



Release Notes v4.3.1

for Planview[®] Spigit

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Welcome to the Planview Spigit 4.3.1 release! I wanted to take this opportunity to introduce our new product version and outline how the new capabilities within it will improve your users' experience of the platform.

Since becoming part of the Planview family, we have been working hard across the board to continue our partnership approach to product development and most importantly, our commitment to a strong product roadmap. This release continues that work and delivers features aligned to each of our roadmap themes: engagement, integrations and data insights.

Over the course of the last year, we have been making strides to further enhance the user experience across the application. This has included new features and enhancements to the core features but also to the administration experience. This release is no different, with a mixture of new features and enhancements being delivered in both the administration and user orientated features.

In this release, we have been specifically working on improvements to our idea team feature and the reminder system for draft ideas. These two areas are part of a user's daily experience of the application and therefore have a real impact on program value as they help ideas to both be submitted to the application and improved through team formation. The features are both heavily driven from our user interaction data and customer feedback over the last few months which is always important to mention. Harnessing the data and feedback to deliver new capabilities remains a consistent theme for the Planview Spigit product team.

I would also like to mention that we are planning a further release before the turn of the year which will deliver our first Planview integration with the addition of a Spigit to Projectplace integration. This is an exciting step forward as it unites the collaborative idea management solutions, we currently offer with the collaborative work management solution in Projectplace.

The three releases that we will have delivered by the end of 2019 represent clear investment in the Spigit product as part of the Planview family. We will continue to deliver at pace in 2020 with exciting new features that truly help you to change the world of work inside of your organization.

Yours faithfully,

Gareth Bradley
Director of Product Management

Idea Teams – Feature Updates

Overview

Idea teams are a crucial feature in any program’s operational tool kit. They help to improve ideas through collaboration, they are an established concept that users understand inherently, and the active formation of a team can be used as an effective step in any idea lifecycle. The way in which teams form inside of the Spigit application really highlights the organic power of the crowd and that’s why we are making it easier than ever before for users to build and join teams in this release. Idea teams have been an integral part of the application since the earliest days and have been iterated upon over the course of the last decade. With this release, we are planning to provide the biggest update yet to the idea team functionality.

Users now demand an instant experience whereby they can collaborate and interact with content and each other without the intervention of a governance model or even an administrator. When we apply this lens to ideas, the ability to help idea owners to build great ideas remains critical but it requires some changes in the way we approach the business of building teams.

Key Details – Maximum Team Size

In certain scenarios, team sizes need to adhere to governance which specifically affects the size of an idea team. For the first time, we will be allowing administrators to set a maximum team size for each challenge, the default of which will be five users.

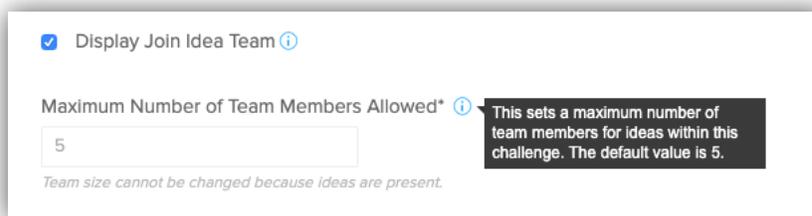


Figure 1 - Maximum team members allowed configuration

The setting is controlled inside of the Idea Settings section of the administration panel. The control of the team size works in conjunction with the existing “team size” graduation threshold which acts as a ‘minimum’

team size but at the stage level rather than challenge level.

The new feature has the following key considerations:

1. The team size will be set to ‘5’ by default.
2. During upgrade, the team size default will be determined by the maximum number of users in an existing idea team. E.g. if a team of 10 exists at the point of upgrade, the maximum will be adjusted to ‘10’ automatically.
3. The team size **must** be set **prior** to ideas existing in a challenge which is standard for many idea and stage settings.
4. The idea owner is not part of the idea team member count and this means that the default will be five team members **plus** the idea owner.
5. Team sizes must be greater than ‘0’ and an attempt to enter a ‘0’ will be auto corrected.

The maximum team size will now be displayed within the idea team user interface components on the view idea page and will, of course, work in an automated fashion to ensure that the number of team members does not exceed the maximum setting.

When running a challenge that leverages the 'team size' graduation setting within any stage, the application will check the 'team size' (minimum team size required for graduation) to ensure that the minimum team size does not exceed the maximum team size stipulated in idea settings.

For example, attempting to enter a '6' in the team size option (within graduation workflow) when the maximum team size permitted is a '5', will result in the application auto correcting the entry to match the maximum team size permitted.

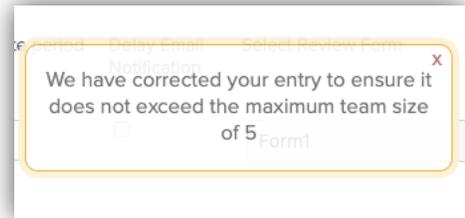


Figure 2 - Error message displayed when auto correcting the team size.

Key Details – Building A Team

The building of a team is an important step in the idea lifecycle and often helps to diversify opinions upon the idea, improving its overall quality. To this end, Idea owners retain control over their own teams, just like they did in previous versions of the application. We have also extended this capability to super administrators and administrators.

Given that we now have the ability to limit team sizes, the overall flow of the team building has been improved to add a "real time" feel without the need for email invites and acceptance. This means that idea owners and other capable roles can add users to the idea team using the same "add team members" option but with a visible reminder against the maximum team count. Adding team members up to the maximum can be achieved by searching on username, skills or interests.

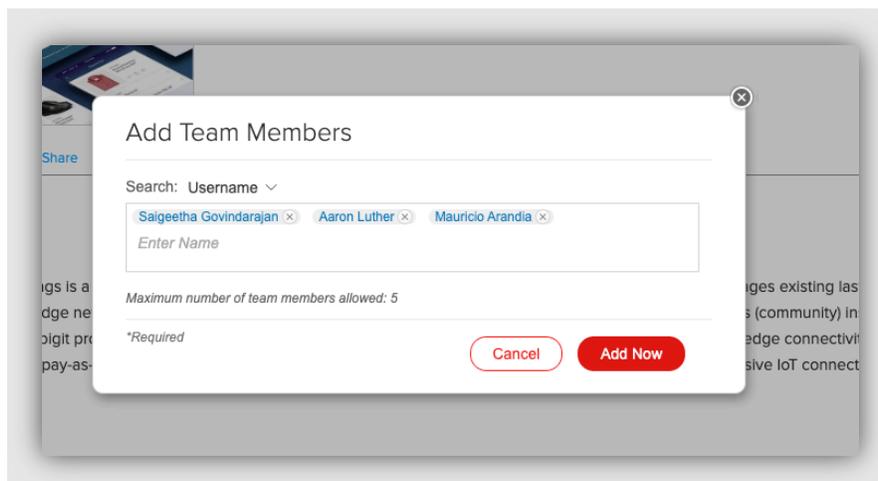


Figure 3 - Adding team members to an idea with a 'maximum number' being displayed.

Once selections are made, the users that have been added to the team will receive both an email notification and a private message within the application's "inbox". The former will be reliant upon the "private message" member communication which can be controlled in the email templates section. The private message will be sent to only users that have been added to a team and can act as a communication option moving forwards without the need to leverage the

comments section. This group message only occurs when users are added at the same time. Individual user additions will not be part of the group message.

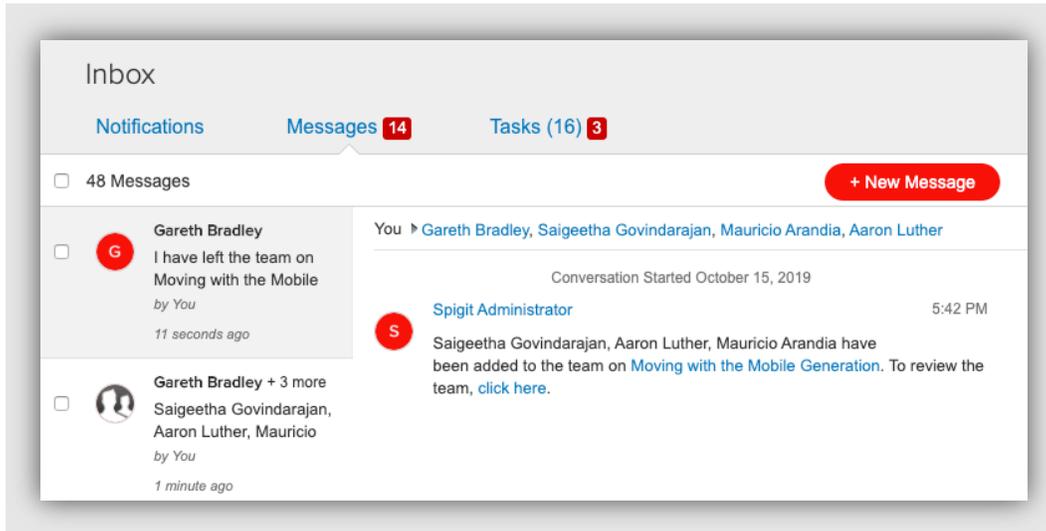


Figure 4 - Private message sent from the user adding the team members to the idea

The user that was carrying out the adding action will also be included in the private message, which will add a record of the action they carried out. All of these components will be included in the standard record retention capability of the application.

When the maximum number of team members permitted have been added to an idea, the user interface will adapt. This will remove the option to add more team members to an idea until a team member leaves the idea which will result in a space being available for new members.

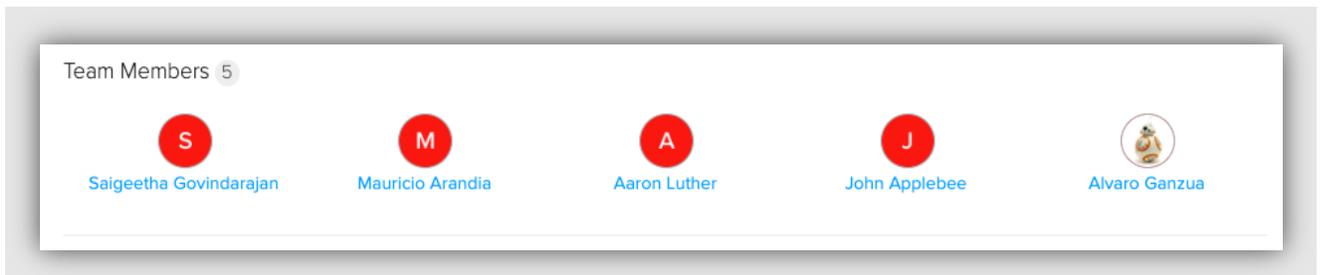


Figure 5 - Maximum team members added with options to add more removed

The ability to leave a team or remove members is also being delivered as part of this new capability and this will present as an option in the following scenarios:

1. Idea owners, super administrators, administrators can remove **any** team member
2. Team members can remove themselves **only**.

This action triggers a new experience for team members which drives transparency in the overall team process.

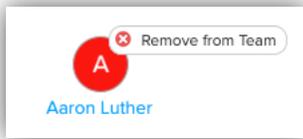


Figure 6 - Remove team member

To remove a team member, or to remove yourself from a team that you have already become a member of, simply roll your mouse over your avatar or the team member you wish to remove, and a dialogue will appear.

Once clicked, the removed user and the team members of the idea will receive a further email and inbox notification that informs them of the change to the team. The activity stream will not be populated by this action.

Key Details – Joining A Team

Now that we have covered the changes to the ways in which idea teams can be built by the idea owner and administrators, let us now take a look at the formation of teams from the perspective of users that want to contribute to ideas.

In a similar fashion to the 'add team members' experience, joining a team will also be instant. We have removed the need for a lengthy request and acceptance email flow and substituted that with a simple instant join flow.

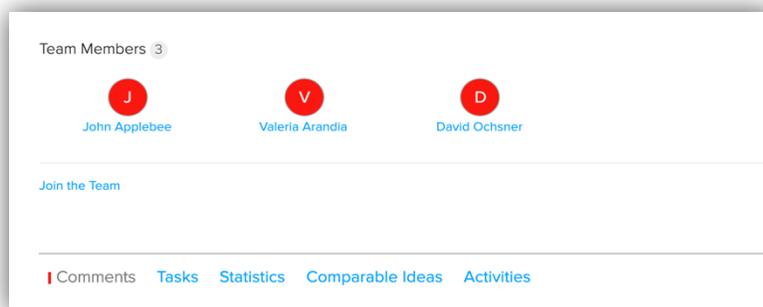


Figure 7 - Join the team

Joining the team remains an option within the 'team members' widget on the view idea page.

This option will be available to all users (as per the previous product versions) until such a time as the maximum number of team members has been achieved for an idea team.

If joining the team results in the maximum number of team members being reached, the 'join the team' option will be removed. The option will only re-appear when there are available slots on the idea team.

When a user clicks "Join the Team" then a pop-up email informs them that they have initiated the action and that a message has been sent to the idea owner. At this point, the page will auto refresh and the user will be added to the idea team. A private message will be sent via email and the application inbox to inform existing team members, the new team member and the idea owner of the update. This will adopt the standard format established earlier in this section.

In all scenarios, the user profile of team members will be automatically updated to reflect team membership when joining and leaving teams.

Draft Idea Reminders

Overview

Sometimes users start ideas when they experience a moment of inspiration whether that be in the workplace, on the way to work or even at home. Those ideas often involve a great deal of consideration and as such, they are saved as drafts for completion at a later point. The ability to return to those draft ideas is, of course, something that Spigit has offered for some time but on occasions, users forget about them.

Key Details

It's important to ensure that users are reminded of their draft ideas. Idea generation remains a key driver in culture change within organizations. Providing a follow up mechanism improves the ratio of users entering the idea posting process and successfully completing it.

If a user saves an idea as a draft, their user dropdown menu will automatically be updated with a new 'i' icon. This icon will appear only once the page has refreshed and the draft has been stored against the user's profile.

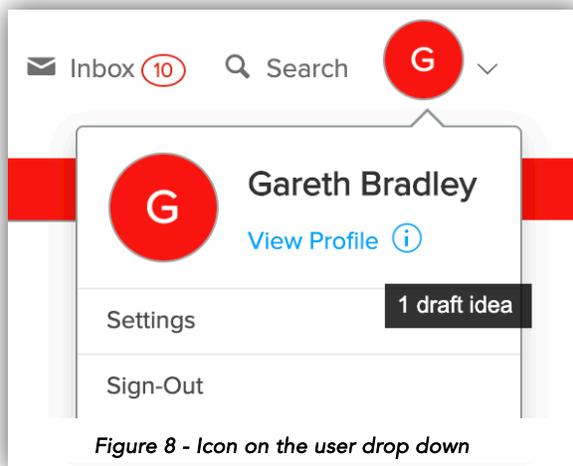


Figure 8 - Icon on the user drop down

The icon includes a hover over which indicates the total of draft ideas in the user's profile that can be accessed.

To access the drafts, a user simply needs to click the 'i' to be taken via a deep link straight to the ideas section of the activity panel within their profile. The intent is to remove confusion for users who may not have been able to locate drafts previously.

The icon will remain visible until the user posts the idea to the challenge. Should the delete idea option be available for a user, deleting the idea will also remove the icon from the drop-down menu.

If a user logs out of the application, upon their next login, we will inform them of their draft ideas through a simple dialogue box that appears immediately after login. The dialogue message informs the user of the number of draft ideas they have as well as a direct (deep) link to their profile. This will act as an additional 'pull' to the draft idea for each user as long as their draft ideas exist.



Figure 9 - Login prompt

Additional Administration Enhancements

Auction Page

The create auction page had been fully refreshed to bring it up to speed with the new user interface for administration pages. This page now leverages a standard text box layout as well as the new rich text editor panel.

Please note, there have been no functional changes to this page.

Email History Panel

As part of our ongoing monitoring of support requests and questions, we have implemented a new super administrator panel which details the email history of the instance.

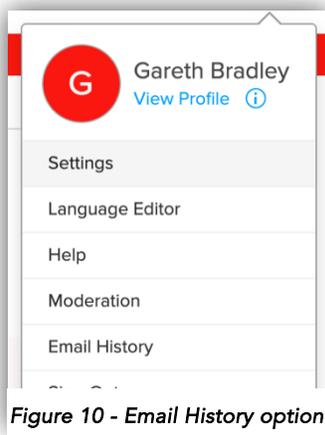


Figure 10 - Email History option

The email history section can be accessed only by super administrators of the instance. It is located in the user pull down menu which resides under the avatar image or letter in the top menu section of the application.

The email history is intended to be used by super administrators to check and respond to queries that they may receive around email. This feature negates the need for a support ticket to be entered, increasing the response time for administrators and reducing the need to contact Planview support.

Once a super administrator accesses the panel, they are presented with a search section that can be used to query the email dispatch to any email address that the application may have had cause to send email to.

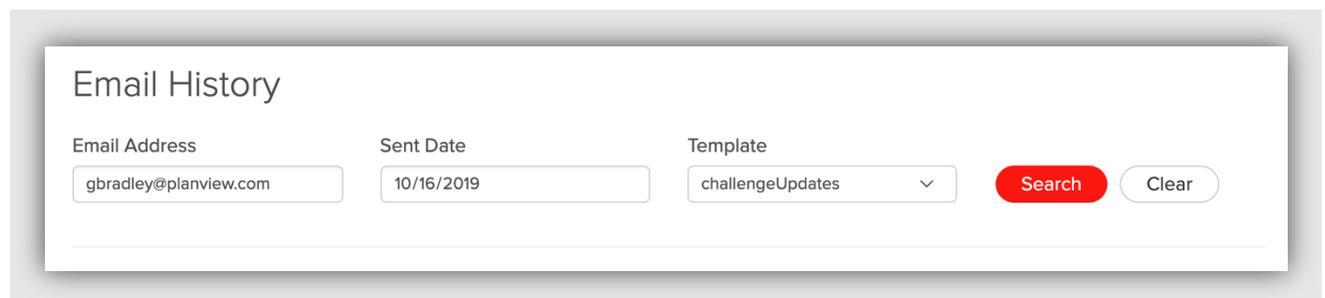


Figure 11 - Search query example

The query is constructed by completing:

- Email Address (as entered in the user panel)
- Sent Date (the date the email was sent)
- Template (drop down populates with all email templates that the application can send)

When the search query is built, executing it will either return a 'no results found' dialogue or a list of emails that match the query details.

Please note, it is only possible to search one email address at a time but all emails from a given date can be queried by using the sent date option.

Idea List Page

In similar fashion to the auction creation page, the idea list page has been updated to include the current user interface design elements.

The font size, background colors and dialogue options now match the user interface that can be found elsewhere in the administration and user experience.

Please note, there have been no functional changes to this page.

Additional Desktop Fixes

Overview

This section details all of the fixes which have been delivered as part of the release along with the scenario in which they presented themselves prior to being fixed.

Administration

Access Mode Error – Switching to ‘private – required login’ was not possible when an error existed in simple expression used by the ‘private – user attribute’ setting. This has now been fixed to allow a switch between the two.

Editing Stats – Editing the stats section of the overview page is now possible through the xcliff language file. This will now populate with individual strings for each section of the stats pop up.

User Import Password Updates – When loading a list of users into the application, the password reset/update functionality is now available.

Challenges

Winning Ideas - It is now possible to see a complete list of ideas inside of the ‘Select Winners’ section for display on the challenge homepage.

Emails

Clickable Links - An issue where the view idea page was not accessible from the idea submission notice to administrators and moderators has been fixed. The link will now work as expected.

Ideas

Close Ideas – When ideas are closed and re-opened, the correct information will display according to the state (successful or unsuccessful) whenever the decision is updated.

Dollar Symbol Display – The \$ symbol was being displayed with a __DOLLAR__ string instead of the correct \$ in the View Idea and View Ideas page. This has now been corrected.

Permissioned Data Fields – Idea forms that contained data fields that were only visible to Administrators and Challenge Sponsor roles will now display data correctly, according to the role permission, even if the field is edited.

Permissioned Data Fields – Idea forms that contained sections that were only visible to Administrators and Challenge Sponsor roles will now display the content in the idea template as well as in the idea reporting tables.

Private Comments – This corrects an issue whereby the switching from private comments back to standard comments was not possible without a page refresh. This has now been re-added back to the control panel.

Private Comments - Comments that were posted in private comments sections had been appearing in some activity streams. This has now been correctly permissioned.

Login

Report Analyst Role – Users that held the ‘Report Analyst’ role and had a user ID of more than 30000 were being blocked from entering sites set to Private Required Login. This has been corrected so that neither user ID nor the Report Analyst role block access in this scenario.

Navigation

Compact View - The display of the idea link from the tile inside of the compact view will now be consistently clickable.

Publishing

Font Size - The footer font size will now display according to the desired WYSIWYG font size on both the Overview and the View Ideas pages.

Rich Text Editor – When publishing content that leverages html codes, they will now be presented in their correct format and without the html being present.

Search

Sort by Star Rating – We have corrected an issue whereby the 'sort by' star rating was not accurately displaying the results by the total average star ratings.

Tasks

Removing Tasks after GDPR – When a user is anonymized using the identity removal functionality, tasks will now be removed from their assignment to that user.

API Updates & Fixes

Idea Closure Information

A new 'Get' request to idea closure information for a given idea.

Path Parameters

Table 22. /ideas/{ideaId}/close-info

Parameter	Description
ideaId	Idea Id whose close information is listed.

Response Structure

Path	Type	Description	Optional
message	String	The field is displayed when the idea is still open.	true
links	Array	Hypermedia Links.	false
id	Number	Idea Id.	false
content	String	HTML content of close template fields.	false
content_list	Array	Close Template fields data. The field is not displayed if "content" has old data.	false
content_list[].label	String	Label of the template field.	false
content_list[].value	String	Value of the template field.	false
content_list[].name	String	Name of the template field.	false
stage_id	Number	Current idea stage Id. The field indicates if the idea was closed successfully or unsuccessfully. Refer to Idea Stages API for stage names	false

Links

Relation	Description
self	Link to self.
idea-stages	Link to idea stages.
parent	Link to the idea details.

Example Request

```
GET /api/v1/ideas/156266/close-info HTTP/1.1
Authorization: Bearer $2a$10$CNntQtTjKewMj1YJIEJUbuhUwMkbl2UmtVOW9POTaxjamFR6liOrS
```

Example Response

```
HTTP/1.1 200 OK
Strict-Transport-Security: max-age=31557600; includeSubdomains;
Content-Type: application/json;charset=UTF-8
Vary: Accept-Encoding
Keep-Alive: timeout=5, max=100

{
  "id" : 156266,
  "content" : "<div class=\"userIdeaContent\" ><strong>What is the Primary annual Impact?</strong></div>",
  "content_list" : [ {
    "label" : "What is the Primary annual Impact?",
    "value" : "<p>Time Savings</p>",
    "name" : "select-primaryAnnual"
  }, {
    "label" : "Quantify based on your selection",
    "value" : "<p>5000</p>",
    "name" : "numeric_input-quantifyPA"
  }, {
    "label" : "What is the annual Secondary Impact?",
    "value" : "<p>Cost Savings</p>",
    "name" : "select-secondaryAnnual"
  }, {
    "label" : "Quantify based on your selection",
    "value" : "<p>10000</p>",
    "name" : "numeric_input-quantifyPA"
  }, {
    "label" : "What will the next steps be?",
    "value" : "<p>Launch to client</p>",
    "name" : "ContentClose"
  } ],
  "stage_id" : 5,
  "links" : [ {
    "rel" : "self",
    "href" : "https://[base_domain]/api/v1/ideas/156266/close-info"
  }, {
    "rel" : "idea-stages",
    "href" : "https://[base_domain]/api/v1/communities/1/stages"
  }, {
    "rel" : "parent",
    "href" : "https://[base_domain]/api/v1/ideas/156266"
  } ]
}
```

Idea Team Members List

A new 'GET' request to list the team members associated with a given idea.

Path Parameters

Table 23. /ideas/{ideaId}/team-members

Parameter	Description
ideaId	Idea Id for which the team members are requested.

Request Parameters

Parameter	Description
grant_type	password.
client_id	The App Id of the application that is making this call.
client_secret	The App Secret of the application.
username	The user's username.
password	The user's password.

Response Structure

Path	Type	Description
links	Array	Hypermedia Links.
content	Array	Team member list.
content[].user_id	Number	Id of the user.
content[].user_name	String	Username of the user.
content[].first_name	String	First name of the user.
content[].last_name	String	Last name of the user.

Links

Relation	Description
self	Link to self.
parent	Link to the idea.

Example Request

```
GET /api/v1/ideas/156955/team-members HTTP/1.1
Authorization: Bearer $2a$10$uryh.Kew9cuqG14VMfkmfecBLotg/HBYHwML/tYrMfkgPin5L6M.6
```

Example Response

```
HTTP/1.1 200 OK HTTP
Strict-Transport-Security: max-age=31557600; includeSubdomains;
Content-Type: application/json; charset=UTF-8
Vary: Accept-Encoding
Keep-Alive: timeout=5, max=100

{
  "links" : [ {
    "rel" : "self",
    "href" : "https://[base_domain]/api/v1/ideas/156955/team-members"
  }, {
    "rel" : "parent",
    "href" : "https://[base_domain]/api/v1/ideas/156955"
  } ],
  "content" : [ {
    "user_id" : 21489,
    "user_name" : "apiautobot1",
    "first_name" : "API Member",
    "last_name" : "User",
    "links" : [ ]
  }, {
    "user_id" : 21491,
    "user_name" : "apiautobot5",
    "first_name" : "API Administrator",
    "last_name" : "User",
    "links" : [ ]
  } ]
}
```

Predictions Details

A new 'GET' request is available to list the details of an idea with prediction information.

Path Parameters

Table 21. /ideas/{ideaId}/prediction-info

Parameter	Description
ideaId	Idea Id whose prediction information is listed.

Response Structure

Path	Type	Description	Optional
message	String	Message describing why the api was not able to get the response.	true
total_count	Number	Total number of prediction info for this idea.	false
links	Array	Hypermedia Links.	false
content[].questionid	Number	Id of the prediction question.	false
content[].question_label	String	Label of the prediction question.	false
content[].question_type	String	Type of the prediction question.	false
content[].center_value	Number	Center value of the prediction result.	false
content[].high_value	Number	High value of the prediction result.	false
content[].low_value	Number	Low value of the prediction result.	false
content[].deviation	Number	Standard deviation of the prediction result.	false
content[].certainty_score	Number	Certainty score of the prediction result.	false

Example Request

```
GET /api/v1/ideas/146391/prediction-info HTTP/1.1
Authorization: Bearer $2a$10$eYgqXMVJ9X00yH0nmoX4rebvHNUVgjJML2yBE4wjPE0JofixixhI2
```

HTTP

Example Response

```
HTTP/1.1 200 OK
Strict-Transport-Security: max-age=31557600; includeSubdomains;
Content-Type: application/json;charset=UTF-8
Vary: Accept-Encoding
Keep-Alive: timeout=5, max=100
```

HTTP

```
{
  "total_count" : 3,
  "links" : [ {
    "rel" : "self",
    "href" : "https://[base_domain]/api/v1/ideas/146391"
  } ],
  "content" : [ {
    "questionid" : 0,
    "question_label" : "Time to implement",
    "question_type" : "TIME",
    "center_value" : 134,
    "high_value" : 268,
    "low_value" : 0,
    "deviation" : 134,
    "certainty_score" : 0.0
  }, {
    "questionid" : 1,
    "question_label" : "Cost to implement",
    "question_type" : "COST",
    "center_value" : 287466,
    "high_value" : 574932,
    "low_value" : 0,
    "deviation" : 287466,
    "certainty_score" : 0.0
  }, {
    "questionid" : 2,
    "question_label" : "Revenue per year",
    "question_type" : "REVENUE",
    "center_value" : 414099,
    "high_value" : 811634,
    "low_value" : 16563,
    "deviation" : 397535,
    "certainty_score" : 0.03999999910593033
  } ]
}
```

Retired Features & Widgets

Overview

This section denotes the removed features and widgets that will no longer be available following this release.

Idea Team Currency Sharing

The ability to offer virtual currency to team members is being retired with this release. This means that team member stock holding in an idea is no longer possible. All administration options relating to the stock option have been removed.

Impact: At upgrade, team members who had previously been granted stocks in return for their membership of an idea team will have them removed. This will not impact any earned currency as stock options only converted when an idea was closed. Previously closed ideas and associated stock options will not be impacted.

Idea Team Members Can Invite Others

This administration setting has been removed as part of the redesign for the feature. This provides stronger control of the team whilst maintaining the overall simplicity of the new user experience.

Impact: The feature will be removed upon upgrade and will no longer be available even if it was enabled prior to upgrade.

Idea Team Section of My Profile/User Profile

The sections that contained invites received, pending and accepted is being removed to accommodate the new user experience.

Impact: All pending invites will be converted at migration

Legacy SAML Single Sign On

We no longer support the legacy SAML single sign on integration as of this release. We only support integrations that are managed through Shibboleth.

Impact: All Single Sign On integrations will now use Shibboleth.

Security Updates

Overview

In this section, we outline the security updates that have been applied to the application as part of this release.

Key Details

Updated Security Link – The link to the security documentation has been updated.

Scripting - Cross site request forgeries are now blocked at login.

Passwords - The auto completion of passwords by the browser on the user login page is now disabled.

Single Sign On - We have now removed all code support for the legacy SAML single sign on integrations. This is no longer supported.

Supported Browsers

The application supports the following browsers in the 4.3.1 version:

Firefox – 69.0.3 for Windows 10 Pro, MacOS 10,

Chrome - 74.0.3740.75 for Windows Professional SP1 and 74.0.3729.167 for MacOS 10,

Safari - 12.1.1 for Mac OS 10 & 11.0.3 for MacOS 10

IE11 - versions; 11.765.9600.17843 / Windows 7 professional SP1, 11.753.17763.0 / Windows 7 Professional N SP1 & 11.765.17134 / Windows 10 Pro.

MS Edge - Windows 10 Pro & Enterprise

Safari for iOS, Chrome on Android. Please note that 'Private Browsing' or 'Incognito Mode' is not supported on a Mobile Browser.

Supported Languages

The following languages are supported as “Tier 1” or out of the box. A full translation of the user interface is available with this release in the following languages:

English (United States)
French (France)
Spanish (Latin America)
Spanish (Spain)

Russian (Russia)
Chinese (China)
German (Germany)
English (United Kingdom)

Portuguese (Brazil)
Japanese (Japan)
Arabic (Saudi Arabia)

