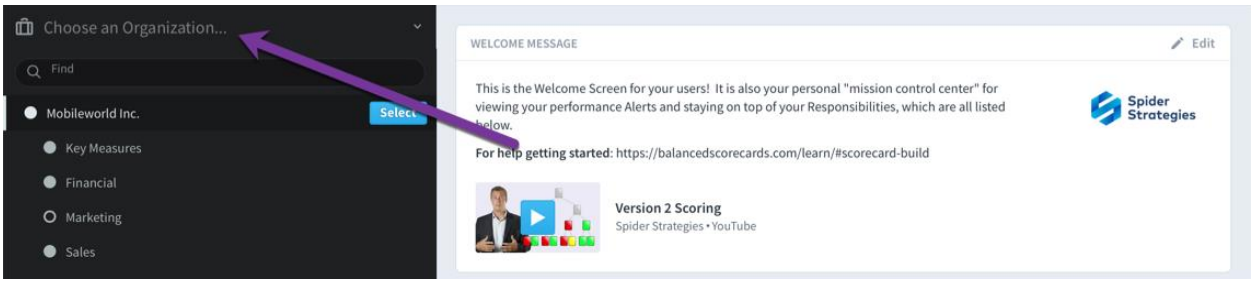
These relative dates work well in the app, but when they're exported to a static file, they can quickly become out of date. In version 3.3, all relative dates are converted to specific dates when they're exported.



Organizations

"Choose an organization..." message

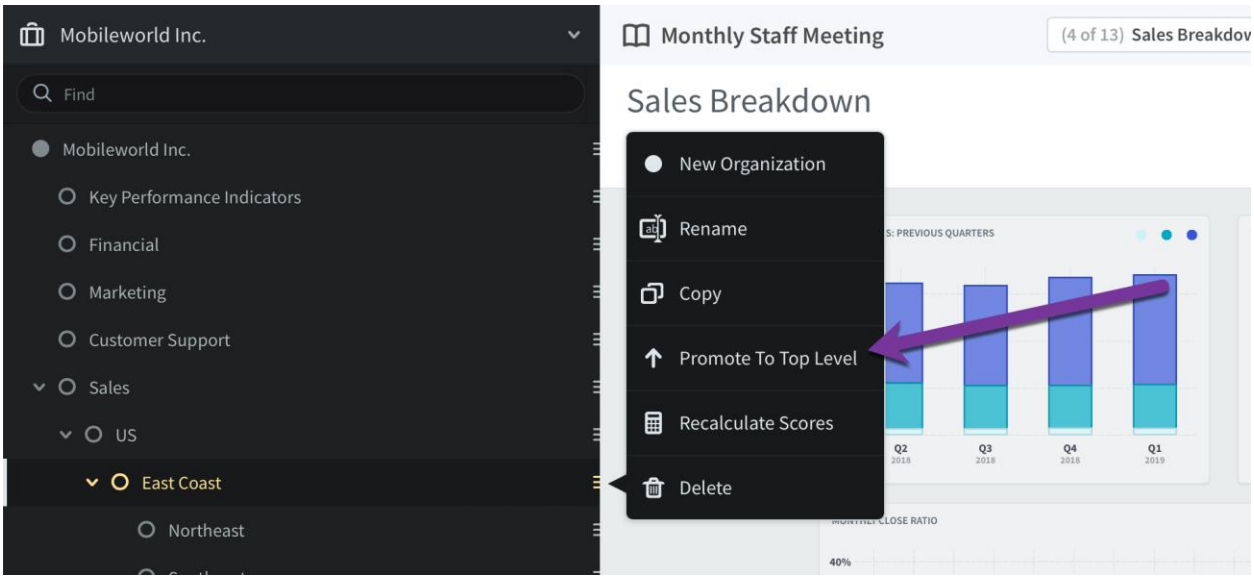
When Scoreboard first shows the organization selector after you've logged in, there is now a "Choose an Organization..." instruction on top of the tree to explain what's happening.



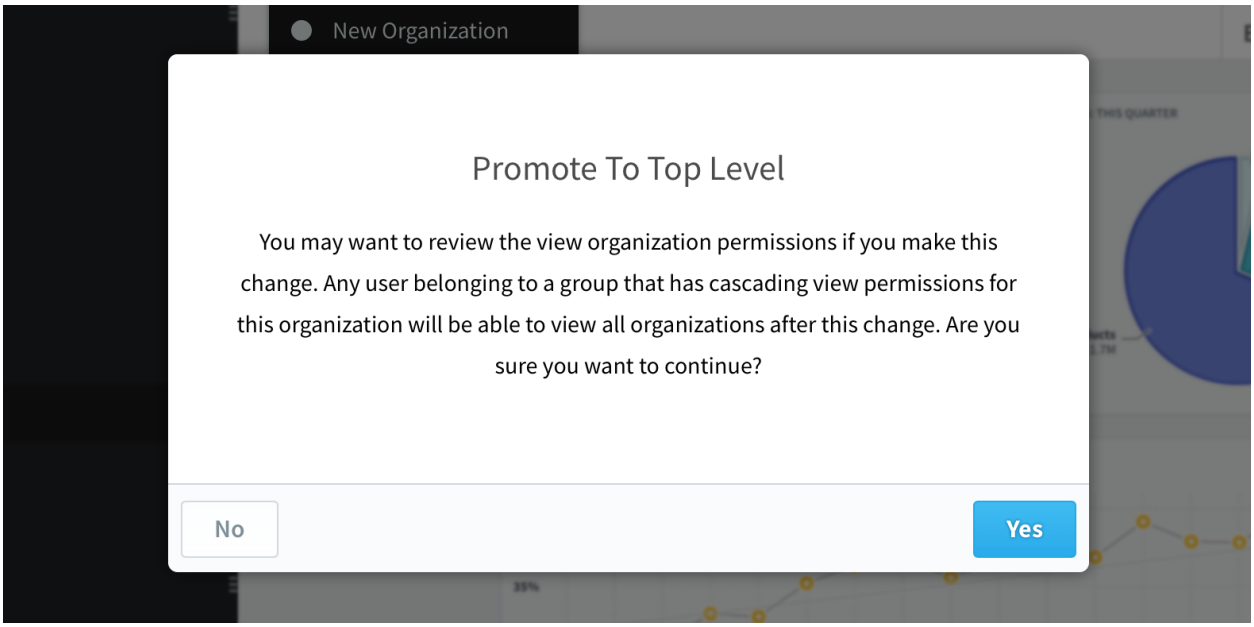
Promoting an organization to root is clearer

Administrators can reorder the organization tree by dragging and dropping items when it's in edit mode. The only tree item that can't be moved in this way is the organization root item.

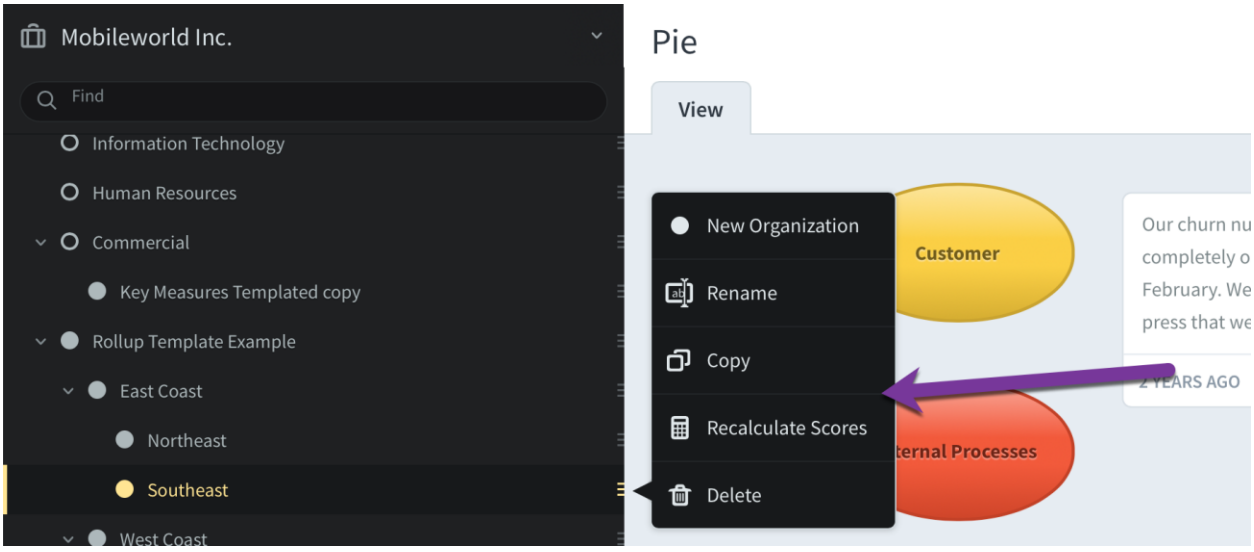
In previous versions of Scoreboard, there was a "promote to top level" item in the menu that allowed you to move an organization to the root item. The problem is that some people didn't understand that "top level" meant the root instead of one level higher.



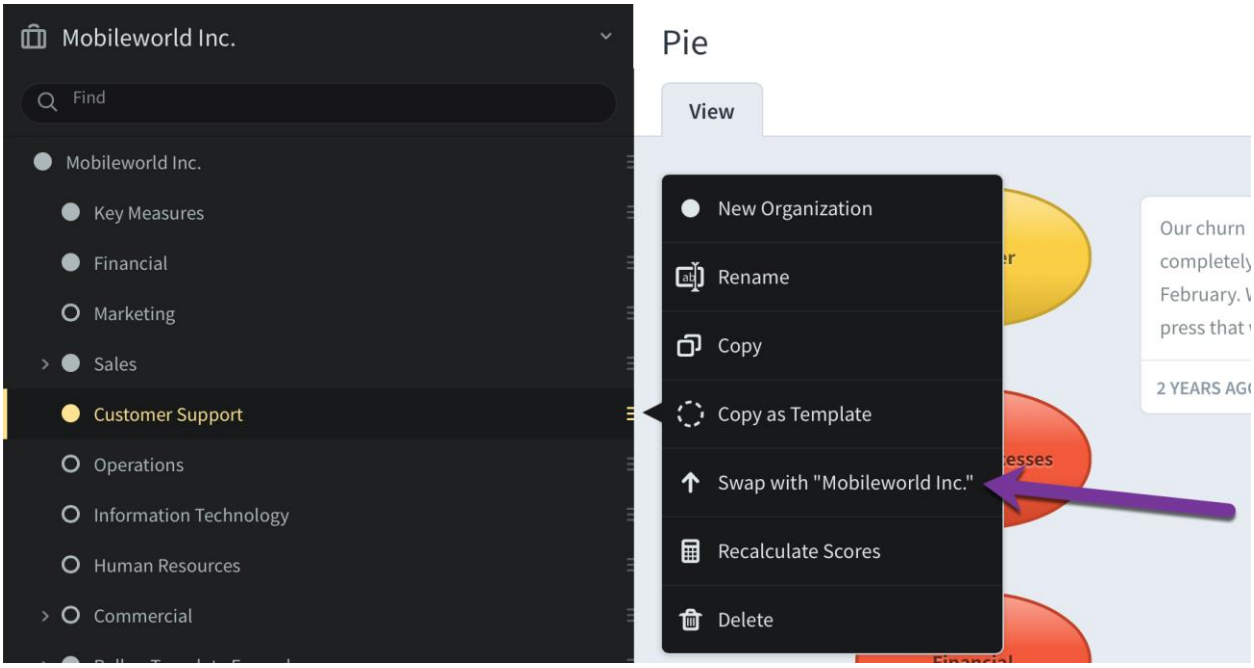
When you clicked "promote to root" you would see a confirmation dialog that looked like this.



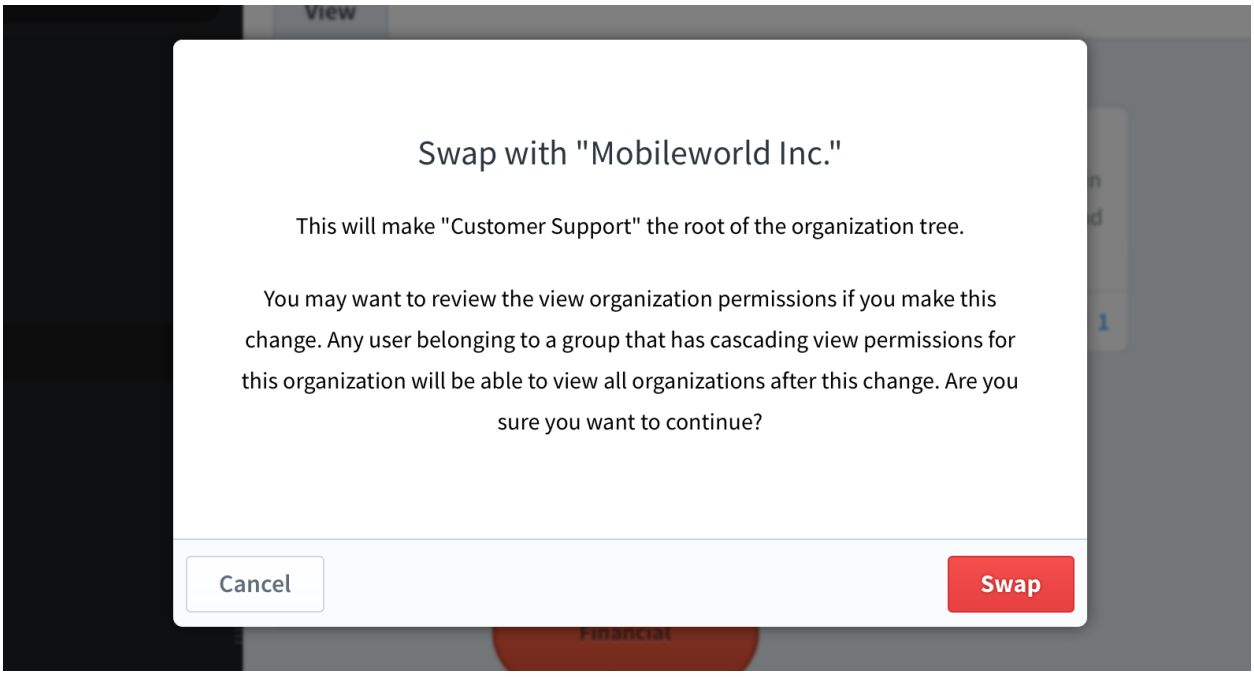
The "promote to root" flow has been redesigned in version 3.3 to avoid confusion and mistakes. There is no longer an option in the menu for organizations that aren't direct children of the root.



For direct children, the item has been renamed to, "Swap with X." This much more clearly explains what will happen, and makes it absolutely clear what will happen to the root item too.



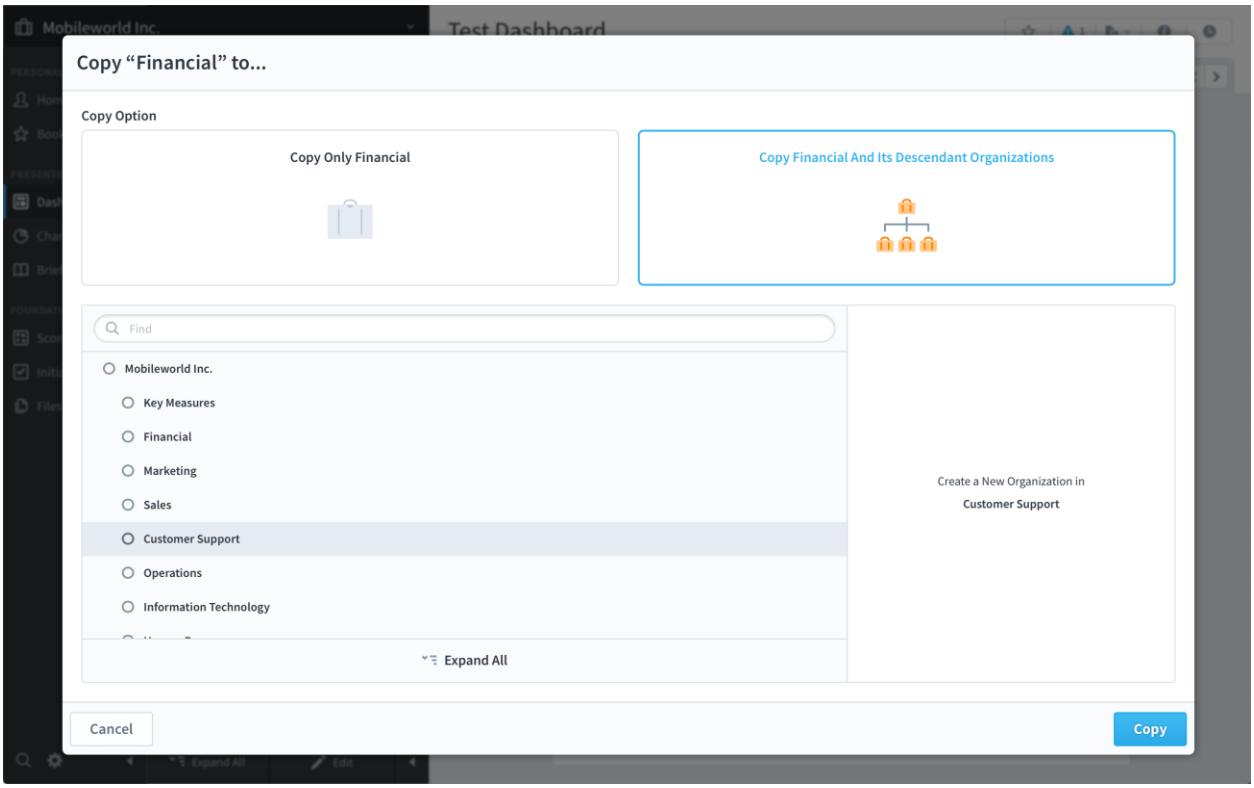
The confirmation dialog is also much clearer about what is happening. Finally, the red confirmation button is called "Swap."



Organization template copying

Version 3.3 now supports copying branches of the organization tree that contain templated relationships. If the template and one or more of its copies are contained in the structure being duplicated, Scoreboard will use the newly

created template as the source for the new copies. If the template is not part of the structure being copied, Scoreboard will continue using the old template for the newly created templated organizations.

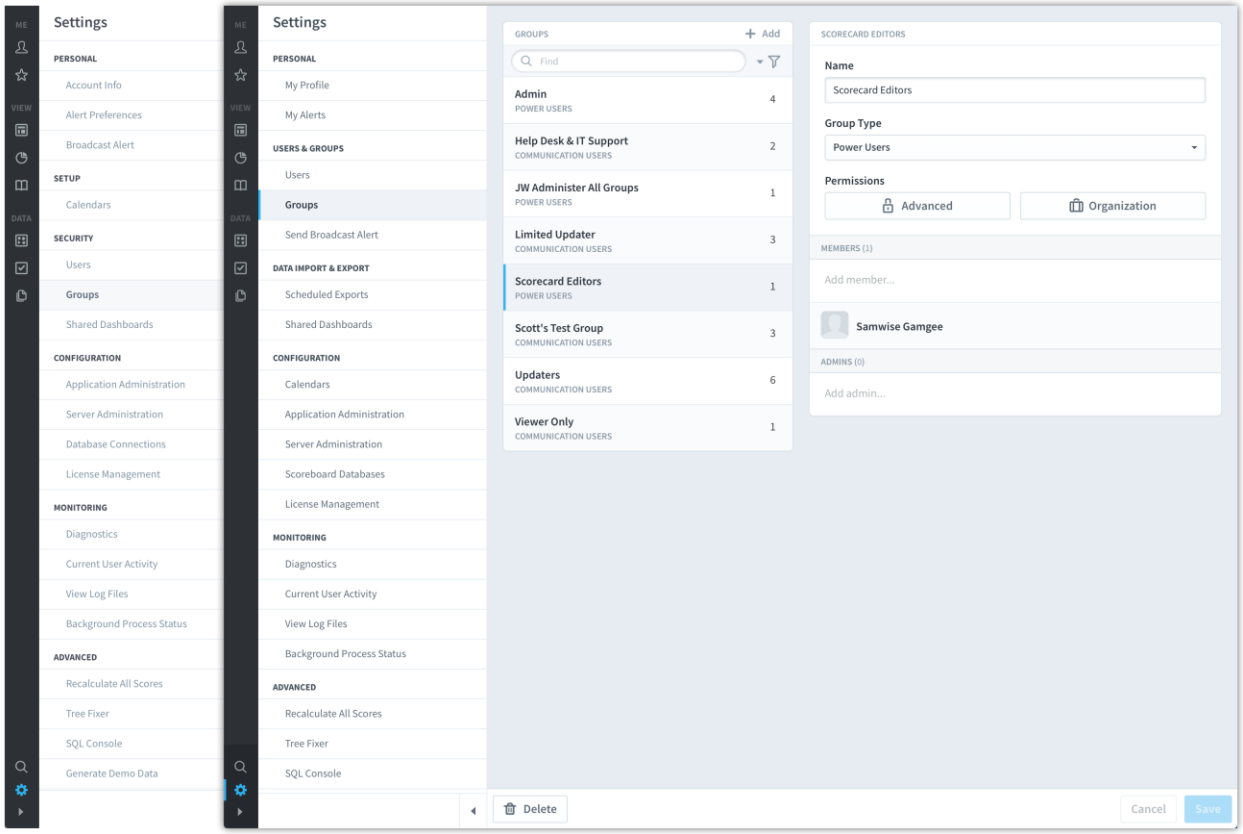


Administration

Reorganized Administration section

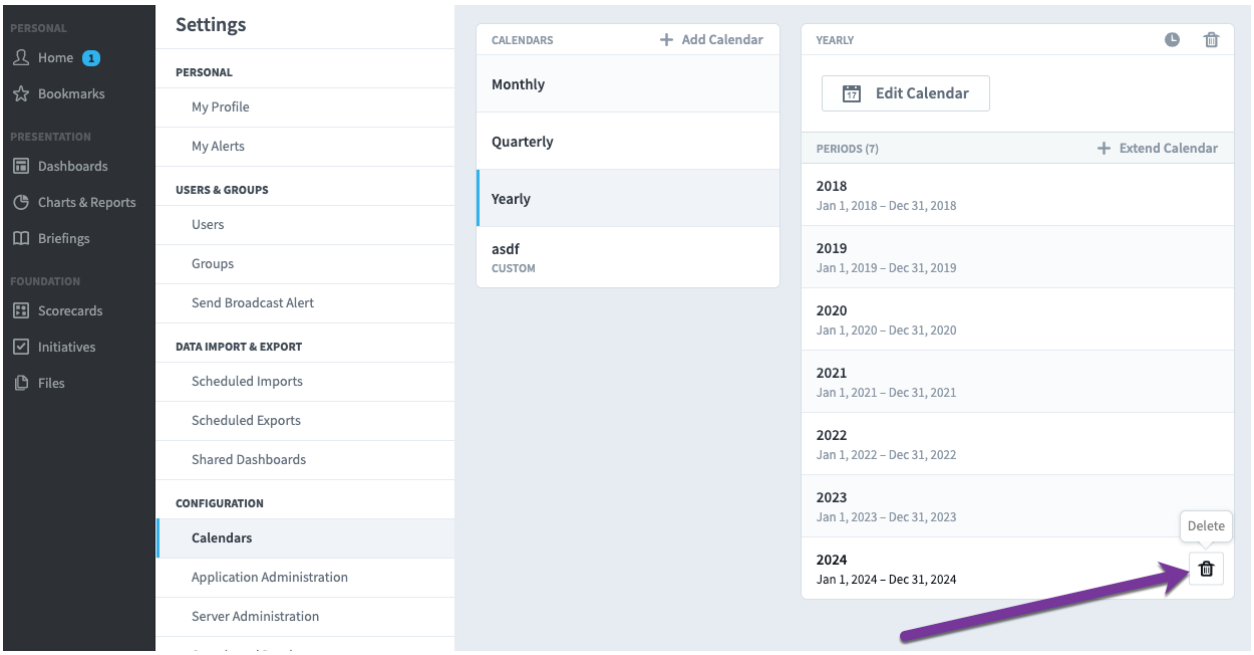
The administration section has been reorganized in version 3.3 to accommodate new sections and functionality. Several of the existing pages now have different names, and everything has been grouped into slightly different page categories.

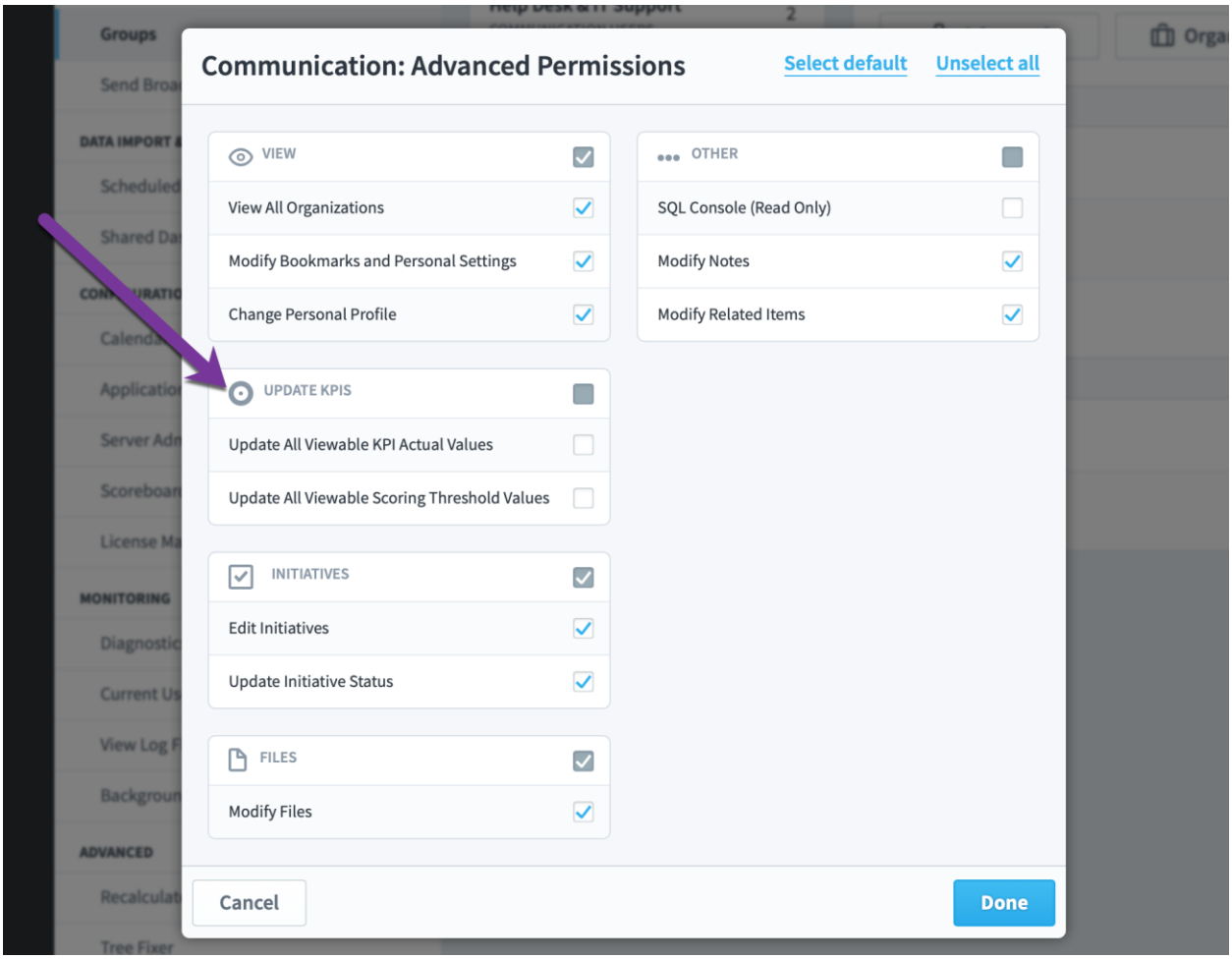
On the left is the administration section menu from before, and on the right is the administration section menu for version 3.3.



Deleting standard calendar periods

Administrators can now delete standard calendar periods in addition to custom calendar periods. This is useful when you have accidentally extended a calendar too far into the future.



Update all KPIs permission for communication users

You can now assign communication user groups the ability to update all of the KPIs they can view. They could be manually assigned as a KPI updater one at a time before, but this makes the process much easier when assigning all permissions.