Spider Strategies®

What's New in 5.7

Guide to new features in Spider Impact 5.7
Updated November 7th, 2024

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Your success is important to us!

Spider Impact 5.7 transforms how organizations visualize and interact with their strategic data. The headline feature is the complete overhaul of dashboard design capabilities with new shape and line widgets. These powerful tools allow you to create everything from strategy maps to process flows, bringing PowerPoint-style data visualization directly into your live dashboards. Every widget can now pull data from any source, breaking down the traditional barriers between scorecards, initiatives, and datasets.

Forms are more powerful than ever, with the ability to embed live dashboards and use tabbed navigation for intuitive data collection. Reports gain new capabilities like showing related items and improved conditional formatting, while initiatives now support yellow ranges for a more nuanced view of project health. The release also introduces full support for right-to-left languages like Arabic, making Spider Impact more accessible to organizations worldwide.

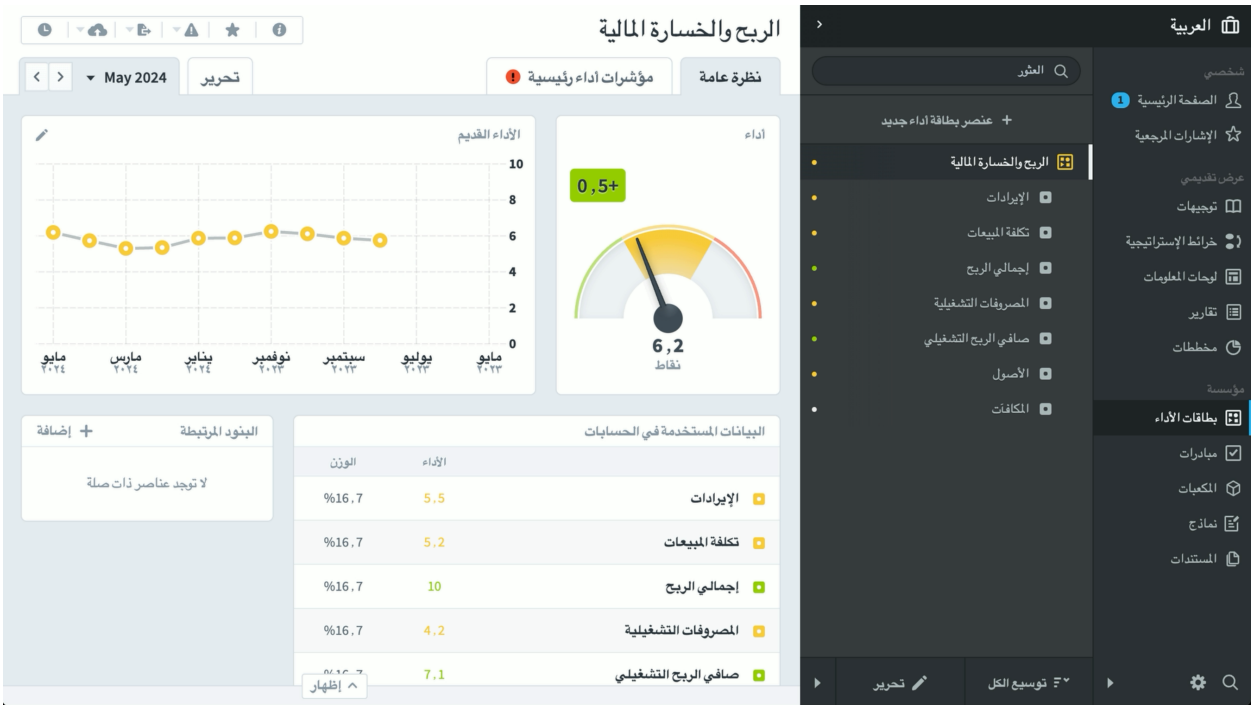
Beyond these major features, version 5.7 refines virtually every part of the application. From improved chart labeling to enhanced data import capabilities, it's an update that makes Spider Impact both more powerful and more intuitive to use.

To help you discover everything Spider Impact has to offer, we have free training videos on our website, and we've put together new functionality guides like this one. If you want to maximize your return on investment, we offer paid formal training courses and dedicated consulting engagements. We have more information about all our free and paid services at https://www.spiderstrategies.com/services/

App-Wide Settings

Full support for right-to-left languages

Spider Impact 5.7 now fully supports right-to-left languages like Arabic. When your browser is set to use a supported right-to-left language, the application layout completely changes, showing the dark navigation on the right and the light information display on the left. This new layout affects the entire application, including manual layouts like reports and dashboards.

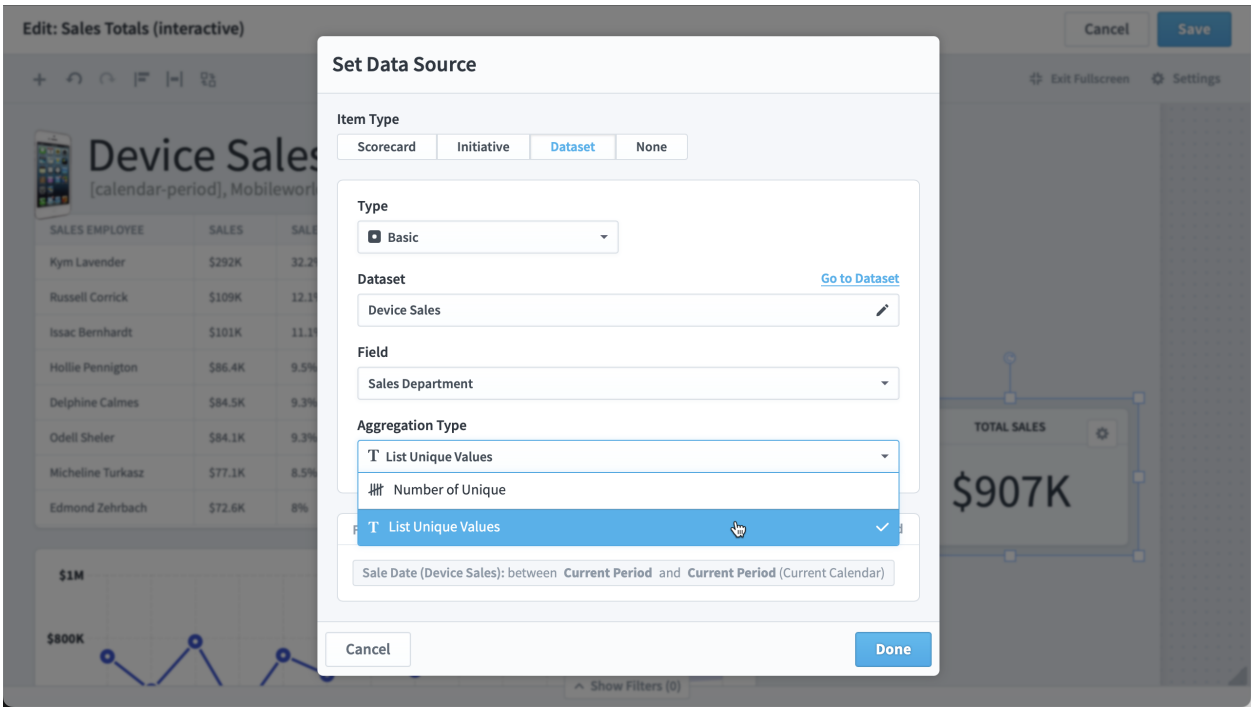


“List Unique Values” aggregation type

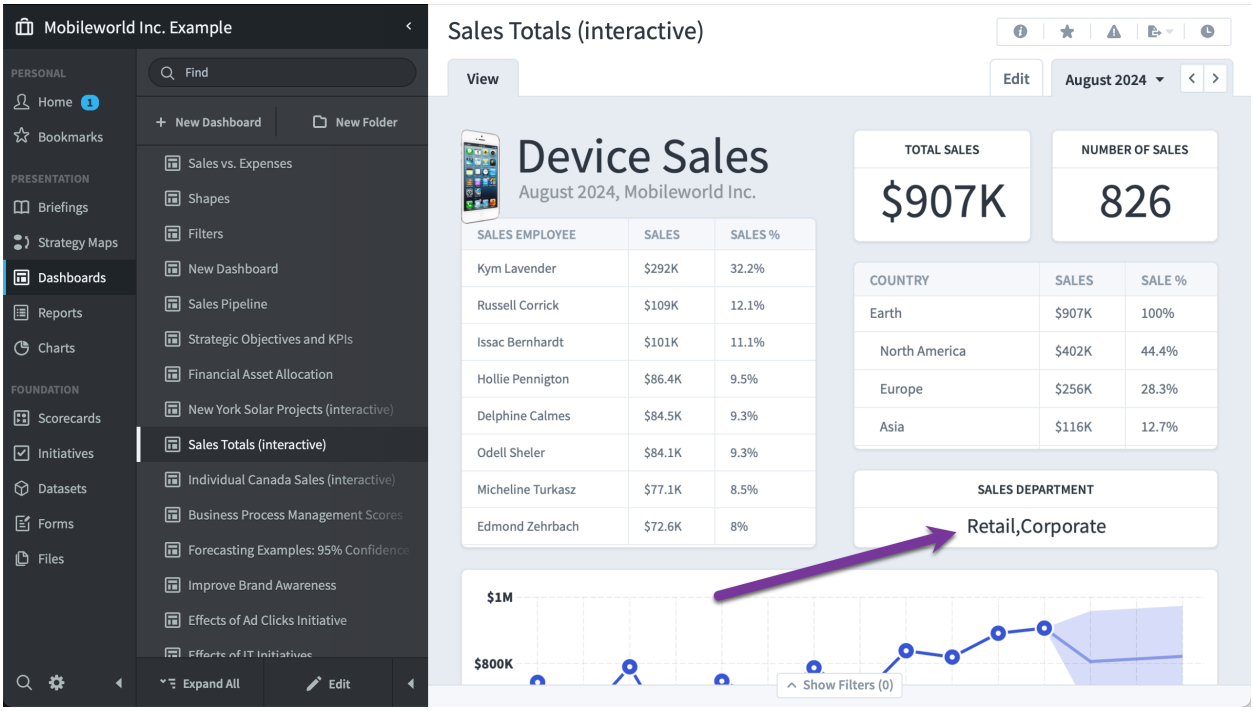
Historically, when aggregating multiple text values together, the only option was “Number of Unique”, which would count the number of unique values. The one exception was scorecard reports, which also had a “List Unique Values” aggregation type. This would list the unique values, separated by commas.

This “List Unique Values” aggregation type is now available throughout the application in places where you could only choose “Number of Unique” before. This including all reports, dashboard widgets, and form widgets.

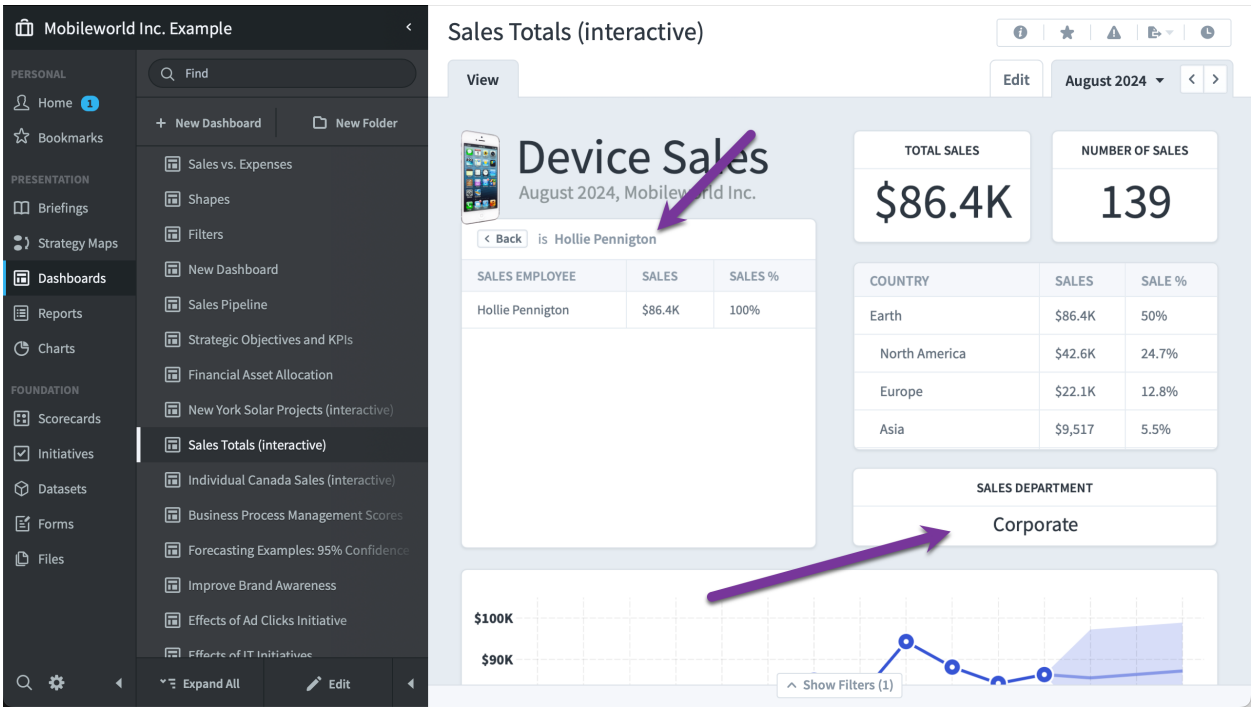
In this example we’re choosing to “List Unique Values” on a dashboard widget.



The dashboard widget now shows both unique Sales Department values for device sales, which are Retail and Corporate.



When we click on a specific employee to filter the results, the Sales Department now only shows Corporate, because that employee only had Corporate sales.



Here's another example showing how numbers can also be aggregated using "List Unique Values". Here we have a dataset table showing pay grade in the first column, while the second column is aggregating unique "age at the time of incident" values from a linked dataset.

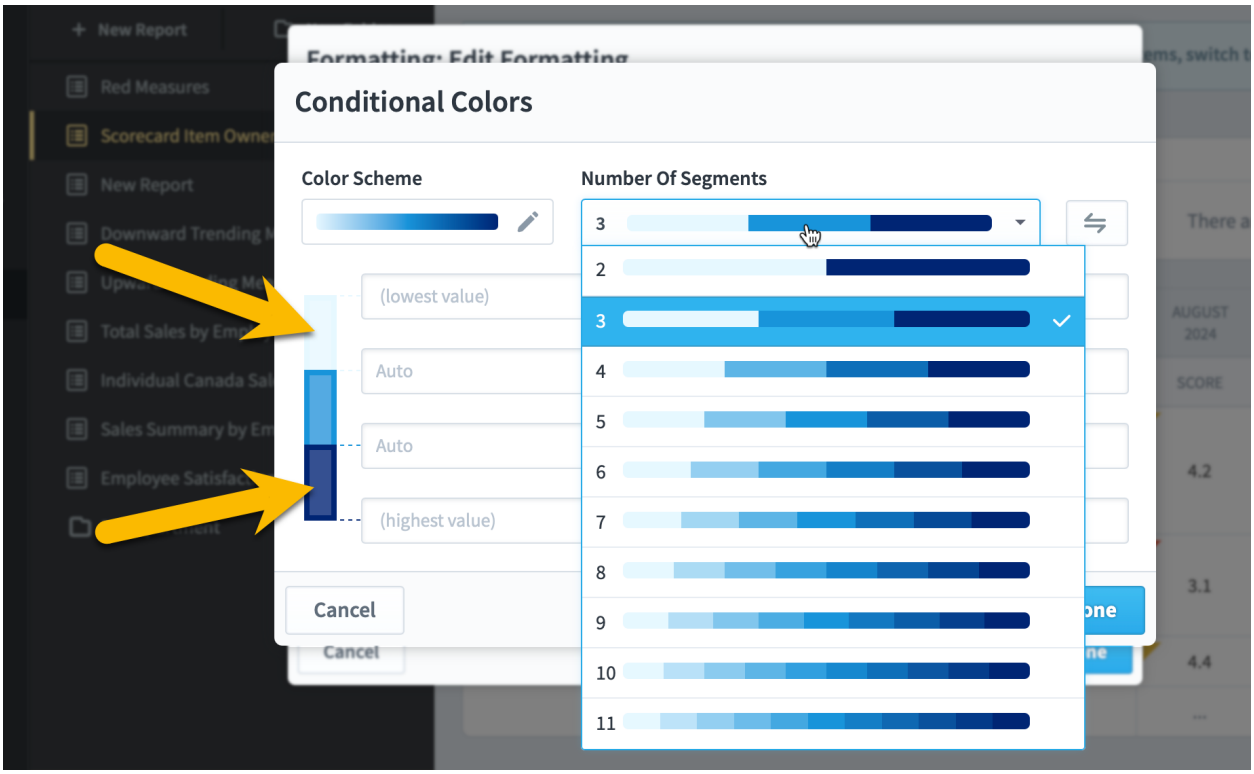
PAY GRADE

PAY GRADE	AGE AT THE TIME OF INCIDENT	NUMBER
C-1	***Blank***, 20, 21	3
C-2	21, 20, 19, 18	10
C-3	18, ***Blank***, 19, 20, 21	11
C-4	18, 19, 20	8
E-1	18, 19, 20, 21, 17, 22, 23, ***Blank***, 25, 26…	297
E-2	19, 18, 20, 21, 22, ***Blank***, 17, 26, 23, 24…	371
E-3	19, 20, 21, 23, 18, 22, 24, 25, ***Blank***, 26	537

Note that while "List Unique Values" can be used for data display, it cannot be used to aggregate linked dataset records in dataset field equations.

Better conditional scoring colors

Conditional coloring is used in places like reports, charts, and shapes to color things based on numerical values. The software chooses colors at the extreme ends of the color range for maximum contrast between the segments. For example, regardless of how many segments you choose in this blue color scheme, the first segment is always the lightest color possible, and the last segment is always the darkest color possible.



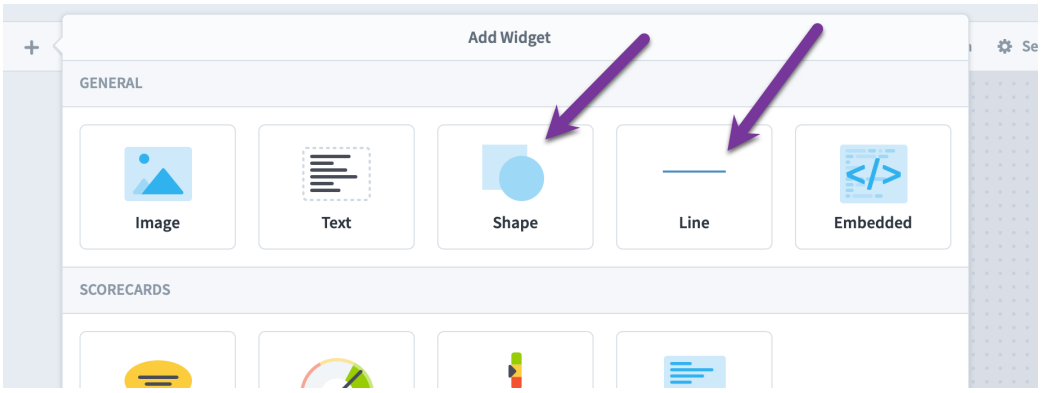
This approach to coloring the segments works well for all color schemes except the red to green scoring. As you can see in the 3-segment example below, colors at the extreme ends of the color range produce reds and greens that are too dark. Because of this, the software now shows standard impact scoring colors when there are 5 or fewer segments of the scoring conditional color scheme.

Dashboards

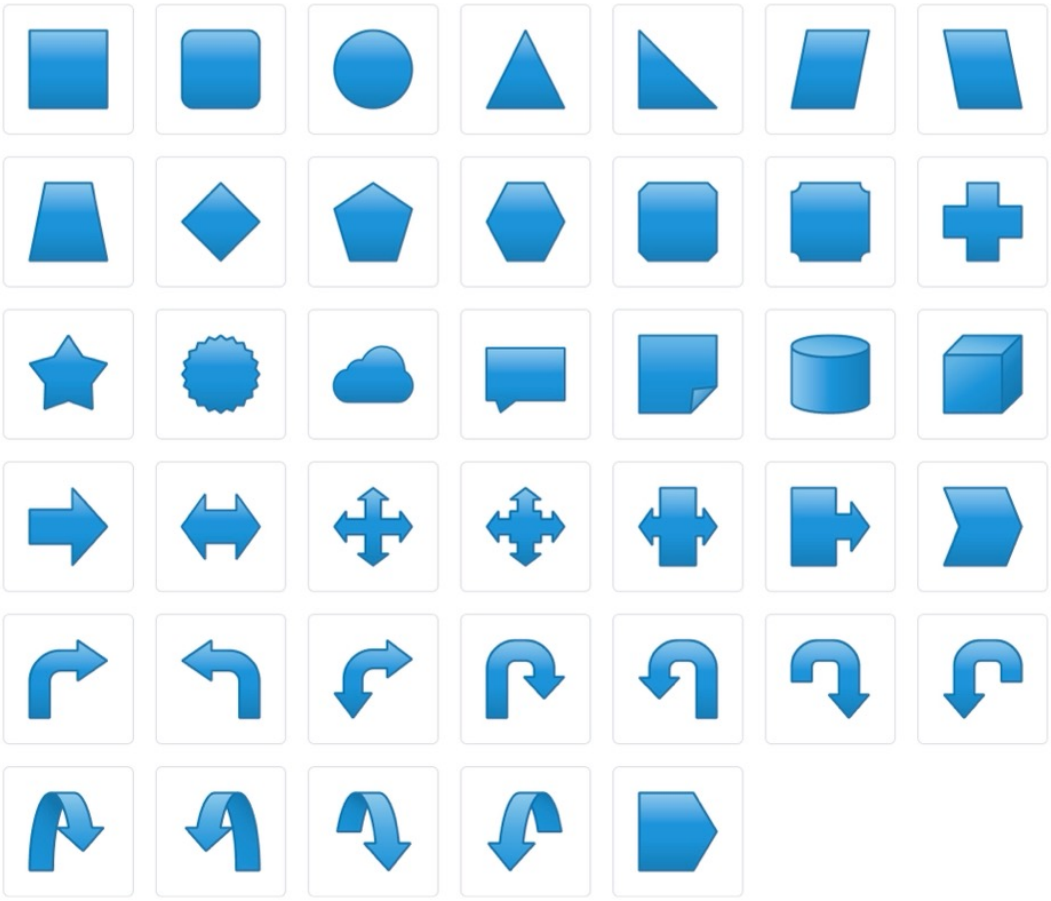
Shape and line widgets

New shape types

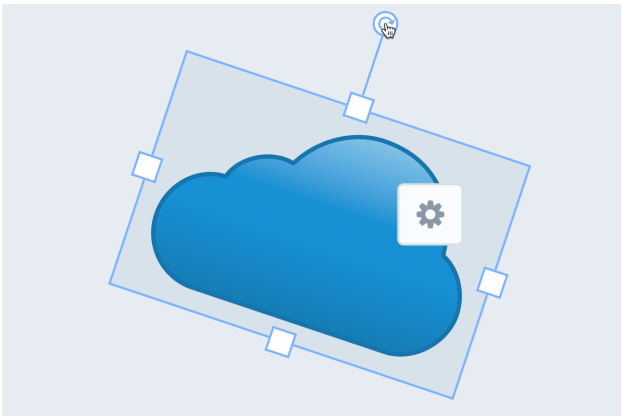
There are two new General widget types when adding widgets to a dashboard: Shape and Line.



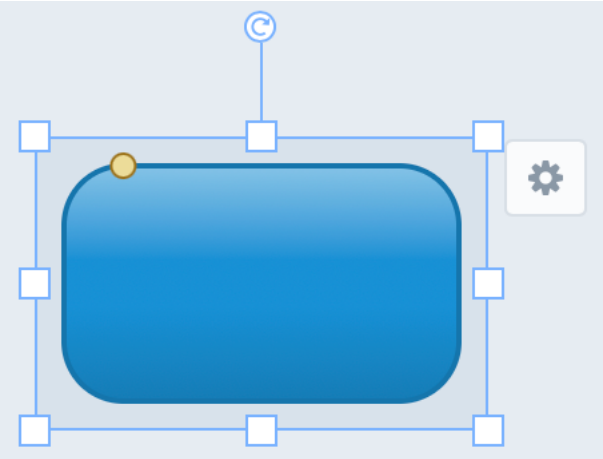
Choosing "Shape" allows you to add one of 40 shapes to your dashboard.



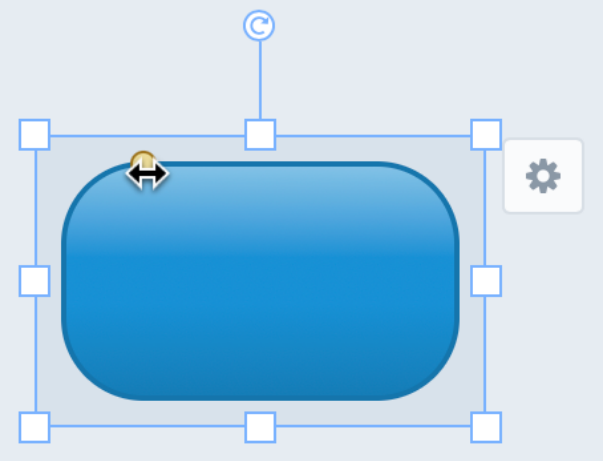
These shape widgets can be resized, moved, and rotated.



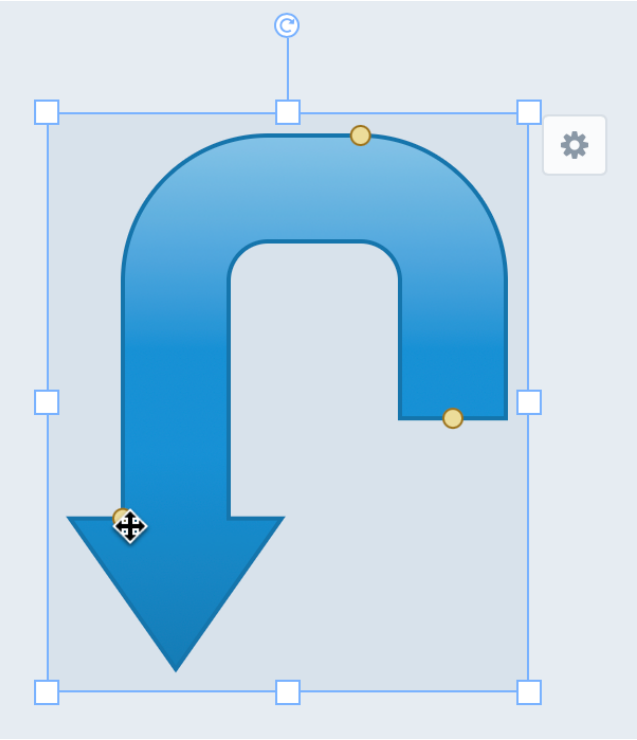
Many shape widgets have additional yellow handles to further adjust their appearance. For example, the rounded rectangle shape has a yellow handle near its corner.



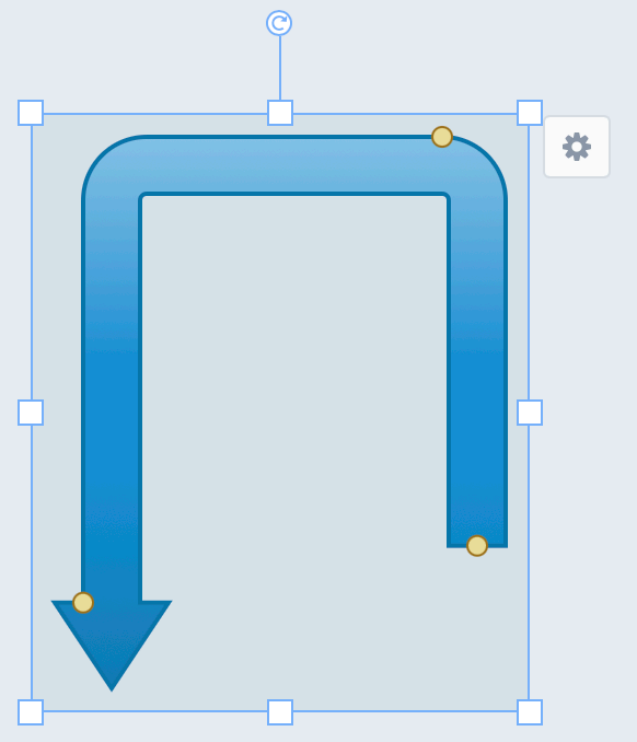
Dragging it horizontally changes its corner radius.



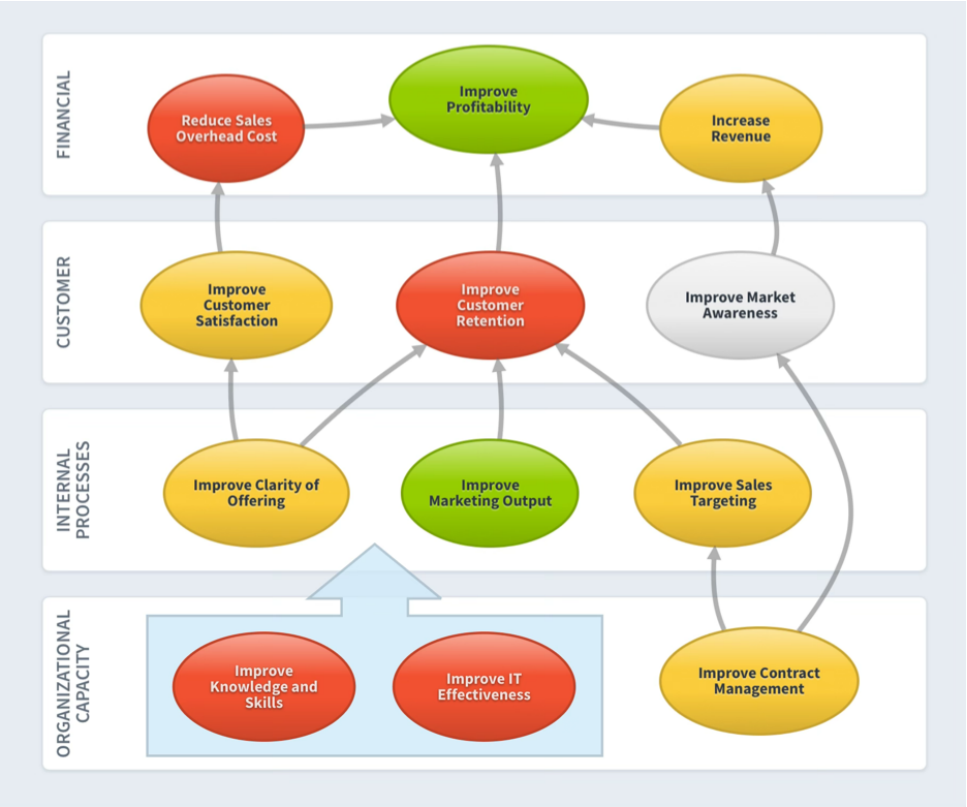
More complex shapes like this U-turn arrow have as many as three yellow handles.



Here we've modified the arrow to be narrow with sharp turns.

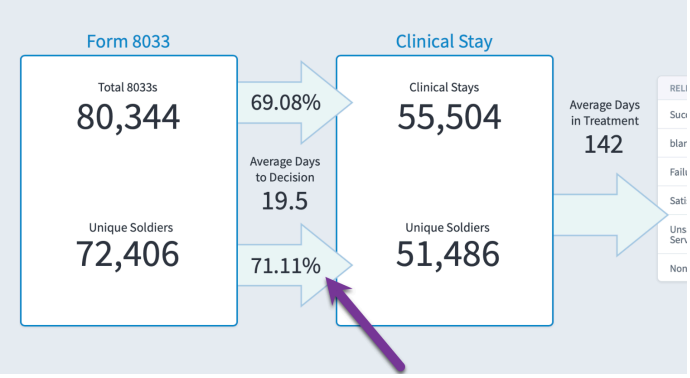


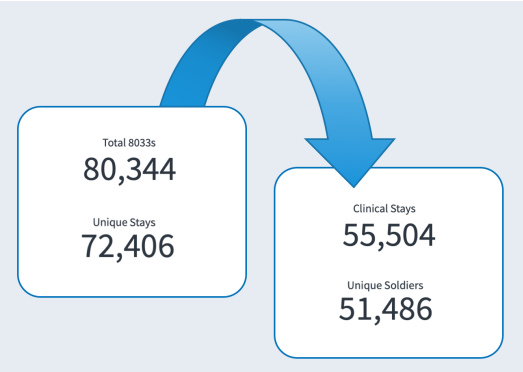
These new Shape widgets open the door to an entirely new category of data visualization that can closely match PowerPoint slides. For example, you can create strategy maps with shapes grouping bubbles like this.



Or dashboards with translucent bubble containers like this.

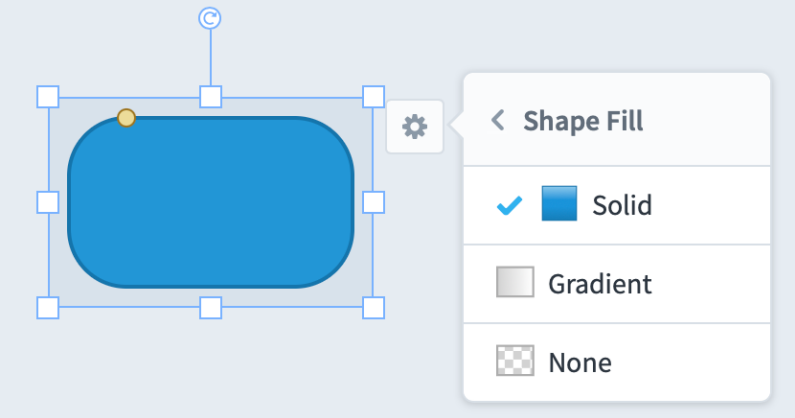
Or flow diagrams showing values at various stages of a process like this.



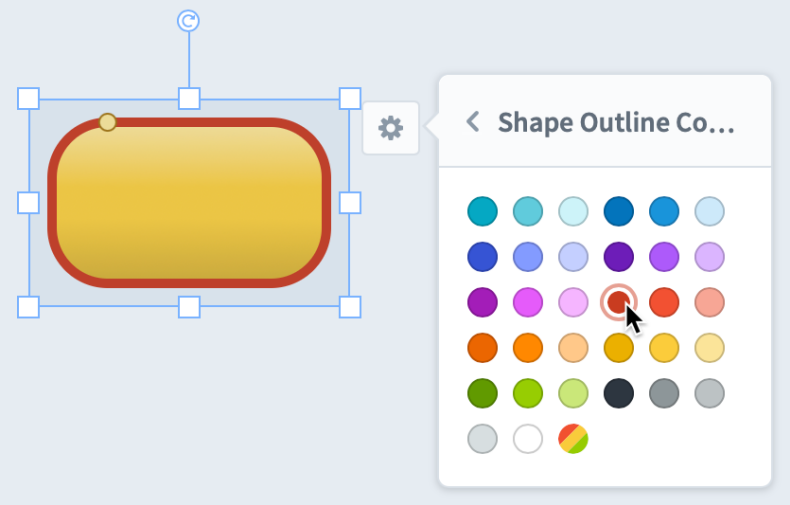


Setting fill, outline, and opacity

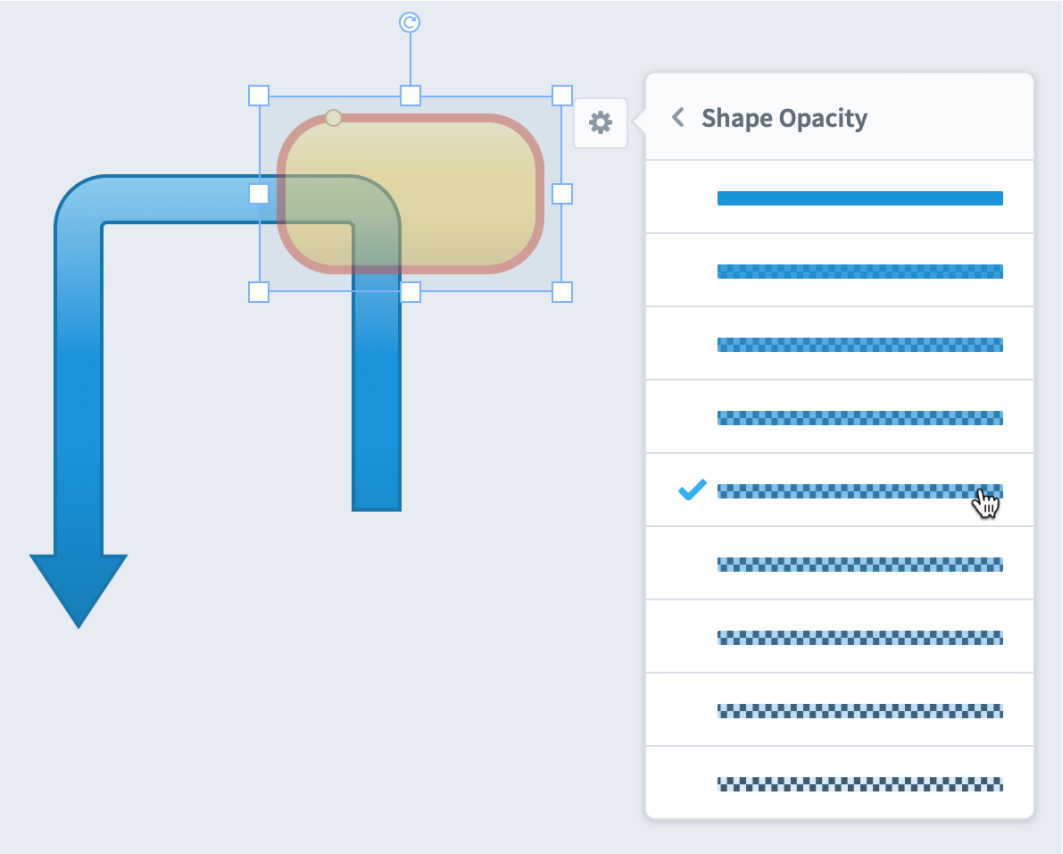
You have complete control over the appearance of shape widgets. Here we've changed to a solid fill instead of gradient.



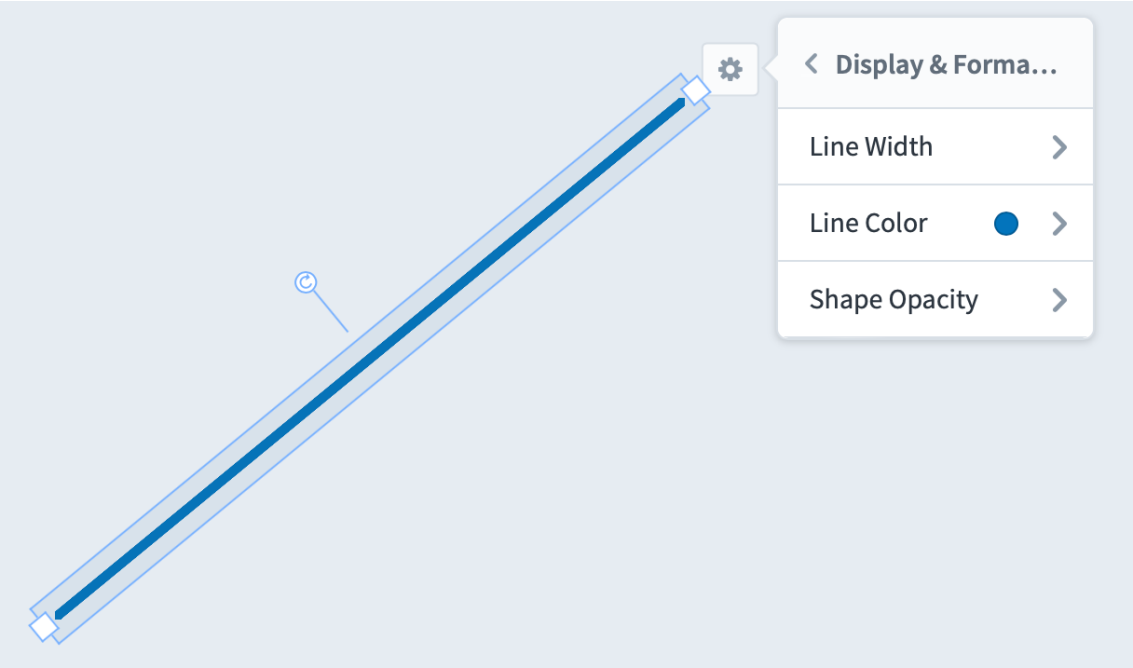
You can manually choose the fill color, outline color, and outline thickness.



You can even set the shape opacity, creating see-through objects or containers.



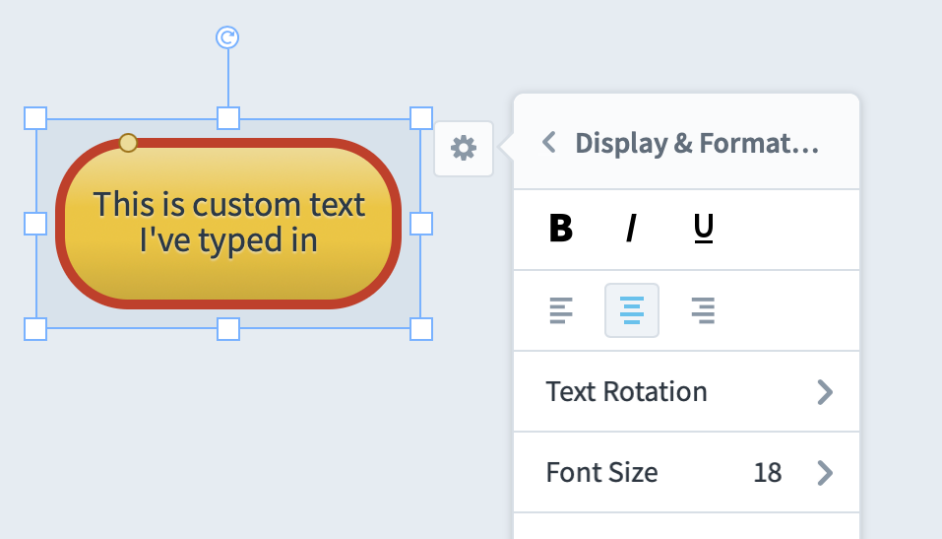
Lines are similar to shapes, with formatting options like line thickness, color, and opacity.



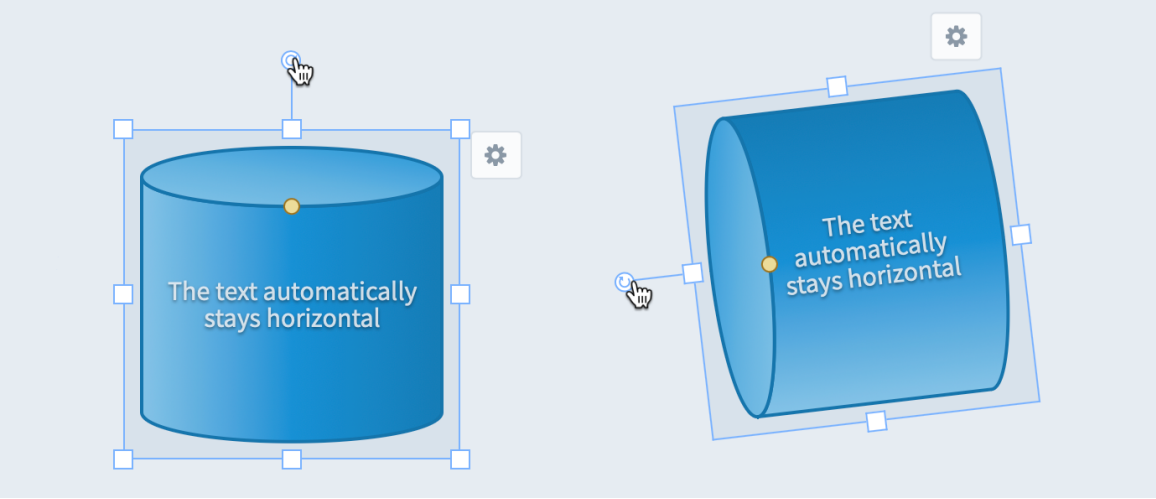
Setting and configuring text

You can choose to add text to shape widgets. You also have a variety of text formatting options including:

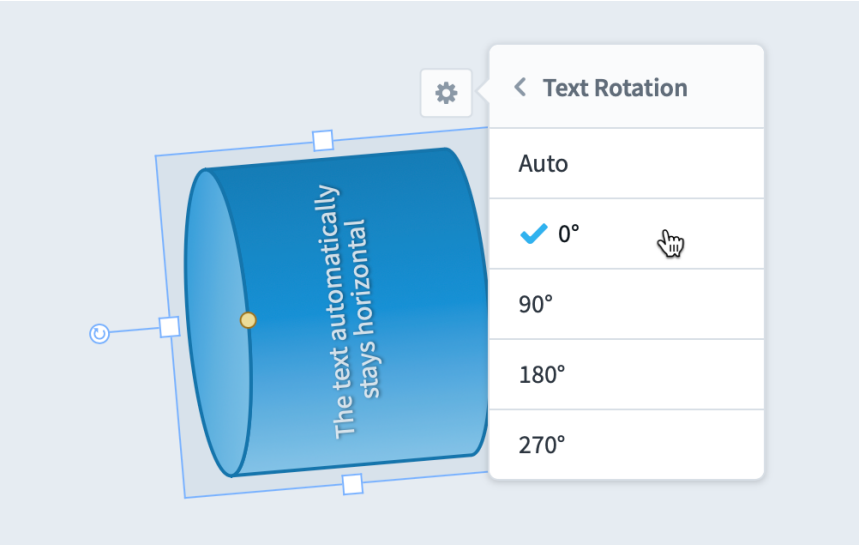
- Bold
- Italic
- Underline
- Align left, center, or right
- Font size



Text rotates along with the shapes, automatically snapping to 90 degree increments to maximize readability.

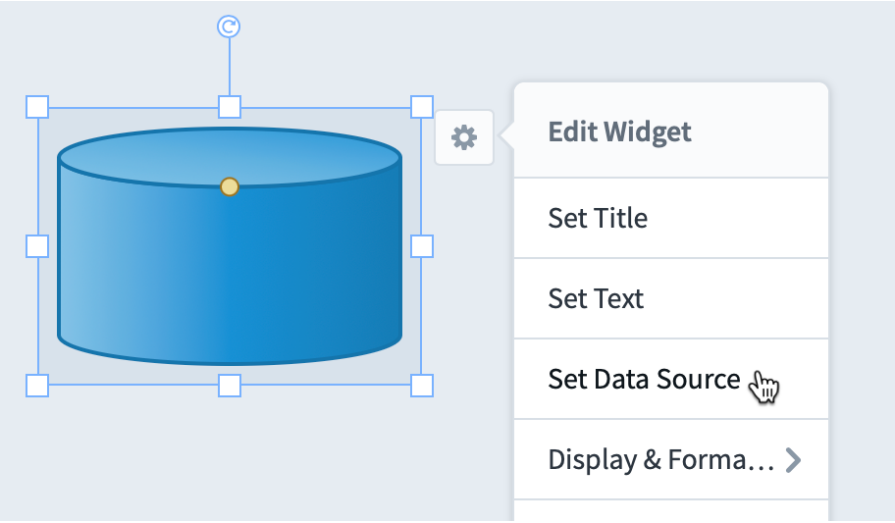


You can override this Auto text rotation, however, choosing static text rotation at 90 degree increments.

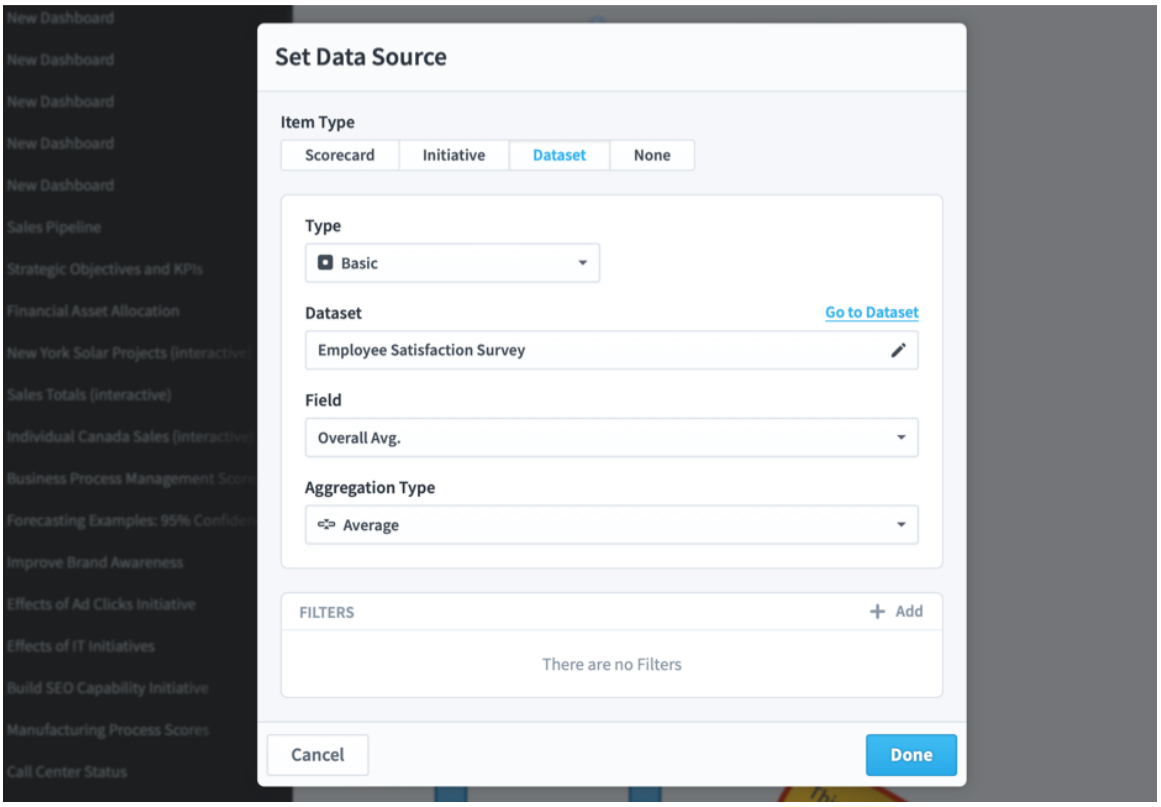


Setting data source

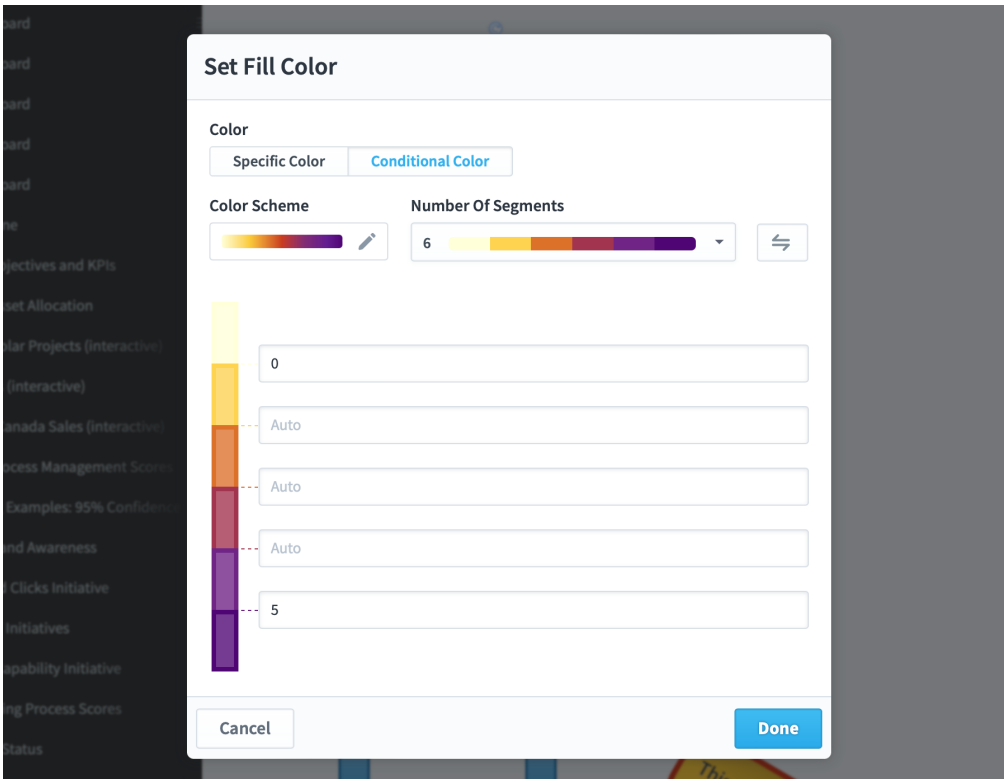
Shape widgets come alive when you wire them up to data.



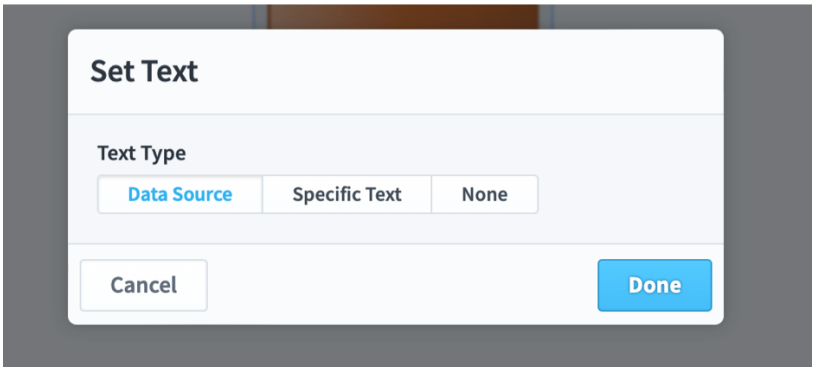
In the Set Data Source menu you can change the shape's data source from "None" to a scorecard, initiative, or dataset value. Here we've decided to use a dataset value: the average employee satisfaction survey result.



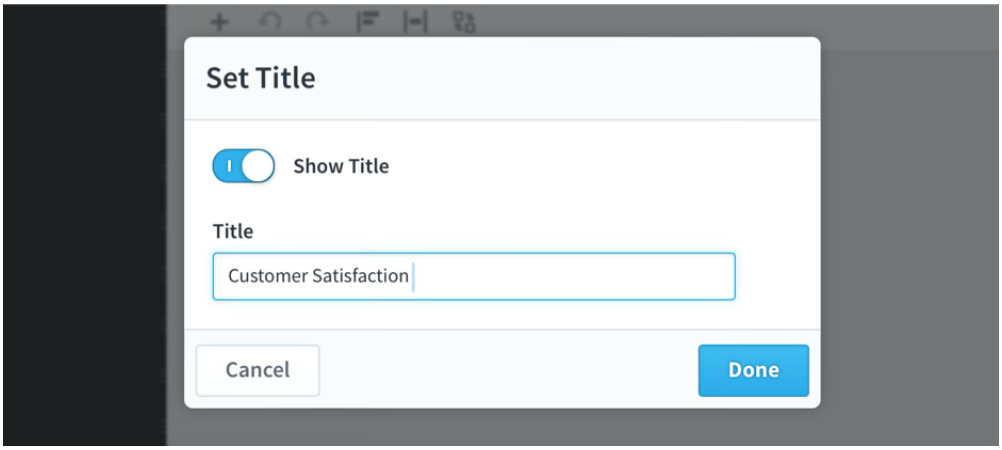
And, instead of showing a specific color, we'll change this shape's color to be conditional based on the dataset value. We've chosen a heat map color scheme with evenly sized segments for customer satisfaction scores between 0 and 5.



We'll also change the text on the shape from "Specific Text" to "Data Source", which will show the customer satisfaction score from the dataset.



Finally, we'll set the shape widget's title to "Customer Satisfaction".



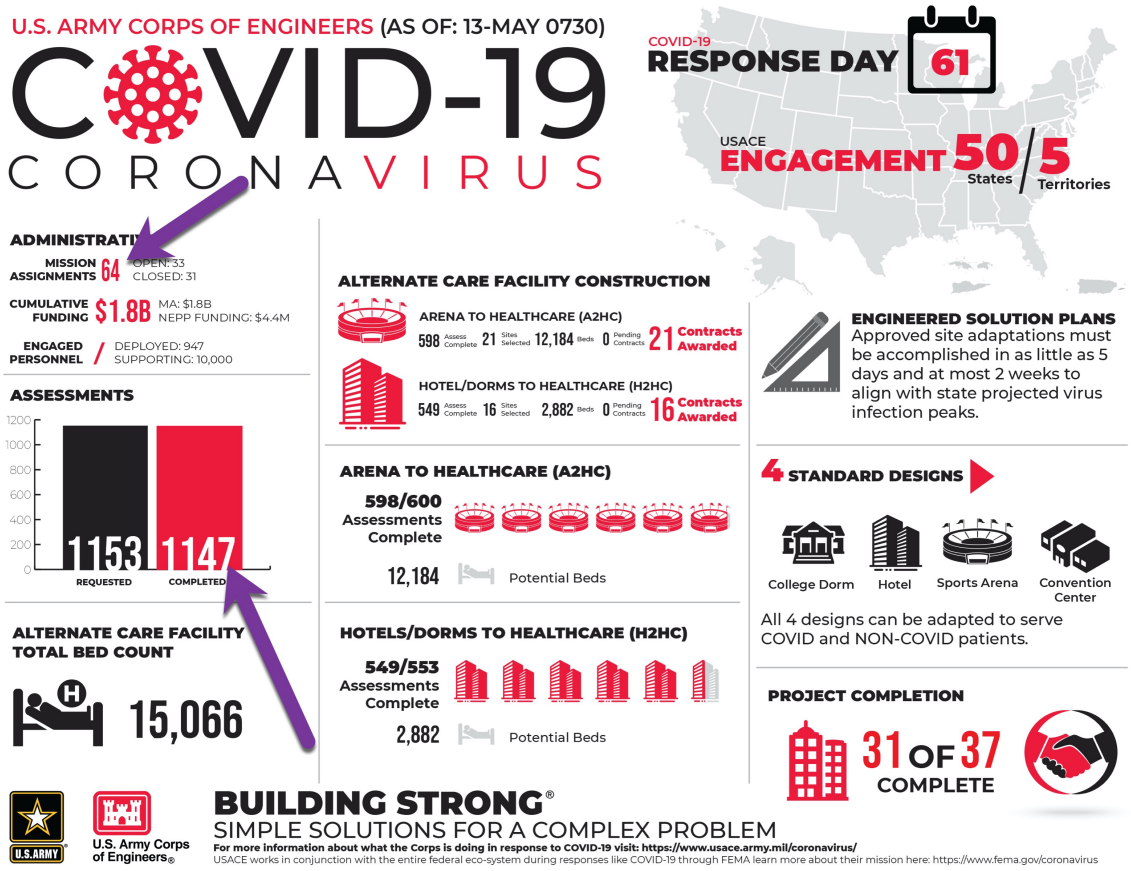
When we're done, we have a dynamically colored shape that shows a dataset value.

When shape widgets are connected to data, the display options don't stop there. Here we've turned off both the shape's fill and outline, using the conditional color for the text.

Turning on the widget background displays our value exactly like the existing dataset single value widget, except the text is dynamically colored based on the value.

Finally, we'll turn the background and title off, and choose a specific color for the text.

Statically colored values like this allow us to create infographic-style dashboards where the dynamic number is always red in one place and always white in another.



Trend arrows

When a shape widget uses a scorecard item as its data source, there is the option to turn on a trend arrow to show how performance has changed since the previous period. This trend arrow is always placed in the upper left corner.

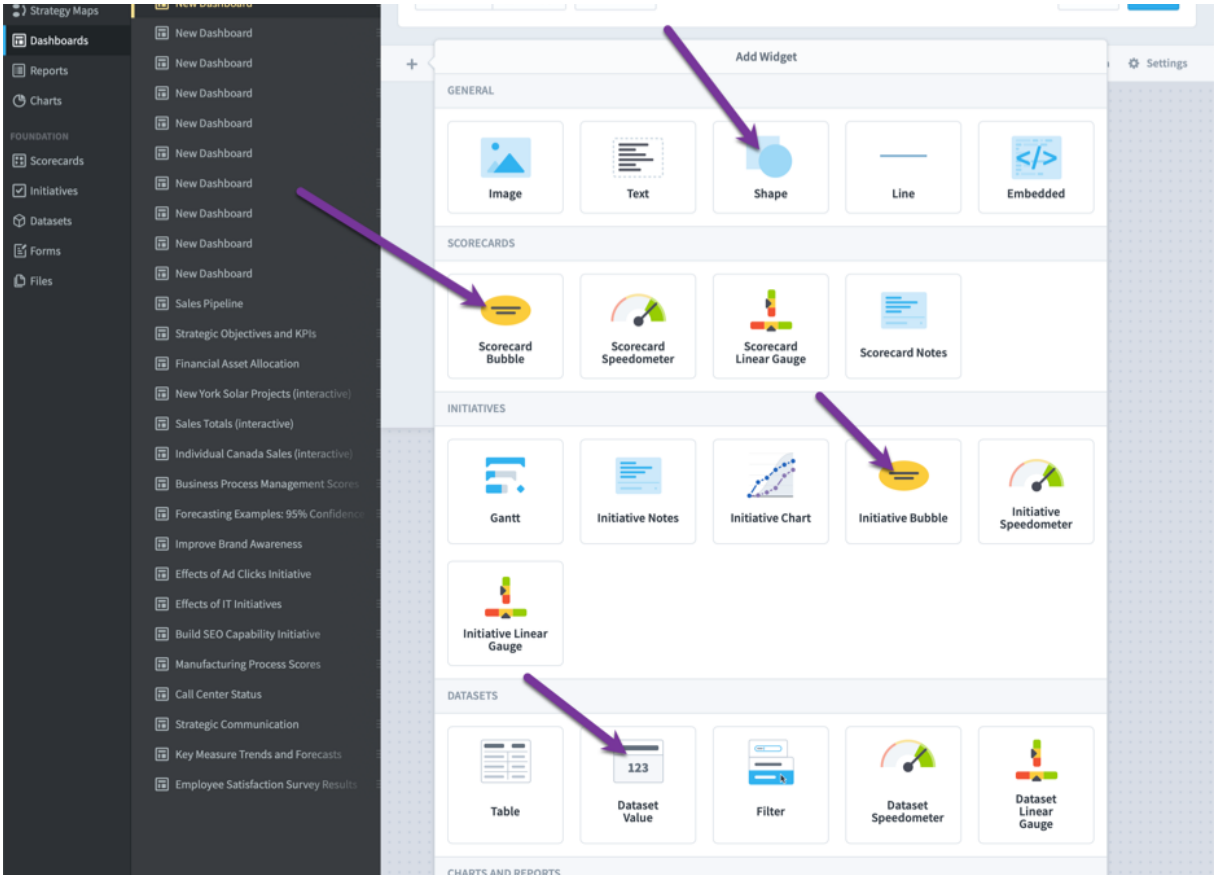
Merged bubble & dataset value widgets

Historically, dataset single value widgets could only show dataset values, and performance bubble widgets could only show scorecard values. And, although there was a fair amount of functionality overlap between the two, both widget types had unique formatting options.

As shown in the examples above, that is no longer the case. There is now one unified widget that can show data from any source (including no source) with display options so flexible that it can do everything the old widgets could do and more.

The Add Widget menu continues to show separate options, however:

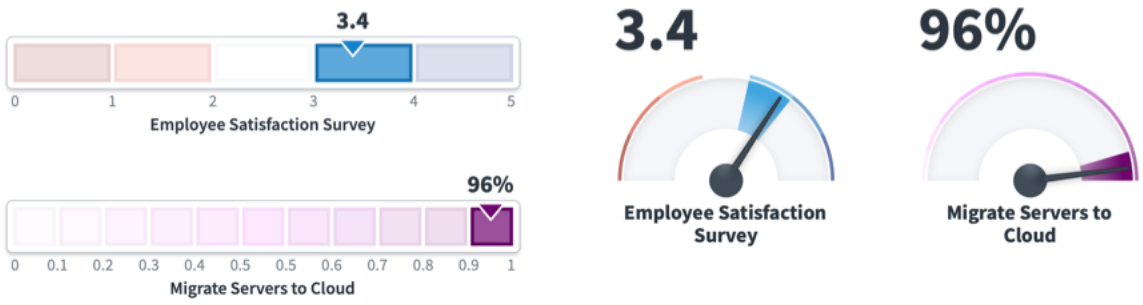
- Shape
- Scorecard Bubble
- Initiative Bubble
- Dataset Value



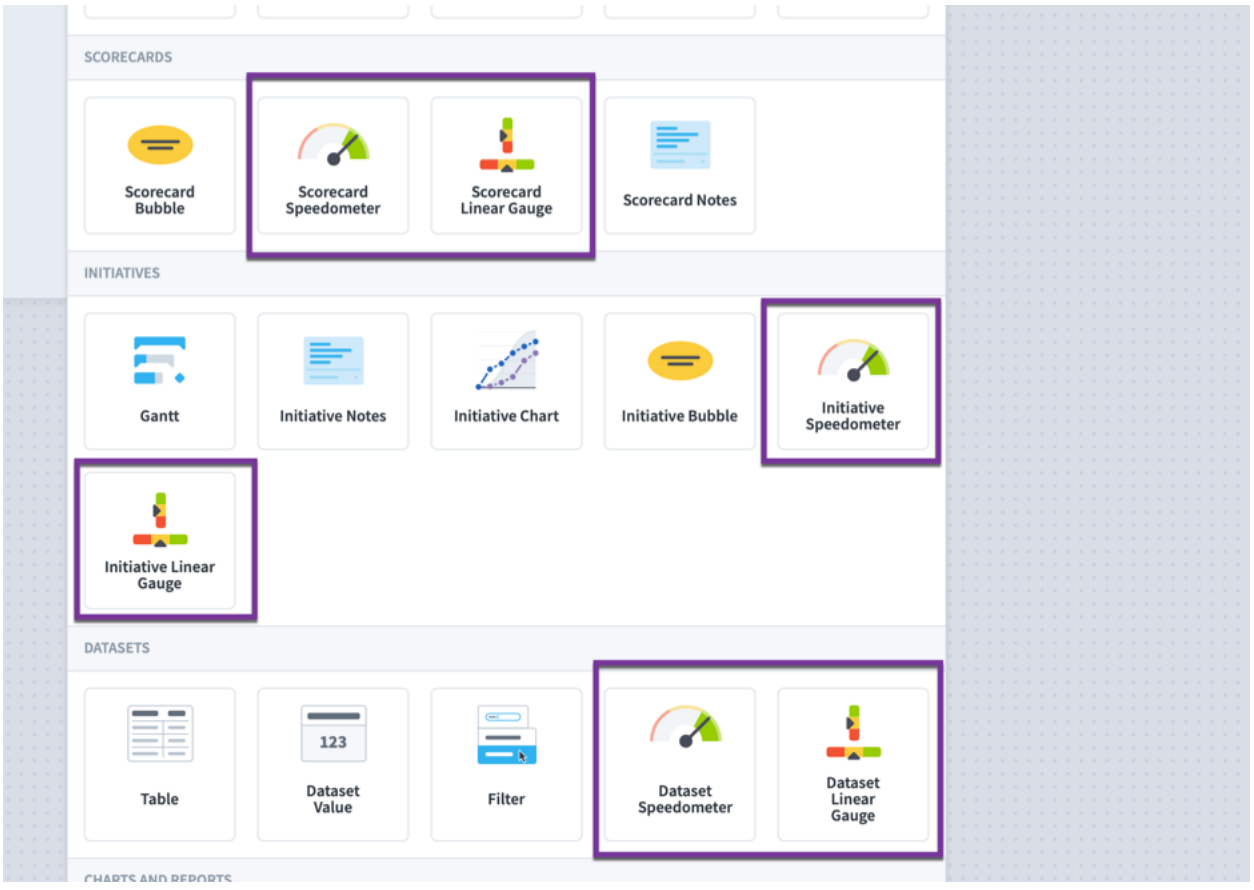
This allows single-value widgets to be quickly added to dashboards with formatting options optimized for each data source.

Speedometers and gauges show any value

Just like single value widgets, speedometers and linear gauges can now show data from any data source. When the data source is a dataset or initiative, dashboard designers choose conditional coloring schemes and thresholds.

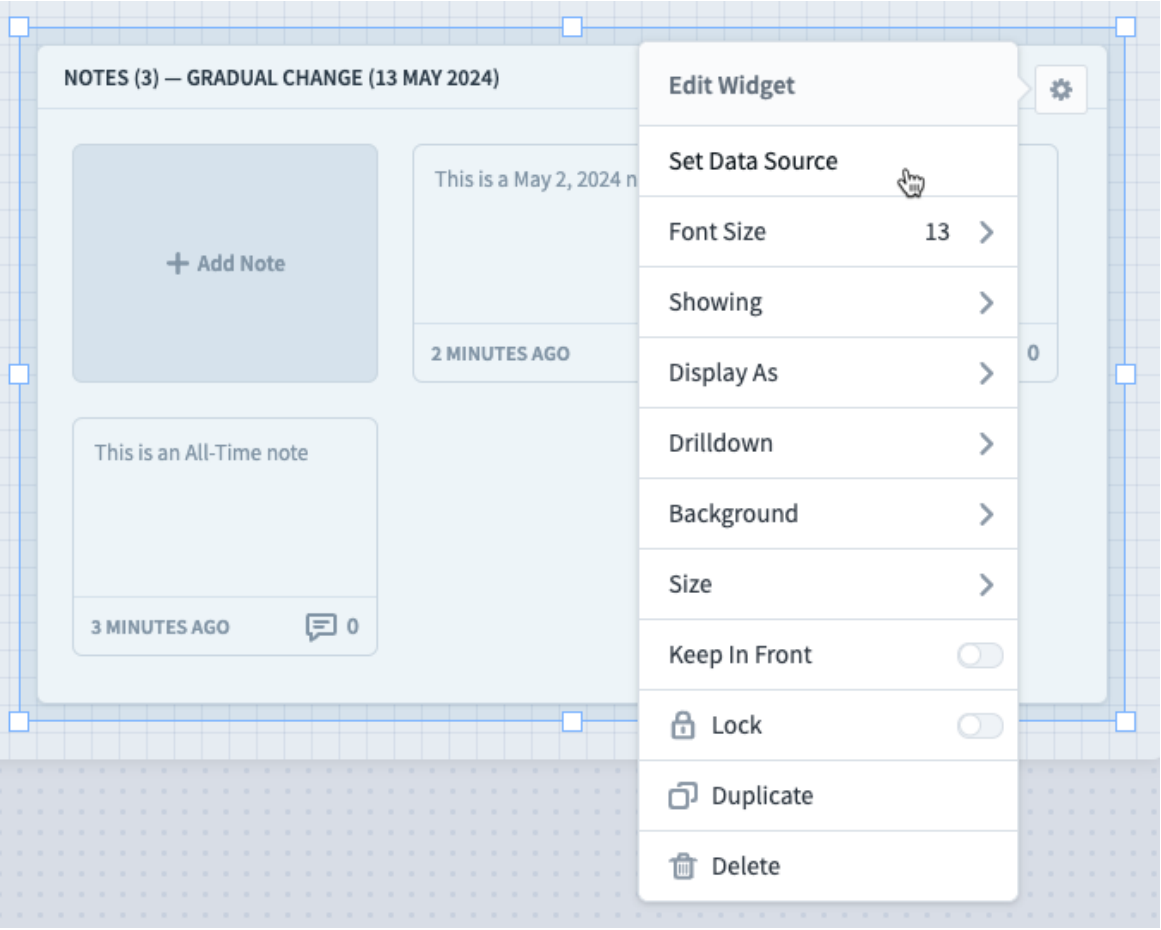


And, like single value widgets, there are separate speedometer and linear gauge options in the Add Widget menu for scorecards, initiatives, and datasets.

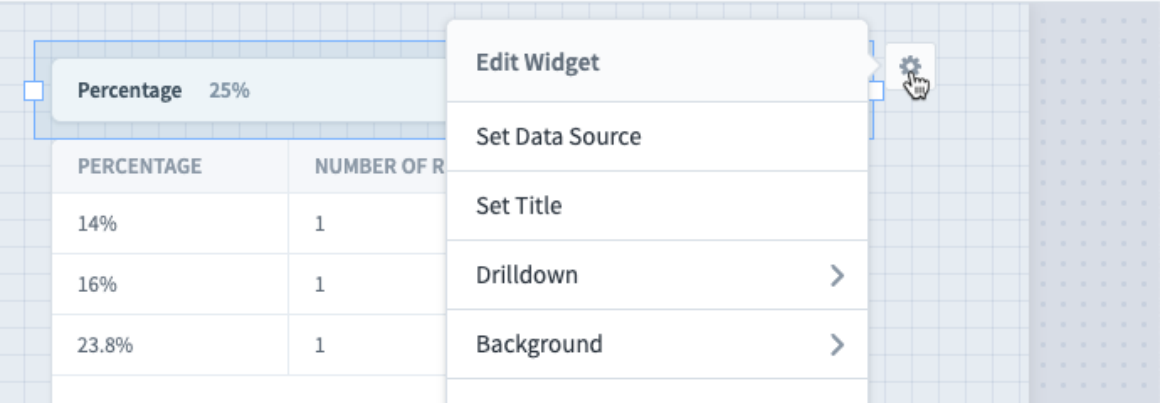


“Set Data Source” on all widgets

The ability to set the data source goes beyond single value widgets, speedometers, and linear gauges. Every widget powered by data now has a “Set Data Source” option, including the Scorecard Notes and Initiative Notes widgets:



Dataset Table widgets and Filter widgets:



Gantt Chart widgets and Initiative Chart widgets:

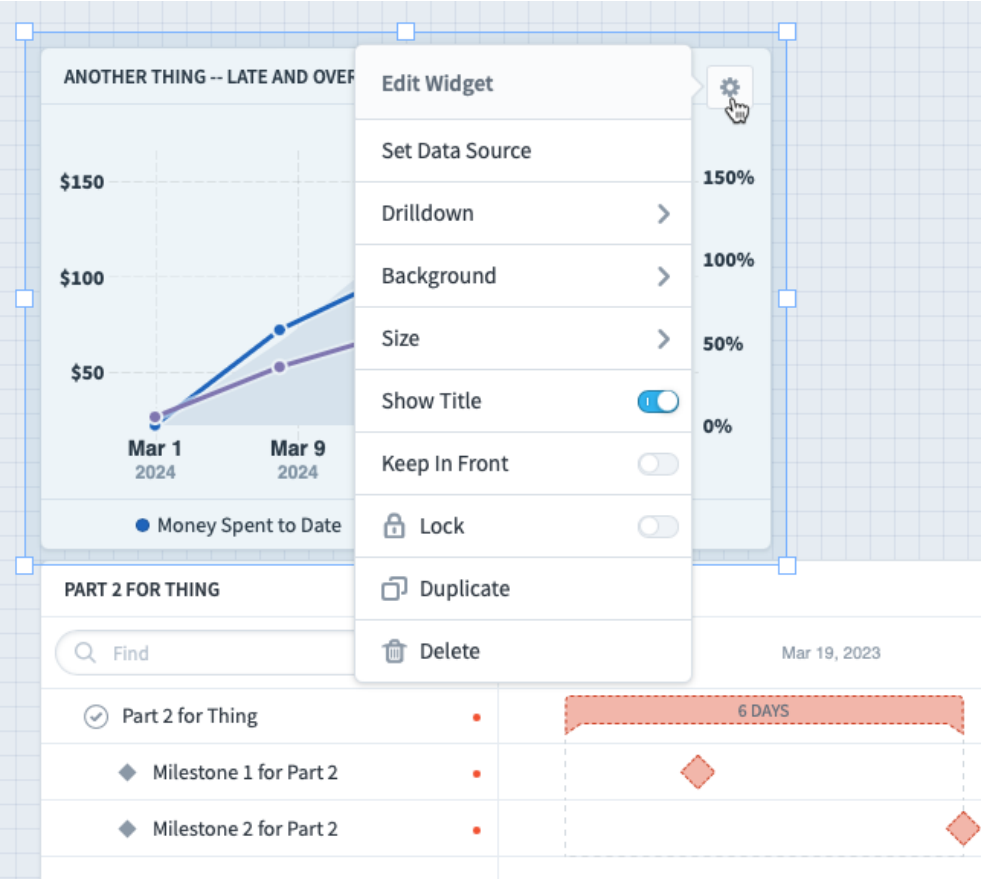
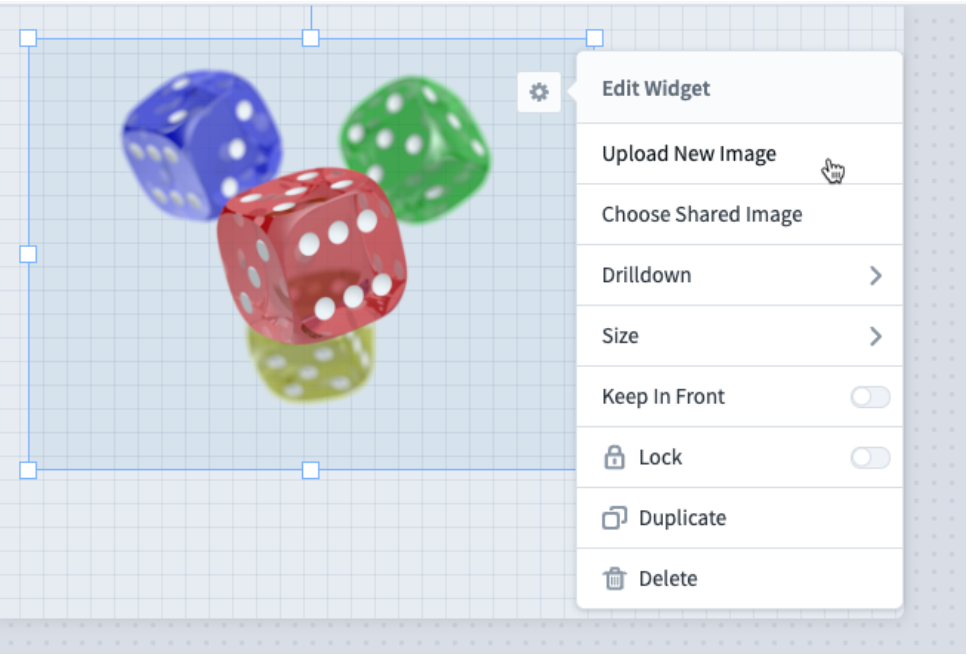


Image widgets have the option to either upload a new image or choose a shared image.

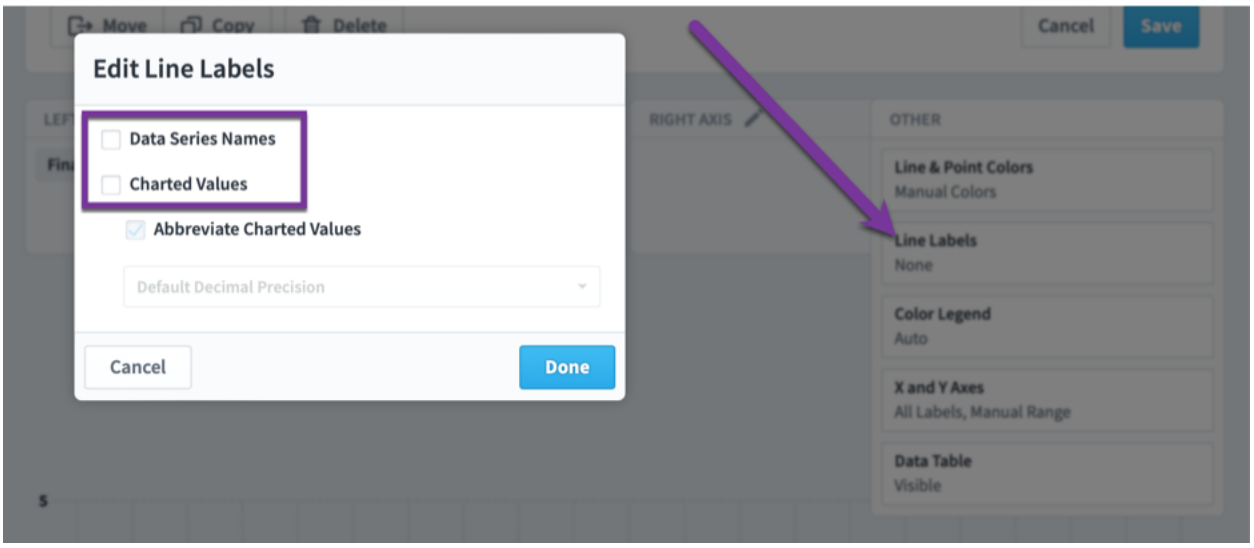


By allowing data source swap on all widgets, dashboard designers can duplicate existing dashboards, using them as layout templates.

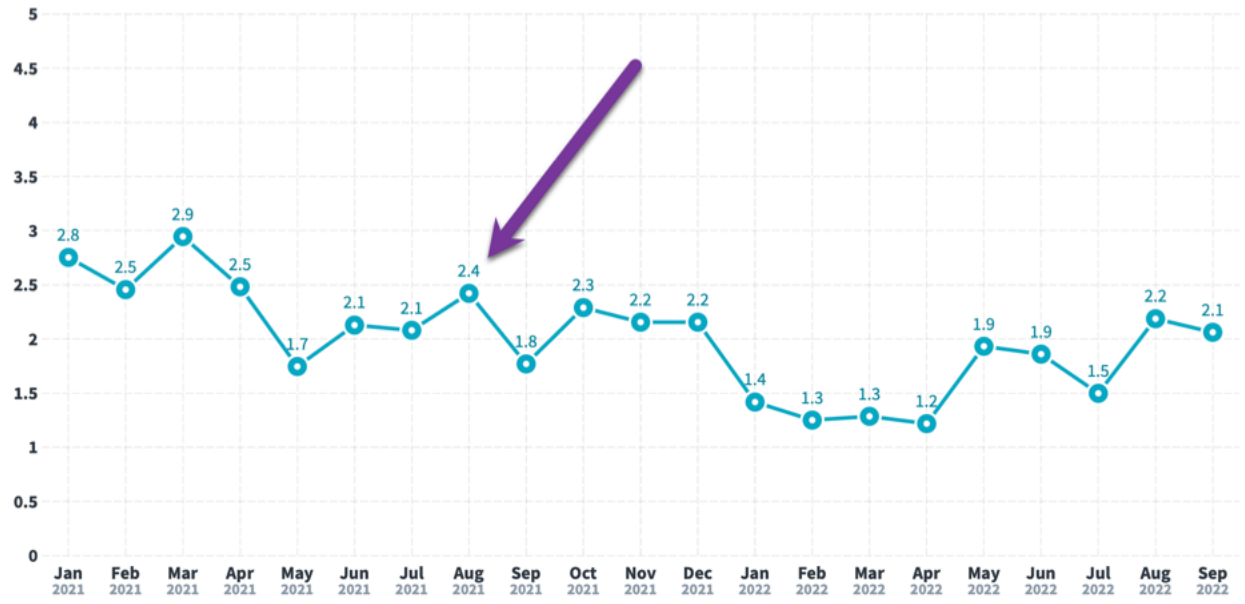
Charts

Showing values and names on line and area charts

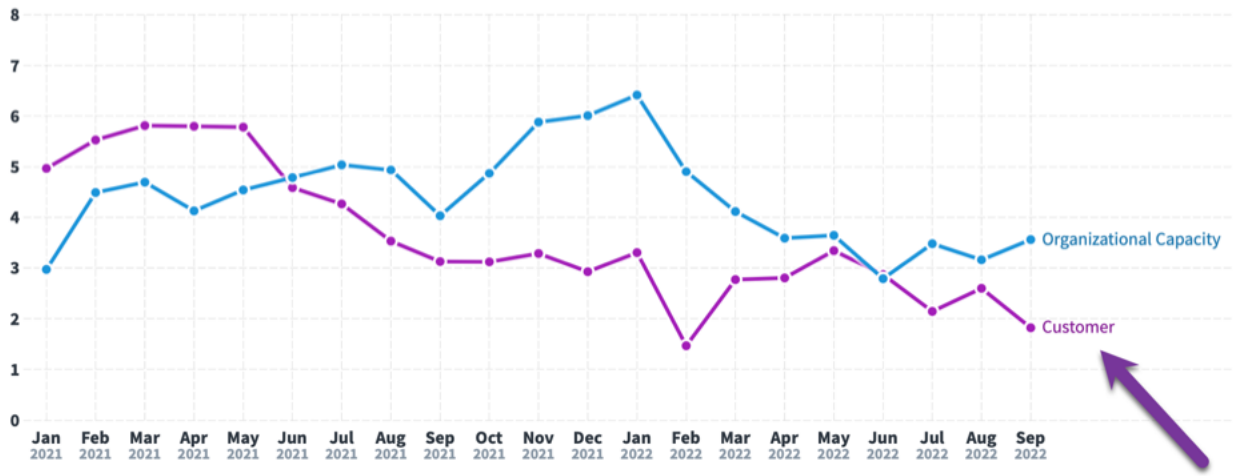
Line and Area charts now have Labels configuration options that open Edit Labels menus.



When "Charted Values" is checked, the chart now shows the values for each point.

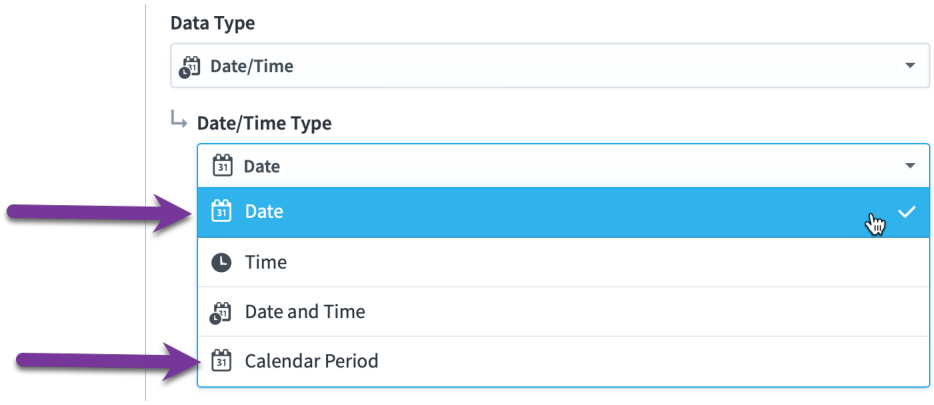


When “Data Series Names” is checked, the chart now shows the series names on the right side of the last point.



Group Similar on calendar period field chart ranges

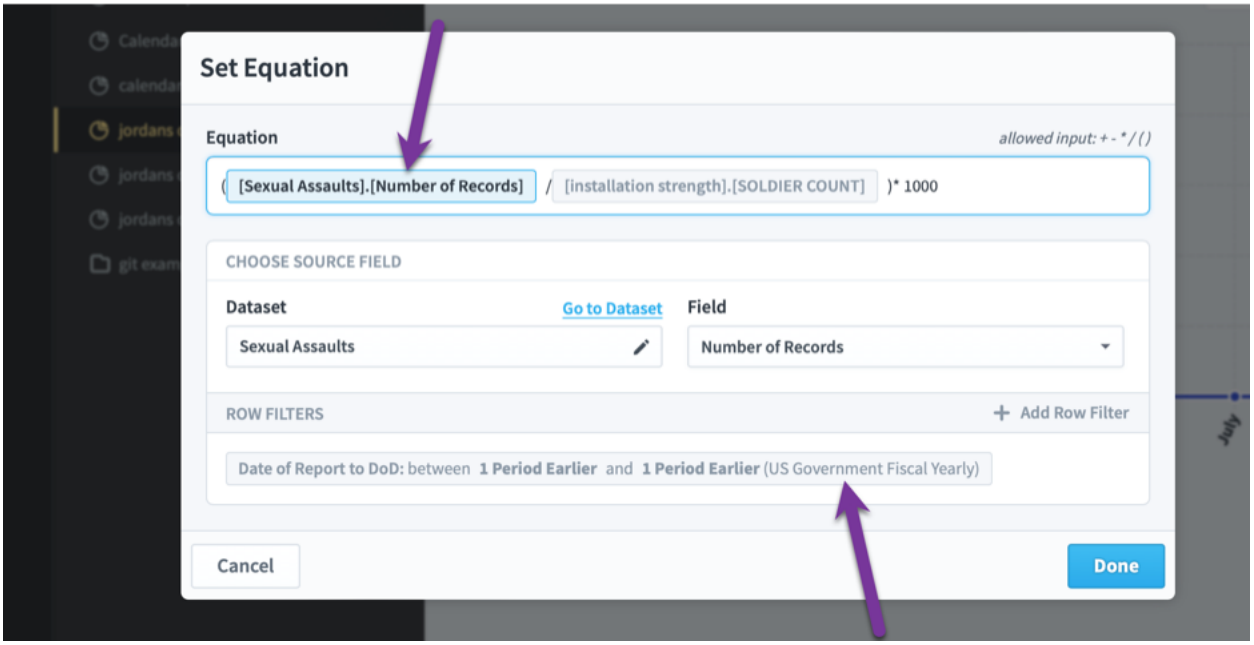
There are multiple types of Date and Time values that you can track in datasets. For the purposes of this enhancement, we’ll be discussing both Date fields and Calendar Period fields.



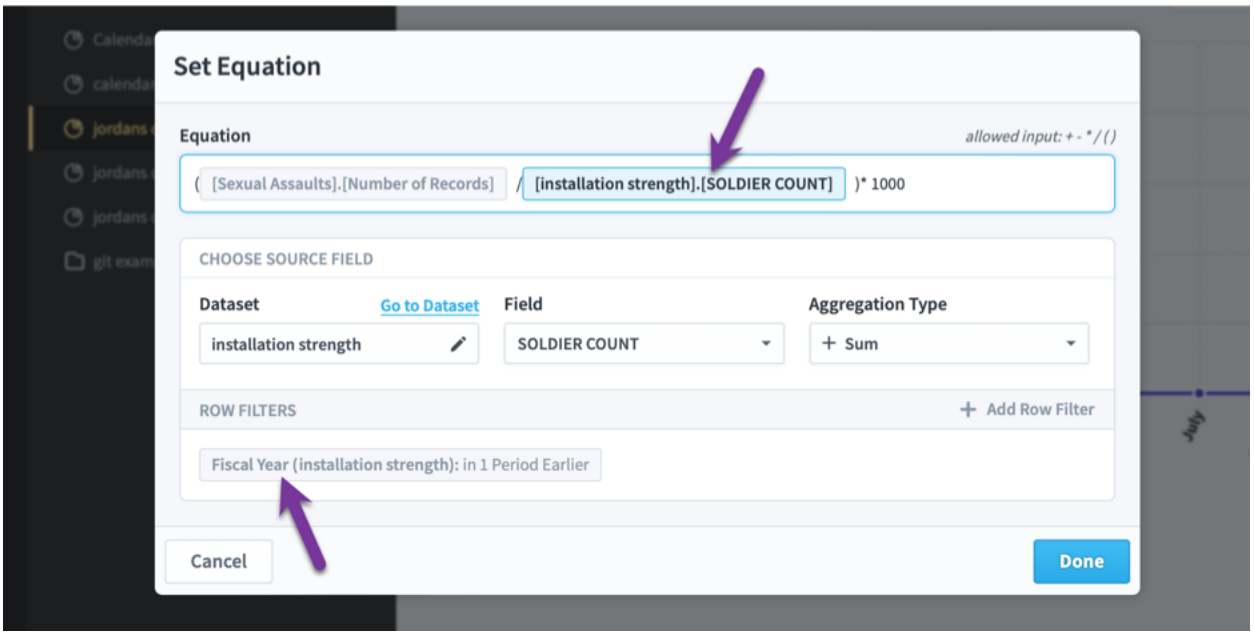
Date fields have values that are a single day. For example, an incident happened on a specific date. Calendar Period fields have values that are a range of multiple days. For example, a company had a specific number of employees during 2024. These two types of Date/Time measurements can now be mixed on charts in new ways.

This is best explained with an example. In order to show sexual assault incident rates per 1,000 soldiers, a chart needs to show a calculated value. This value’s

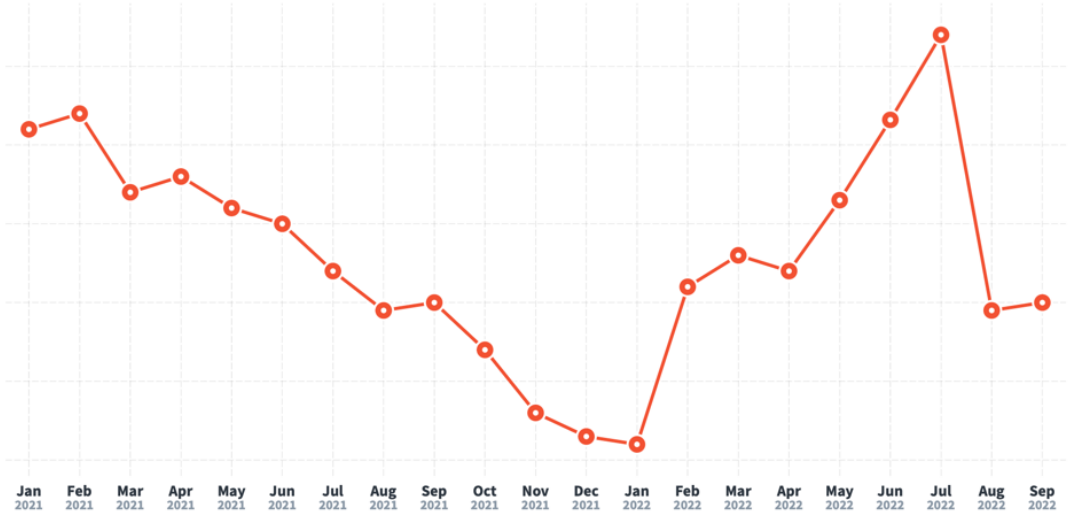
numerator is the number of sexual assaults in the current period. Sexual assaults are tracked with the Date field called “Date of Report to DoD”.



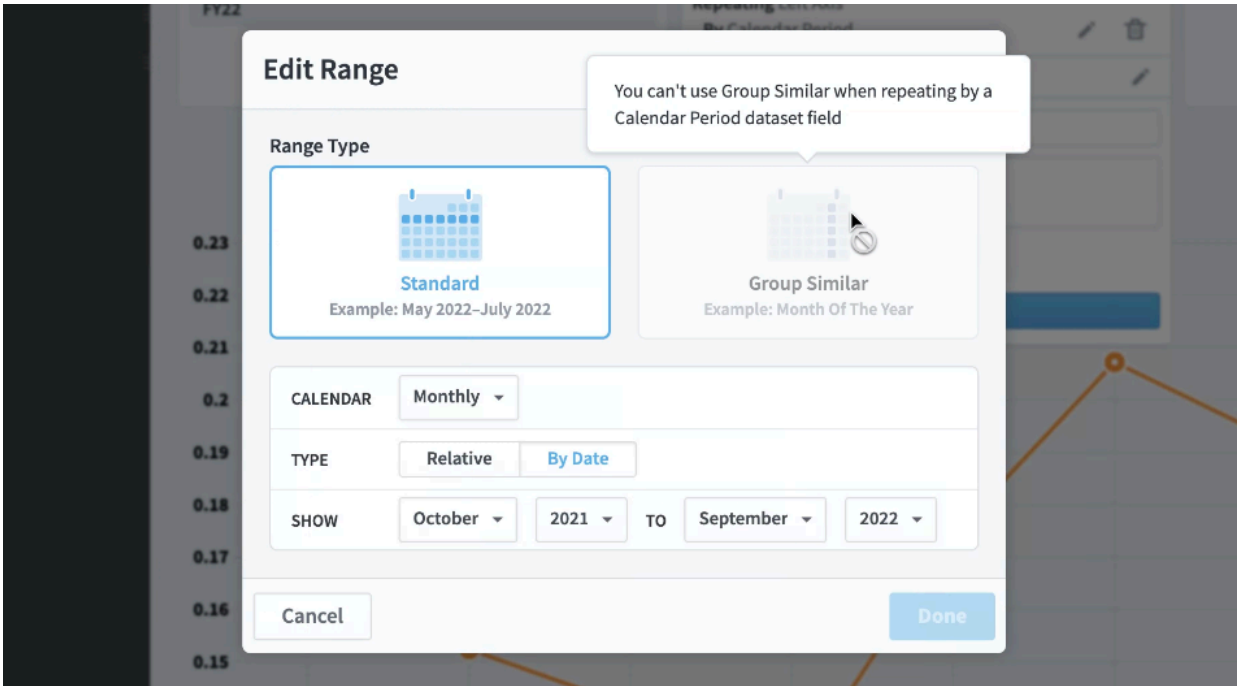
The denominator is the number of solders at the installation. Soldier count is tracked with a Calendar Period field.



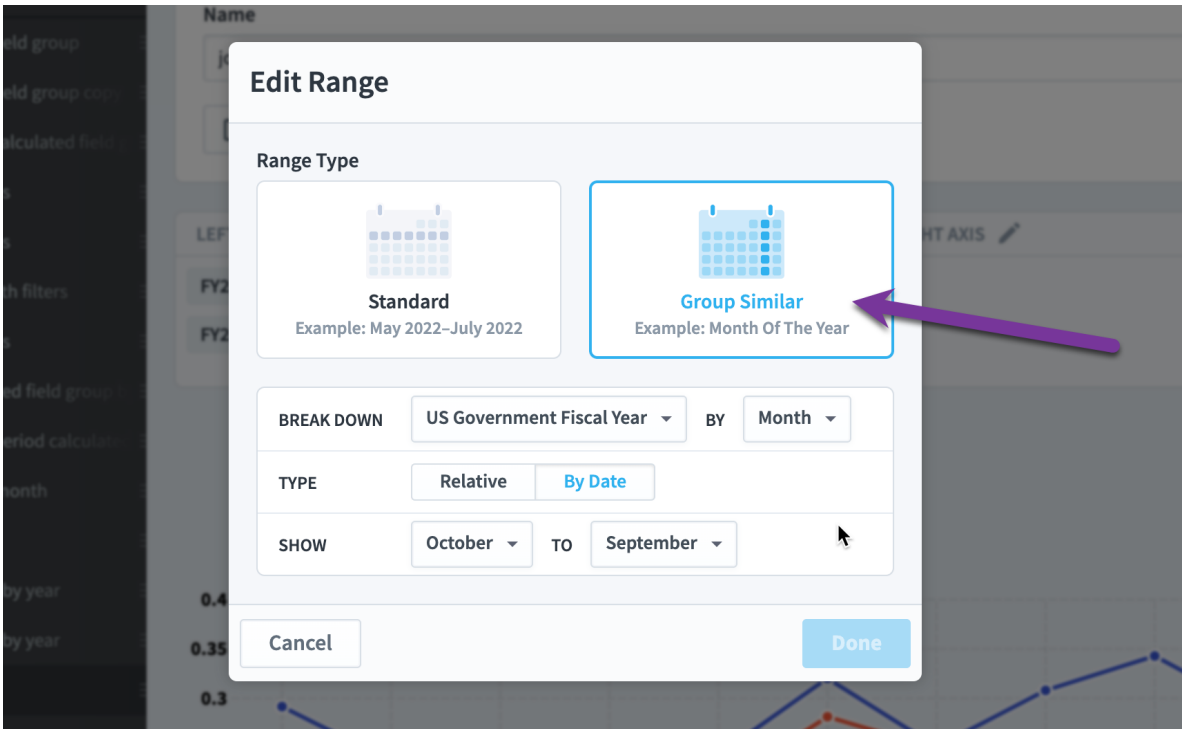
Mixed equations like this have always worked for standard time ranges. In this example, we’re seeing the monthly sexual assault rate between January 2021 and September 2022.



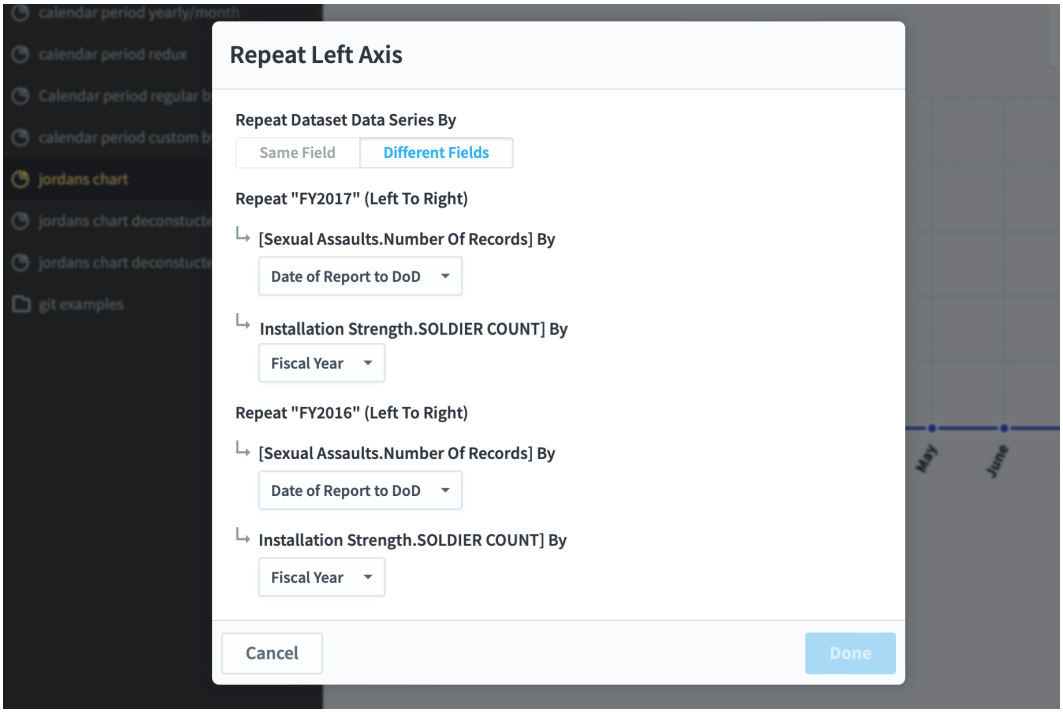
However, in previous versions of Spider Impact, users could not create "Group Similar" charts for Calendar Period data. These types of charts compare different time ranges on the same chart, for example months of the year for 2023 vs 2024.



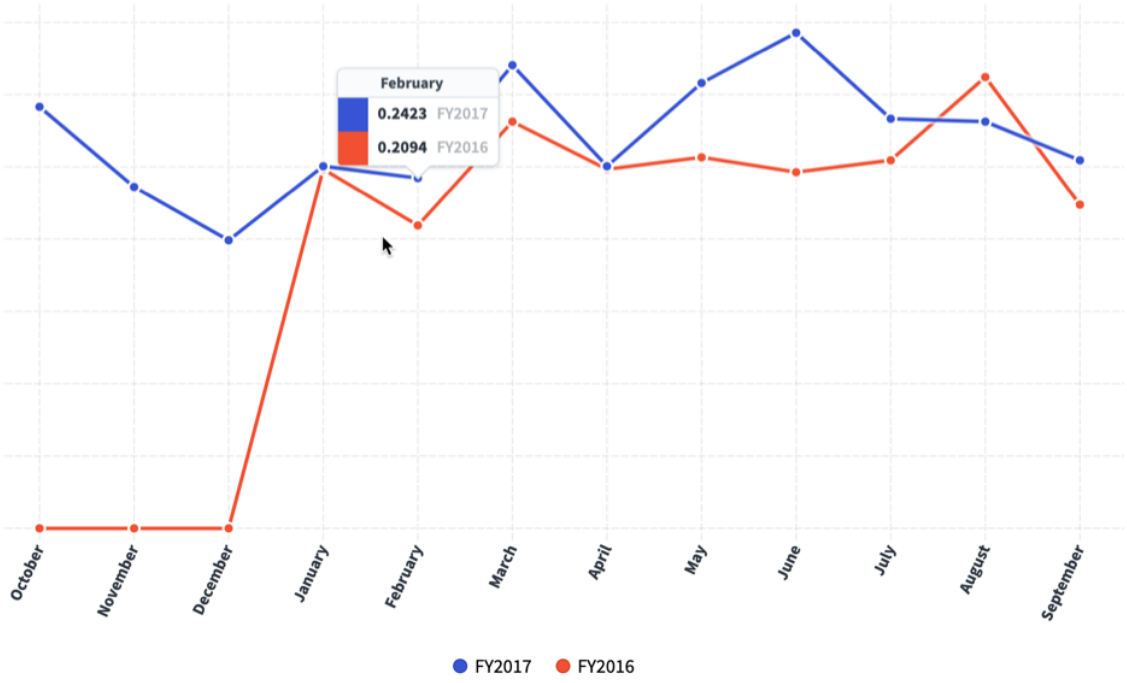
In the latest version of Spider Impact, "Group Similar" is now an option when graphing data from Calendar Period dataset fields.



This allows users to compare different time ranges against each other on the same chart. Users just choose the appropriate Date or Calendar Period field they want to use for every field in the equation.

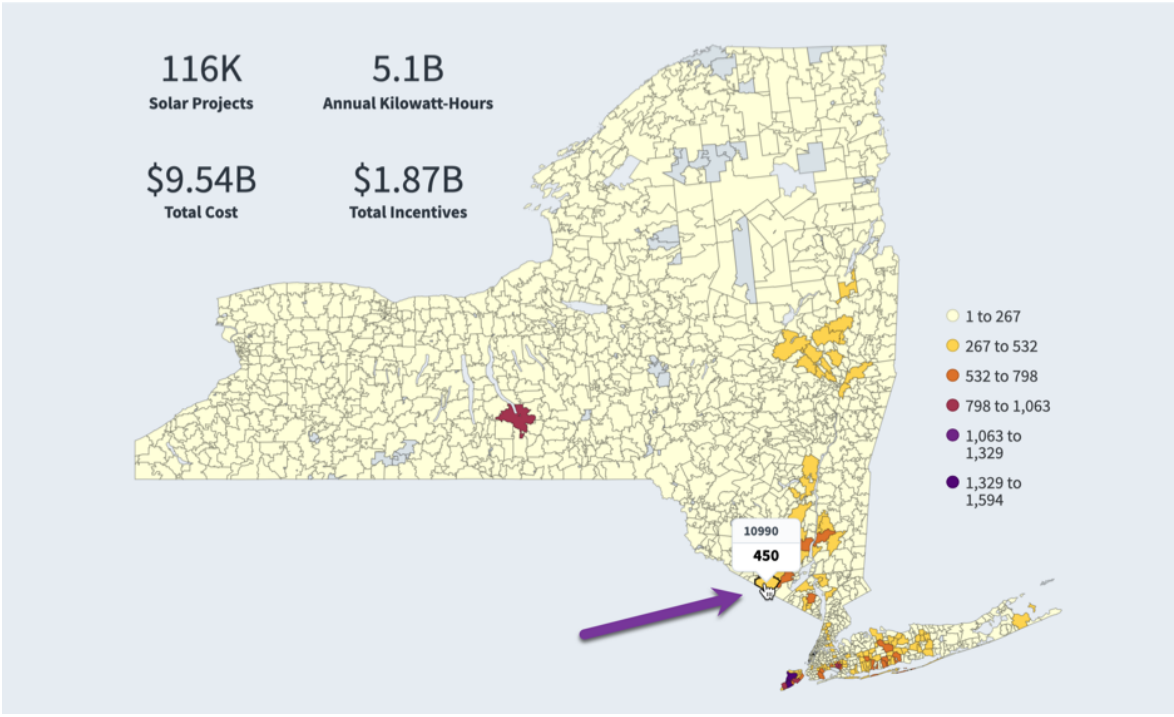


This results in a chart like this with each line showing data for a different year.

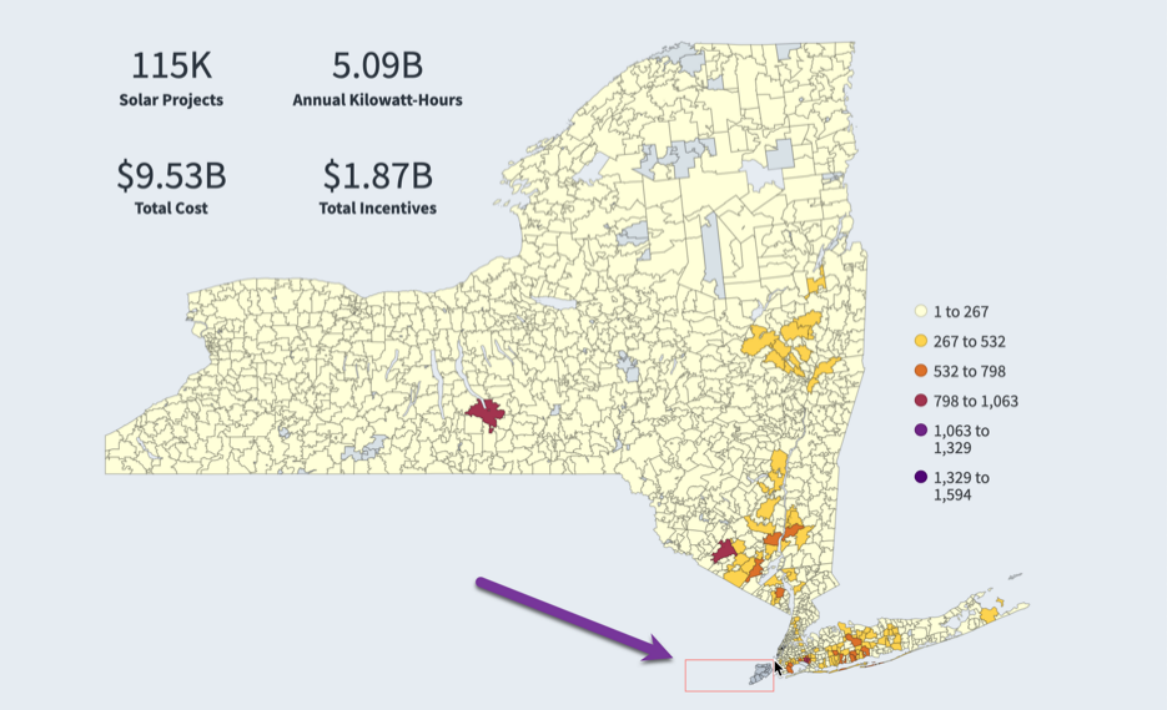


Selecting multiple map regions

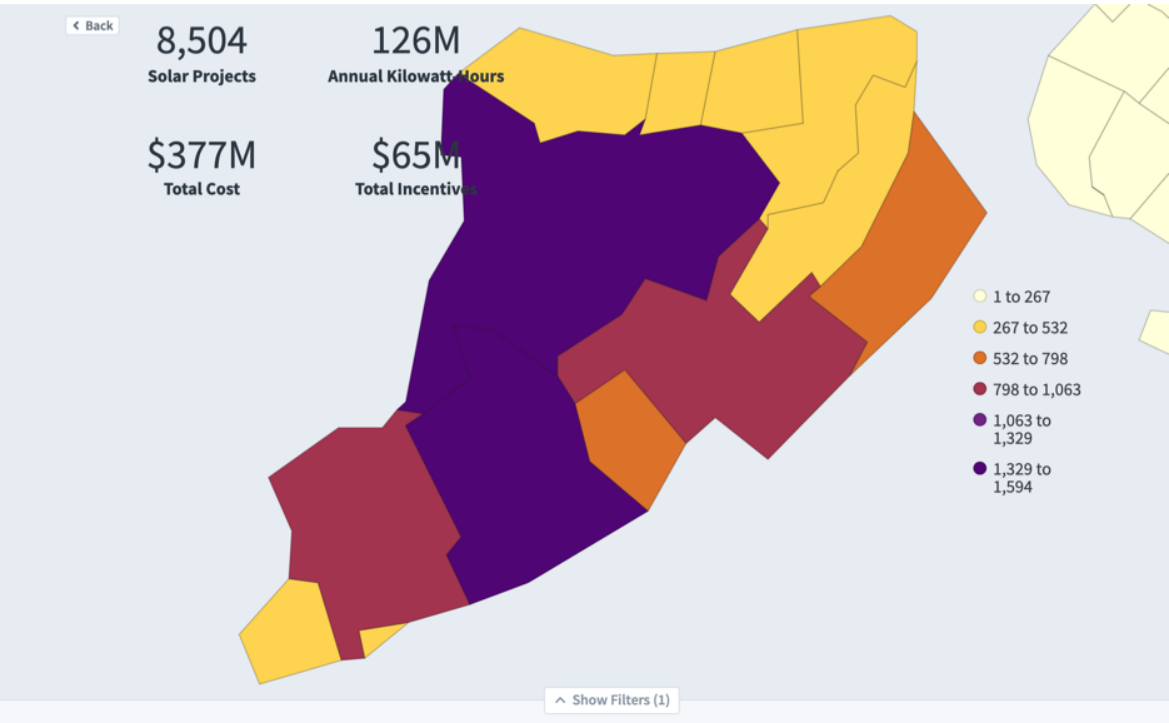
Users can drill down on multi-level maps my clicking on a specific region. In this example showing New York zip codes, we can click on 10990 to drill down and filter on that zip code.



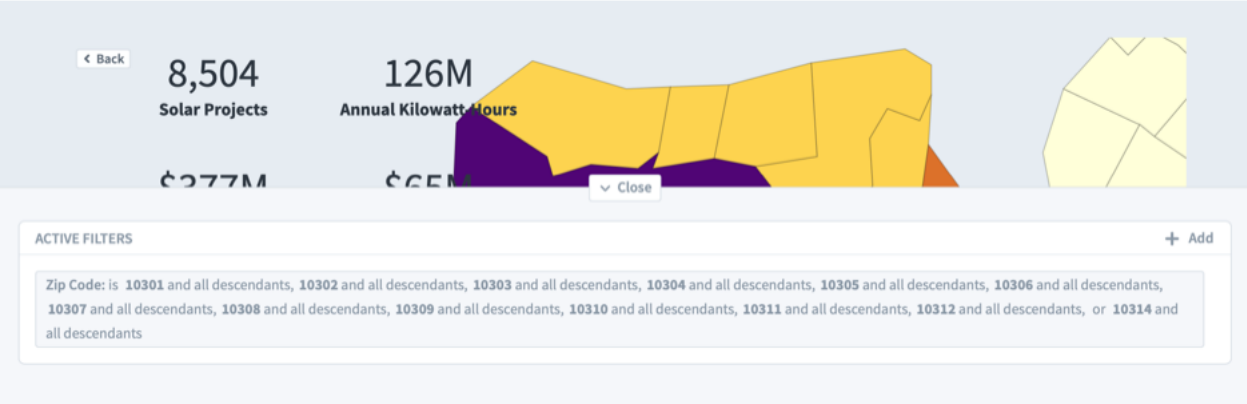
You can now also drill down by clicking and dragging to create a selection of multiple map regions. Here we're creating a selection around all of Staten Island.



As soon as we release the mouse drag, the map zooms into the selected zip codes. The totals in the dashboard reflect our new selection.



When we expand the dashboard filters drawer on the bottom we can see a filter has been applied to only show data for these 13 zip codes.



Datasets

New “record is editable” & “record edited” filters

There are two new filters for dataset records that are similar to the existing “Record Manually Added” filter:

- Record is Editable
- Record Edited

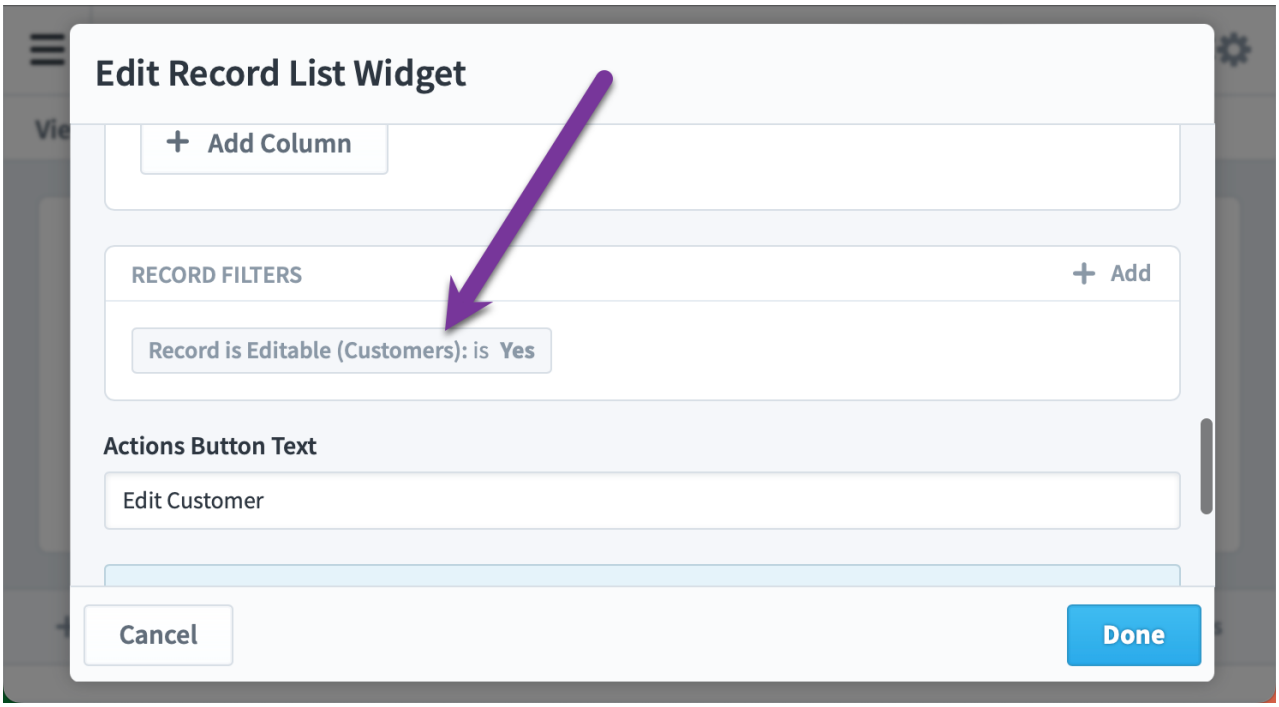
These are helpful in a variety of situations like reports and dashboards, but they’re particularly helpful in Forms. For example, here is a record list widget in a form, and it’s showing all customers that the current user has permission to view.

Existing Customers

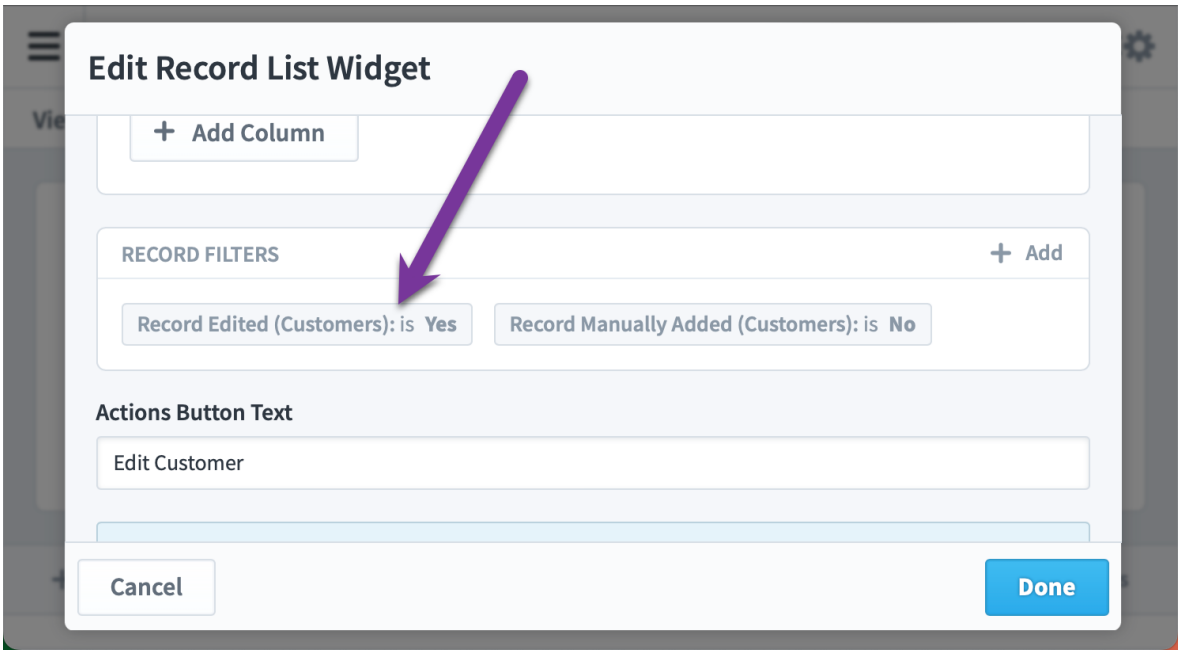
Find

POC FIRST NAME	POC LAST NAME	POC EMAIL	COUNTRY TEXT	
Aaron	Meighan	aaron.meighan@yahoo.com	Canada	Edit Customer
Aaron	Dimitri	aaron@dimitri.com	United States	Edit Customer
Abbey	Evetts	abbey_evetts@cox.net	Sweden	Edit Customer
Abbey	Geel	ageel@yahoo.com	Canada	Edit Customer
Abbie	Melito	amelito@hotmail.com	Canada	Edit Customer
Abbie	Meranda	abbie@aol.com	Canada	Edit Customer
Abbie	Terlecki	abbie.terlecki@terlecki.co…	India	Edit Customer
Abby	Willers	abby_willers@aol.com	United States	Edit Customer
Abby	Collica	abby_collica@yahoo.com	Poland	Edit Customer
Abdul	Simank	abdul.simank@simank.com	Nigeria	Edit Customer
Abe	Everet	abe@gmail.com	United Kingdom	Edit Customer

This works well unless there are advanced permissions applied that only allow the user to edit some of the records that they can see. In that situation, forms like this that are designed for editing records can be very frustrating for people using them because it's not at all clear which of these records are editable. By adding a "Record is Editable" filter to this record list widget, it will only show records that the current user has permission to edit.



The other new filter, "Record Edited", is helpful for managing datasets that blend data from a system of record with data collected via forms. For example, here we're choosing to see all records that weren't manually added (they originate in a system of record) but they have been edited with new data.

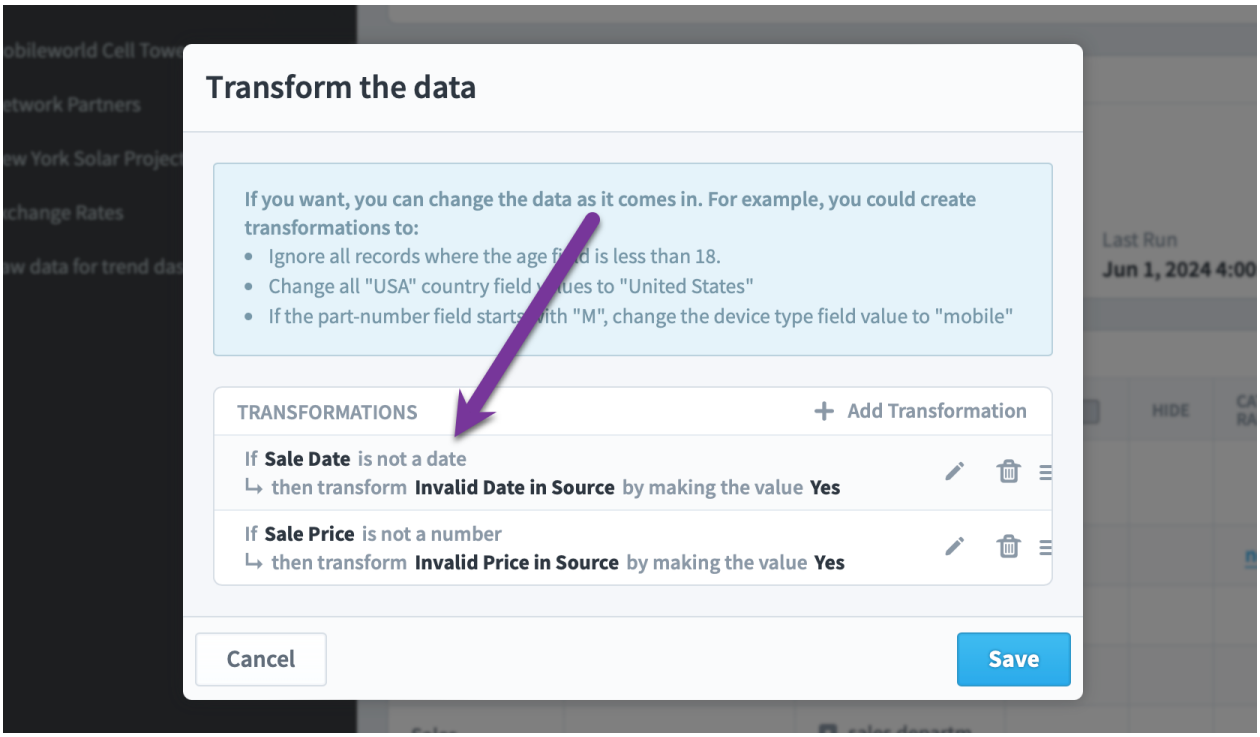


Data type detection in transformations

This enhancement adds four new transformation conditions for modifying data as it's being imported. These transformations not only make it easier to accommodate bad data, but make it possible to report bad data so it can be fixed in the systems of record.

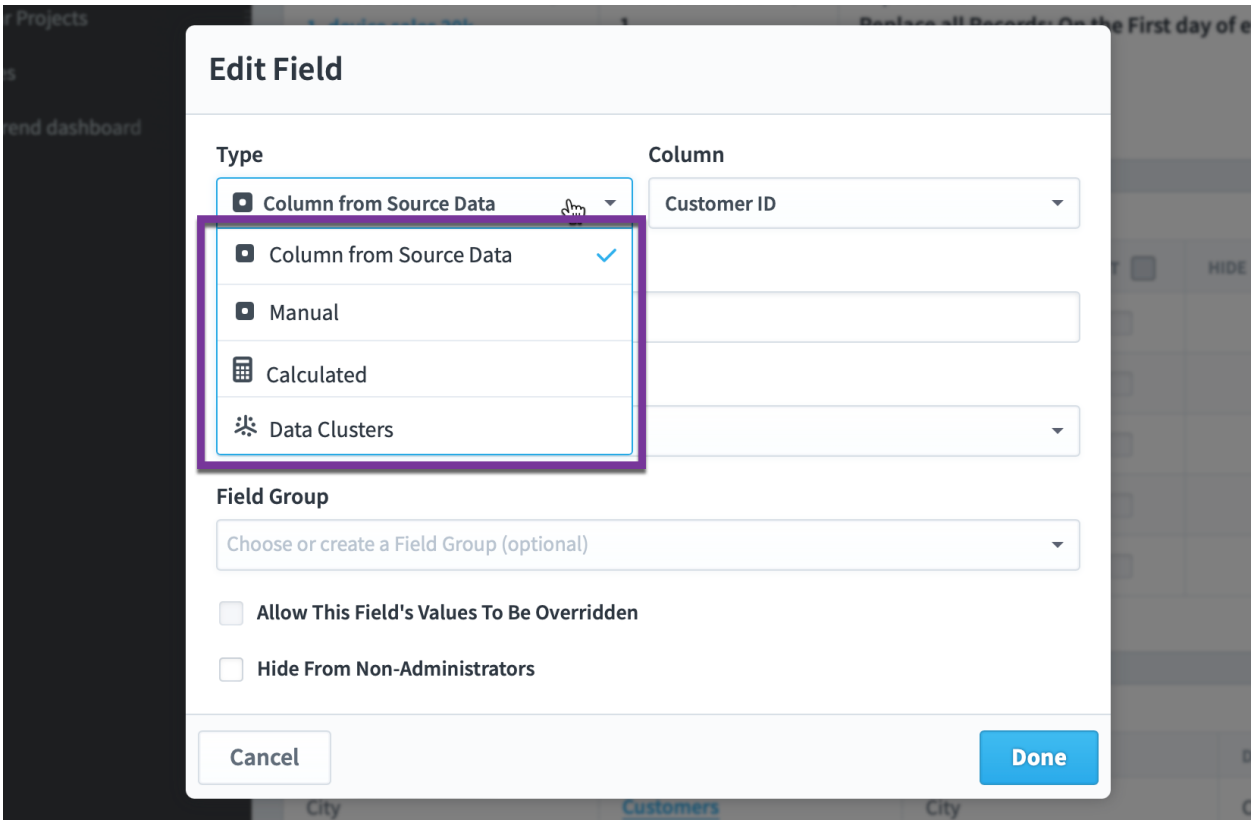
- Is a number
- Is not a number
- Is a date
- Is not a date

For example, there are situations where data being imported has values like "Thanksgiving" instead of a valid date because that system of record has weak data validation. In these situations, the transformation can check for an invalid date and mark the "Invalid Date in Source" field as true. Then a bad data report could be run and sent to the system of record every month that includes only the records with "Invalid Date in Source" set to true.



Using manual and calculated fields in equations

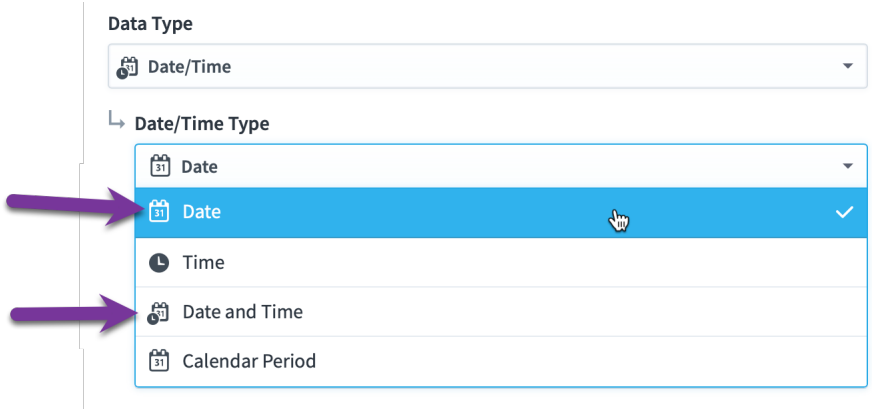
There are several different dataset field types, each with a different way of getting their data.



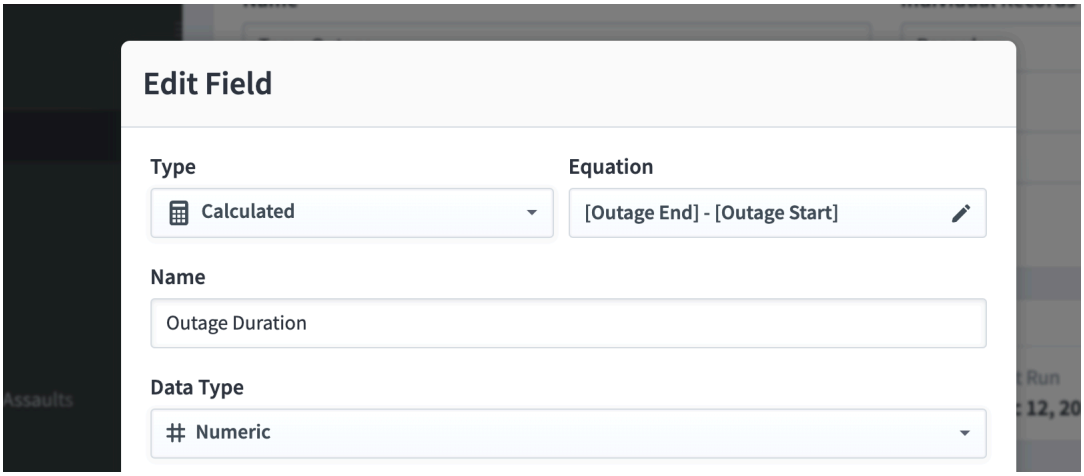
Historically, only "Column from Source Data" fields could be used in the equations for Calculated fields. Now both "Manual" and "Calculated" fields can also be used in equations. Manual fields are important because they allow calculations based on data that has no system of record and is only collected via forms. Other calculated fields are important because they allow multi-level calculations with equations based on other equations.

Fractional days in "Date and Time" field math

Some dataset fields track just "Date" and others track both "Date and Time".



You can use both of these types of Date/Time fields in calculated field equations. For example, you can determine how long an event is by subtracting the start field from the end field.



Historically, these equations have resulted in the number of days between the two events, and that continues to be the case for Date fields. When using "Date

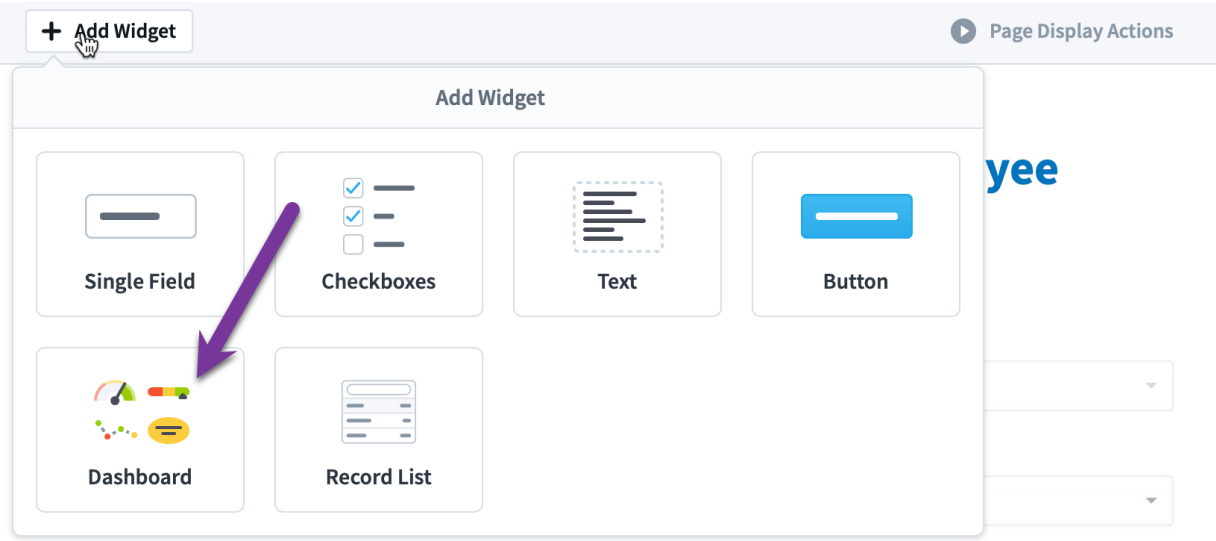
and Time" fields in equations, however, the software now calculates fractional days to better reflect the time between events.

Forms

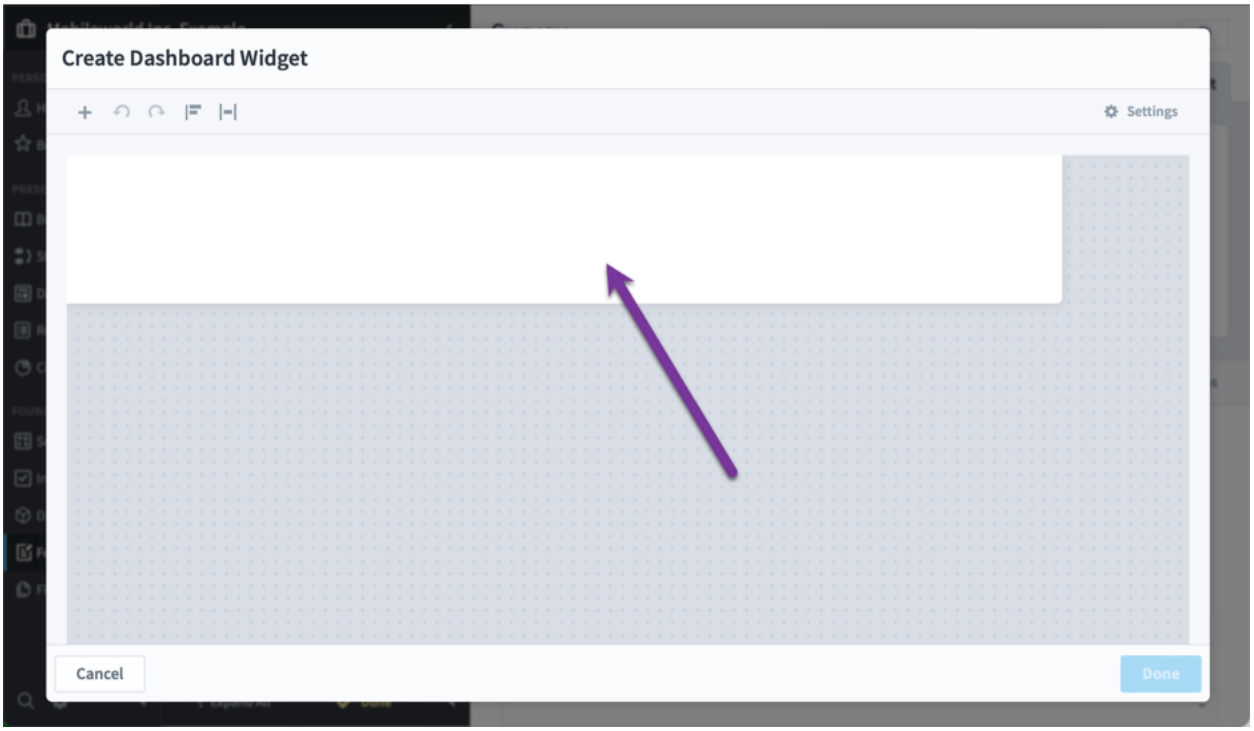
New dashboard form widget

Forms are often shared outside of the software for surveys and for modifying dataset records in mini apps. Form designers have traditionally used text widgets to add headers that introduce each form.

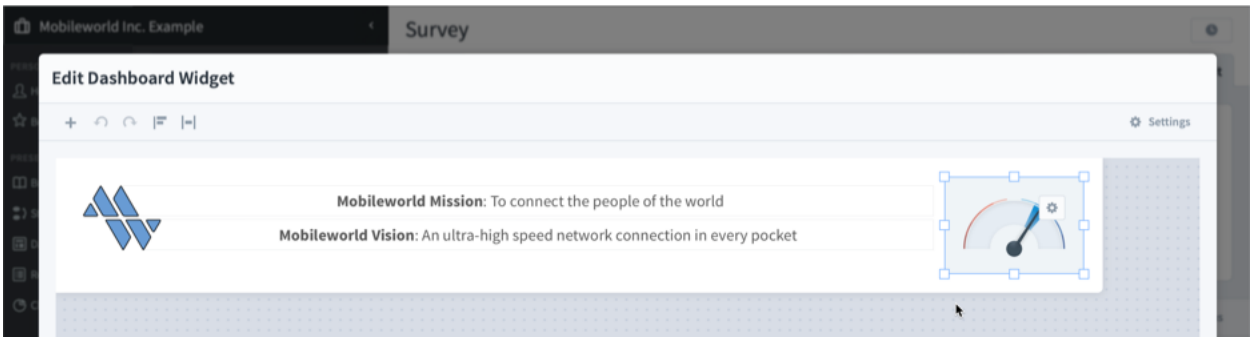
You can now add Dashboard widgets to forms that dramatically improve their display capabilities.



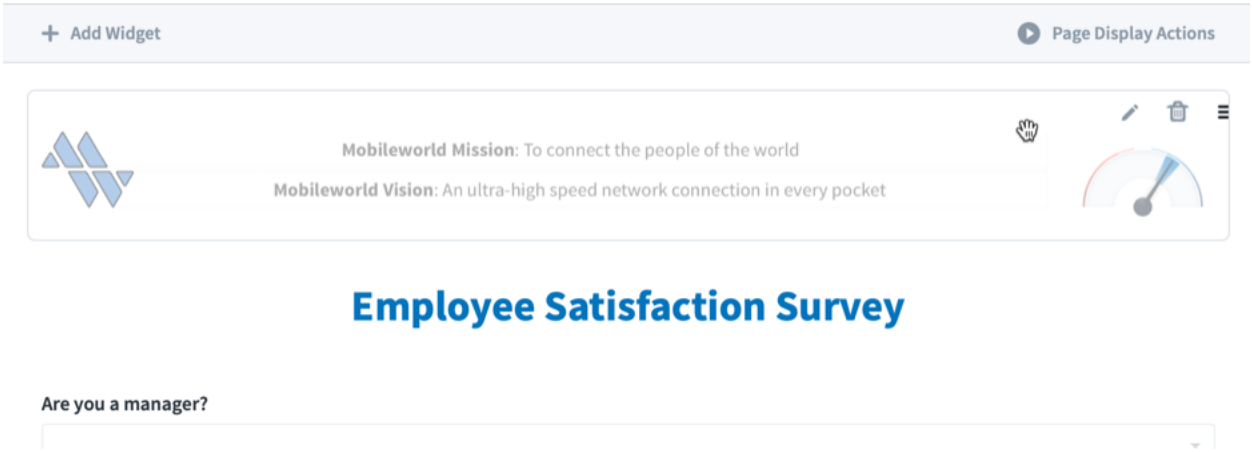
When we add a Dashboard widget to a form, we see a blank dashboard canvas that's wide and short.



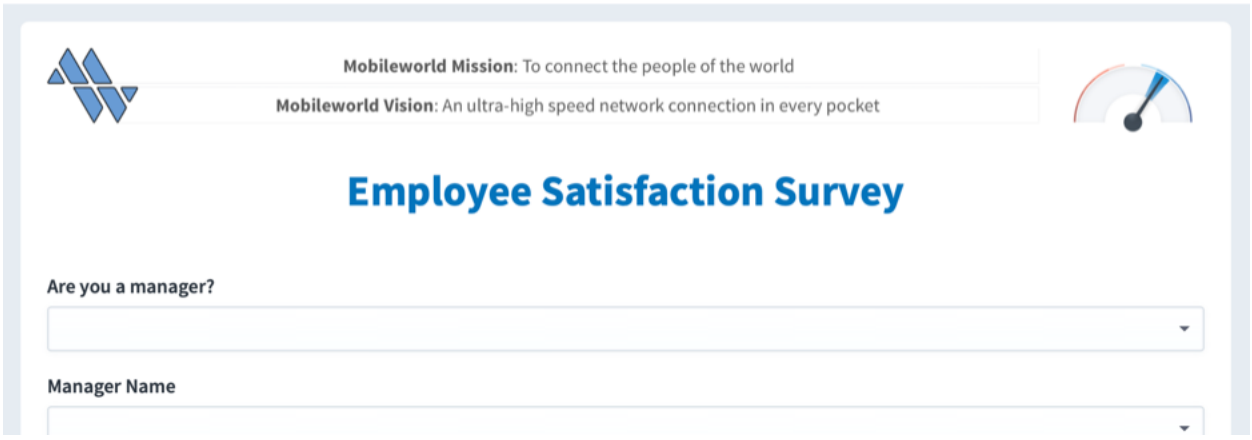
This dashboard widget will be displayed along with the other widgets on your form, and has the full power and flexibility as any other dashboard in the software. Here we're adding our company logo, some text, and a speedometer showing the average score of all employee satisfaction surveys.



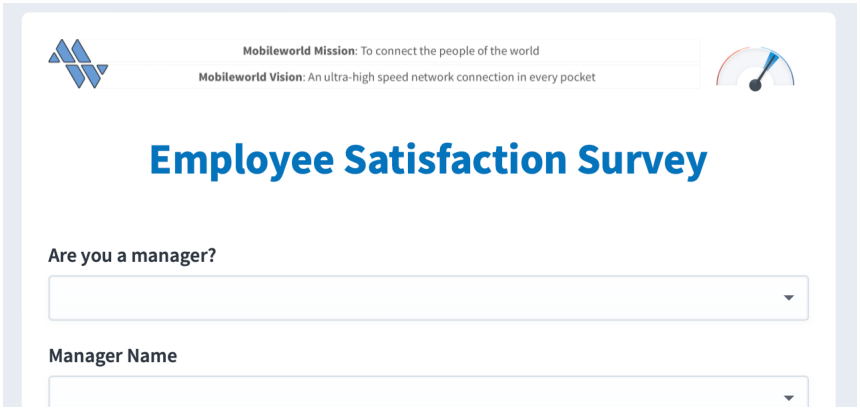
When we click Done we see the new dashboard widget listed at the bottom of the form, so we'll drag it to be on top.



Now when people view the form they see an attractive header showing live data.

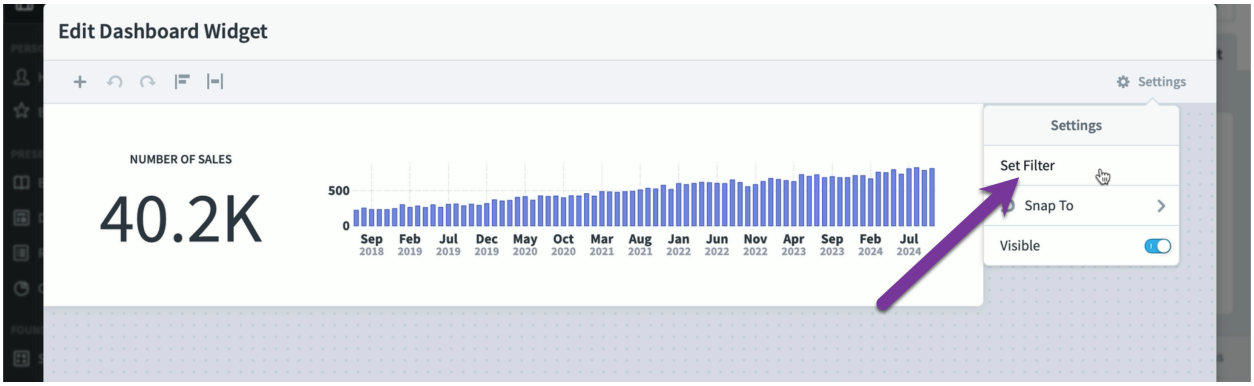


Dashboard form widgets automatically resize so they always take up the full width of the form. In this example the form is being used on a narrow device like a tablet.

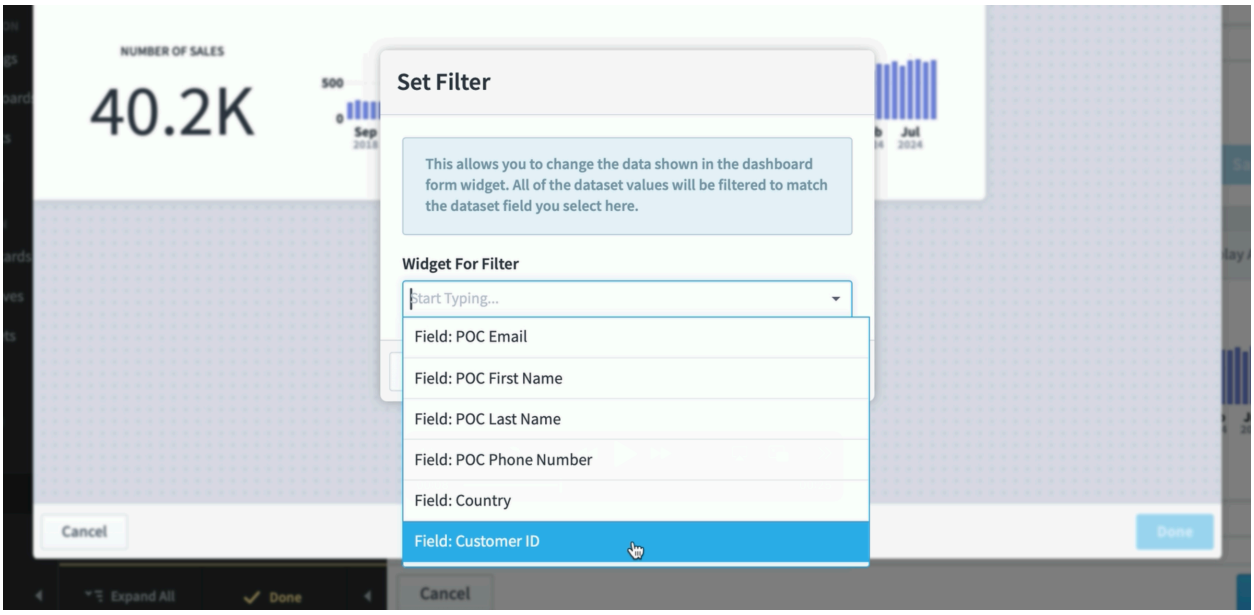


Form dashboard widget filtering

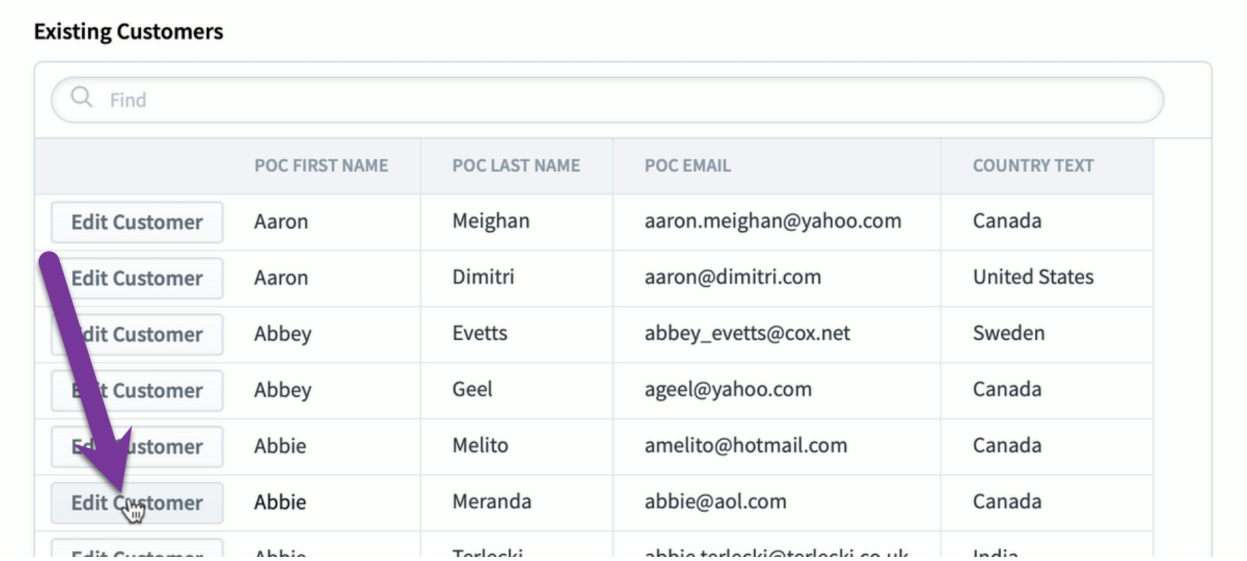
Dashboard form widgets have a Set Filter option in their Settings tooltips. We'll set a filter for this dashboard widget showing all sales over time.



This opens a dialog that allows you to choose a single value widget on the page to use as a filter for that dashboard. If that widget's value is blank, no filter is applied. In this example we're going to filter the dashboard widget to only show sales records matching the value in the Customer ID field.



Now let's see this in action. The first page of the form is a record list widget where we choose a customer.



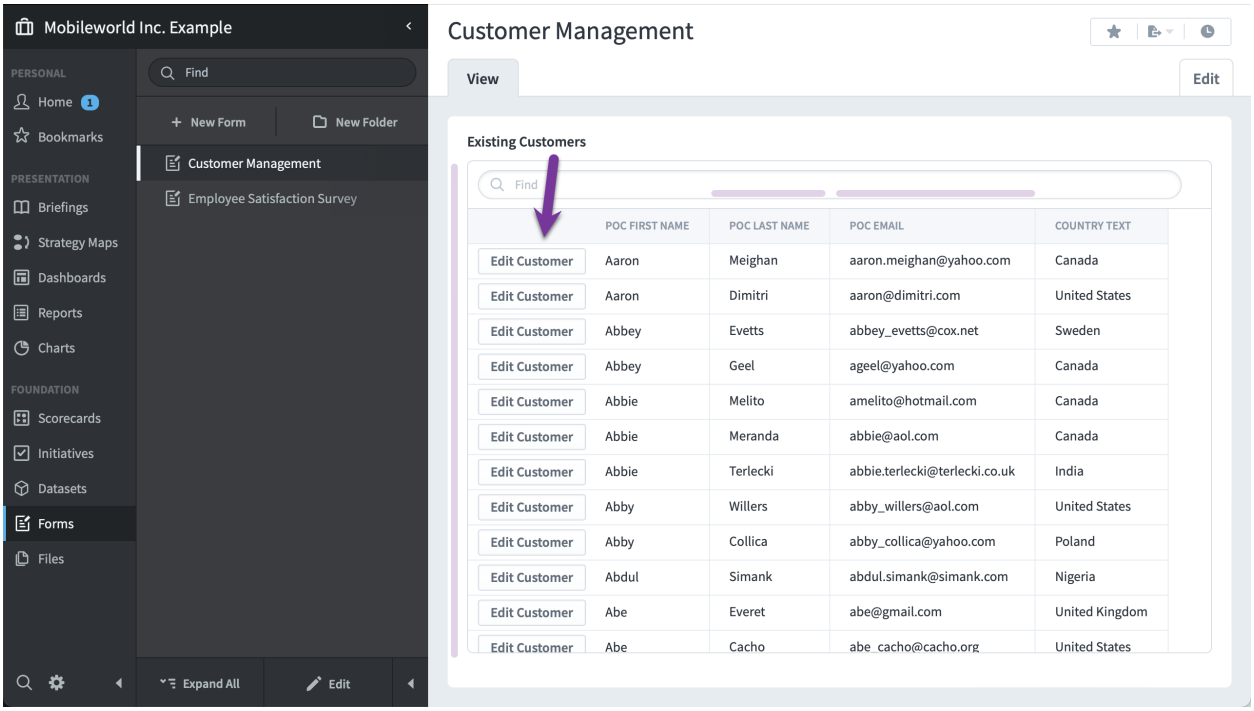
This takes us to the customer details page. At the top is our dashboard widget that is now filtered to only show the sales for the currently selected customer.

It's also important to note that the single value widget you choose to use for the filter doesn't actually have to be visible on the page. In this example the Customer ID widget we're using for the filter is hidden and is automatically set on page load along with all the other customer fields.

Record list widget automatic sizing and positioning

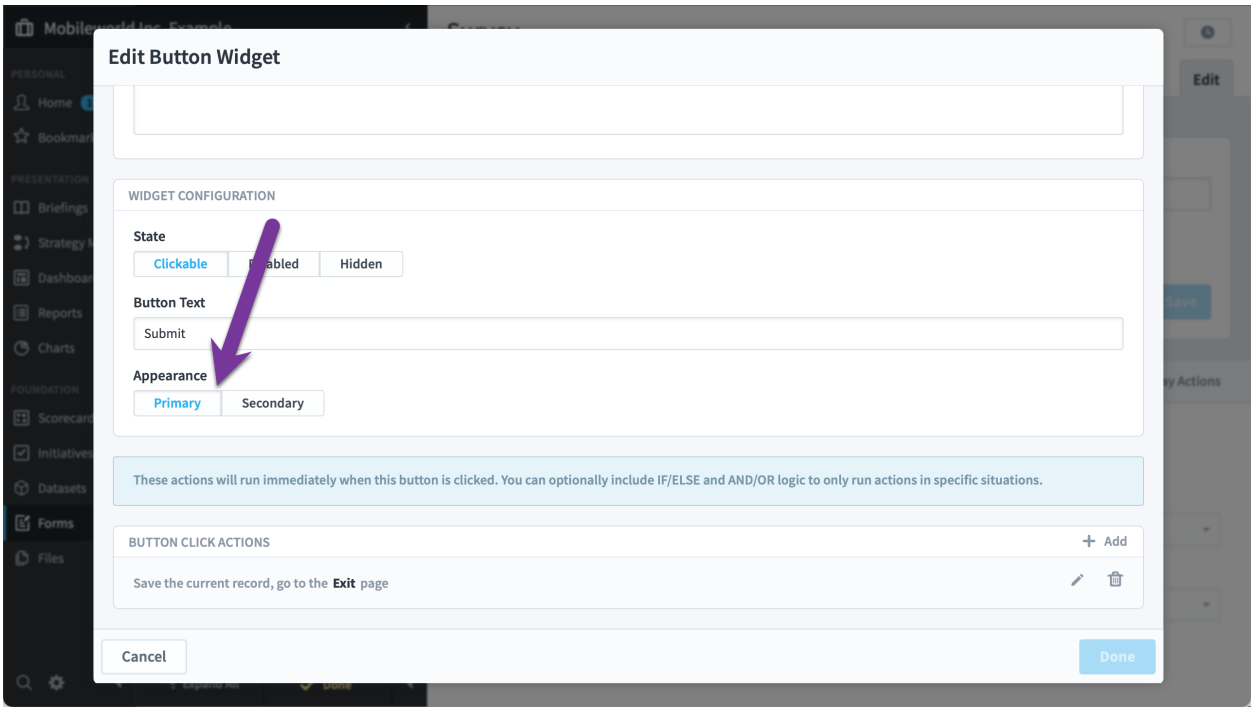
Record list widgets are now much easier to use. The column widths adjust based on their content, the widget height adjusts based on the amount of vertical

space in the browser, and the action button is now on the left rather than the right.



Primary and secondary styles for button form widgets

You can now set Primary or Secondary styling for buttons.

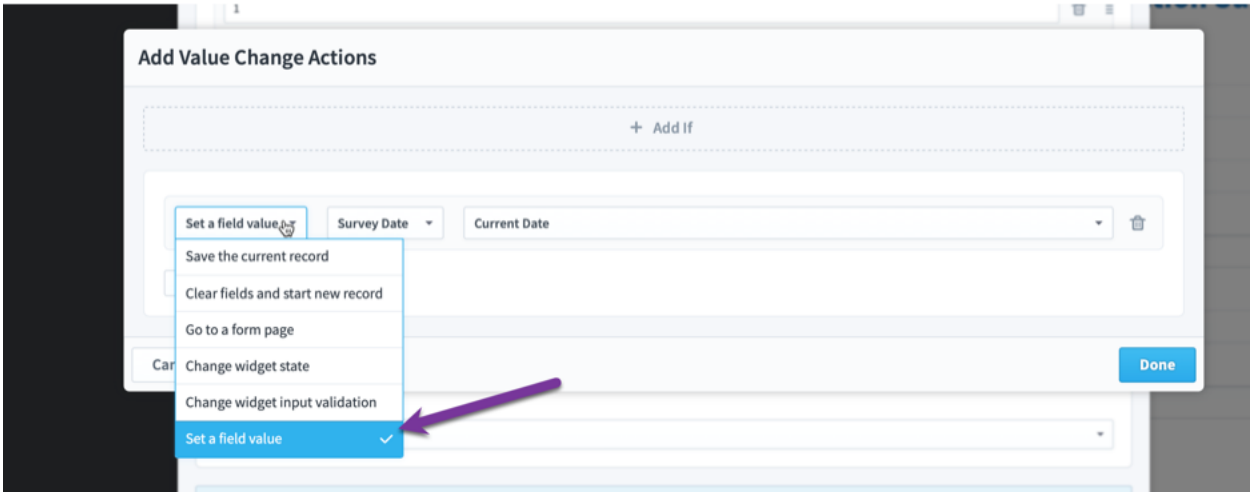


This is helpful when displaying multiple buttons, allowing you to choose primary for a Save button and secondary for a Cancel button.

Form action to set a field value

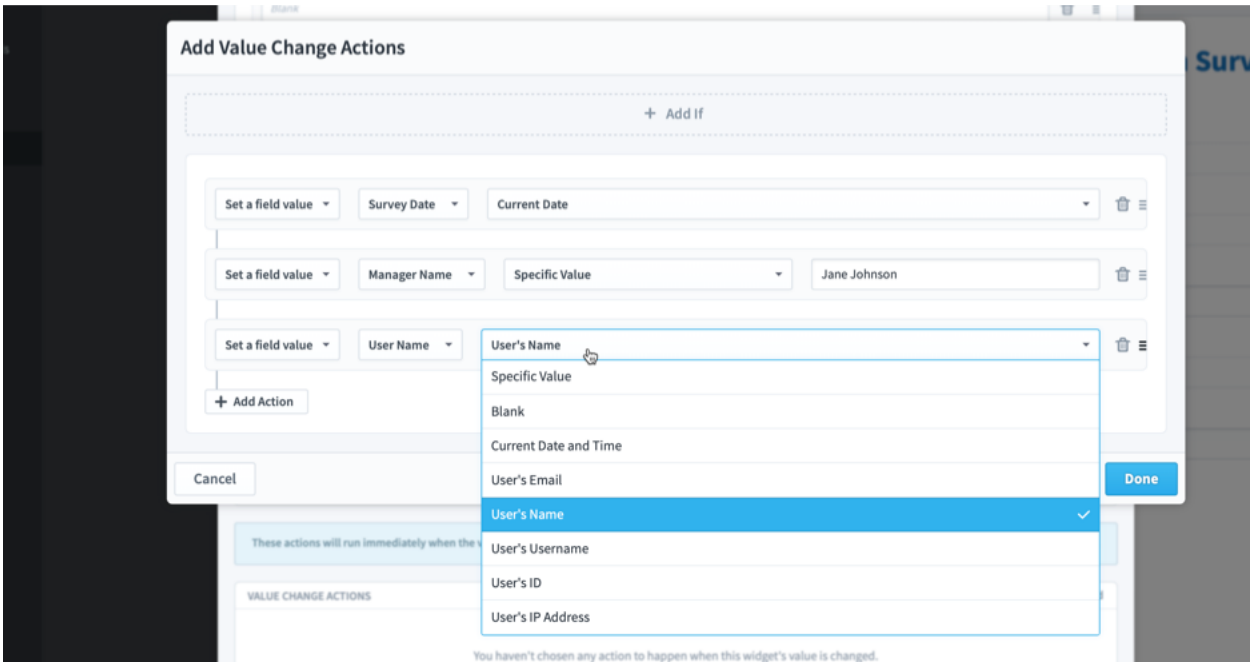
Forms allow you to quickly build interactive mini-apps for collecting data. As part of this interactivity, you can create actions that run at various times, like whenever a specific button is clicked, when a user changes a dropdown value, or when the form is first shown. These actions do things like save the current record or take the user to a different form page.

This enhancement adds a new action type called "Set a field value".



When run, this new action sets the value of a specific field to one of these options that the user didn't explicitly enter into the form:

- Specific Value
- Blank
- Current Date and Time
- User's Email
- User's Name
- User's Login Name
- User's ID
- User's IP Address

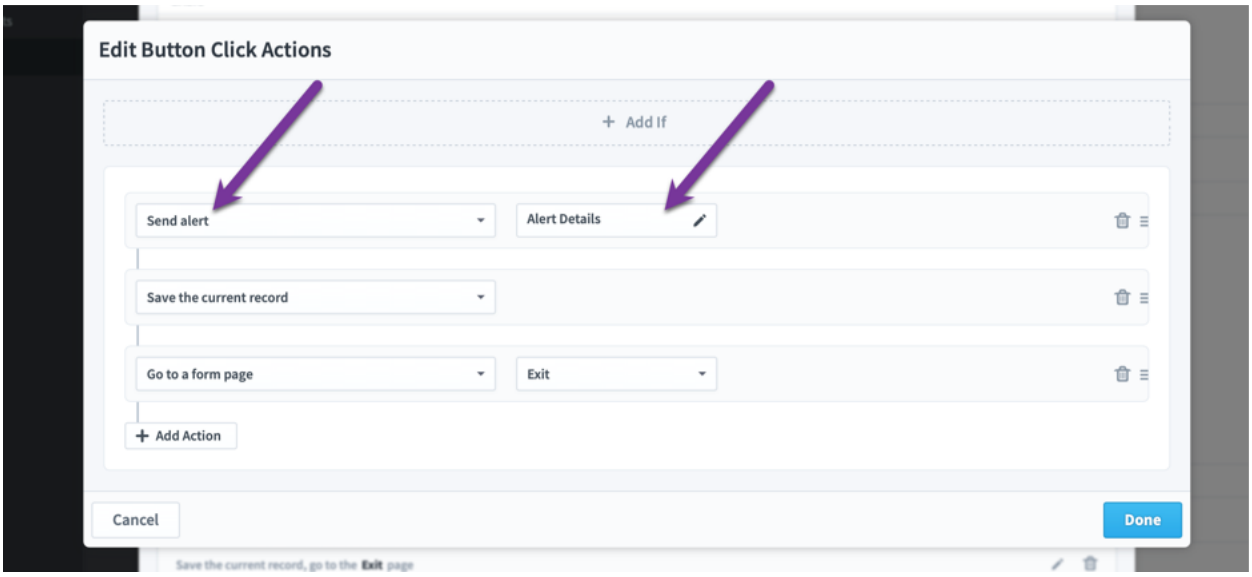


This enhancement allows you to change other form field values based on user input. For example, if they choose "Sales" for the department, the form could automatically fill in "Jane Johnson" for the Manager Name.

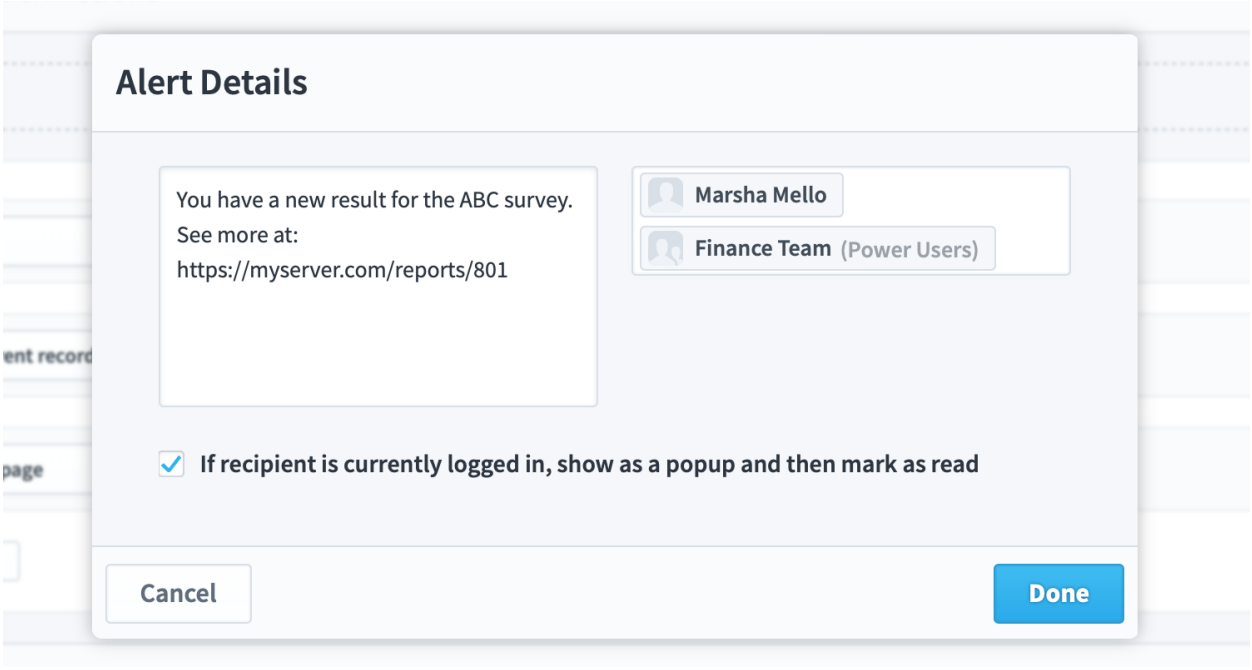
This enhancement also allows you to automatically track information about who filled out the form as well as when they submitted it. By saving the "Current Date and Time" on both initial form display and on form submission, you can even create calculated fields to determine how long the user spent filling out the form as well as which users abandoned the form before submitting.

Form action to send alert

Form actions run as users interact with forms, for example when a page is displayed, when a button is clicked, or when data is changed. This enhancement adds a new type of form action called "Send Alert".



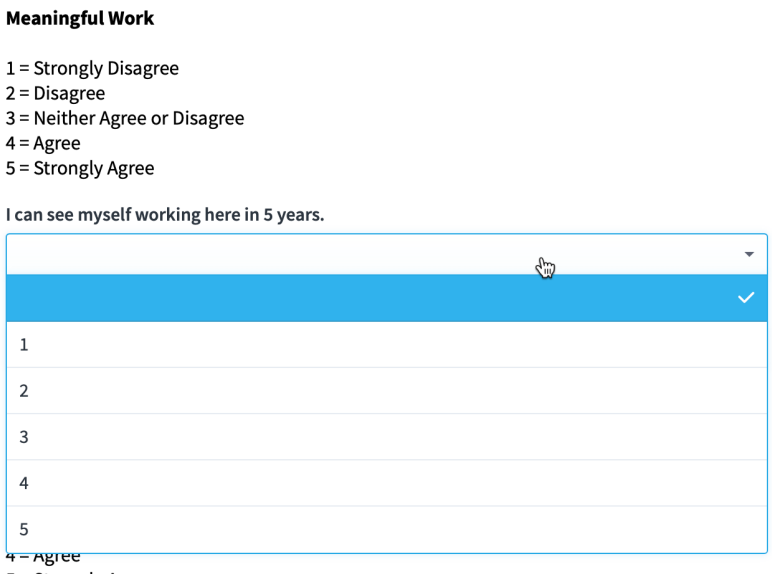
When run, this action sends a specific alert message to a pre-defined list of users and groups.



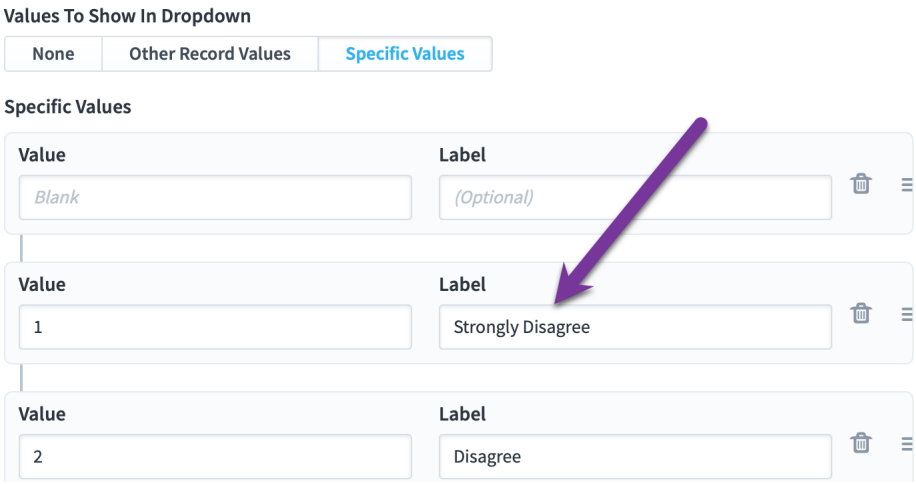
This allows form administrators to be notified when new records are added or existing records are modified. By leveraging the existing alert infrastructure, this enhancement allows alert recipients to receive alerts immediately, or to receive a single alert every day or week.

Labels for values in single value widgets

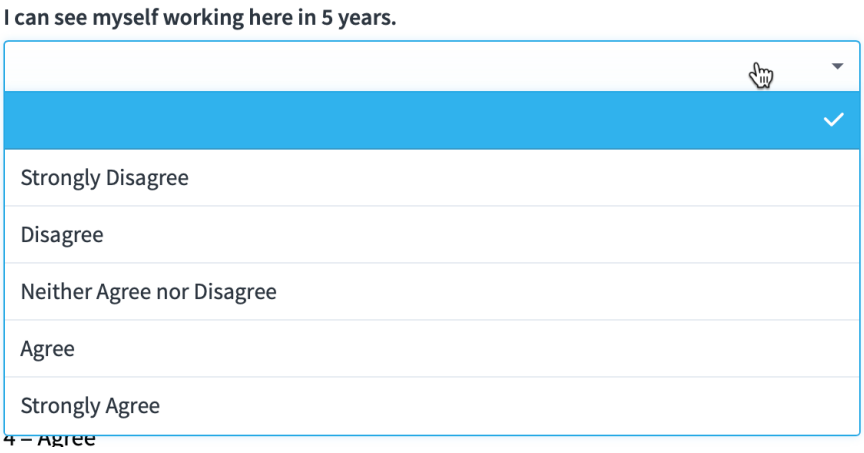
Forms save the exact values the people enter. In the past this has meant that surveys have needed people to select numbers so those numbers can be averaged for reporting.



Form administrators can now build forms with predefined labels for values, allowing text labels like this that correspond to underlying numerical values.

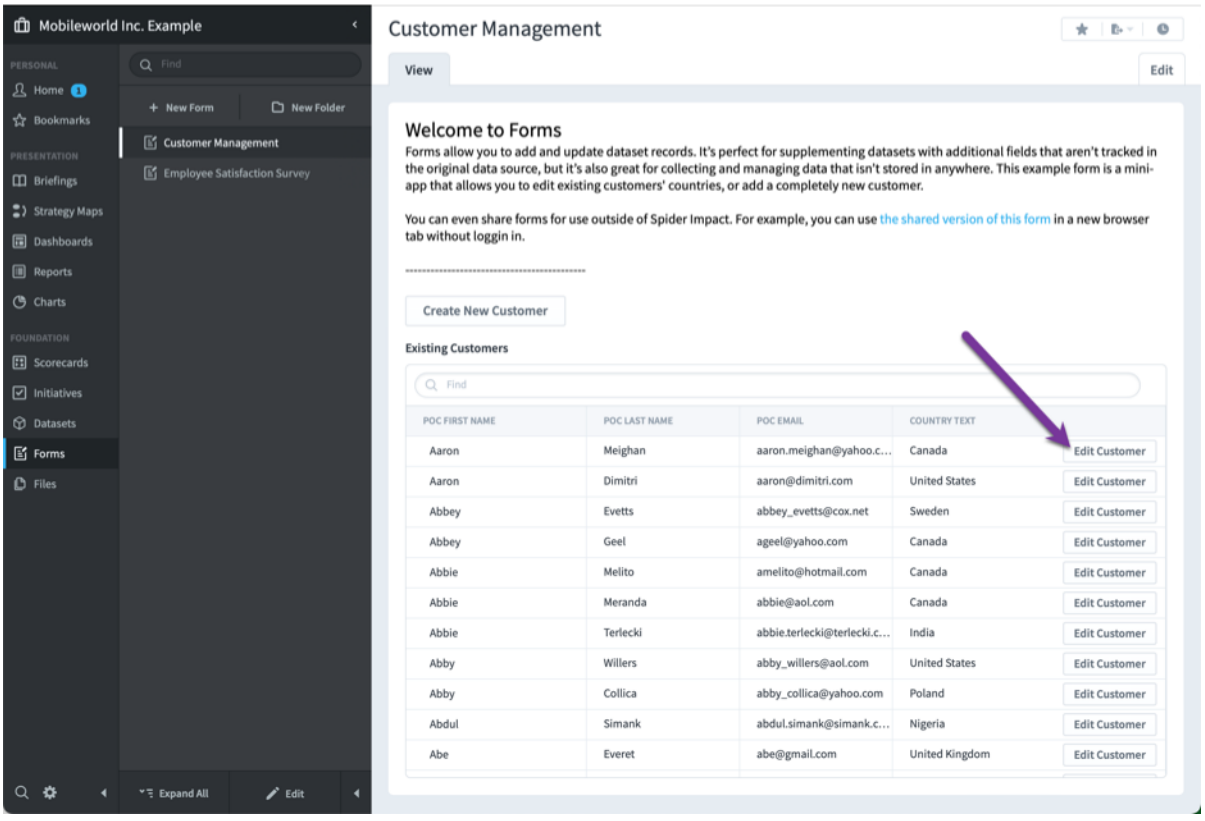


This eliminates the need for legends and simplifies forms so people can choose one value in a dropdown while another value is saved in the dataset.

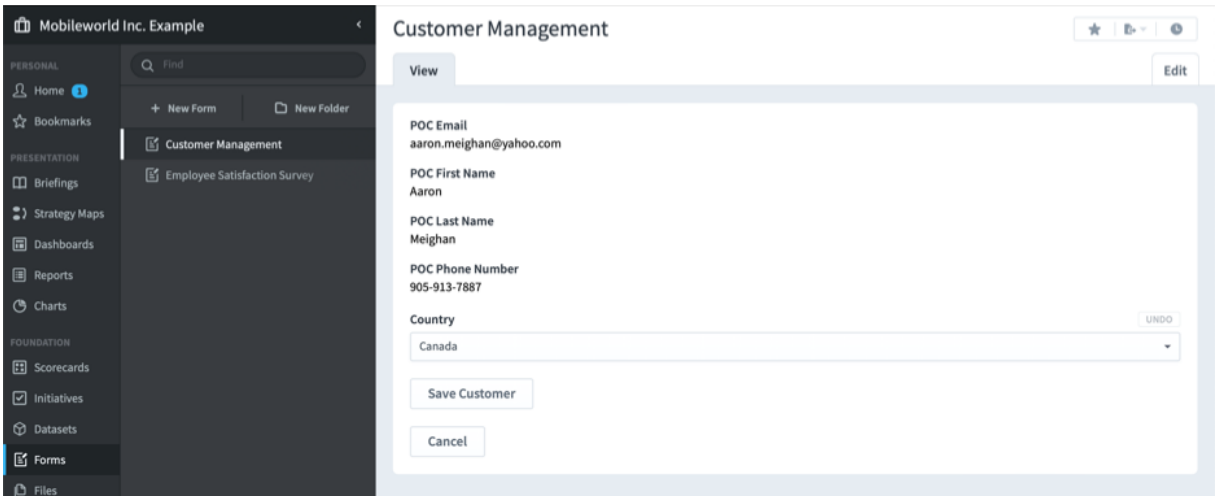


Form navigation tabs

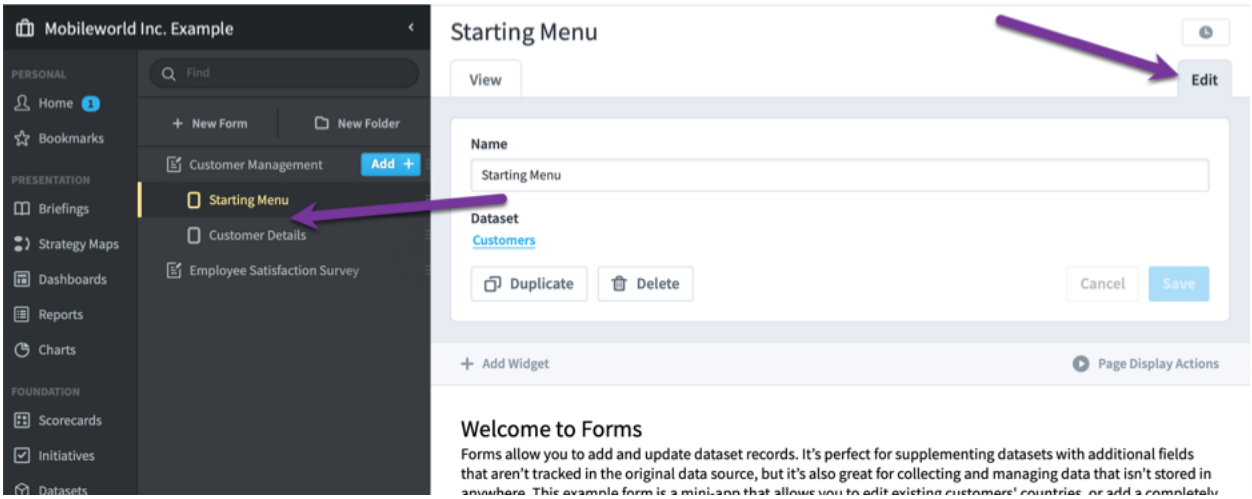
Users navigate between pages in multi-page forms by interacting with components like buttons or dropdown selects. For example, in this form the first page lists all customers, each with an "Edit Customer" button.



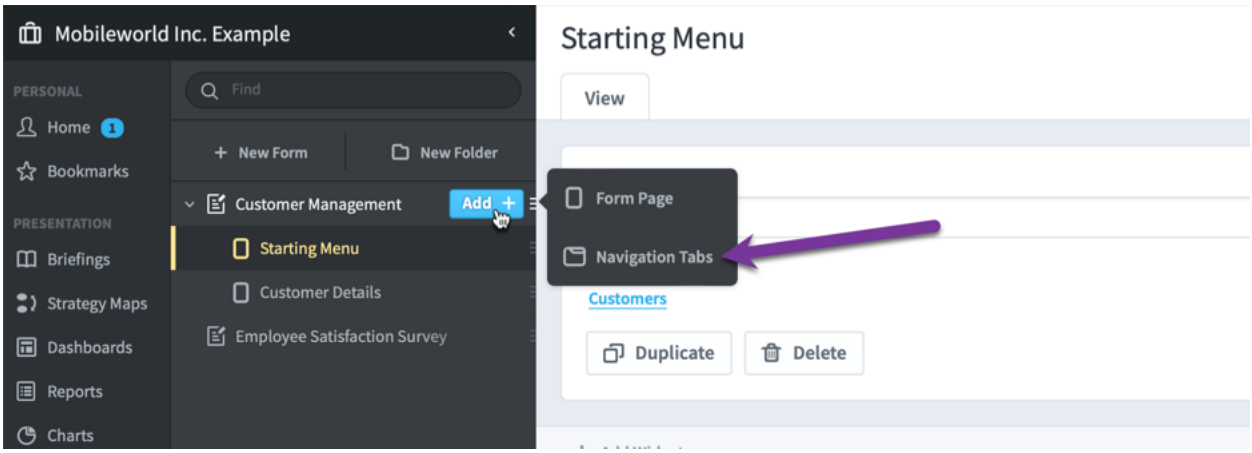
When you click the "Edit Customer" button, you are then taken to a second form page where you can see the customer's email, first name, last name, and phone number. You can also edit the customer's country.



When we click to the form's Edit tab, the two form pages now show under the form.

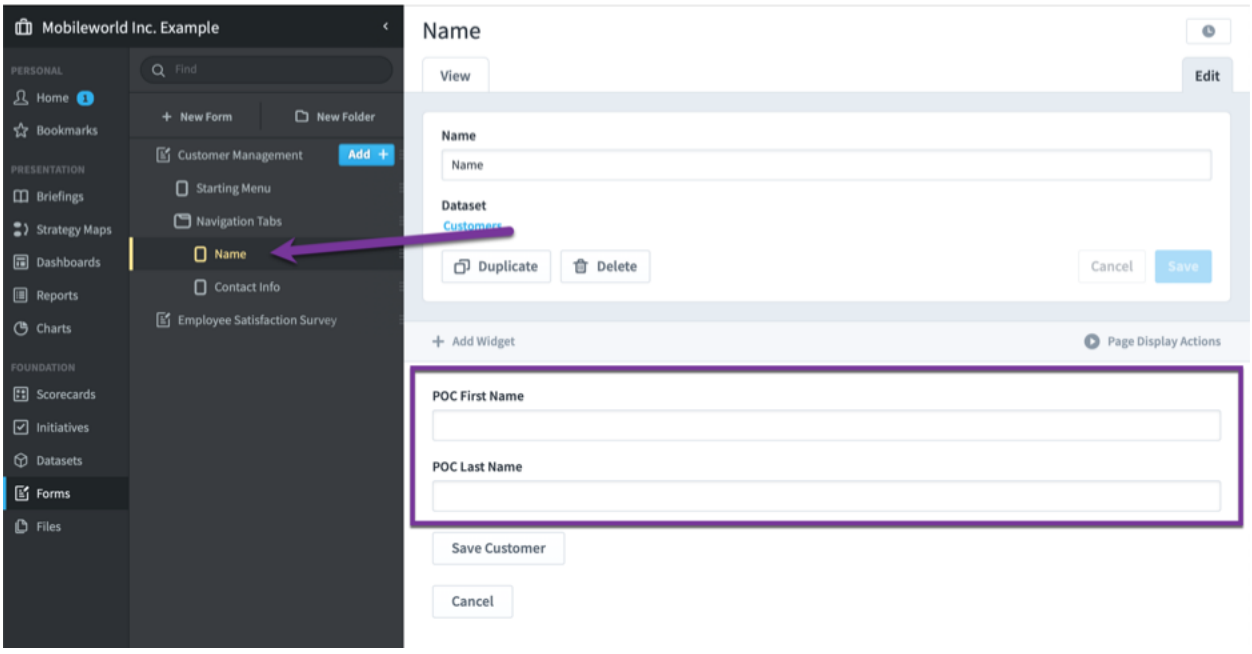


In the latest version of Spider Impact, there is now the ability to add navigation tabs to forms. These tabs support nonlinear navigation, allowing users to jump directly to specific form pages.

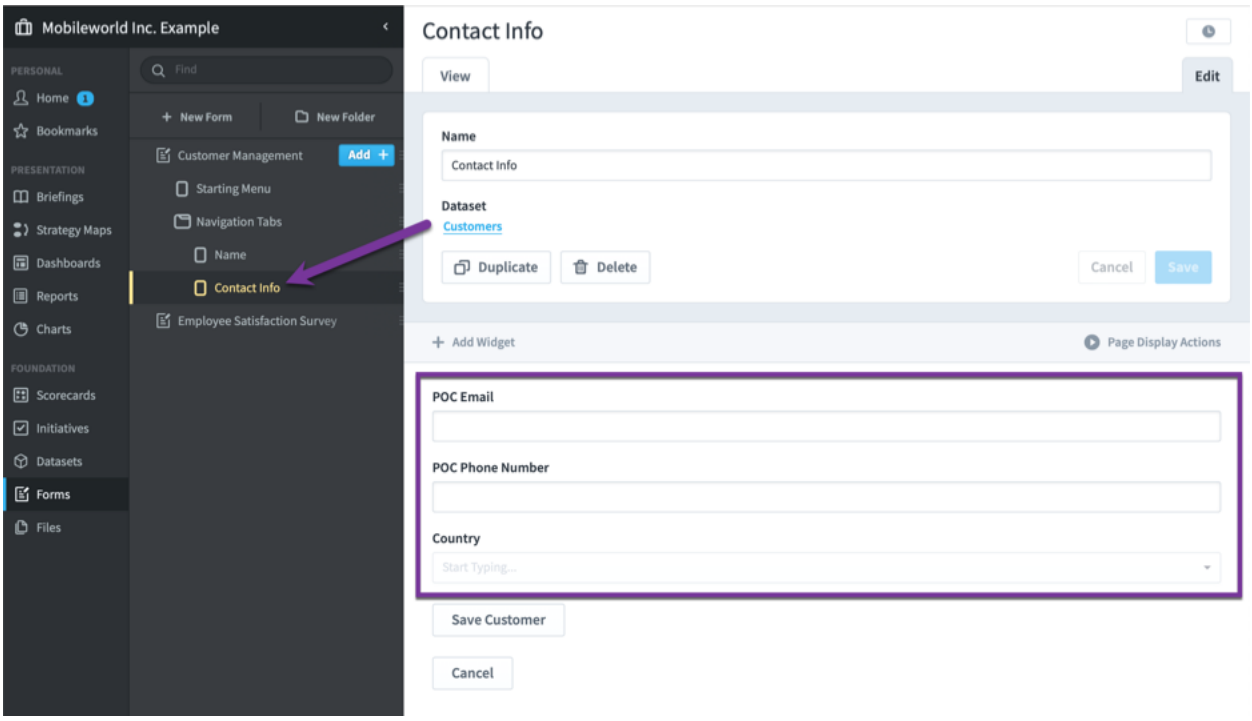


Adding tabs is simple. Just click the form's Add button and choose Navigation Tabs. This adds a navigation tabs item under the form. Then, any form pages you drag underneath the Navigation Tabs item will become tabs.

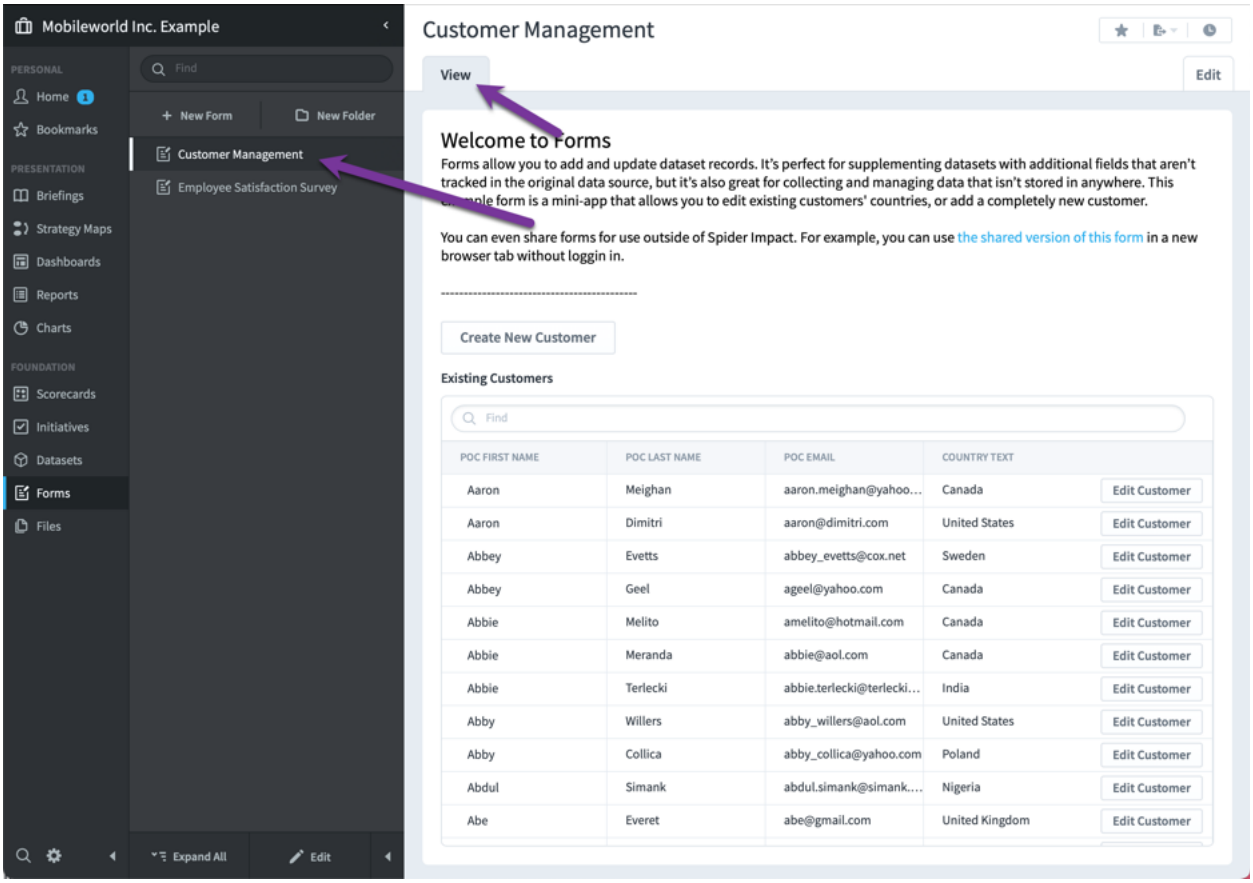
In this example we've added a Navigation Tabs item, split the Customer Details page into two separate pages, and then moved those two pages under Navigation Tabs. As you can see, our new Name page only shows two fields: First Name and Last Name.



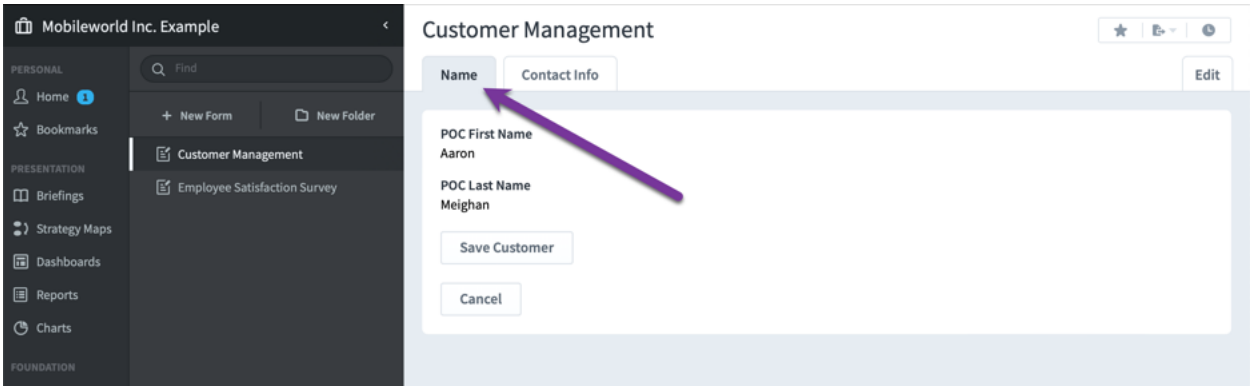
The Contact Info page has the other three fields: Email, Phone Number, and Country.



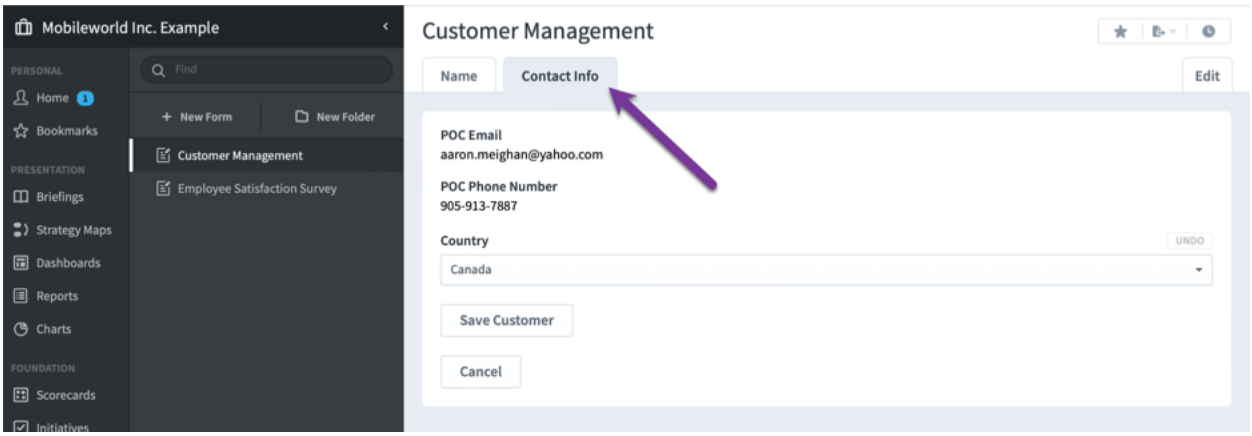
Now let's see this form in action. As before, when we click to the View tab, all of the form pages collapse under Customer Management.



When we click a row's Edit Customer button, however, the View tab changes to be two tabs: Name and Contact Info.



Name is selected, but we can also click to the Contact Info tab to see that form page.



In this example we started on a form page that wasn't inside of a navigation tabs item, but that doesn't have to be the case. Many forms will use tabs as their primary navigation with every form page as a separate tab.

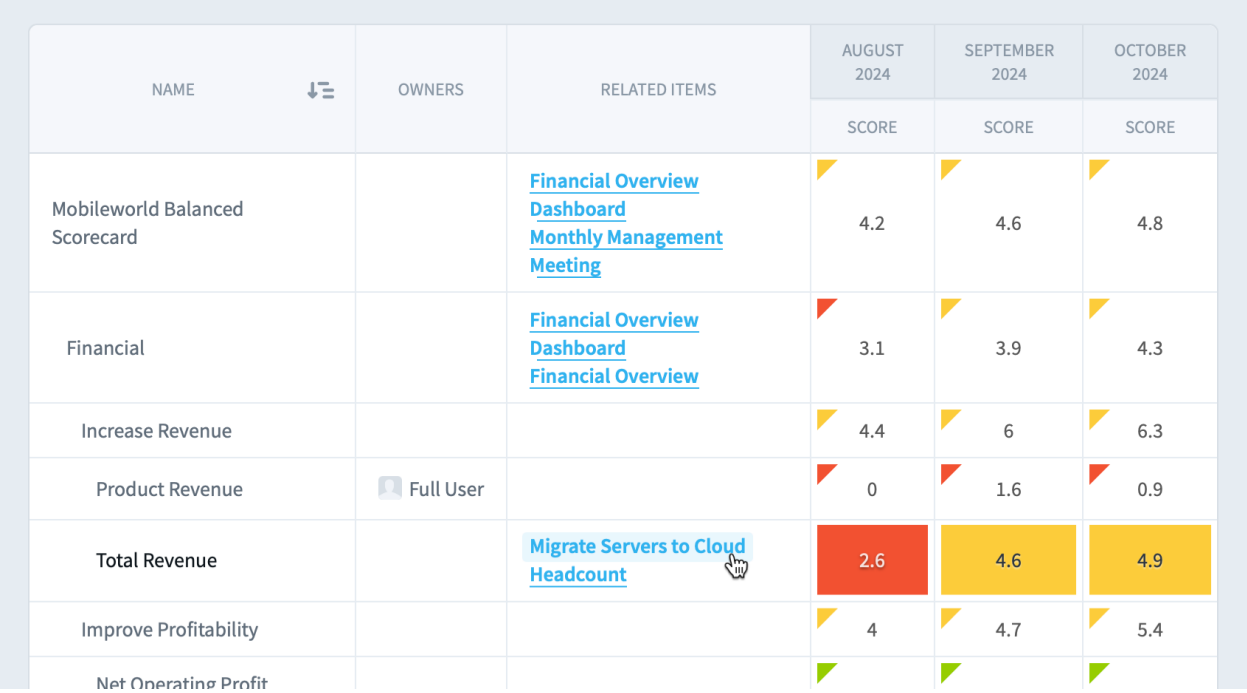
Improved form performance

Forms now perform much better with large amounts of data. Dropdown selects now work with over 50,000 values, and record list widgets can have editable fields even when showing tens of thousands of values.

Reports

Related items on scorecard reports

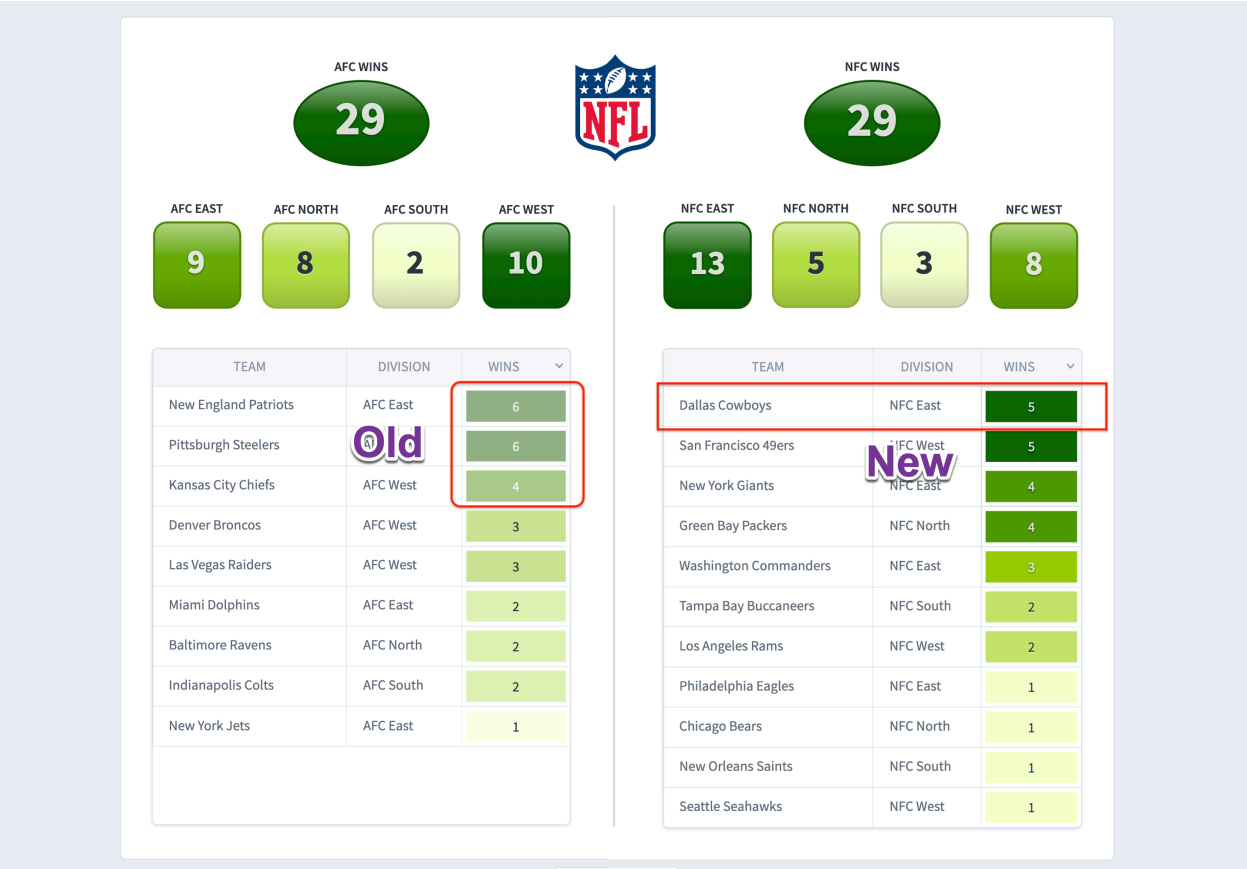
Scorecard reports can how show related items. This is very helpful for a variety of situations, including showing initiatives associated with balanced scorecard objectives.



NAME	OWNERS	RELATED ITEMS	AUGUST 2024 SCORE	SEPTEMBER 2024 SCORE	OCTOBER 2024 SCORE
Mobileworld Balanced Scorecard		Financial Overview Dashboard Monthly Management Meeting	4.2	4.6	4.8
Financial		Financial Overview Dashboard Financial Overview	3.1	3.9	4.3
Increase Revenue			4.4	6	6.3
Product Revenue	Full User		0	1.6	0.9
Total Revenue		Migrate Servers to Cloud Headcount	2.6	4.6	4.9
Improve Profitability			4	4.7	5.4
Net Operating Profit					

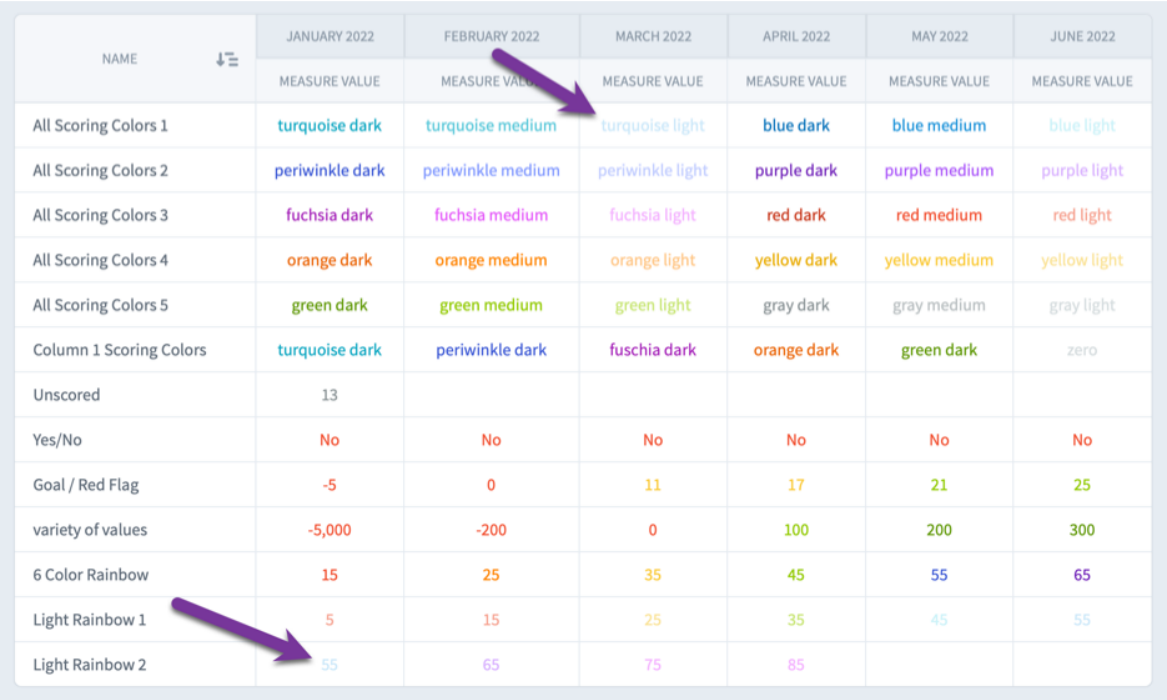
Full colors on report cell backgrounds

Historically, background colors in report cells were shown with muted colors so that text was easier to read. The need for muted colors changed recently, however, because text shown on dark colors now automatically switches to white. These muted background colors further felt out of place when compared against the new conditionally colored shapes. Because of this, report cell backgrounds are now shown in full color, matching shapes and other conditionally colored things in the software.



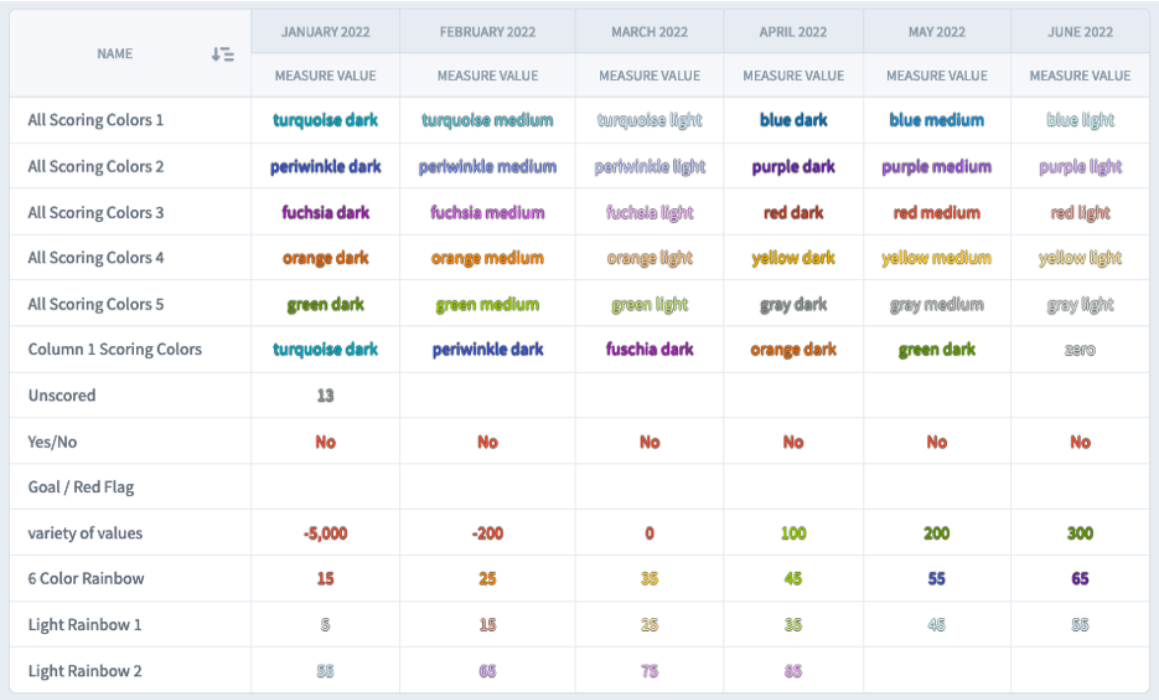
Improved appearance of conditionally colored text

Performance is often visualized in reports by showing colored cell backgrounds, but you can also choose to show colored text. This works well for many colors, but this historically meant that very light colors were difficult to read.



NAME	JANUARY 2022	FEBRUARY 2022	MARCH 2022	APRIL 2022	MAY 2022	JUNE 2022
	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE
All Scoring Colors 1	turquoise dark	turquoise medium	turquoise light	blue dark	blue medium	blue light
All Scoring Colors 2	periwinkle dark	periwinkle medium	periwinkle light	purple dark	purple medium	purple light
All Scoring Colors 3	fuchsia dark	fuchsia medium	fuchsia light	red dark	red medium	red light
All Scoring Colors 4	orange dark	orange medium	orange light	yellow dark	yellow medium	yellow light
All Scoring Colors 5	green dark	green medium	green light	gray dark	gray medium	gray light
Column 1 Scoring Colors	turquoise dark	periwinkle dark	fuschia dark	orange dark	green dark	zero
Unscored	13					
Yes/No	No	No	No	No	No	No
Goal / Red Flag	-5	0	11	17	21	25
variety of values	-5,000	-200	0	100	200	300
6 Color Rainbow	15	25	35	45	55	65
Light Rainbow 1	5	15	25	35	45	55
Light Rainbow 2	55	65	75	85		

To accommodate this, all colored text in reports was then changed to be shown with shadows. This improved the readability of light colors but was an unneeded change for all the other colors.



NAME	JANUARY 2022	FEBRUARY 2022	MARCH 2022	APRIL 2022	MAY 2022	JUNE 2022
	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE
All Scoring Colors 1	turquoise dark	turquoise medium	turquoise light	blue dark	blue medium	blue light
All Scoring Colors 2	periwinkle dark	periwinkle medium	periwinkle light	purple dark	purple medium	purple light
All Scoring Colors 3	fuchsia dark	fuchsia medium	fuchsia light	red dark	red medium	red light
All Scoring Colors 4	orange dark	orange medium	orange light	yellow dark	yellow medium	yellow light
All Scoring Colors 5	green dark	green medium	green light	gray dark	gray medium	gray light
Column 1 Scoring Colors	turquoise dark	periwinkle dark	fuschia dark	orange dark	green dark	zero
Unscored	13					
Yes/No	No	No	No	No	No	No
Goal / Red Flag						
variety of values	-5,000	-200	0	100	200	300
6 Color Rainbow	15	25	35	45	55	65
Light Rainbow 1	5	15	25	35	45	55
Light Rainbow 2	55	65	75	85		

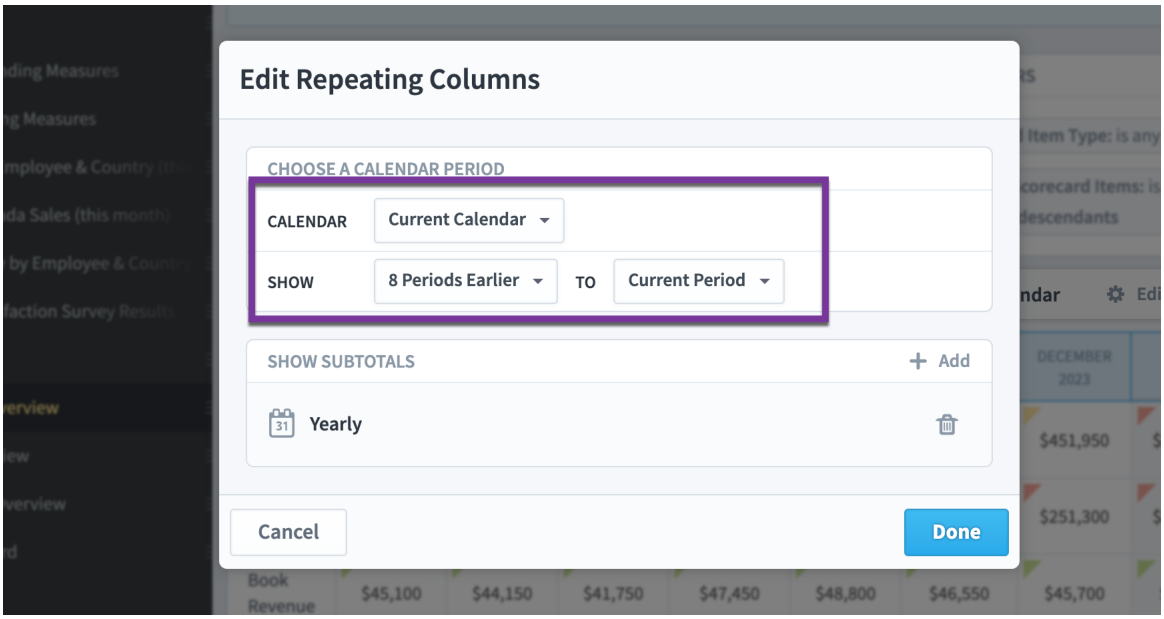
In the latest version of Spider Impact, only very light colors have shadows. These light colors are very uncommon, so most reports with colored text will display with no shadowed text.

NAME	JANUARY 2022	FEBRUARY 2022	MARCH 2022	APRIL 2022	MAY 2022	JUNE 2022
	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE	MEASURE VALUE
All Scoring Colors 1	turquoise dark	turquoise medium	turquoise light	blue dark	blue medium	blue light
All Scoring Colors 2	periwinkle dark	periwinkle medium	periwinkle light	purple dark	purple medium	purple light
All Scoring Colors 3	fuchsia dark	fuchsia medium	fuchsia light	red dark	red medium	red light
All Scoring Colors 4	orange dark	orange medium	orange light	yellow dark	yellow medium	yellow light
All Scoring Colors 5	green dark	green medium	green light	gray dark	gray medium	gray light
Column 1 Scoring Colors	turquoise dark	periwinkle dark	fuschia dark	orange dark	green dark	zero
Unscored	13					
Yes/No	No	No	No	No	No	No
Goal / Red Flag	-5	0	11	17	21	25
variety of values	-5,000	-200	0	100	200	300
6 Color Rainbow	15	25	35	45	55	65
Light Rainbow 1	5	15	25	35	45	55
Light Rainbow 2	85	65	75	85		

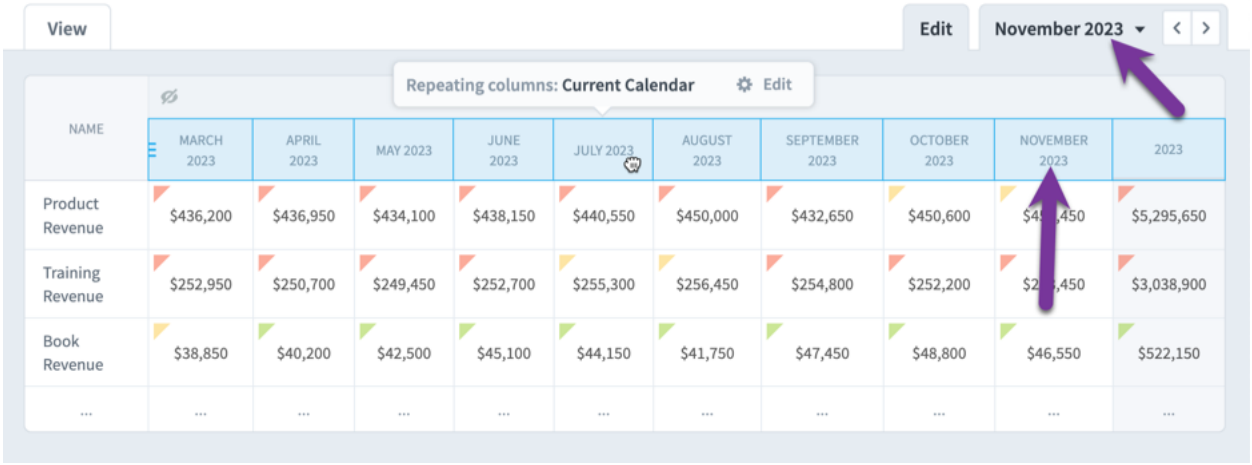
Relative report dates in briefings

When you add reports to briefings, all relative calendar period ranges now refer to the slide settings, not the main calendar period selector. This makes reports behave more like every other section in Spider Impact. This behavior can be a little nuanced, so we'll explain with an example.

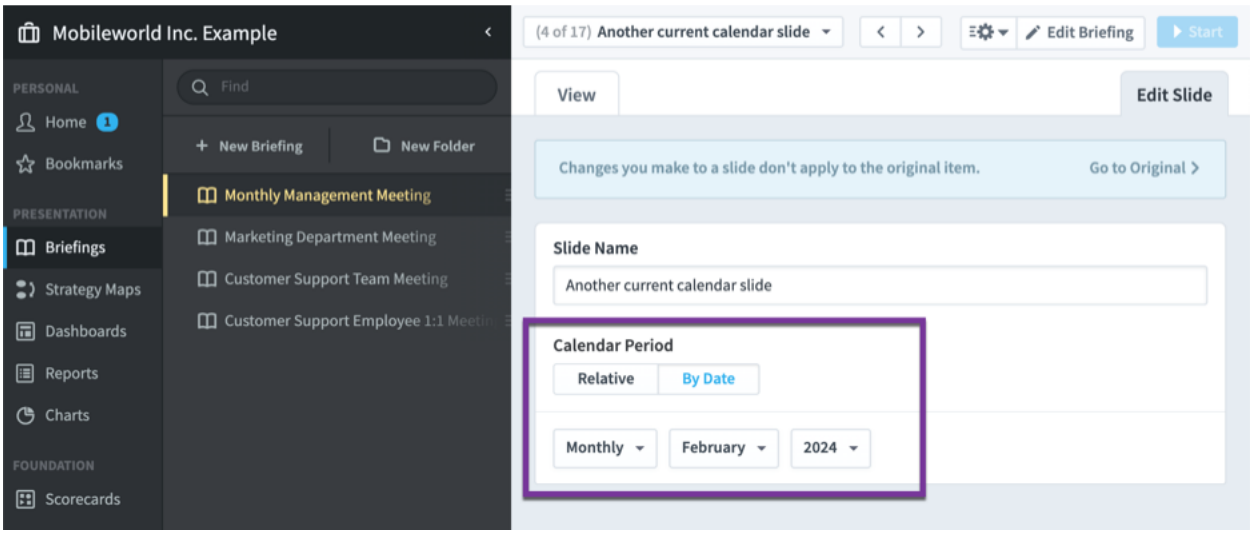
It is very common to repeat report columns by a calendar period. In this example we're repeating a column 9 times. It will show data 8 periods earlier through the current period.



This is what that report looks like in action. The application's calendar period selector is November 2023, so the report shows data for every month from March 2023 to the current period of November 2023.



When you add reports to briefings, however, this relative calendar period range now refers to the slide settings, not the main calendar period selector. In this example we're setting the slide to show data for February 2024.

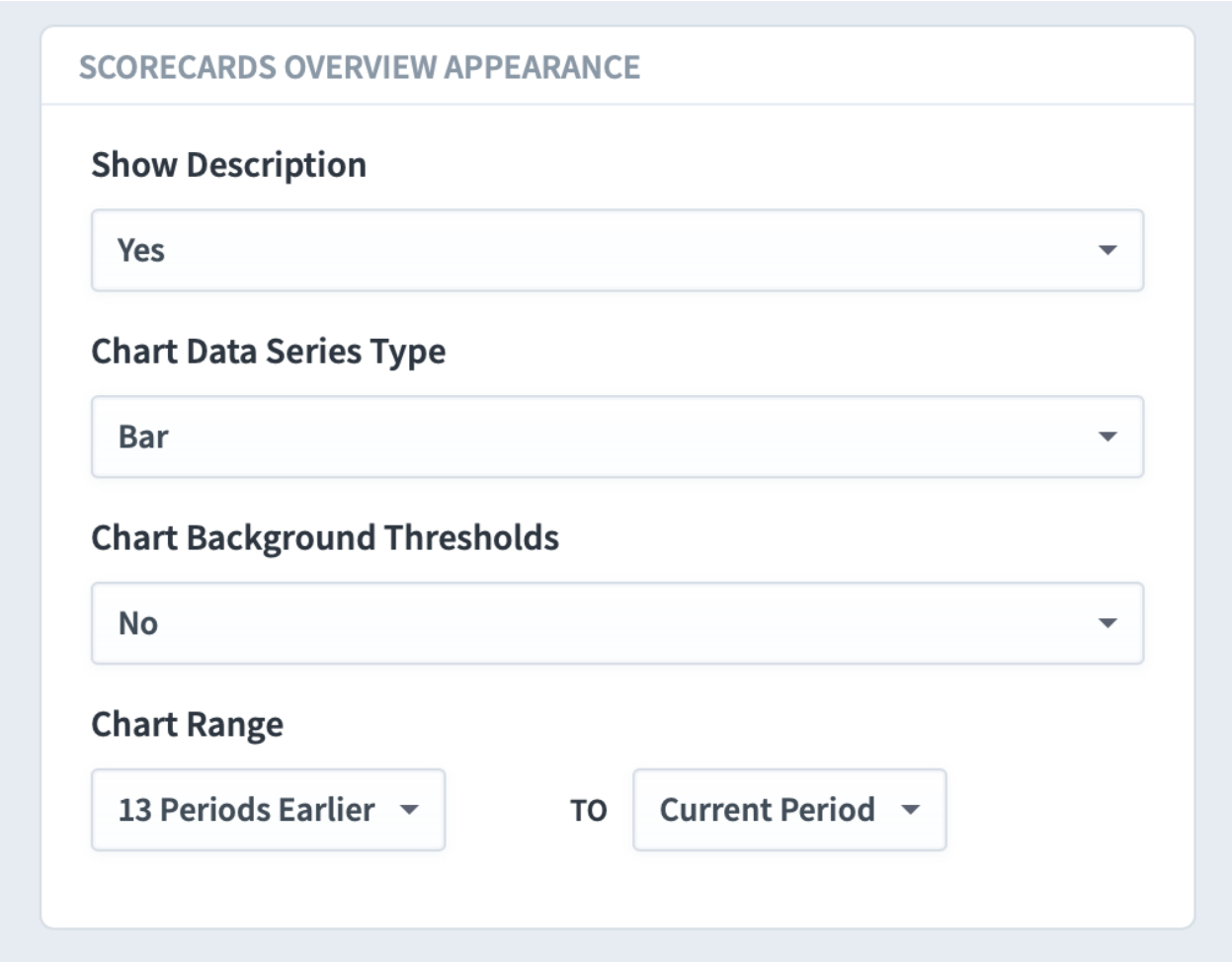


When we view this briefing slide, our report now uses February 2024 as the current period, so it shows data from June 2023 to February 2024.

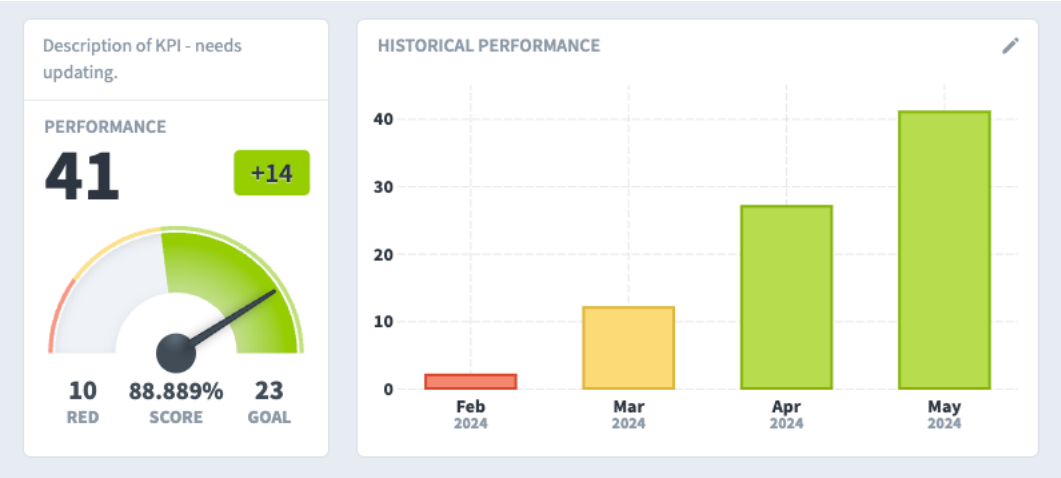
Scorecards

Customizing Scorecards Overview

There are now setting in the Administration section that allow you to configure the default appearance of the Scorecards Overview tab.

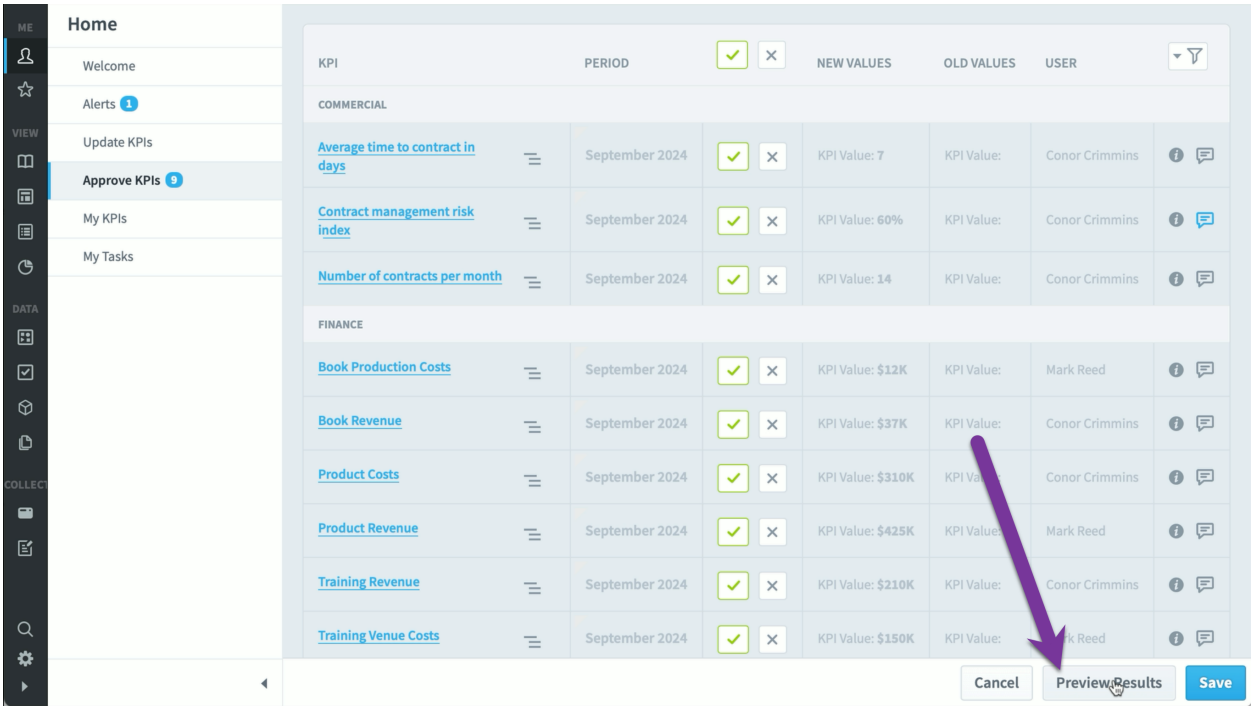


In this example we've set the description to show, and we're charting 4 periods on a bar chart with no background thresholds.

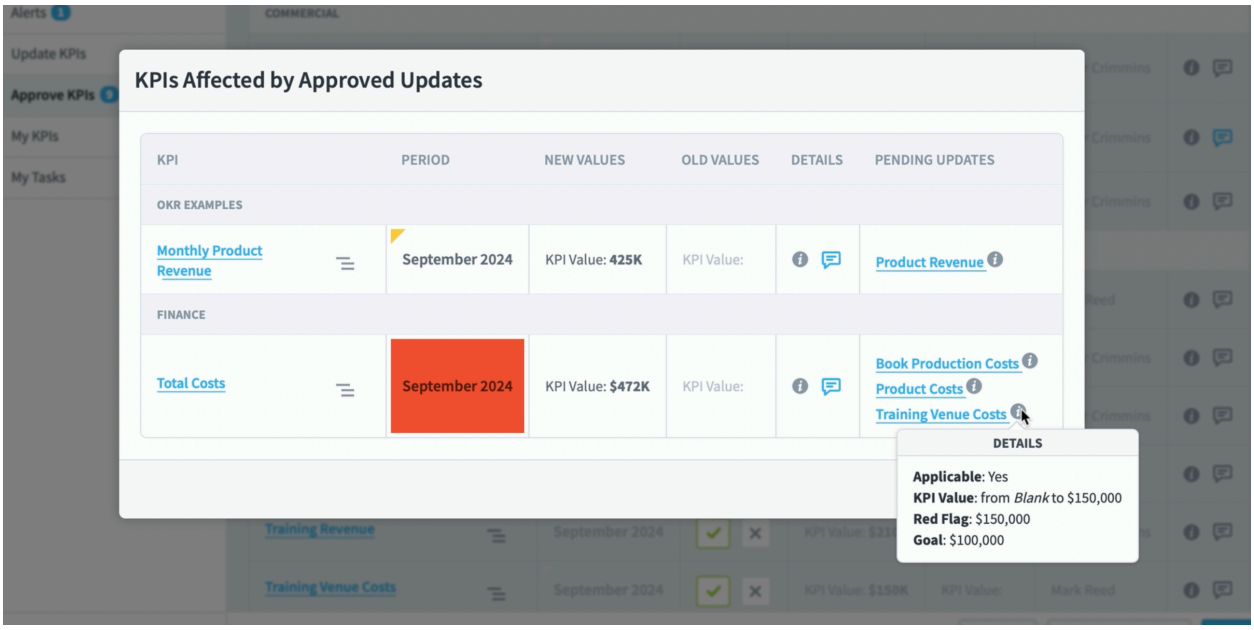


Previewing results before approving KPI values

The "Require Owner Approval For KPI Value Updates" setting in Application Administration defaults off, but when enabled requires a KPI's owner to approve value updates before they appear to everyone in the software. When approving these KPI values, there is now a "Preview Results" button.



Clicking this button shows a dialog telling you what will happen if your pending approvals and rejections are saved. Each row represents a calculated KPI value affected by the pending updates. The far-right column shows you which of the pending updates is affecting that calculated value. As you can see, hovering over the info icon shows the details of the pending updates.



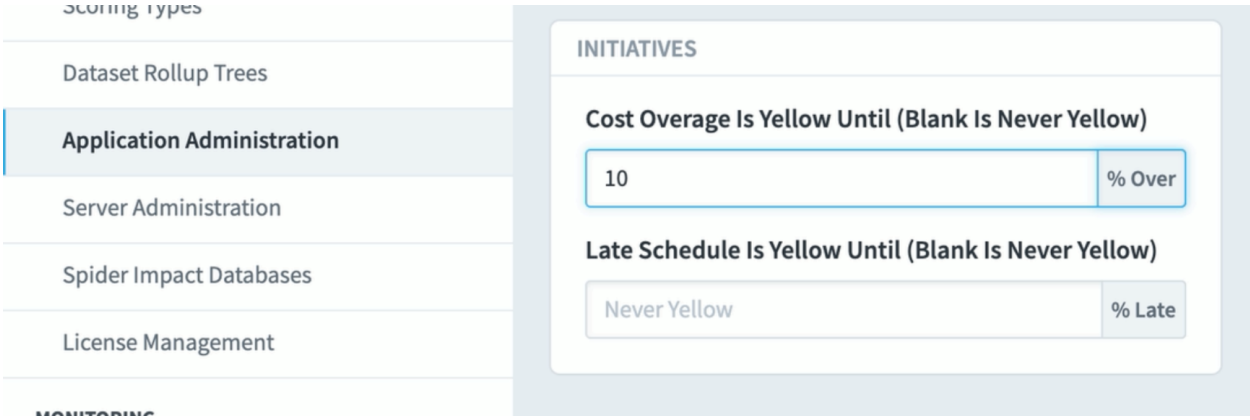
This ability to preview results allows a KPI owner to have full visibility into what will happen if KPI value updates are approved.

Initiatives

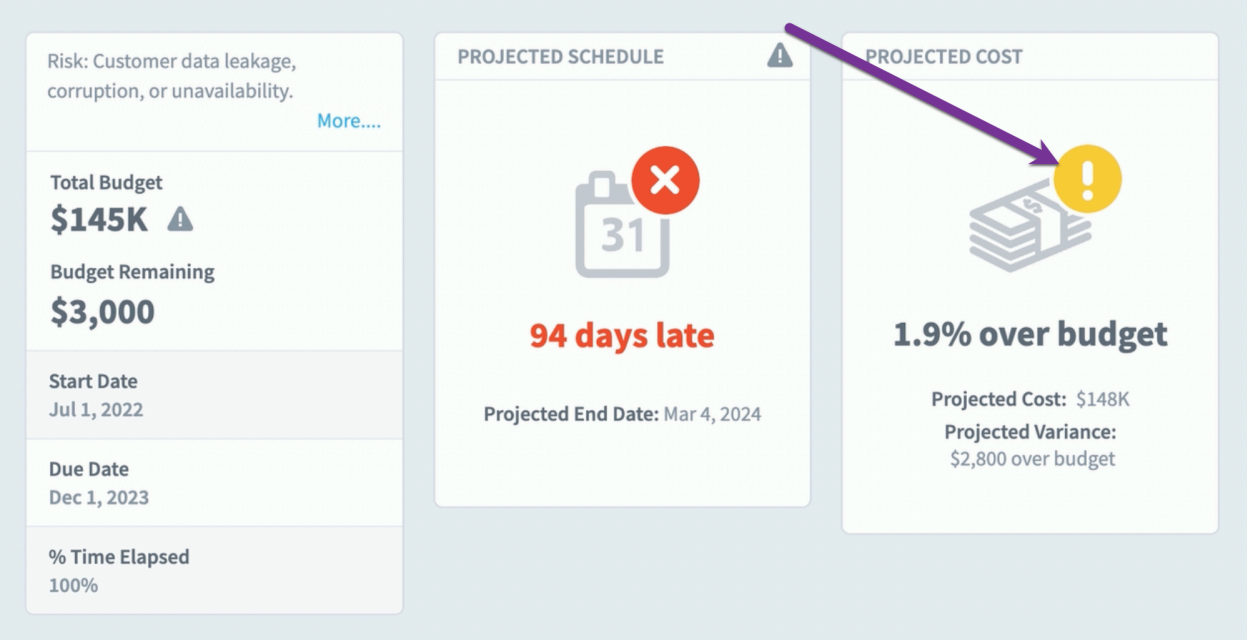
Yellow initiative ranges

Traditionally, an initiative's schedule is red if it's even one day late, and its cost is red even if it's a very small amount over budget. Initiatives could only be red or green.

There is now an Initiatives section in Application Administration that allows you to set a yellow percentage for both cost and schedule. This allows your initiatives to be yellow when you're within a percentage of the total. In this example we're saying that cost overages of up to 10% are yellow.



This is what a slight overage looks like in the software.



The overall initiative performance color is still determined by taking the worse color of cost and schedule. So, in the example above the overall initiative will be red because its projected schedule is red.

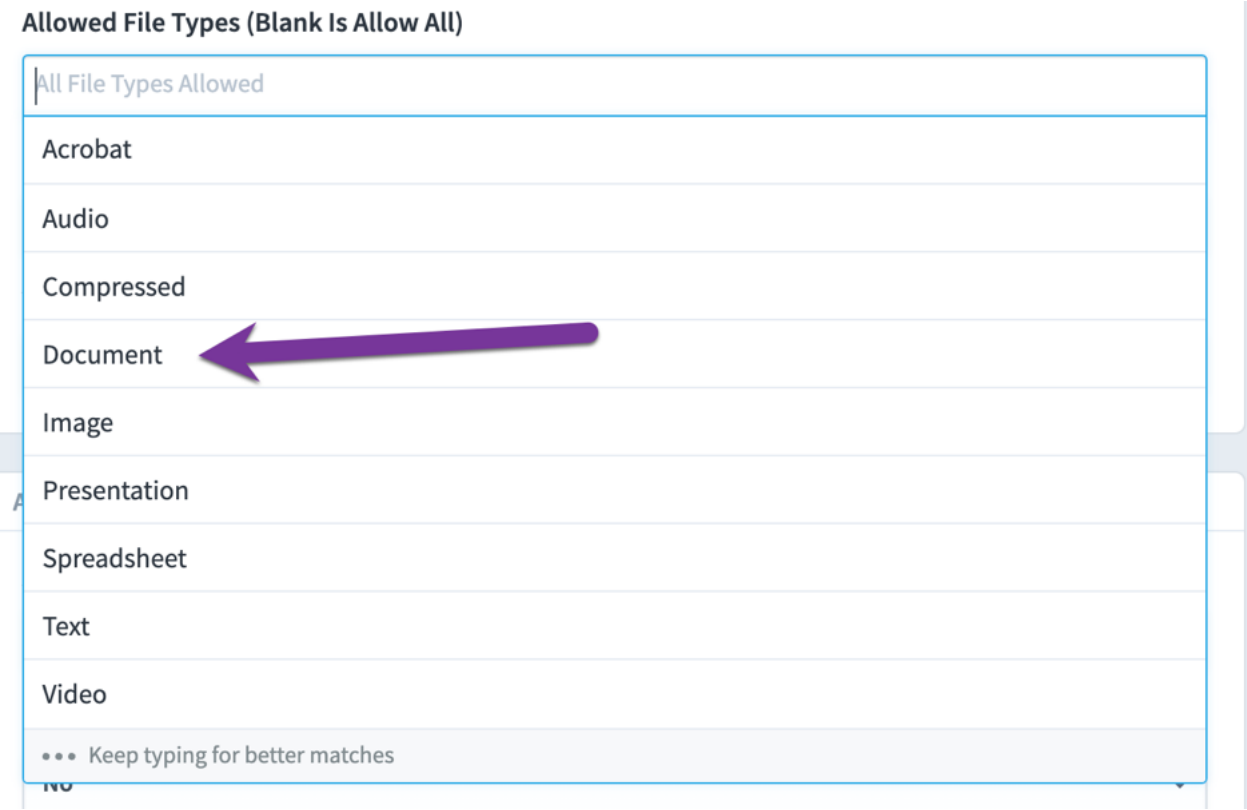
Showing colors in initiative reports

The Color column in initiative reports can now show the performance color in formatting in addition to displaying the text value of the color.

Files

Visio files are now documents for upload restrictions

Application Administrators can restrict which types of files can be uploaded in the Files section. One of these file types is "Document" which includes Word documents, Pages documents, and rich text file documents.



Spider Impact now also considers Visio files as Documents, which include files with extensions of vsd, vsdx, vsdm, vst, vstx, vstm, vss, vssx, vssm, vsw, vdw, vdx, vsx, vtx, and vsl.

Permissions

Organization permissions from rollup trees

You can now give organization-level permissions to rollup tree groups. Roles and permissions are centrally managed, allowing for deployments at a scale that was previously impossible. This means you can now easily create scorecards, dashboards, and reports for every department or employee in your organization.

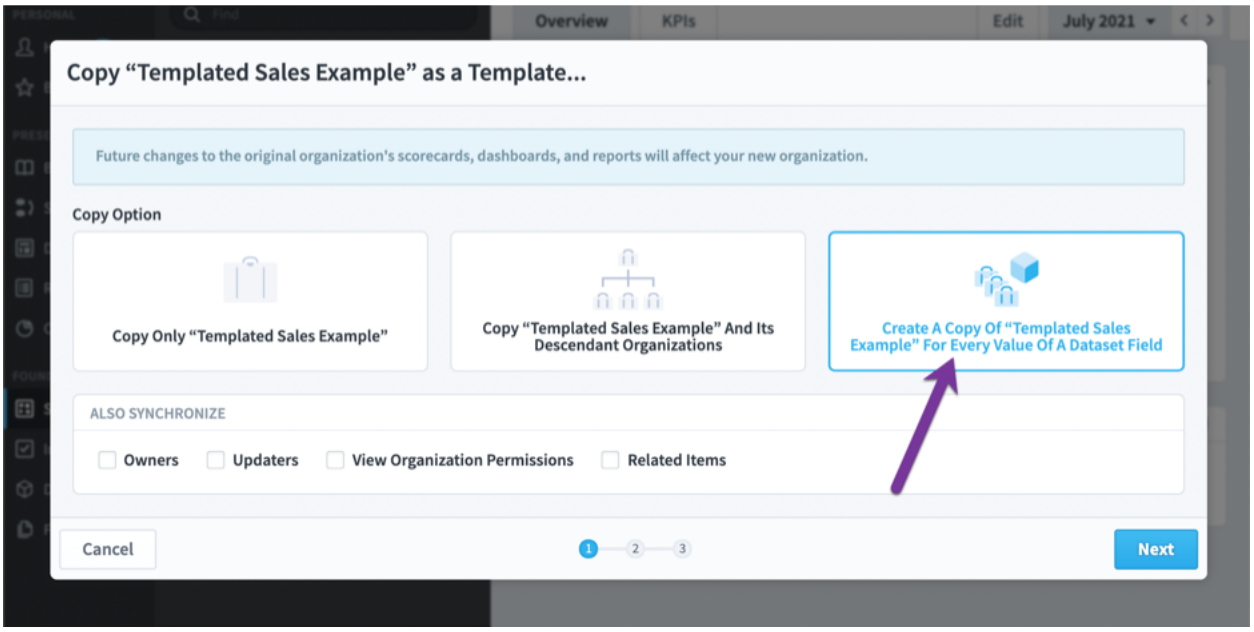
All of this is built on existing dataset rollup tree functionality, so please see that support article if you're unfamiliar with dataset rollup trees or dataset rollup tree groups.

https://support.spiderstrategies.com/hc/en-us/articles/4408581972116-Advanced-Dataset-Rollup-Trees

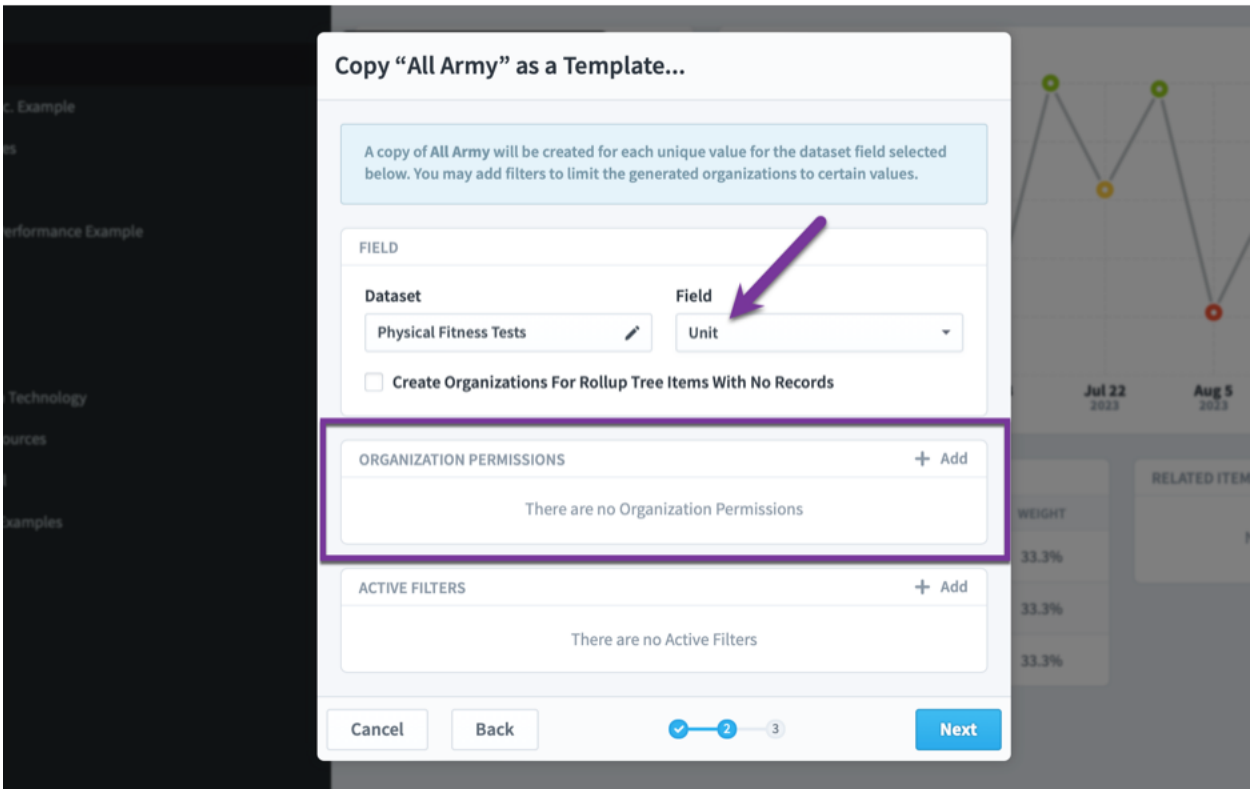
It also uses templated organizations from datasets, so be sure to read that support article if you're unfamiliar with that concept.

https://support.spiderstrategies.com/hc/en-us/articles/4408587108884-Templated-Organizations-from-Datasets

In this example, we'll create templated organizations based on dataset field values, as we were able to do before.

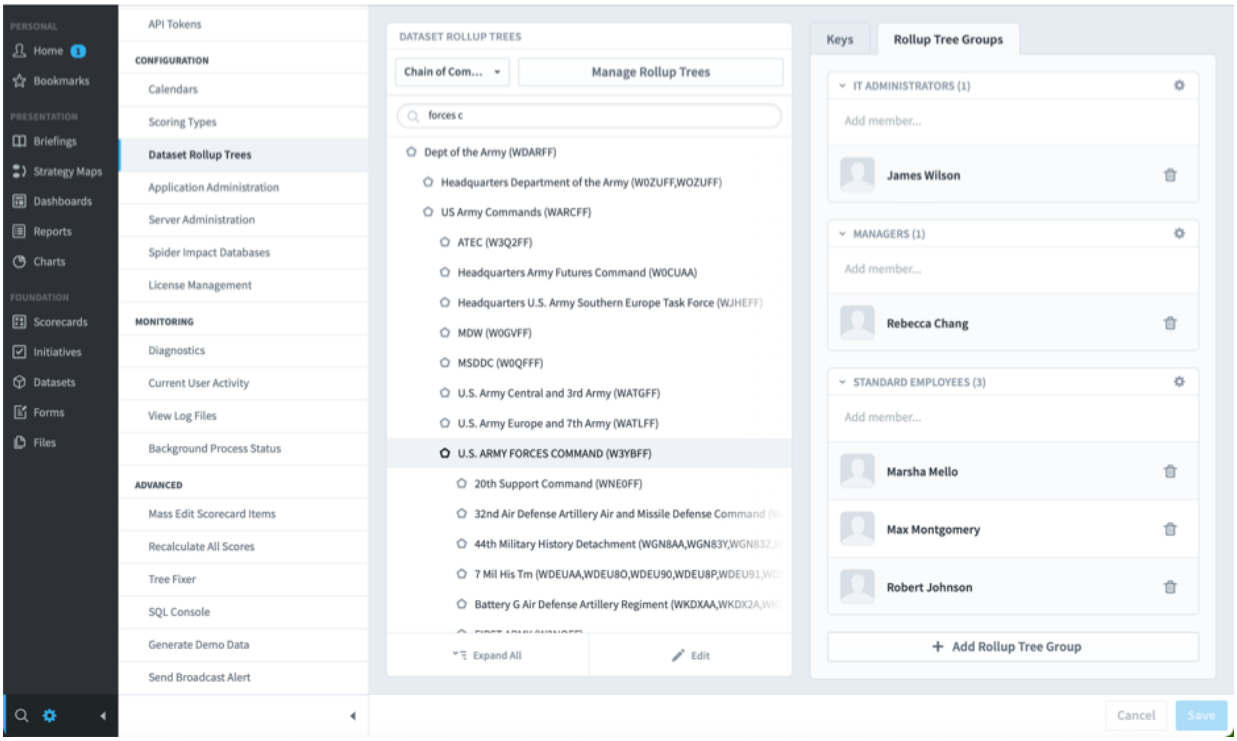


This time, however, we'll choose the "Unit" field, which is a rollup tree field. As soon as we choose this rollup tree field, the Organization Permissions panel appears. This panel allows you to assign permissions to the new templated organization copies that we're creating based on membership in rollup tree groups.

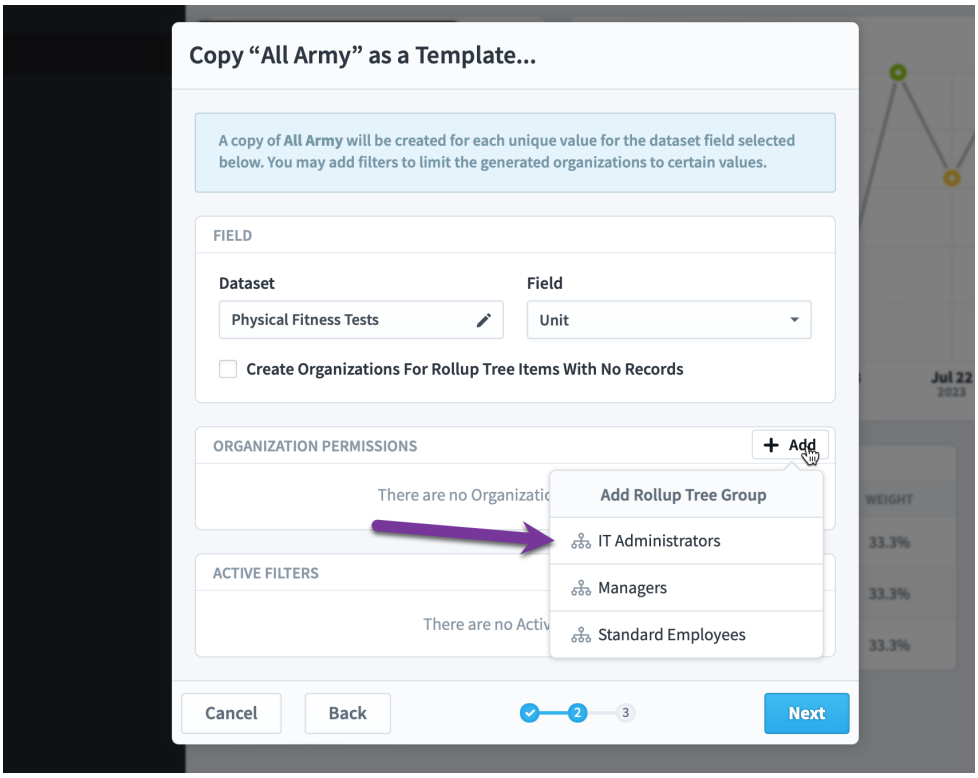


If you're not familiar with dataset rollup tree groups, we'd recommend reading the "Dataset Rollup Tree Groups" section of the Dataset Rollup Trees support article. The general idea, however, is that you can assign people to different types of positions at different levels of your rollup tree.

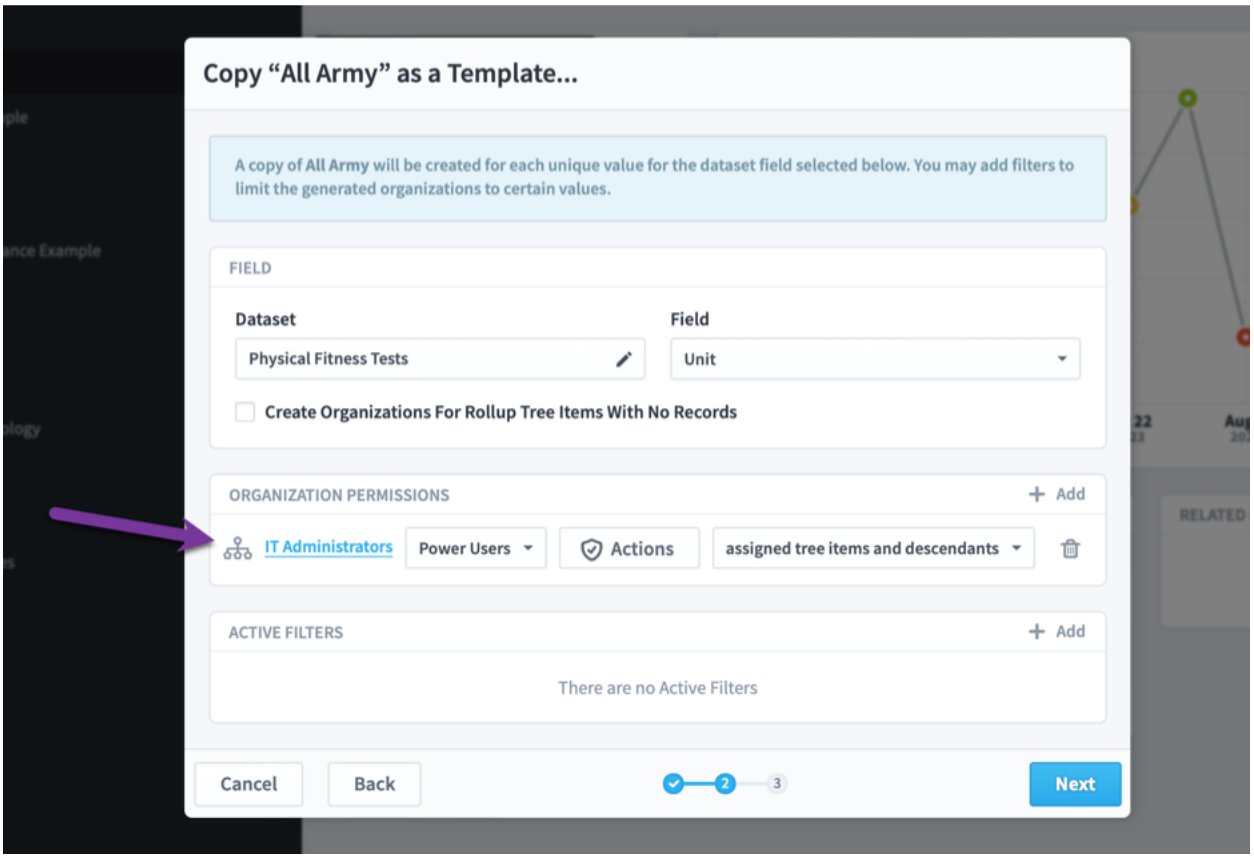
These dataset rollup groups make more sense when you see them in action in the Administration section. Here we have a rollup tree based on military units, but your rollup tree could easily be your company's org chart, or thousands of retail stores organized into regions. As you can see, we've selected the "Forces Command" item in the rollup tree, and we've added one person as an IT Administrator, one person as a Manager, and three people as standard employees. At every level of the rollup tree, we can assign different people to these three rollup tree groups.



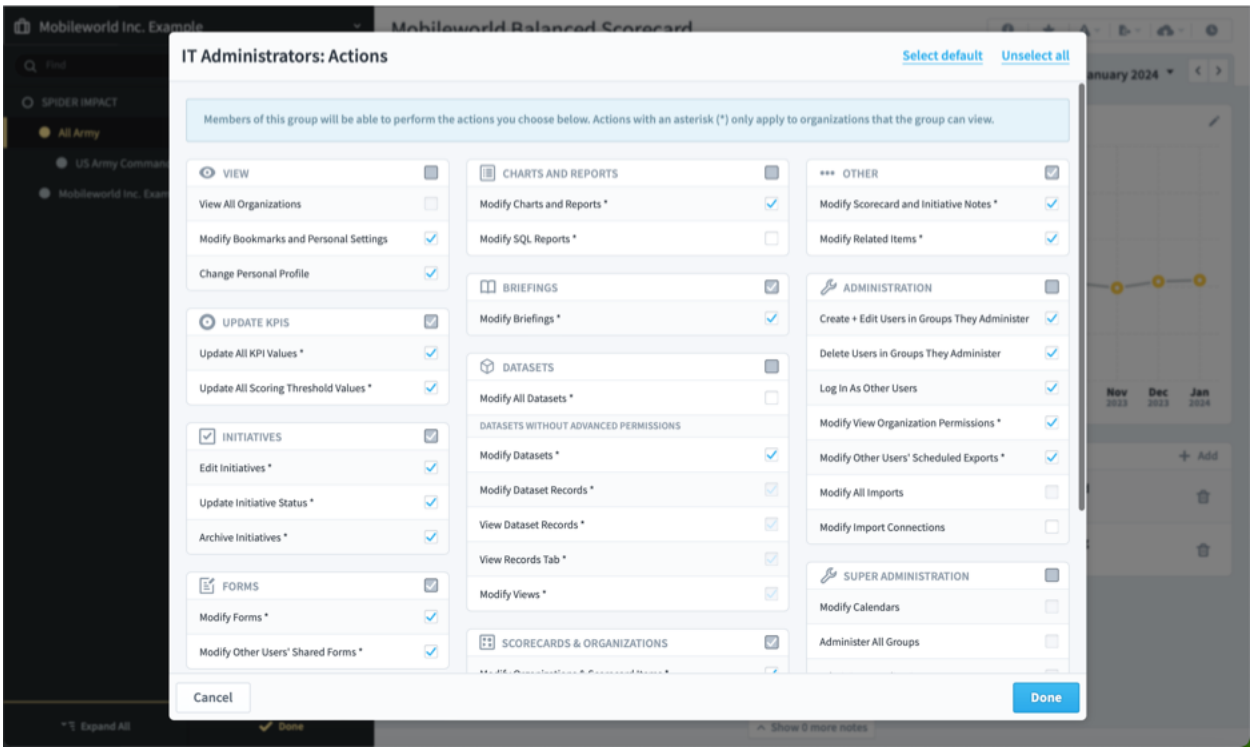
With that explanation out of the way, let's go back to creating our templated organizations. Because we've selected a rollup field, the Organization Permissions panel shows, and we can add the IT Administrators rollup tree group.



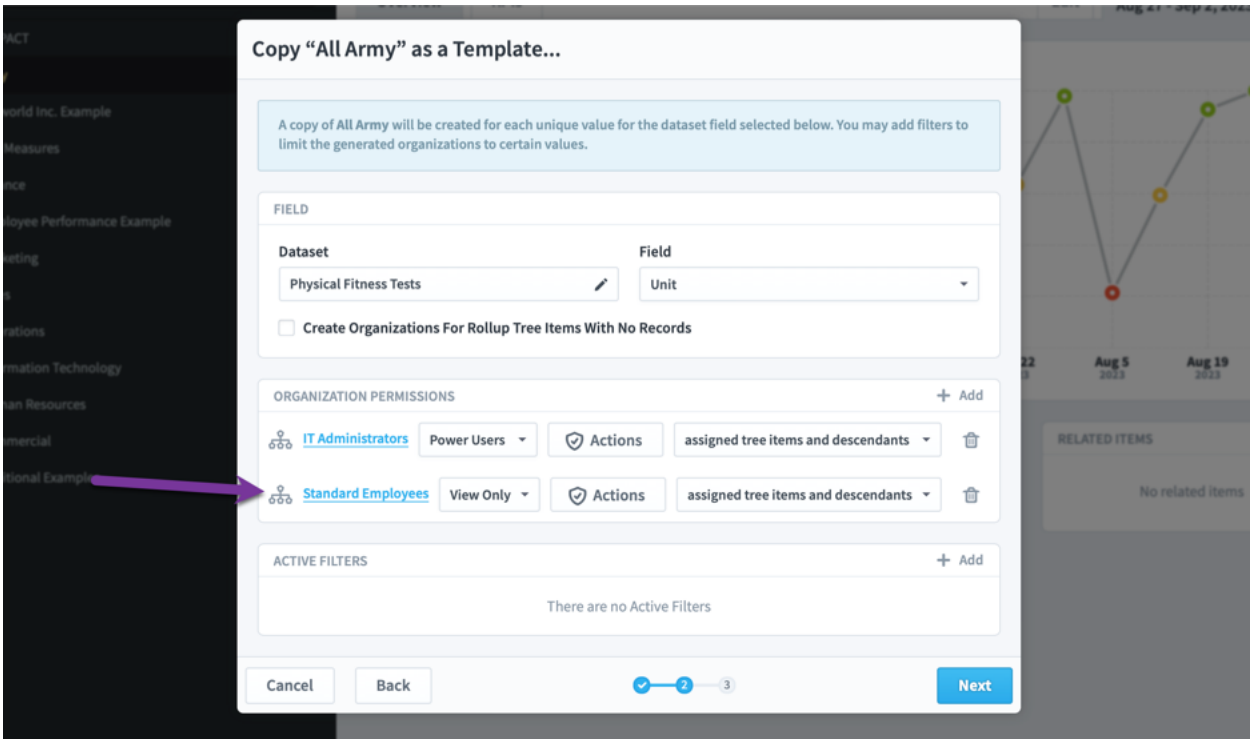
What happens next is deceptively simple, but incredibly powerful. By adding IT Administrators to the Organization Permissions, we have just given every IT Administrator access to view their organization and the organizations underneath it. It's assigning potentially thousands of permissions at once.



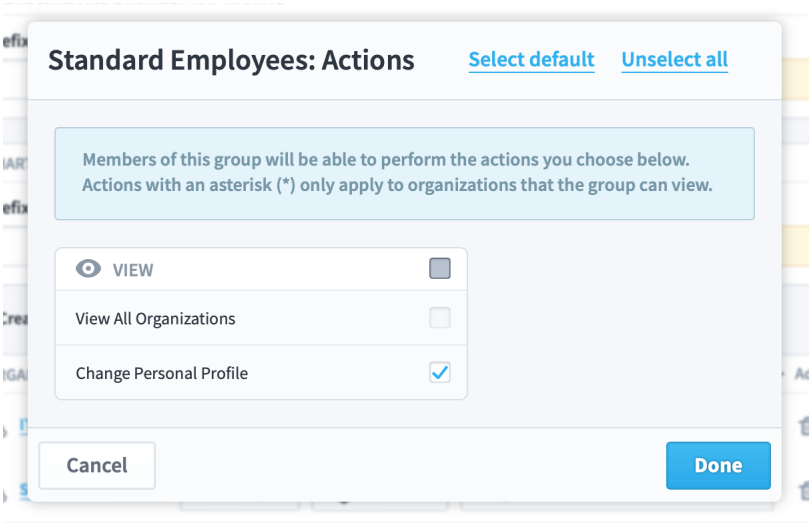
We also get to choose the actions our IT Administrators can do. We've chosen to make them Power Users, but we'll also click the Actions button to make sure they're getting the exact actions we want.



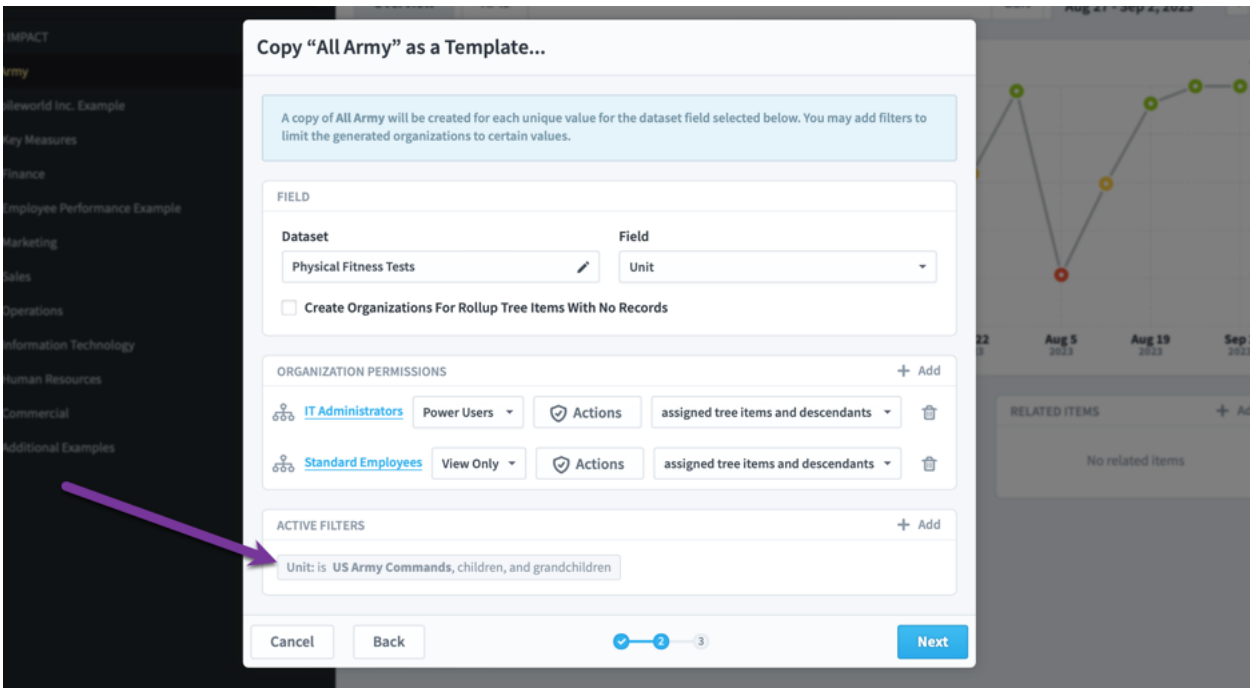
And, just as quickly, we'll give all of our Standard Employees permissions to their organizations, but for them it will be at a View Only level.



Just to be sure, we'll click on Actions to make sure our Standard Employees can do the correct things.



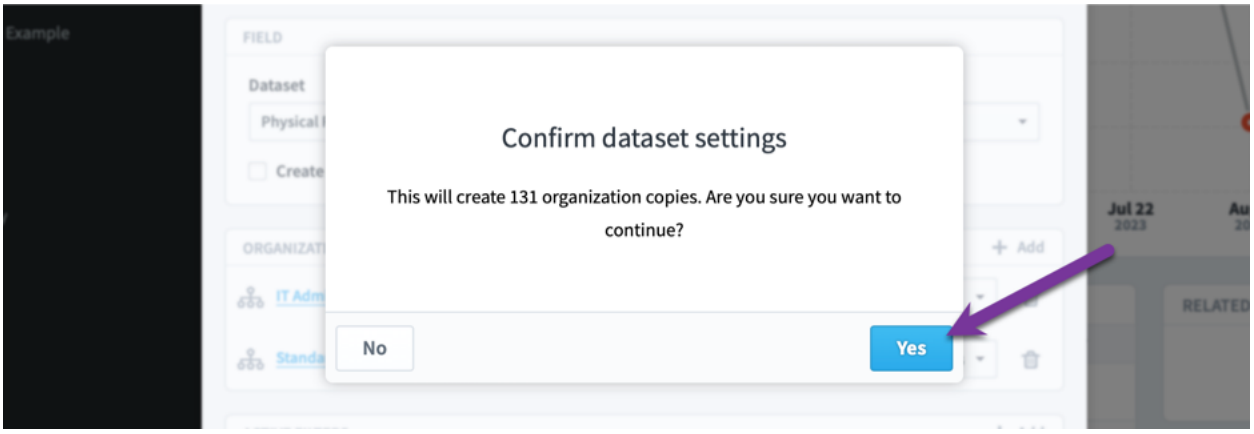
Finally, we'll add a filter so we don't create tens of thousands of organizations. Our rollup tree is the entire Army chain of command tree with 40,000+ units that goes 8+ levels deep. We'll instead only create high-level organizations by adding a filter for Army Commands, their children, and their grandchildren.



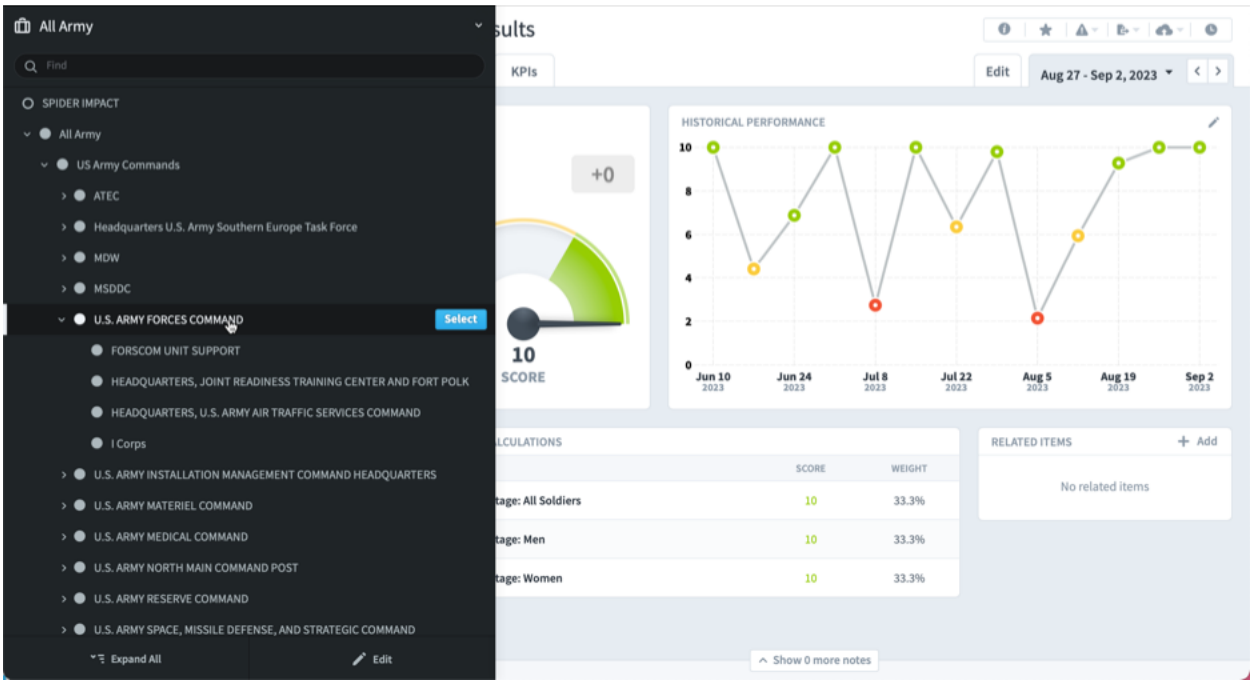
There's a nuance worth noting about filters that only applies to rollup trees. If the filter is for the same rollup tree field as the field you're using for the template, the filter only restricts the organizations you create. The descendant totals continue to be included for the KPIs. To put it another way, this filter is restricting the number of organizations created, but those organizations'

dataset KPIs still contain totals from records lower on the rollup tree that may not have organizations.

When we click Next, we're asked to confirm that we want to create 131 organizations.

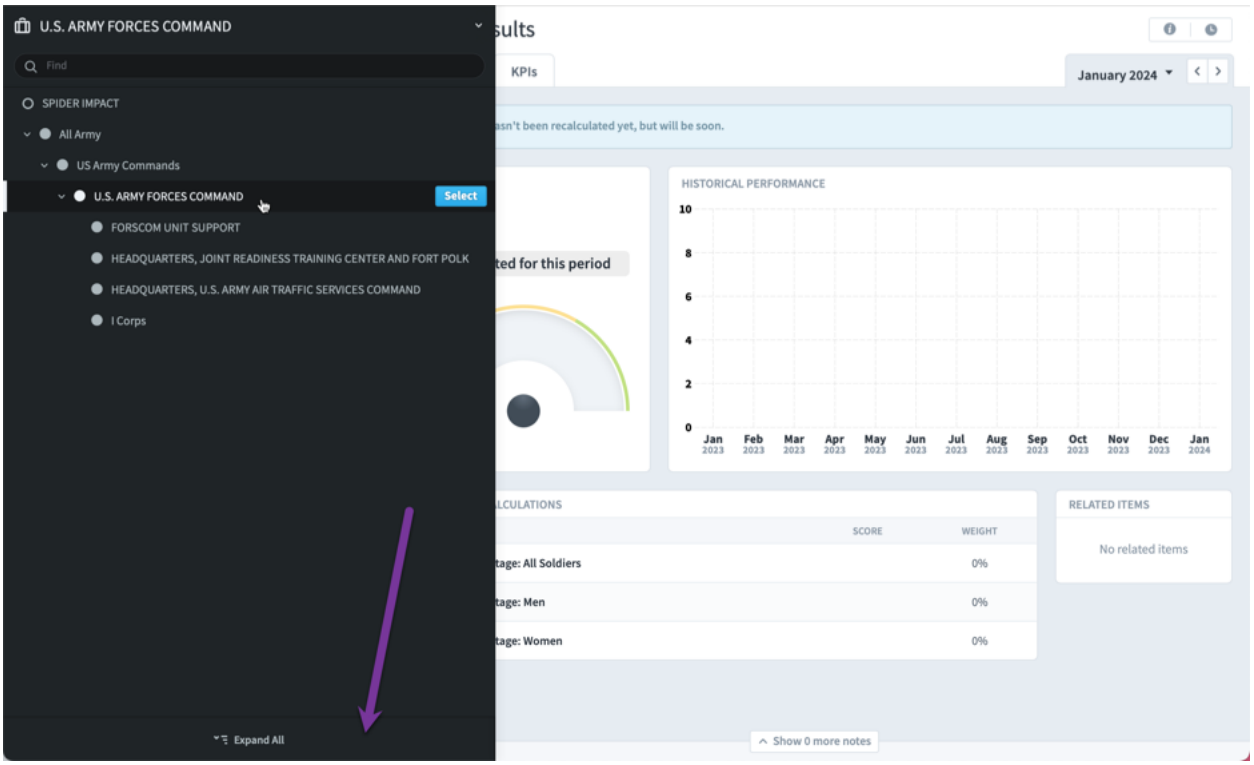


Once we've confirmed and finished, there are now 131 new organizations, each with templated scorecards, dashboards, and reports showing their data.



More importantly, however, is the fact that thousands of users can now see their appropriate organization, and they have permission to do the appropriate actions based on their position. For example, this is what the "standard

employee" Max Montgomery sees when he logs into the software. He can only see Forces Command and below, and there's no Edit button under the organization tree because he's just a standard employee.



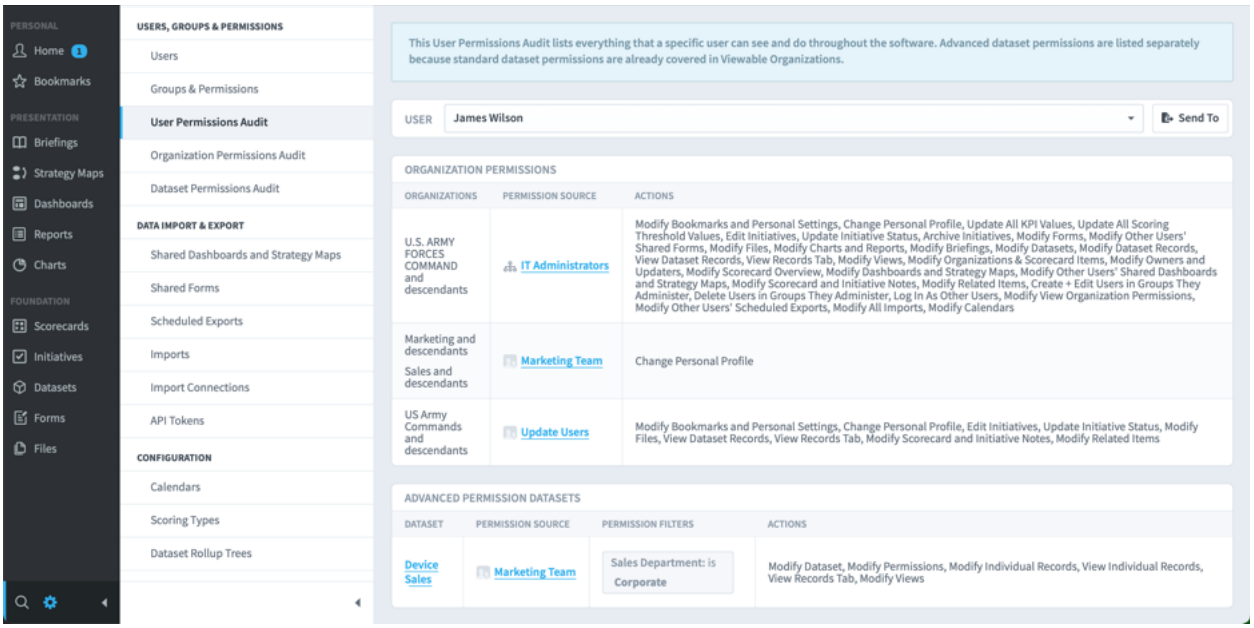
Permissions audits

In the past, administrators needed to go to multiple places in the software to get a holistic view of who can view a specific piece of data, as well as all the data a specific user can see. With the addition of organization permissions for rollup tree groups as described above, this list of ways a user can get access to data has gotten longer.

To address the growing need for centralized permissions auditing, this enhancement adds a collection of new permissions audit reports. Combined, they significantly add to the data governance capabilities of Spider Impact.

User permissions audit

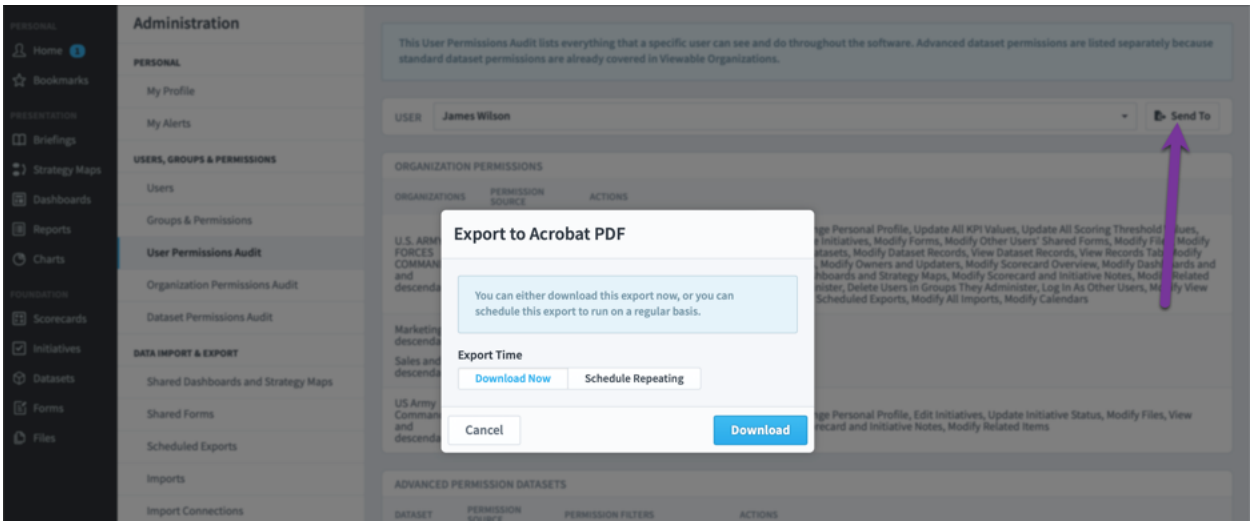
The User Permissions Audit allows you to choose a user, and the report shows everything in the software they can view, as well as the actions they can do to the data while they're viewing it.



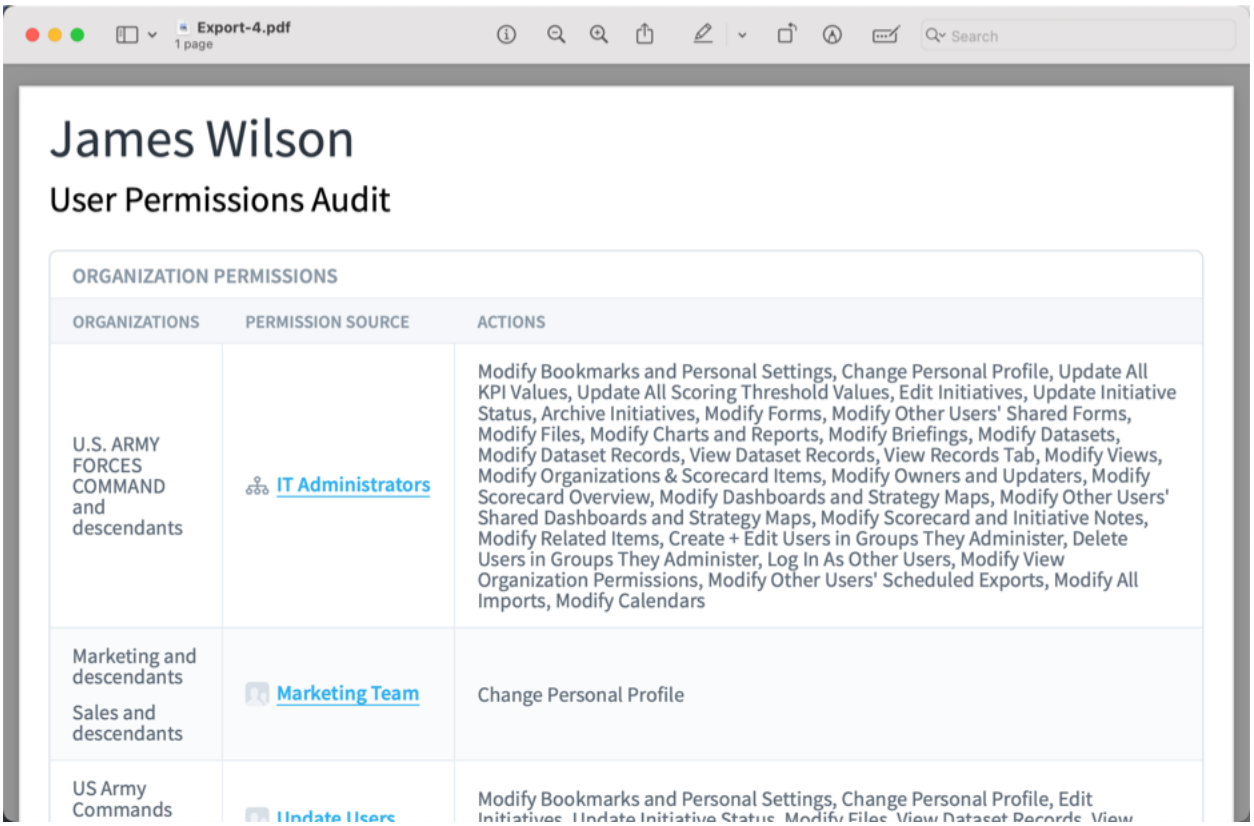
This report is broken into two tables. First is the organization permissions table, showing every organization they can view, how they are able to view it (the permission source), and what actions they can do in that organization. In the example above you can see organization permissions assigned through both groups and rollup tree groups. Clicking on a rollup tree group will show a dialog with every member of that rollup tree group and what rollup item they're assigned to.

The second table lists the datasets with advanced permissions that they can view, how they are able to view them (the permission source), what records they can see, and what actions they can perform. Note that this only lists advanced permissions datasets because standard permissions datasets are covered in the organization permissions table.

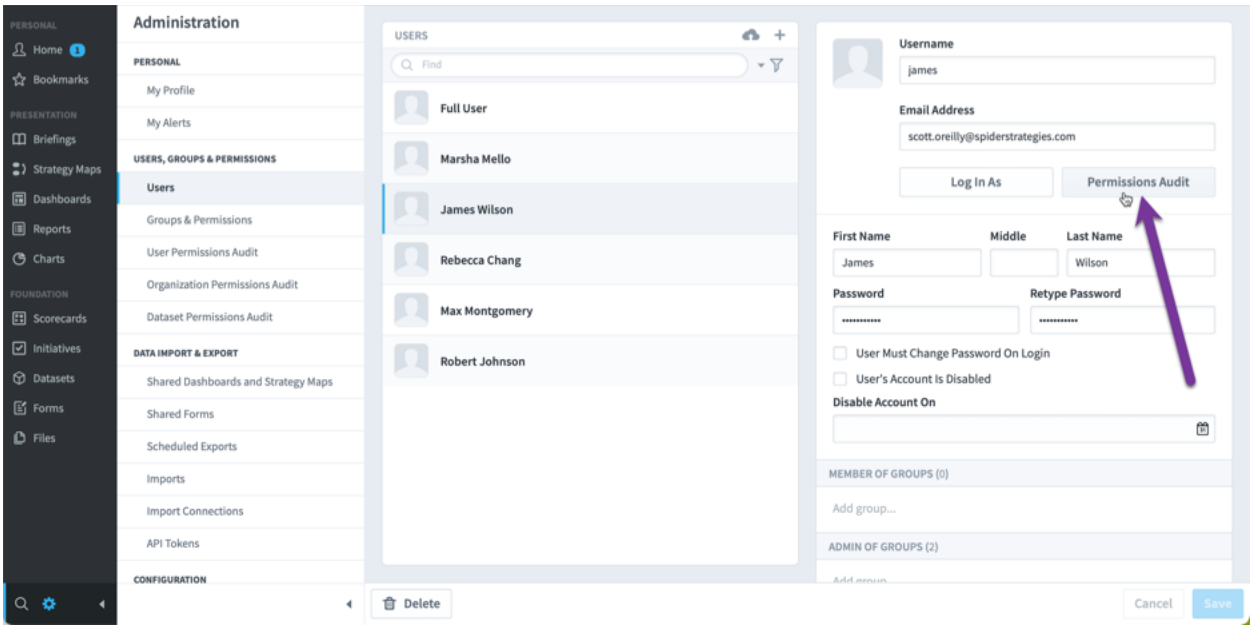
This report has a "Send To" link, allowing you to either download a PDF export of the user permissions audit, or schedule an export to be emailed on a regular basis.



Scheduled exports like this allow administrators to be proactive about data governance, regularly reviewing permissions for incorrect assignments.

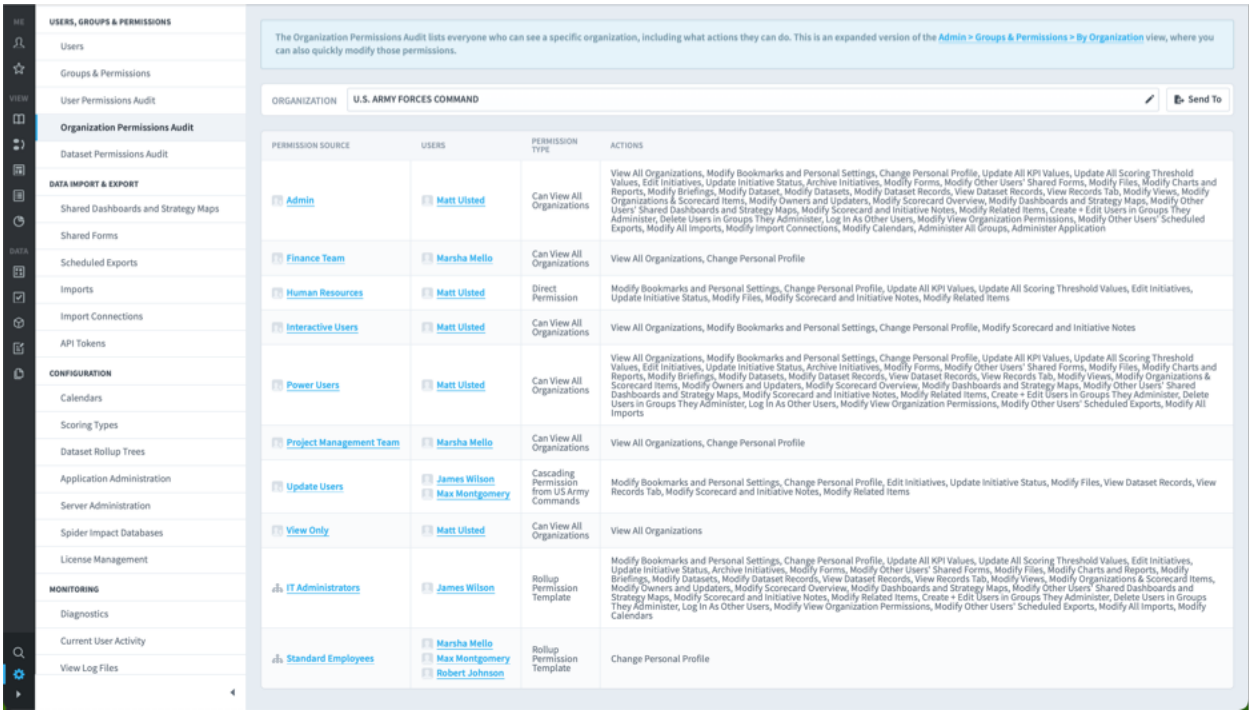


There are now also links to the User Permissions Audit report throughout the software. For example, you can run this report when editing a user.



Organization permissions audit

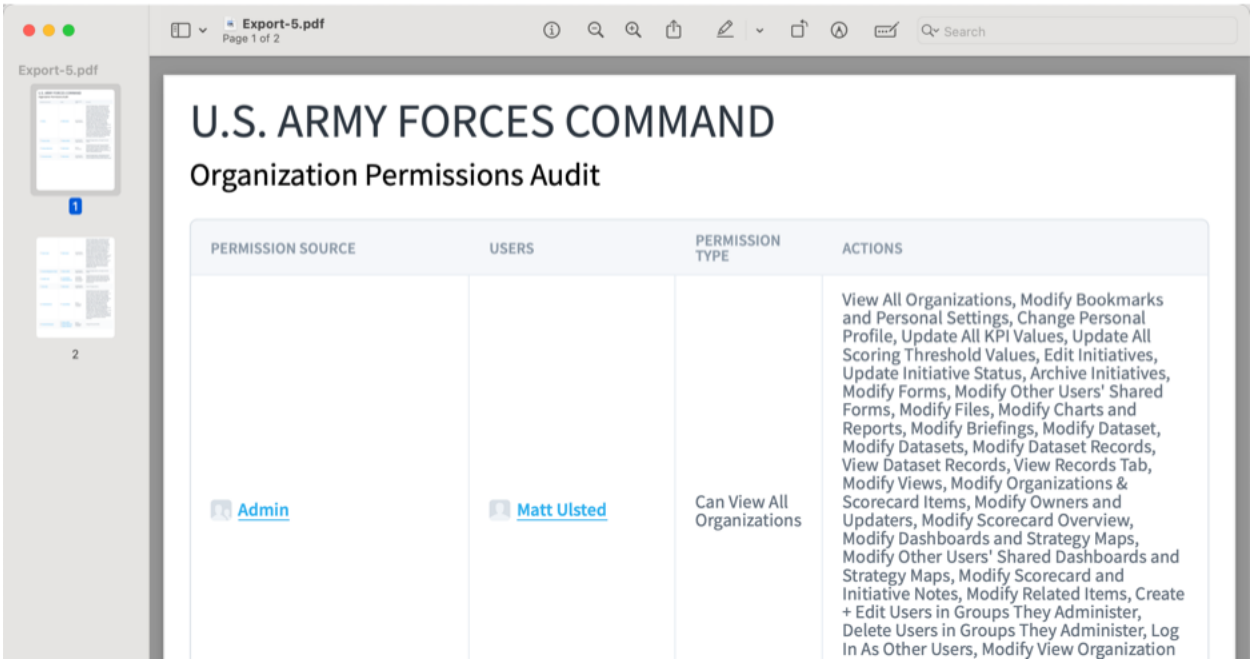
The Organization Permissions Audit allows you to choose an organization, and the report shows every user in the software who can view it, as well as the actions they can do to the data while they're viewing it.



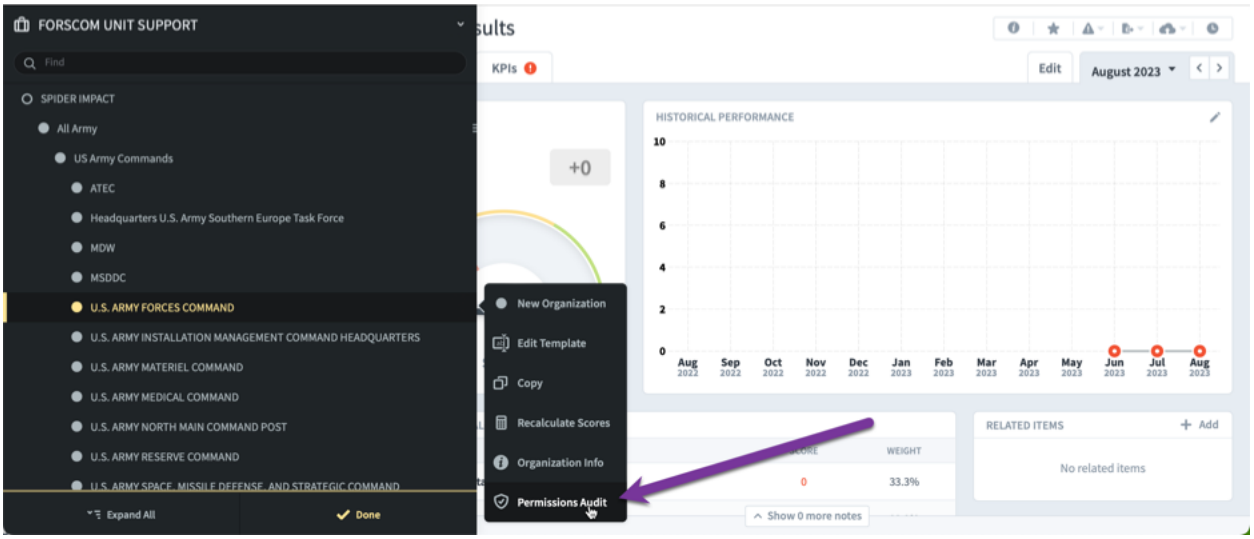
In this example we can see permissions being assigned via both groups and rollup tree groups. We can also see the permission type, showing whether they

can see all organizations, that specific organization, or a higher-level organization with permission to see descendants.

Like all the permission audit reports, you can export this report to PDF.

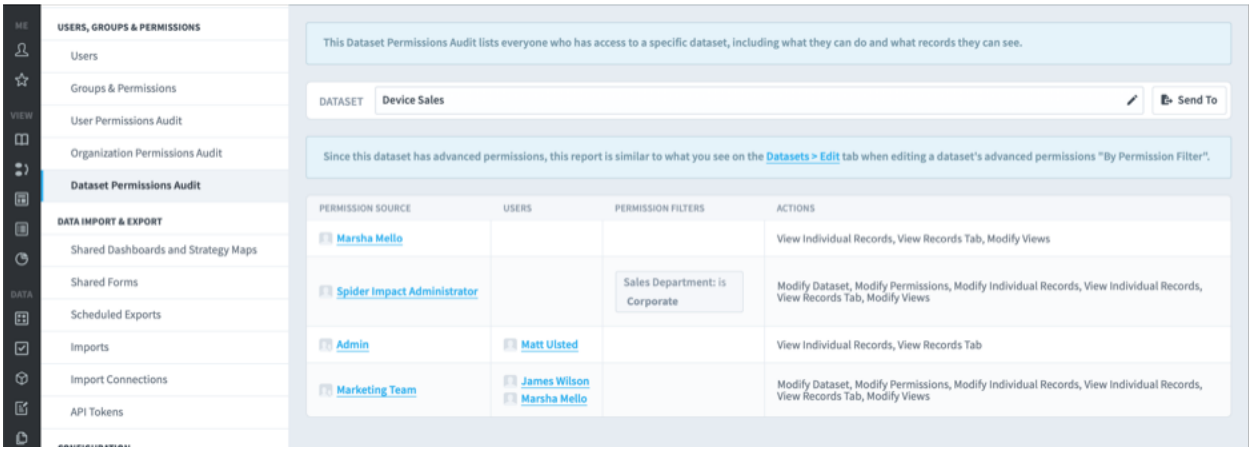


And you can use this report either directly in the administration section, or via links throughout the app.

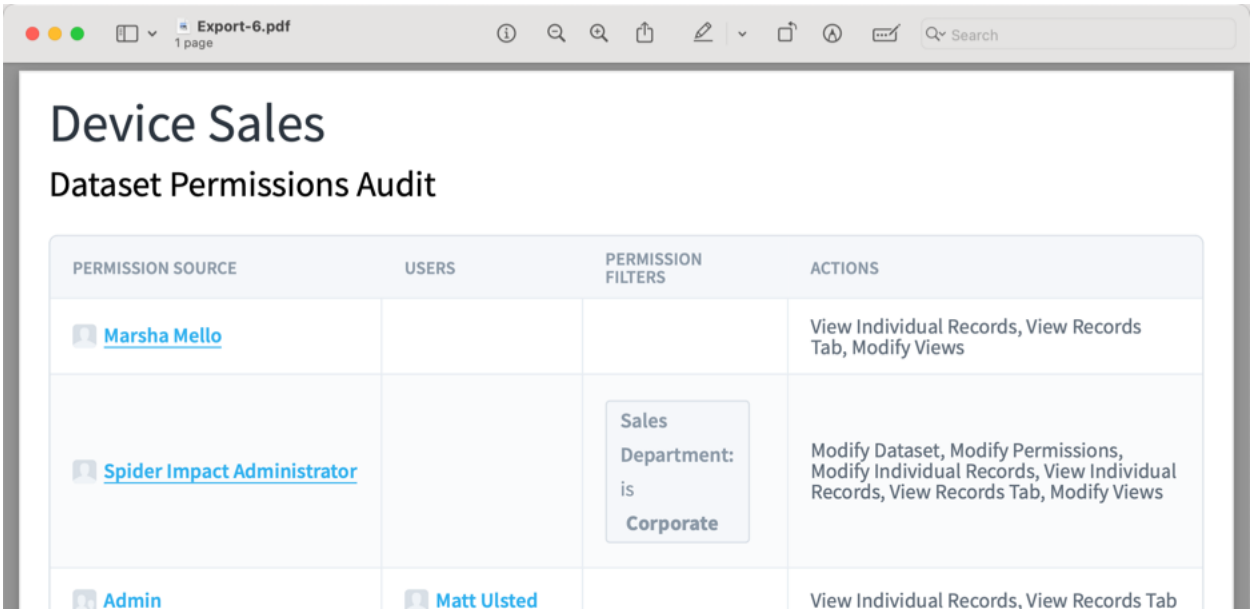


Dataset permissions audit

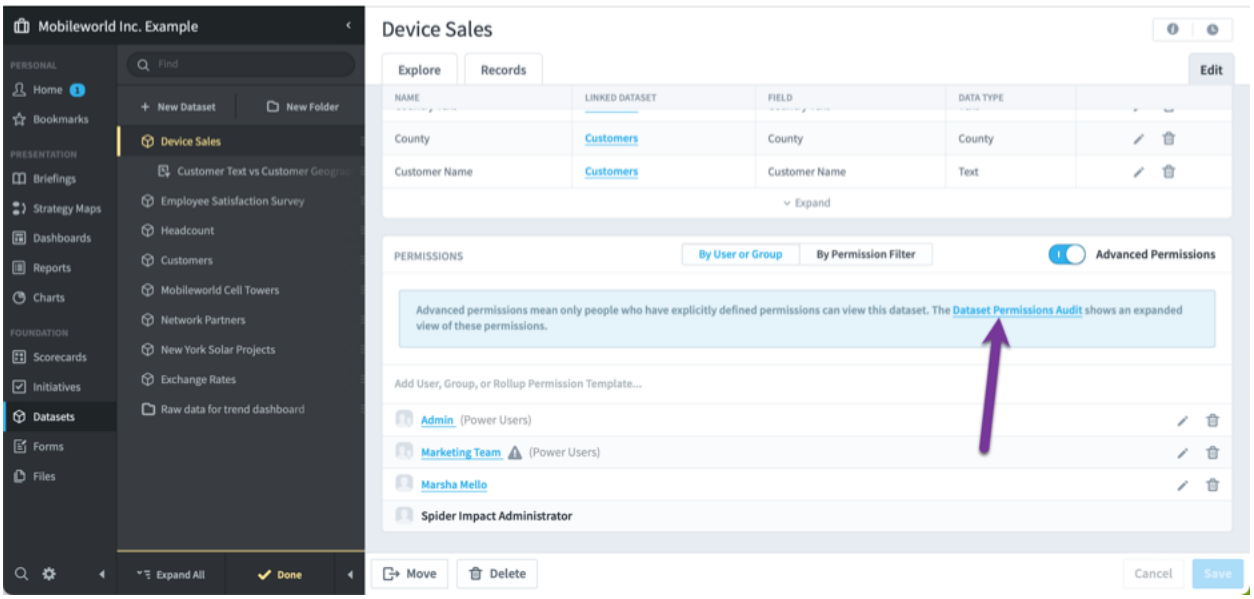
The final permission audit report is the Dataset Permission Audit. Here we've selected a dataset, and we can see all of the users who can view that dataset, which records they can see, and what actions they can perform.



You can export this report to PDF.



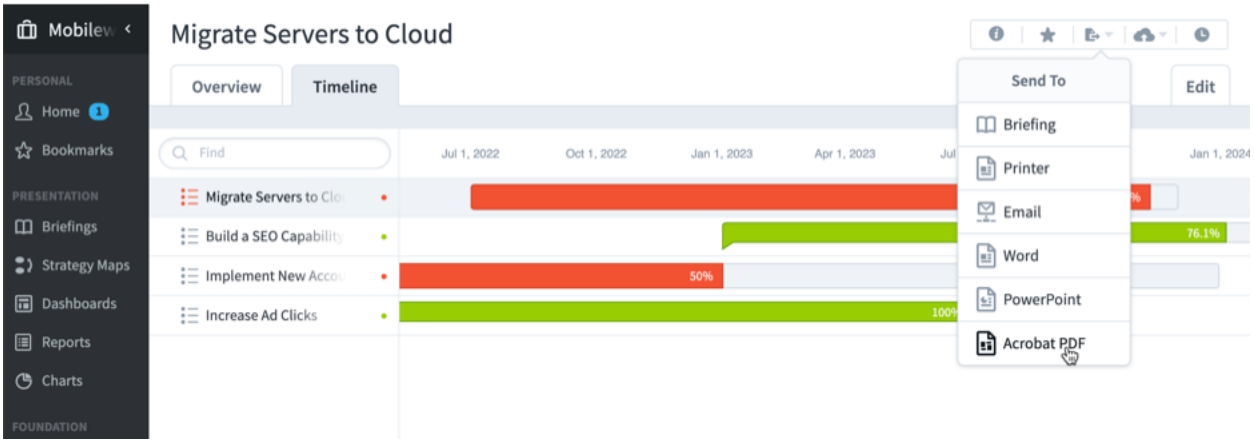
And you can access this report either in the administration section, or via links throughout the app.



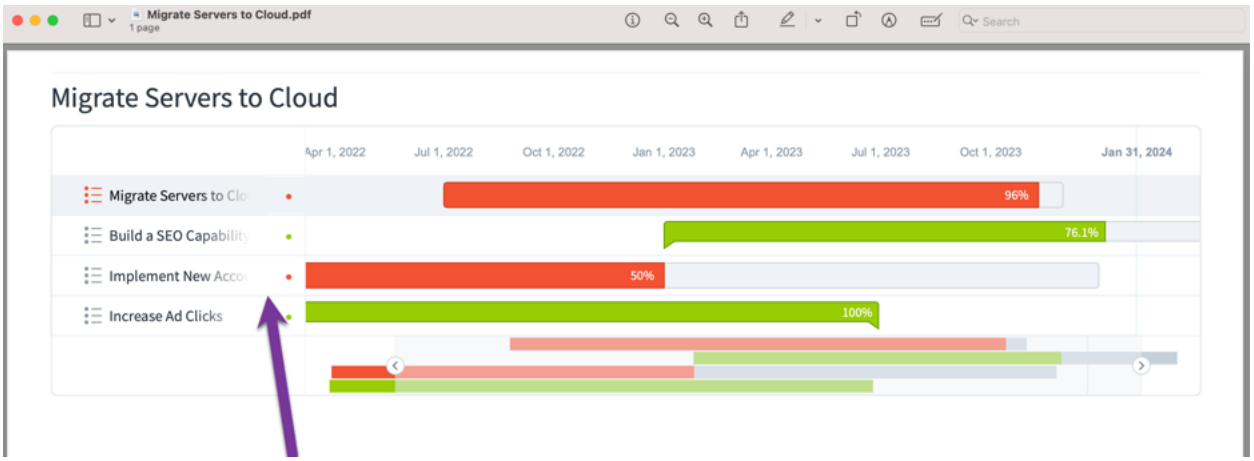
Import and Export

Initiative Timeline size retained on export

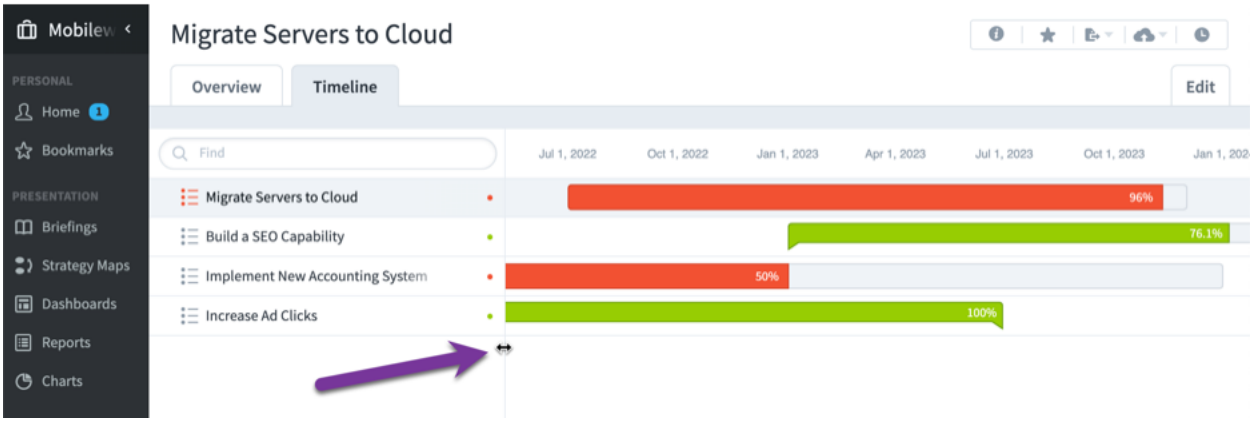
Like most screens in Spider Impact, the Initiatives Timeline tab can be exported in various formats.



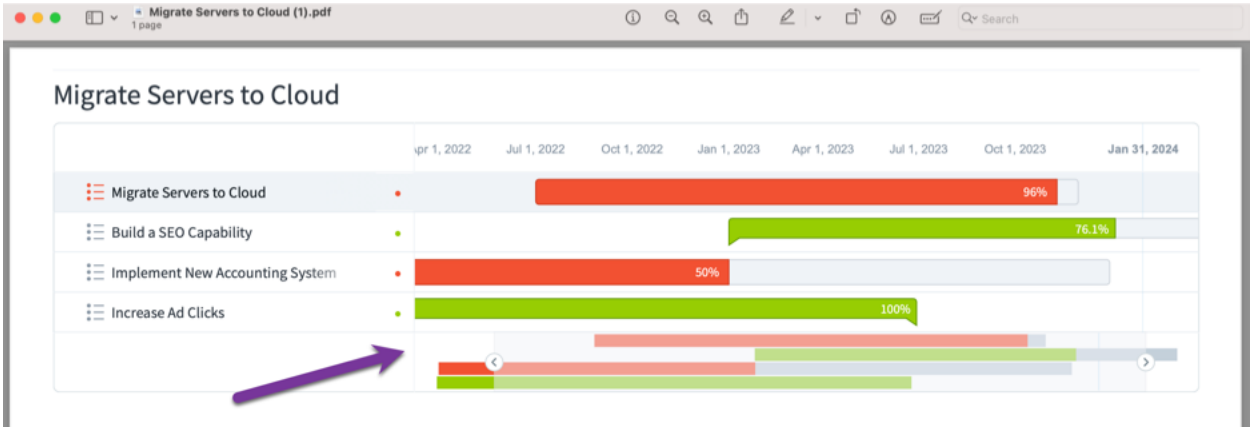
Here is a PDF export, but as you can see, some of the initiative names are cut off.



As with all navigation panes in the app, you can manually adjust the width of the Timeline's navigation pane.



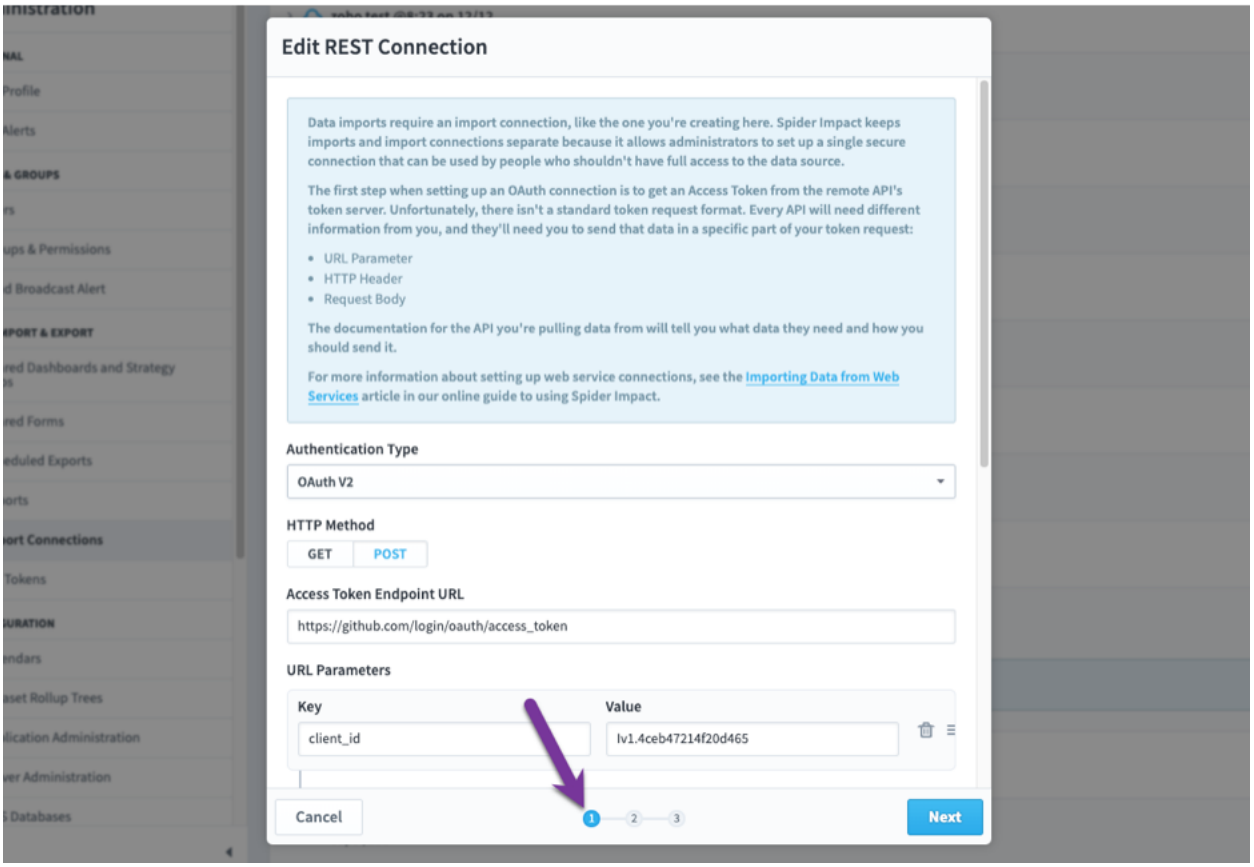
In the latest version of Spider Impact, this manually set width is now used in the Timeline exports.



REST OAuth imports with refresh tokens

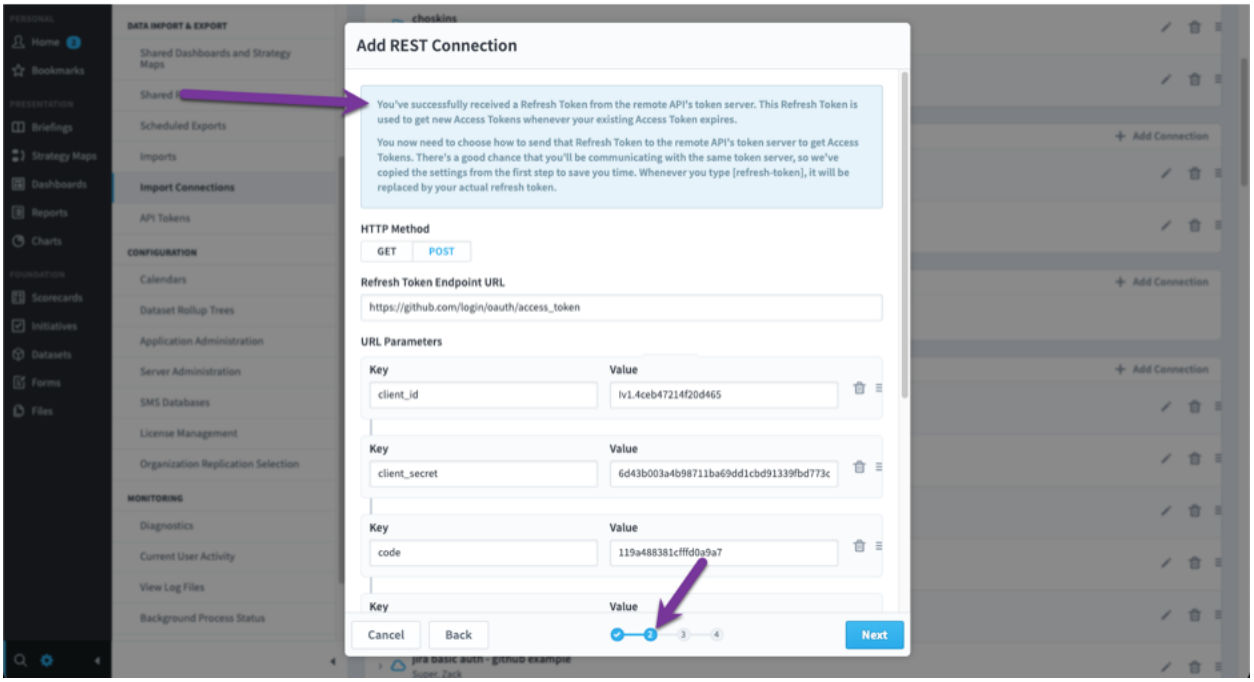
When setting up a REST OAuth import connection, the remote server gives Spider Impact an Access Token to use in future communication. For many APIs, this Access Token never expires. Some APIs, however, use access tokens that expire as often as every hour, and they require refresh tokens to regularly get new Access Tokens. Spider Impact now supports communication with remote APIs that use Refresh Tokens to retrieve these expired Access Tokens.

Let's explore refresh tokens in action. The flow for all OAuth communication starts the same. Here we're on step 1 of 3 for setting up an OAuth import connection, and we're sending our credentials to the remote API's token server.

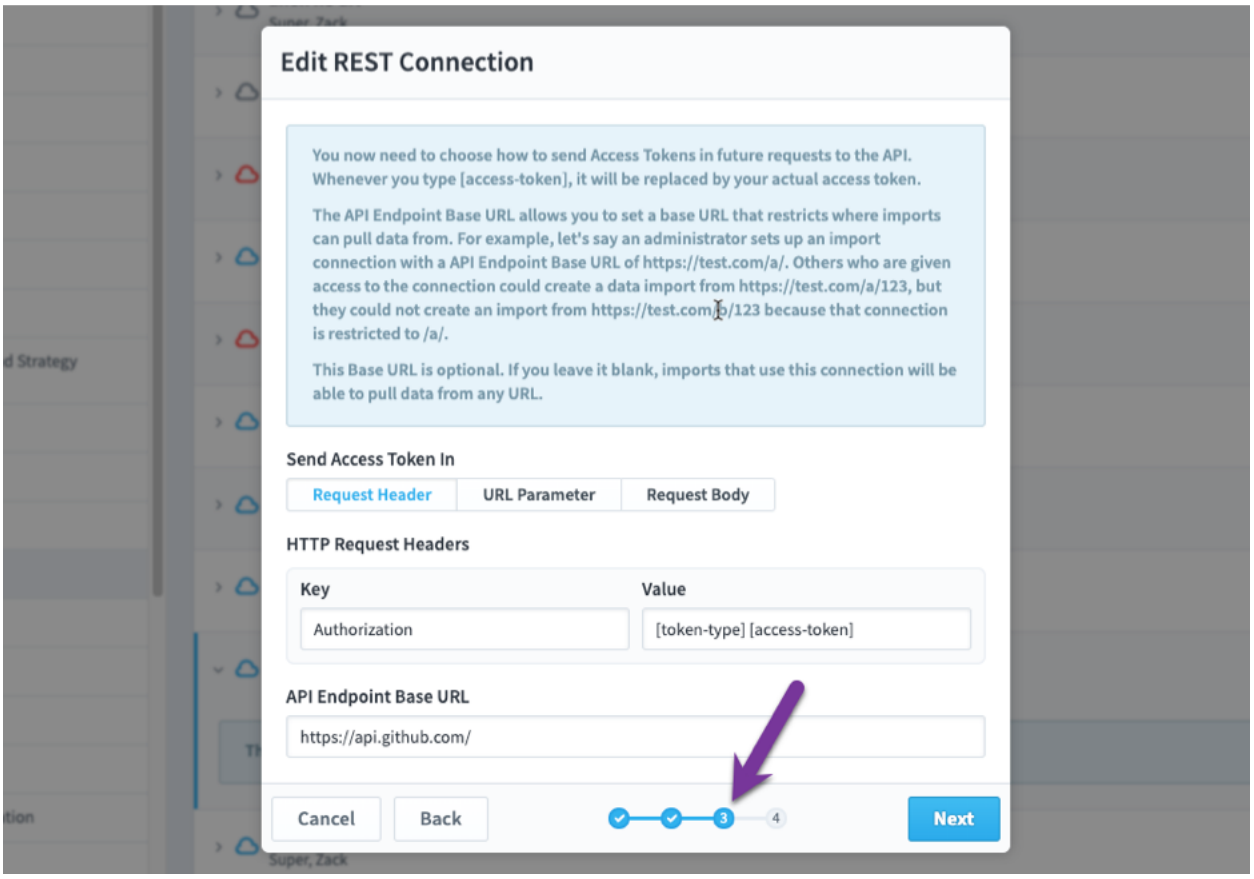


If the remote API's token server responds with an Access Token, we'll continue to the next step as before. If the server responds with a Refresh Token, however, we continue to a new step that is added to the wizard, bringing the total number of steps to 4. Here we can see that we've received a Refresh Token, and that we need to tell Spider Impact how to send that refresh token to

the token server. This will often be in the same way as the original request, so those settings are automatically copied over from step 1.



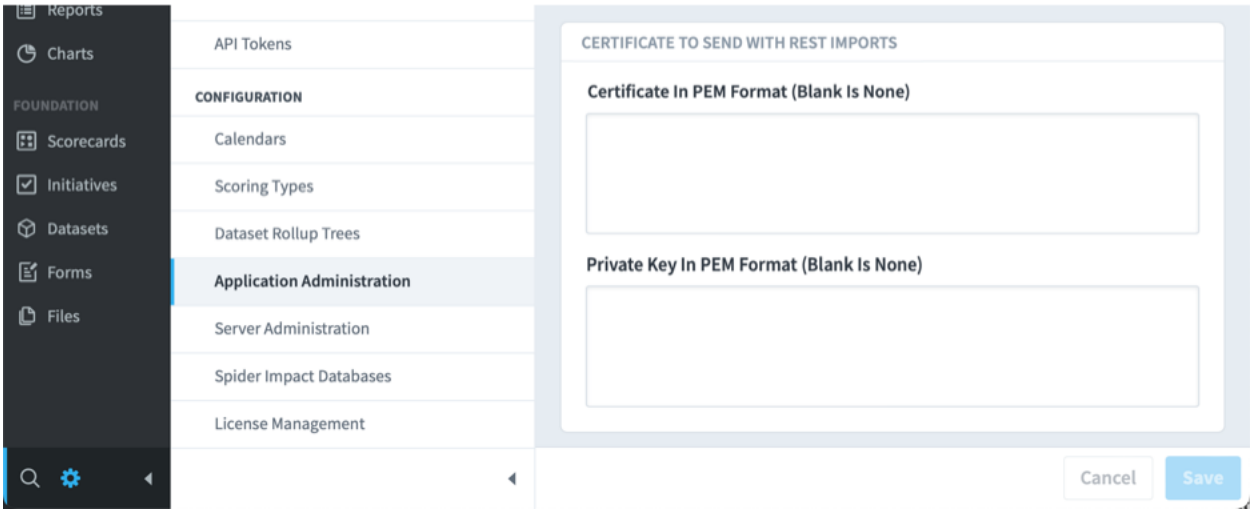
If everything is successful, the remote API token server will respond with an Access Token, and we need to tell Spider Impact how to send that token to the API in the future. This is the same as step 2 when refresh tokens aren't involved.



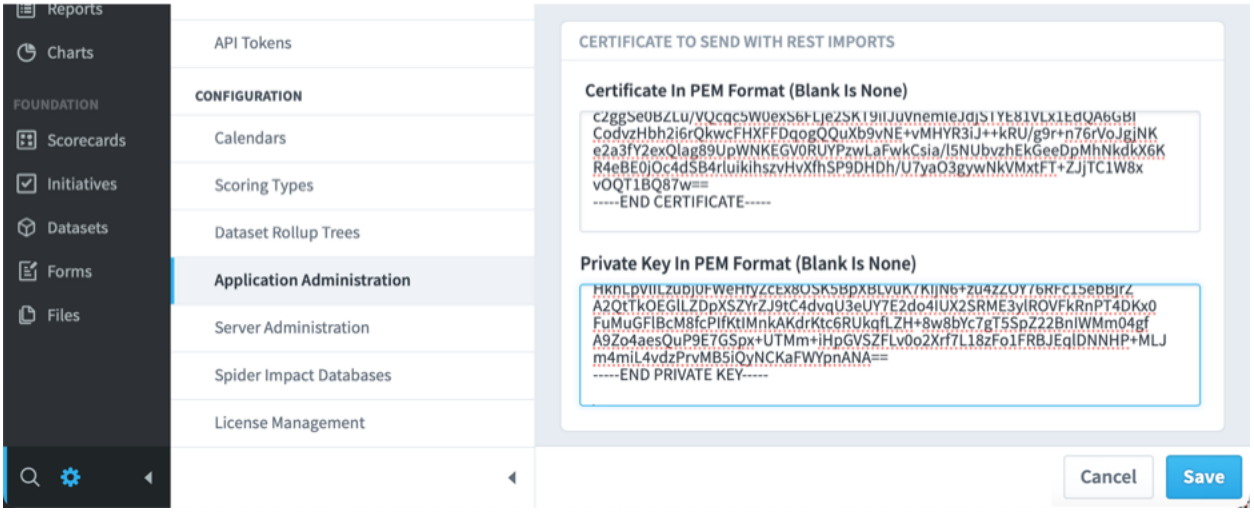
REST OAuth imports with certificate authentication

Some REST APIs require you to send a certificate to prove who you are. Spider Impact now supports sending these certificates with API requests.

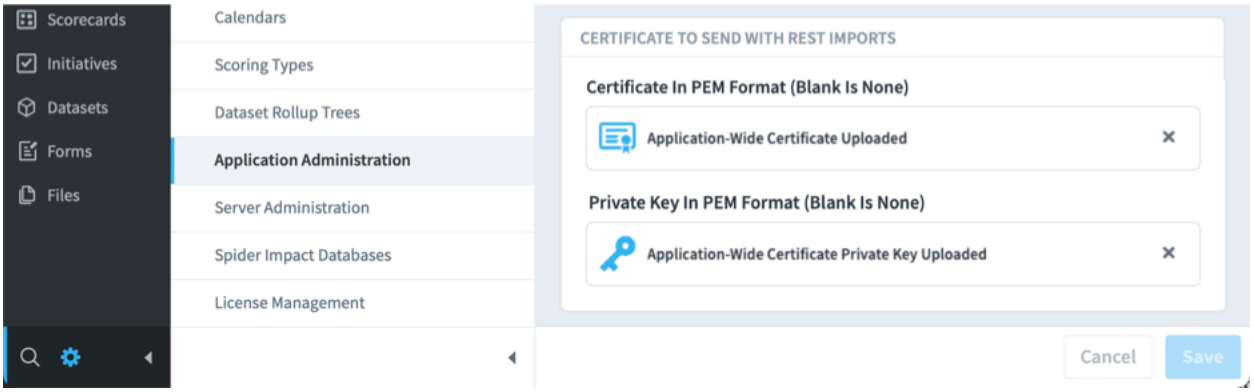
To set up your certificate, there is a new "Certificate to Send With REST Imports" panel in Application administration.



Just paste in your certificate and private key (both in PEM format) and click Save.



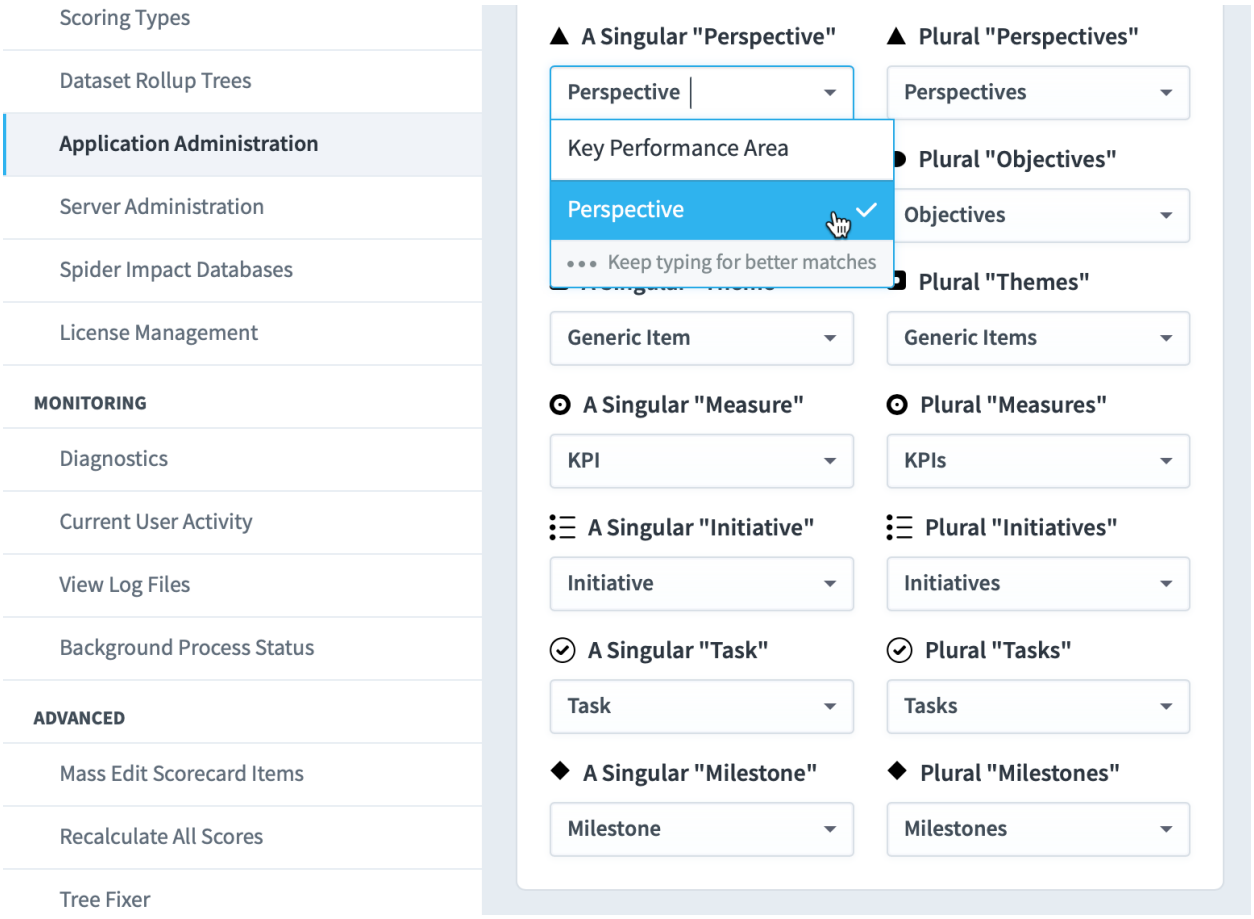
Spider Impact will automatically send this certificate and private key to all REST APIs that request it.



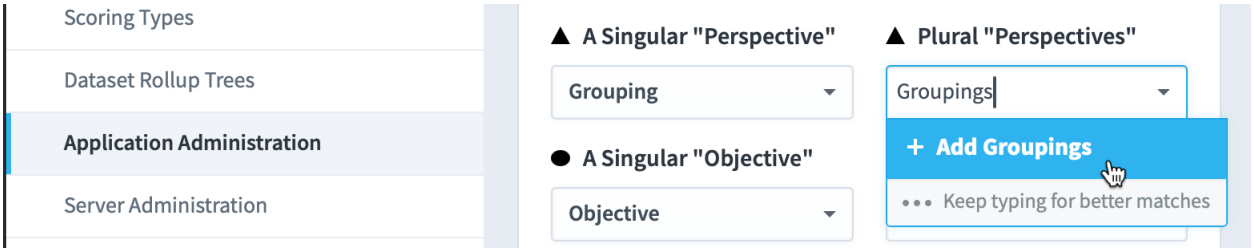
Administration

Configuring initiative and scorecard item names

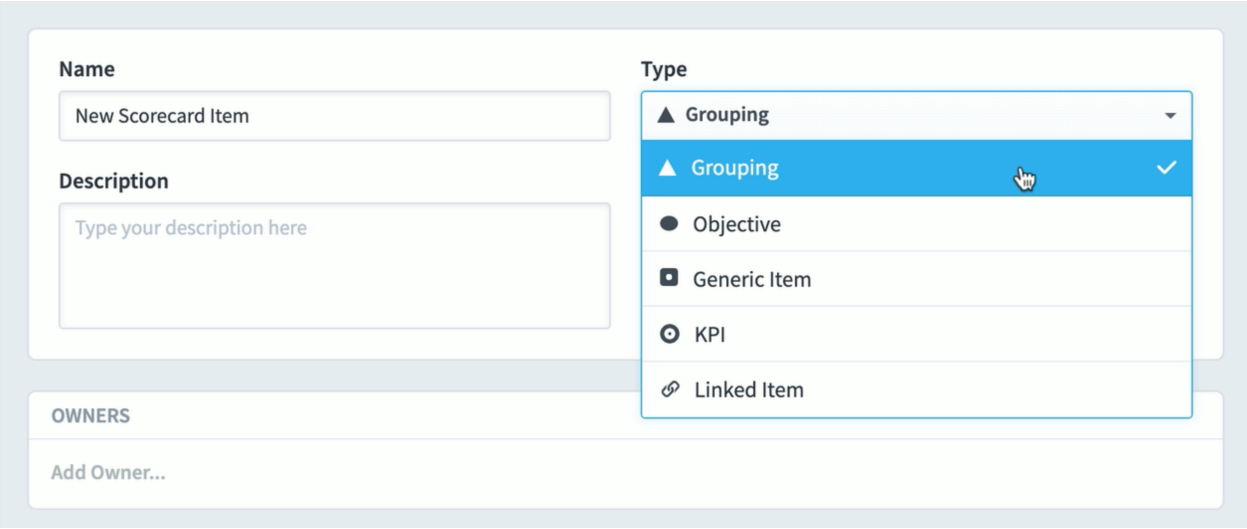
Many organizations have names for their performance items that differ from the standard Spider Impact defaults. You can now configure these scorecard and initiative item names in Application administration. You can choose from popular pre-defined names like “Key Performance Area” and “Perspective”.



Or you can type whatever language you want. In this example we're using the term "Grouping".

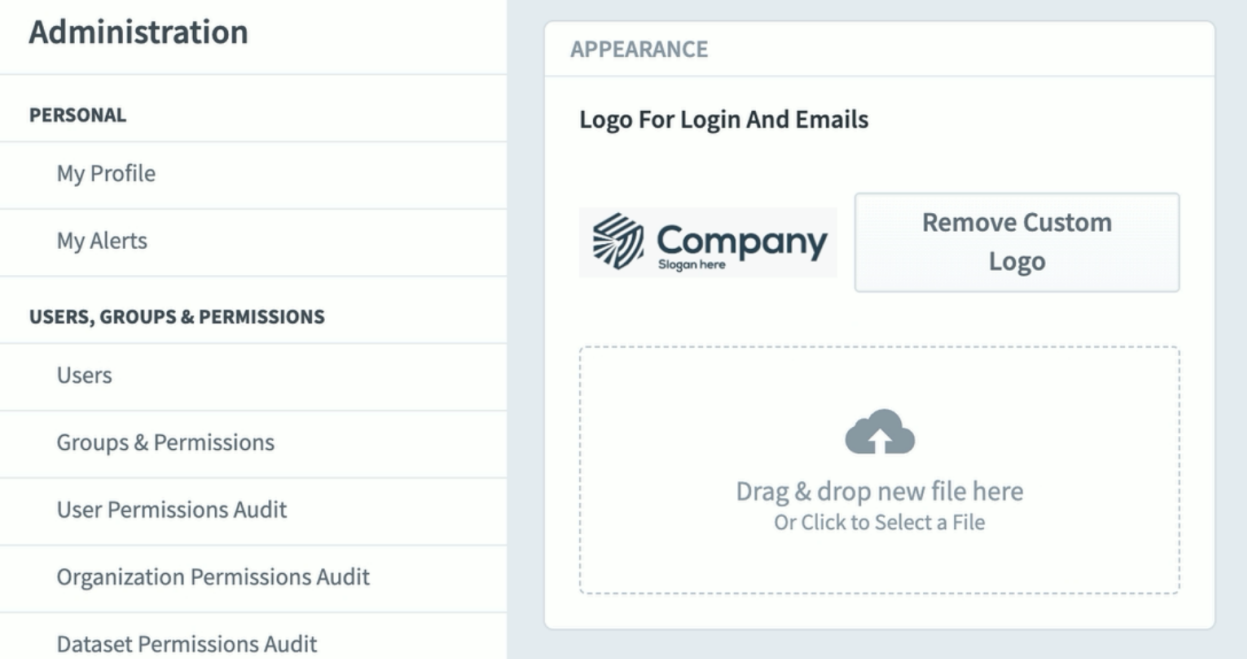


Now when we create a scorecard item, it calls the object a Grouping.

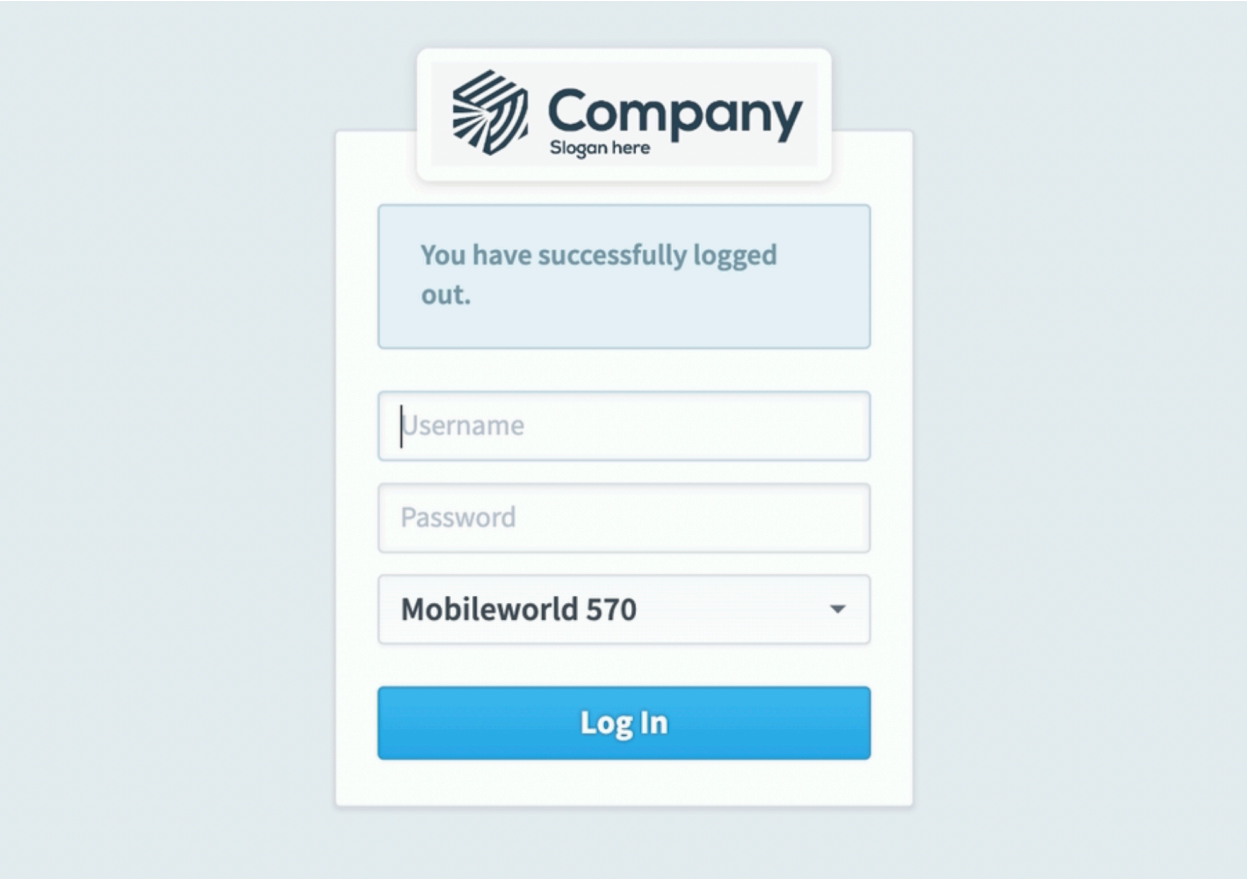


Custom logo

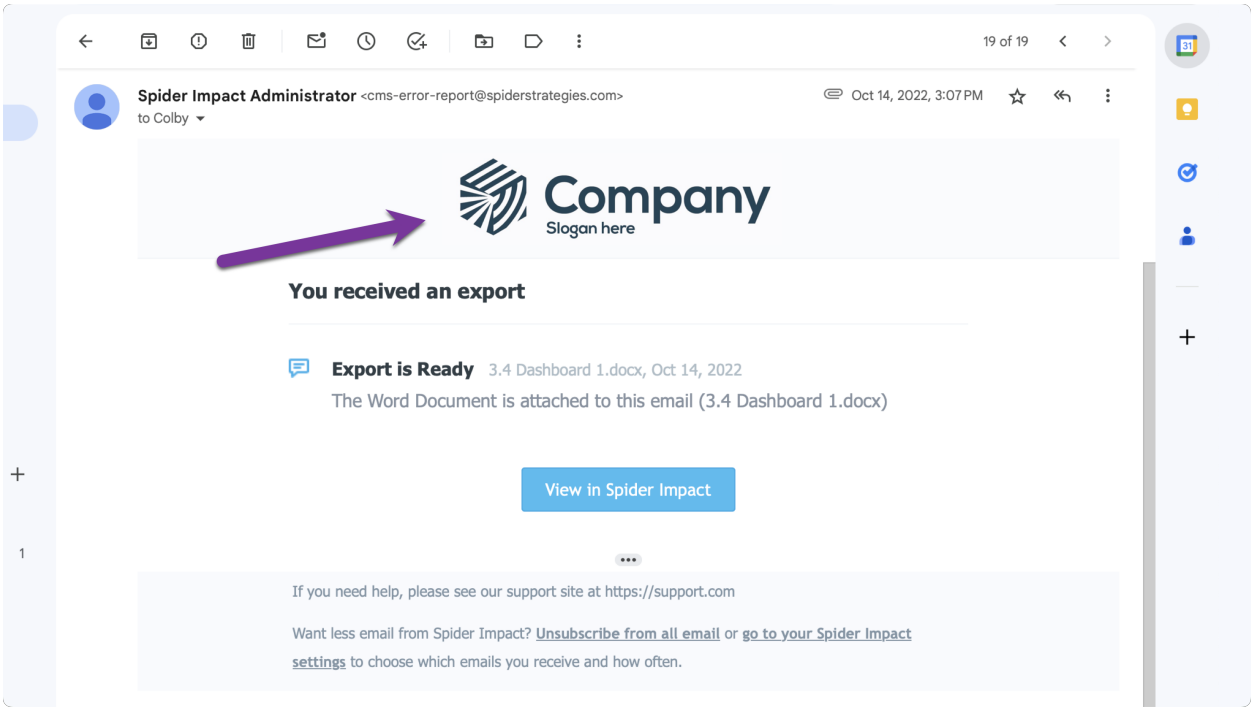
You can upload a logo in Application Administration.



This logo will be shown on the login screen.

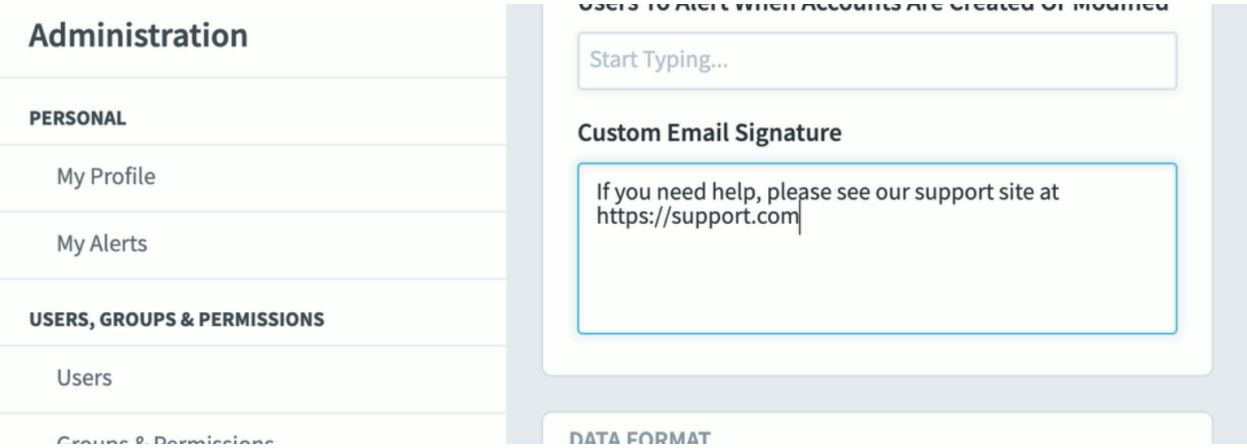


It's also used in emails sent out by the software.

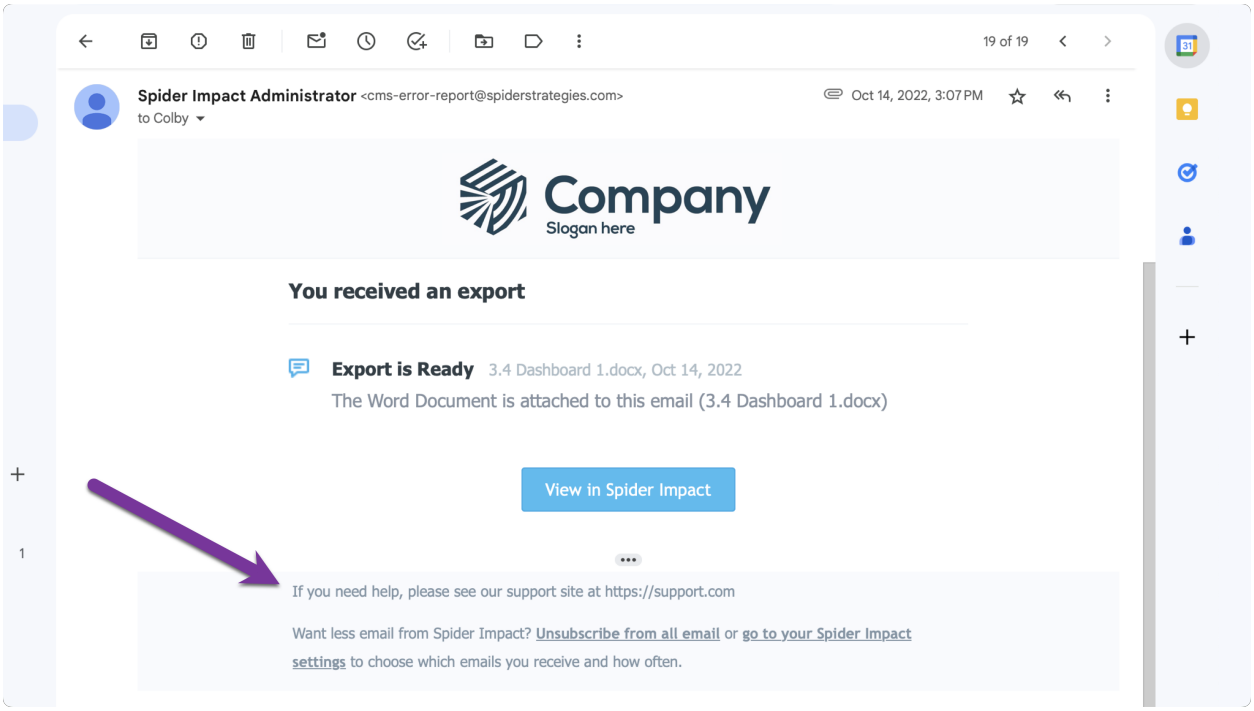


Custom email signature

You can set a custom email signature in Application Administration.



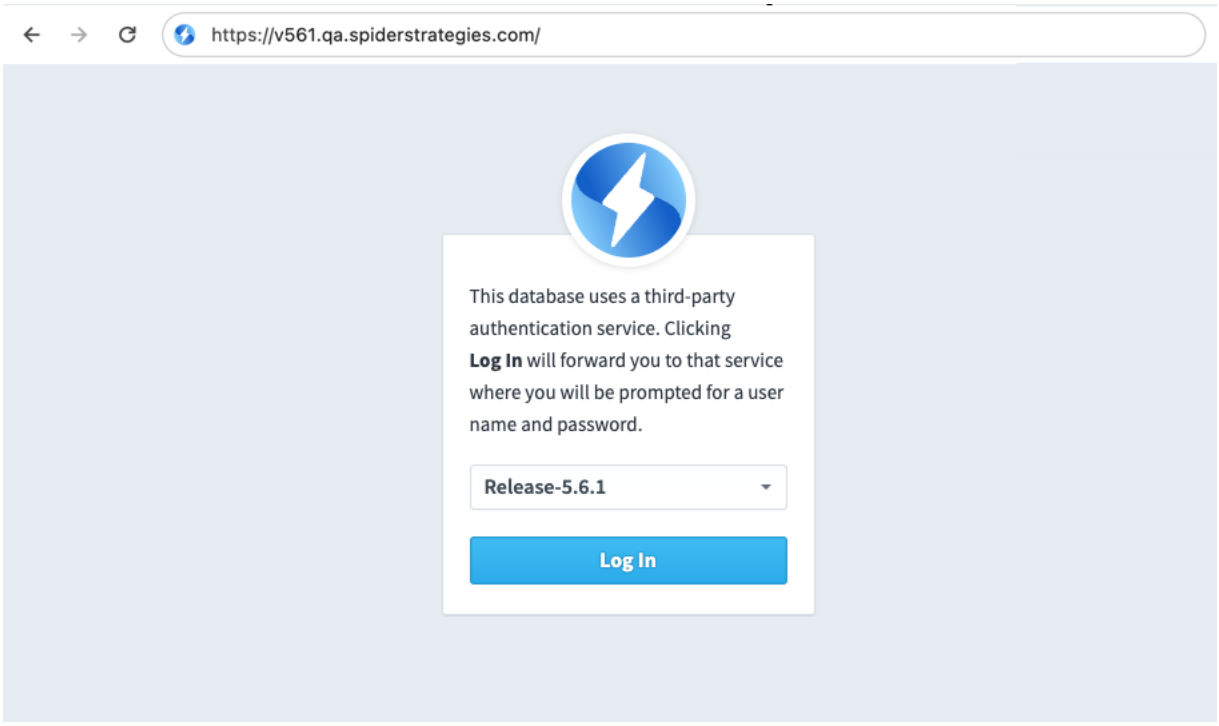
This text will be included in the emails sent from the software.



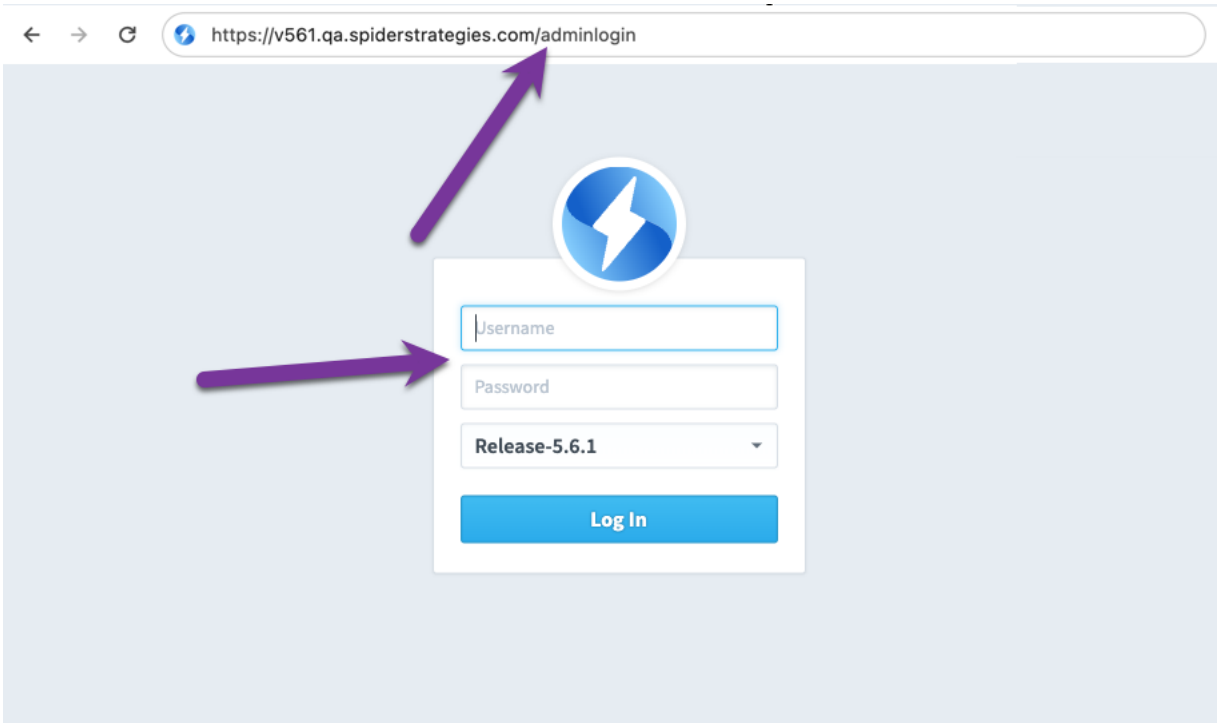
Forcing user/password login with single sign-on

When single sign-on is enabled, there are times when an administrator needs to log into Spider Impact with a username and password. This is useful, for example, when configuring single sign-on itself, or when a central SAML server is down.

This is the standard single sign-on login screen.

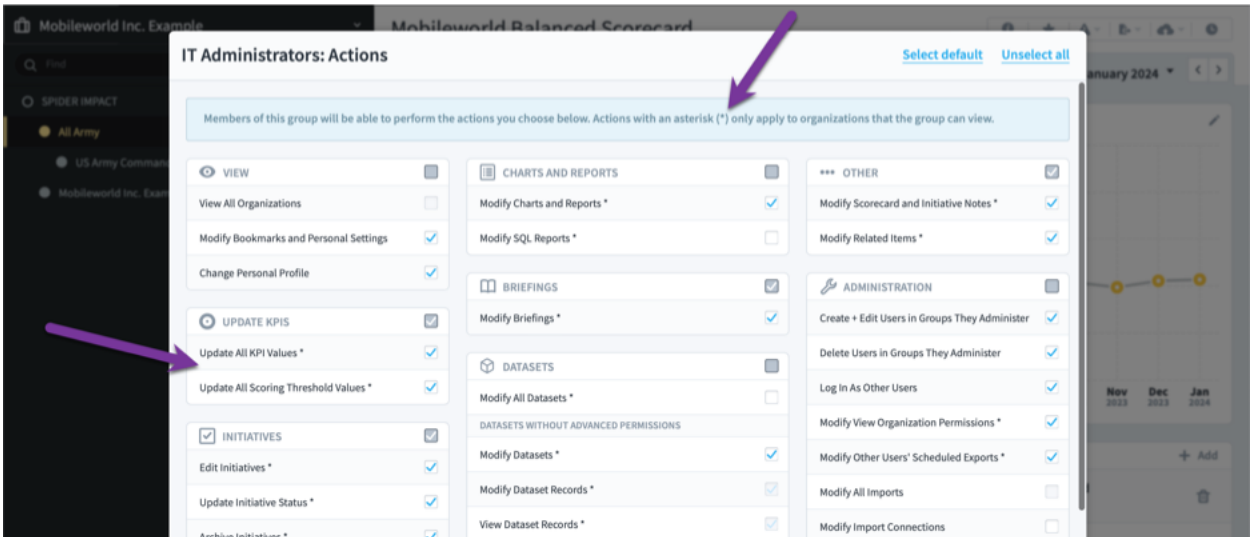


This is what it looks like when you change the URL to `/adminlogin`. You can now log in as any user that has been given Application Administration permissions.

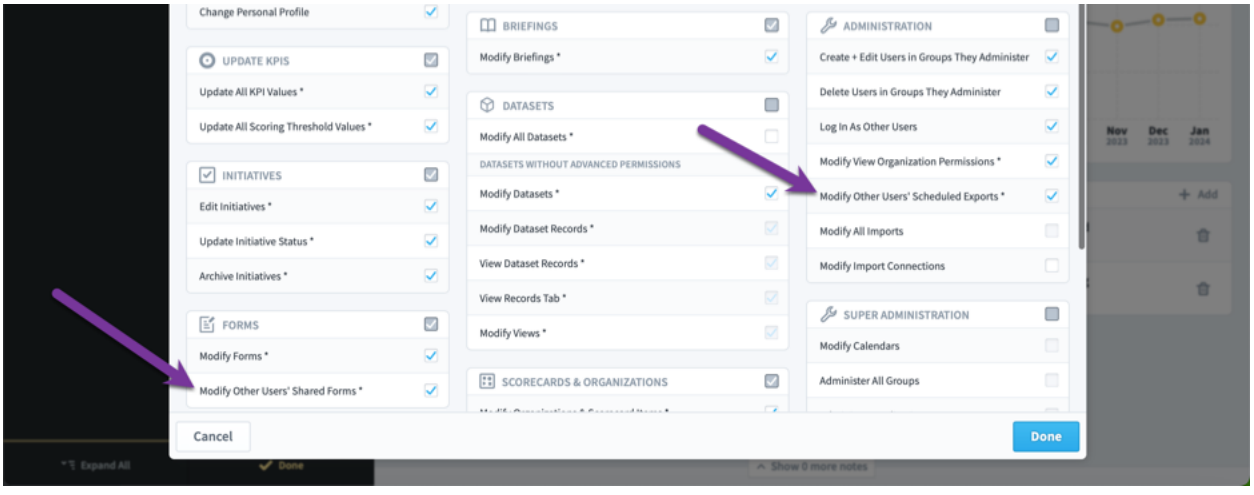


Action naming clearer in permissions

Some permission actions apply to only organizations that group members can see, and some actions apply outside of organizations. There is now an asterisk next to every assignable action that only applies to the organizations that the group can view. At the same time, we have simplified actions like “Update All Viewable KPI Values” to be just “Update All KPI Values” with an asterisk.



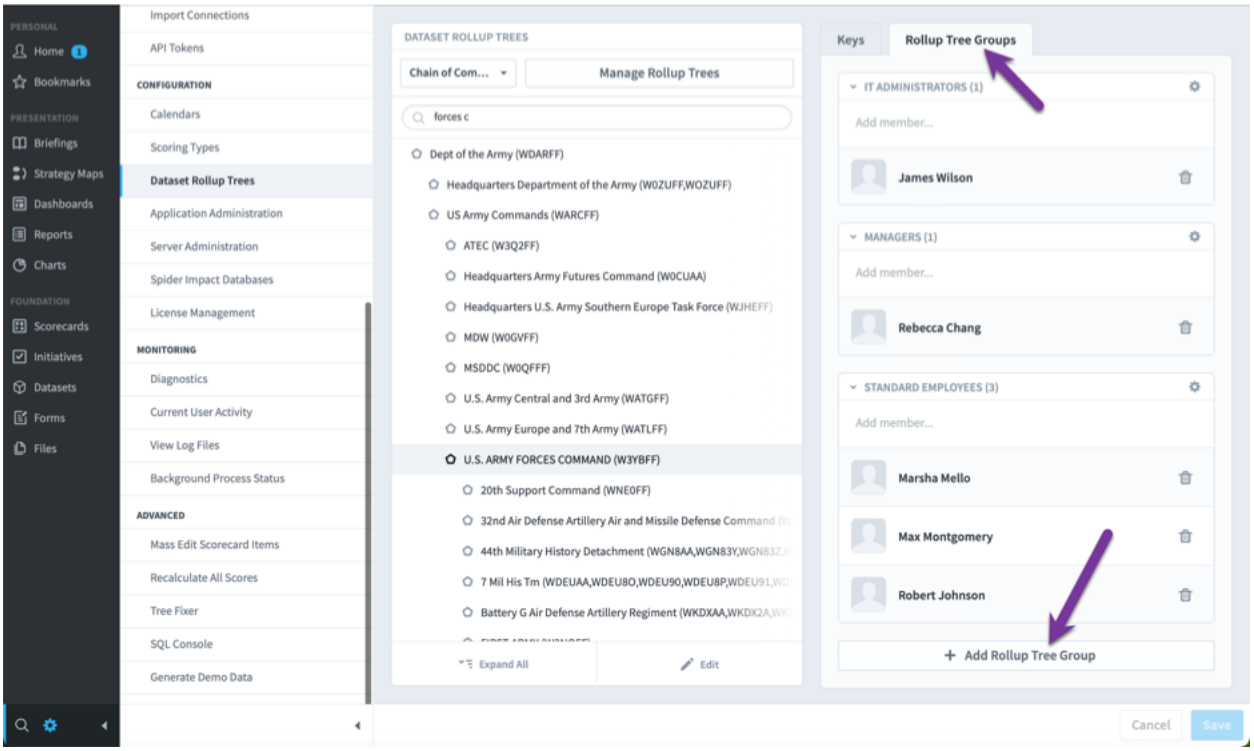
Several actions have also been renamed for clarity. For example, “Modify All Scheduled Exports” is now “Modify Other Users’ Scheduled Exports” with an asterisk because it only applies to exports from organizations that group can view, and users can always modify exports they have created.



Improved wording for “Rollup Tree Groups”

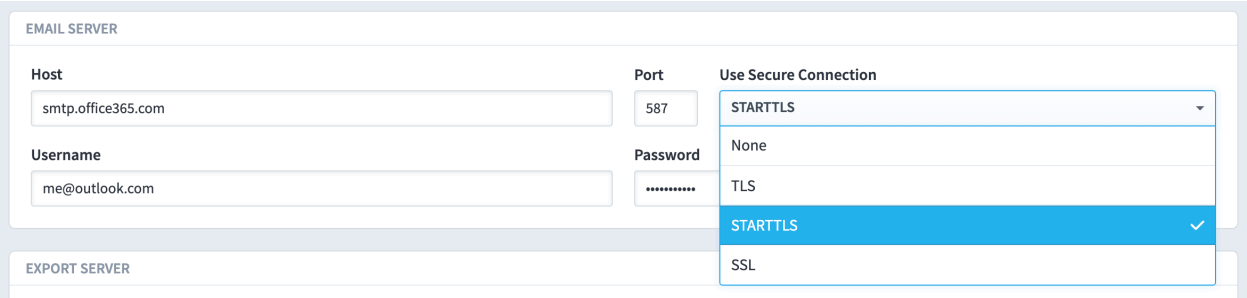
“Rollup Permission Templates” are now called “Rollup Tree Groups”. This new naming much better matches the new functionality of being able to assign organization-level permissions to rollup tree groups.

Both groups and rollup tree groups can have users and groups as members, and both can be given access to view organizations with assignable actions. The main difference is that groups have a single set of members, and rollup tree groups have different members at every level of a rollup tree.



STARTTLS Email Authentication

Administrators can configure email to be sent using STARTTLS authentication. This is used by email providers like Outlook.com.



Reorganized application administration section

The Application Administration section has been reorganized to accommodate all the new settings. This includes new and reordered panels, as well as reordering the contents within each panel.

Improved loading speed for Admin > Users screen

For customers with thousands of users, the user administration screen could take several seconds on slow internet connections. This screen now loads much faster.