Spider Strategies®

What's New in 5.5

Guide to new features in Spider Impact 5.5
Updated October 11th, 2022

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Your success is important to us!

Spider Impact 5.5 is a massive release with major new functionality. It features custom scoring, allowing you to choose exactly how you want to rate your performance. It introduces amazing new data visualizations like geographic maps, heatmap-style colors in reports, and chart sorting. It can pull data from thousands of SaaS tools through Zapier, or from forms you've built and shared in the new Forms section.

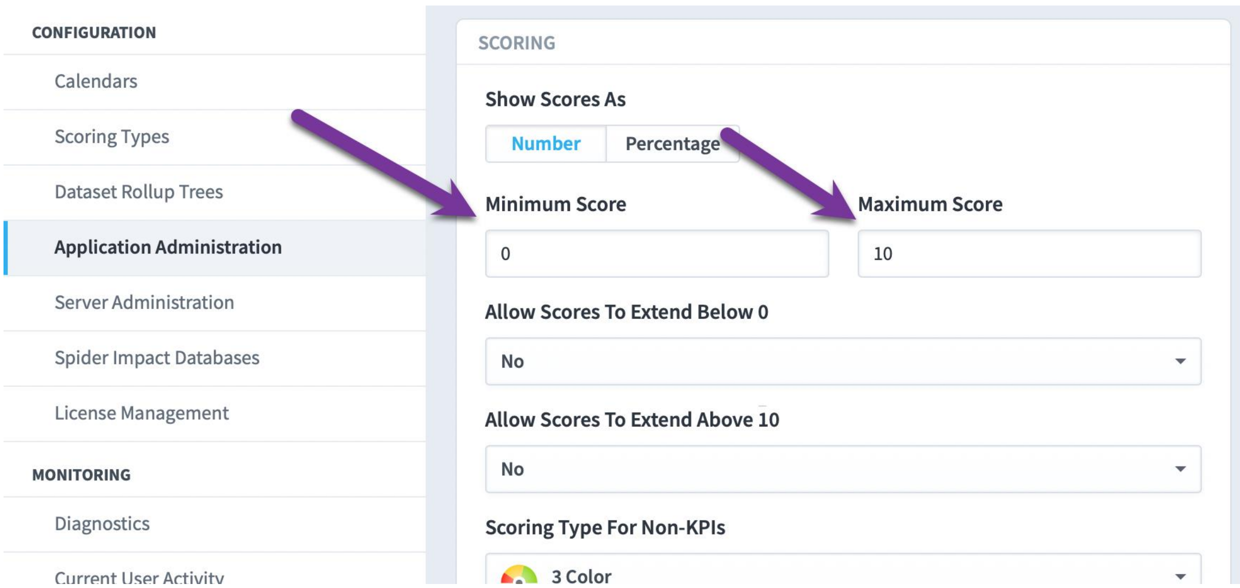
Just as importantly, Spider Impact 5.5 is about refinement. It polishes all the functionality that was introduced in version 5.0, and has dozens of other usability improvements throughout the software.

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/

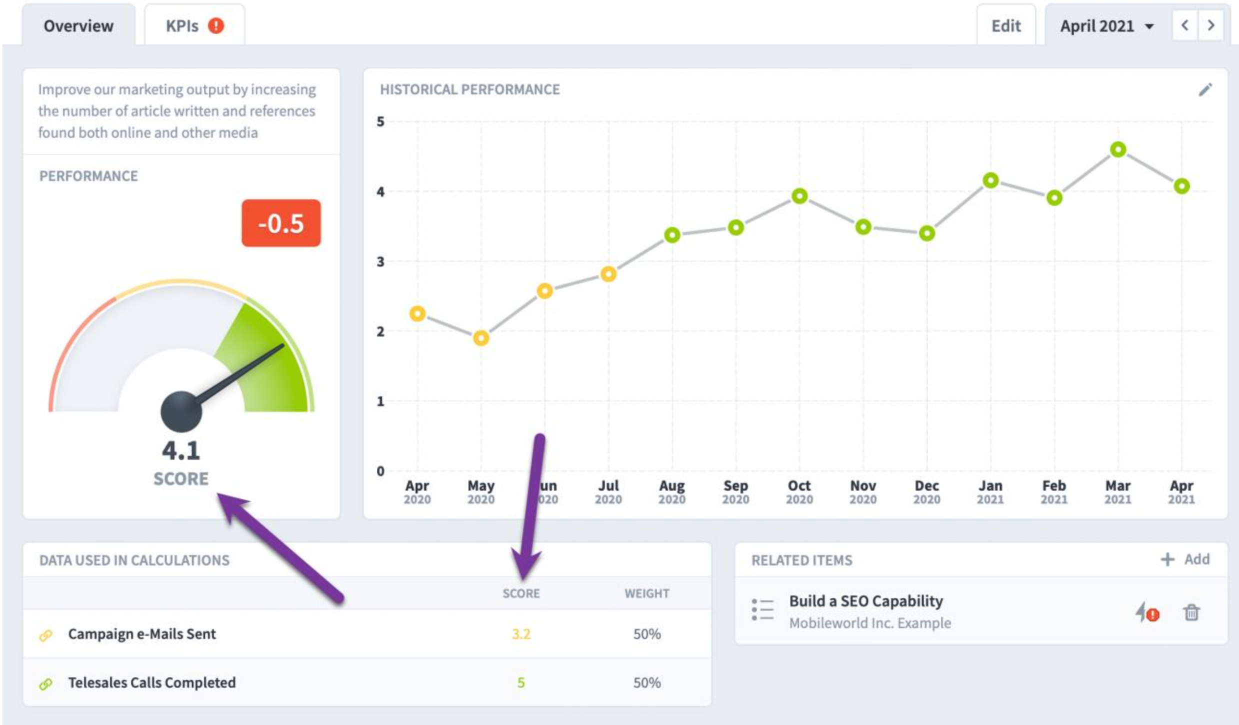
Scoring

Configurable application scoring range

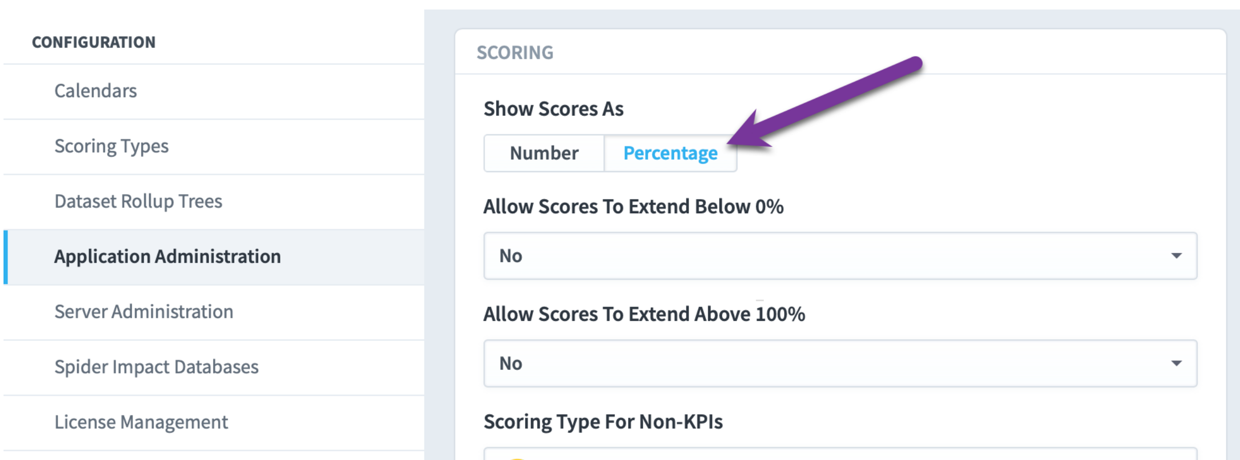
There are several new configuration options that allow you to fully customize the scores that can be assigned to scorecard items. By default, scores are still 0 to 10, but you can change these to any minimum and maximum value.



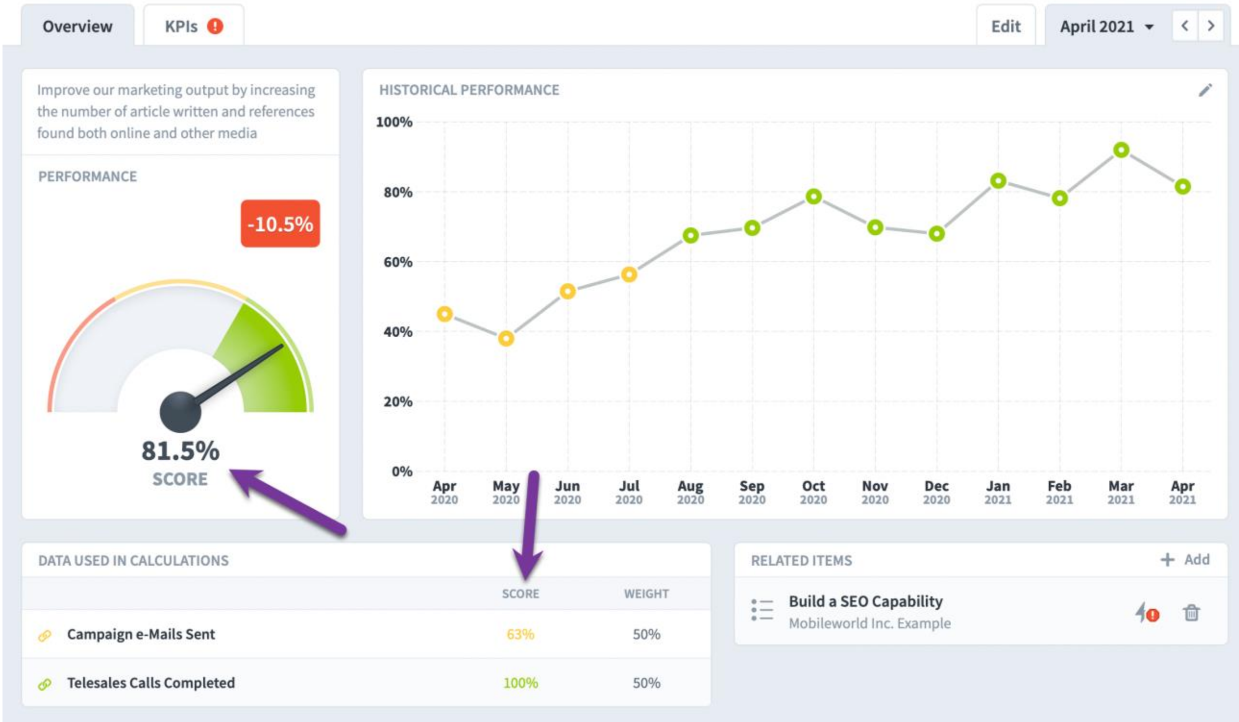
Can change the minimum and maximum scores to whatever you want, however. For example, this is what 0 to 5 scoring looks like.



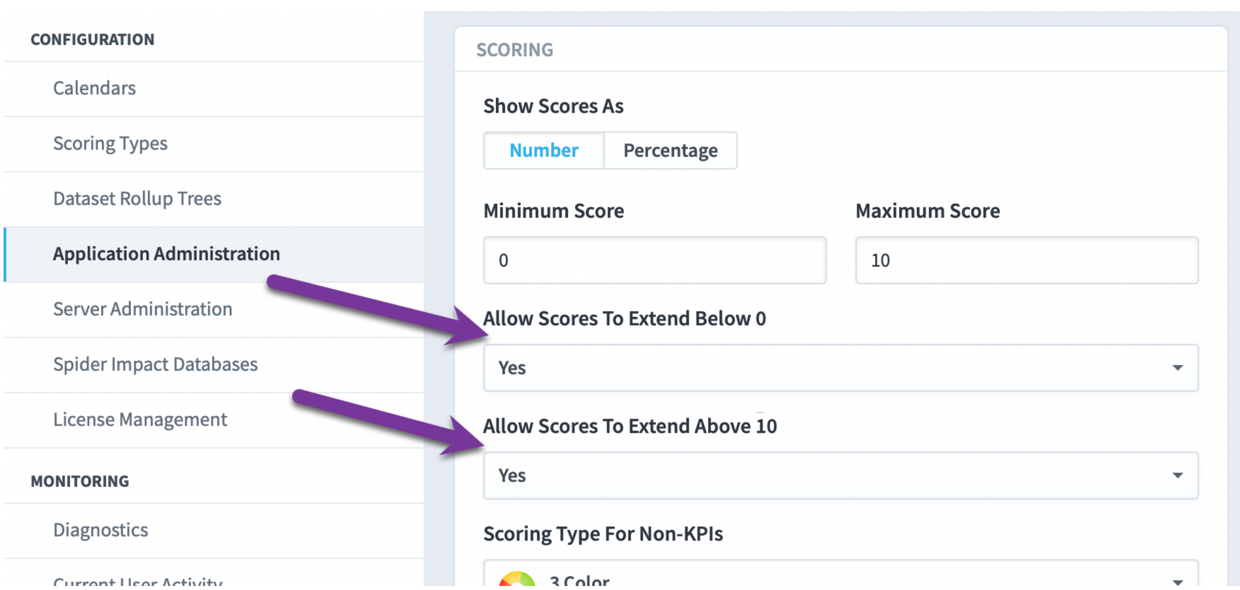
You can also choose to show your score as a percentage.



This is what that looks like in the software.



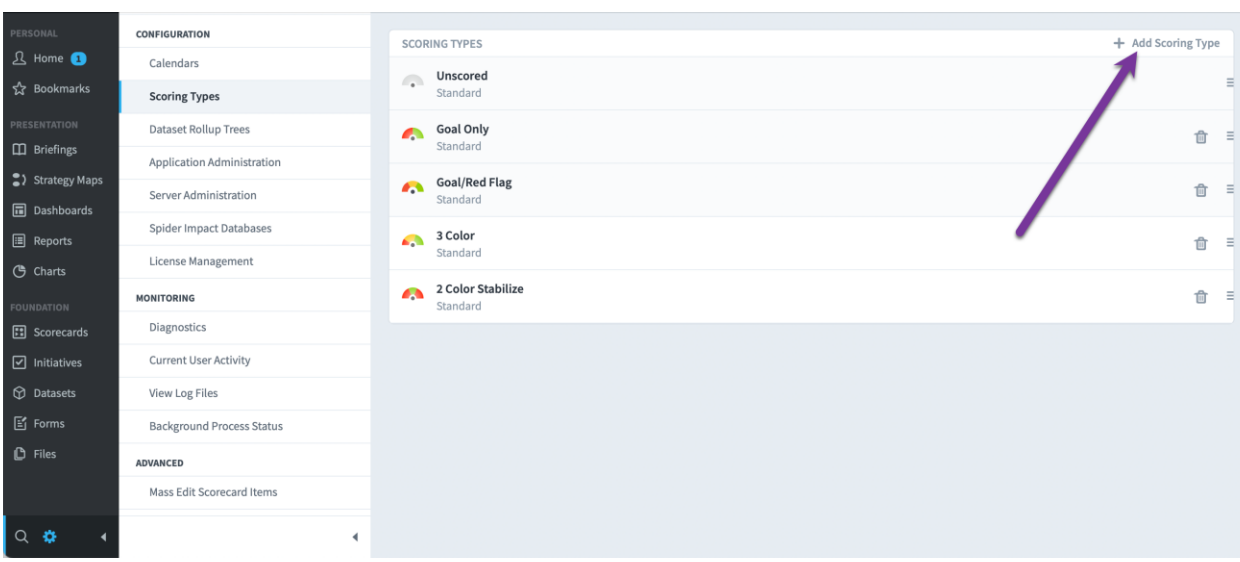
You can even choose to allow your scores to go outside of the scoring range. Here we're allowing scores to extend below 0 and above 10.



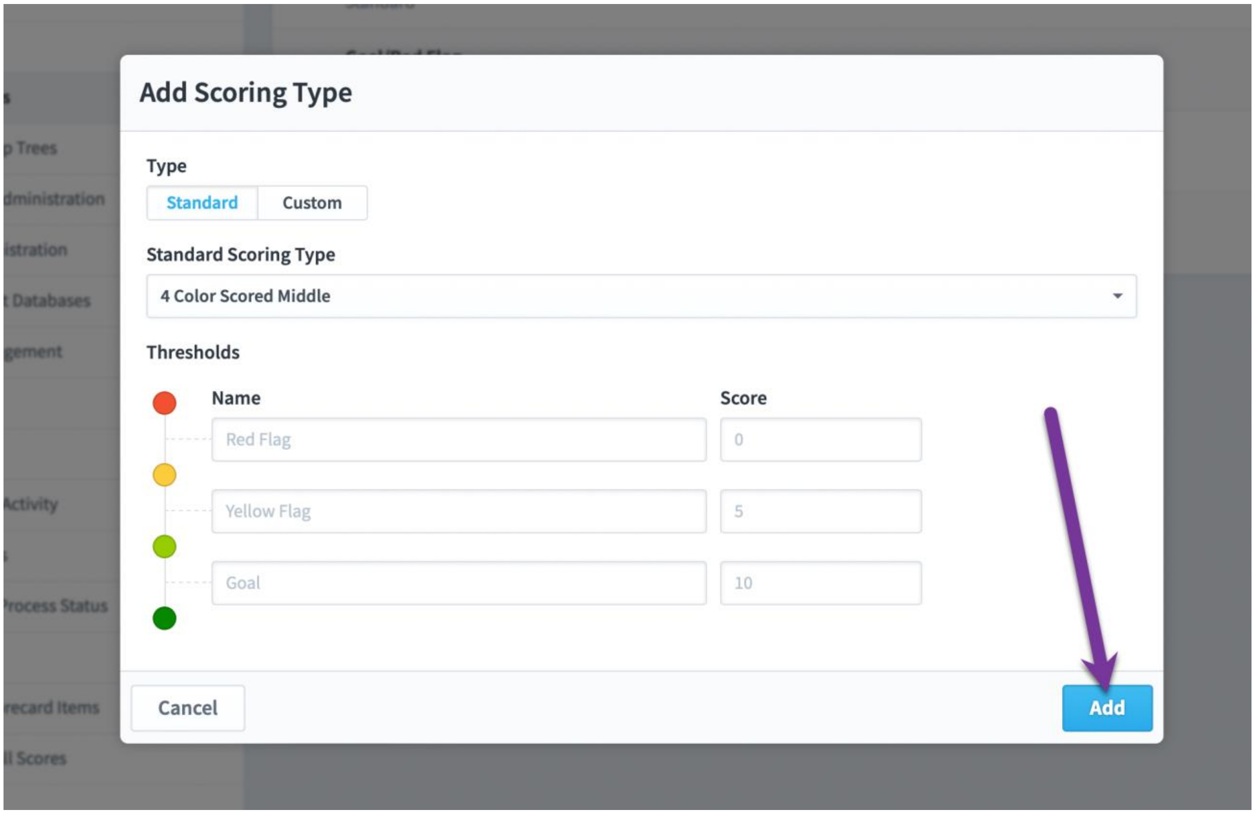
Now when a KPI value is significantly above or below the goal, it can get a score outside of the normal range. In this example a value of 60% would be a perfect score of 10, but because its value is 60.5%, its score is 10.8.

New “Scoring Types” Administration page

There is a new Scoring Types page in the Administration section that allows you to choose which scoring types are available for KPIs. This allows system administrators to show fewer scoring type options to users. You can order scoring types via drag and drop, and you can add new scoring types by clicking the “Add Scoring Type” button.

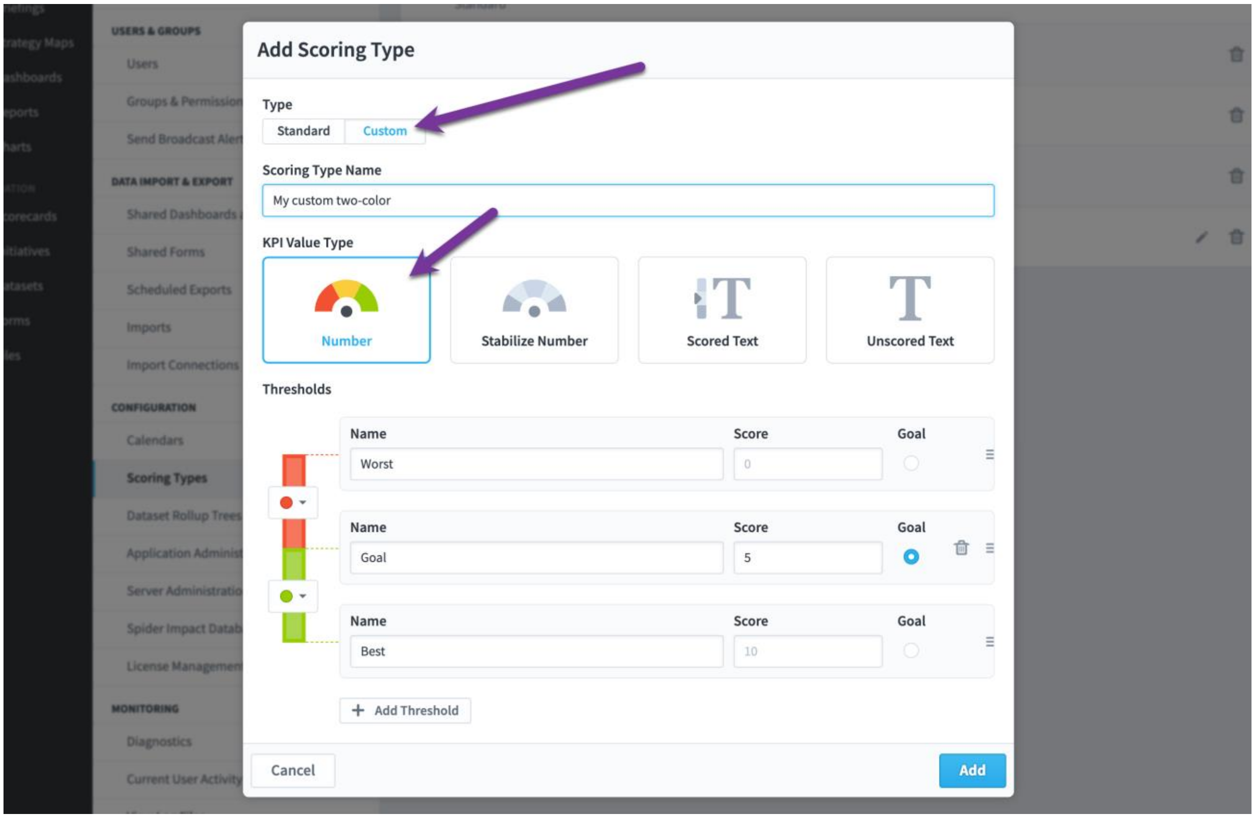


Here we’re adding the standard “4 Color Scored Middle” scoring type, and when we select it, we can see a preview of that scoring type’s thresholds and scores.

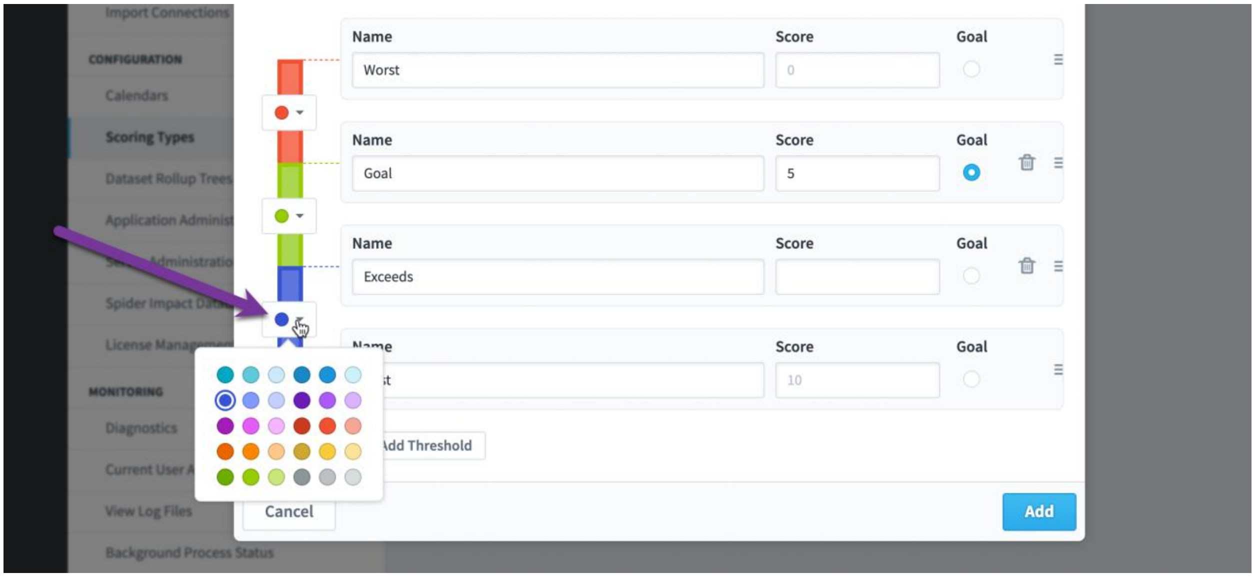


Custom number scoring types

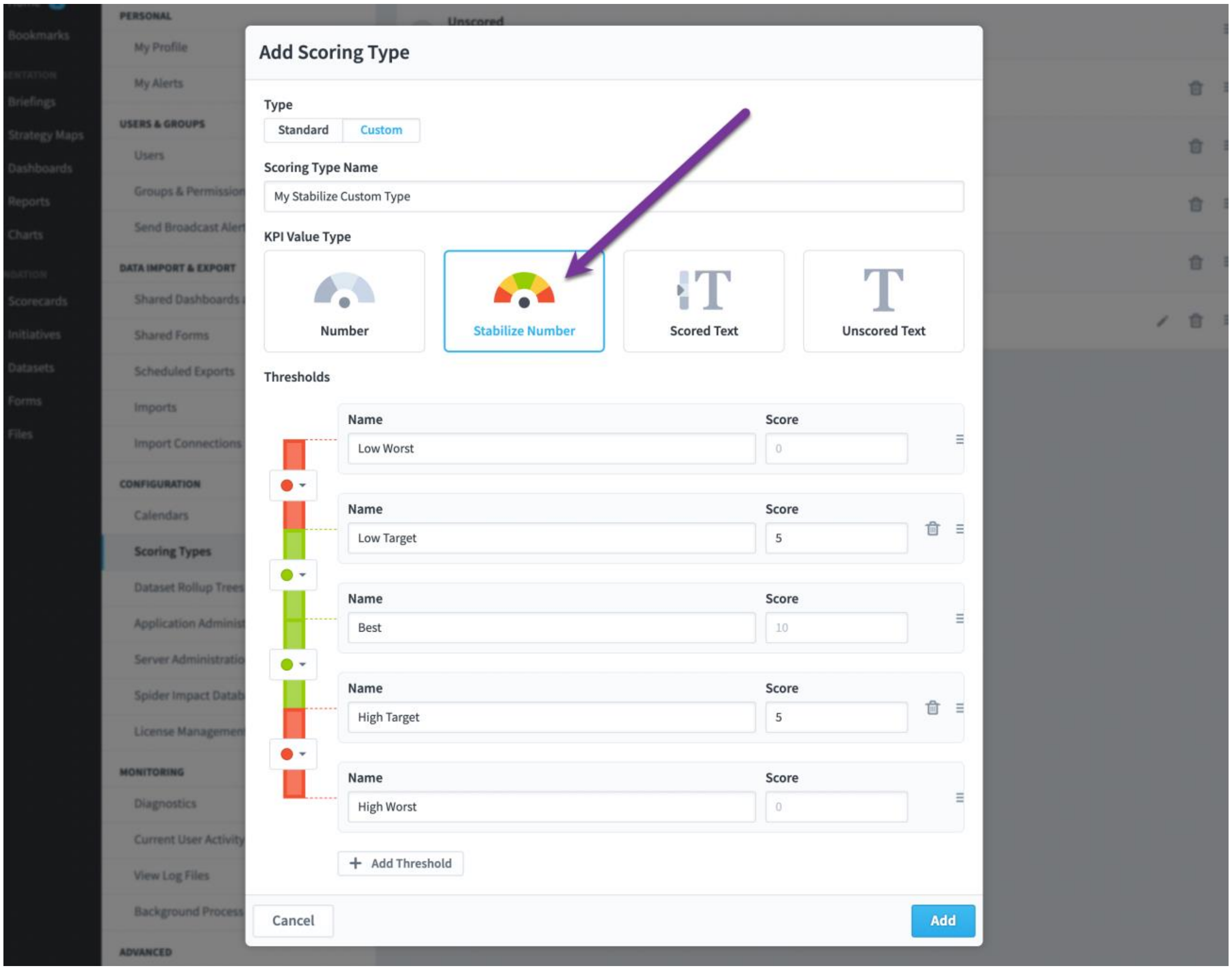
You can now add custom KPI scoring types to match any unconventional colors or thresholds you may have in your organization. Custom Number scoring types allow you to choose the number of thresholds, what they're called, what their scores are, and the colors between them.



Here we've added a fourth threshold and are choosing to make the KPI blue whenever the score is more than 9.



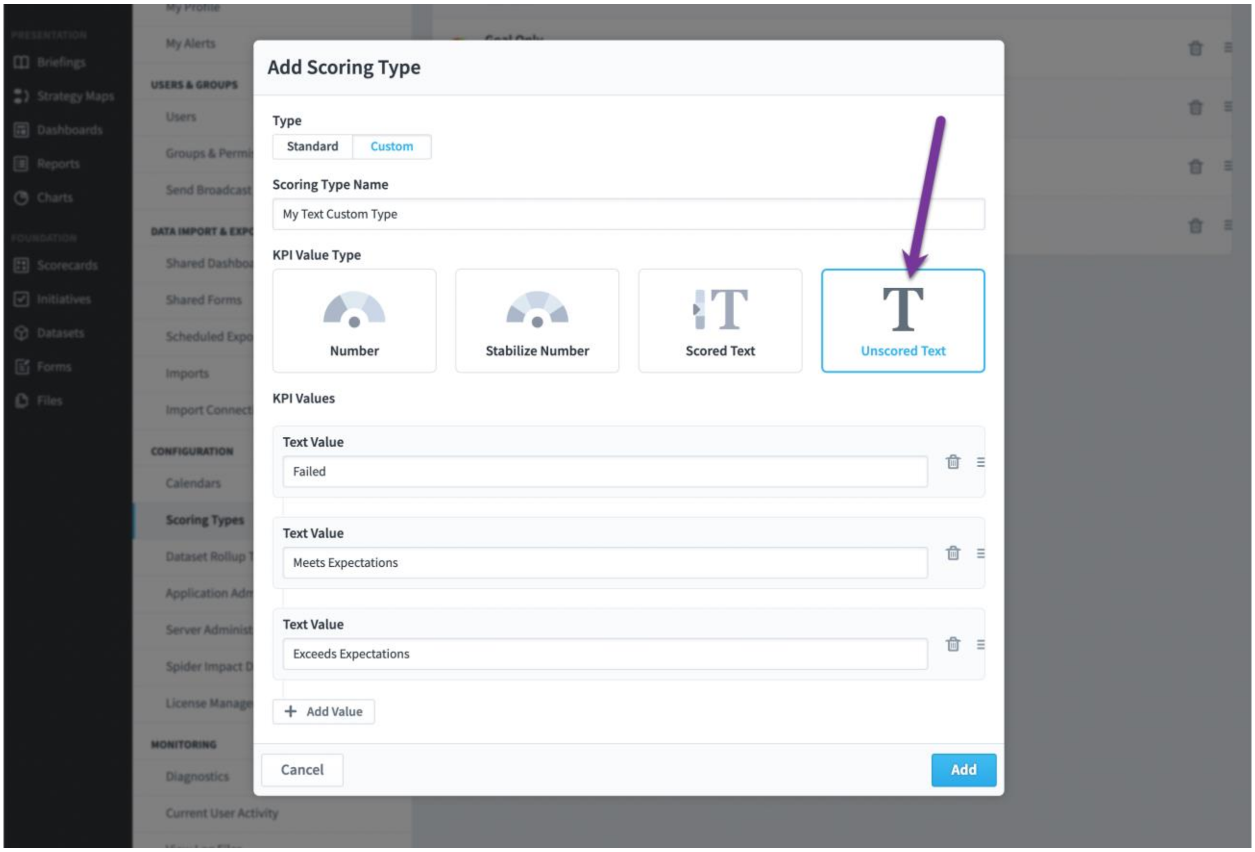
You can also create Stabilize Number custom scoring types. They're the same as Number custom scoring types except the highest score is in the middle.



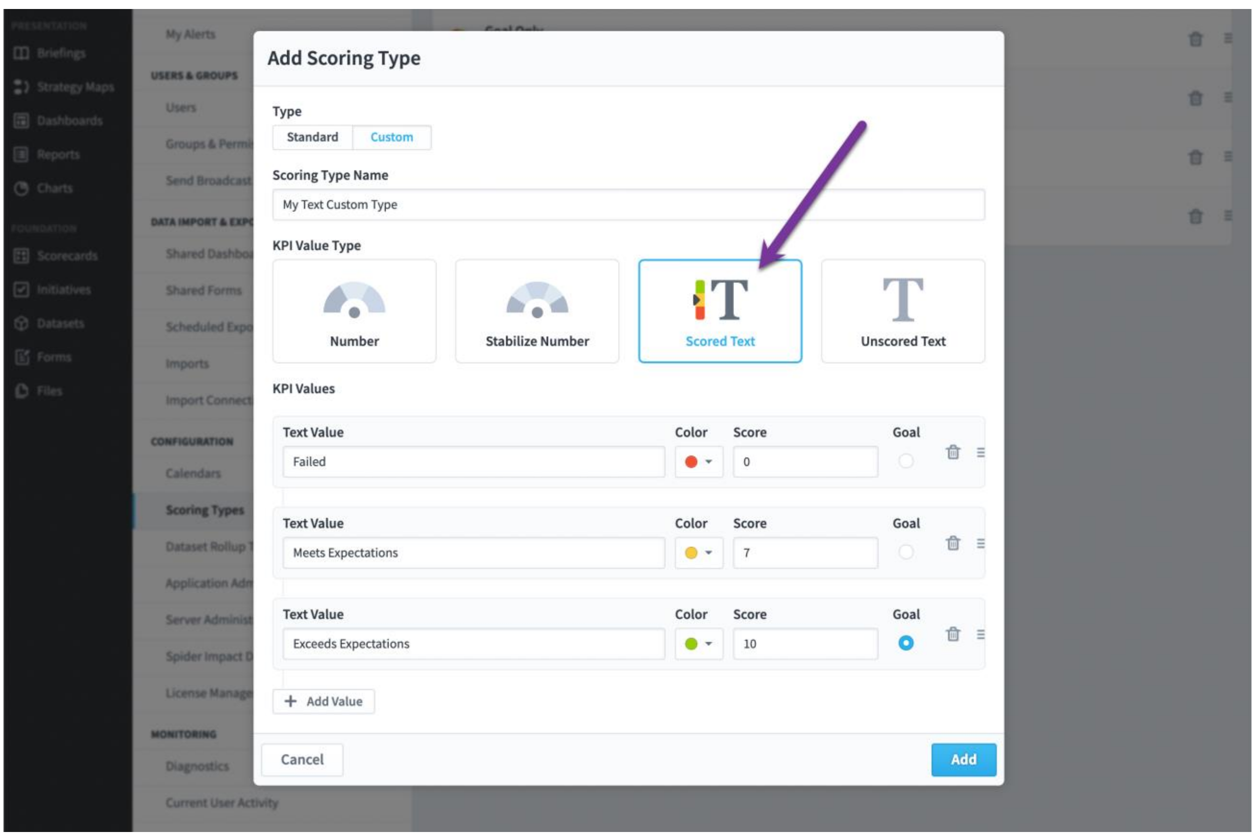
Custom text scoring types

You can now create custom text scoring types where you create a predefined list of text KPI values that a user can choose from. In this example we've chosen Unscored Text with the following options:

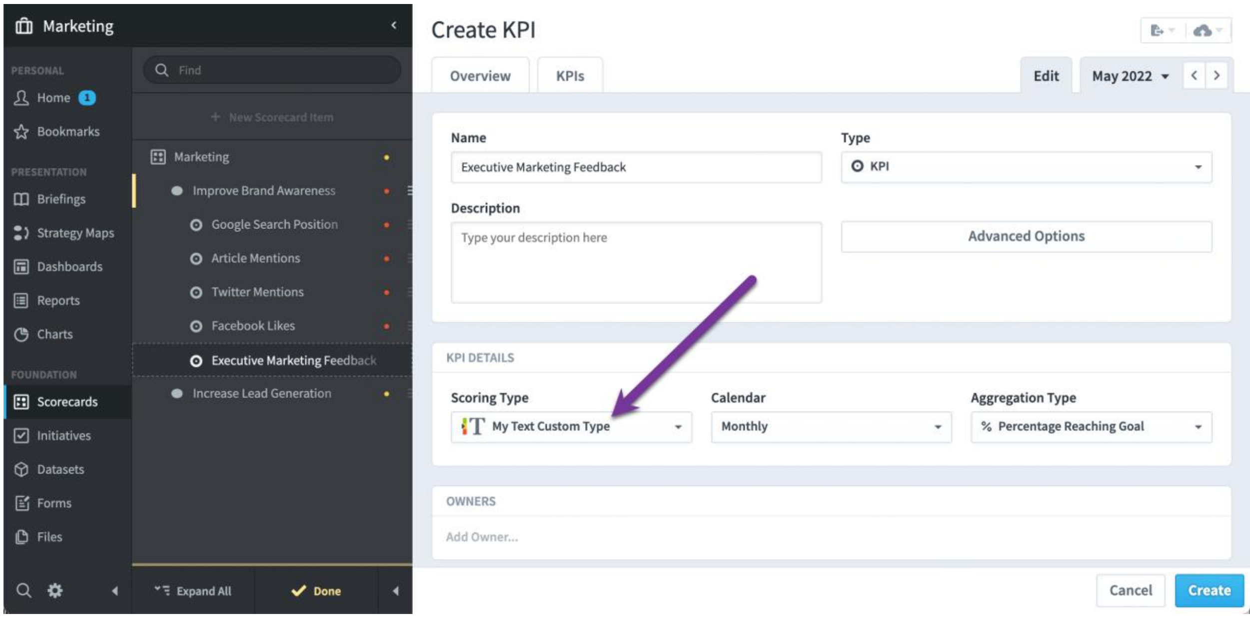
- Failed
- Meets Expectations
- Exceeds Expectations



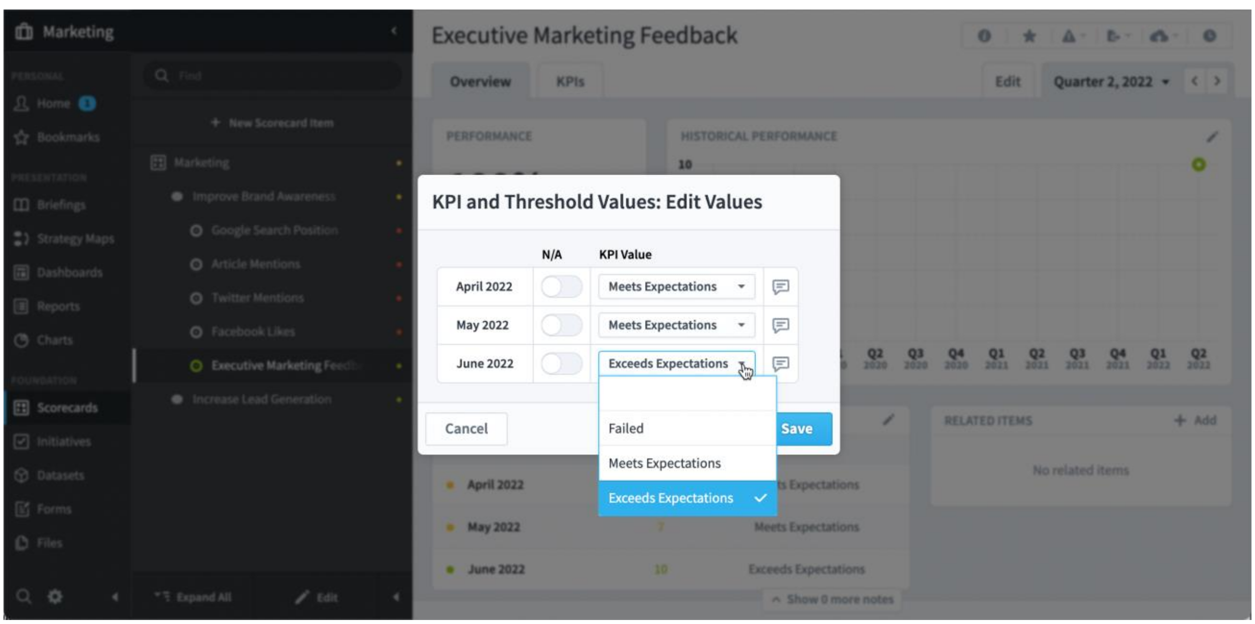
When you choose Scored Text each KPI value also has a color and a score.



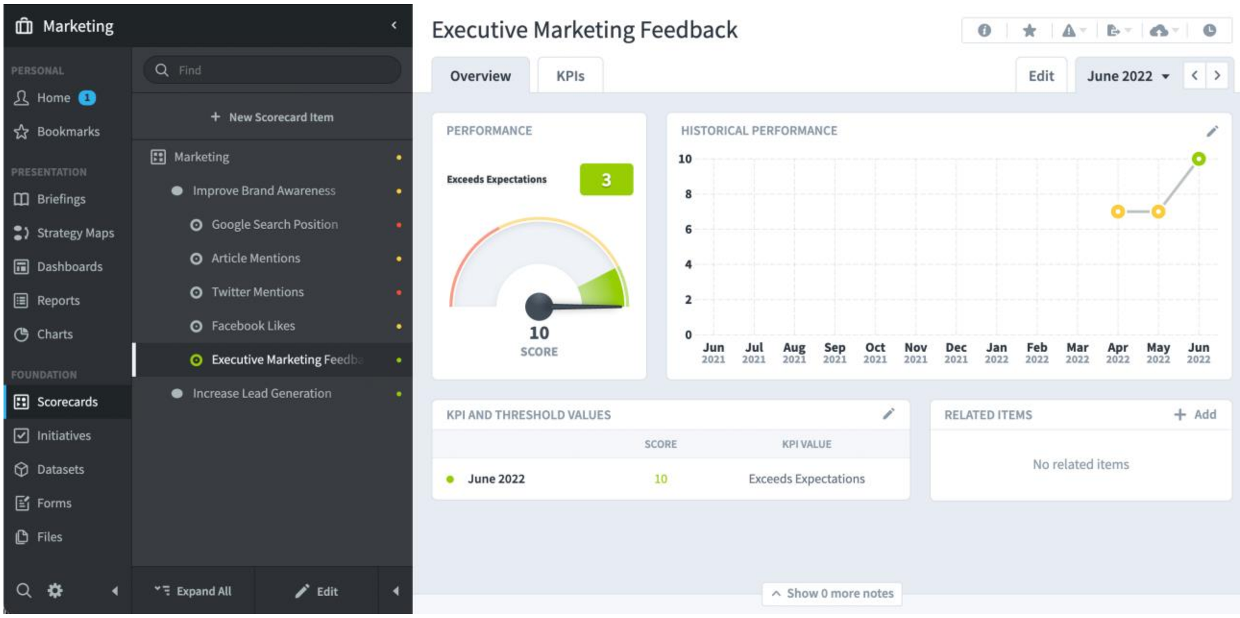
Once a custom text scoring type is created you can create KPIs that use it. Here we have an "Executive Marketing Feedback" KPI.



Updating text KPIs is the same as updating number KPIs except that the values are chosen from a dropdown.



And because scored text KPIs have colors and scores, they can be graphed just like any other scorecard item.

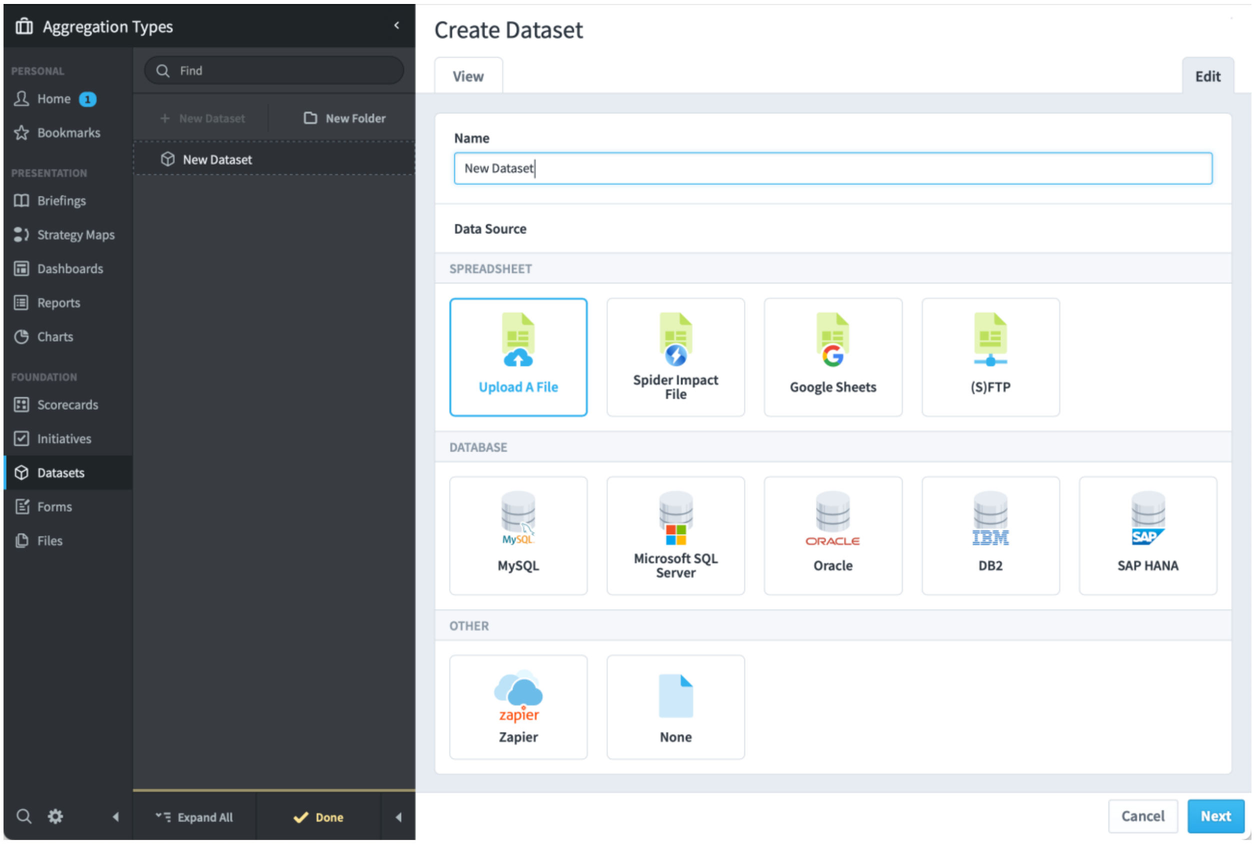


Importing Data

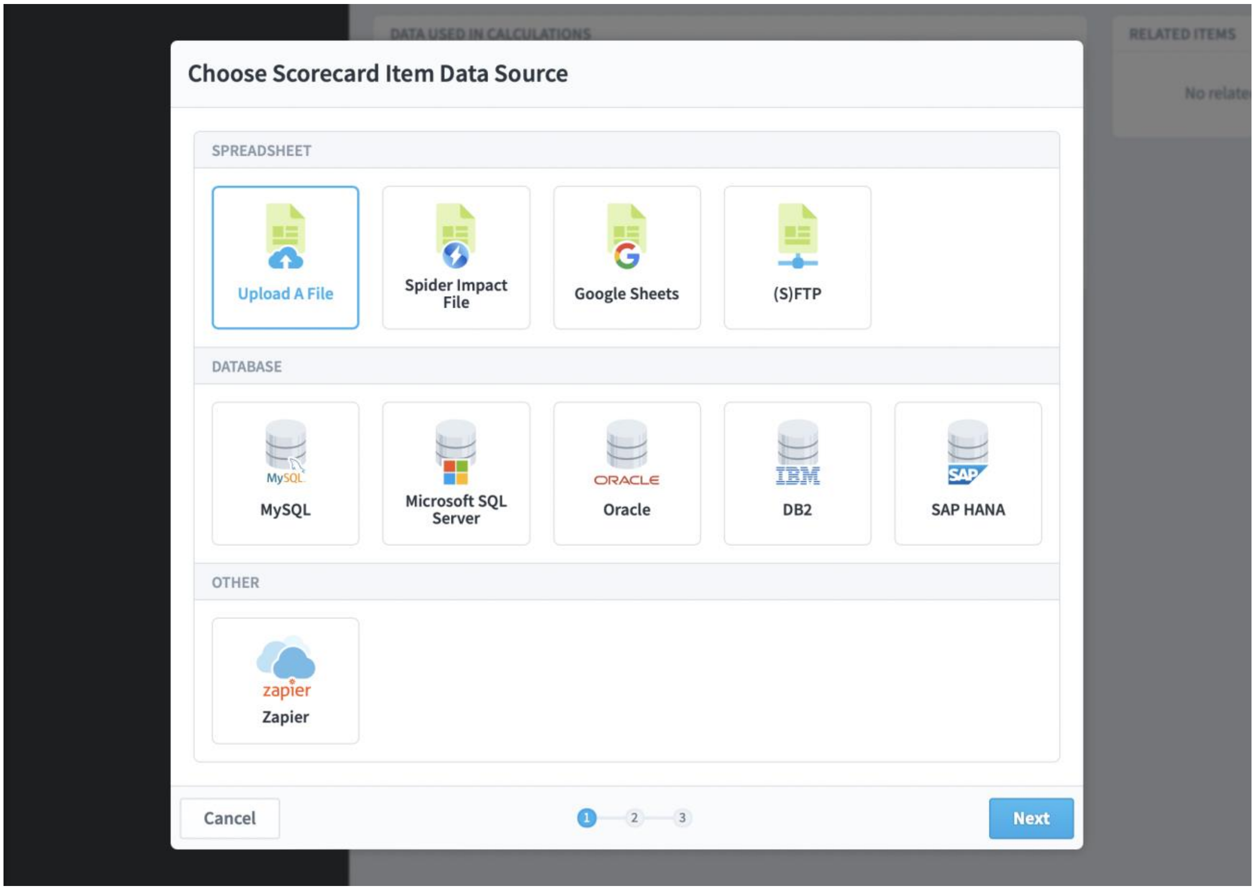
Data source menus

The first step of any data import is now an expanded choice of data sources. This new focus on data sources rather than data format is more intuitive, and it does a better job of showing what data sources are supported.

For example, this is the first step when creating a dataset.



And this is the first step when importing scorecard items. All data sources are now available for all types of imports.



Importing data with Zapier

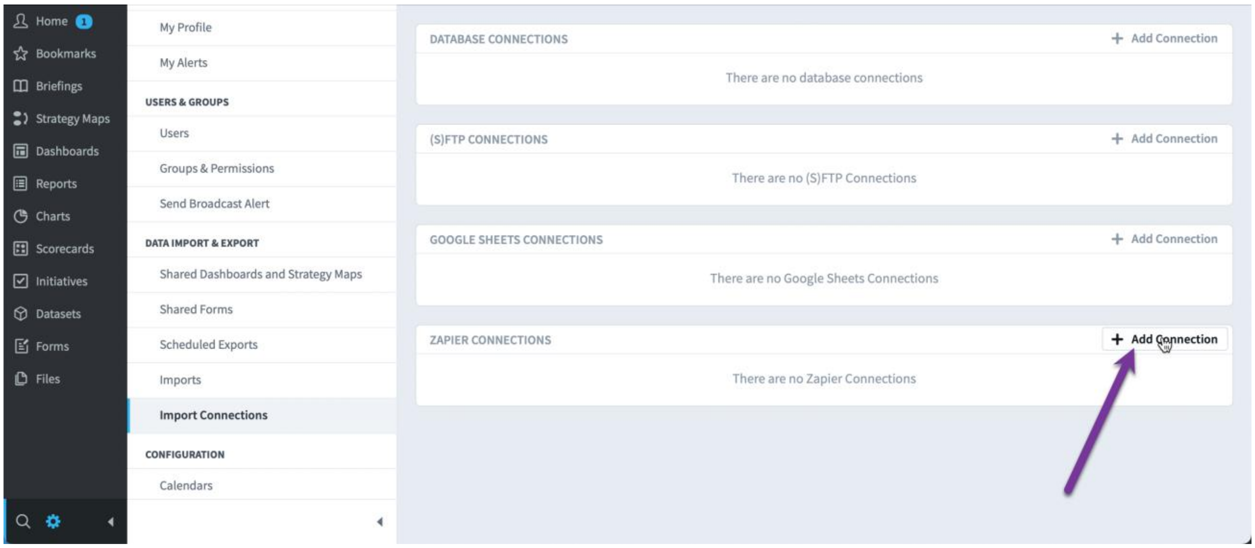
Zapier is a website that allows you to choose from over 5,000 data sources, and then push your data to Spider Impact. It's a paid service that allows technical people to import data from other websites without coding.

Zapier only works with cloud software that has chosen to share their data with Zapier. Each company creates and maintains their own Zapier integration, and Zapier acts as a traffic cop, pulling data from one piece of software and pushing it into another.

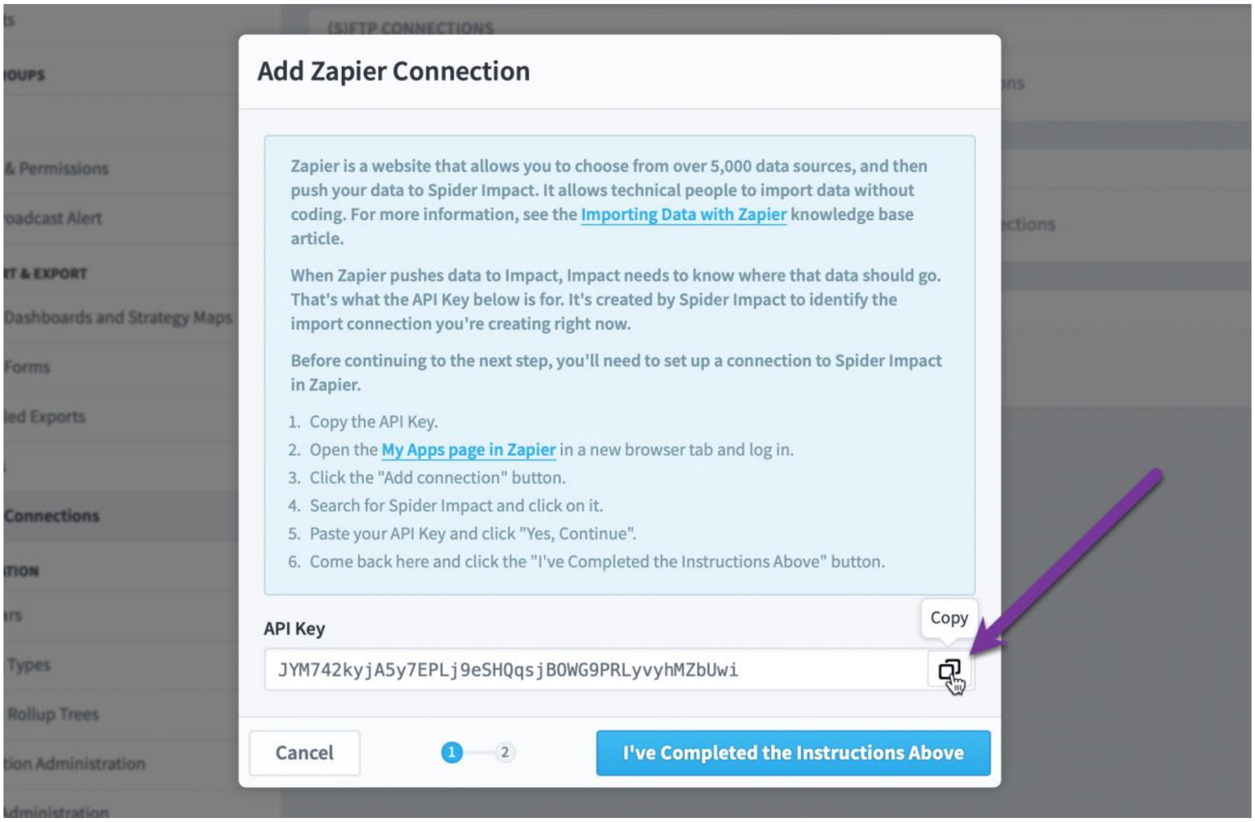
Finally, it's important to note that not every Zapier data source is a great fit for Spider Impact. That's because the types of data that you can get depends on what the owners of that data source have chosen to share with Zapier. For example, some data sources expose their full historical data, while others only send information about events as they happen.

Setting up the connection between Zapier and Spider Impact

The first step is to set up a Zapier import connection inside of Spider Impact. Here we're clicking "Add Connection" on the Administration > Import Connections page.

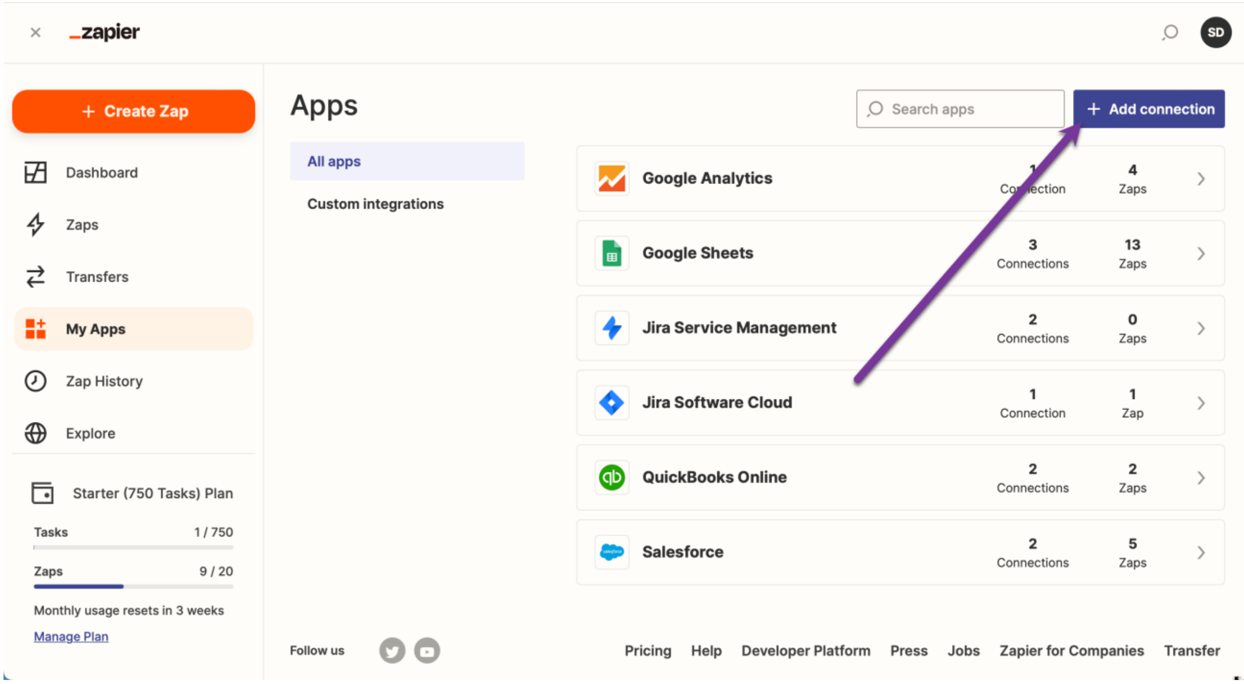


This opens the "Add Zapier Connection" dialog. When Zapier pushes data to Impact, Impact needs to know where that data should go. That's what the API Key here is for. It's created by Spider Impact to identify the import connection you're creating right now.

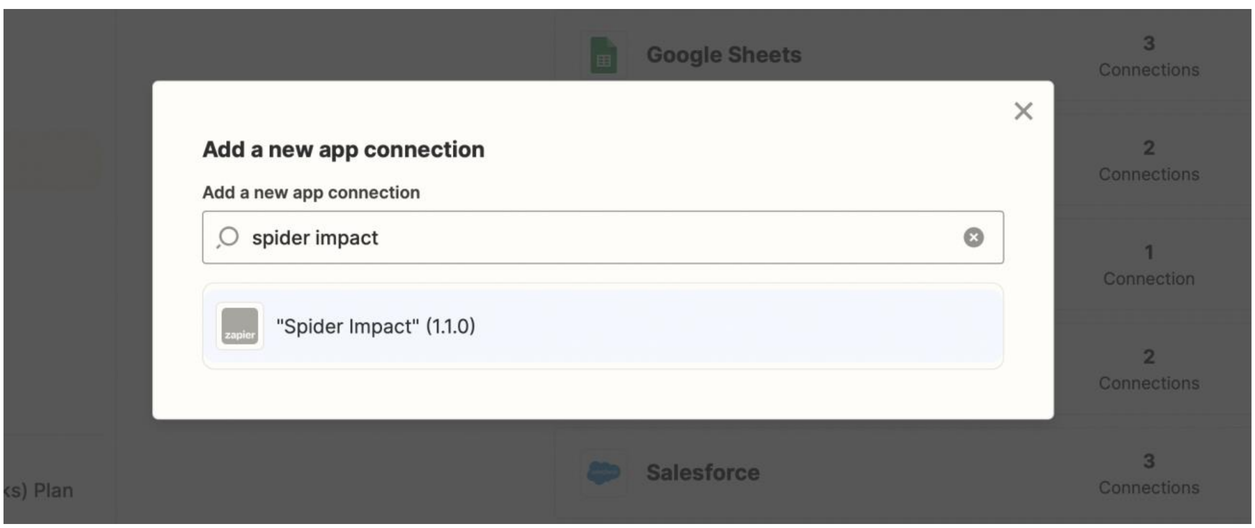


Zapier is going to need this API Key, so click the "Copy" button to copy it.

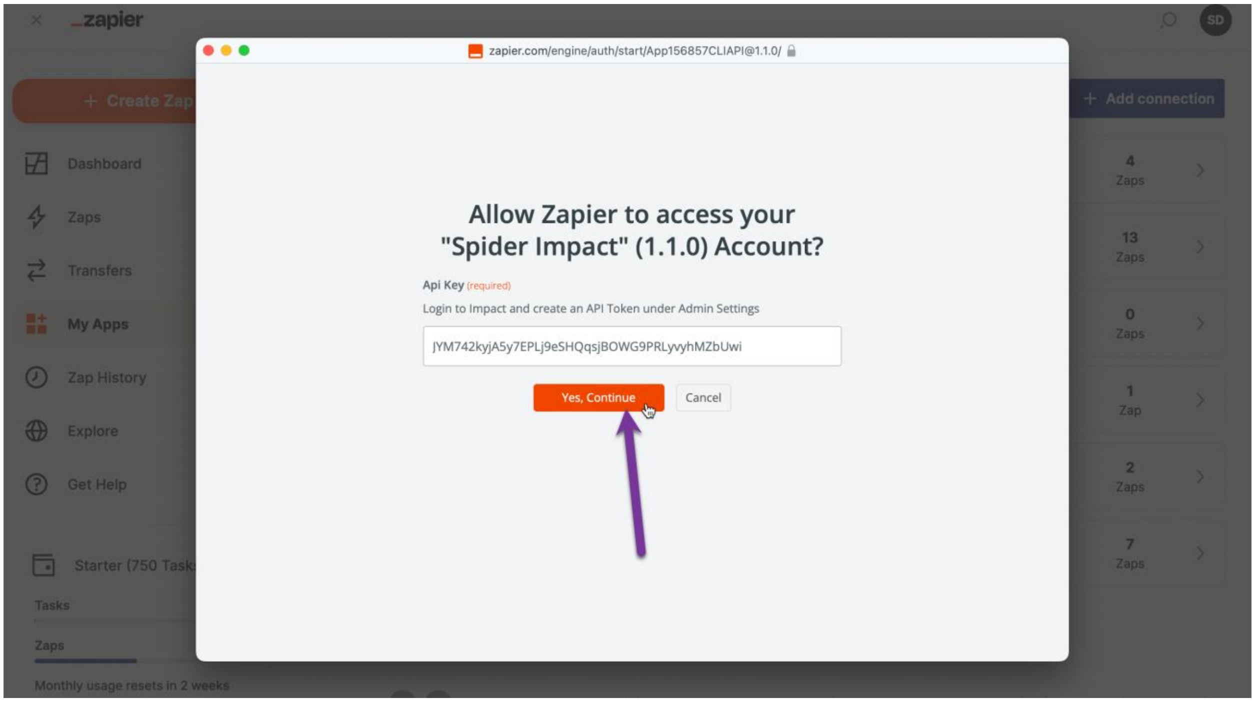
Before continuing to the next step in Spider Impact, you'll need to set up a connection to Impact in Zapier. Open the My Apps page in Zapier in a new browser tab and log in. Then click the "Add connection" button.
https://zapier.com/app/connections



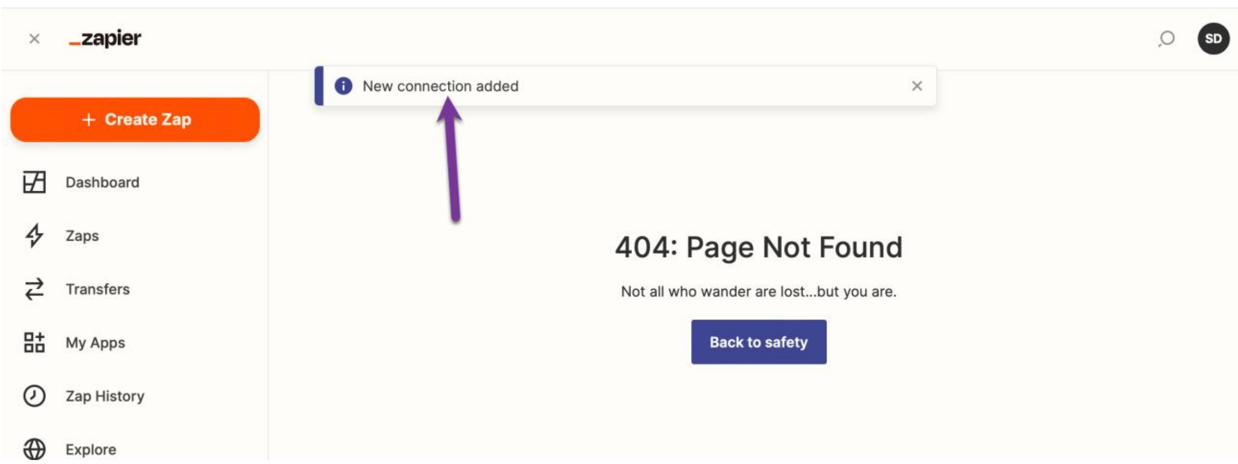
Search for Spider Impact and click on it.



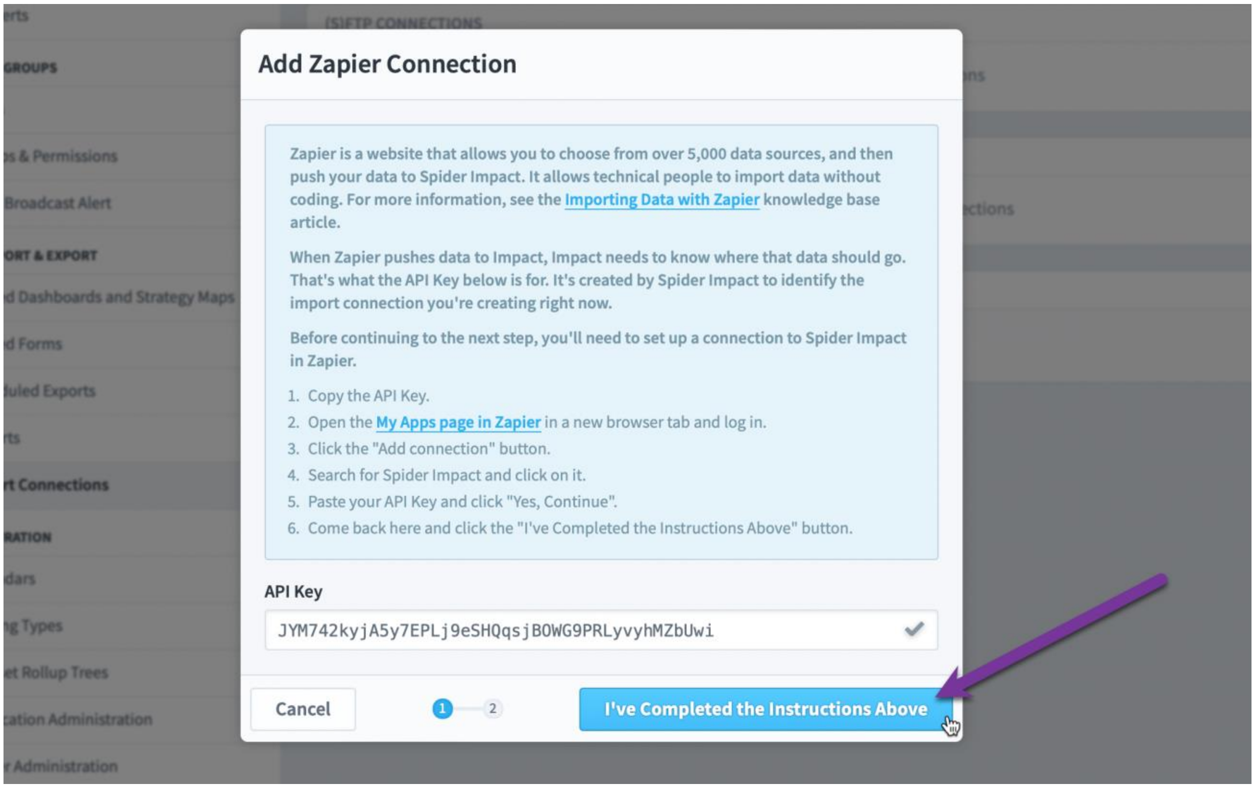
A new window will open. Paste the API Key that you copied from Spider Impact, and click “Yes, Continue”.



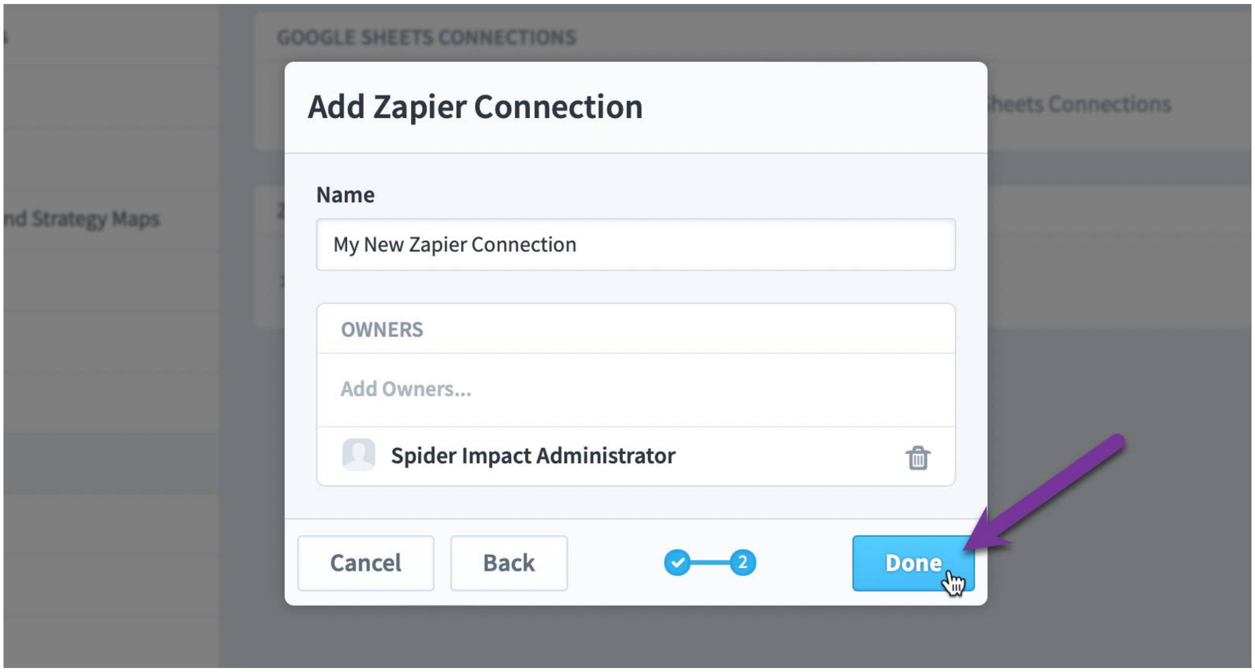
Zapier will show a "New connection added" success message, but unfortunately it's on the top of a "404: Page Not Found" message. Don't worry, everything is working correctly. We hope Zapier fixes this bug soon.



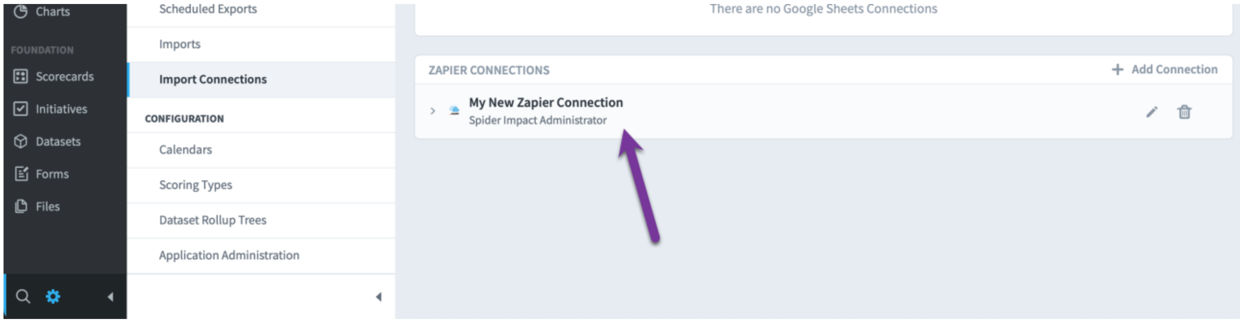
You've just created the Zapier half of the connection. Now it's time to go back to Impact and finish the other half. Click the "I've Completed the Instructions Above" button.



Finally, give your Zapier connection a name, assign it owners if you want, and click Done.



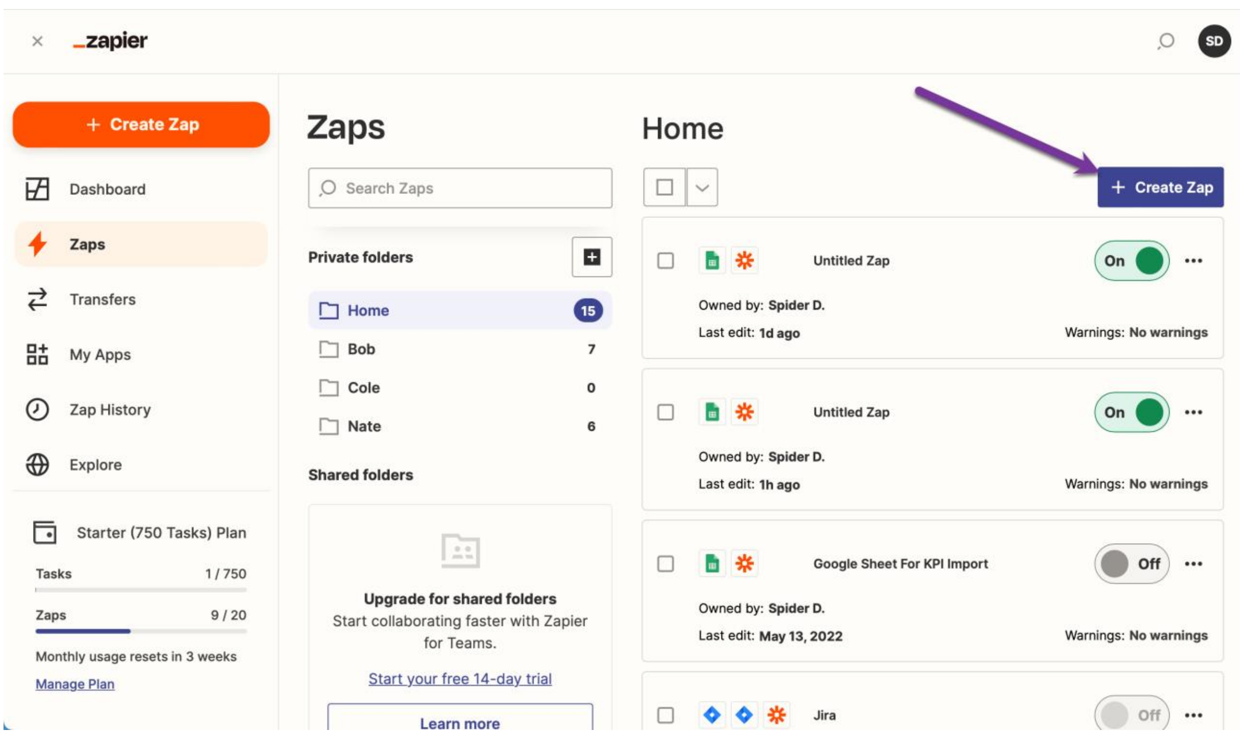
Your new Zapier connection is now shown on the Import Connections screen.



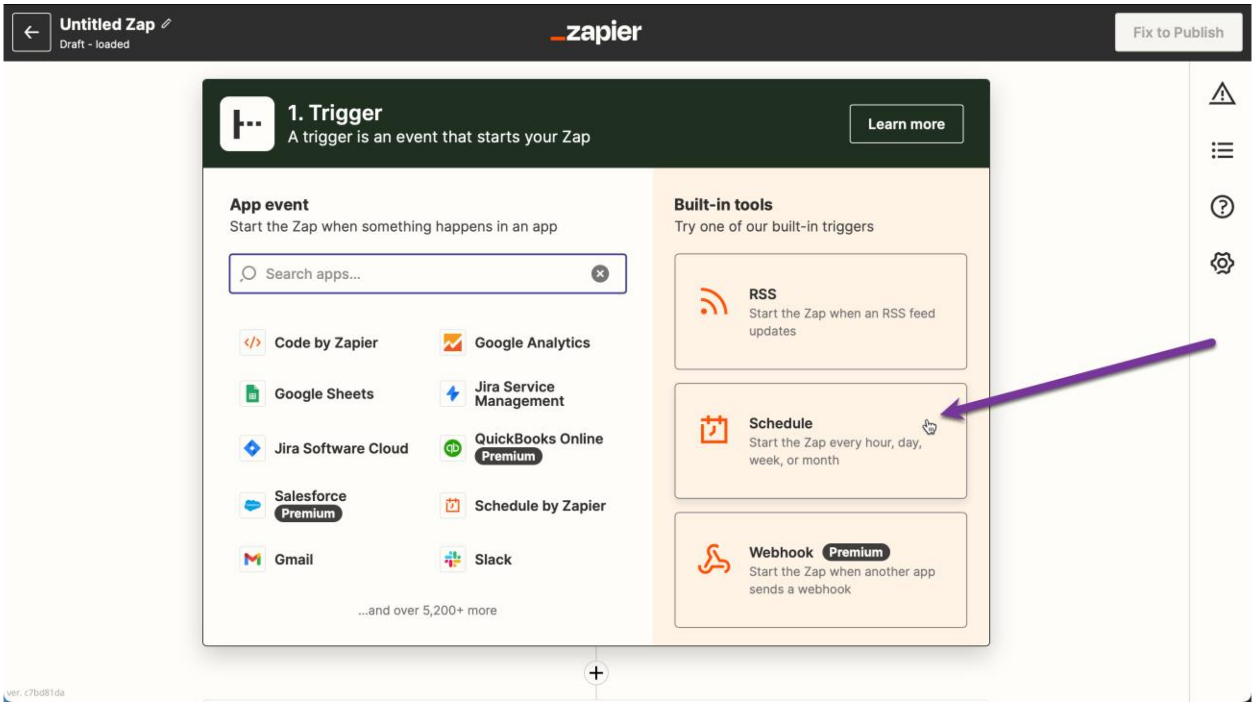
Creating a Zap

Now that both ends of the data connection have been set up, Spider Impact will start catching any data that Zapier sends it. It's not a problem that Impact doesn't know what to do with the data yet. It's just going to happily collect data from Zapier until you create an import to use it.

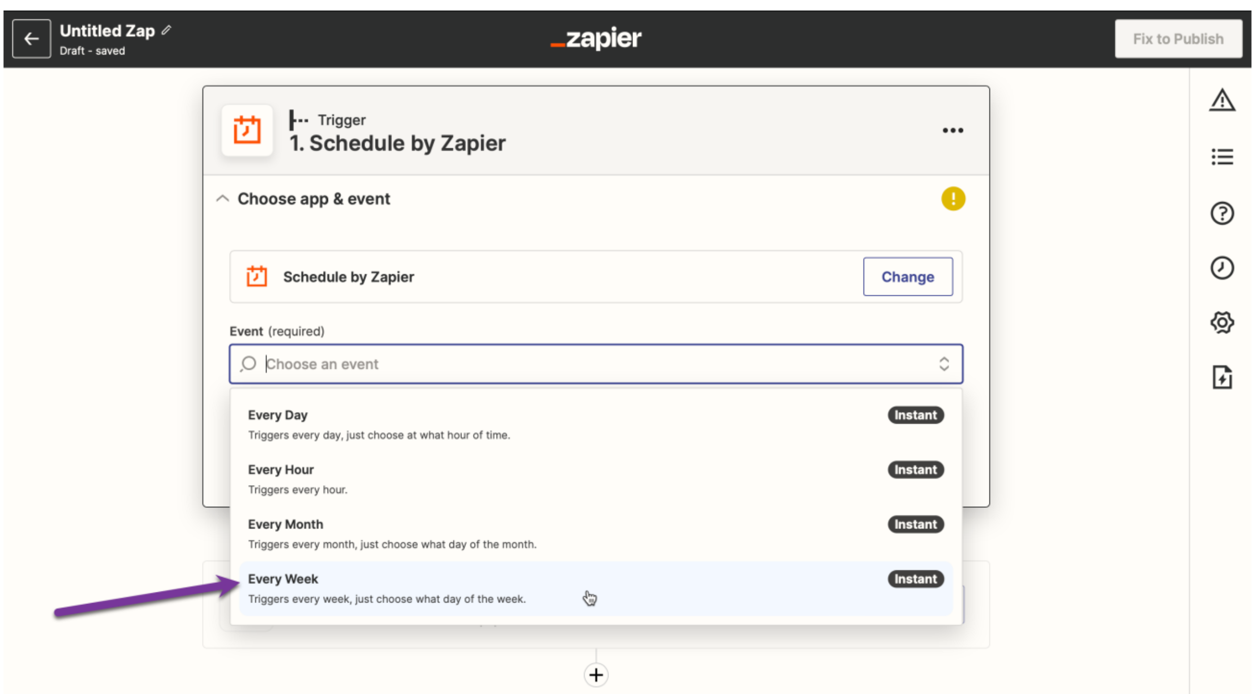
So, the next step is to create a Zap in Zapier that sends data to Impact. To do this we'll open the Zaps page in Zapier and click the "Create Zap" button. https://zapier.com/app/zaps



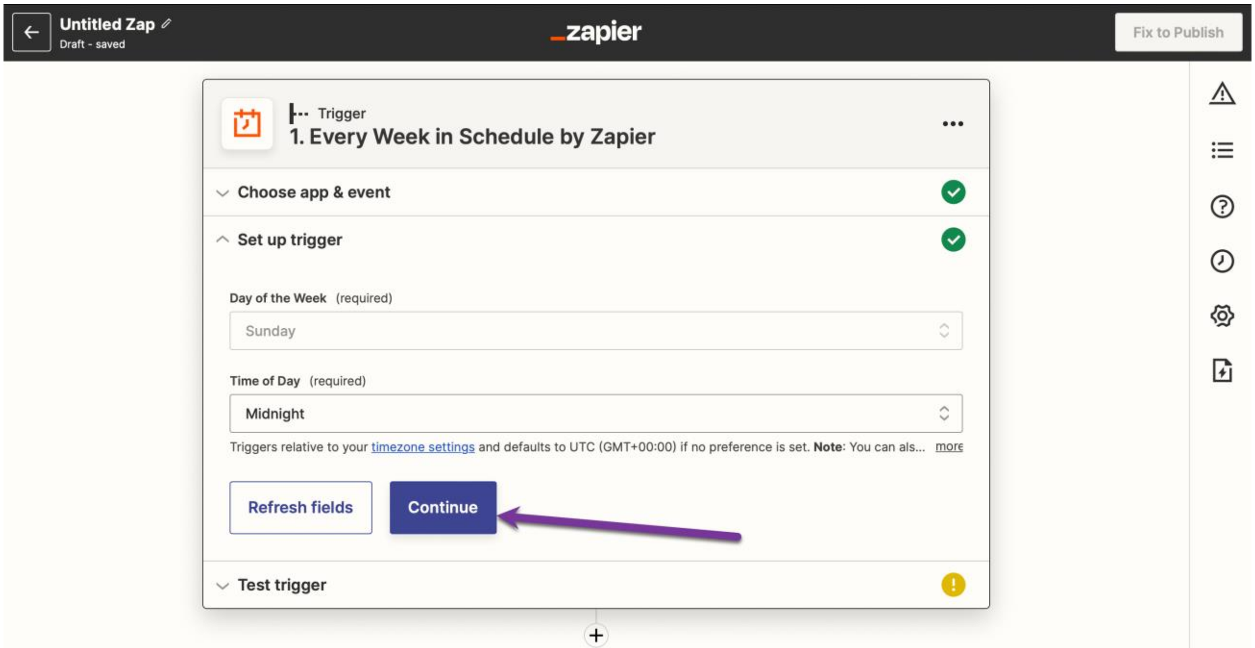
The first part of setting up a new Zap is choosing its trigger. This is the event that is going to start the process of sending data to Spider Impact. It could be when something happens in an app, like a new issue being created in a support ticket system. Or it could be a built-in tool like when a webhook fires. In this example we're going to choose for the trigger to happen on a schedule.



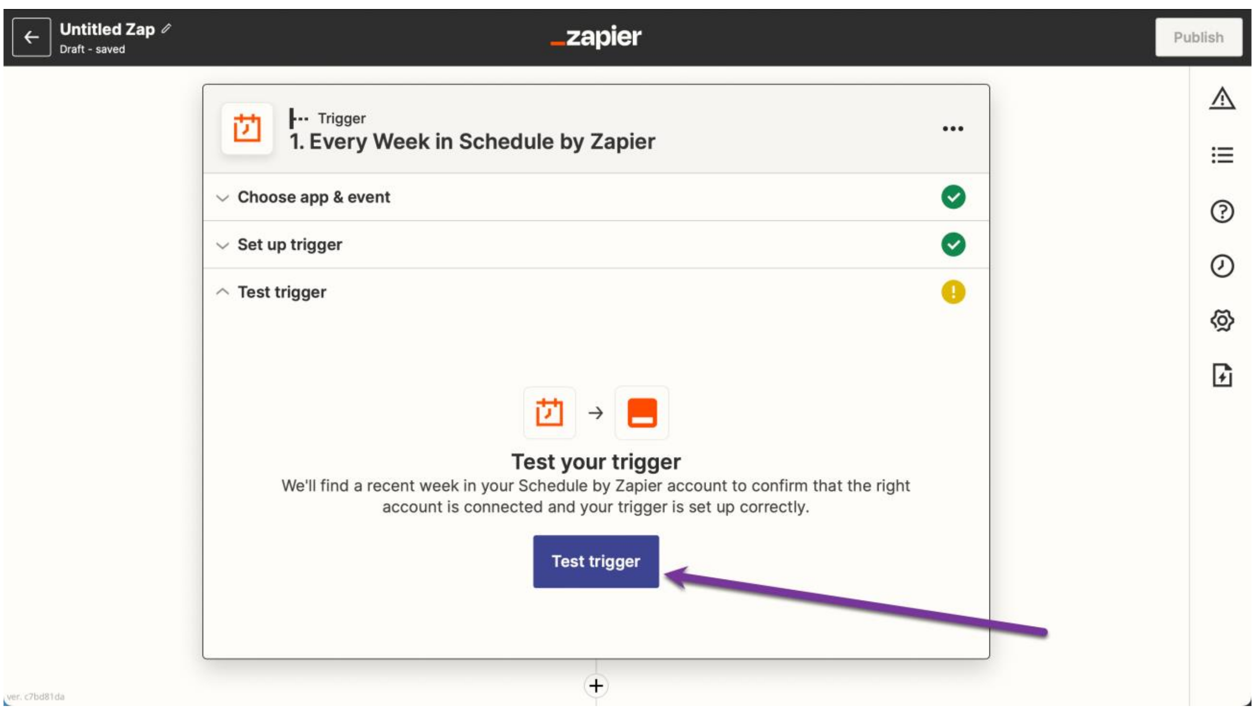
We'll choose to run our Zap every week...



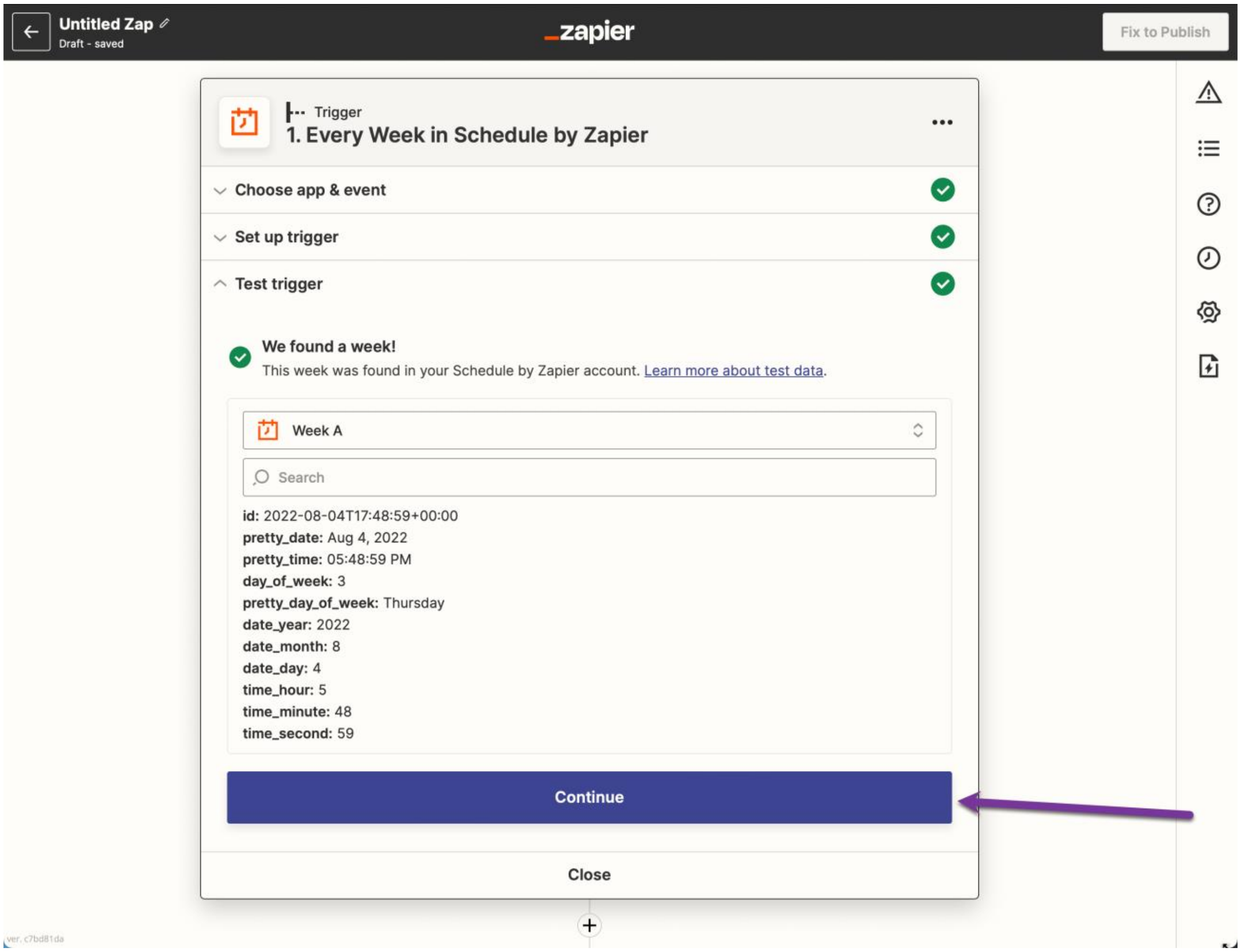
... on Sunday at midnight.



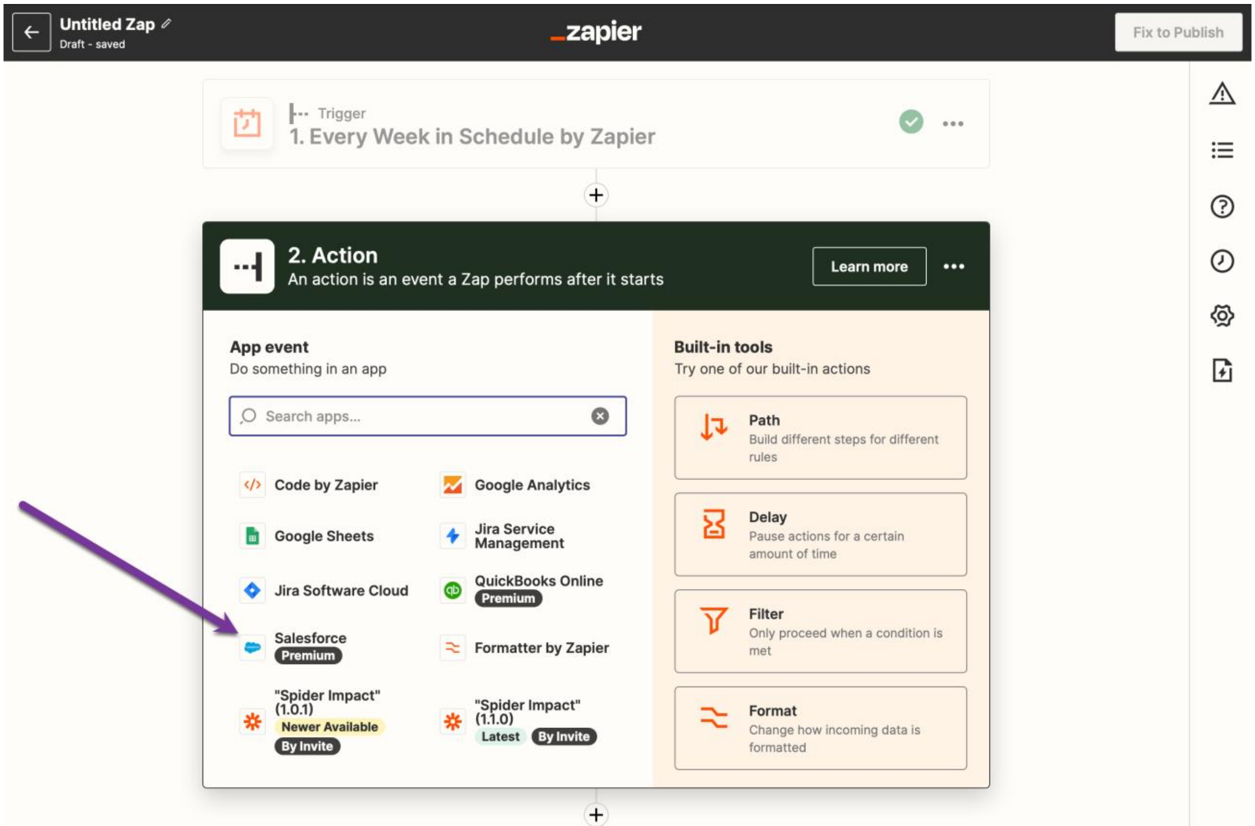
We'll now test the trigger...



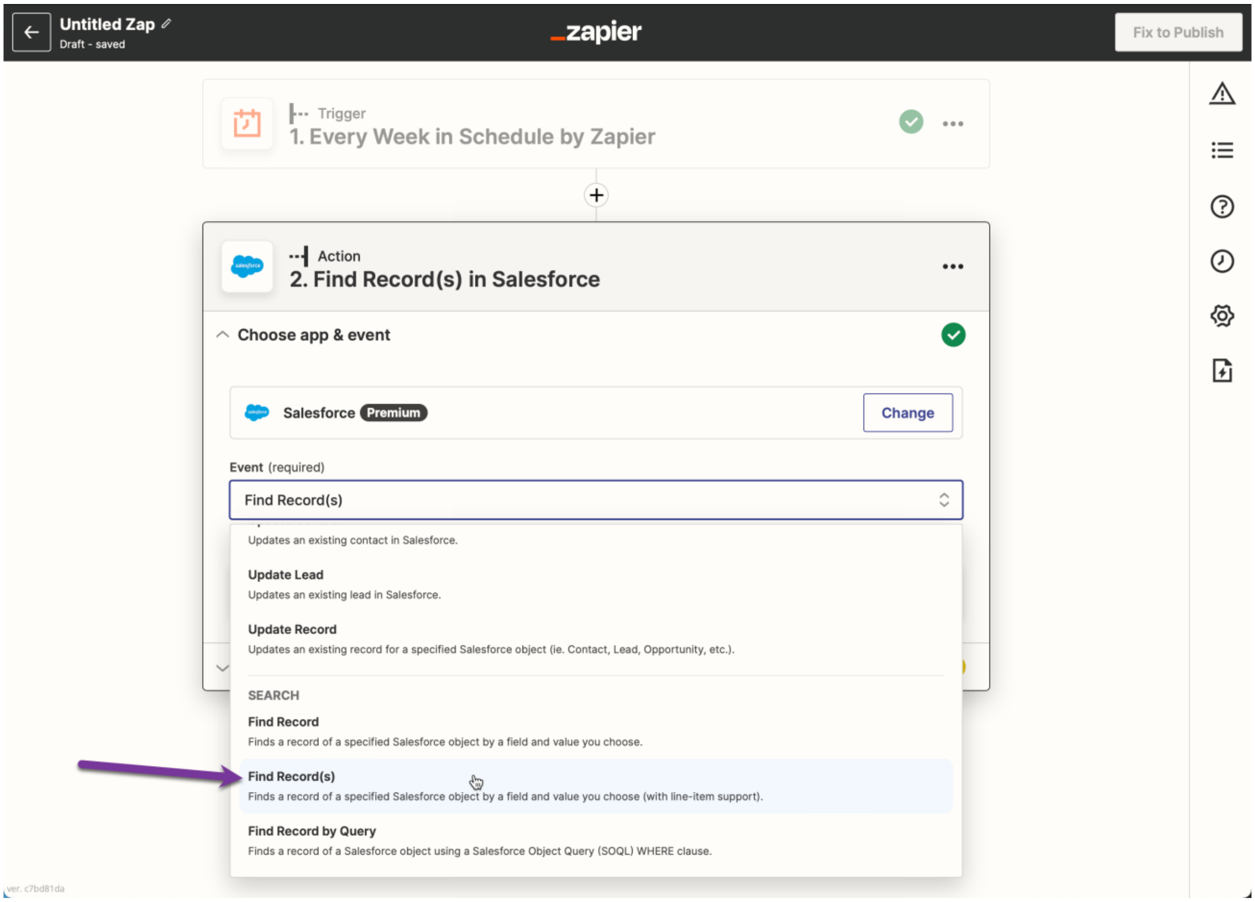
... and it works.



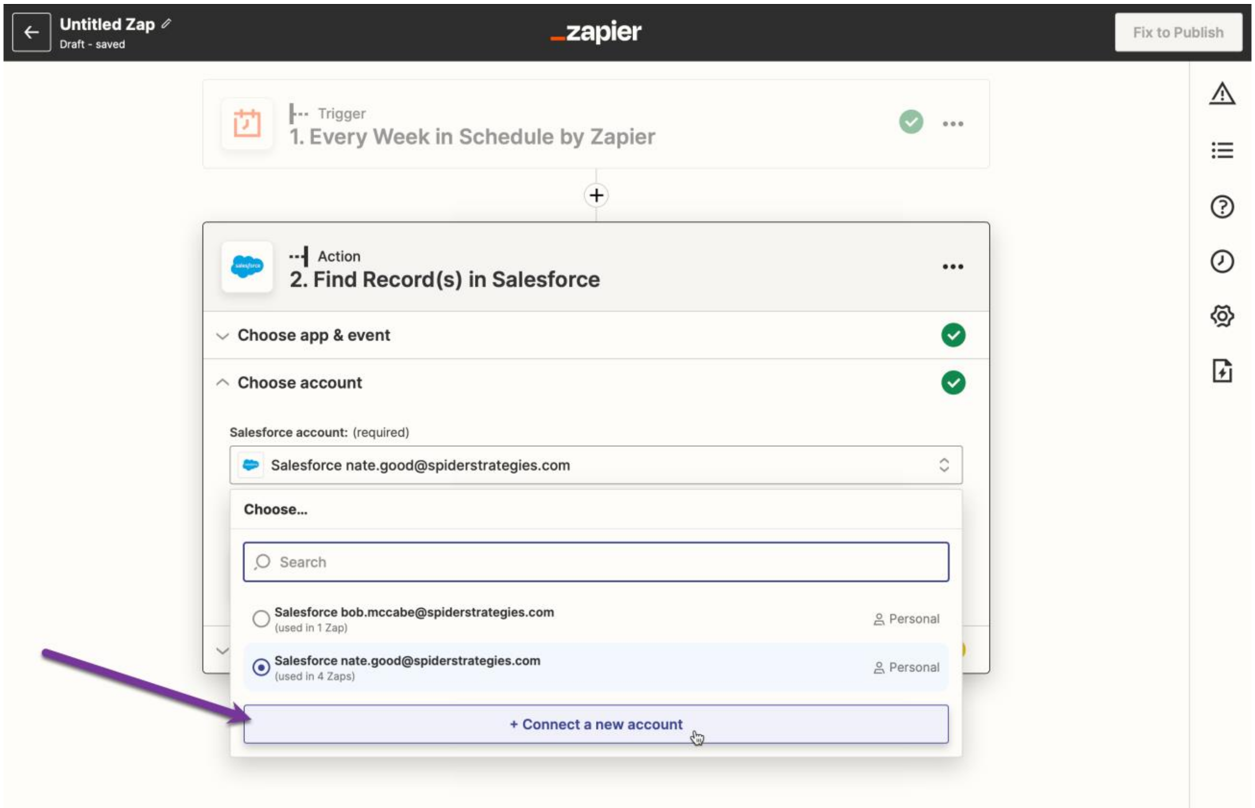
When we click Continue, we move on to the next step in the Zap setup process, choosing the Action. There are literally thousands of things you can do for an action, but you're going to often want to choose to get data from an app. In this example we'll choose Salesforce.



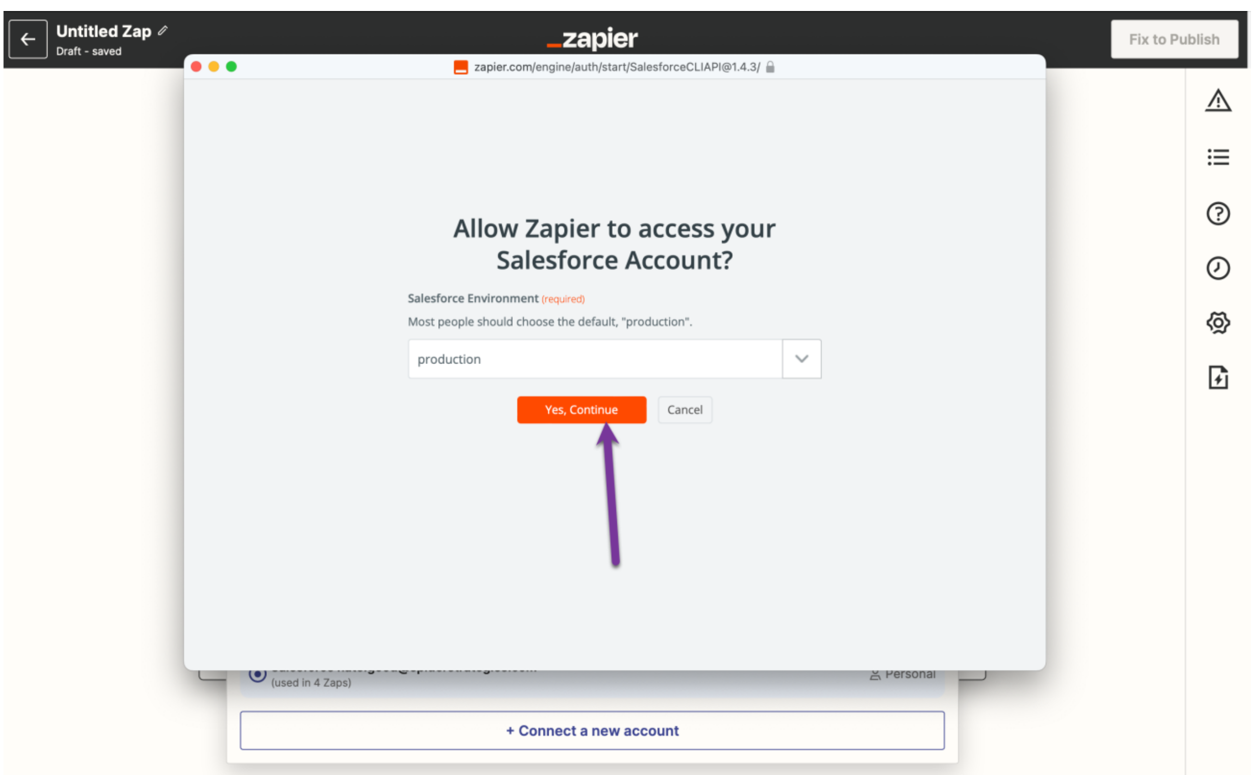
There is a list of Events that Salesforce allows us to choose from, and these options are different for every app. We'll choose "Find Record(s)" because we want to get records out of Salesforce.



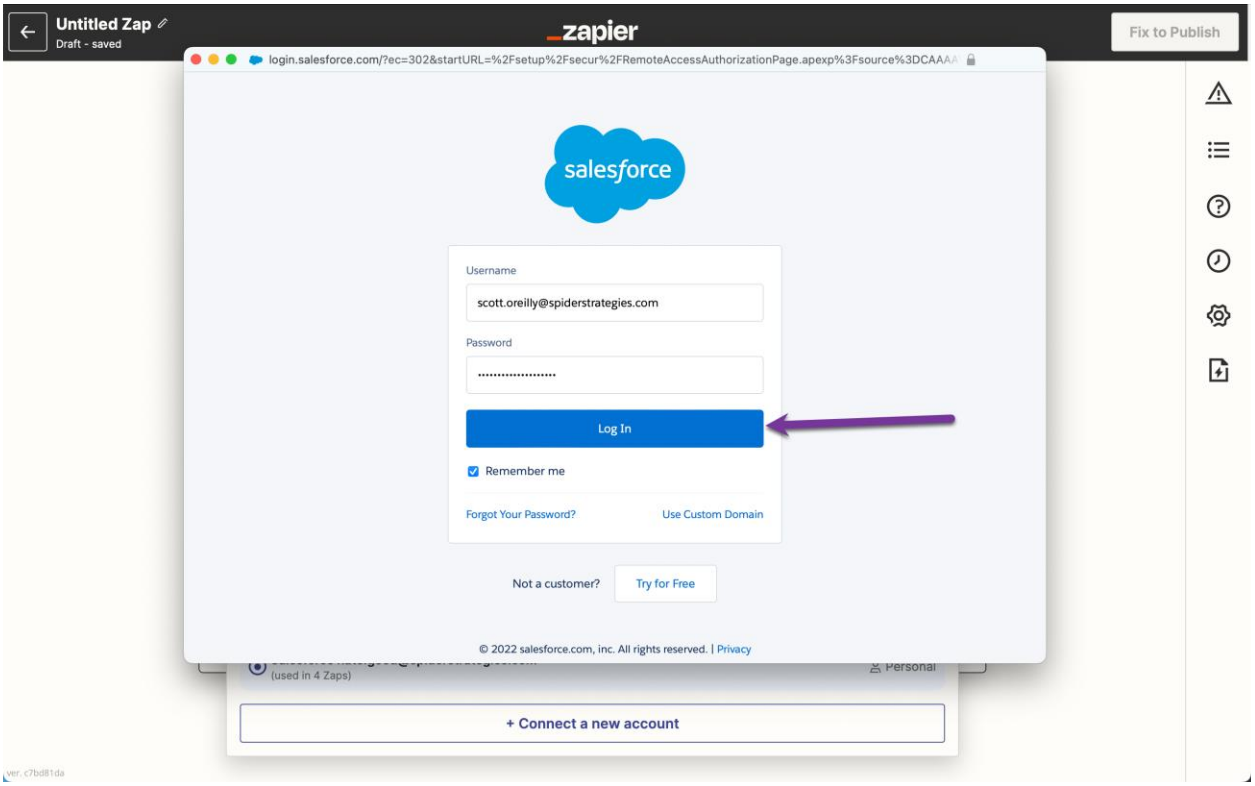
Next, we need to authenticate with Salesforce. We'll choose "Connect a new account".



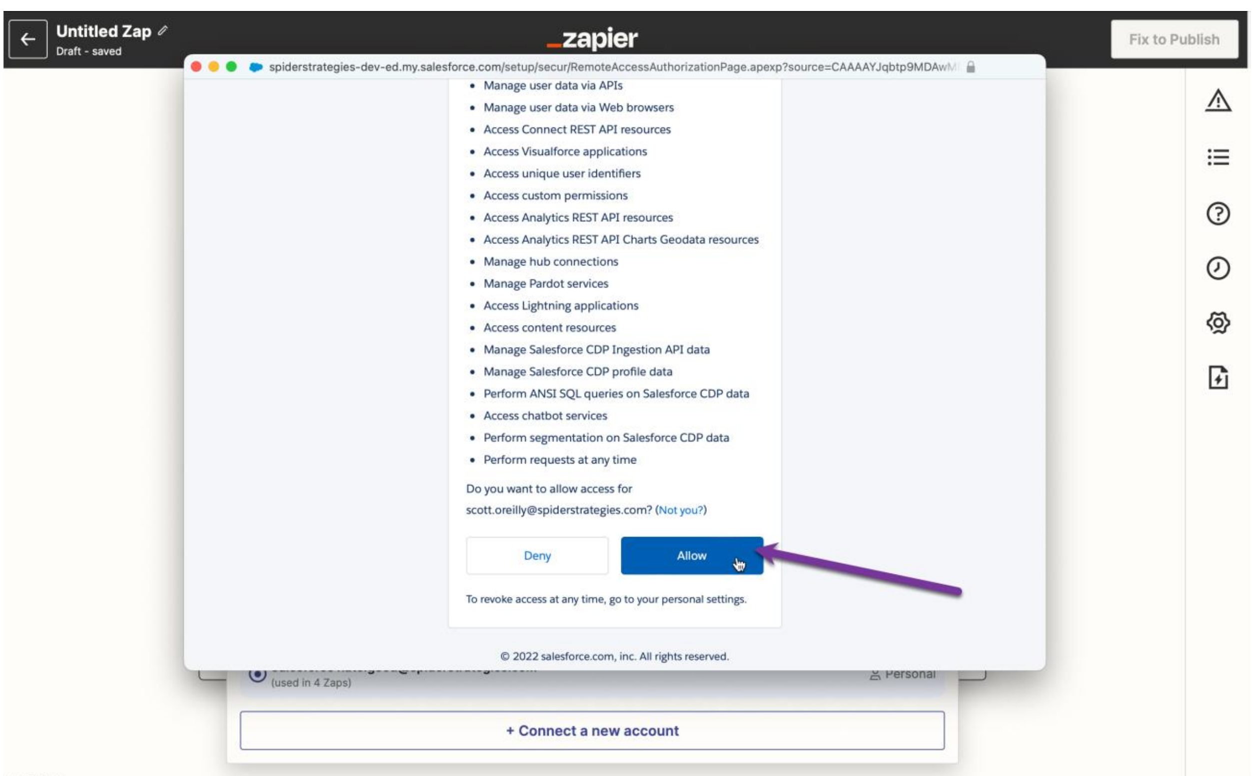
This opens a new window to connect to Salesforce. We'll choose our "production" Salesforce environment, and click "Yes, Continue".



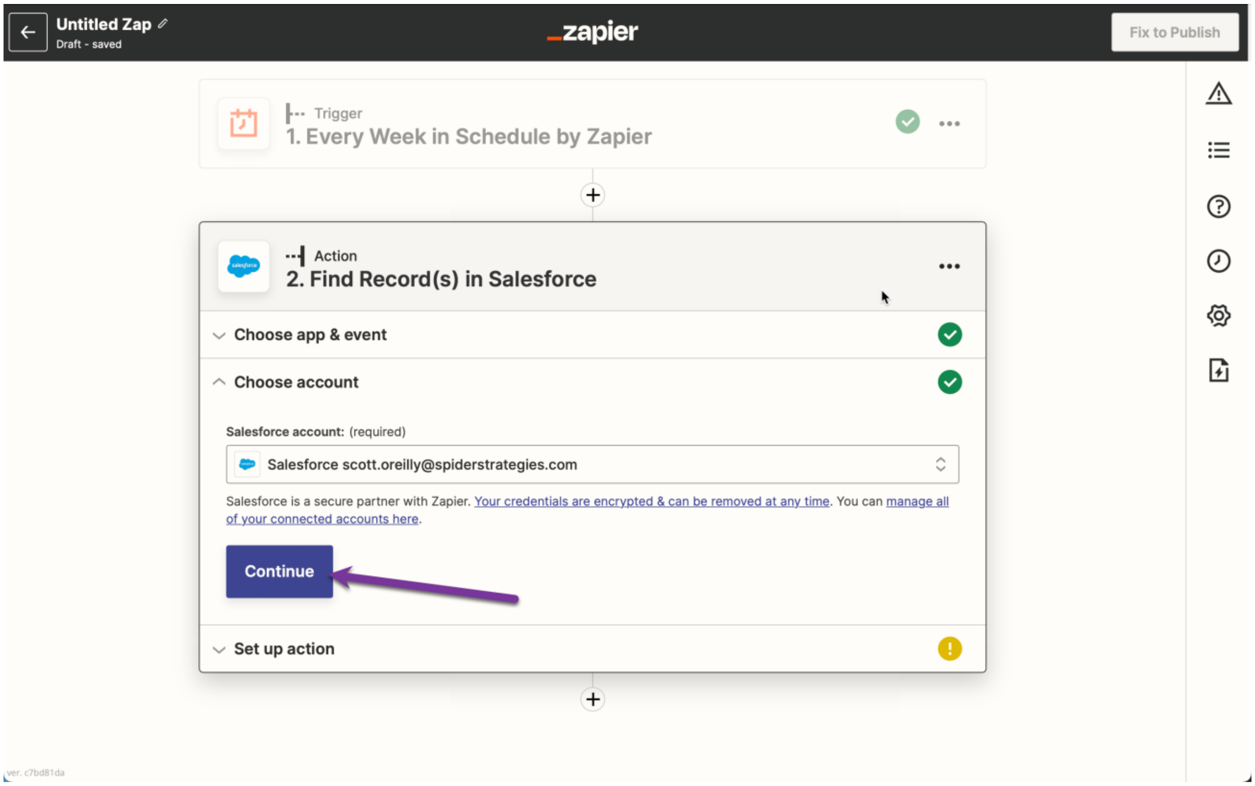
We'll log in with our Salesforce credentials...



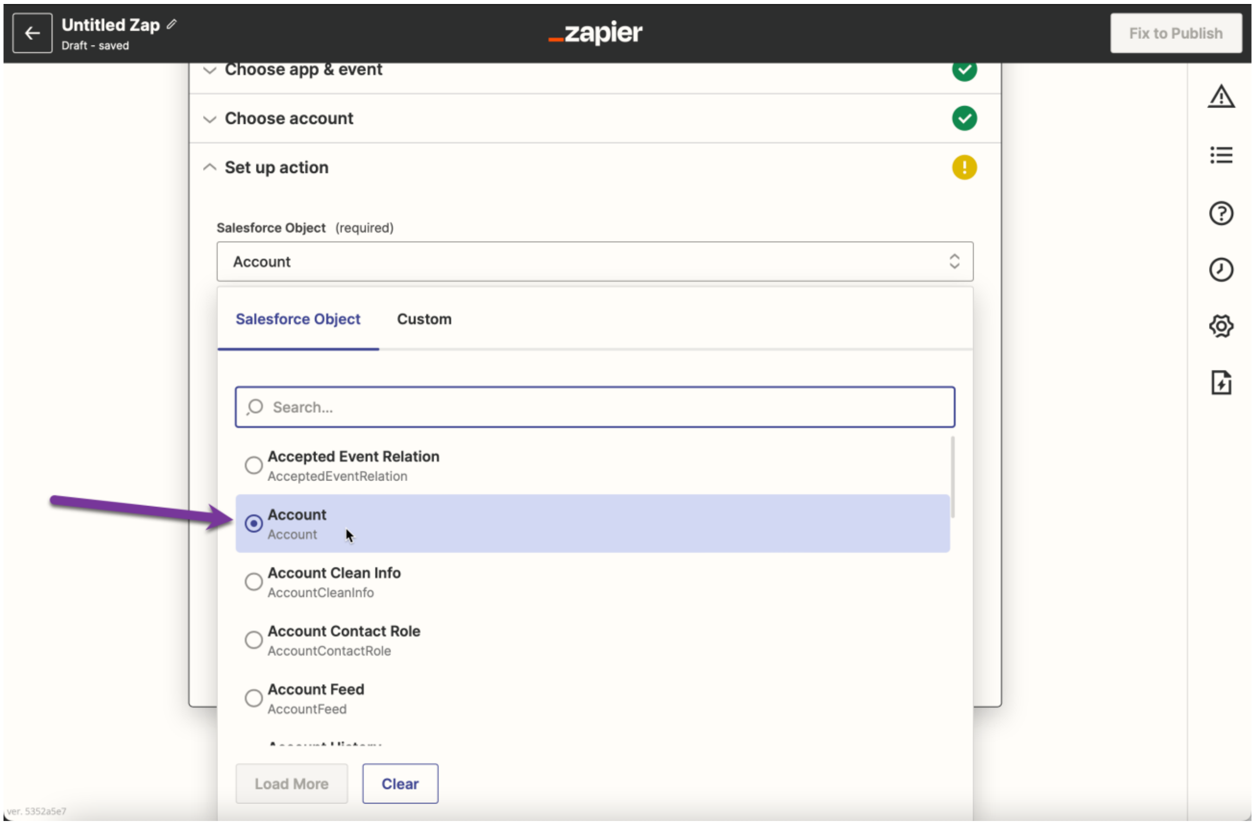
... and we'll give Zapier permission to access our data.



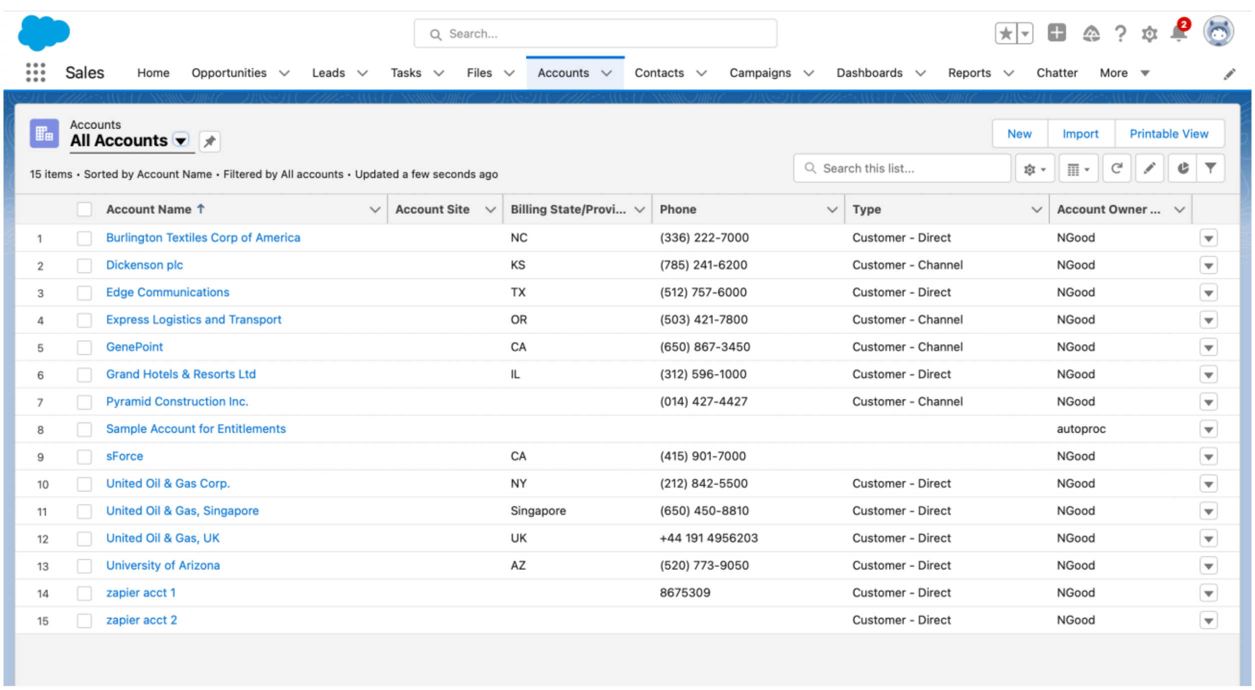
The Salesforce connection window closes, and we'll click Continue.



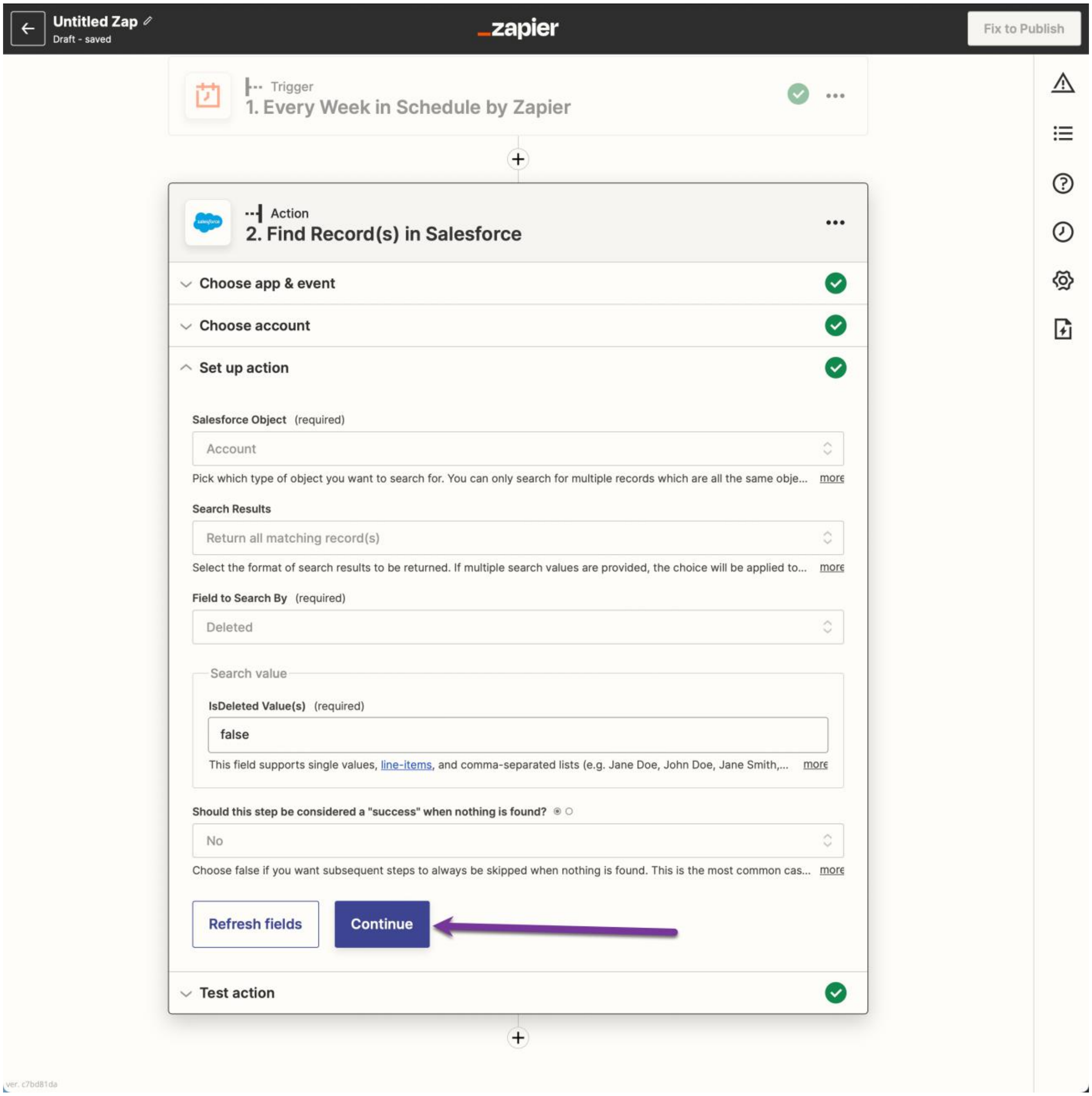
Now we need to set up the Find Record(s) action. Again, this step will be different for every app. We'll need to choose which kind of Salesforce objects that we're looking for. We'll choose to get "Account" objects, which are like customer records in Salesforce.



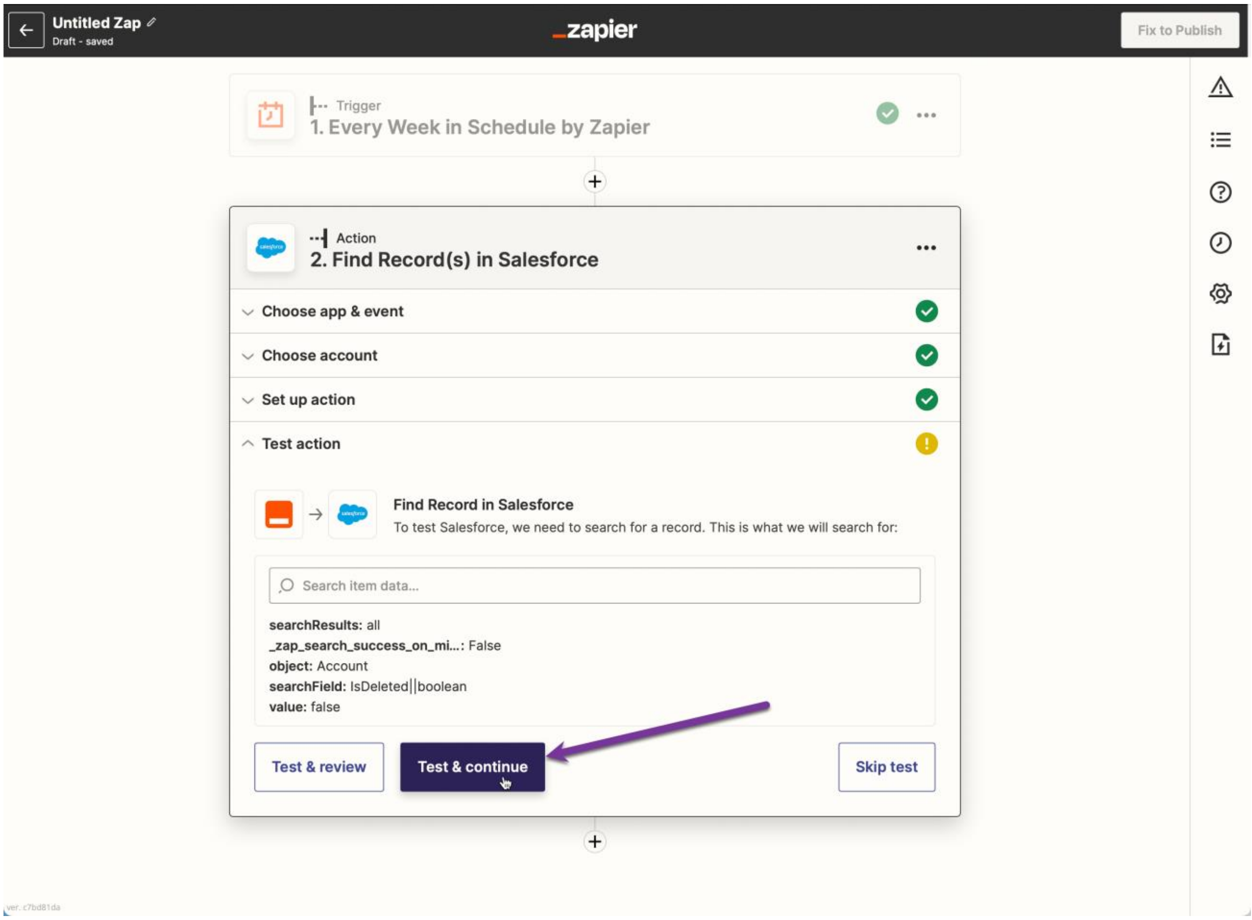
For reference, this is what our list of accounts looks like in Salesforce. This is just an example database, so there are only 15 accounts.



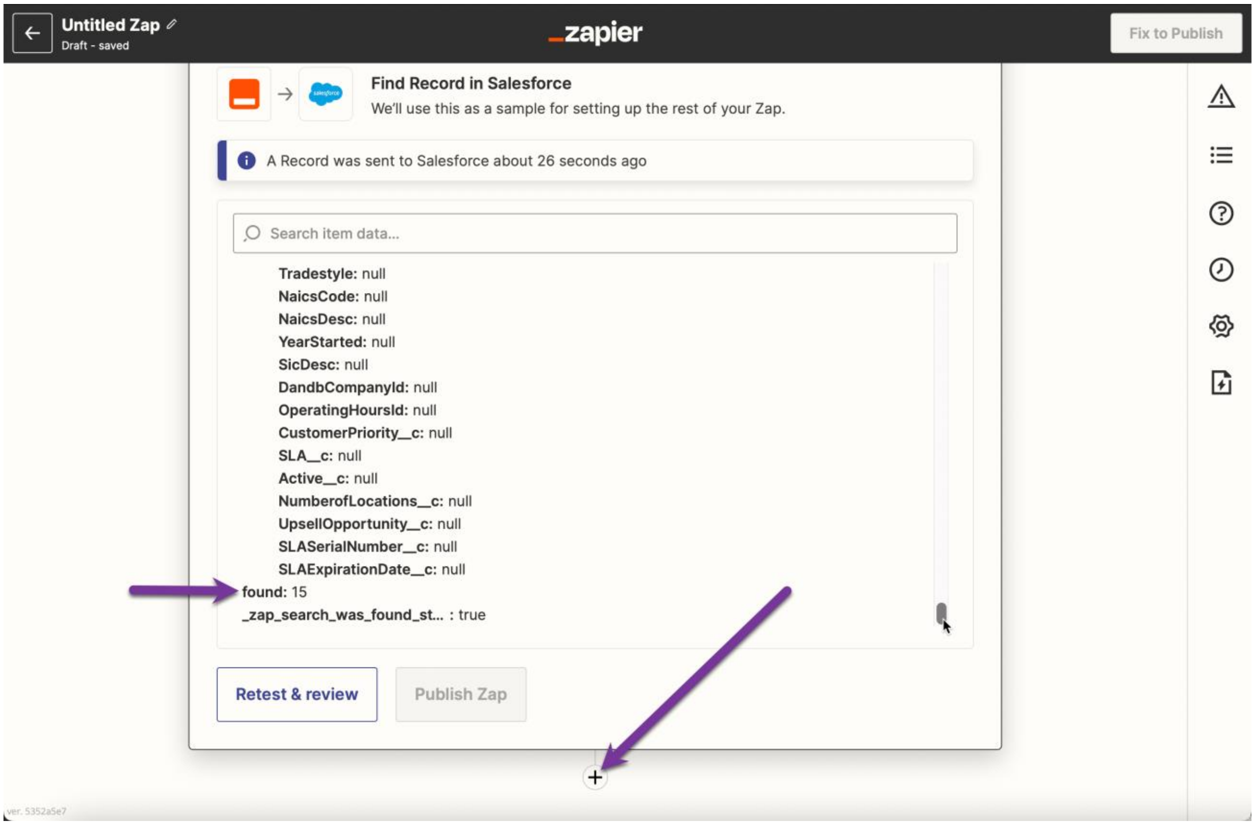
Back in Zapier we'll continue setting up the action. For the search, we'll get all accounts where "Deleted" is false, meaning all active accounts.



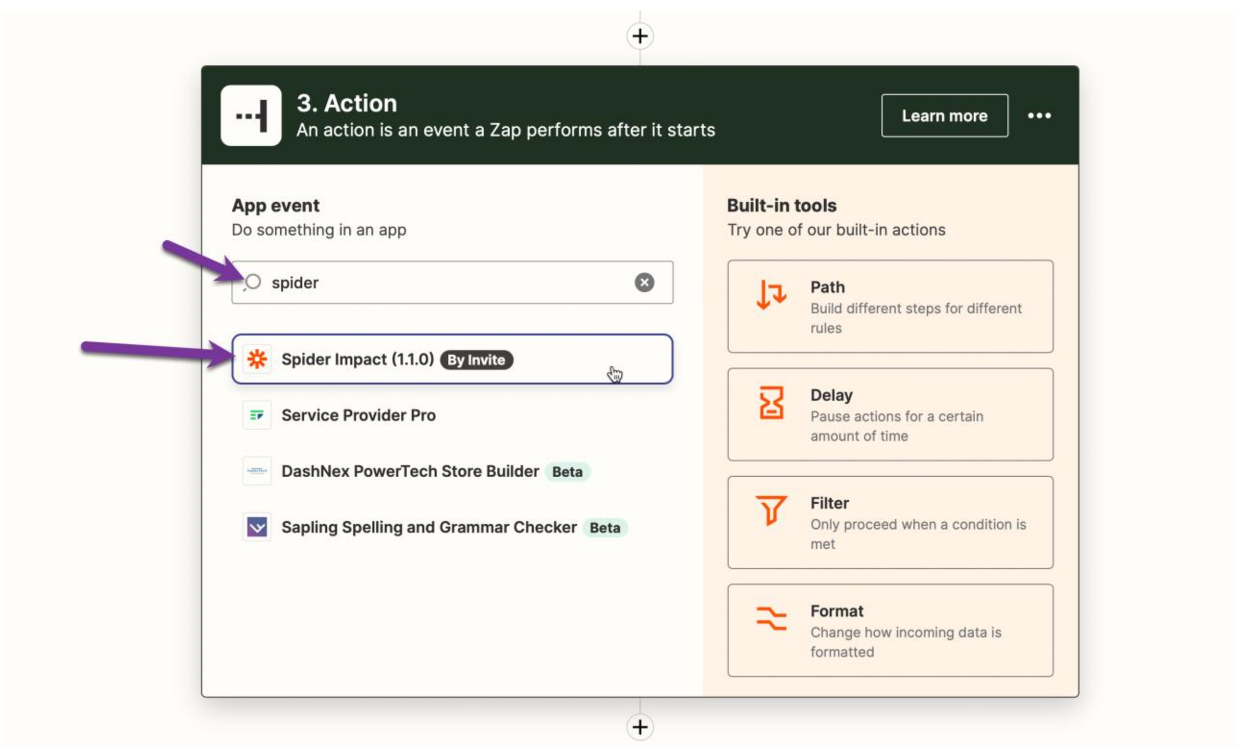
We'll click "Test & continue". We don't want to skip the test because then we'd have to wait until the Zap fires naturally on Sunday night to pull the data into Spider Impact.



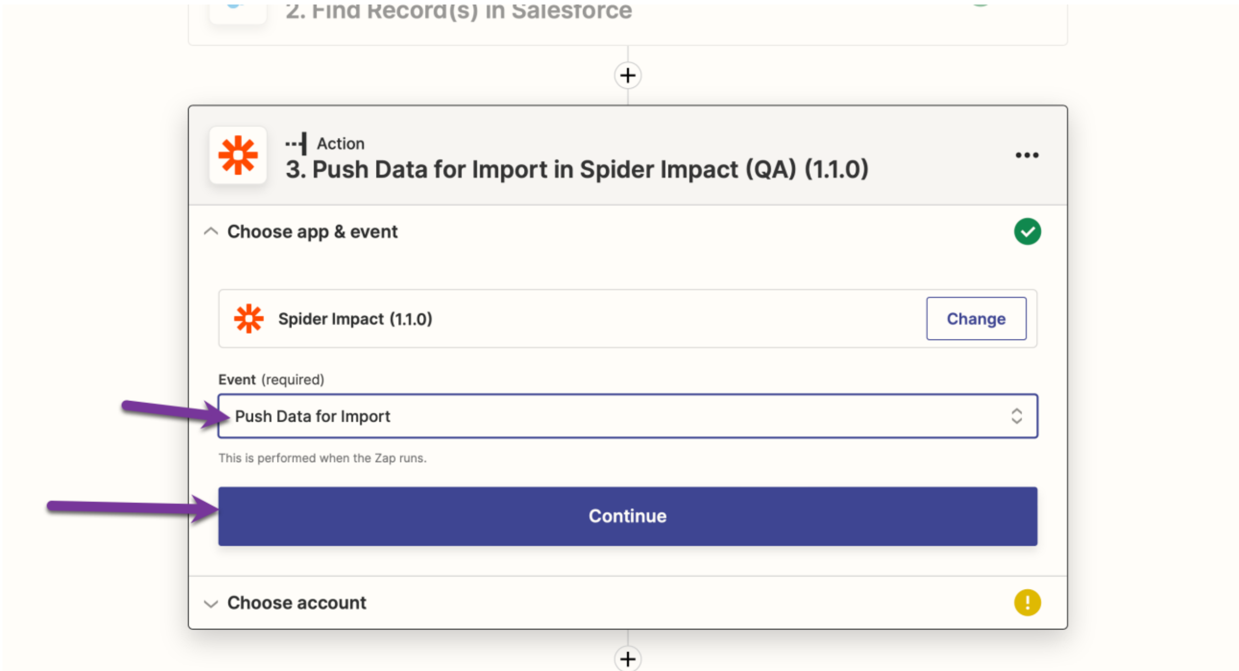
In the records panel we can see 15 results, which matches the number of accounts we have in our test Salesforce database. Now we need somewhere to send this data, so we'll click the "+" button to add a second action in our Zap's chain. This isn't super intuitive, and we hope Zapier improves this process.



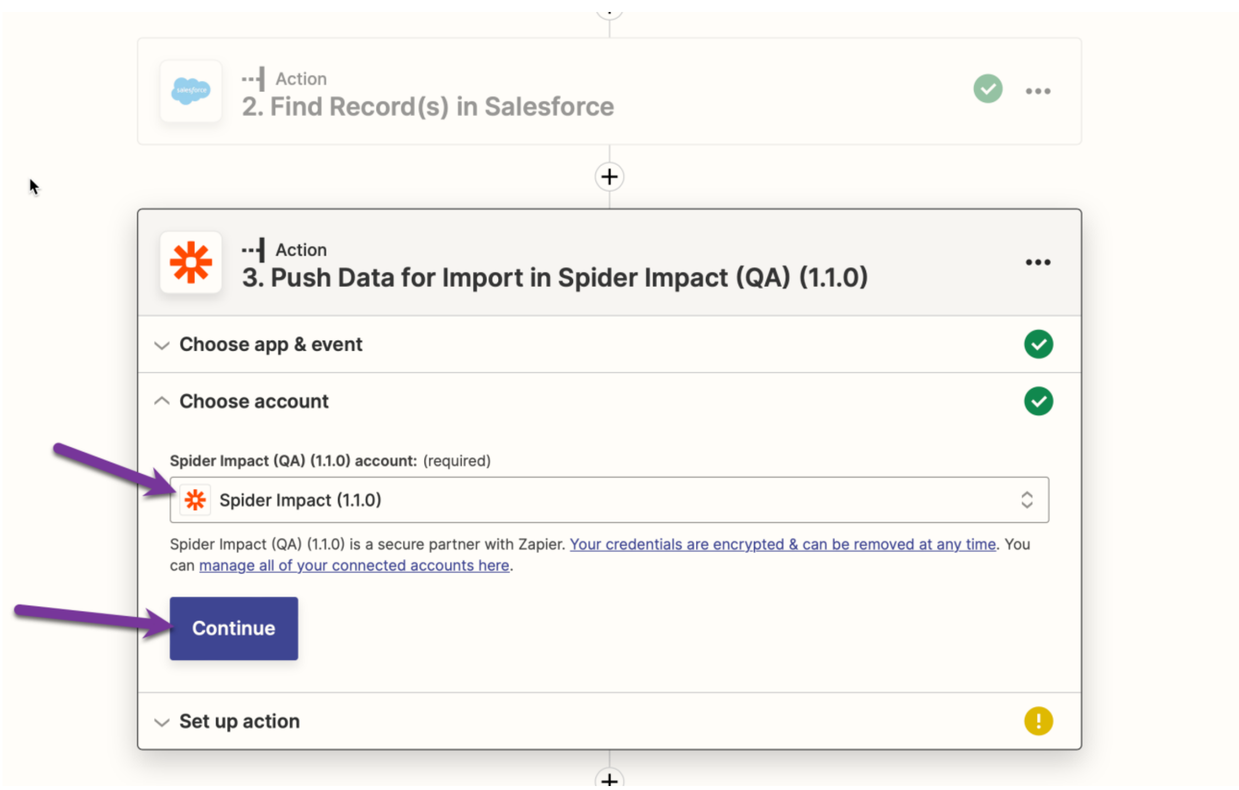
This time we'll choose Spider Impact under App event. You may need to search for it.



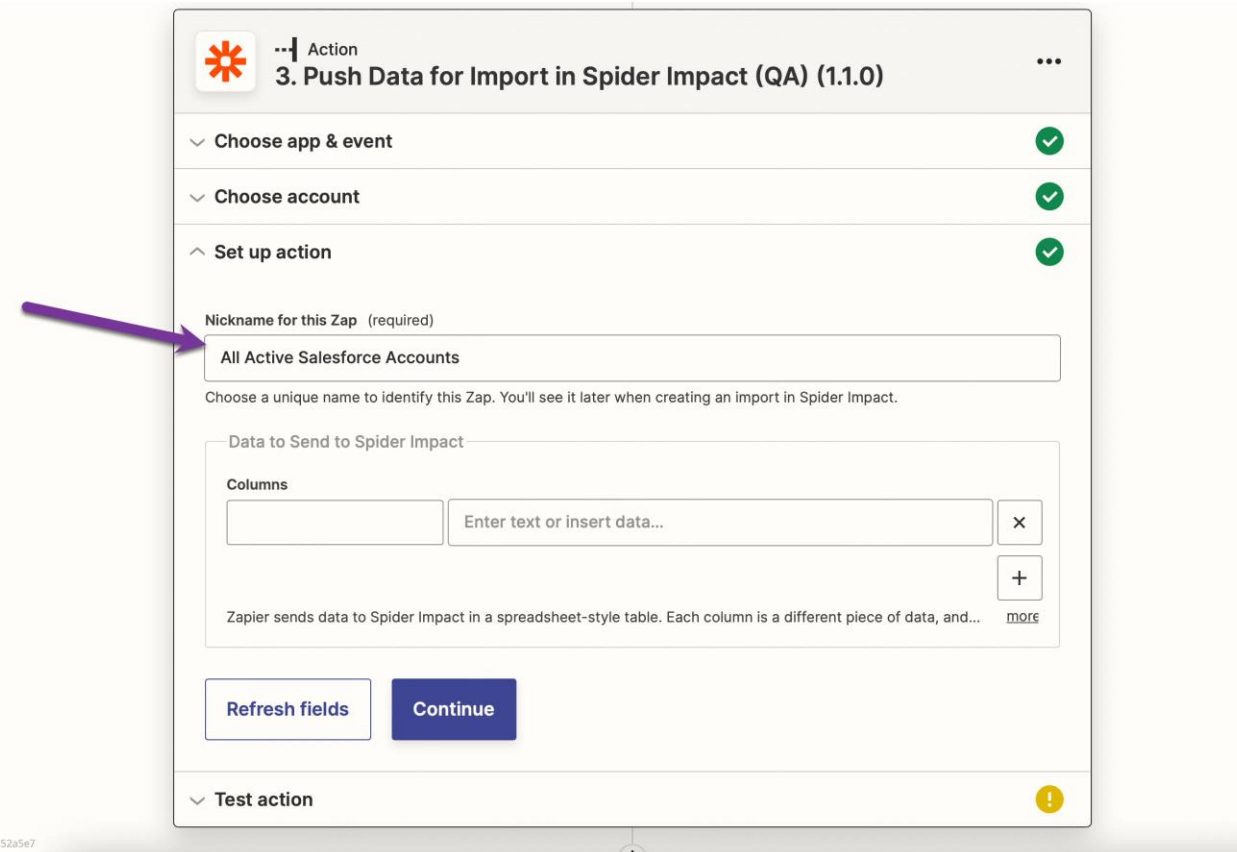
We'll choose "Push Data for Import" for the event, and we'll click Continue.



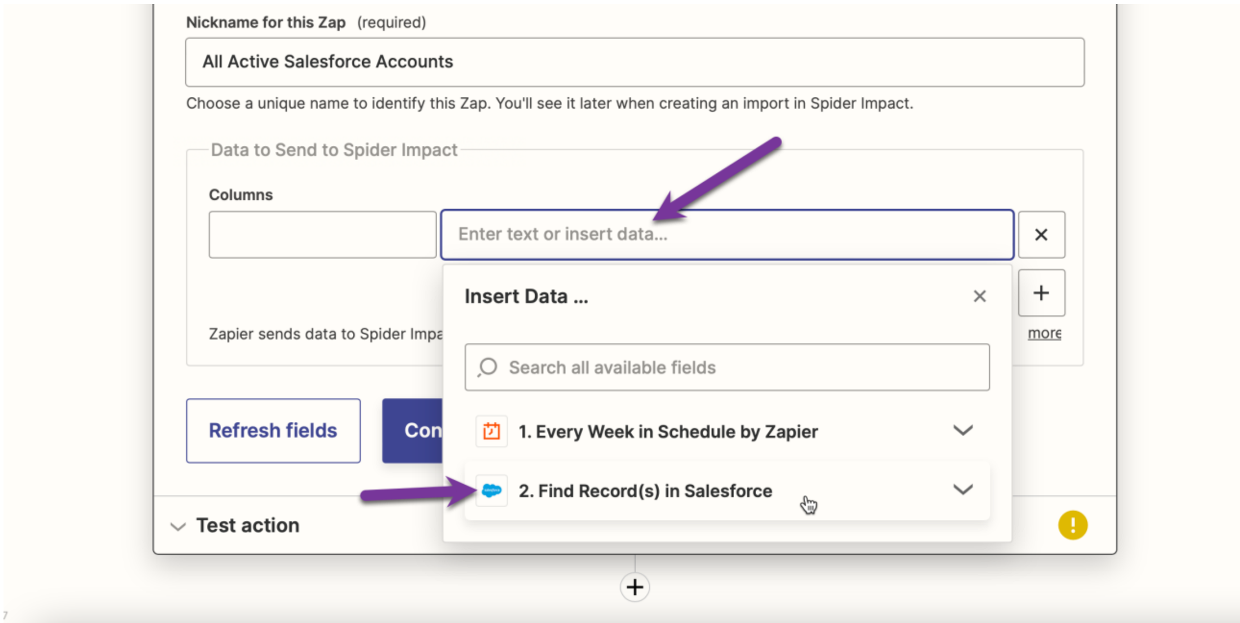
Then we'll choose the connection we set up earlier and click Continue.



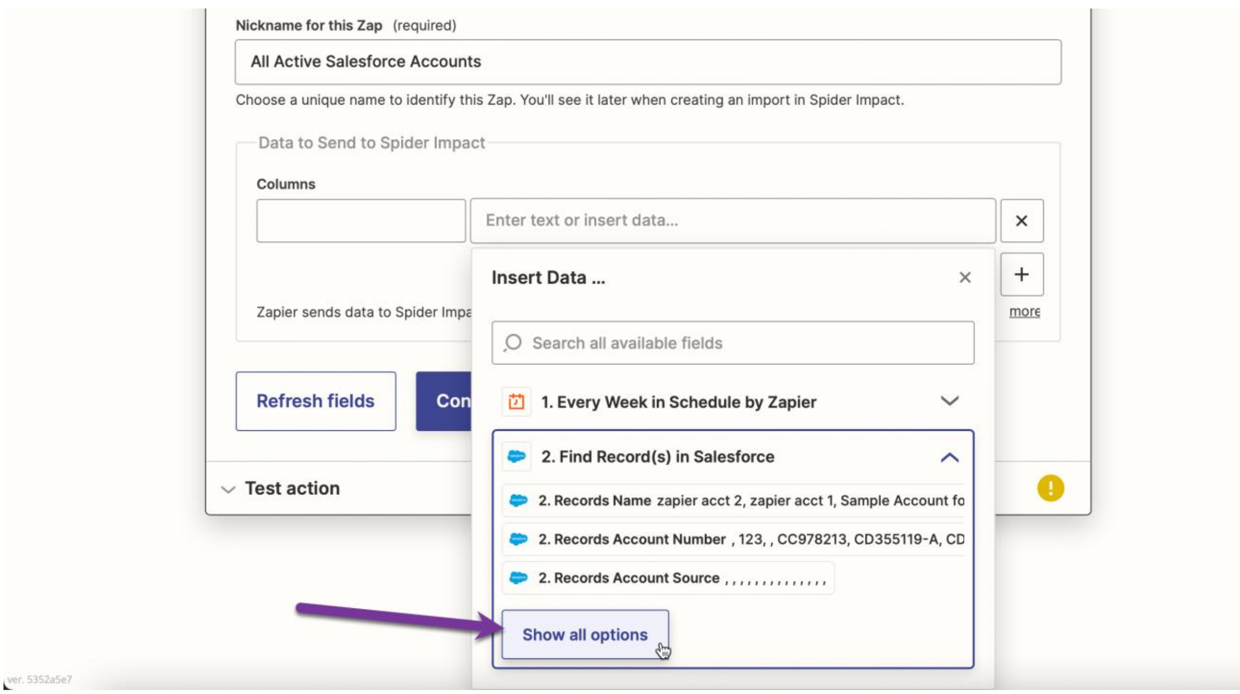
Now we need to choose a unique Nickname for this Zap that we're creating. Later, when we're creating a Zapier data import in Spider Impact, we'll need to choose which Zap we want to get data from. This Nickname is how we'll identify our Zap.



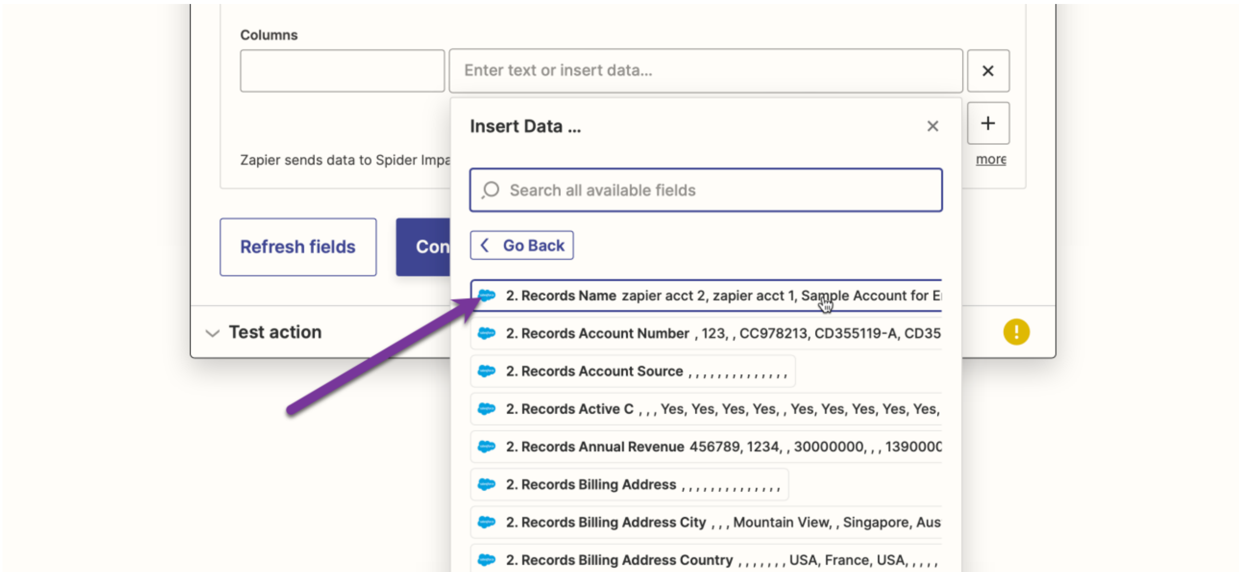
The next step is choosing which columns we want from Salesforce. These are the fields that are going to be made available to Spider Impact. We have two options at first, data from our schedule (like the date the import runs), or data from Salesforce. We'll choose Salesforce.



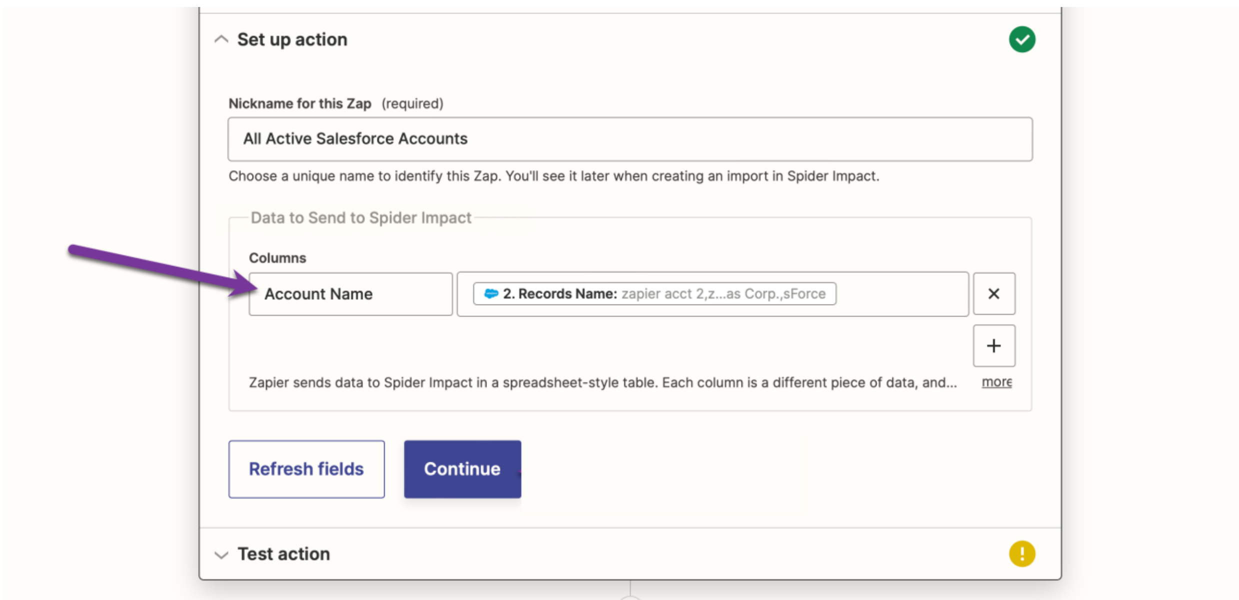
Zapier suggests some data we may want, but we'll click "Show all options".



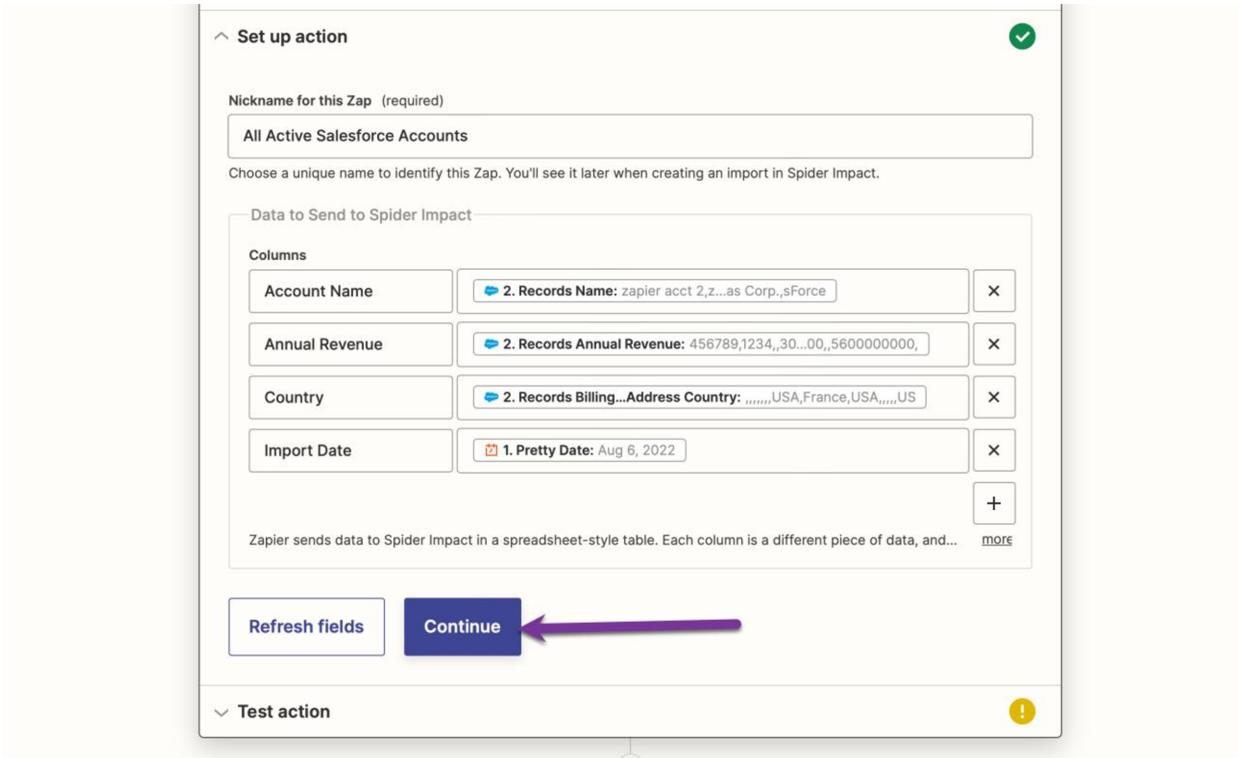
This lists all the columns available to us. First, we'll choose the account's name.



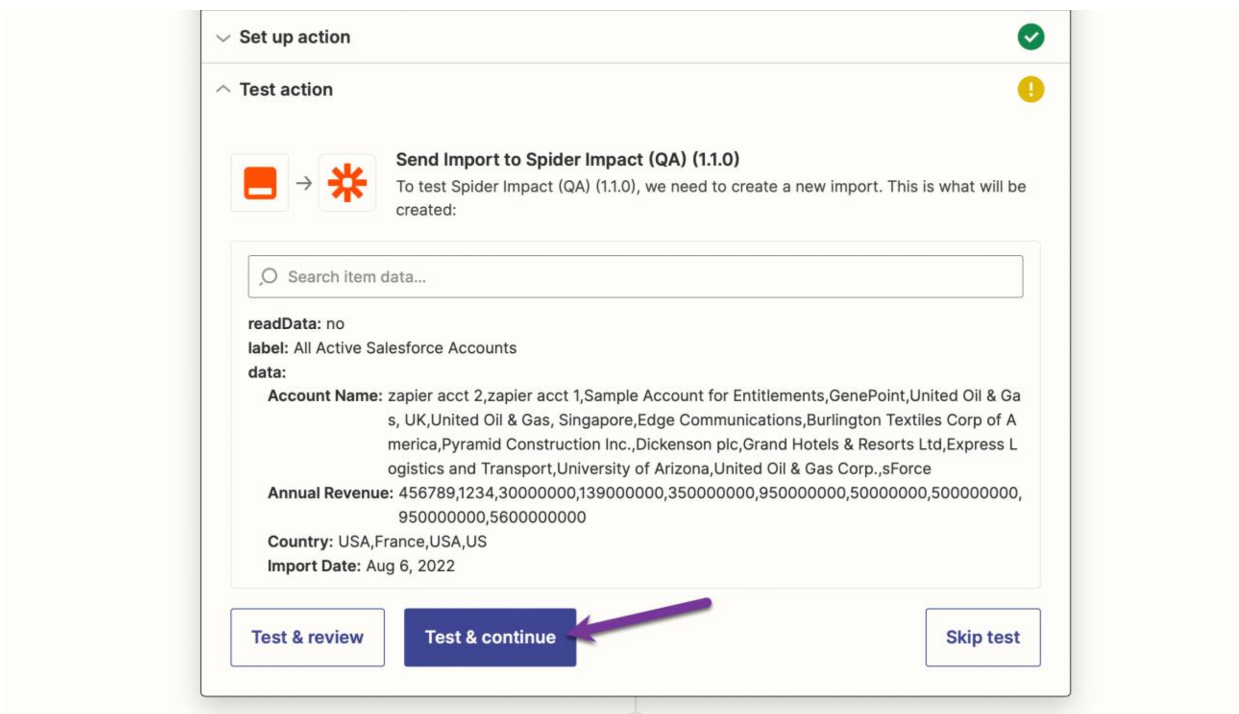
And on the left we'll type "Account Name" to identify the column for Spider Impact.



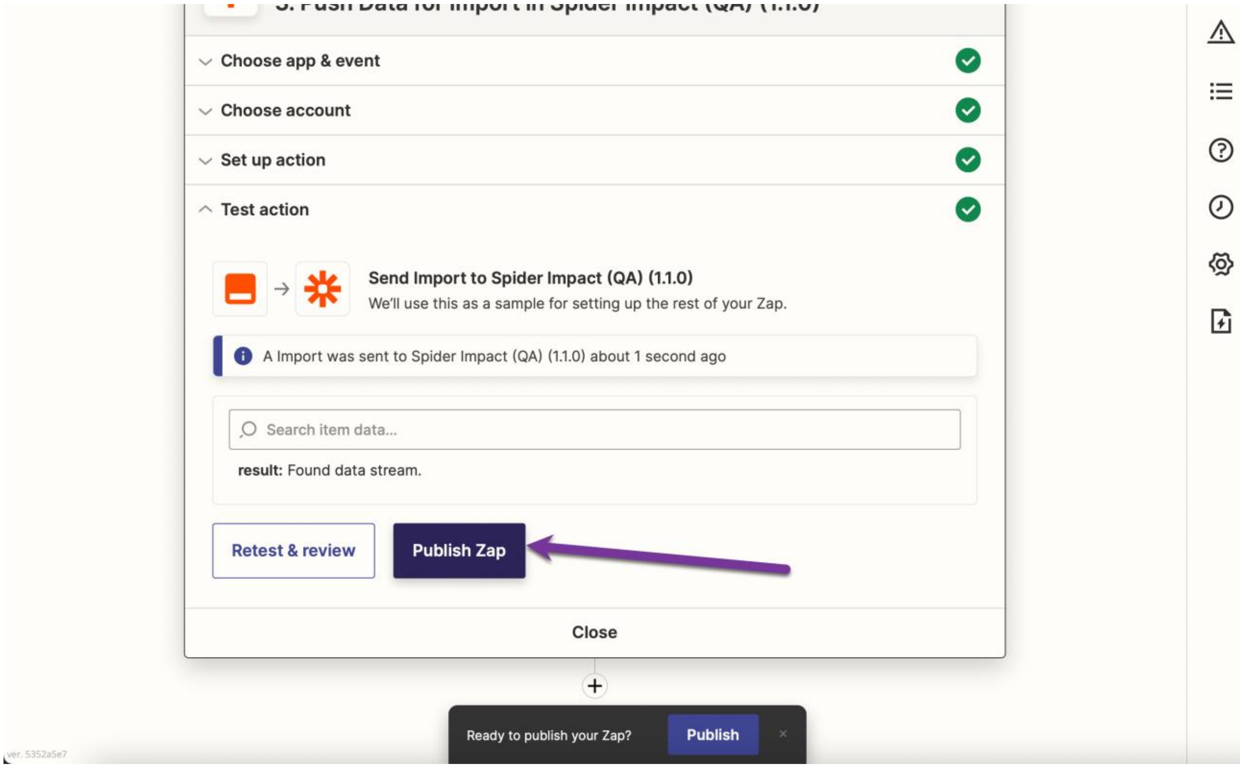
We'll do the same thing for the "Annual Revenue" and "Country" columns from Salesforce. We'll also add an "Import Date" column from the schedule. Then we'll click Continue.



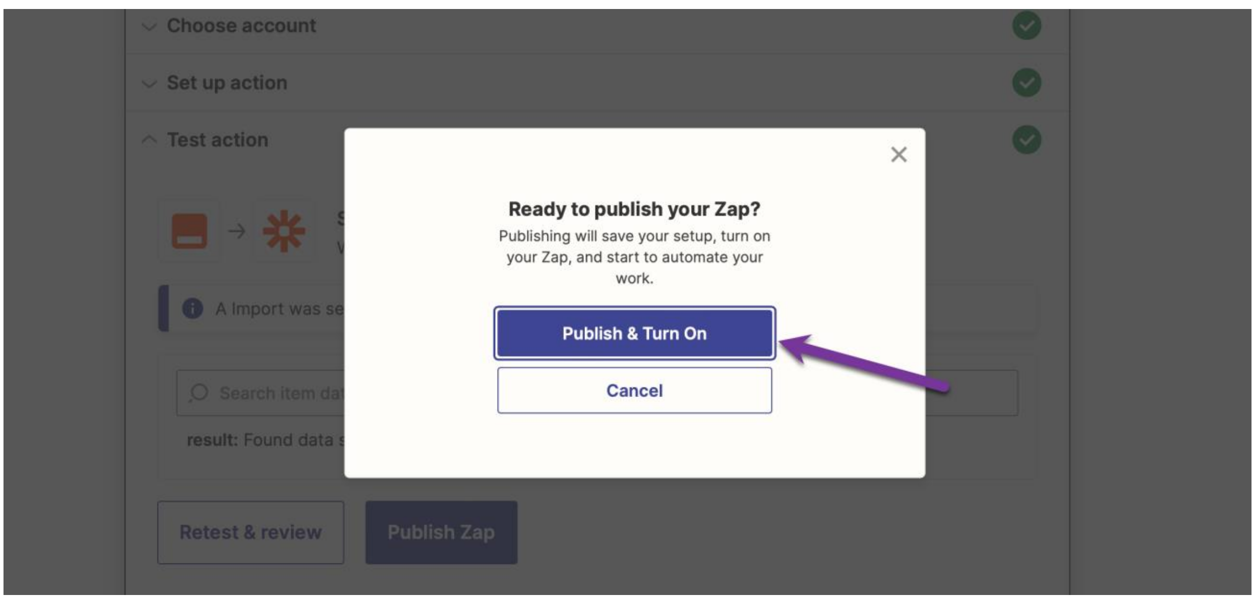
Zapier shows us a preview of the data, and we'll click "Test & continue".



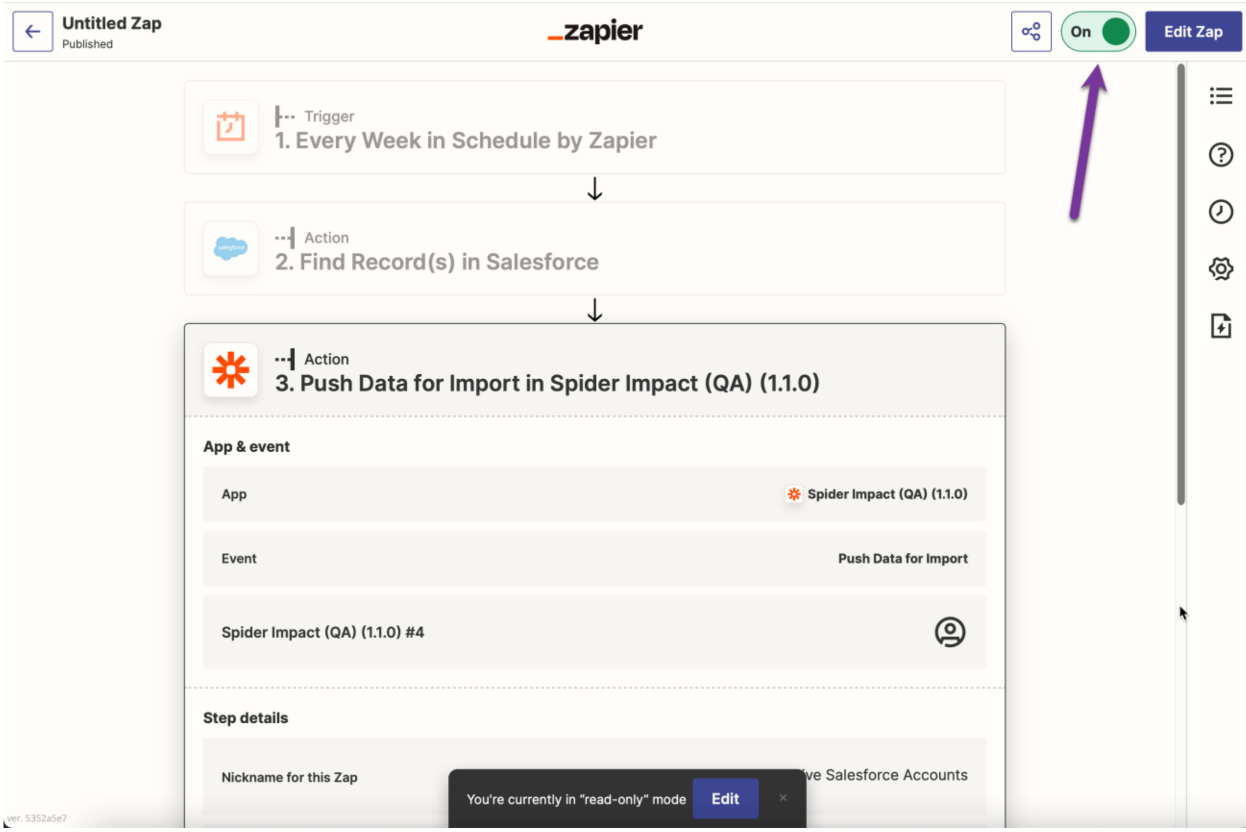
The results say that our import worked, so we'll click Publish Zap.



One more confirmation and we're good to go.

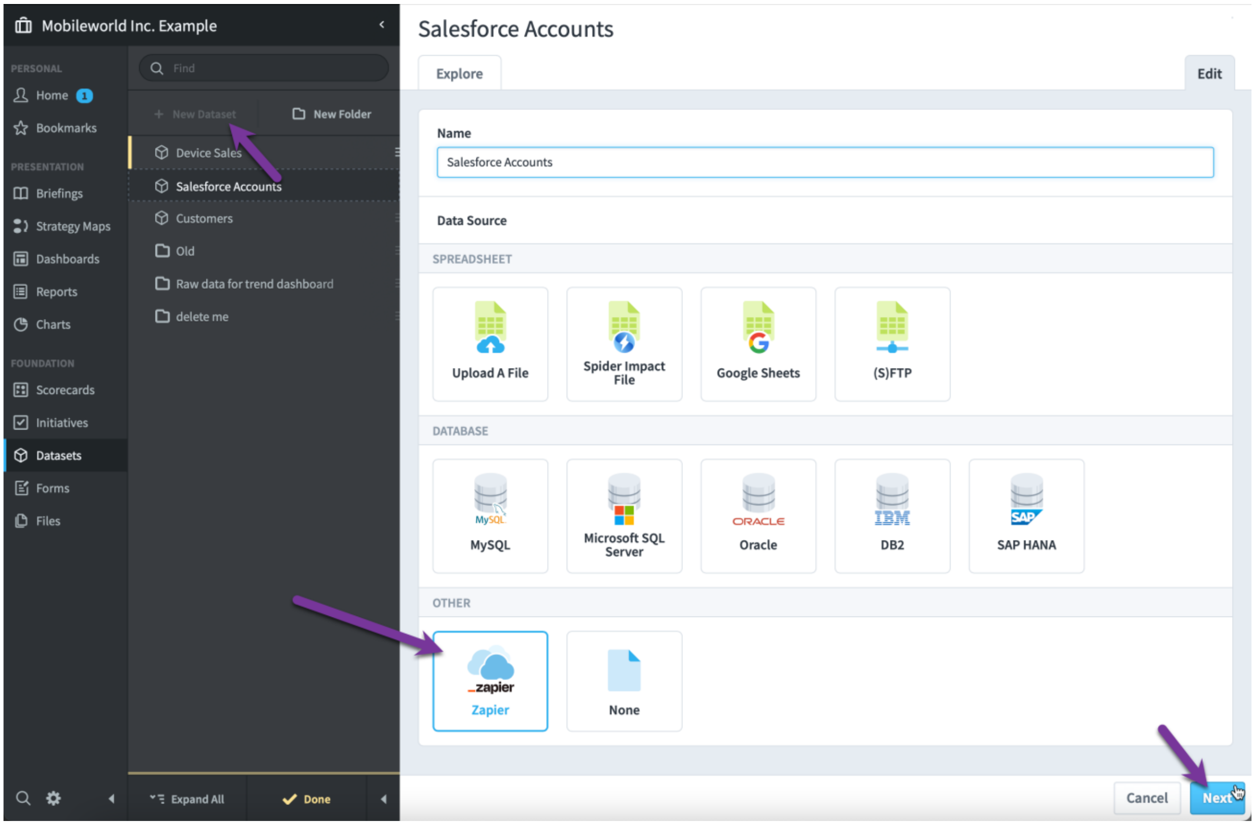


Finally, our Zap is published. We can see a summary of our Zap, and in the upper right corner we can see that it's turned on.

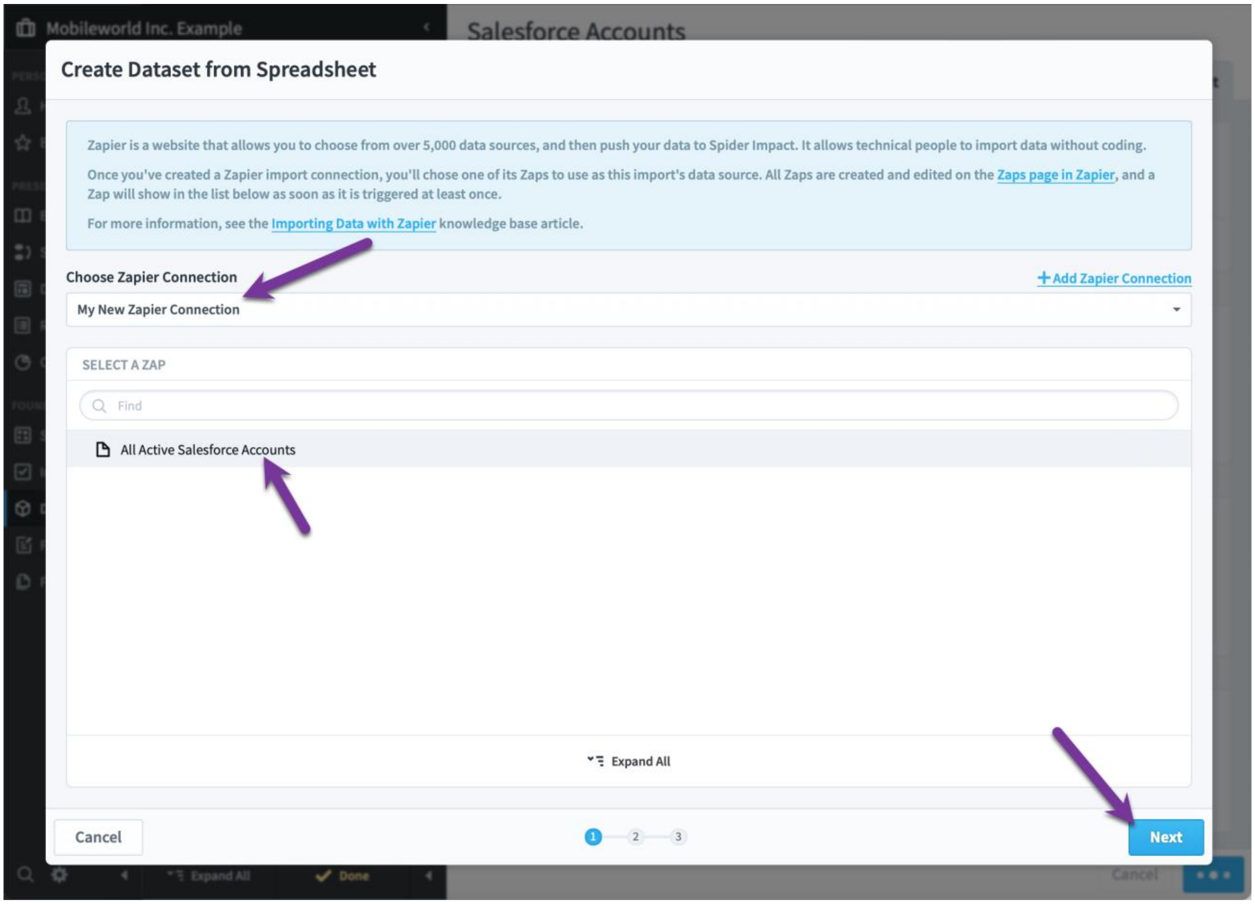


Importing data in Impact

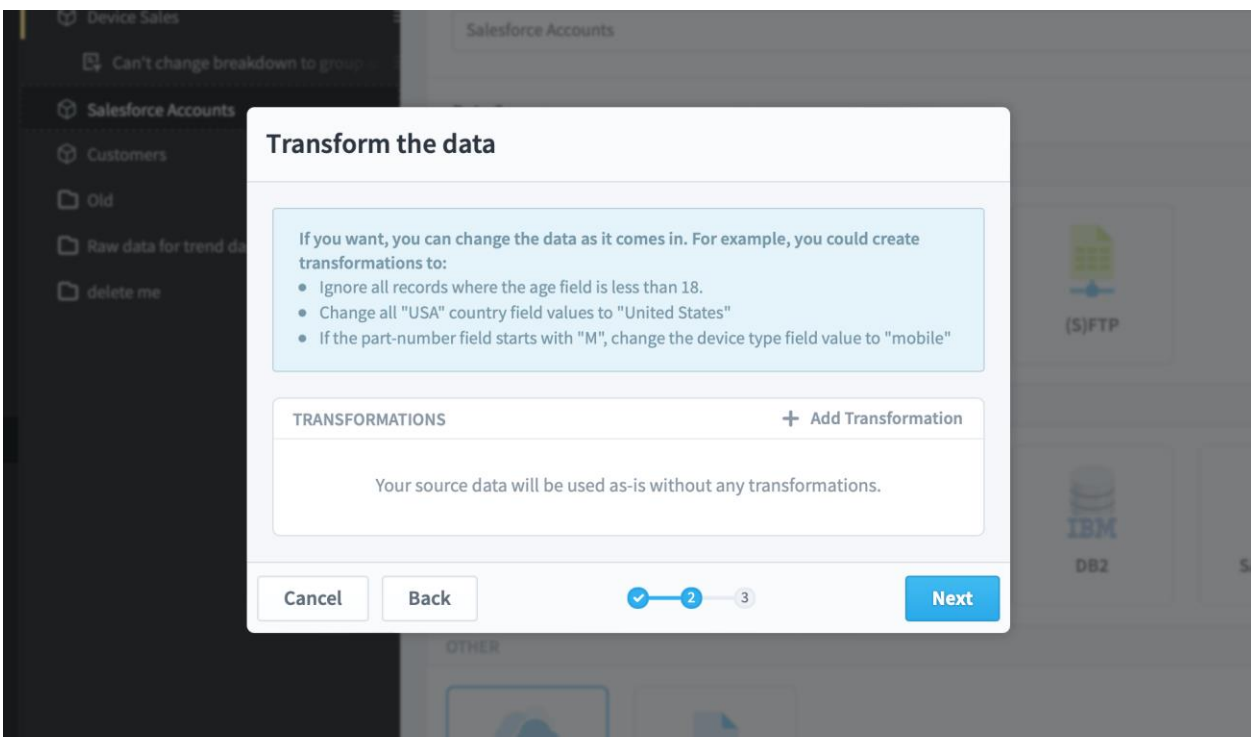
To import Zapier data in Spider Impact, start a data import like you would with any other data source. In this example we're creating a new dataset.



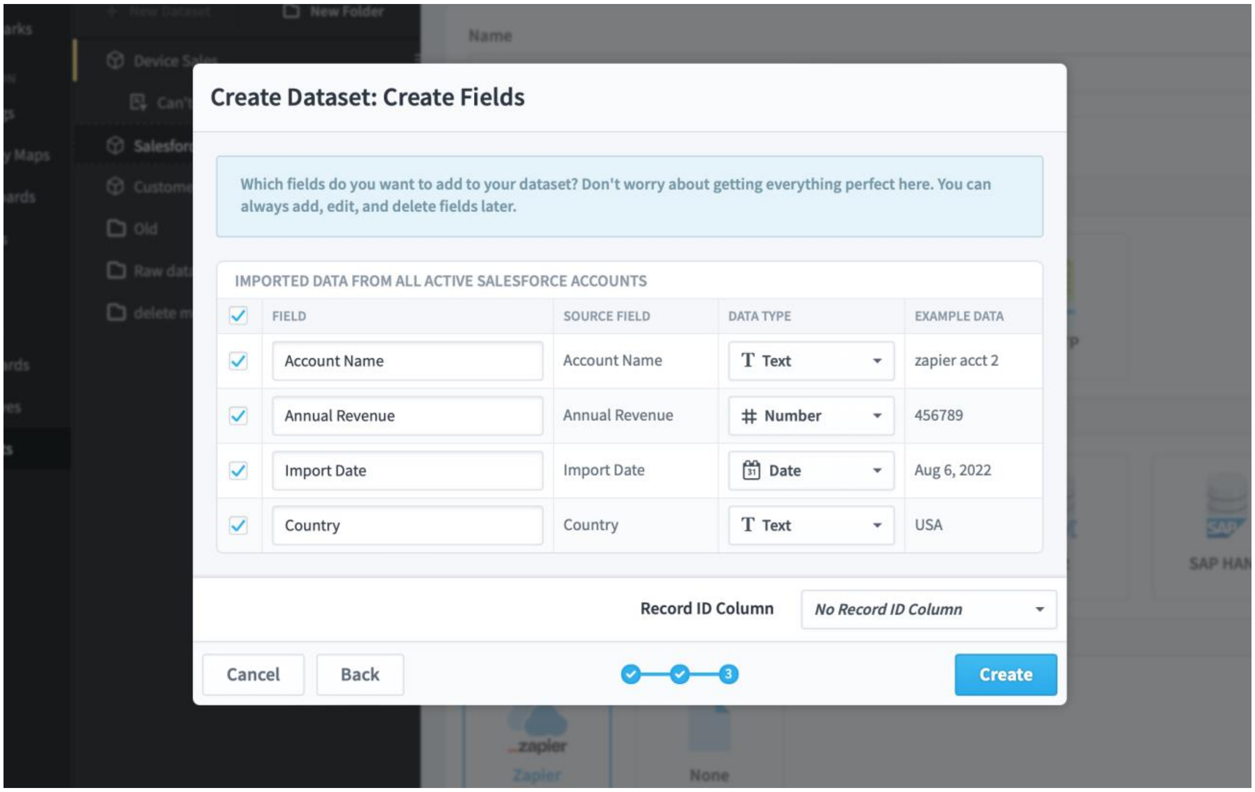
Choose the Zapier import connection that we set up earlier, and then choose one of its Zaps. If you don't see the nickname of a Zap that you've set up in Zapier, it's most likely because that Zap hasn't been triggered yet.



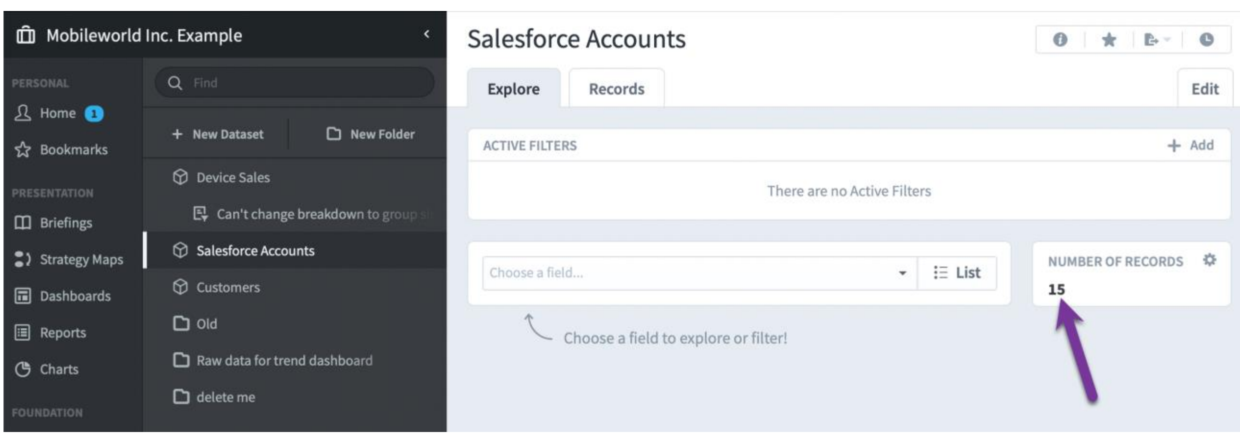
Next is the optional data transformation step.



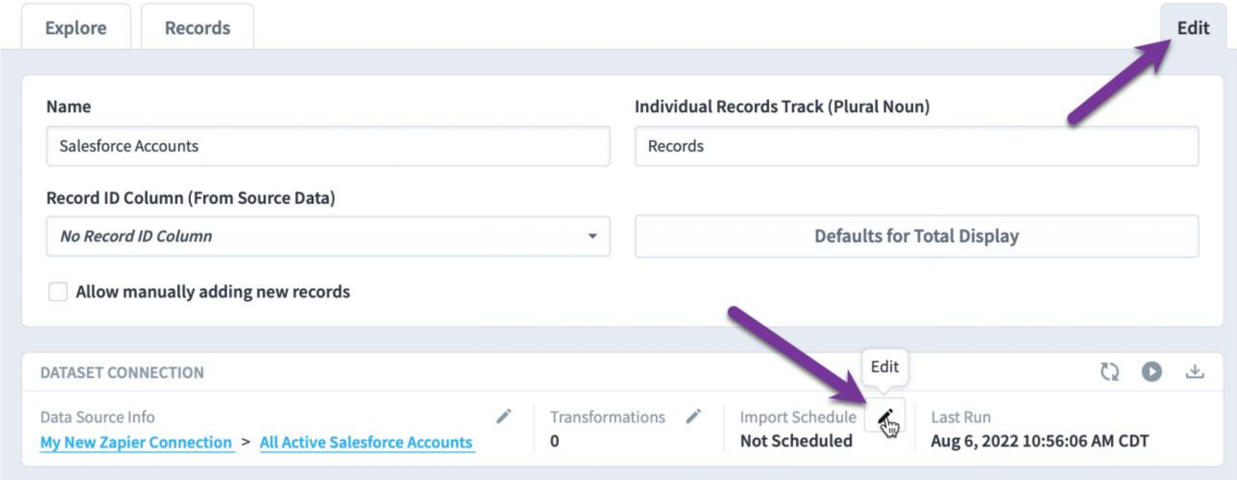
And finally is the step where you choose which fields you want to create in the dataset. As you can see, these are the fields we set up earlier in our Salesforce Zap.



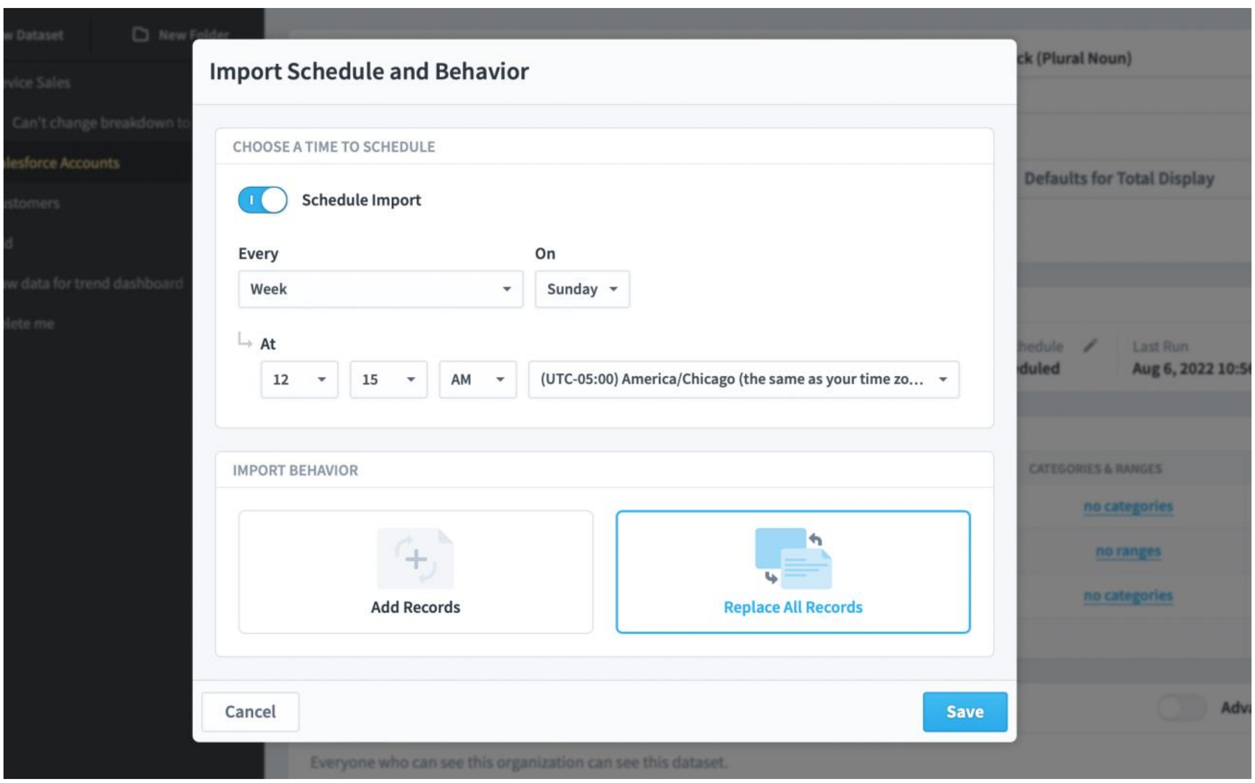
When we click Create we now have a dataset with our 15 Salesforce account records.



Now that our dataset is built, there's one more thing to do. Right now, Zapier is sending data to the Spider Strategies Zapier server on a regular basis, but Spider Impact isn't regularly reaching out to the Spider Strategies Zapier server to get it. So, we'll go to the Datasets Edit tab and click the "Edit" button for the import schedule.



We'll turn on "Schedule Import" and have it run 15 minutes after Zapier sends the data every Sunday night.

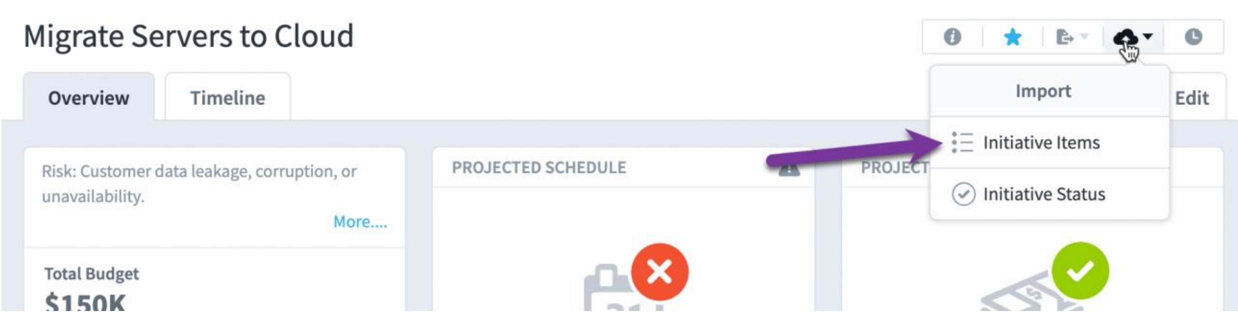


Zapier import size limit

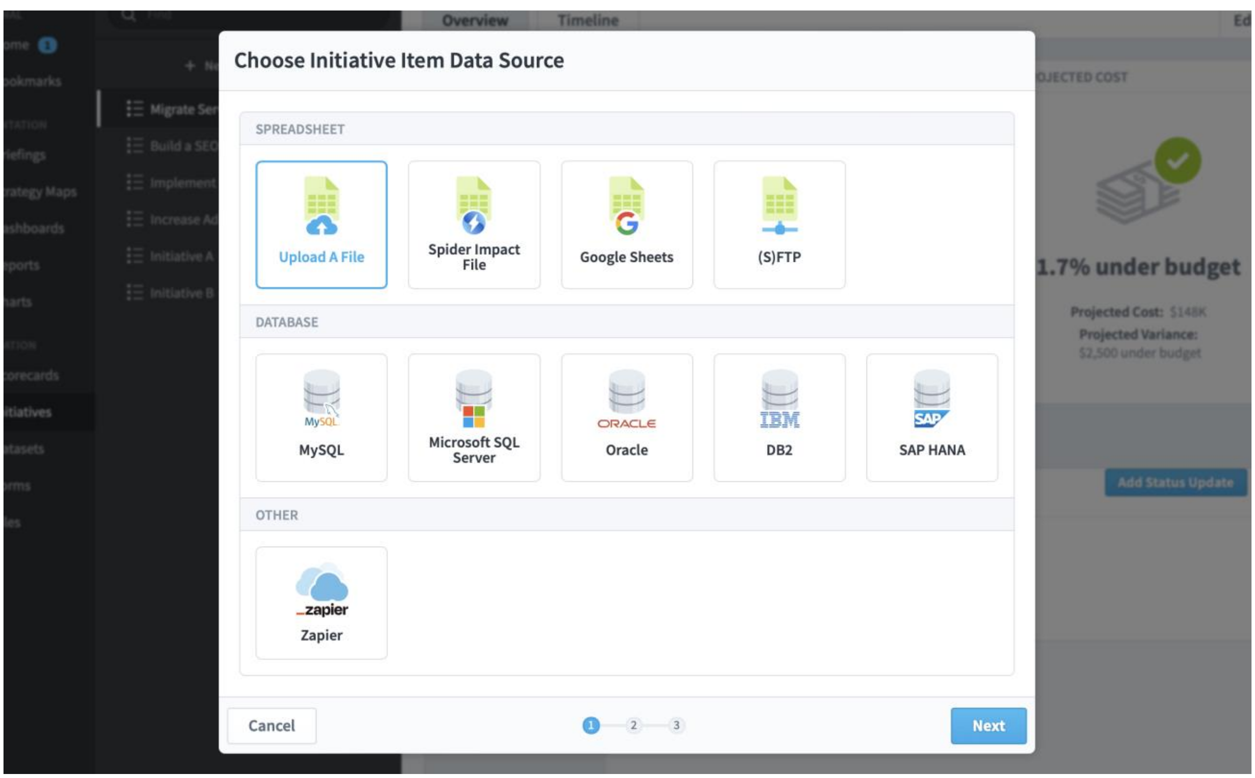
Every time a Zapier import runs, it is currently limited to 6 megabytes of transferred data. That's over 50,000 typical records, so it's very unlikely that you'll hit this limit when importing KPI or initiative values, or when adding records to a dataset. It is possible that you'll hit this limit when replacing all records for a large dataset, so Zapier may not be a good fit for those situations.

Importing initiative items

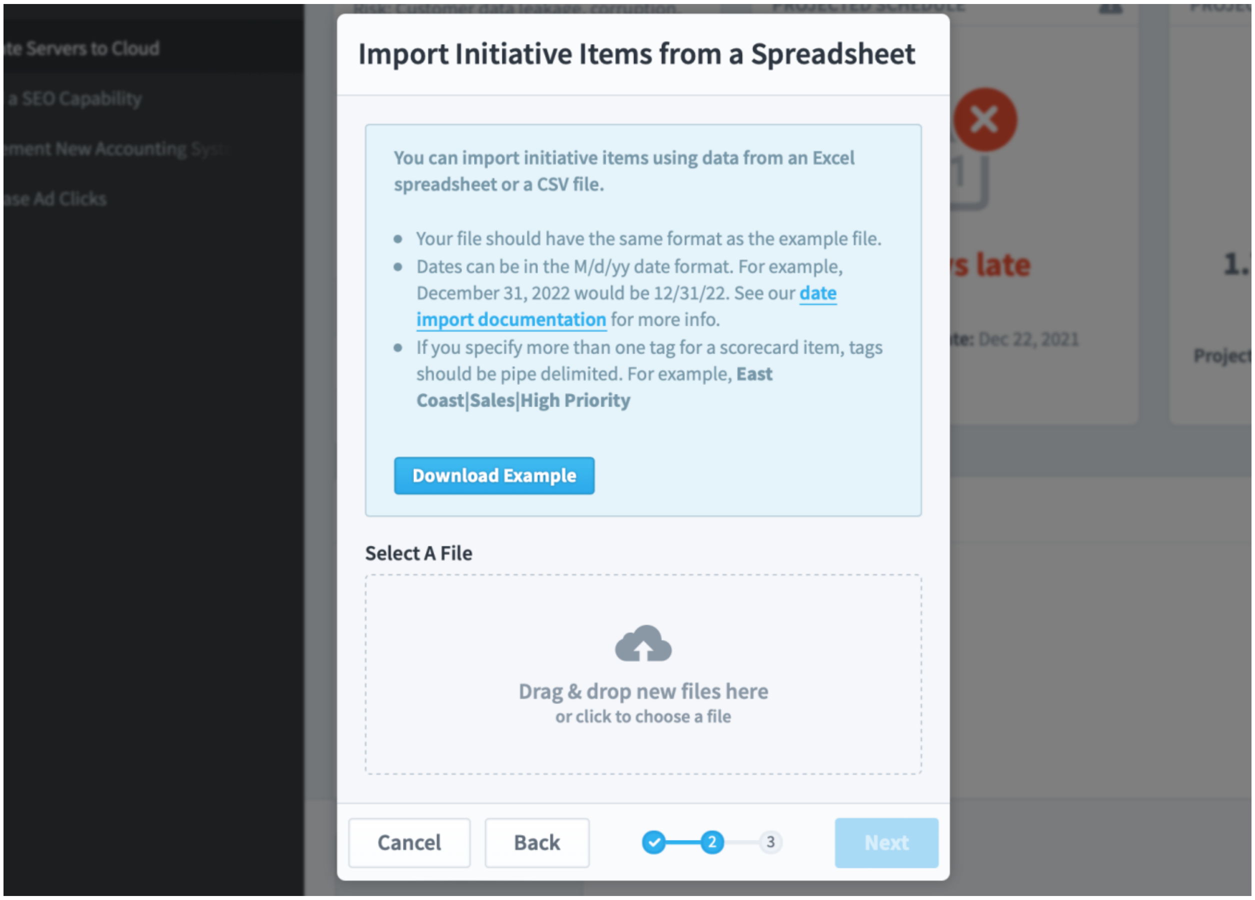
You can now import initiative items.



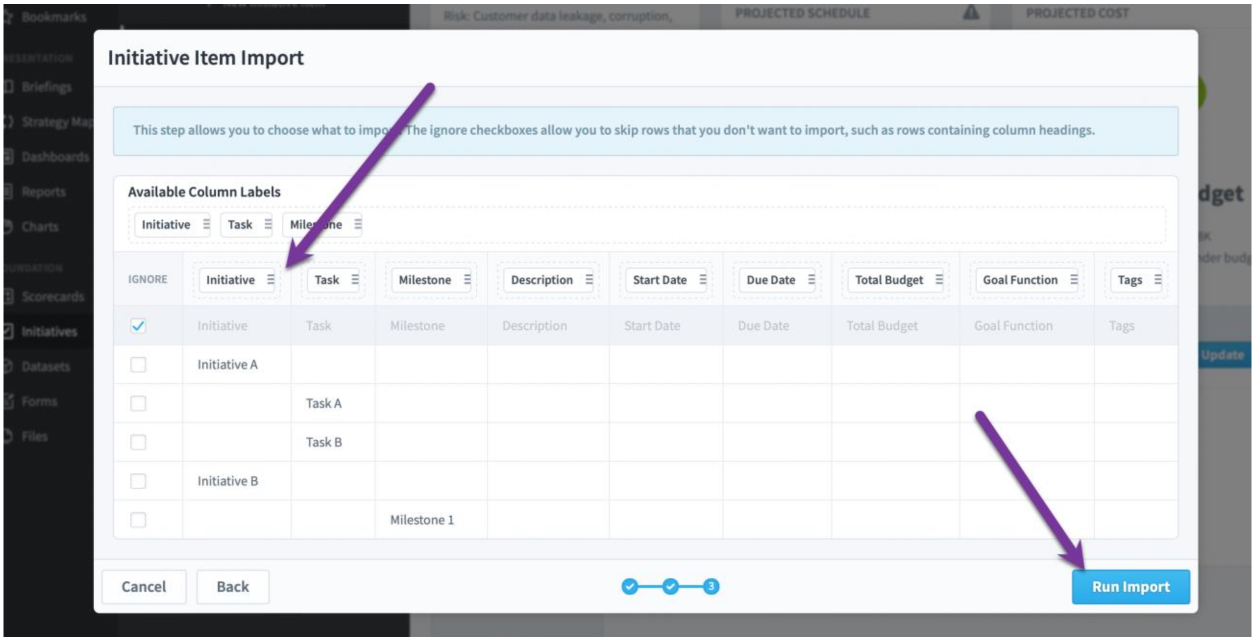
The first step of the process is the same as all of the other types of imports where you choose the data source.



Here we've chosen to upload a file. You can download an example file in the instructions above.

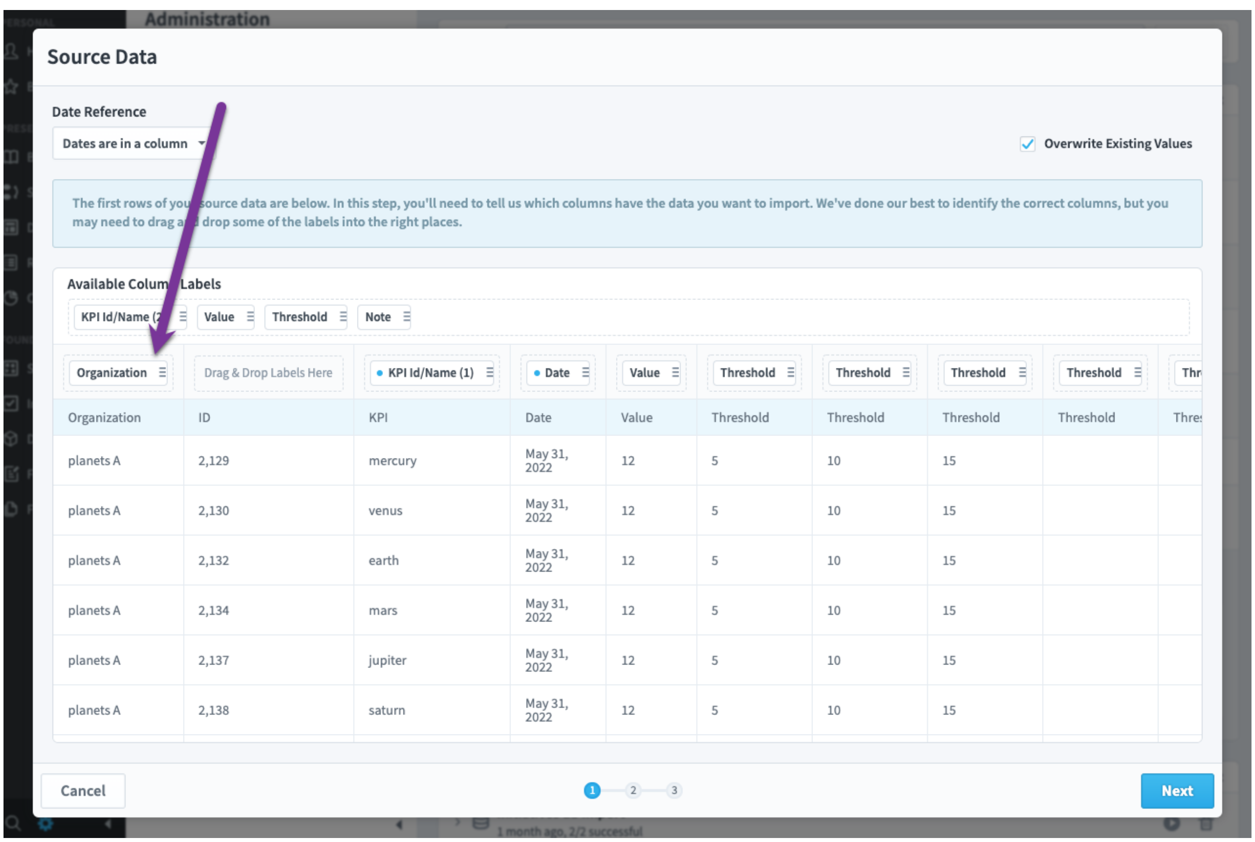


The final step is mapping. Just like with scorecard item imports, you drag and drop header labels to identify the various initiative fields.

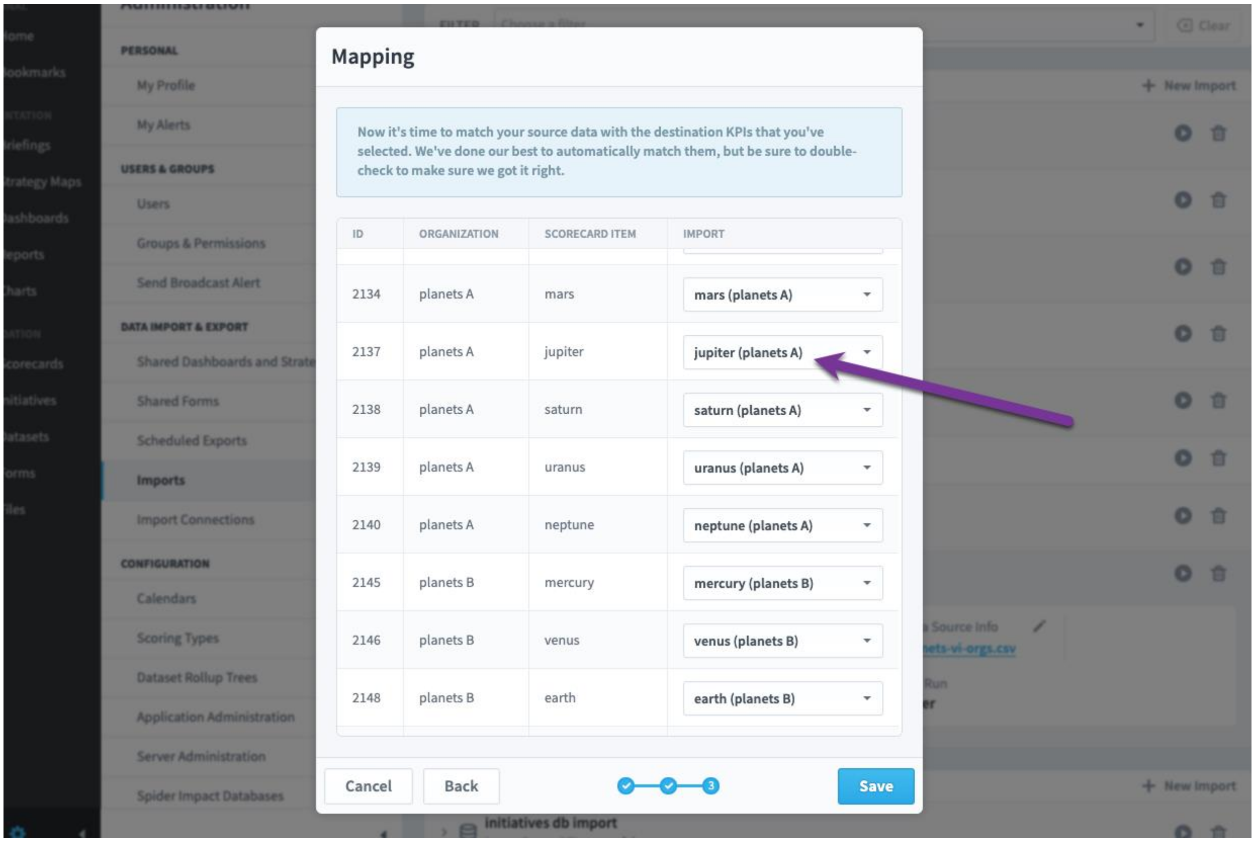


Organization column for KPI value import

There is now an optional Organization column for KPI value imports. This is helpful when multiple organizations have similarly named KPIs.

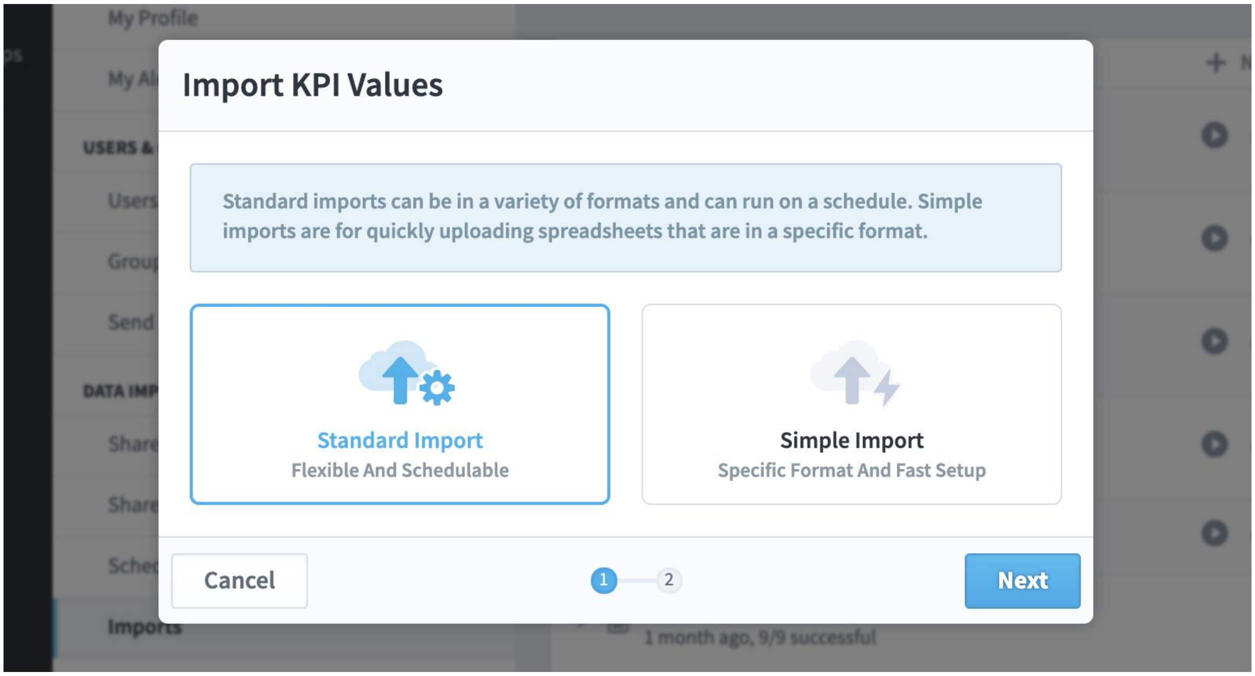


When the organization column is used, its value will appear in parentheses next to the KPI name.



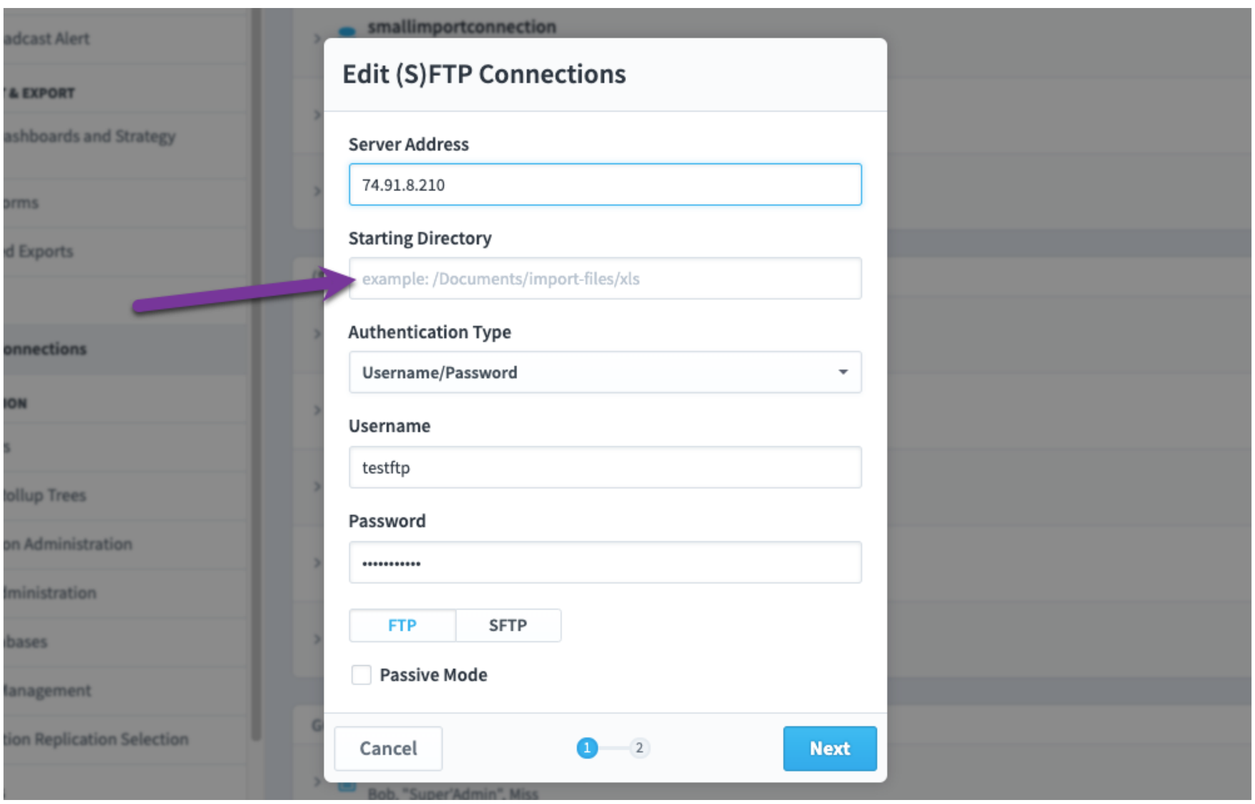
Improved naming of KPI value import options

The "Advanced Import" option when importing KPI values is now called "Standard Import". It's also now the default.



Starting directory for (S)FTP import connections

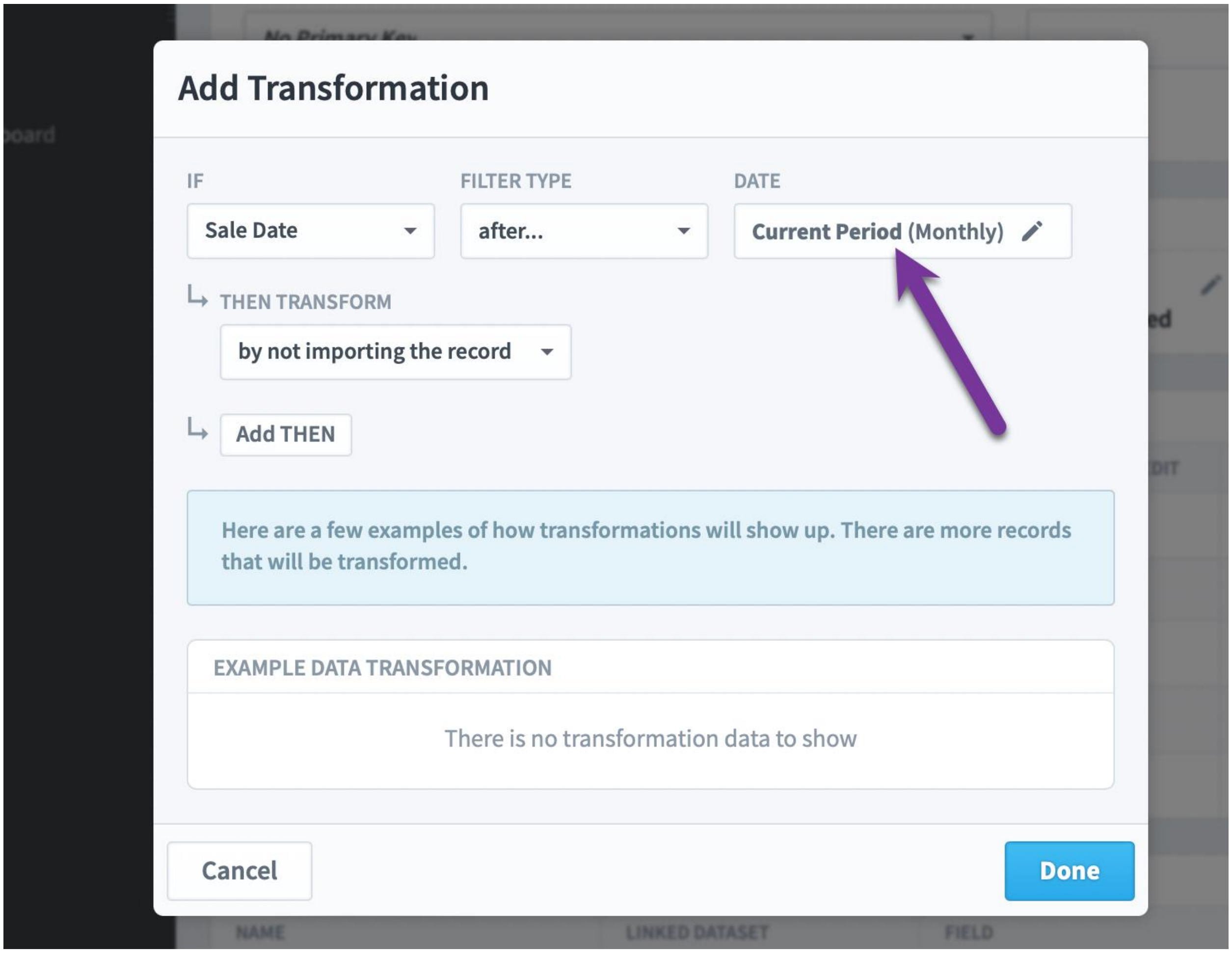
You can now choose a starting directory for S(FTP) import connections.



This is very useful when you only want to give users access to a subset of files on the (S)FTP server.

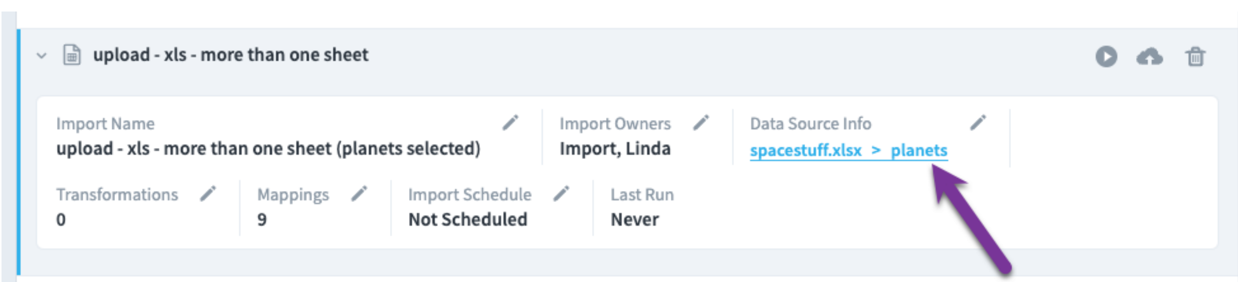
Relative dates in transformations

You can now reference relative dates in import transformations. "Current calendar" is the default calendar you see when logging in, and "current period" refers to whatever period the current date is in.



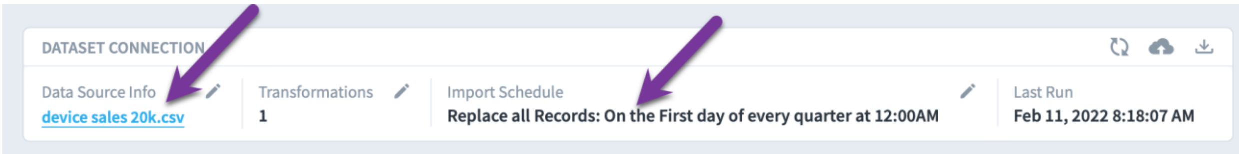
Spreadsheet tab name shown in Administration

When a spreadsheet has multiple tabs, the selected tab is now shown on the Administration > Imports screen.



Schedule all spreadsheet imports

You can now schedule uploaded spreadsheet imports just like any other data source. This will re-import the same spreadsheet that was uploaded earlier, and is useful in specific situations like generating random data or importing a constant value.



Importing data from SAP HANA

The SAP HANA in-memory database can now be used as a data source for data imports. This adds to the list of supported import databases that already includes databases like SQL Server, MySQL, Oracle, and DB2.

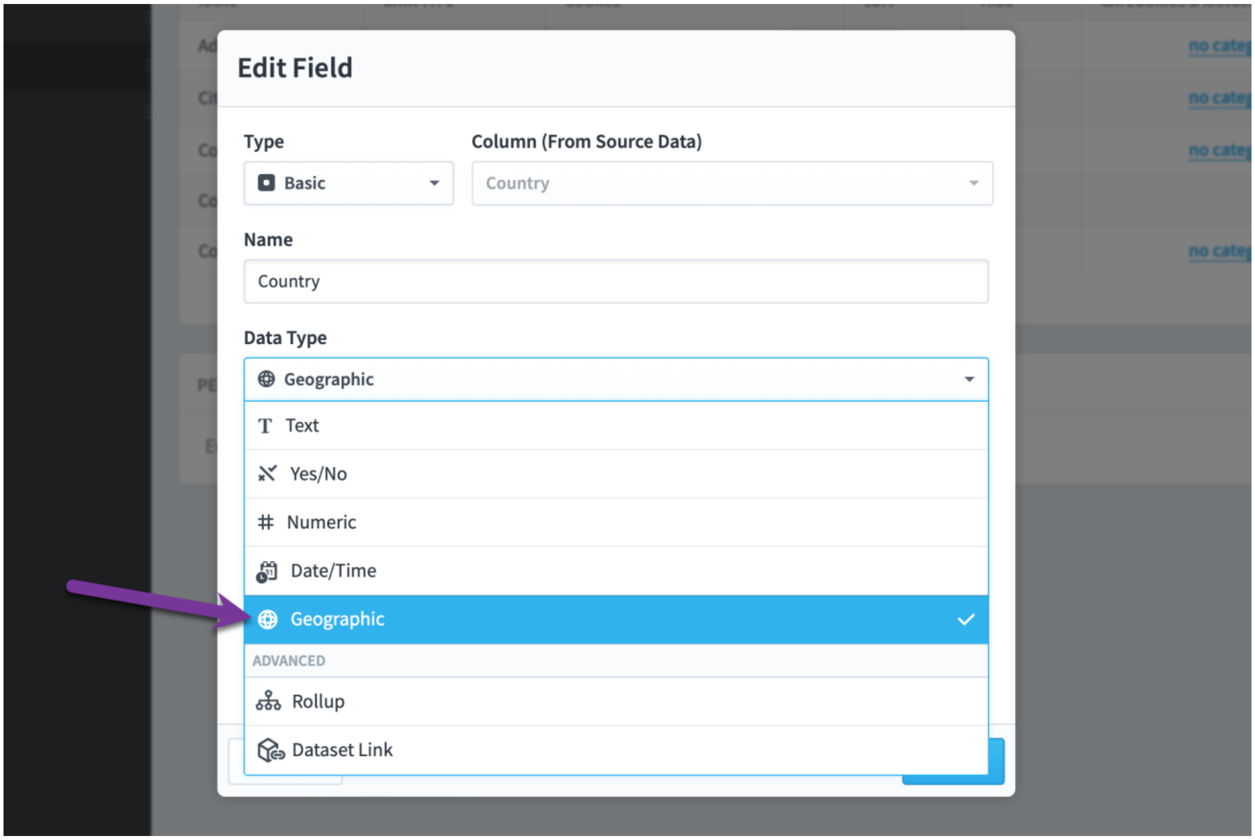
Datasets

Geographic dataset fields

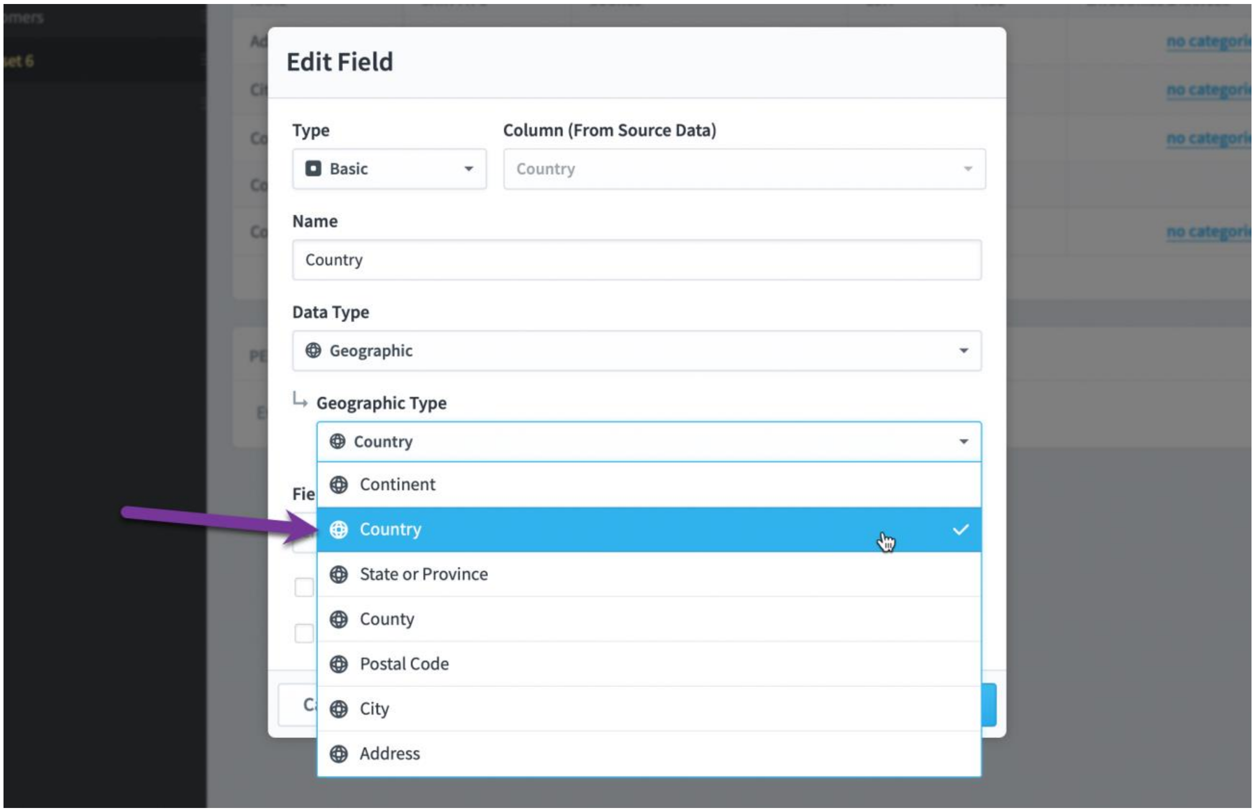
Datasets can now have geographic fields. Geographic fields are great for tracking data like the country, city, and postal code fields that you see in this spreadsheet of example customers.

	A	B	C	D	E	F	G	H	I	J	K
1	Customer ID	POC First Na	POC Last Nai	POC Phone N	POC Email	Company	Address	City	State or Province	Postal Code	Country
2	AAAV-22209	Seth	Galayda	503-365-589	seth.galayda@gmail.com		4752 Main St #6713	Portland	OR	97209	United States
3	AABI-37357	Randy	Ferko	352-616-202	randy@aol.com		3556 S 21st St	Ocala	FL	34470	United States
4	AACE-49383	Nieves	Denegre	510-635-889	nieves.denegre@cox.net		6278 Pali Momi St #3	San Leandro	CA	94577	United States
5	AACG-26513	Ema	Coodey	216-868-482	ema.coodey@coodey.com		32 N Trimble Rd	Maple Heights	OH	44137	United States
6	AADO-16329	Ezequiel	Hitz	01528-76721	ehitz@hitz.co.uk		61 Maddox St	Bryanston and Dorset Square Wa		W1U 6BU	United Kingdom
7	AADU-61935	Clinton	Leitheiser	718-520-169	clinton_leitheiser@hotmail.com		16573 Solano Way	Brooklyn	NY	11215	United States
8	AAEB-49062	Emmett	Disabato	615-984-856	emmett@hotmail.com		6396 S Academy Blvd	Franklin	TN	37064	United States
9	AAFP-40137	Gigi	Magsayo	973-383-809	gigi@magsayo.com		517 Salina Meadows Pky	Newton	NJ	7860	United States
10	AAGT-61111	Julian	Reinert	513-895-716	julian_reinert@gmail.com		383 Old Columbia Pike	Cincinnati	OH	45202	United States
11	AAHE-89127	Bell	Hadson	856-257-804	bell_hadson@hadson.org		69 Park Ave	Riverton	NJ	8077	United States
12	AAHF-19505	Nga	Gantewood	780-399-356	nga_gantewood@cox.net		96 E 67th St	Edmonton	AB	T6H 0H9	Canada
13	AAHT-21210	Lyle	Newes	03-1188-503	lyle.newes@yahoo.com		27 Hazel St #3965	Bogong	VIC	3699	Australia
14	AAJF-36401	Randee	Engelkemier	301-971-499	randee@gmail.com		7 Buena Vista Ave	Waldorf	MD	20601	United States
15	AAJN-83472	Shawana	Swamm	541-287-965	shawana@gmail.com		4 Justice Rd	Eugene	OR	97402	United States
16	AAKG-23153	Andreas	Starek	973-634-333	andreas.starek@cox.net		4 Veterans Blvd	Orange	NJ	7050	United States
17	AAKO-27642	Angeles	Amsden	02-9557-385	angeles@gmail.com		490 Fairfield Rd	Crows Nest	NSW	1585	Australia

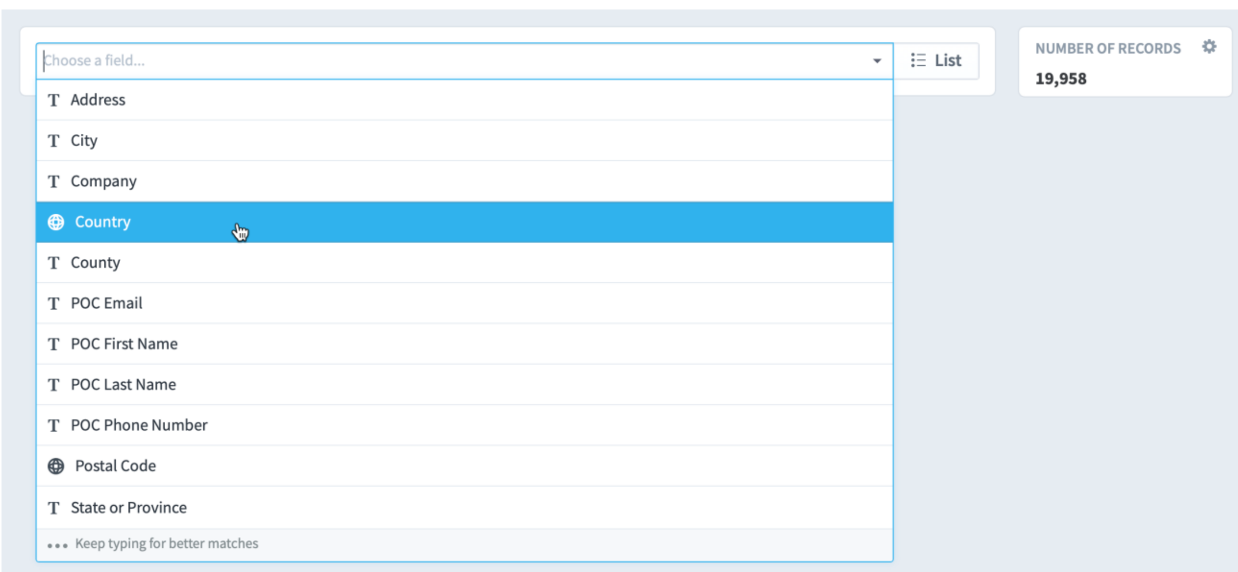
To make a field Geographic, just edit the field and change its data type from Text to Geographic.



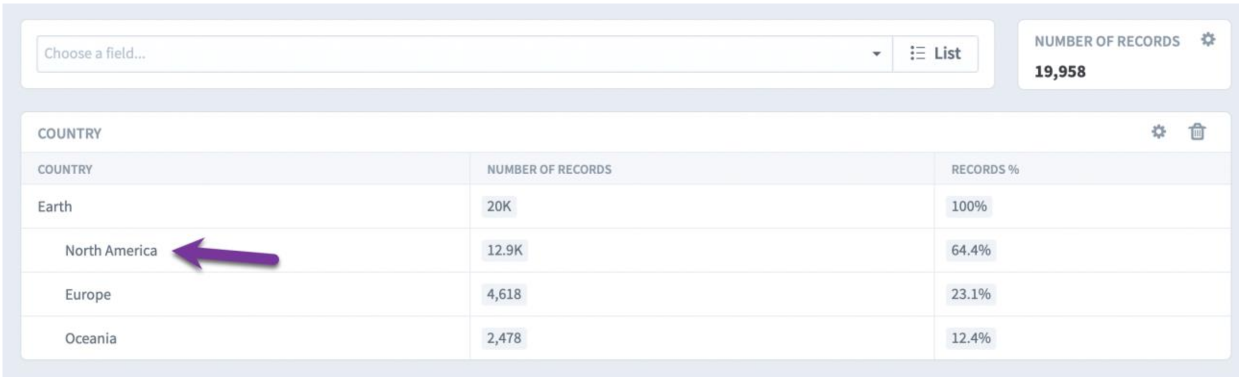
Then choose which geographic type matches the field. In this example we'll choose "Country" because it's a country field.



When we go to the Datasets Explore tab, we now see that our Country field has a globe icon.



When we add the Country field, Spider Impact can show subtotals for each continent rather than listing all of the individual countries. These continents weren't in our original source data, but because Impact knows how all of the geography fields fit together, it's able to aggregate data by region like the North American continent.

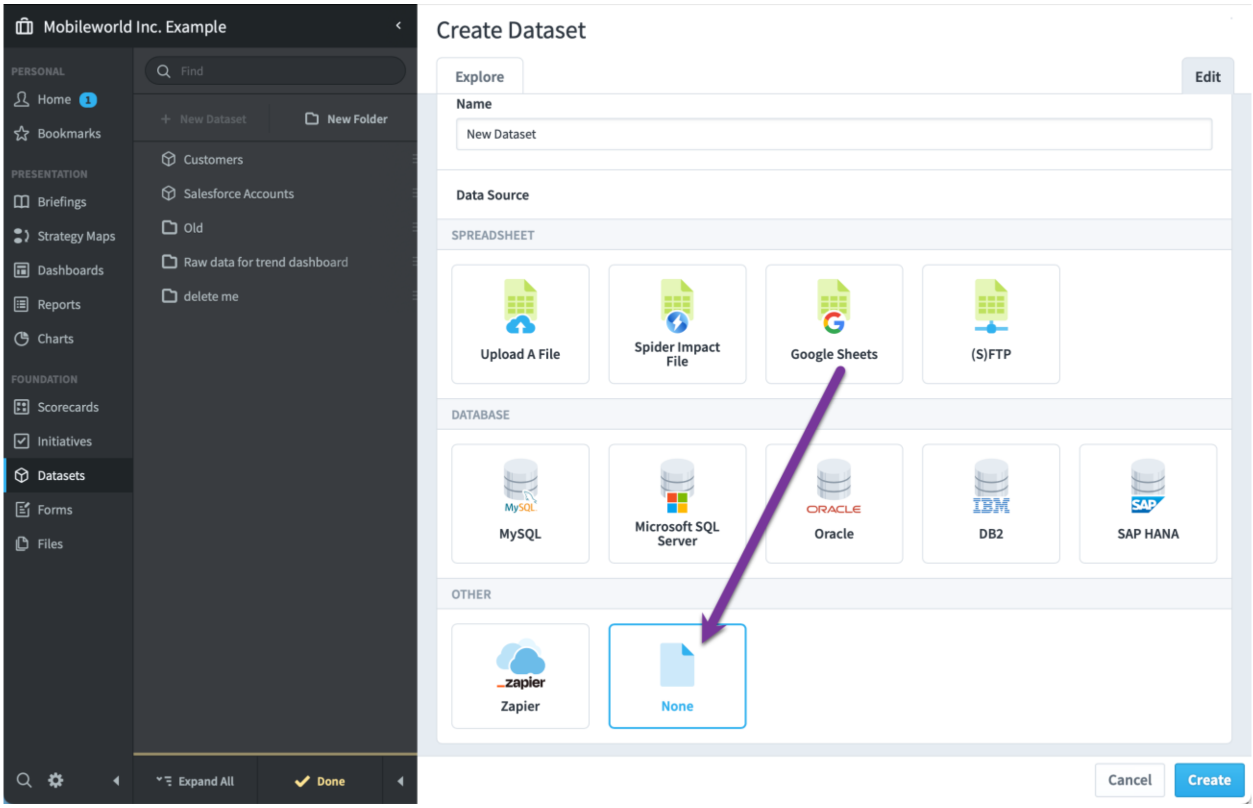


We'll click on North America, which applies a dataset filter of only showing records for North America and the countries inside of it. We also now see the separate totals for the United States and Canada.

Geography fields are the same as dataset rollup trees, except they're built into the software so there's nothing to set up or maintain.

Creating datasets with no data

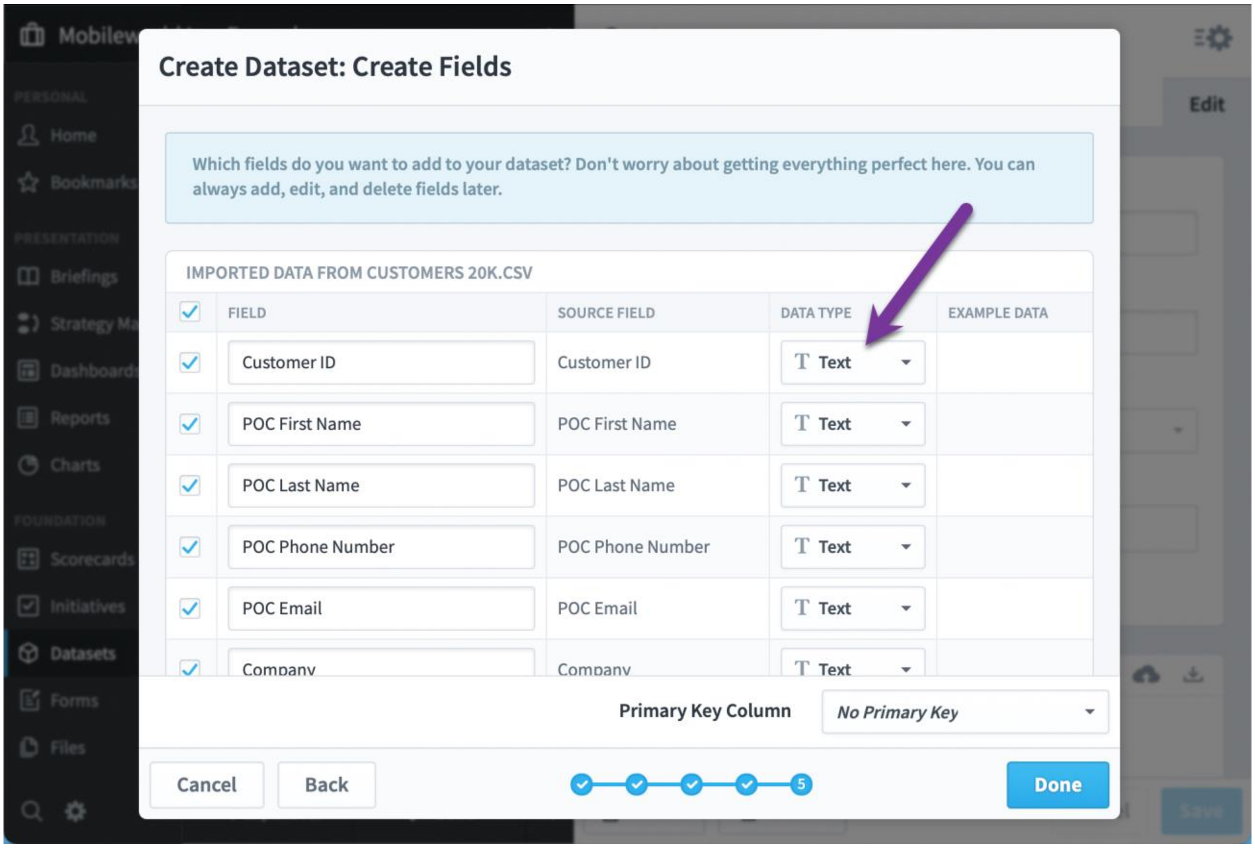
Because datasets are being used to track information that doesn't exist in a system of record, there's now an option for no data source directly in the New Dataset menu.



Spreadsheets don't need records now either. You can just create your dataset columns like this:

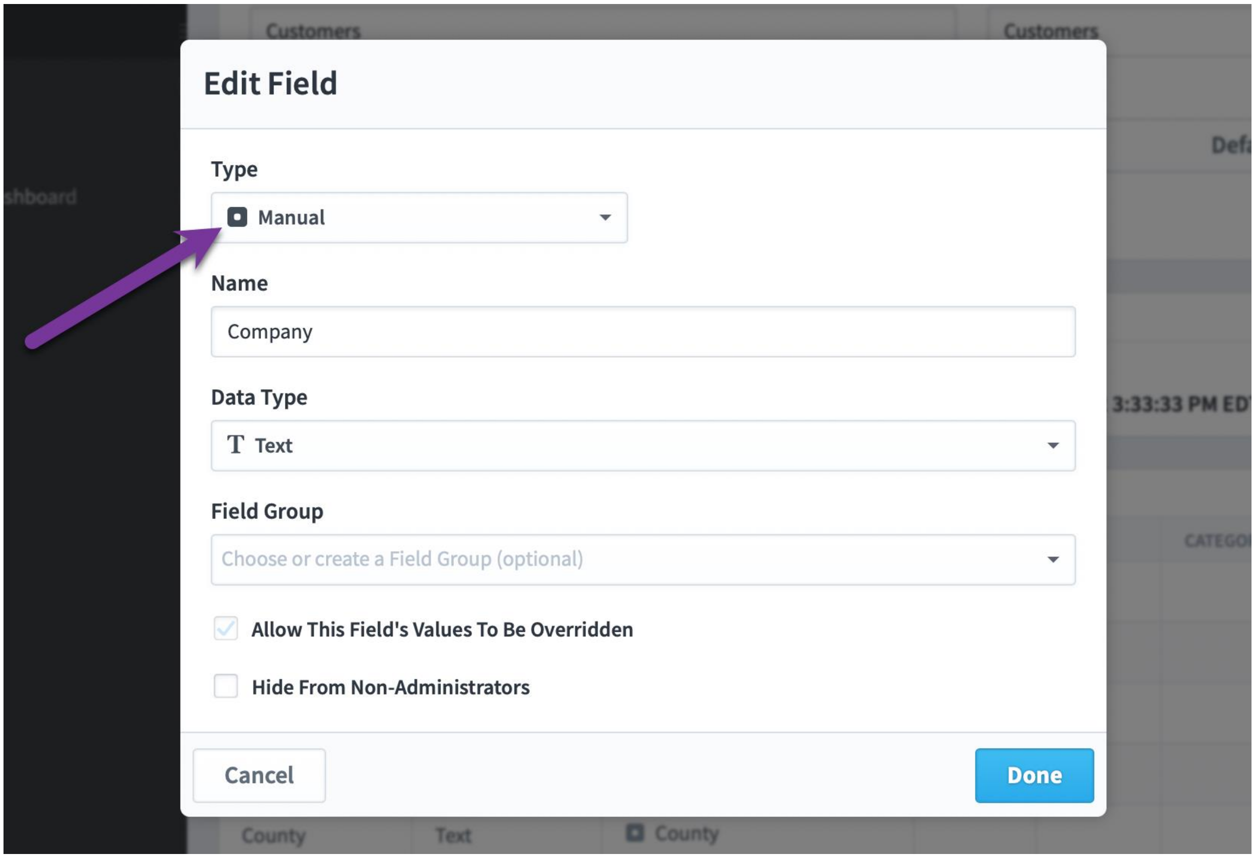
	A	B	C	D	E	F	G	H	I	J	K	L
1	Customer ID	POC First Na	POC Last Na	POC Phone N	POC Email	Company	Address	City	County	State or Prov	Postal Code	Country
2												
3												
4												
5												

And then choose the correct data types.

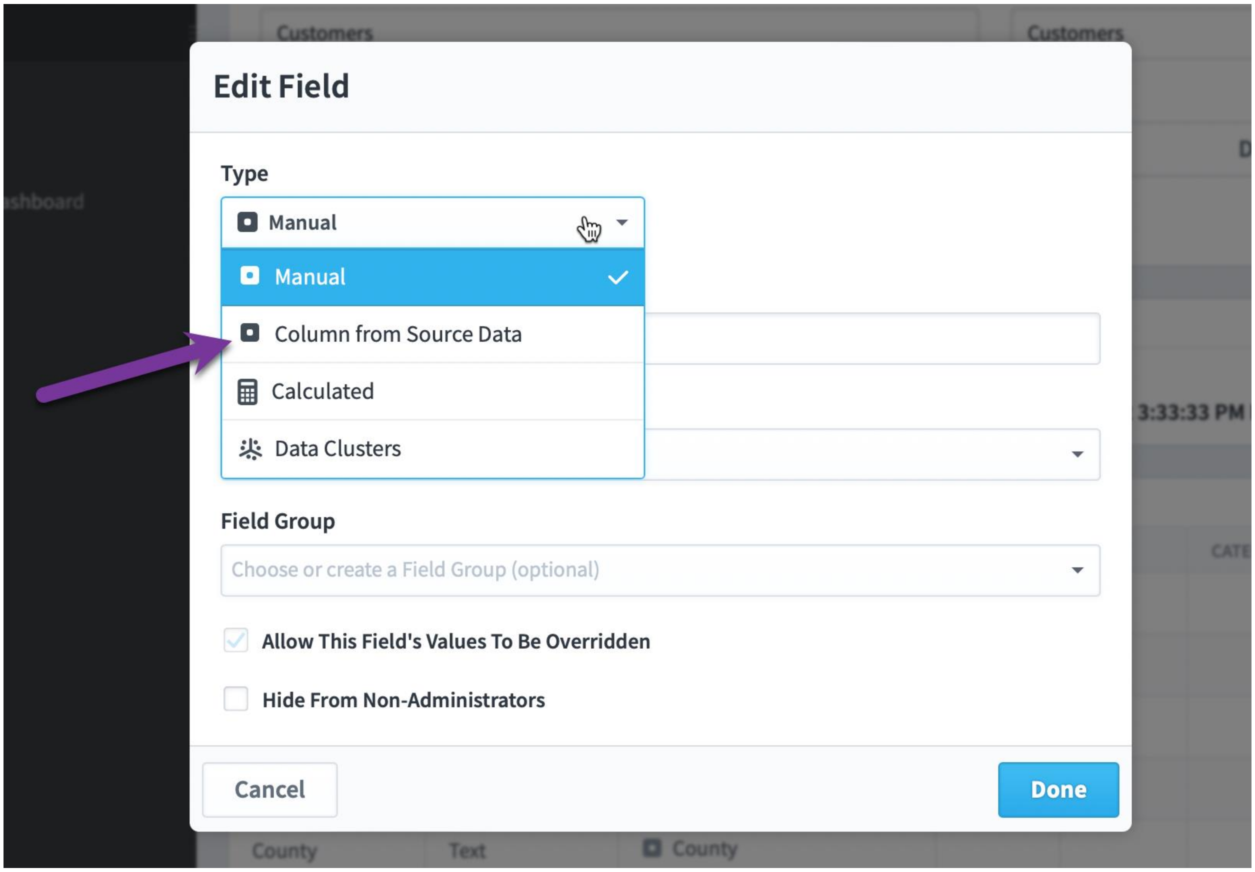


Manual dataset field type

You can now create dataset fields with a type of Manual. These are fields that are blank by default and have no data source. They're useful in forms that are collecting completely new data.

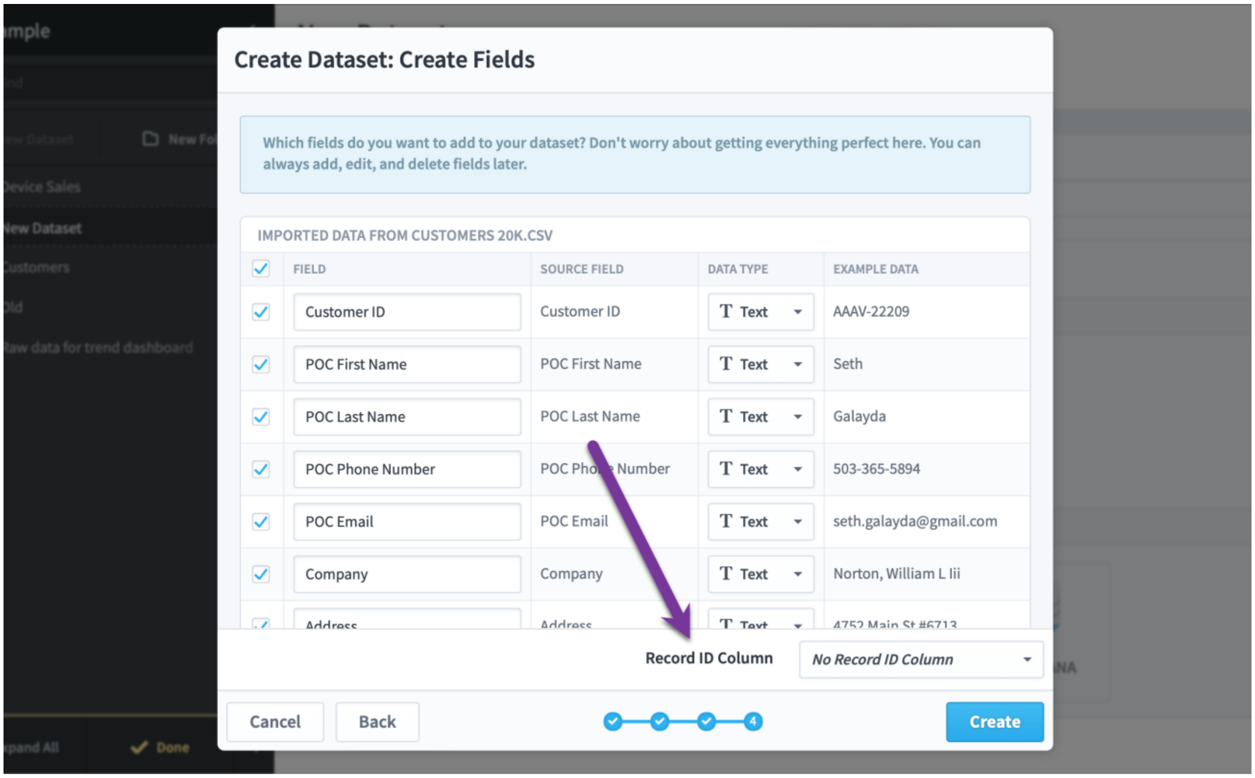


The old "Basic" field type is now called "Column from Source Data" to differentiate it more clearly from the new "Manual" type.



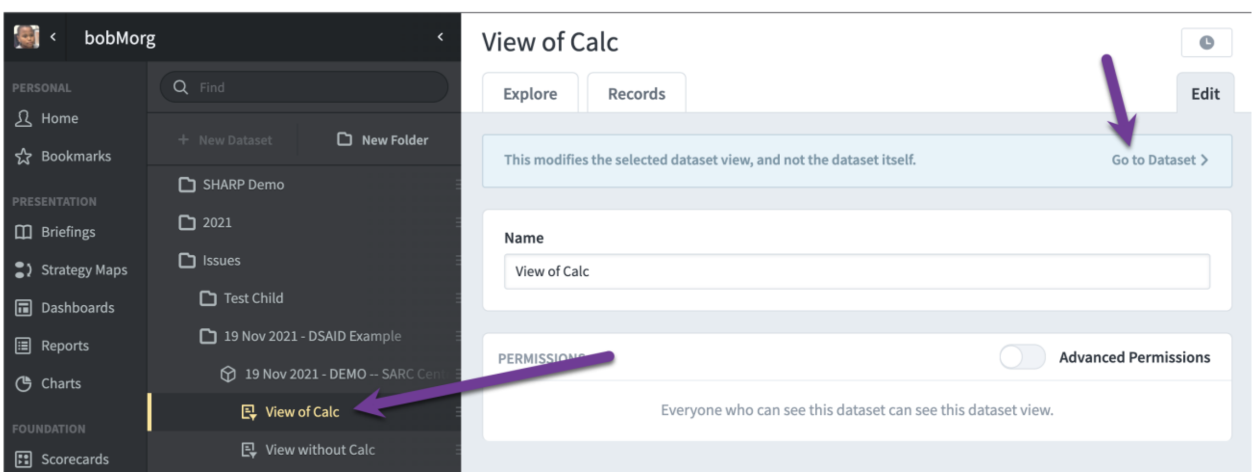
Dataset "primary key" is now called "record ID"

Phrases like "Primary Key Column" and "Primary Key Field" are now called "Record ID Column" and "Record ID Field". This avoids confusion with database primary keys, and does a better job of describing how these unique record IDs are used by datasets.



Dataset views show a link to their dataset

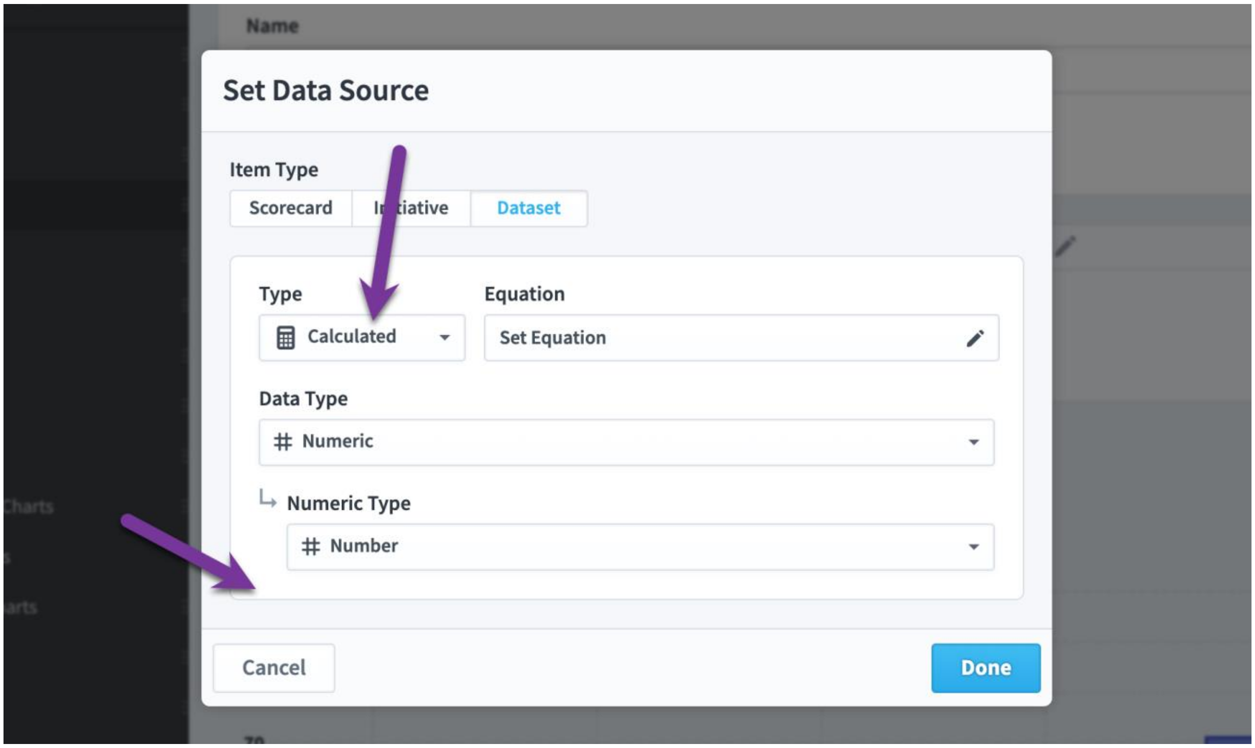
There is now a "Go to Dataset" link on the Edit tab of dataset Views. This is helpful when clicking on a View's Edit tab with the intention of editing a Dataset.



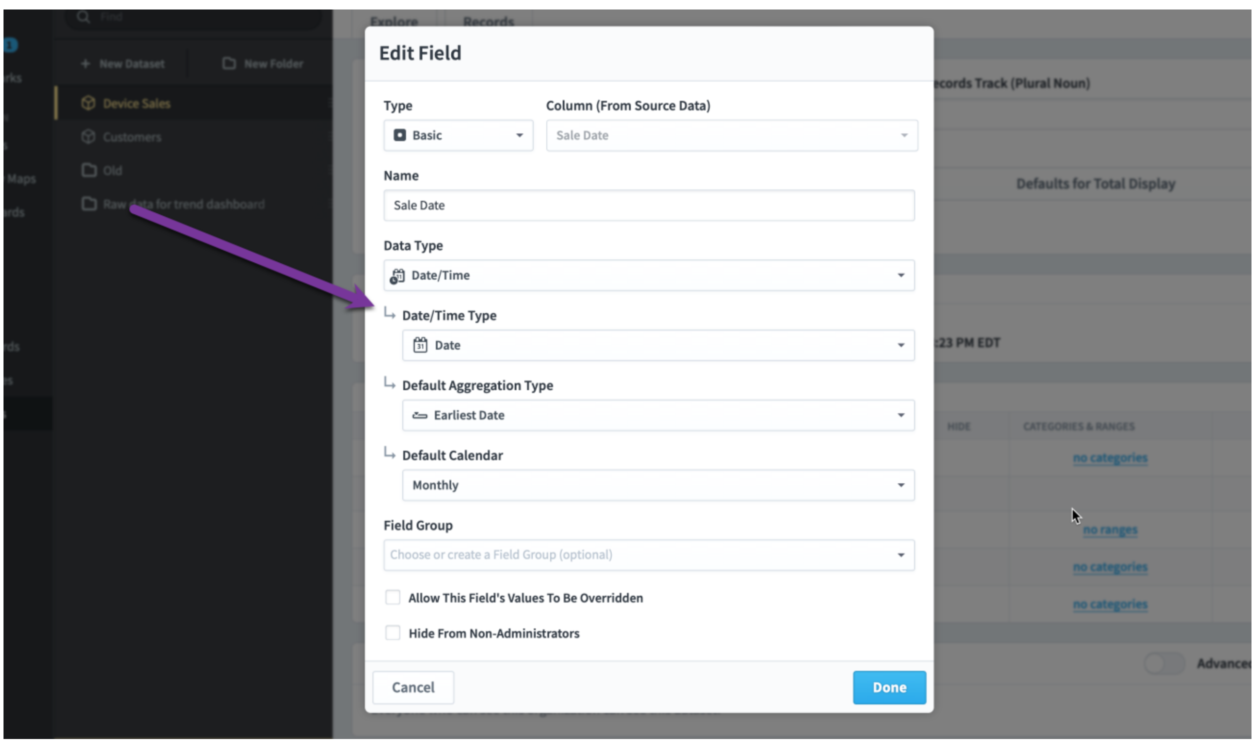
Improved layout of data source dialogs

There are several changes throughout Spider Impact that make it easier to choose what data you want to use. The Set Data Source dialog used by Charts and Reports now shares a common layout with the Edit Field dialog in

Datasets. The Type choice has been moved to the left of the Equation, and the aggregation type is now removed for calculated data sources.

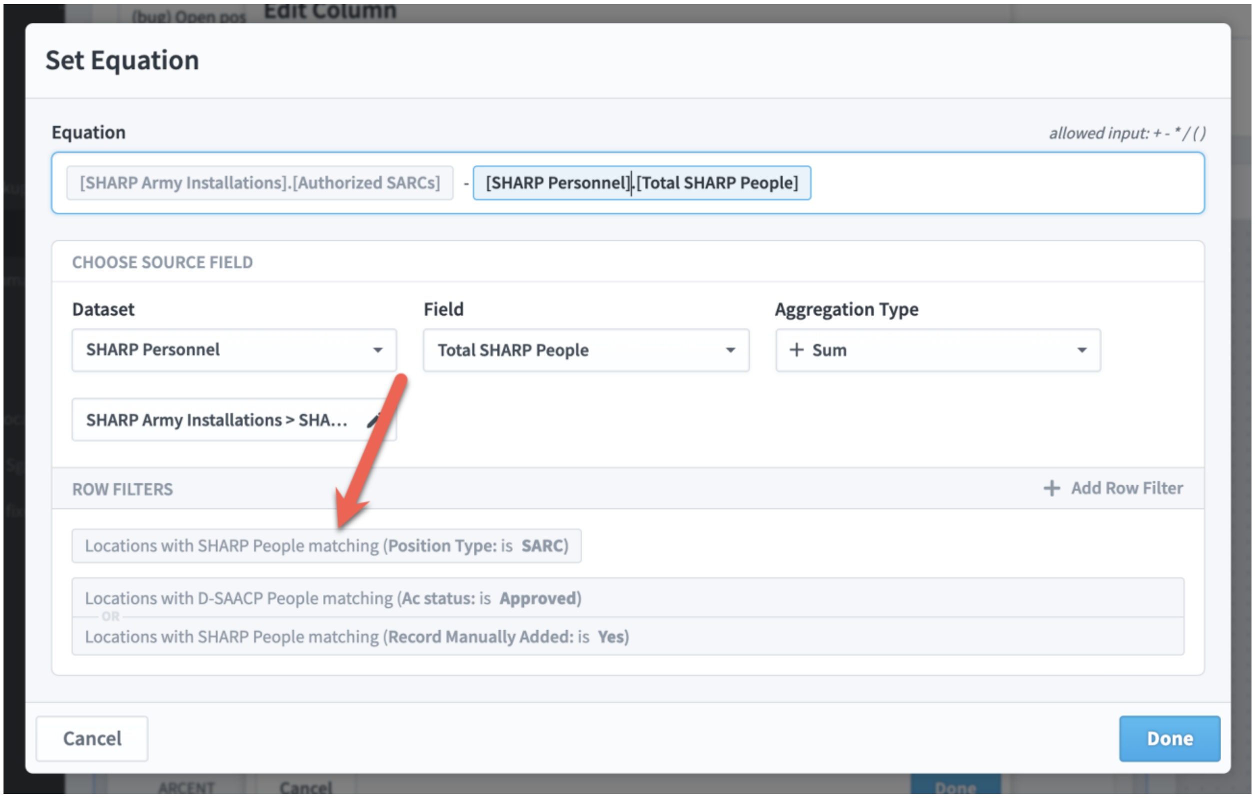


Options that depend on the Data Type are also now indented underneath the Data Type choice.

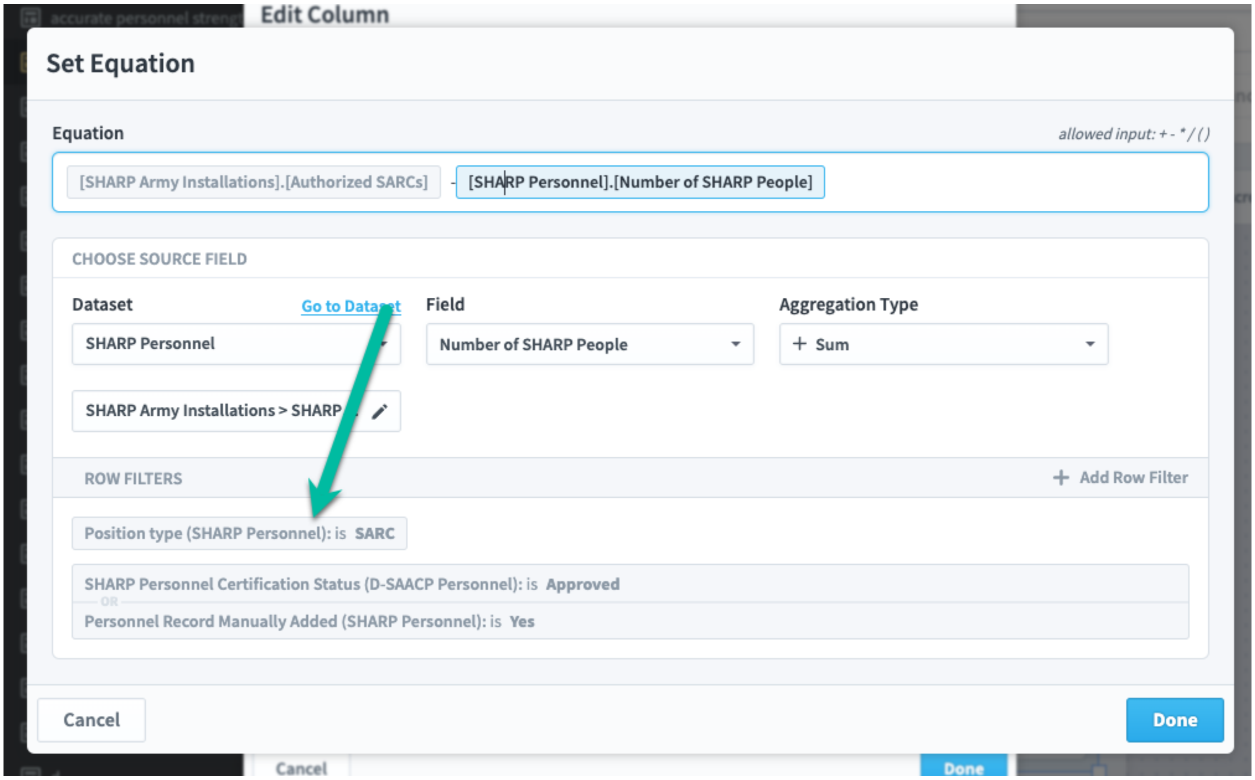


Improved display of filters

Filters for linked dataset are now displayed in a way that much easier to read. This is what it used to look like when you were filtering on the Position Type field in the SHARP Personnel dataset having a value of SARC:

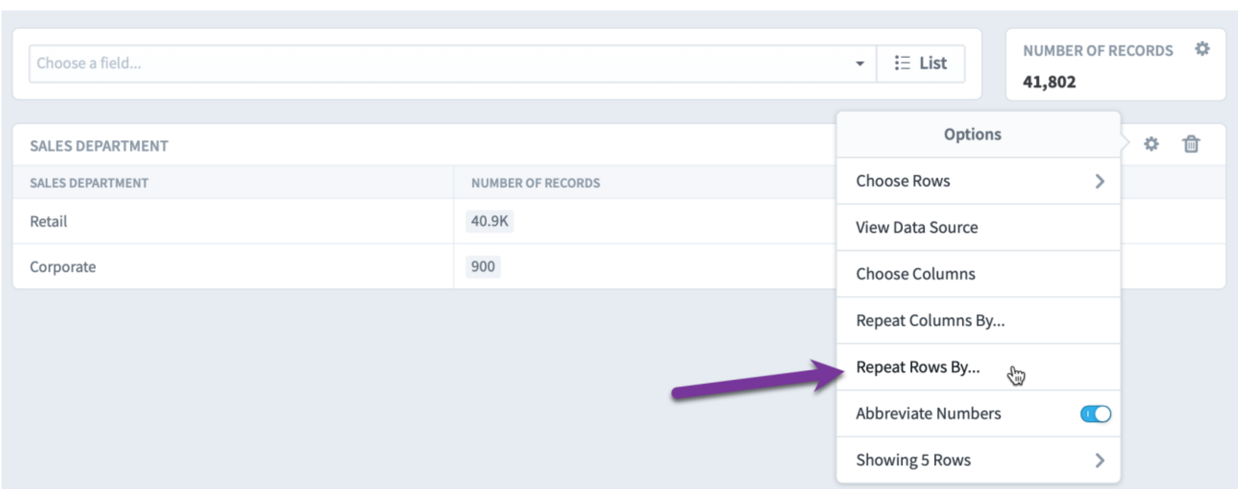


This is the new filter appearance.

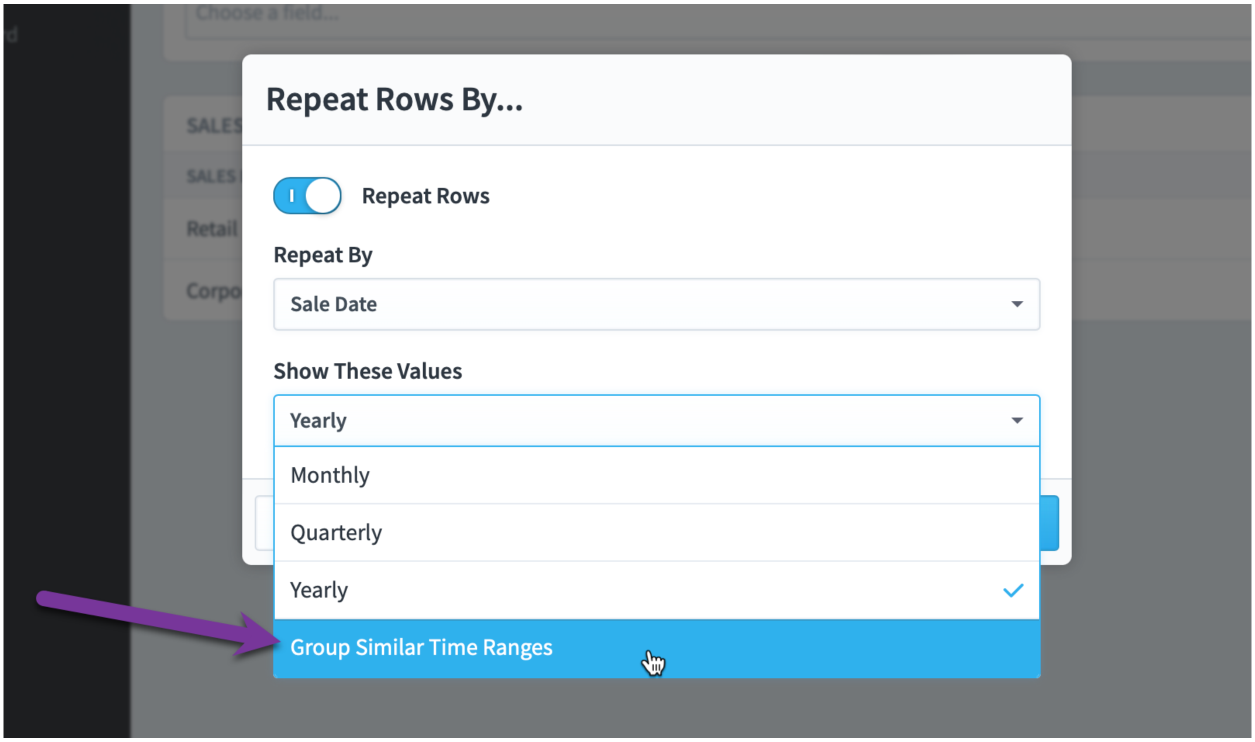


"Group Similar Time Ranges" for dataset tables

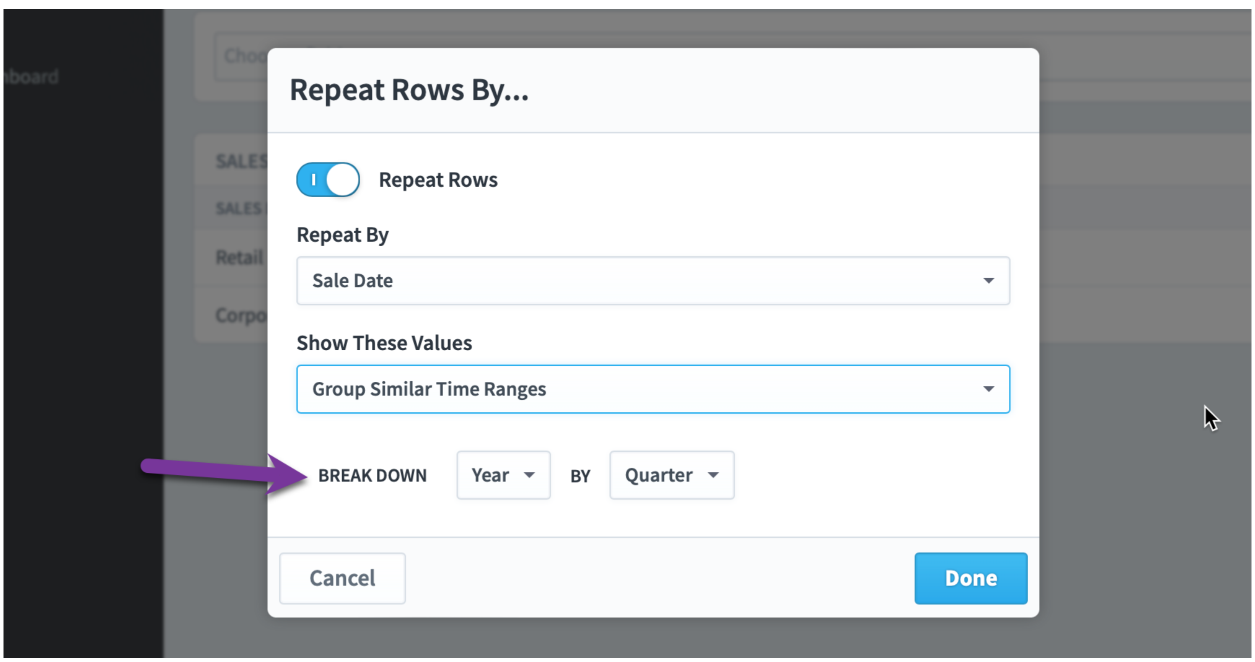
The flow for showing repeating values like "Day of the Week" and "Month of the Year" is now unified across all sections so that Datasets tables now matches Reports and Charts. As before, choose "Repeat Rows By…" or "Repeat Columns By…" for a dataset table.



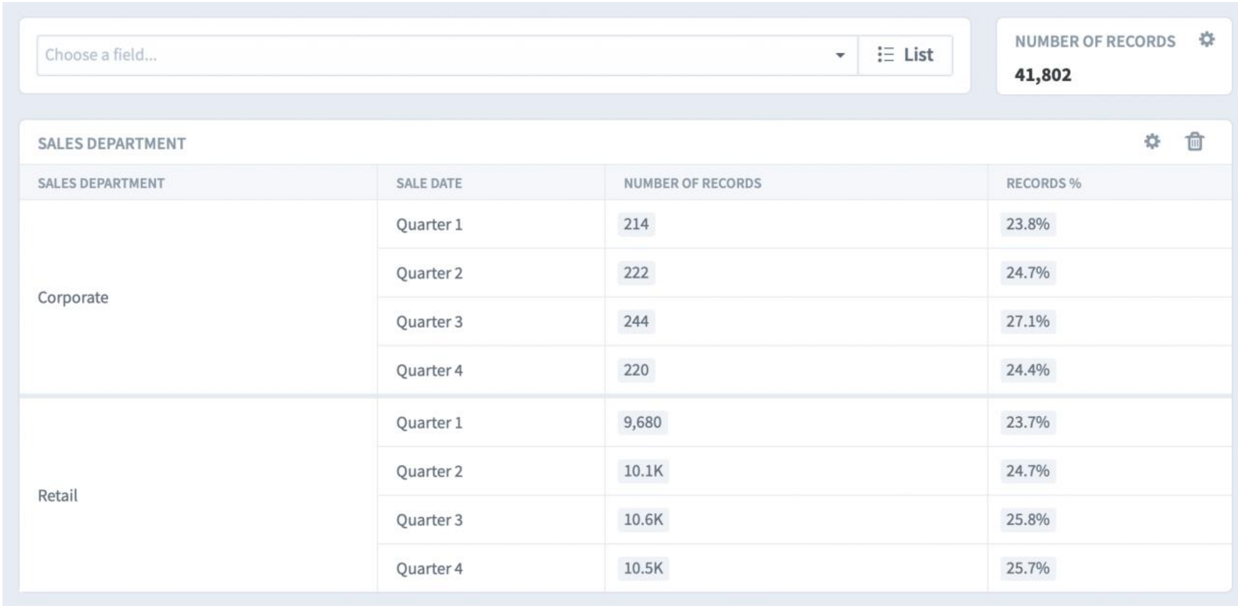
Instead of showing built-in options like "Day of the Week", the dropdown now shows "Group Similar Time Ranges".



This allows more choices for breakdown calendars. In this example we'll be repeating rows for every quarter of the year.

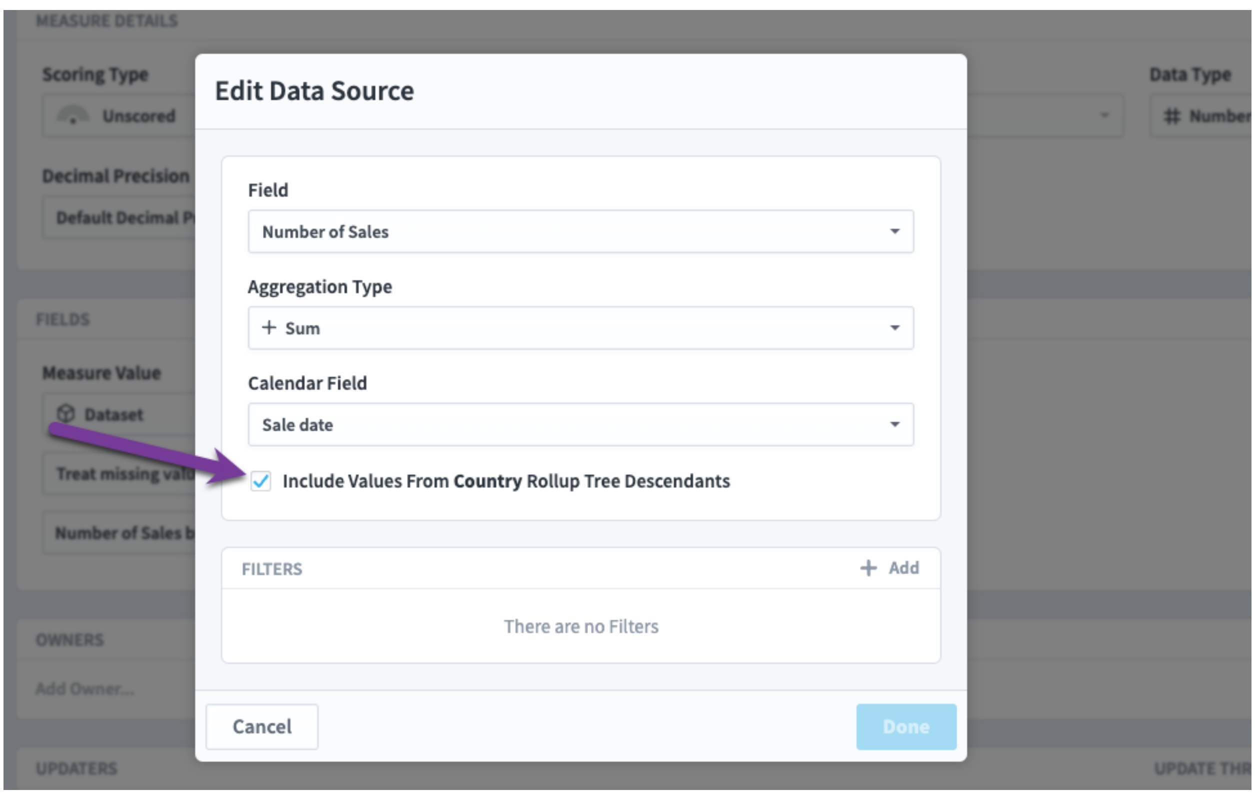


The result looks like this.

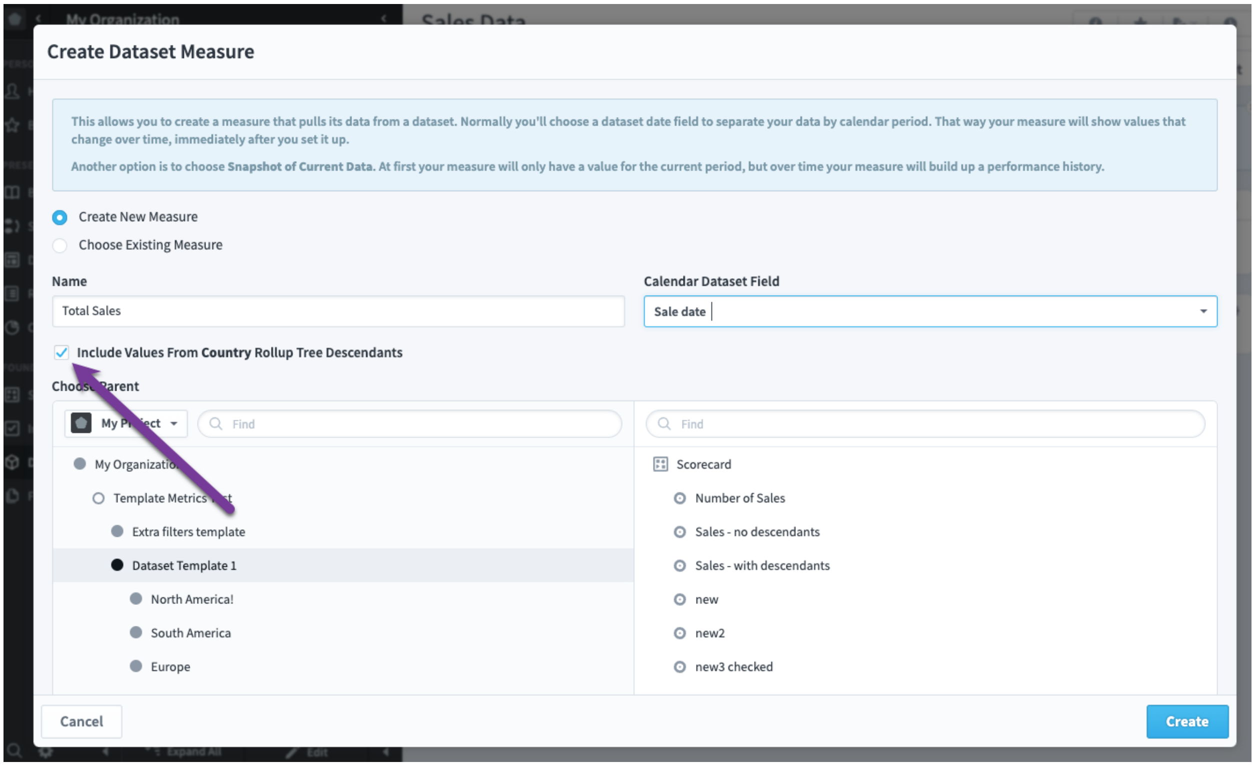


Including rollup tree descendants for dataset KPIs

When a dataset KPI is created inside a templated organization that is based on a dataset, there is now the option to control whether rollup tree descendants are included in the KPI's values. This "include values" checkbox appears when editing the KPI:

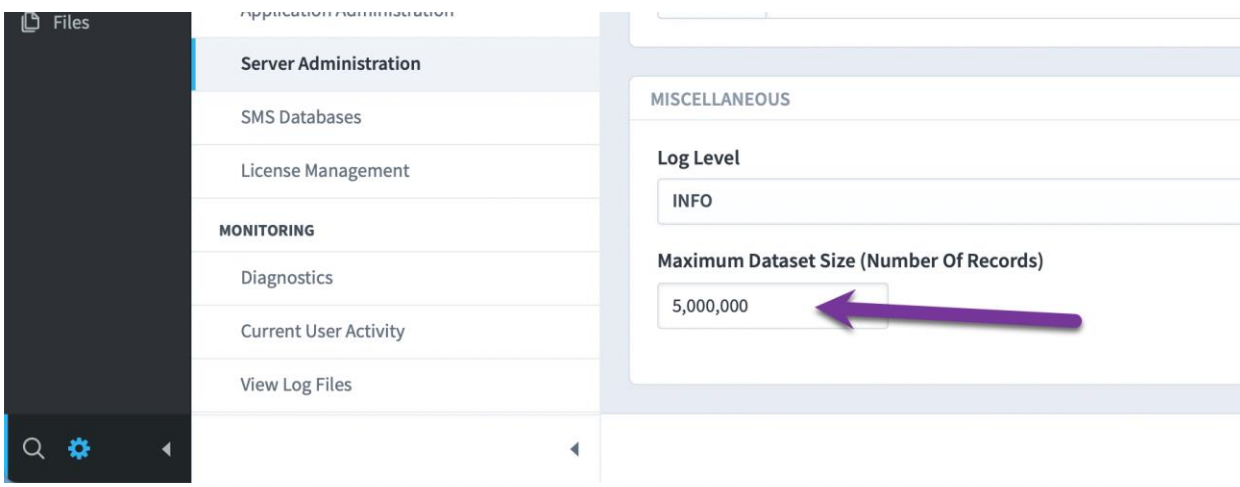


And it appears when creating a new KPI.



Ability to limit dataset size

Server administrators can now limit the maximum number of records in a dataset.



Improved linked dataset performance and results

Version 5.5 includes a significant overhaul in the way dataset values are calculated for linked datasets. Not only does this improve performance in most situations, but it eliminates the concept of a starting dataset, and removes the need to insert blank records into rollup tree datasets.

Improvements to dataset rebuilding

There are several new changes to how datasets are rebuilt that make it significantly easier for multiple people to manage multiple large datasets.

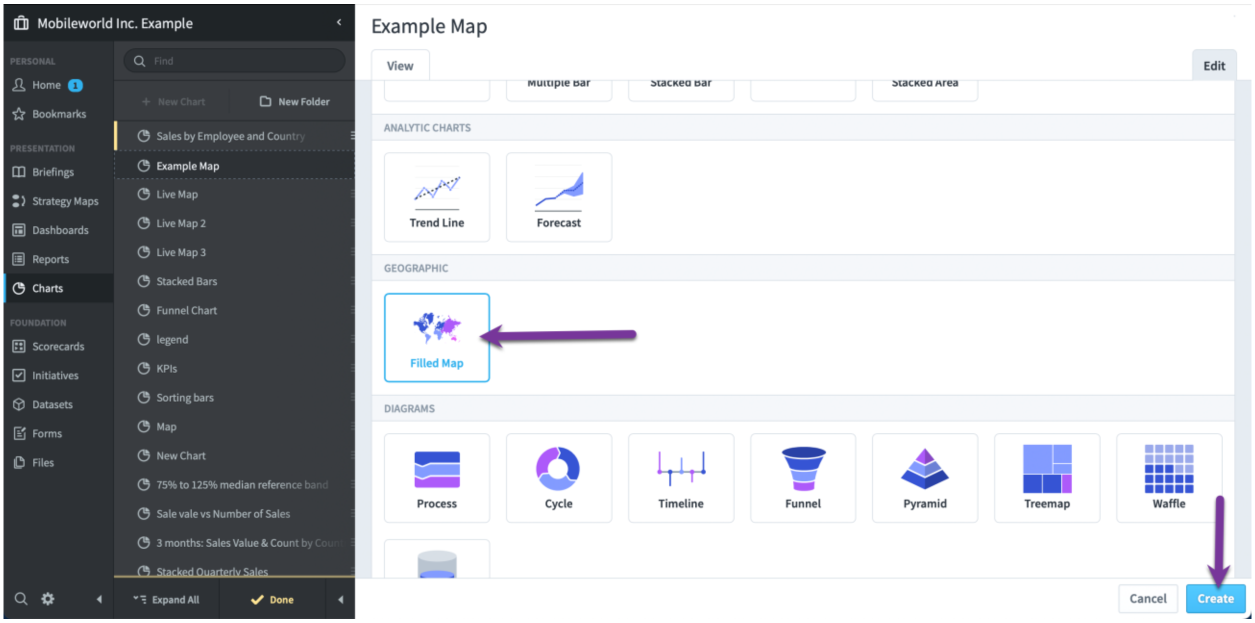
- Many types of changes to datasets no longer require any type of rebuilding.
- Linked datasets that are unaffected by newly imported data are no longer rebuilt.
- Smaller datasets are now built before larger datasets, allowing more efficient use of the background rebuilding queue.
- Recently used cached data is now recomputed immediately after dataset rebuilding rather than waiting for users to request the data.

Charts

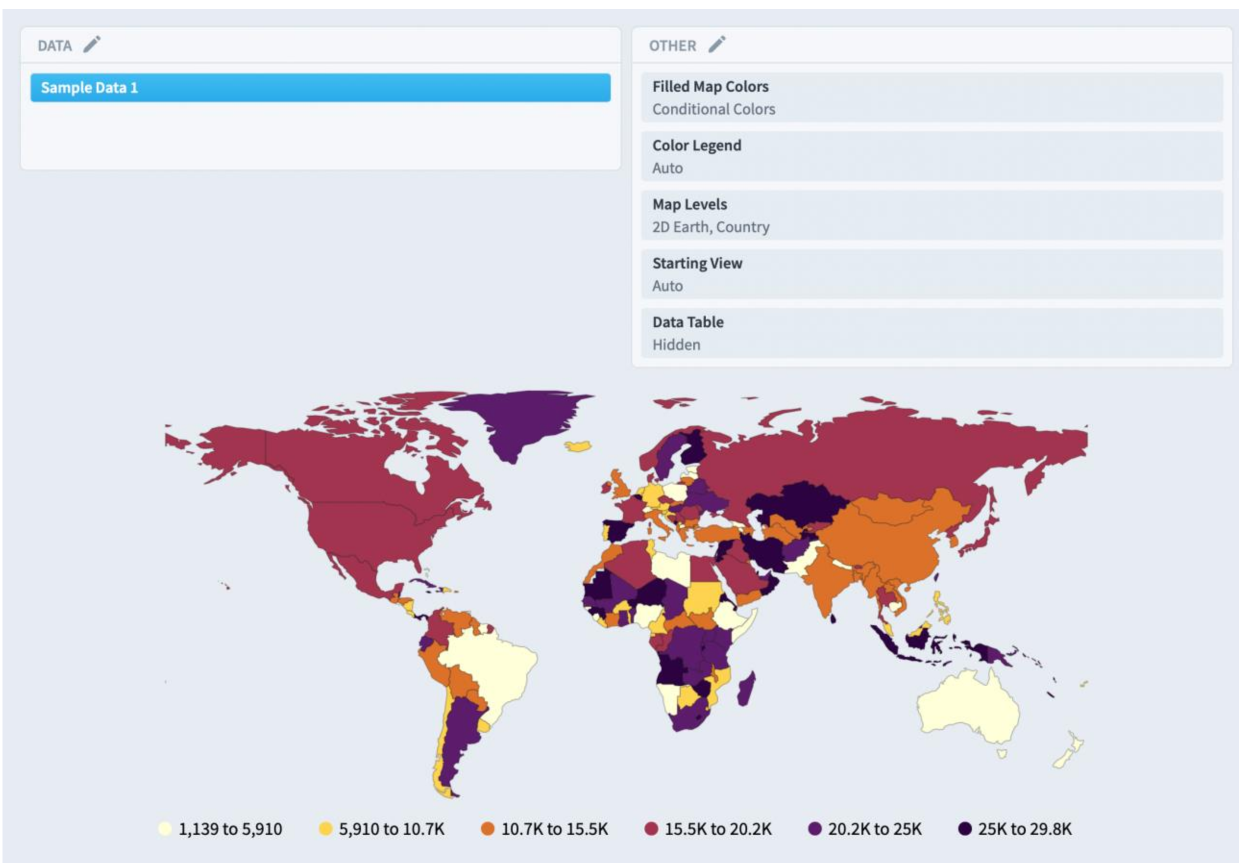
Filled geographic maps

Creating a map

You can now create interactive geographic maps in the Charts section that visualize your geographic datasets data.

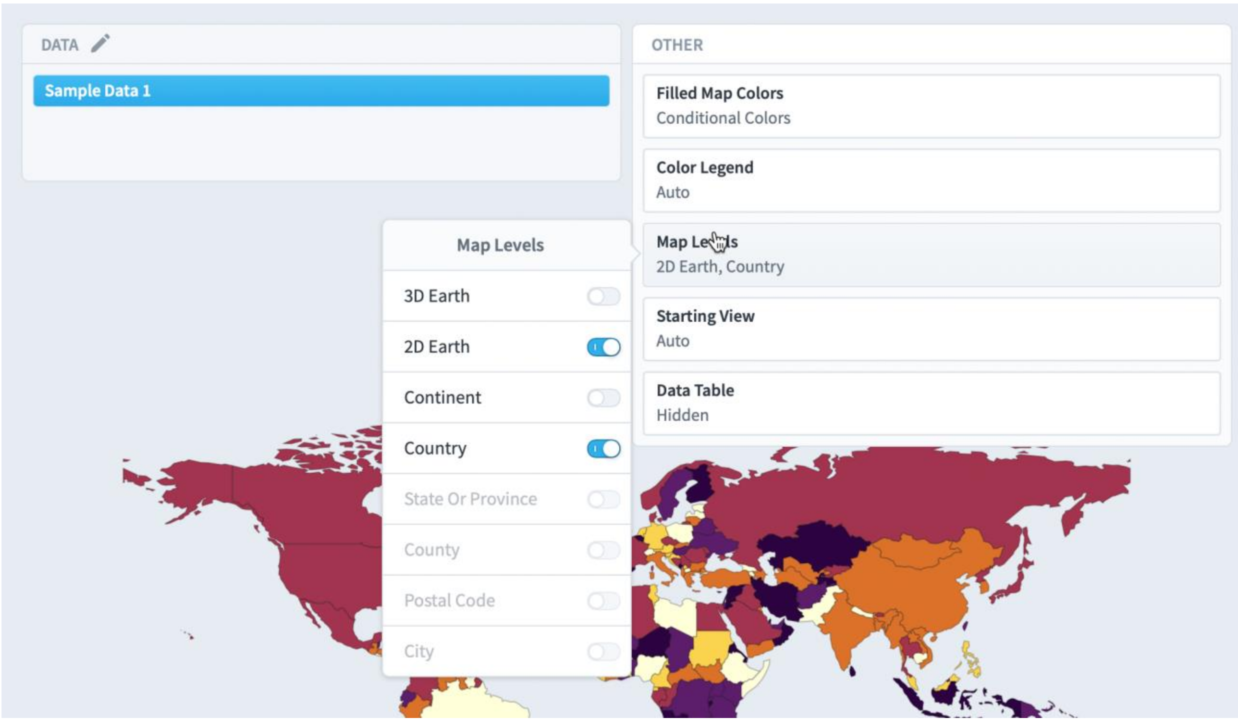


When you choose "Filled Map" for your new chart type, Spider Impact creates a map with sample data. This sample data is the same as every other chart type, and it allows you to explore the functionality without needing to hook it up to data first.

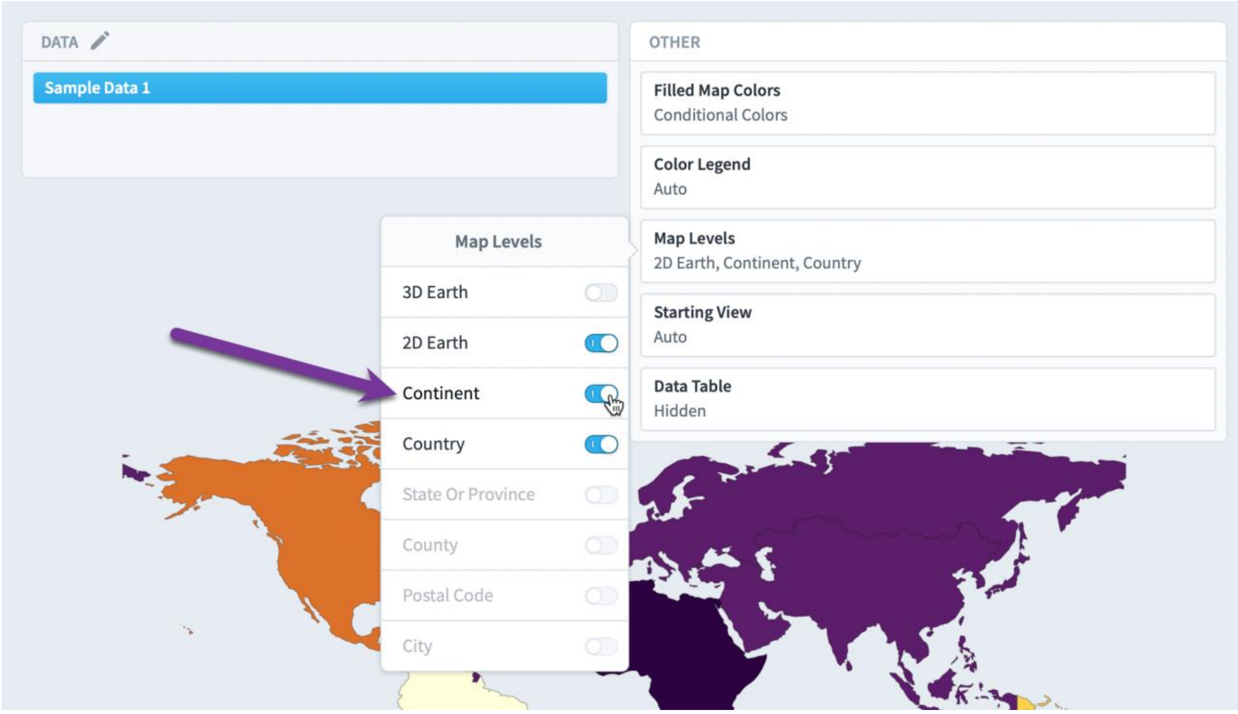


Map levels

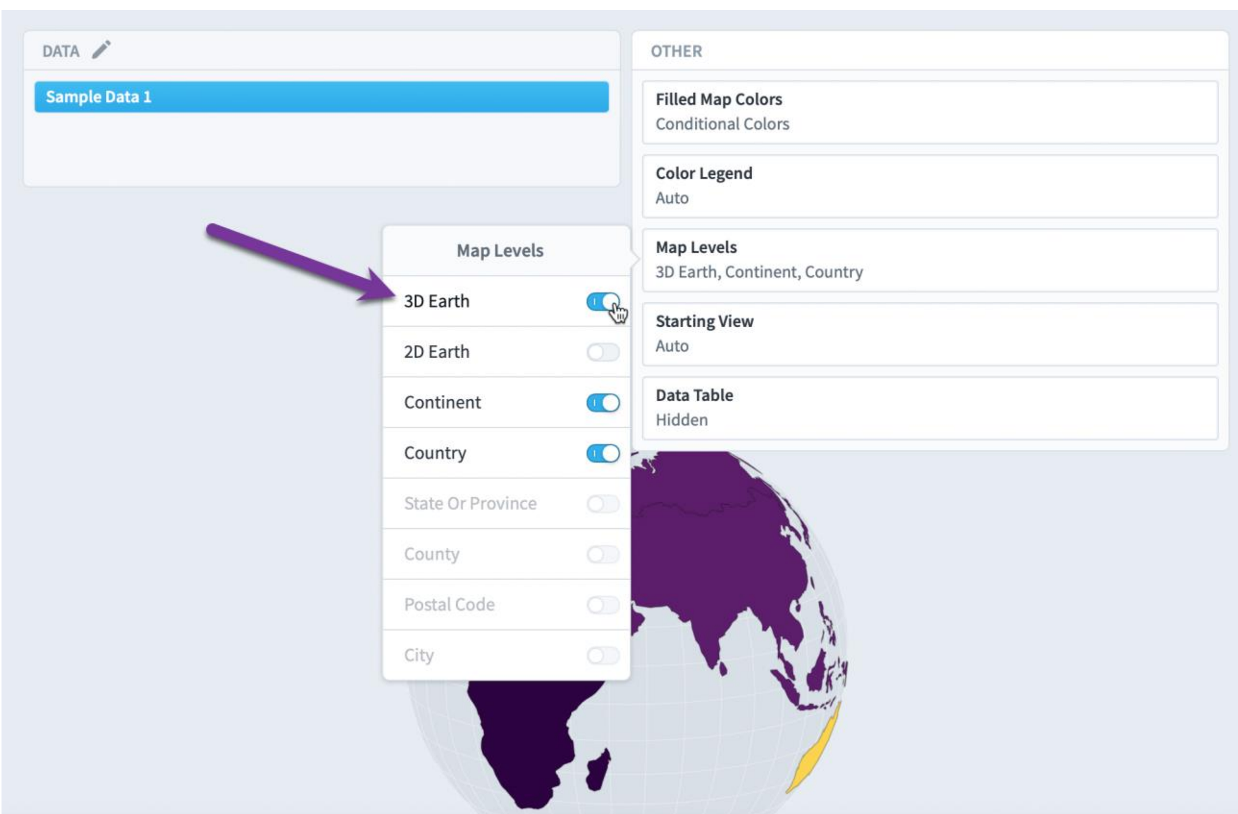
Maps show data from datasets that have geographic fields. The sample data shown by default is made-up numbers for every country. When you click “Map Levels” you can choose which levels of the geographic hierarchy you want to show on your map. Here we’re seeing 2D Earth broken into countries because those are the two levels that are turned on.



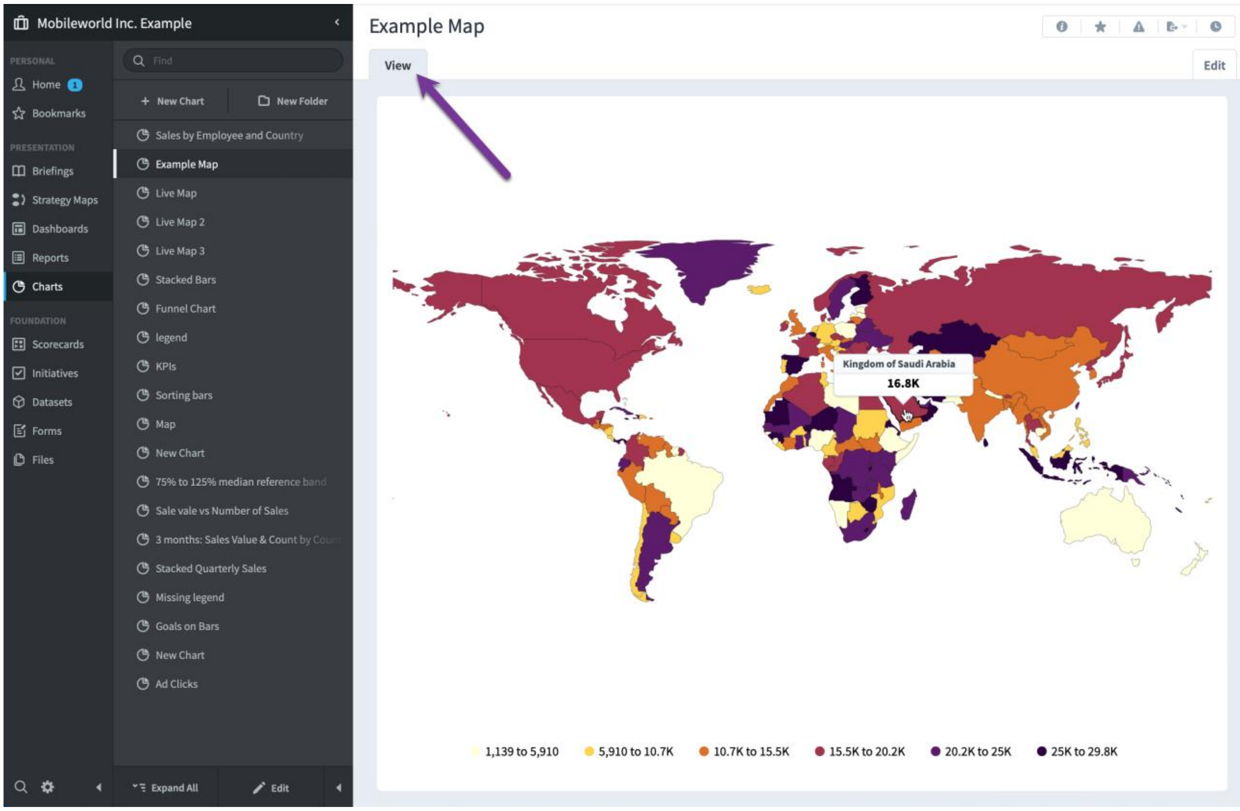
This is what it looks like when you turn on the Continent level. Our starting view is now the 2D Earth view broken into continents because those are the two highest levels that are turned on.



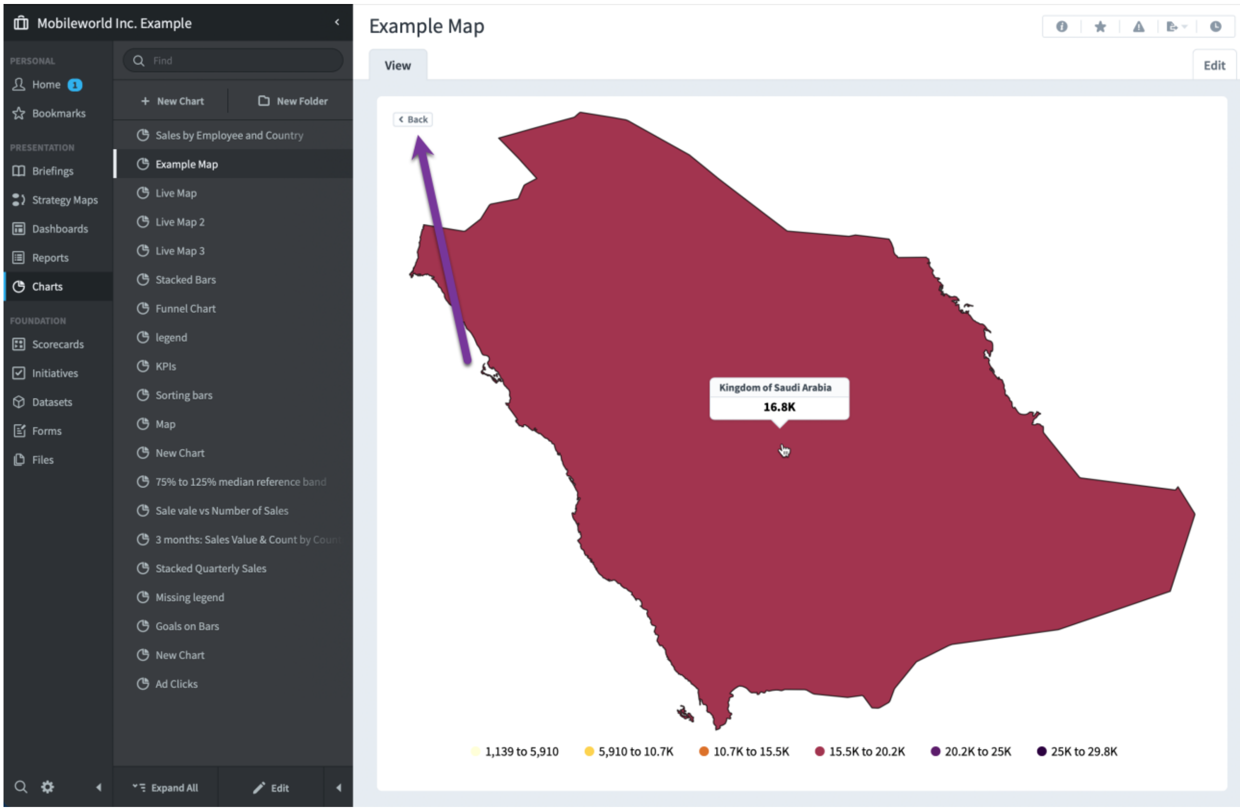
Next, we'll turn on the 3D Earth level. You can't have both 2D and 3D Earth, so the 2D Earth level automatically turns off. We can now see a 3D globe that slowly rotates on its own until you interact with it.



When you go to the Charts View tab, the map automatically resizes to fit available space. You can hover the mouse over a region to see its value in a tooltip.

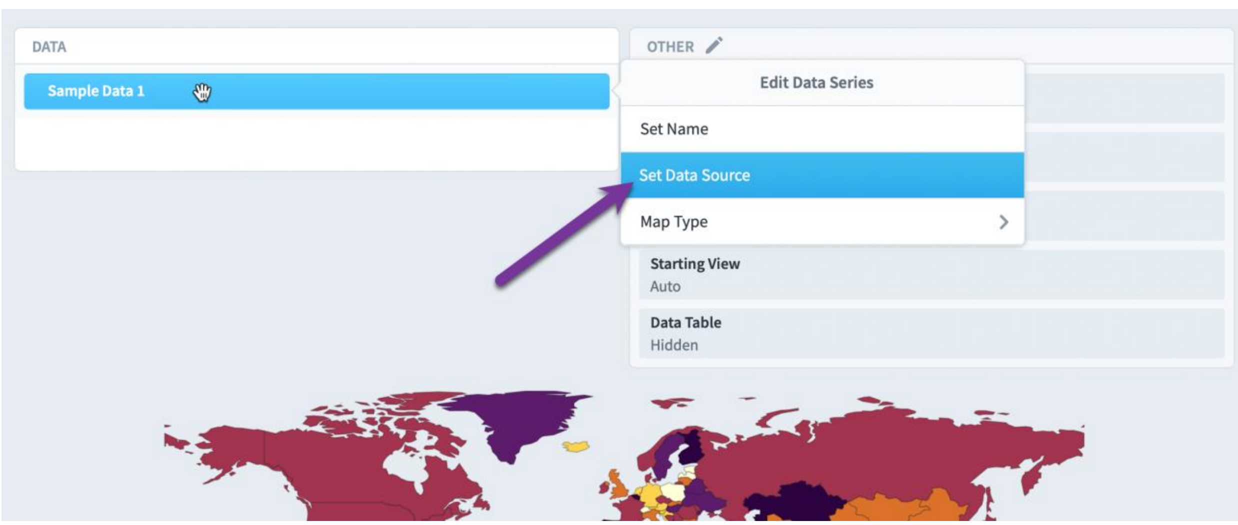


When you click on a region, you'll see a zooming animation and then that region in more detail. This Country level is the lowest map level we have enabled, so we can't drill down any further. You can click the Back button to zoom out to the world map.

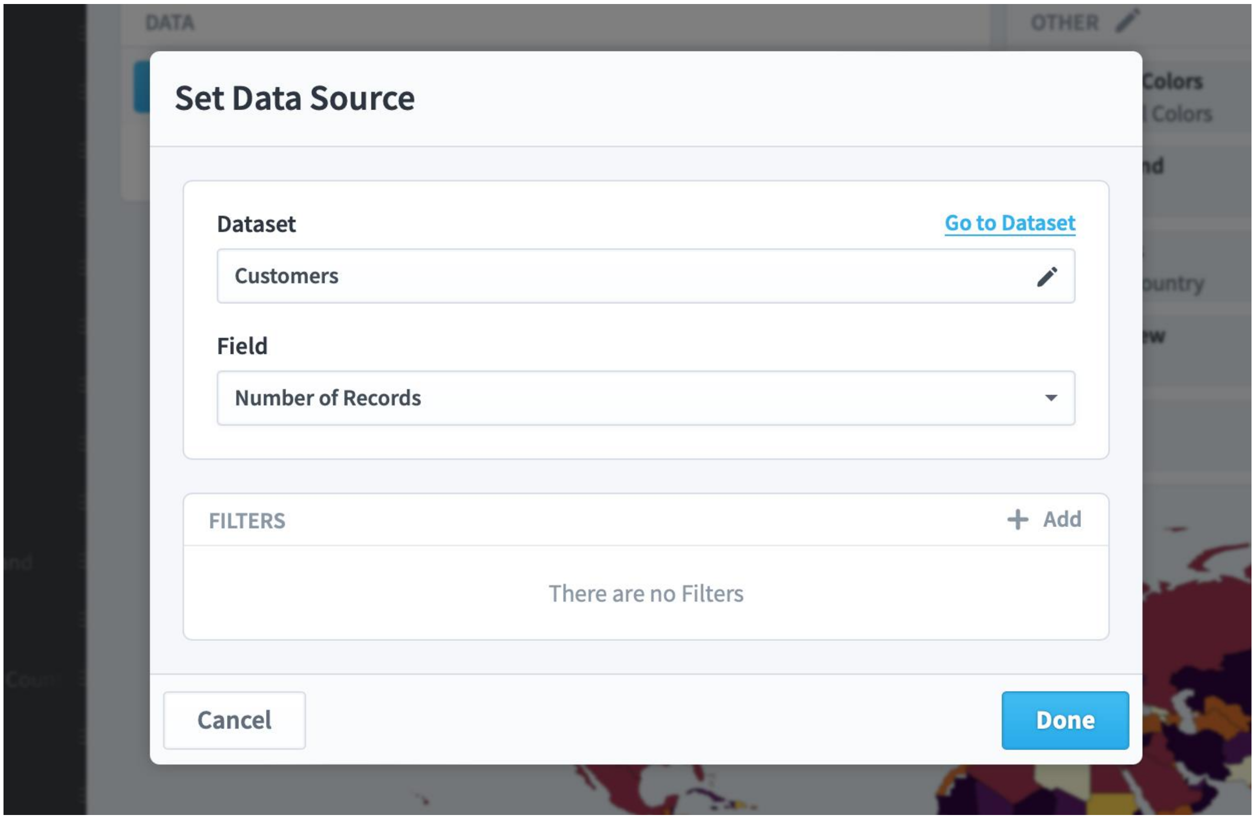


Map data

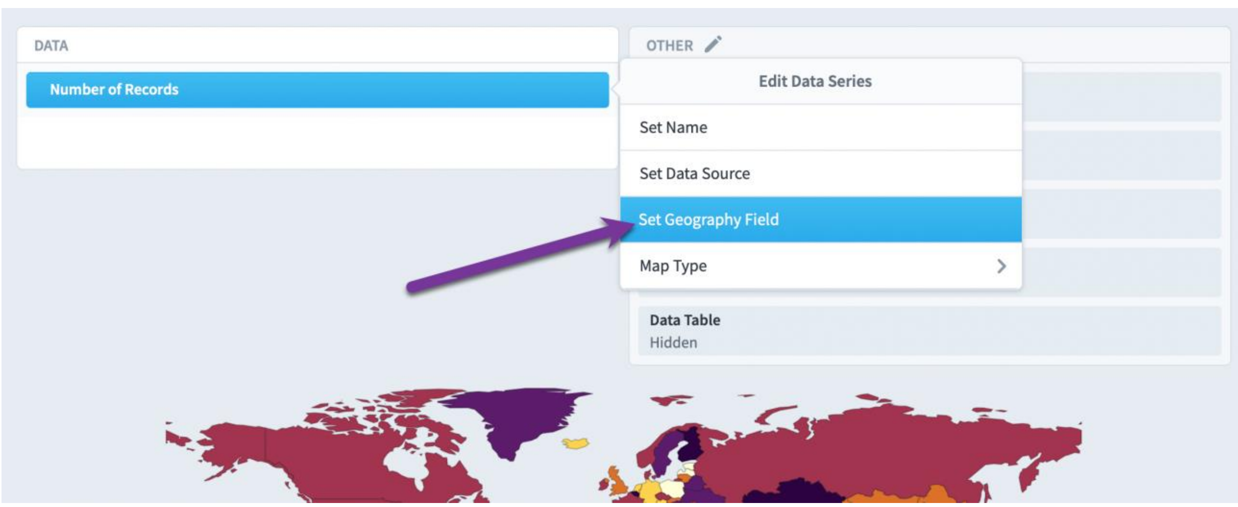
To show your real data on a map you need to first choose Set Data Source in the Data menu.



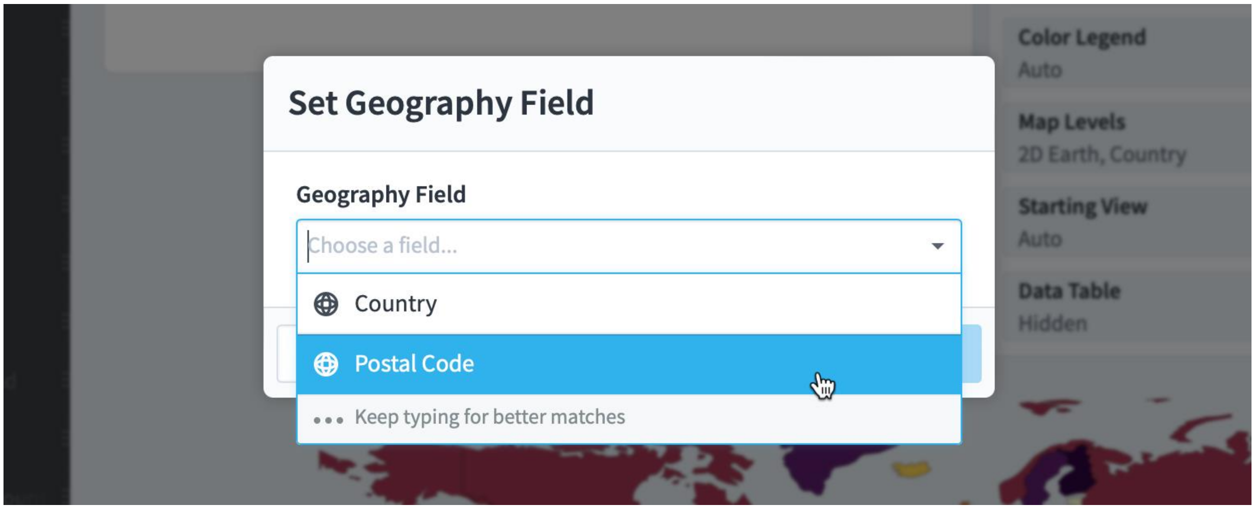
The data we're choosing here is what numbers and colors you want to show up for each map region. In this example we're going to choose the Customers dataset and "Number of Records" for the field. That means our chart numbers and colors are going to be the number of customers in each region.



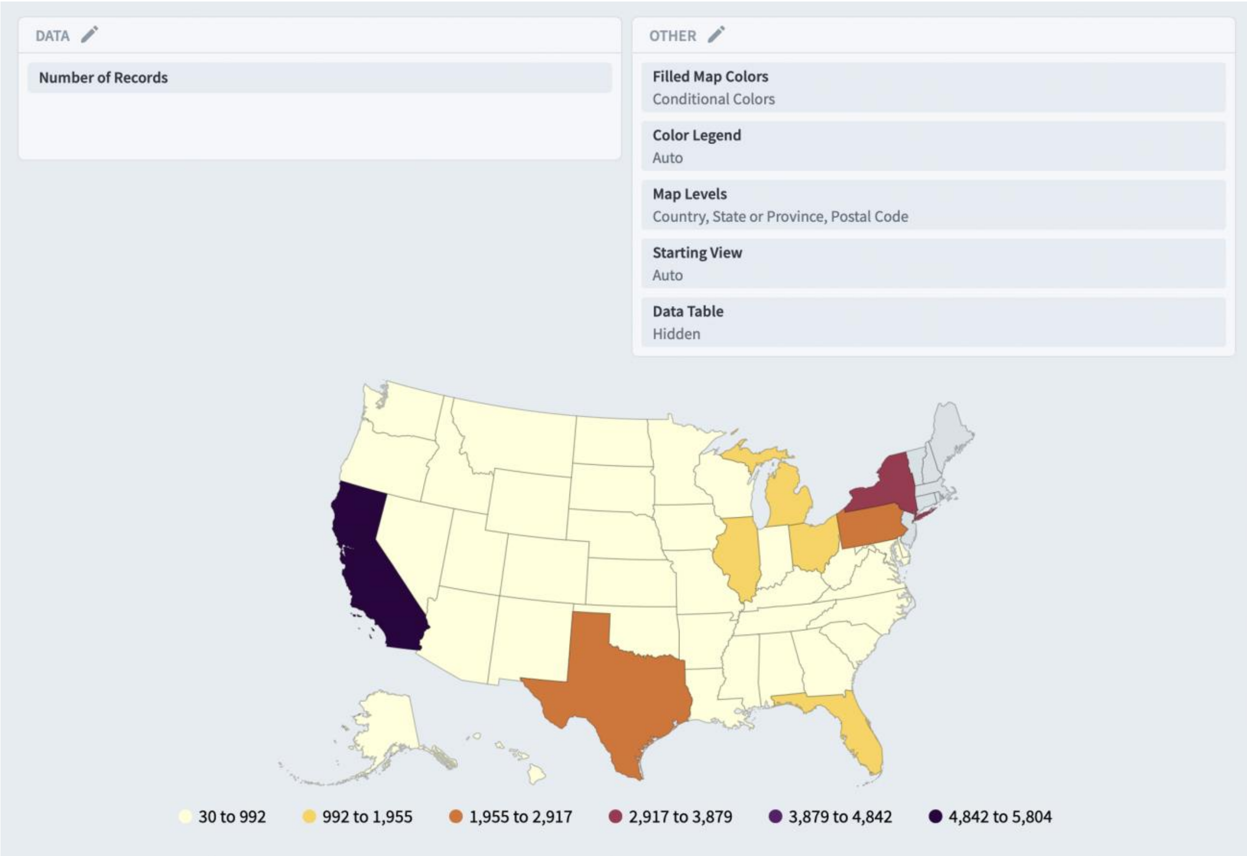
Next we need to choose a geography field in the Customers dataset.



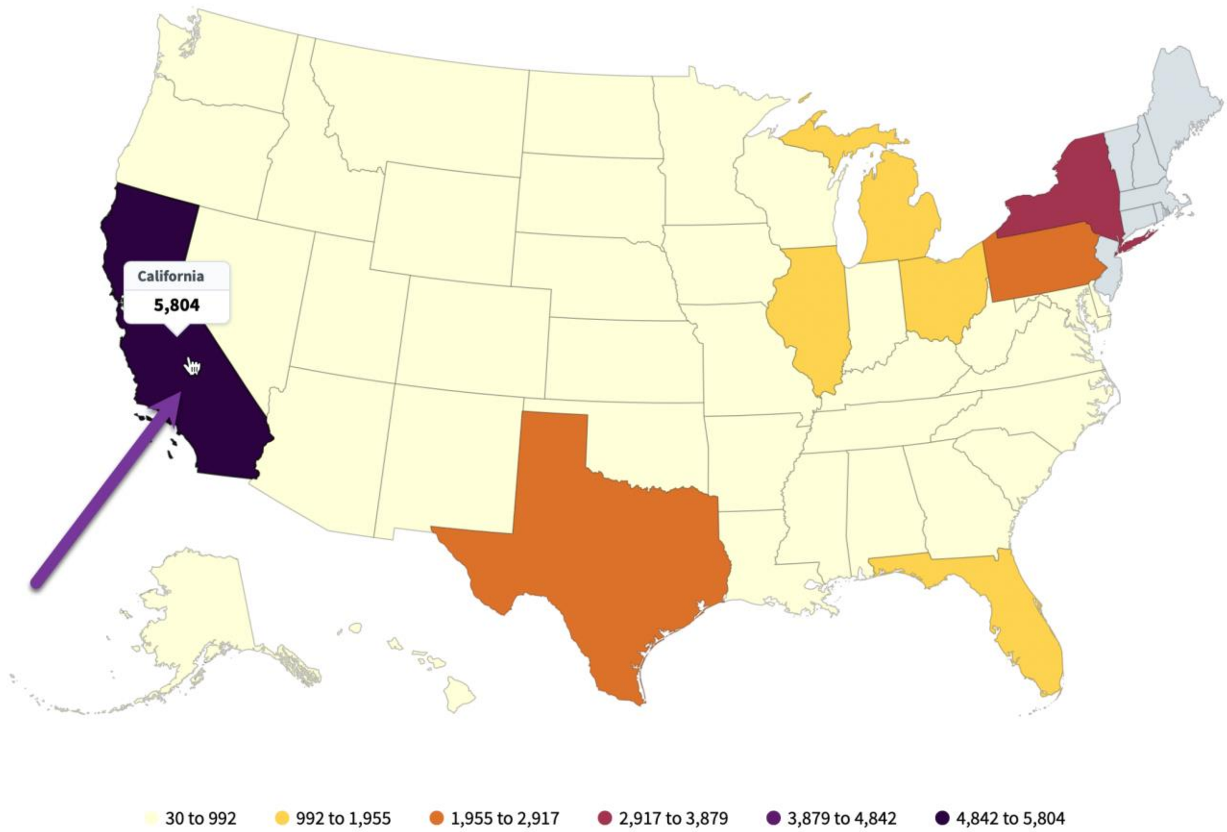
In this example we'll choose the Postal Code field.



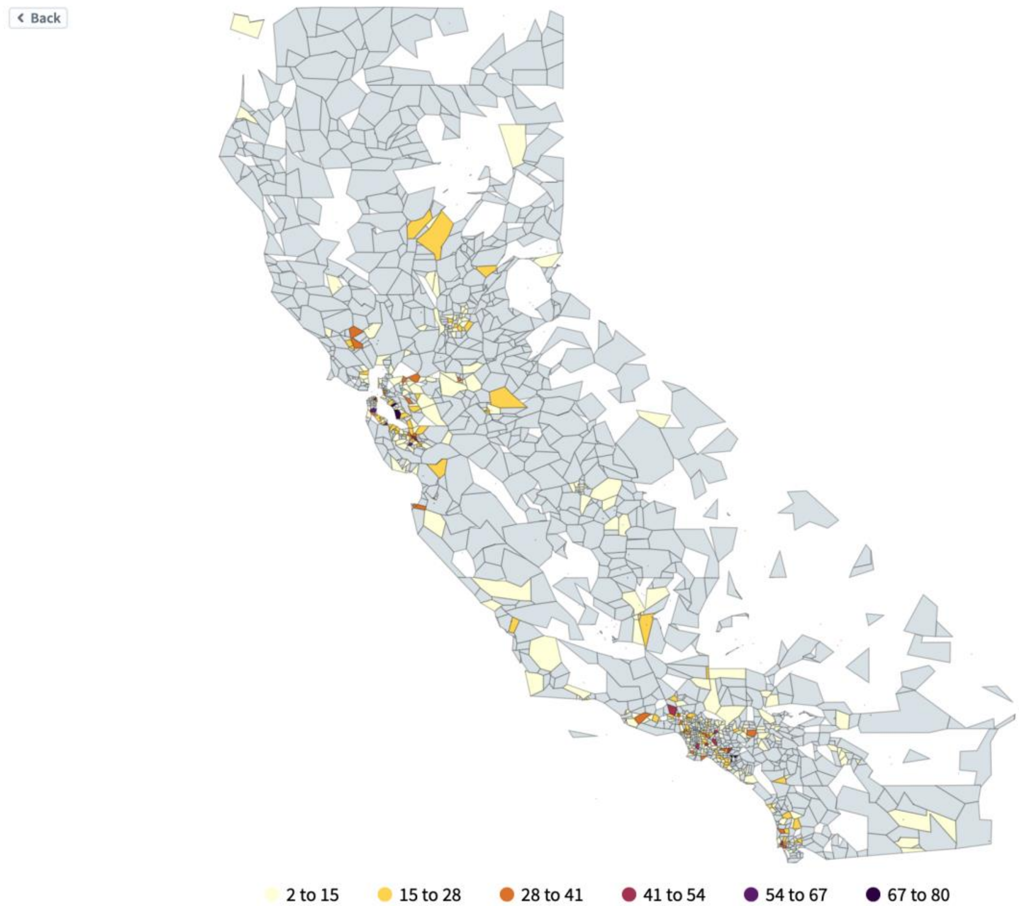
The map is now colored by the number of customers in each region.



When we change to the Charts View tab and hover over California, we can see that we have 5,804 customers there.

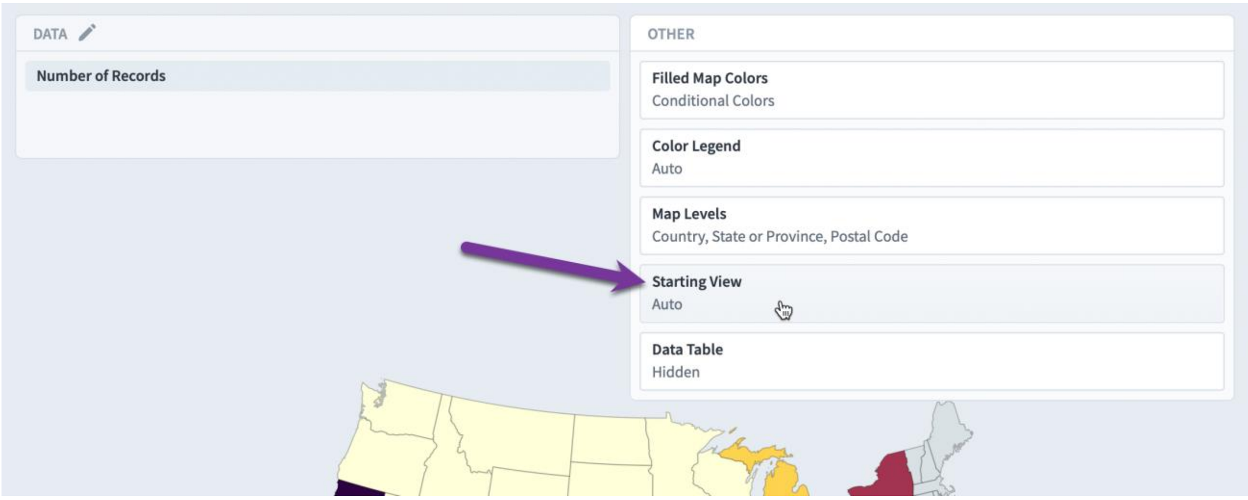


Clicking on California zooms to the state level and now colors the postal codes. This example shows how postal codes don't always completely cover a state, especially in rural areas.

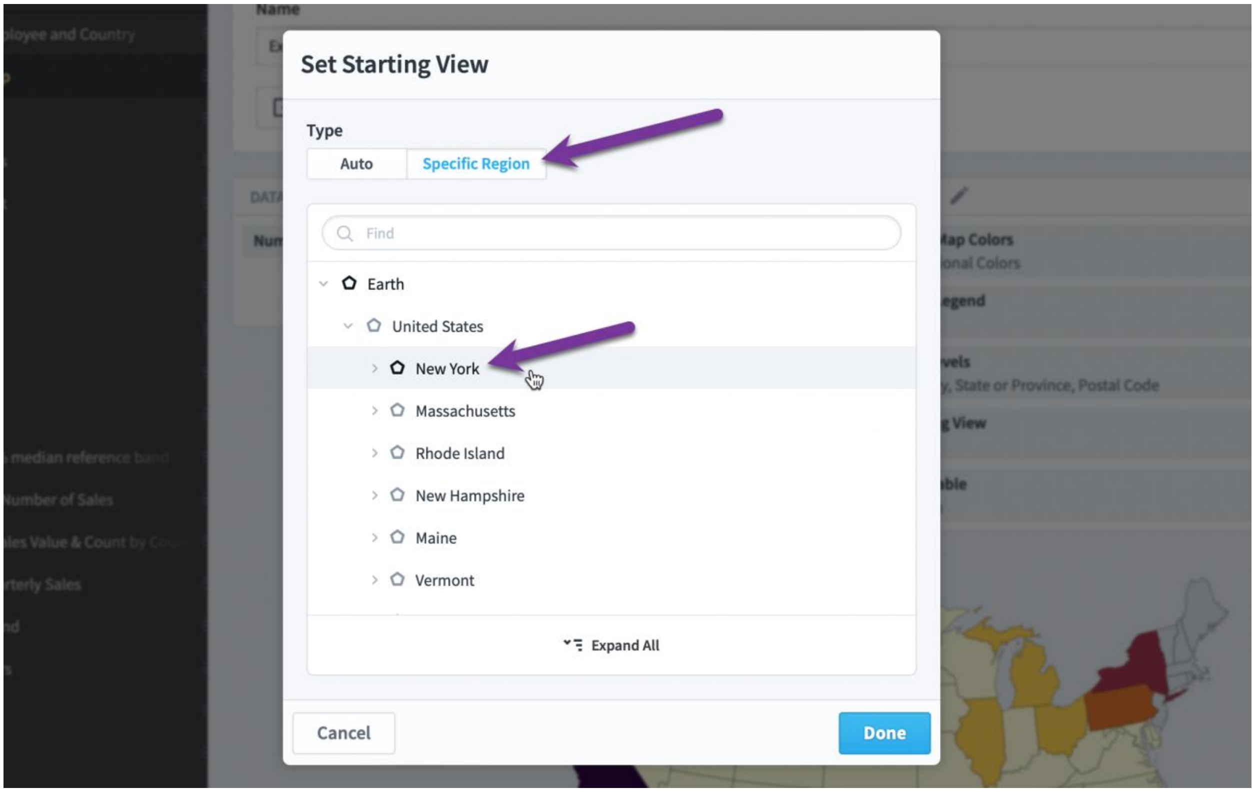


Starting view

The Starting View for maps is Auto by default. That means it starts showing the lowest map region that contains all of the data. In the customers example above, the view automatically started at the United States because all of the records in the Customers dataset were in the US.



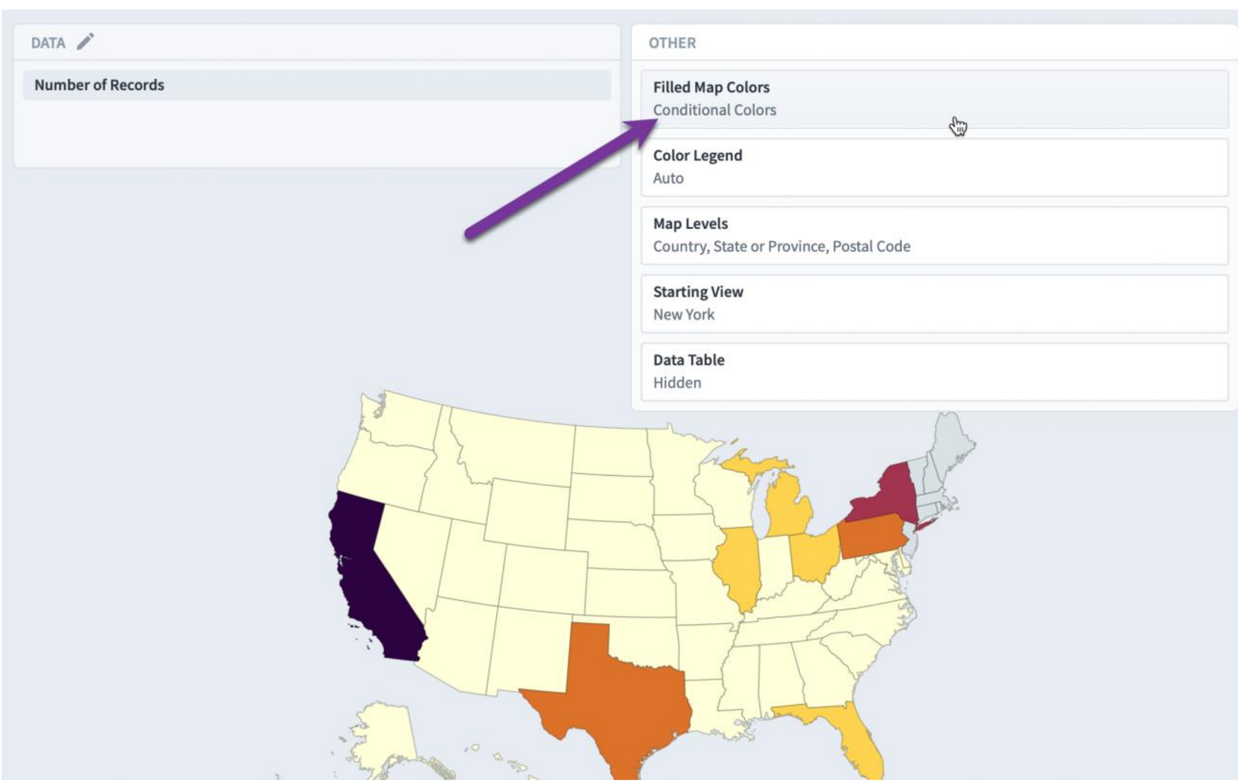
You can choose a specific region to start on, though. Here we're choosing the US state of New York as the starting view.



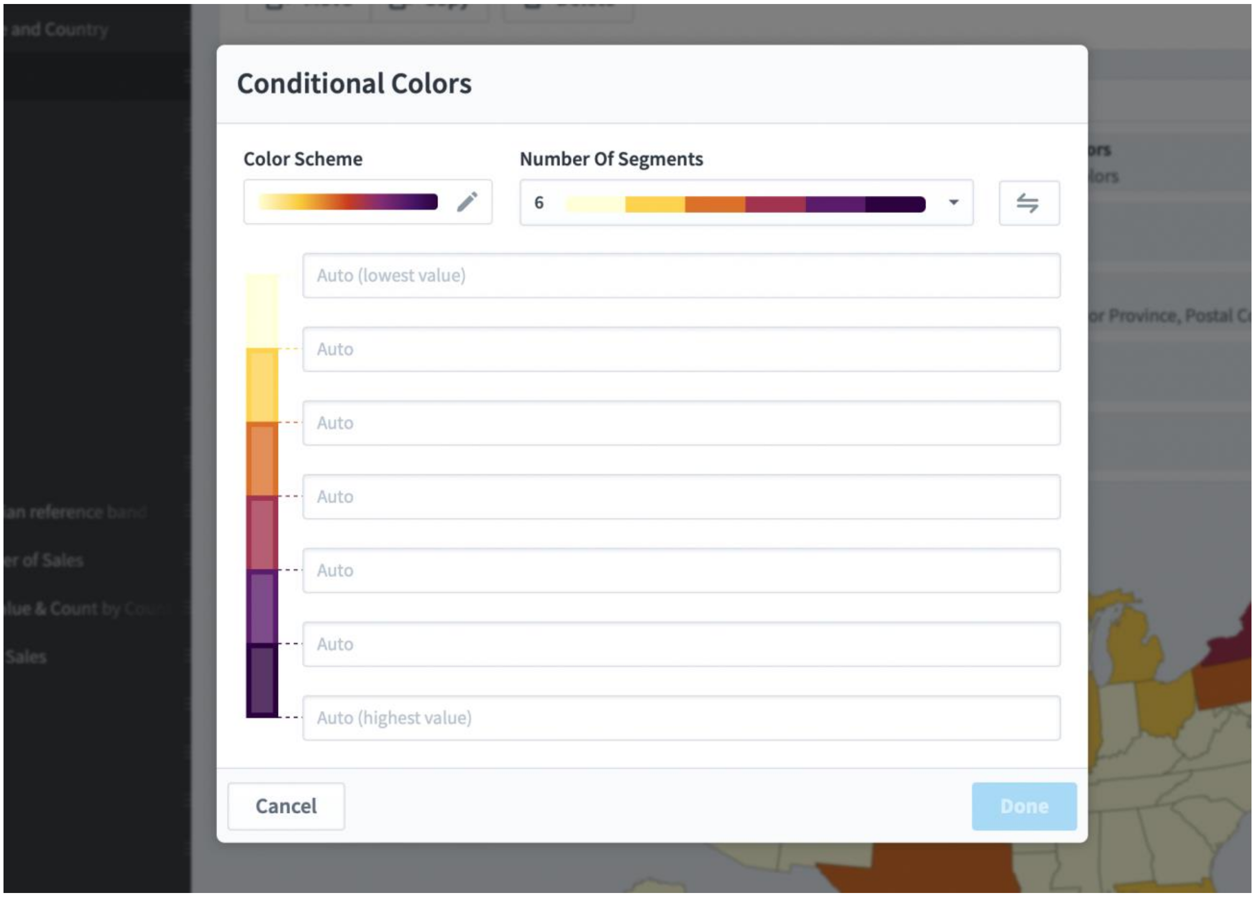
Now when we first view the chart we'll see all of the postal codes in New York. This map also has the Country level turned on, however, so there's a Back button to take us out to the country level.

Map colors

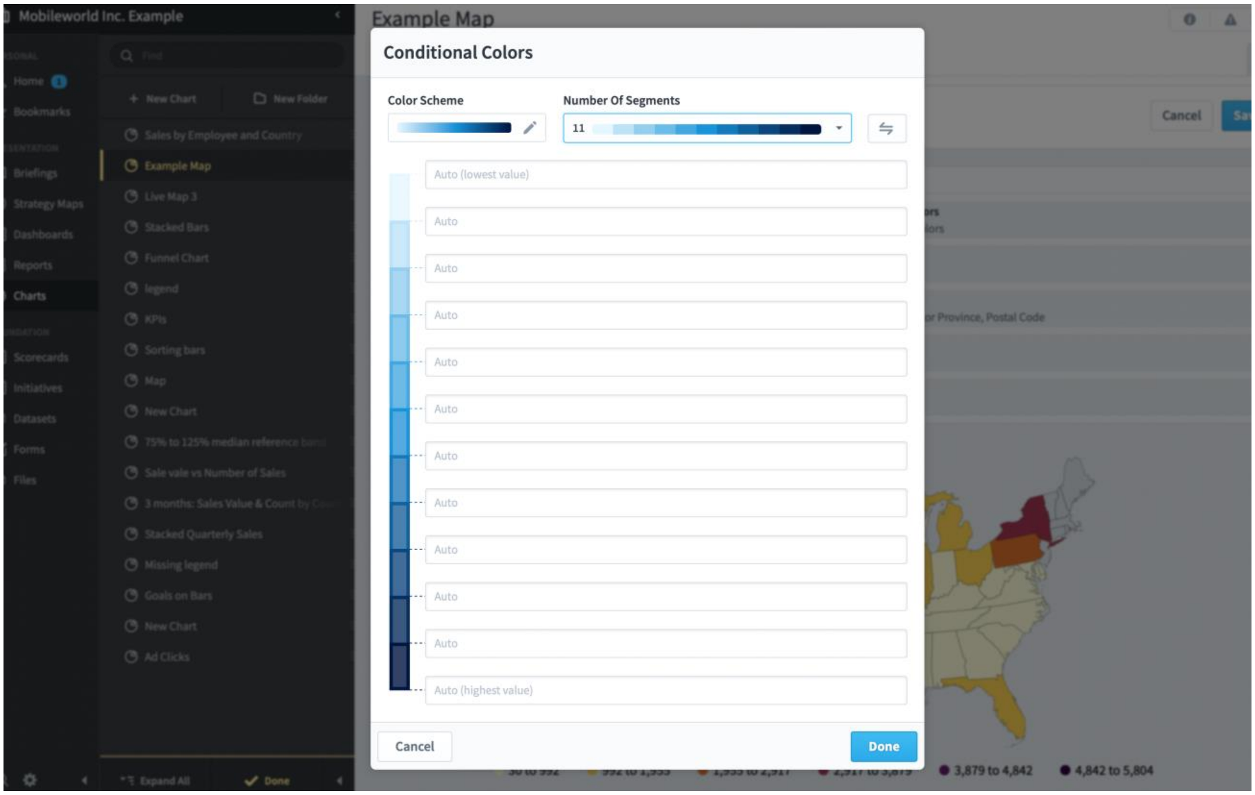
You can change the map's colors by choosing "Filled Map Colors" in the Other menu.



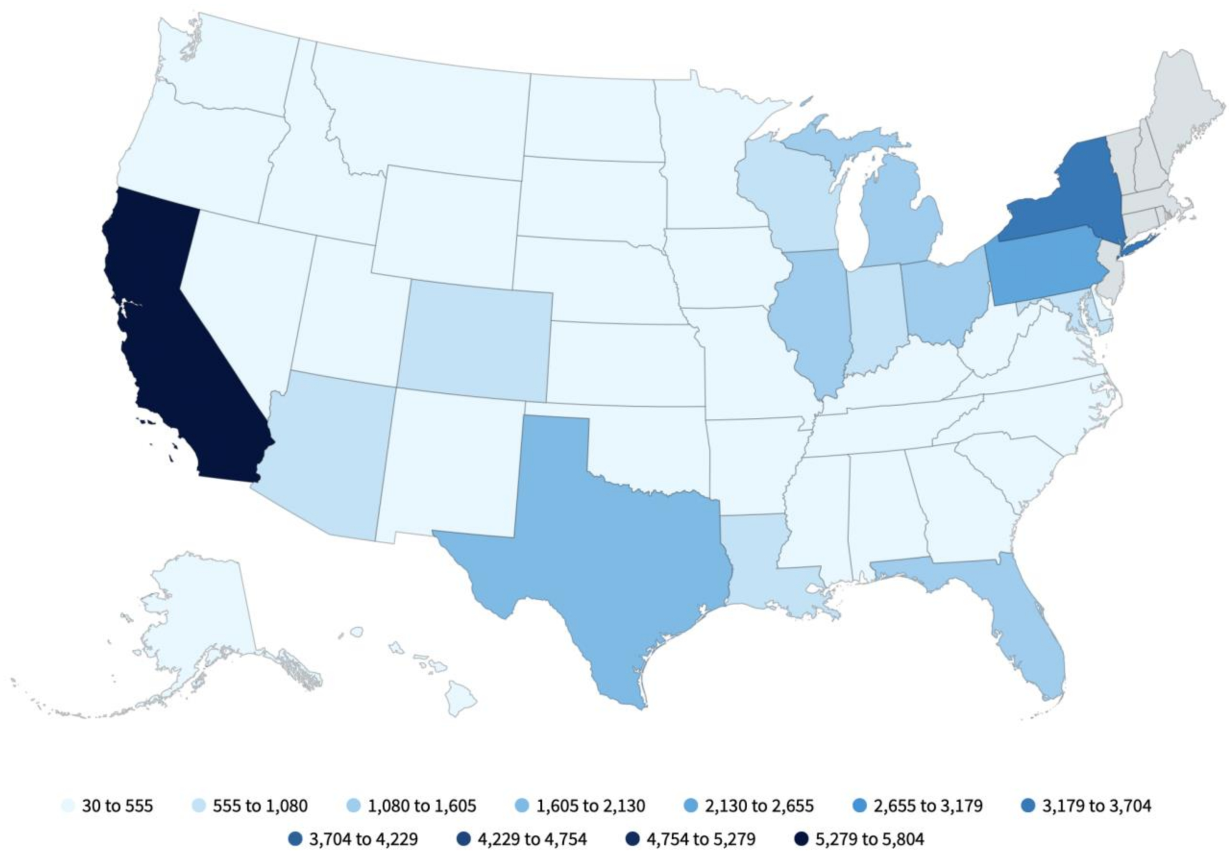
By default maps use a light yellow to dark purple gradient broken into 6 segments.



You can change the color scheme and number of segments, however, as well as manually set the thresholds between color segments.

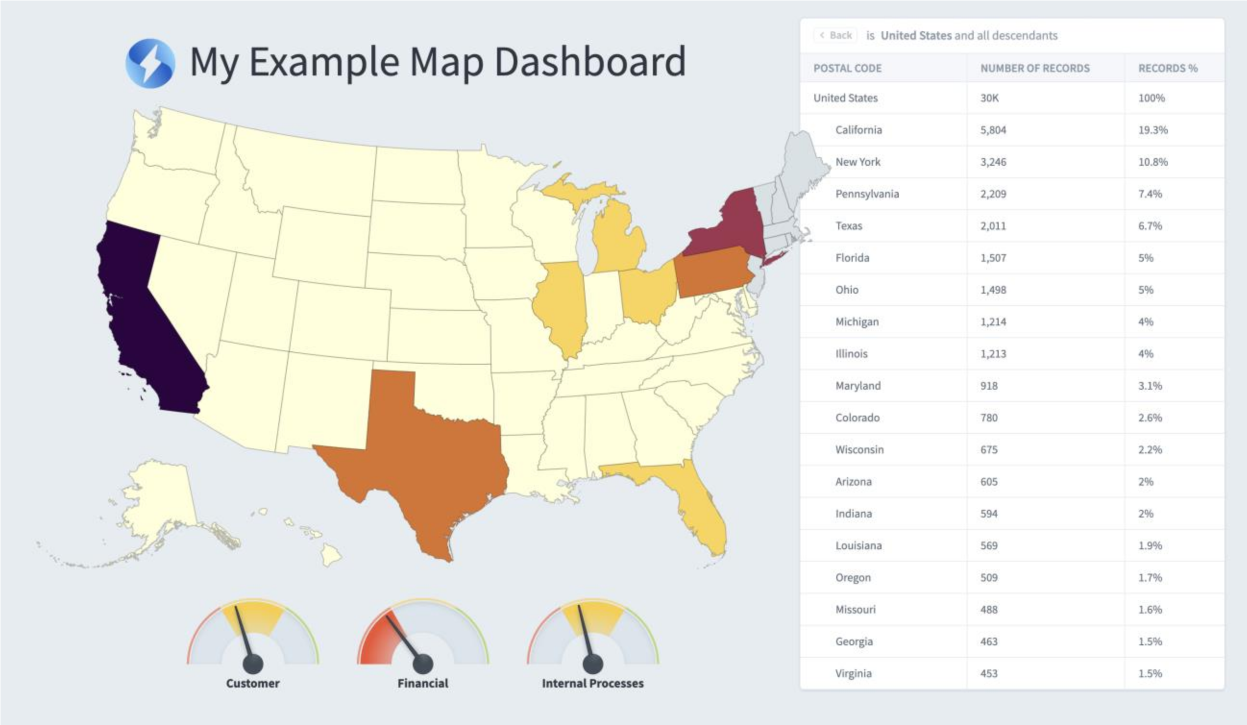


Here we're showing the number of customers in an 11-segment blue color scheme.



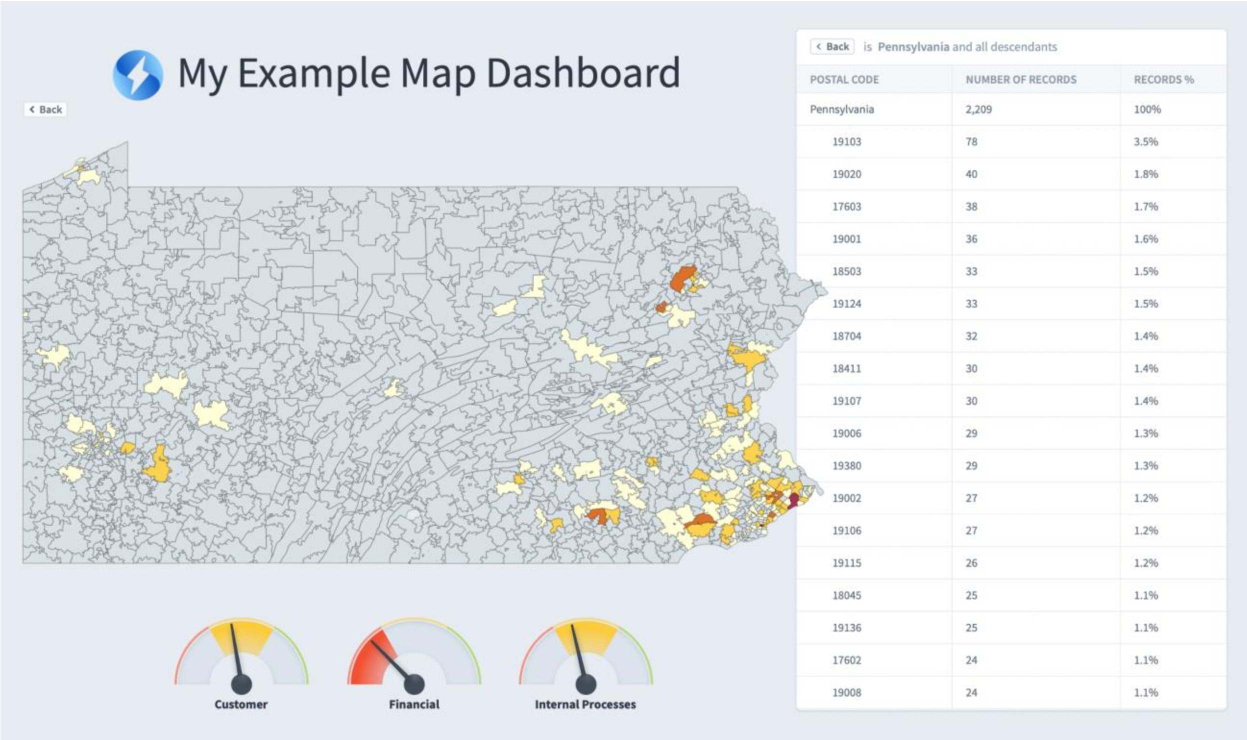
Maps on dashboards

Maps, like all types of charts, work great on dashboards. Here we're showing our customer map with speedometers and a dataset table widget.



POSTAL CODE	NUMBER OF RECORDS	RECORDS %
United States	30K	100%
California	5,804	19.3%
New York	3,246	10.8%
Pennsylvania	2,209	7.4%
Texas	2,011	6.7%
Florida	1,507	5%
Ohio	1,498	5%
Michigan	1,214	4%
Illinois	1,213	4%
Maryland	918	3.1%
Colorado	780	2.6%
Wisconsin	675	2.2%
Arizona	605	2%
Indiana	594	2%
Louisiana	569	1.9%
Oregon	509	1.7%
Missouri	488	1.6%
Georgia	463	1.5%
Virginia	453	1.5%

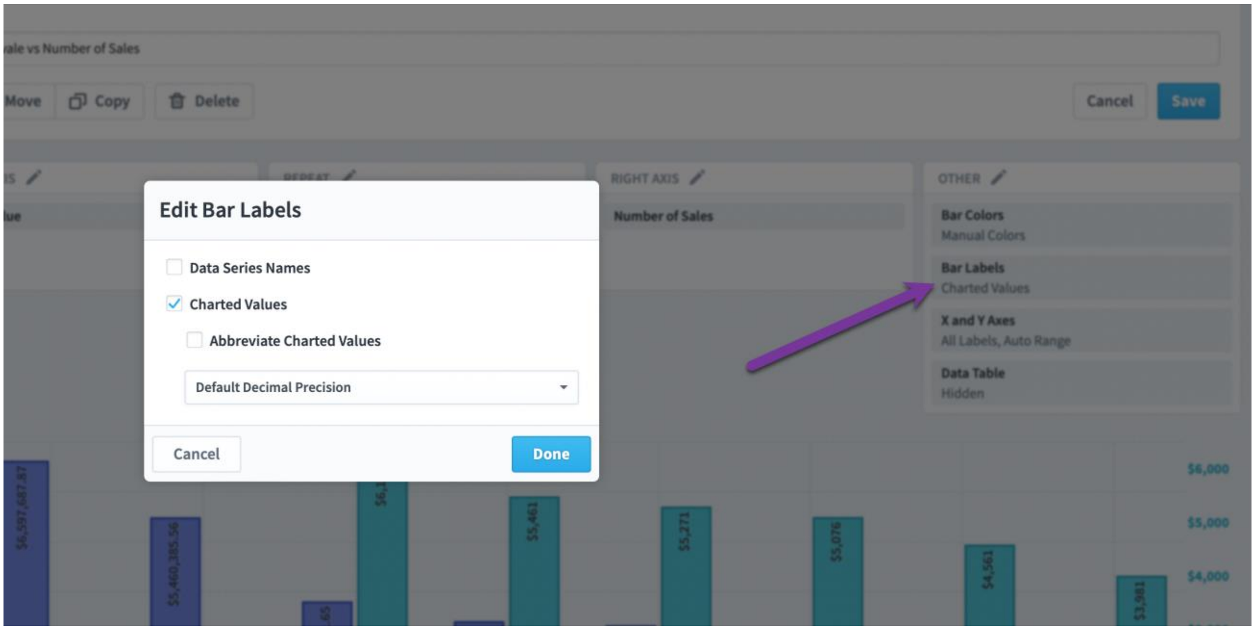
Clicking on either a map region or the dataset table widget will apply a dataset filter for that region to the entire dataset.



POSTAL CODE	NUMBER OF RECORDS	RECORDS %
Pennsylvania	2,209	100%
19103	78	3.5%
19020	40	1.8%
17603	38	1.7%
19001	36	1.6%
18503	33	1.5%
19124	33	1.5%
18704	32	1.4%
18411	30	1.4%
19107	30	1.4%
19006	29	1.3%
19380	29	1.3%
19002	27	1.2%
19106	27	1.2%
19115	26	1.2%
18045	25	1.1%
19136	25	1.1%
17602	24	1.1%
19008	24	1.1%

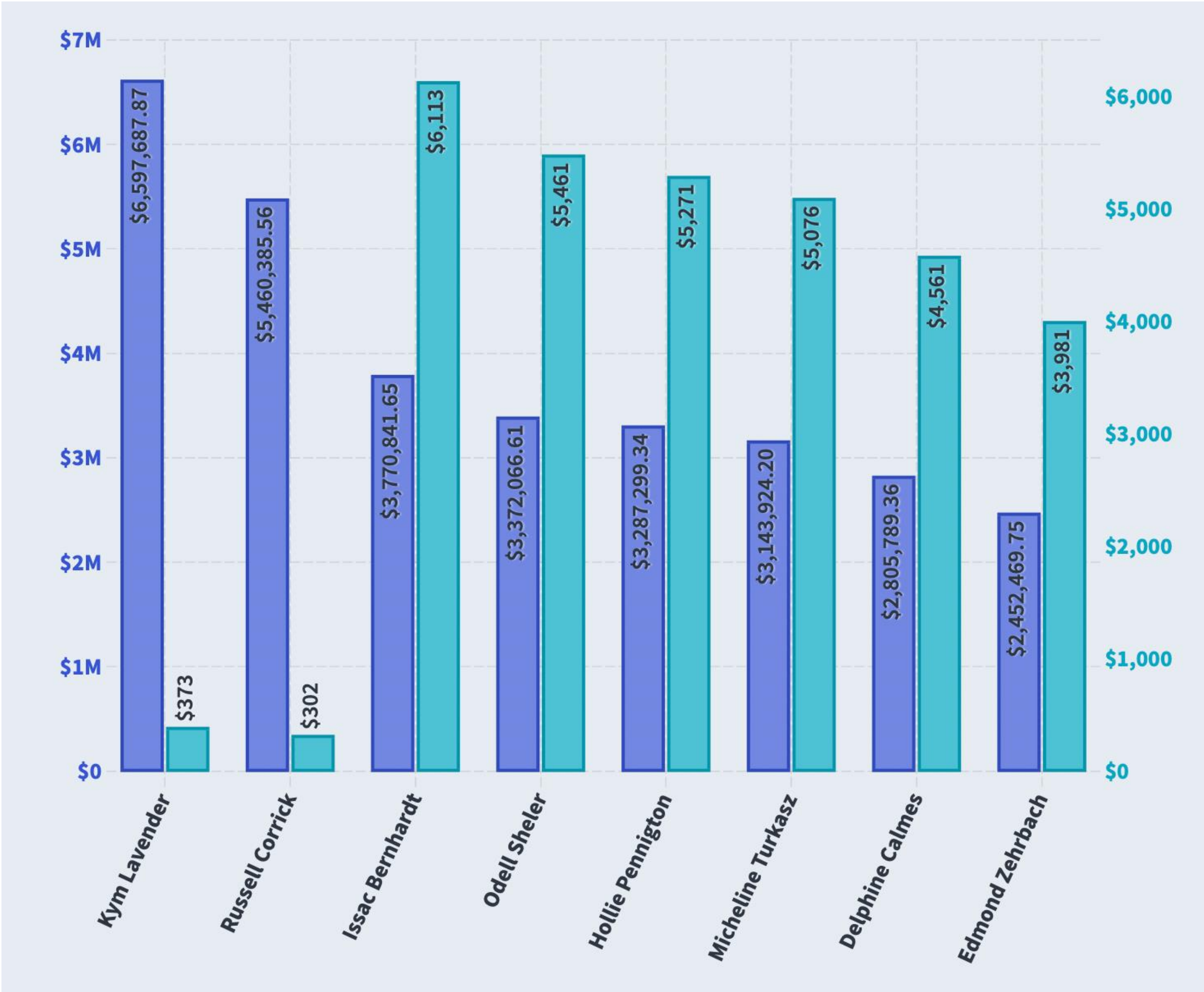
Bar value labels

You can add value and/or series name labels to bar charts. Just choose "Bar Labels" when editing a chart.



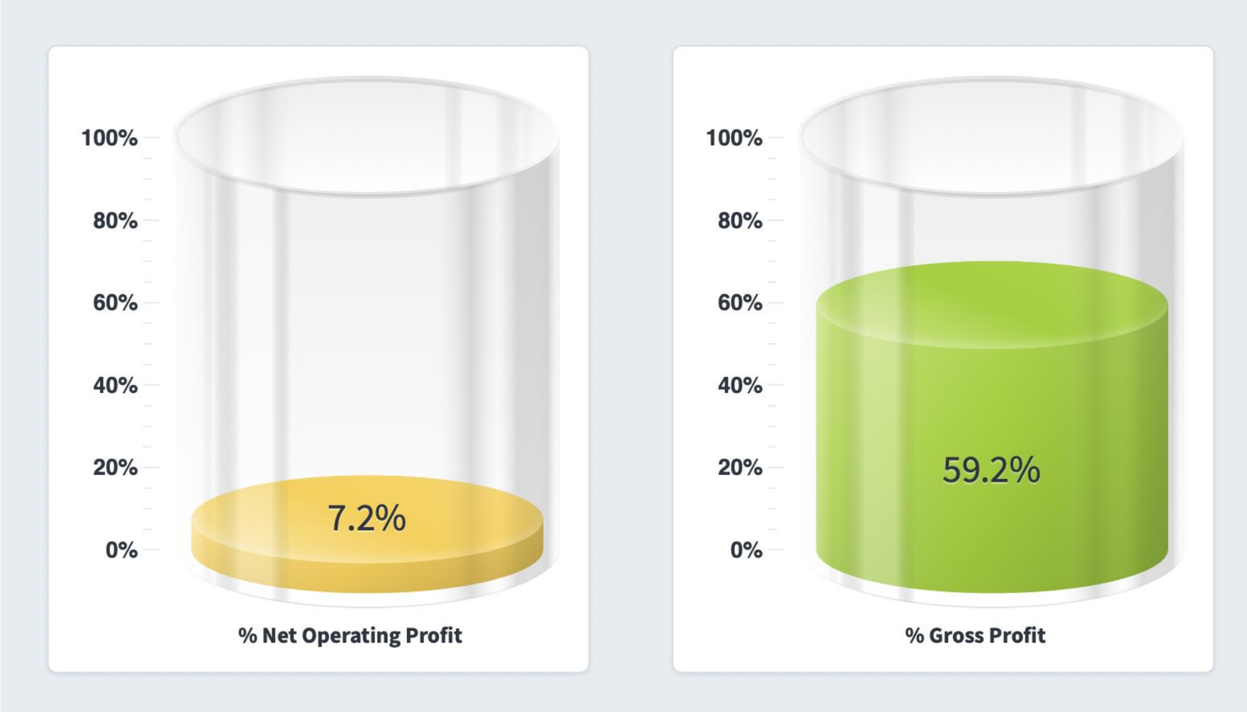
Here's an example showing value labels on bars.

When bars are too narrow to show the labels horizontally, they switch to vertical.



Filled container value labels

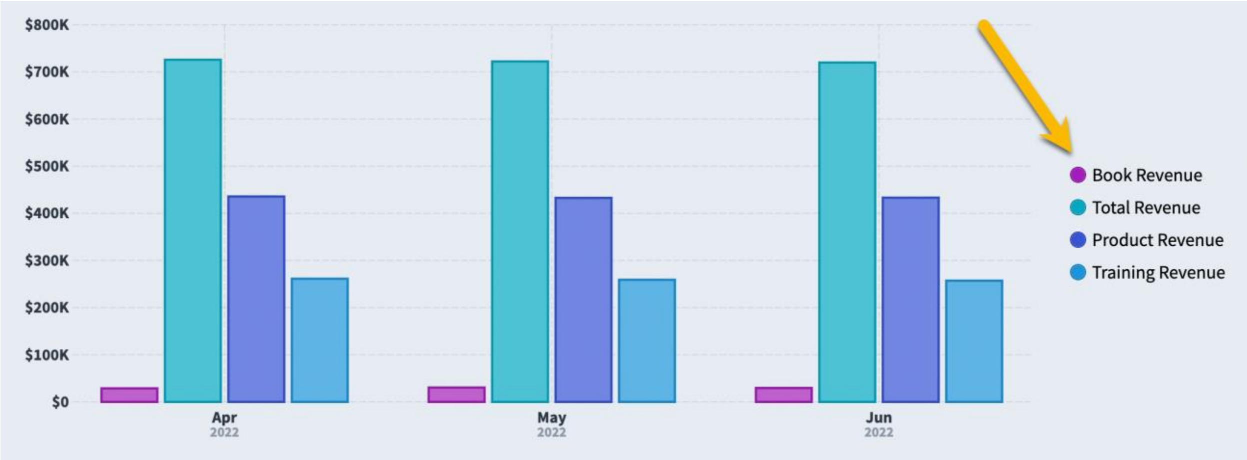
Like bar labels, you can now show value labels on filled containers.



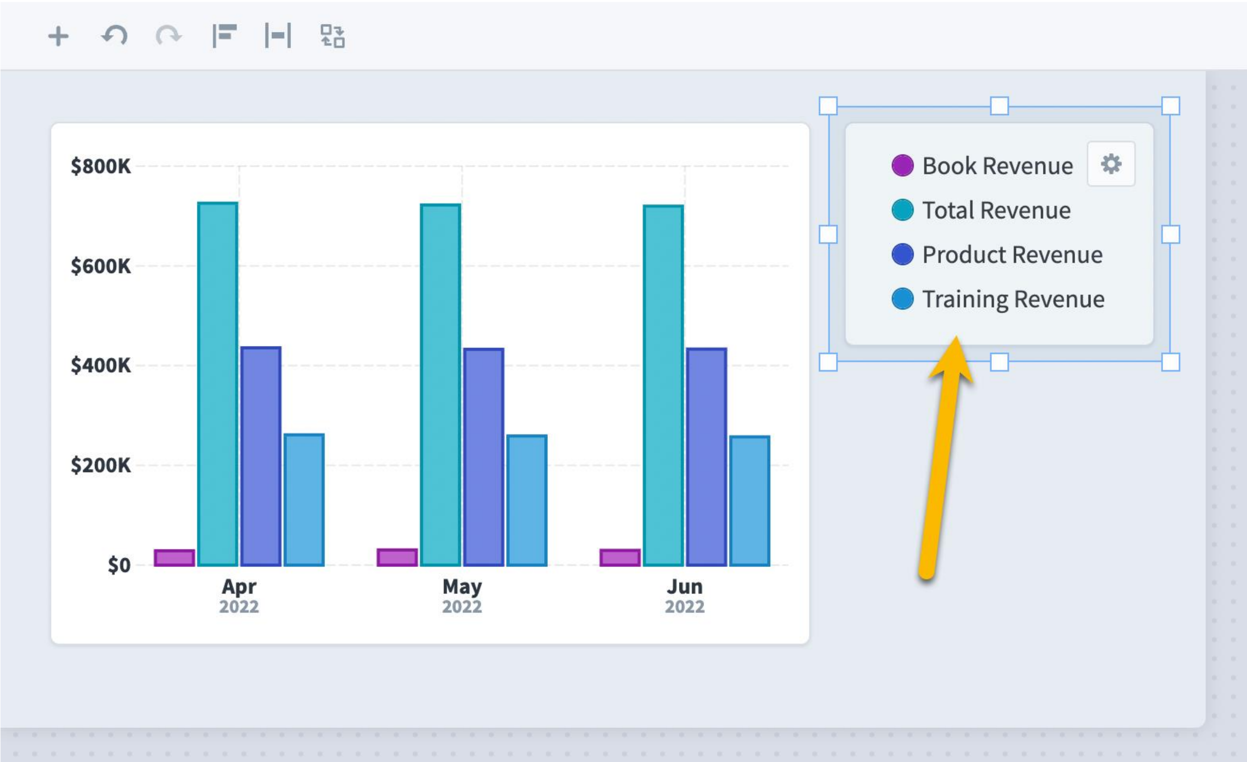
Color legend

When editing charts, you can now choose color legend options. By default, new charts are set to “Auto”, meaning that a horizontal color legend will show whenever there’s no other way to determine what the colors are. In this example each data series has a different color and Bar Labels are off, so the legend is automatically showing.

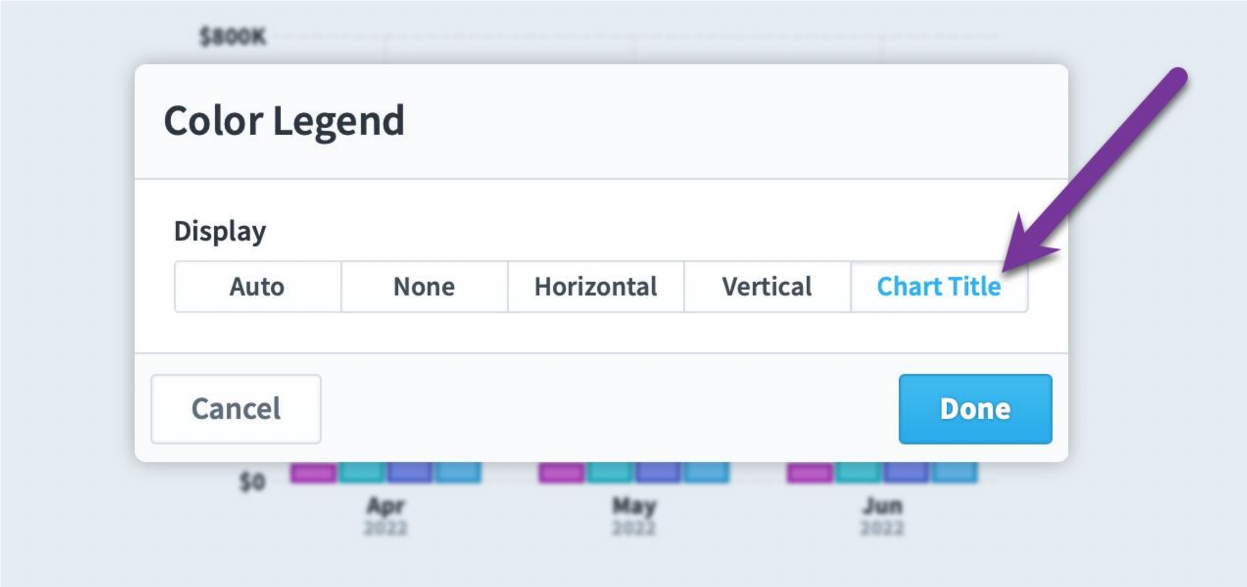
Choosing “None” will never show the color legend, and choosing “Horizontal” will always show the color legend and format it horizontally as shown above. You can also choose “Vertical” which will always show the color legend and format it vertically.



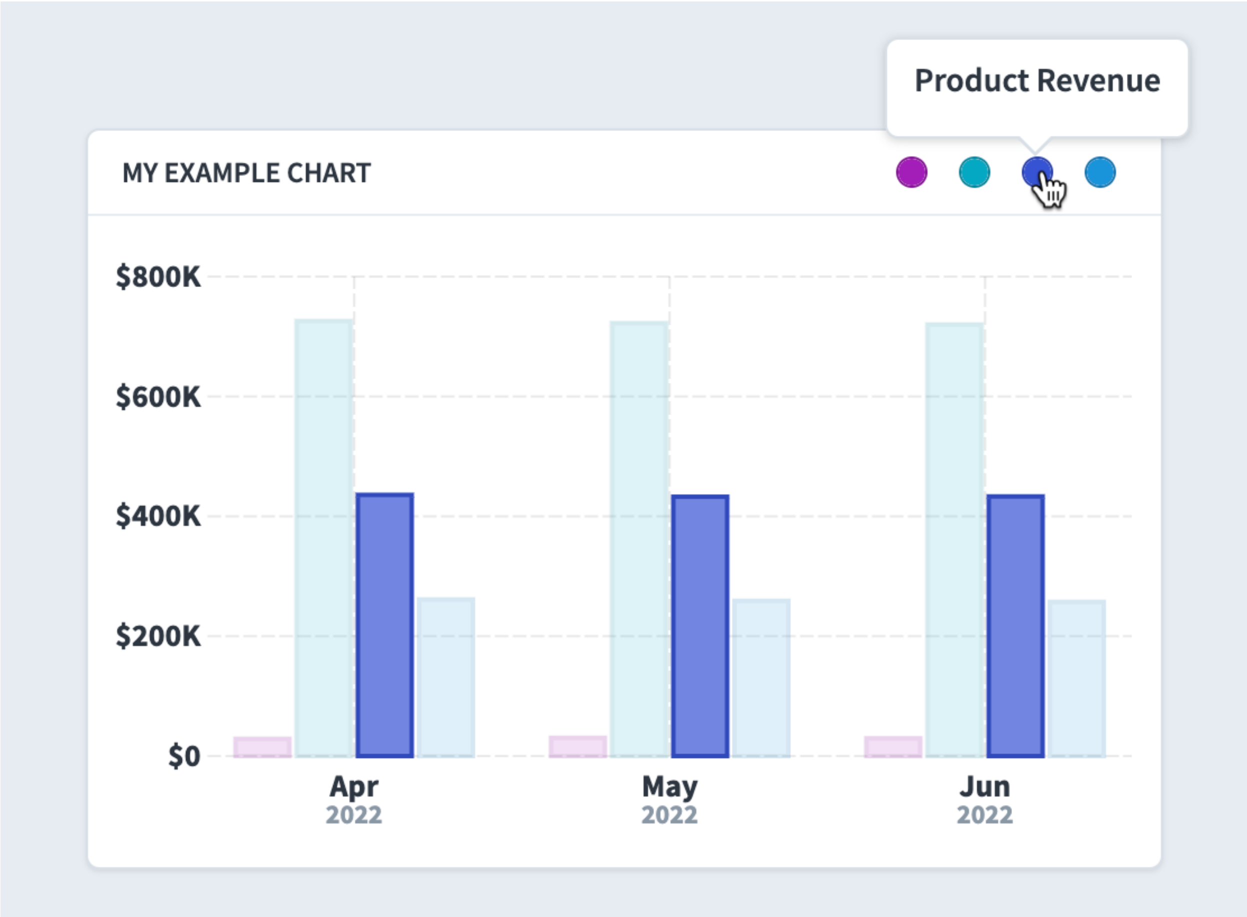
For charts on dashboards, these color legends are moved and resized separately from the chart. This matches chart data tables.



Dashboard chart widgets also have a fifth color legend option called “Chart Title”.

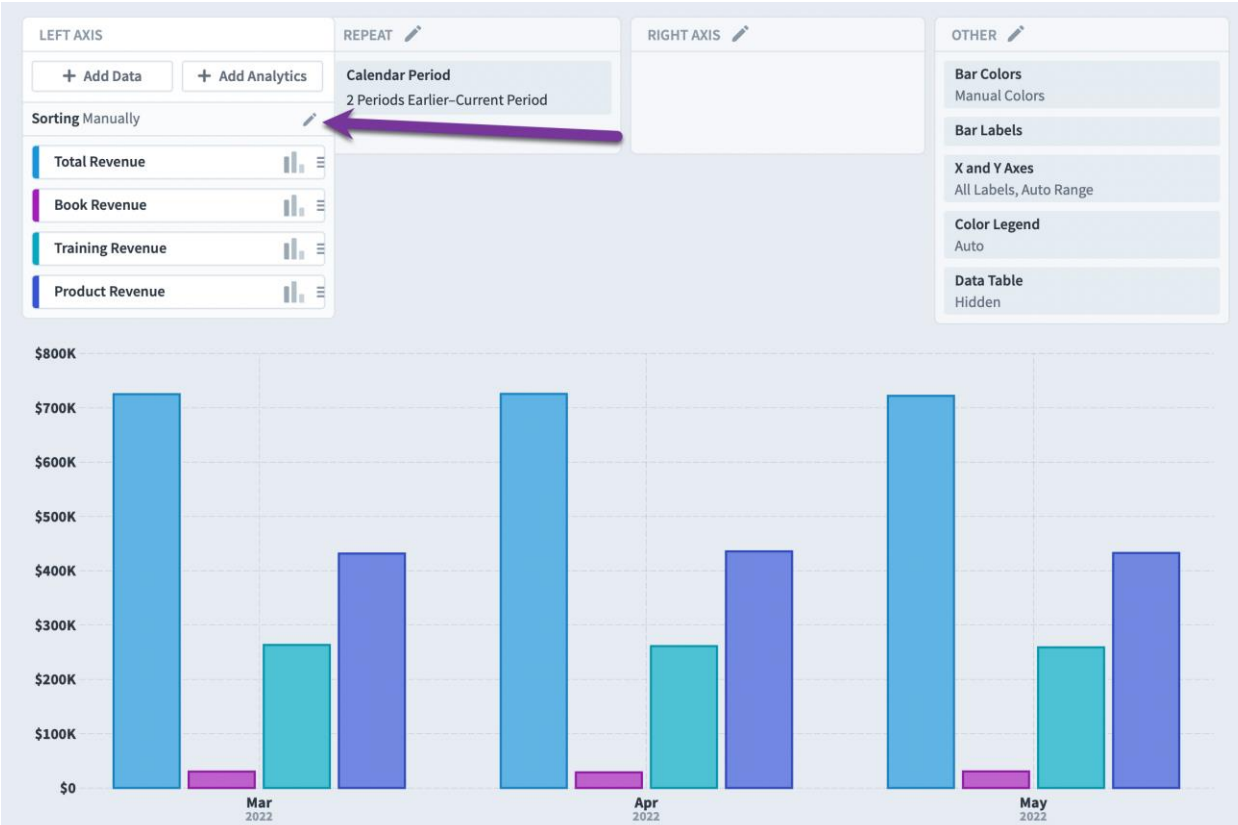


This shows the color legend as a series of dots in the chart's title, which is the way all chart legends used to appear. The chart title needs to be turned on to show a "Chart Title" legend.

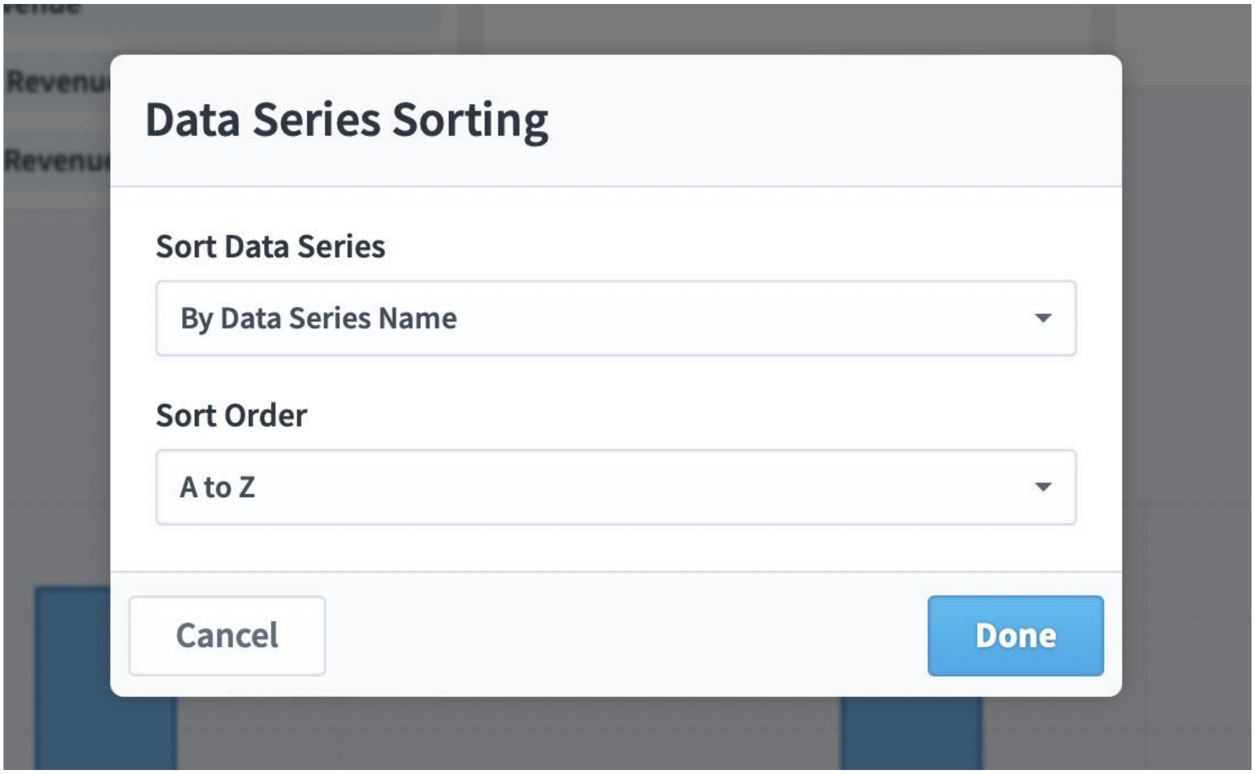


Bar chart sorting

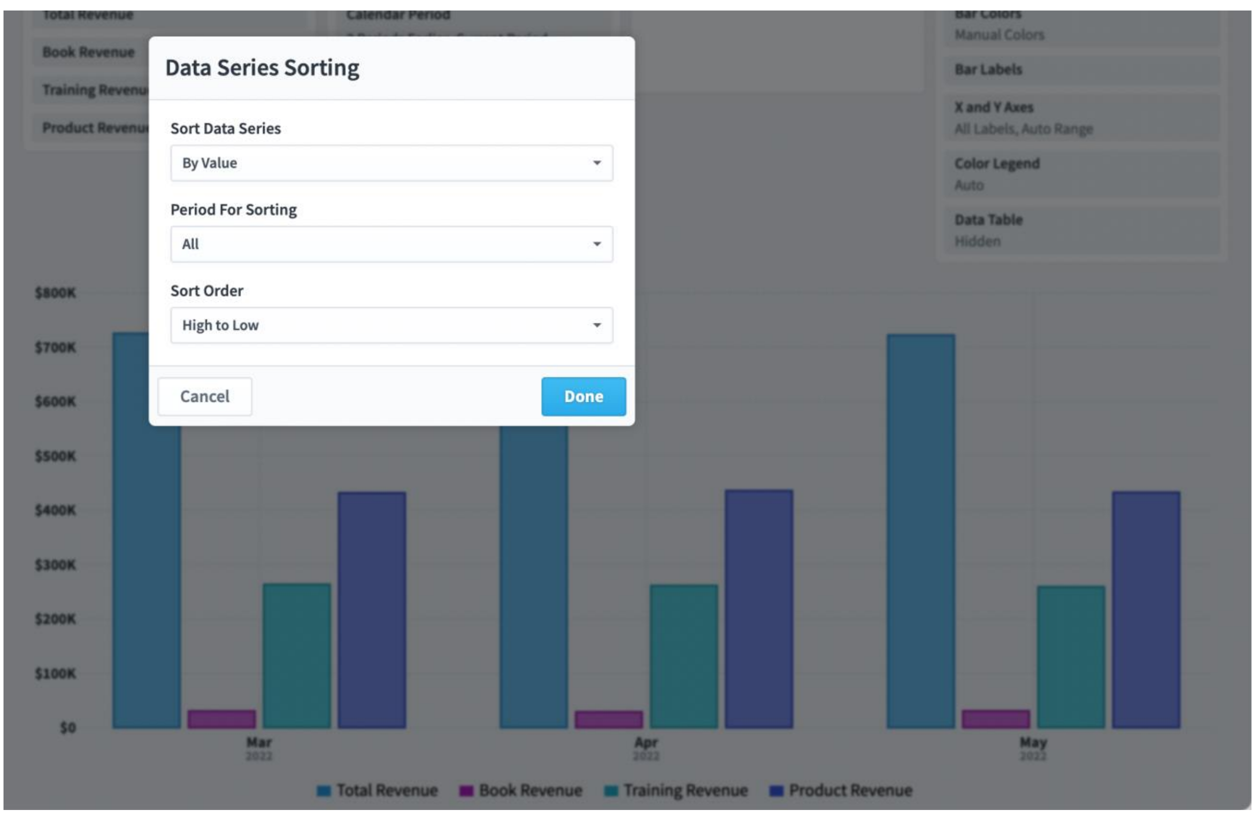
There is now a sorting option for charts with bar data series. It defaults to manual, which allows you to drag and drop data series to reorder them.



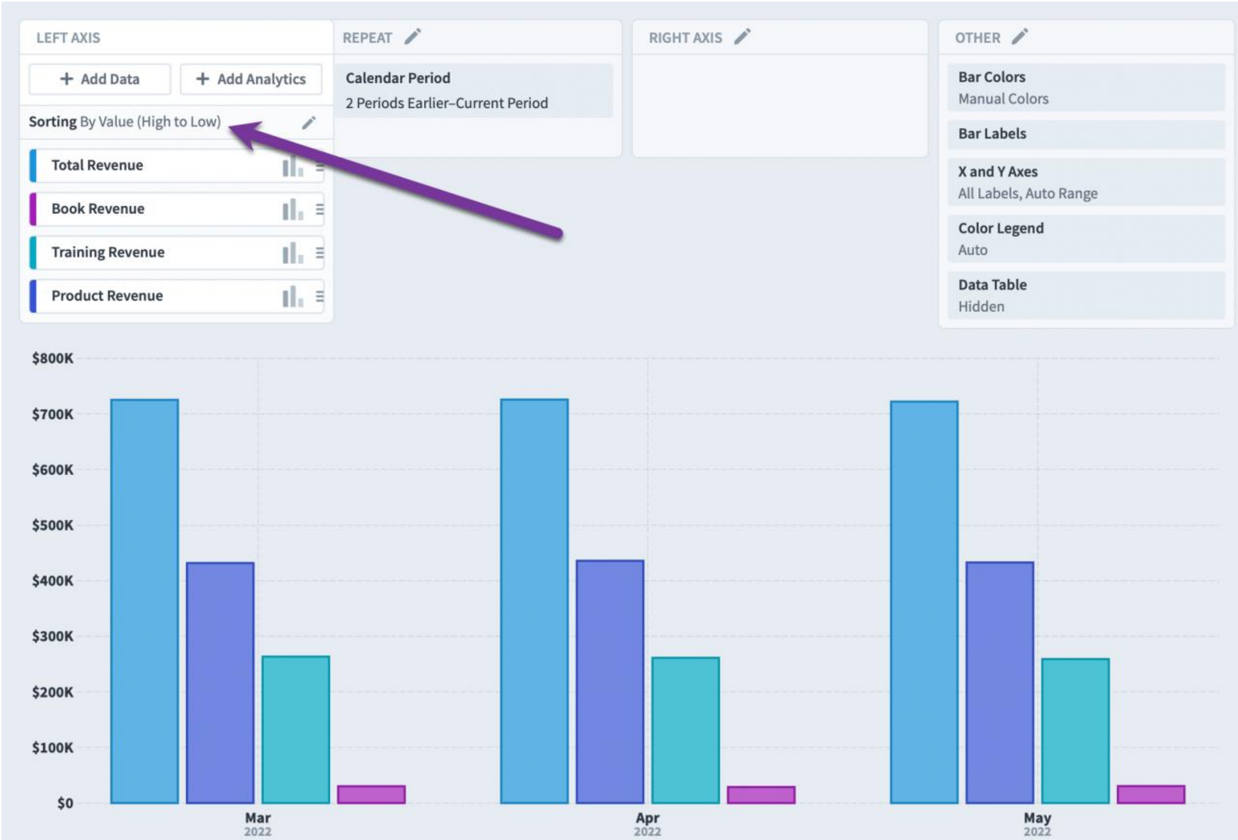
You can also choose to sort alphabetically by data series name.



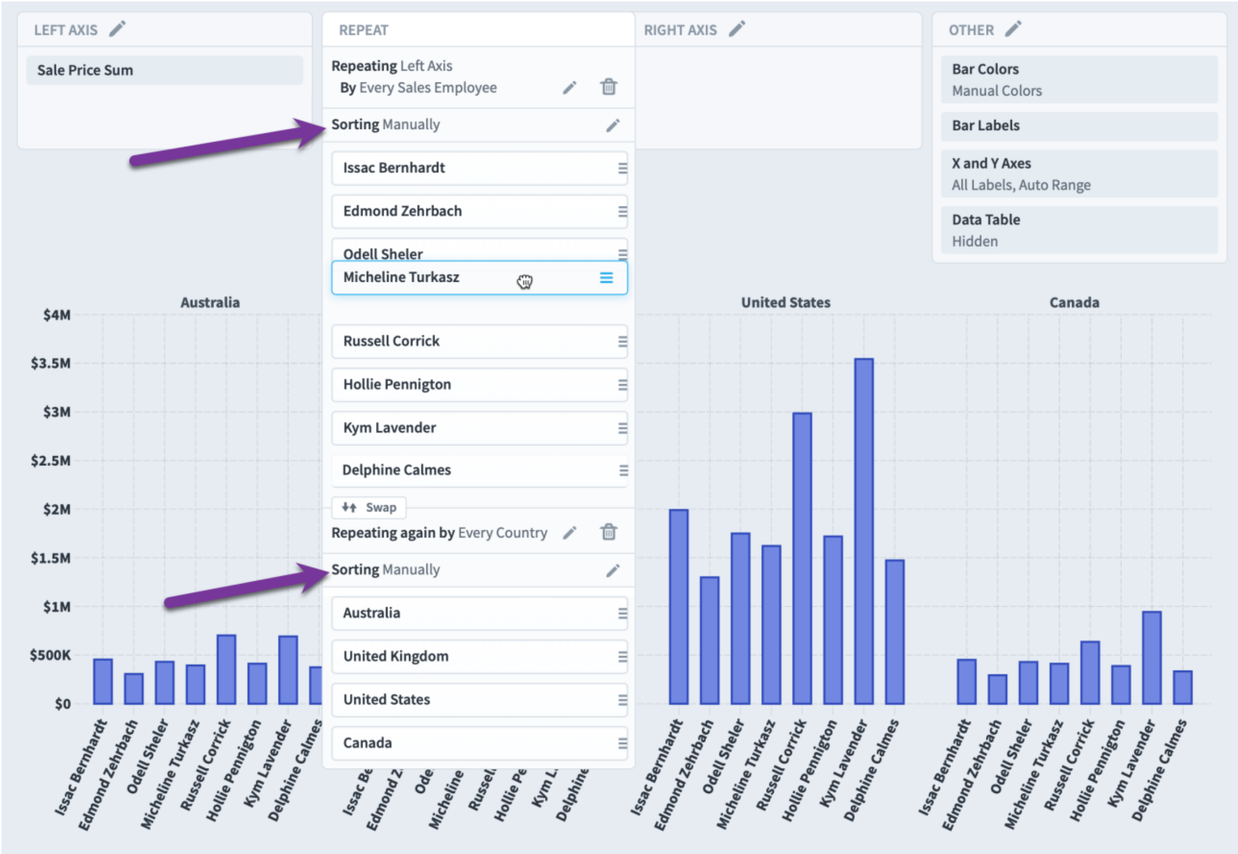
Or, you can sort by value. Here we're looking at all three periods for the sorting, but we could choose to look at a single period instead.



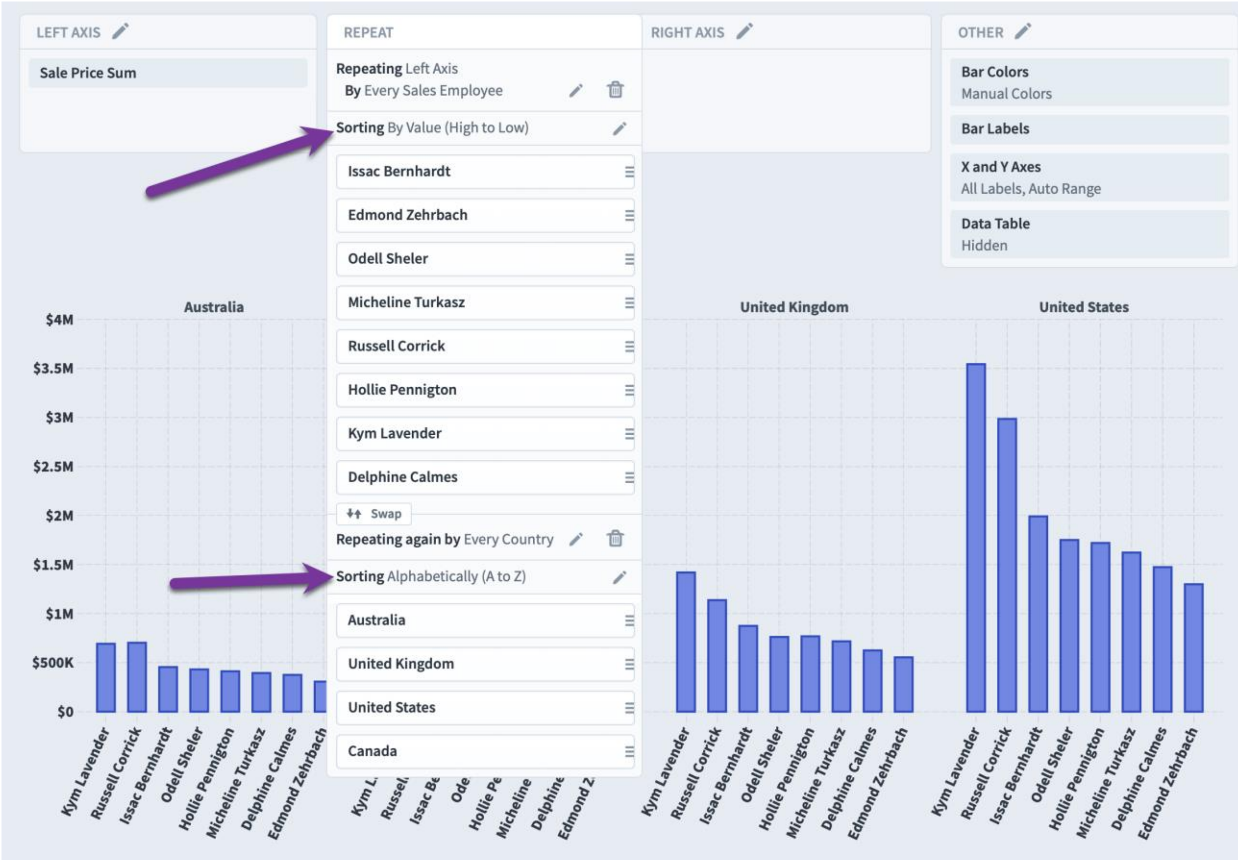
When we click done, the result is the bars being sorted high to low.



You can also sort repeating and repeating again values. Just like sorting data series, the default is manual sorting.



Here we've changed the sales employees to be sorted by value and the countries to be sorted alphabetically.

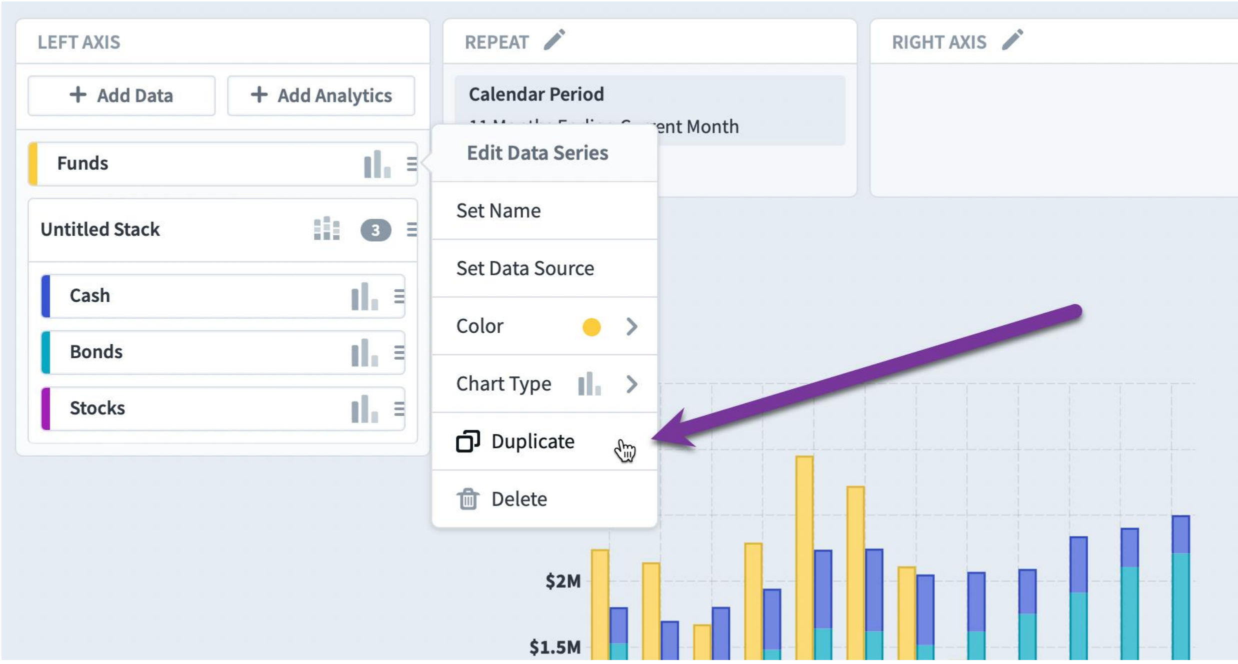


Goal lines for stacked bars

Reference lines and bands can now show data for bar stacks. In this example we're showing a goal line, which is the sum of all of the goals of the bars in each stack.

Duplicating chart items

Users can now duplicate chart series and analytics objects by choosing "Duplicate" in each object's Edit tooltips.

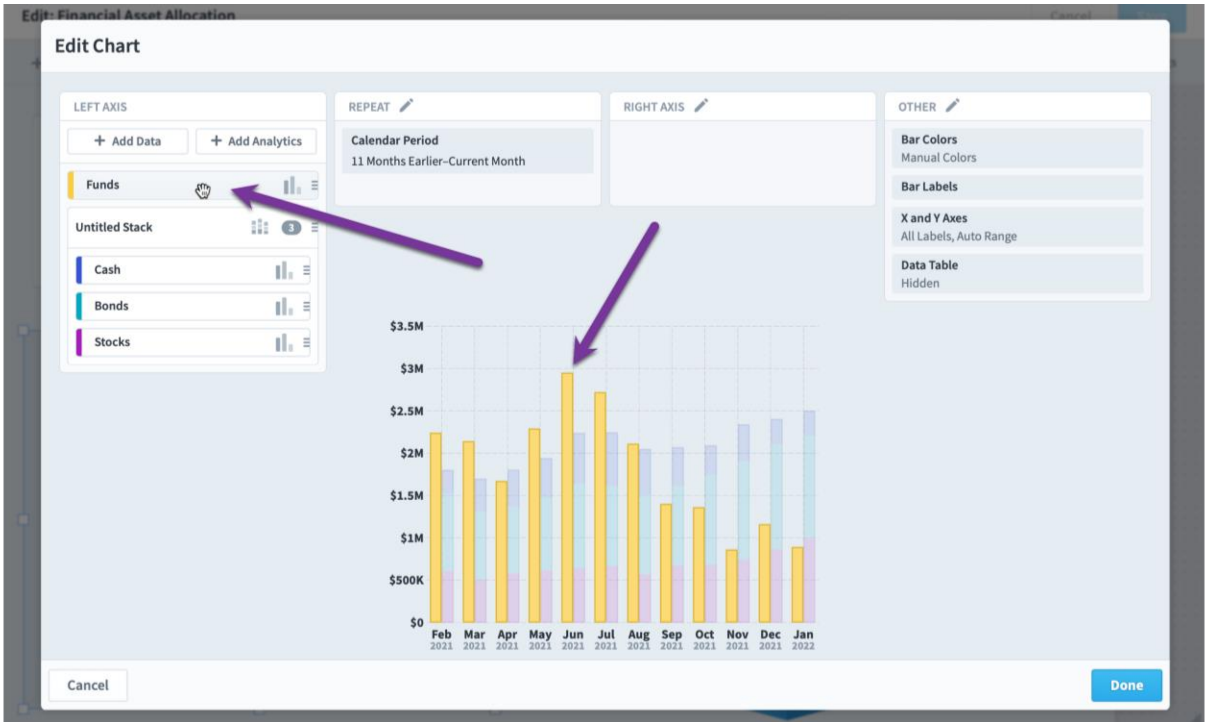


Tooltips show repeating values

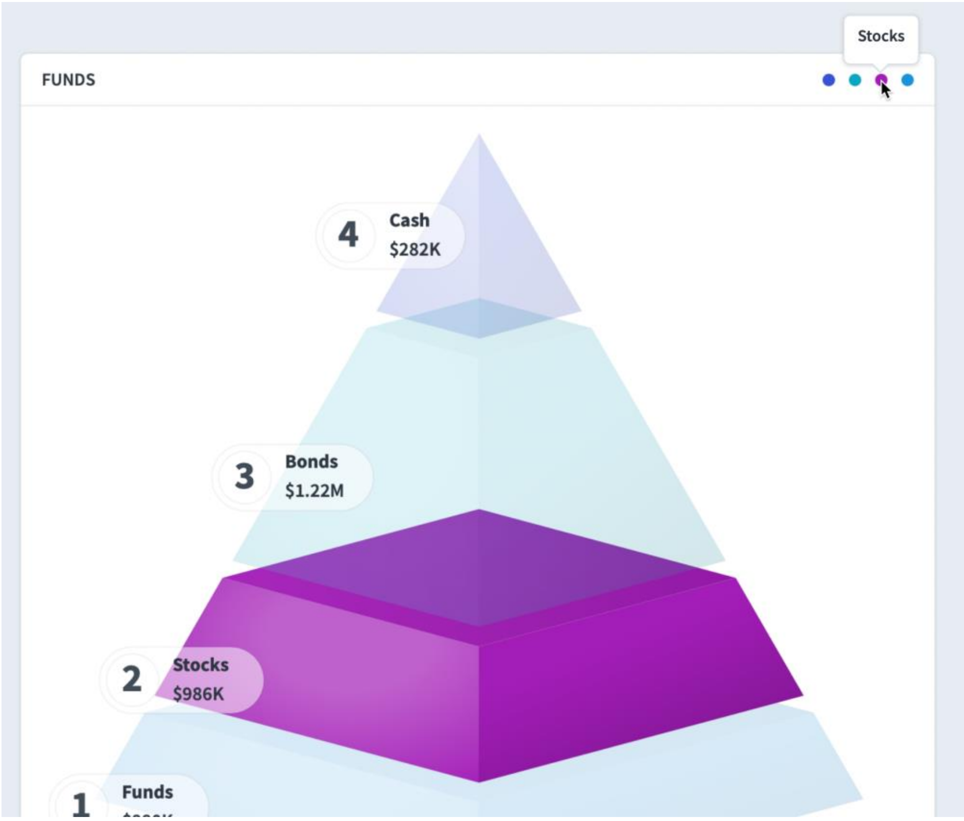
When there are multiple repeating series, the chart tooltips now show both the series name and the repeating value name.

Emphasize chart series

When editing charts, everything but the item that you're hovering your mouse cursor fades out. This helps you identify what you're editing.

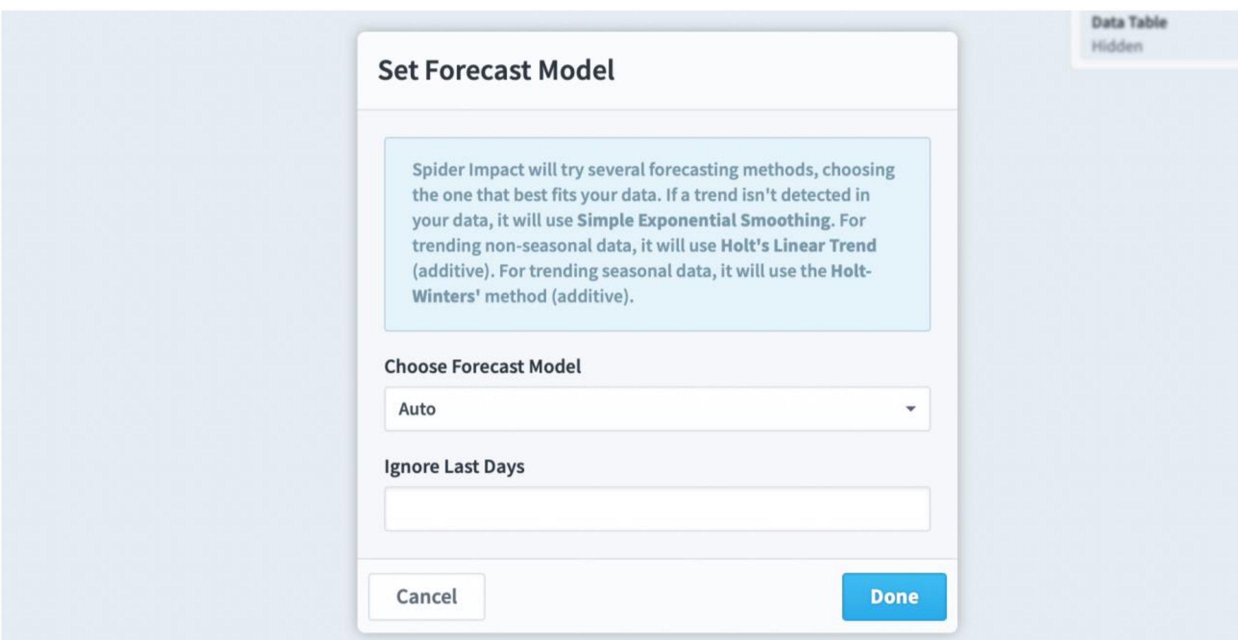


Charts also behave similarly when you hover over an item in the legend.



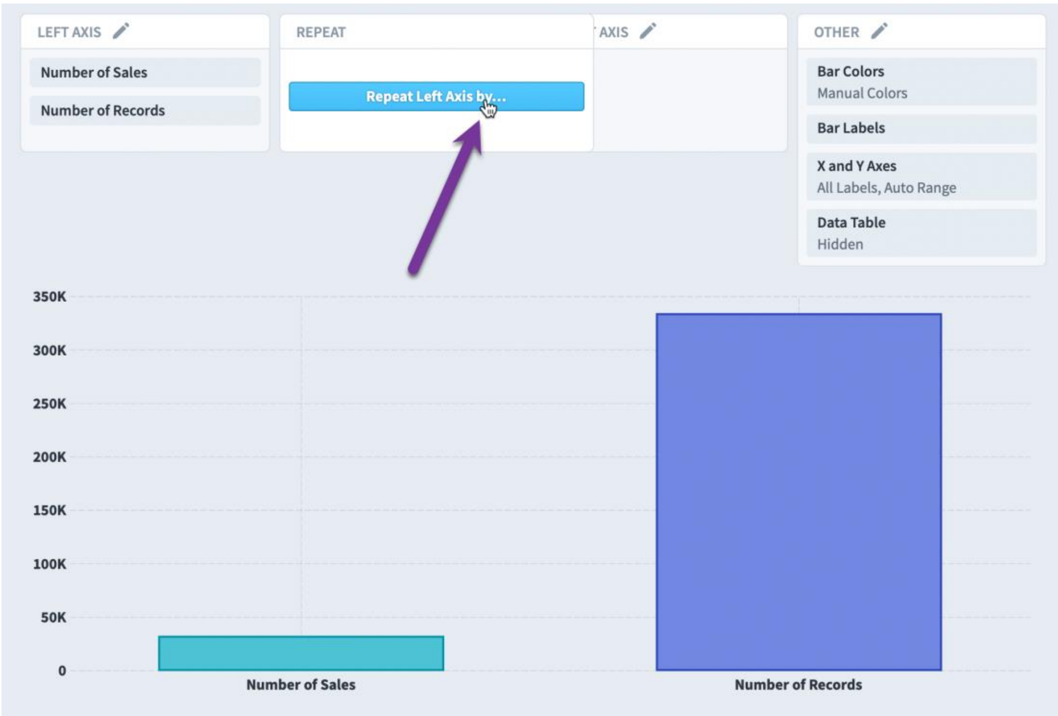
Additional details about forecasting models

Whenever showing forecasted values on a chart, the software now explains exactly how it is predicting the results.

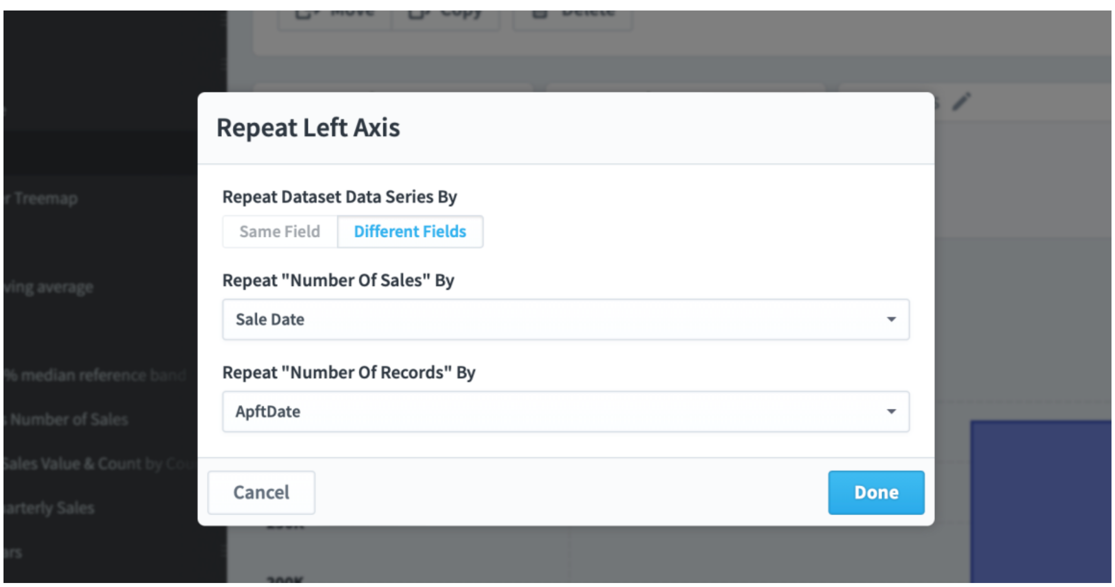


Repeat by different dataset fields on charts

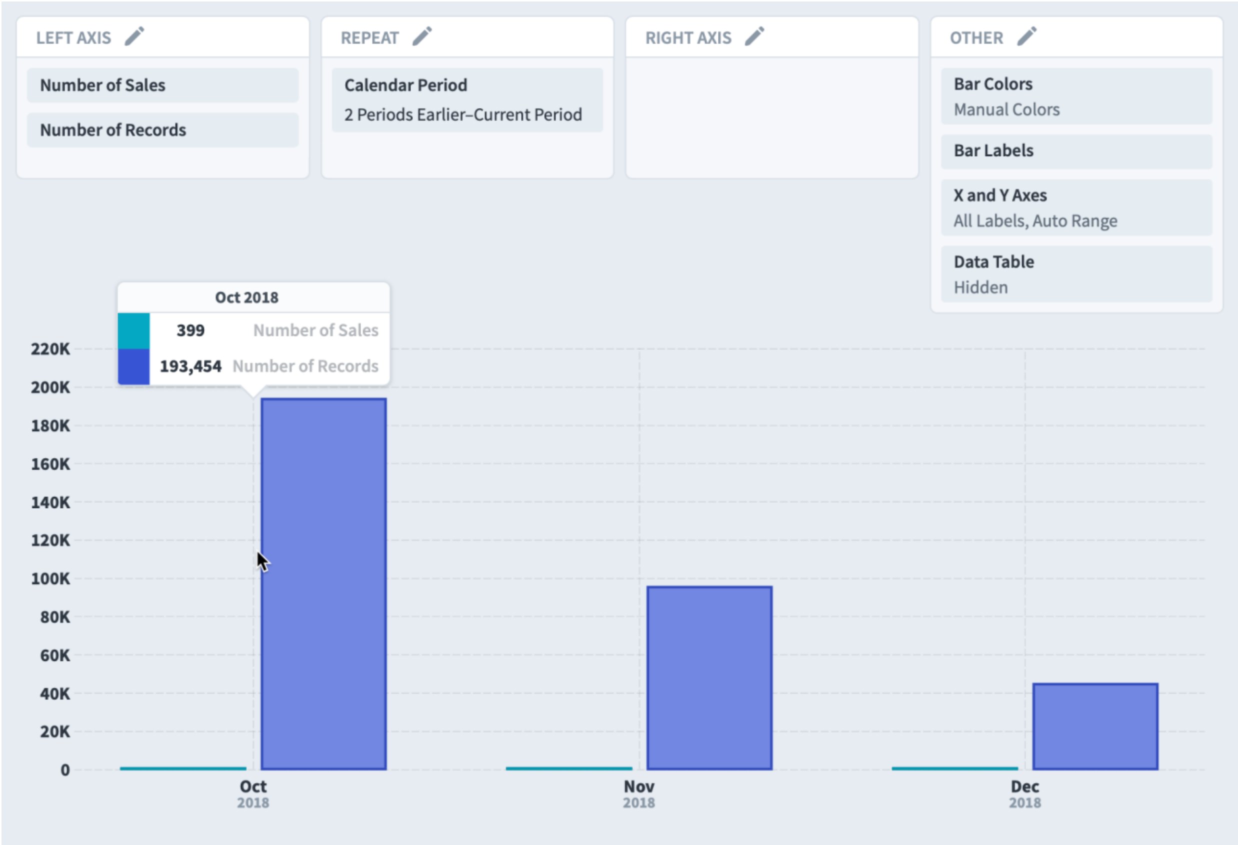
In the past, if you wanted to repeat chart series over time, the series needed to be from the same dataset because you needed to choose a single field to repeat by. In this example the number of sales and the number of records couldn't be repeated because they're from different datasets.



You can now repeat by different date fields. This works for both basic and calculated chart series.

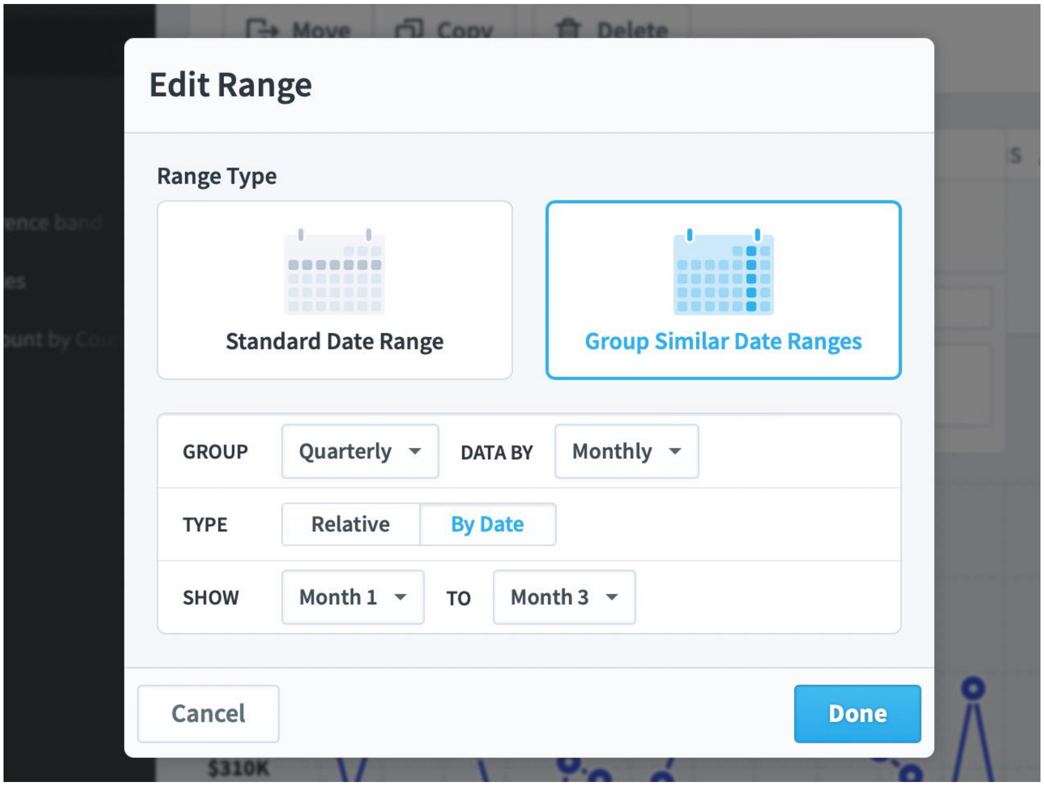


Here's the same chart now repeating by time.

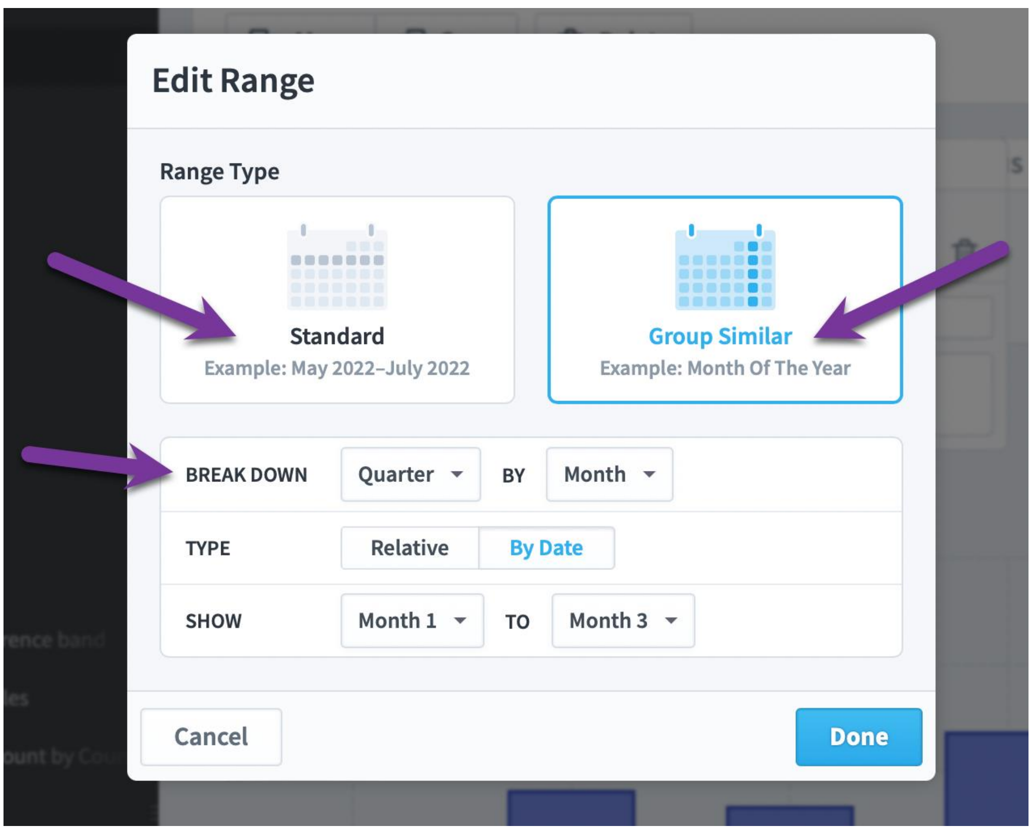


Improved range type controls

Labels for chart range types are improved. Here's what it looked like in version 5.



Here's the appearance in version 5.5. The range type labels now include an example, and the breakdown labels are clearer.



Forms

Overview of Forms

Forms is a new section in Spider Impact that allows you to build forms that add and update dataset records. It's perfect for supplementing datasets with additional fields that aren't tracked in the system of record, but it's also great for collecting and managing data that isn't stored in any system of record.

Before we get into the details of the Forms section, let's cover why this functionality is important. There are three types of data that Spider Impact tracks.

- Scorecards (KPIs) are updated on regular basis and are tracked forever. Each KPI has a single value for every period.
- Initiatives have a start date and an end date and usually last around 18 months. They are updated irregularly and have two values (budget and percent complete).
- Datasets track large amounts of unstructured data. Instead of tracking a single value (KPIs) or two values (Initiatives), dataset records can have dozens of values. For example, first name, last name, phone number, etc.

All three types of data can be updated through outside sources like spreadsheets or database connections. They can also be manually updated directly in Spider Impact.

KPIs and Initiatives have very specific data formats, and Spider Impact already has great update forms for them. People can log into Spider Impact and use the built-in forms to quickly update all KPI and Initiative values for the items that they own.

There is, however, no universal form to update dataset values or create new dataset records. That's because datasets have unstructured data and can have dozens of fields. That's what the new Forms section is all about. It allows people to build the forms that they need to manually put data into Datasets.

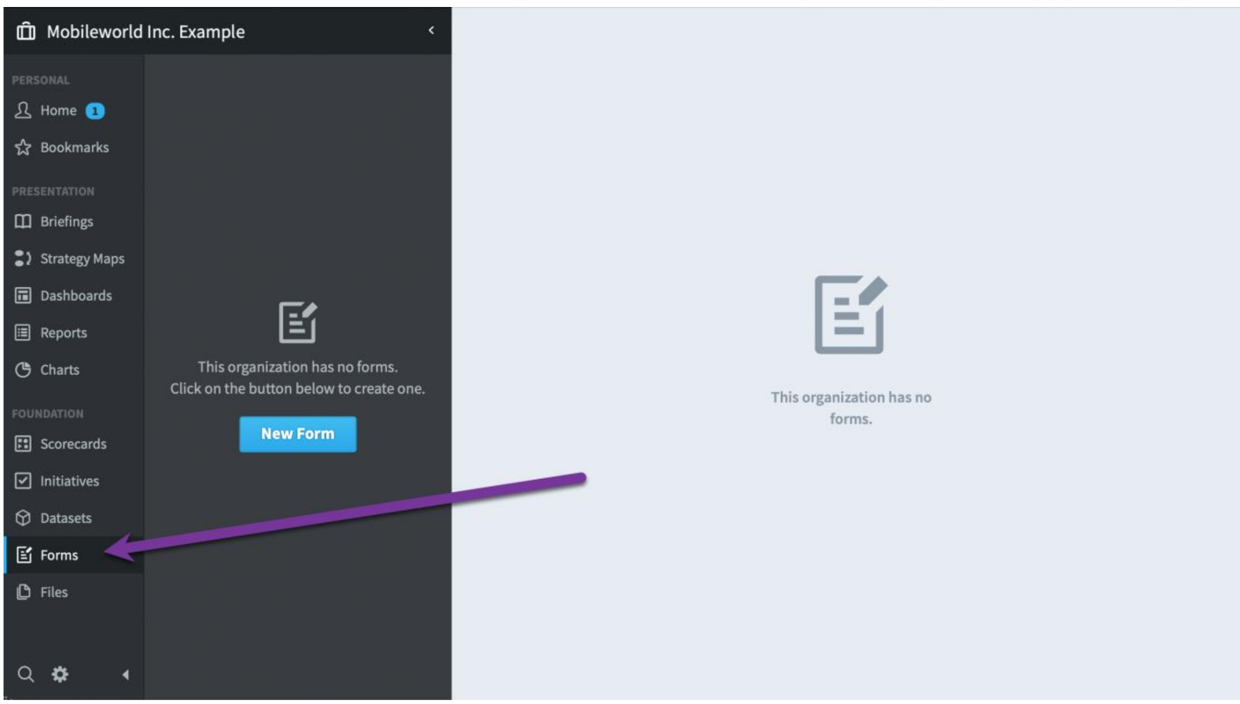
Security and permissions

Forms inherit permissions and security from the Datasets section, allowing you to focus on building the best form for your data. You only have permission to view, add, or modify records in the Forms section if you have permission to do the same thing in the Datasets section. If you only have permission to view some of the records, you'll only see some of the records in the Forms section.

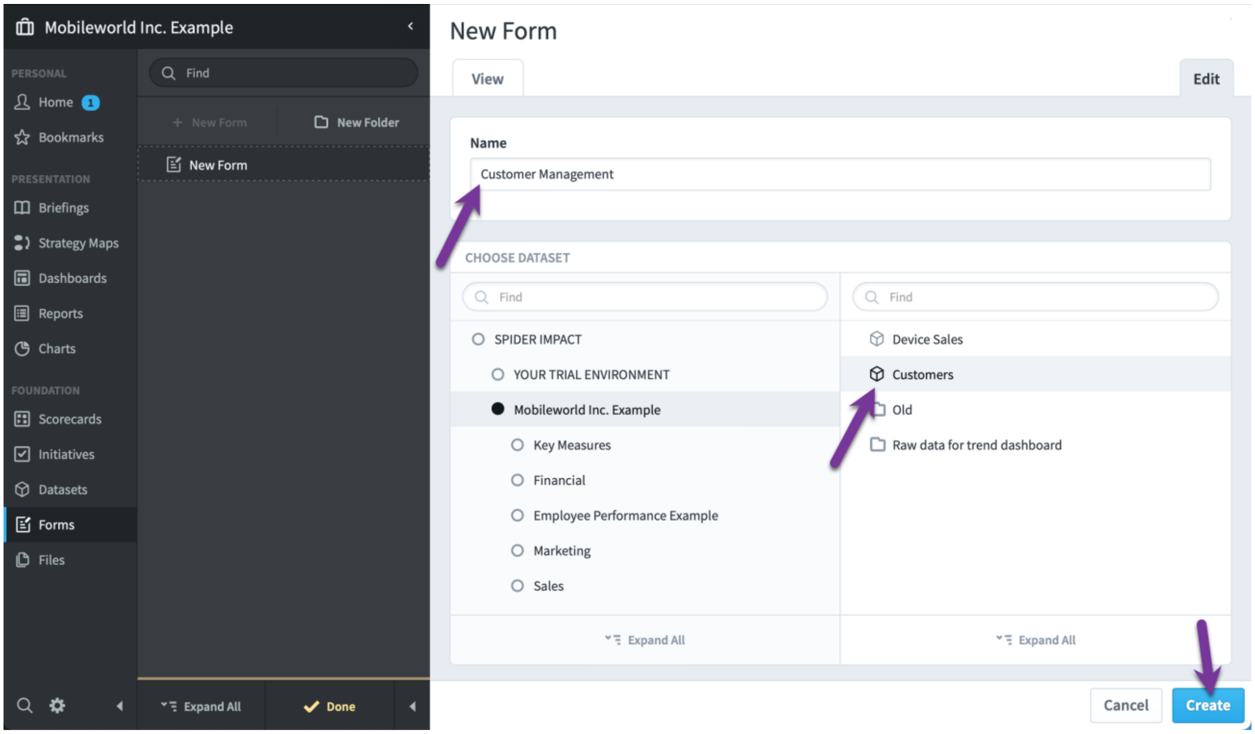
Building forms

Creating Forms and form pages

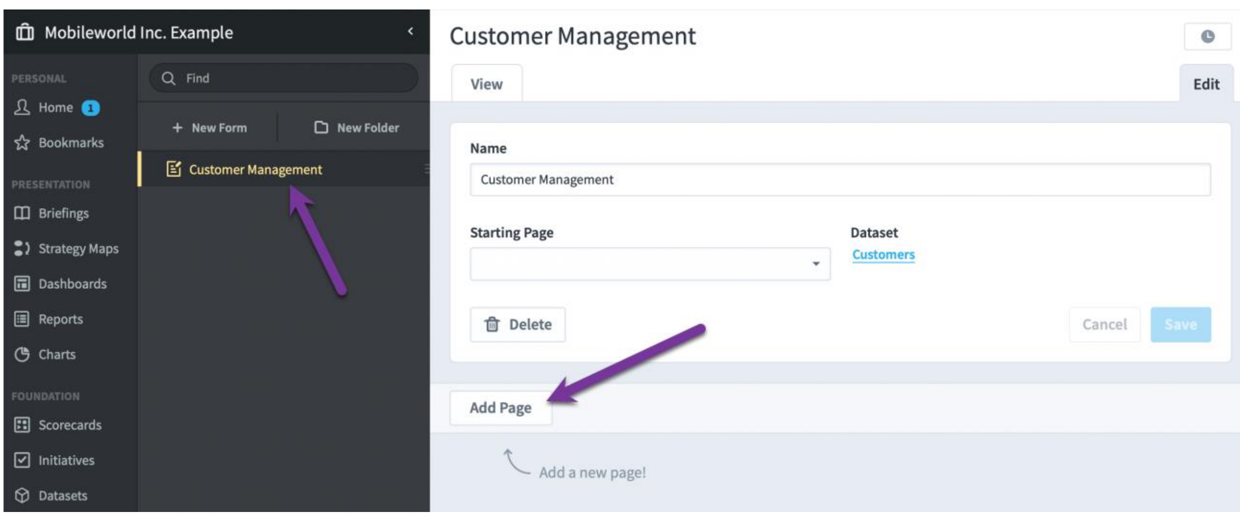
The Forms section in Spider Impact is in the menu pane on the left.



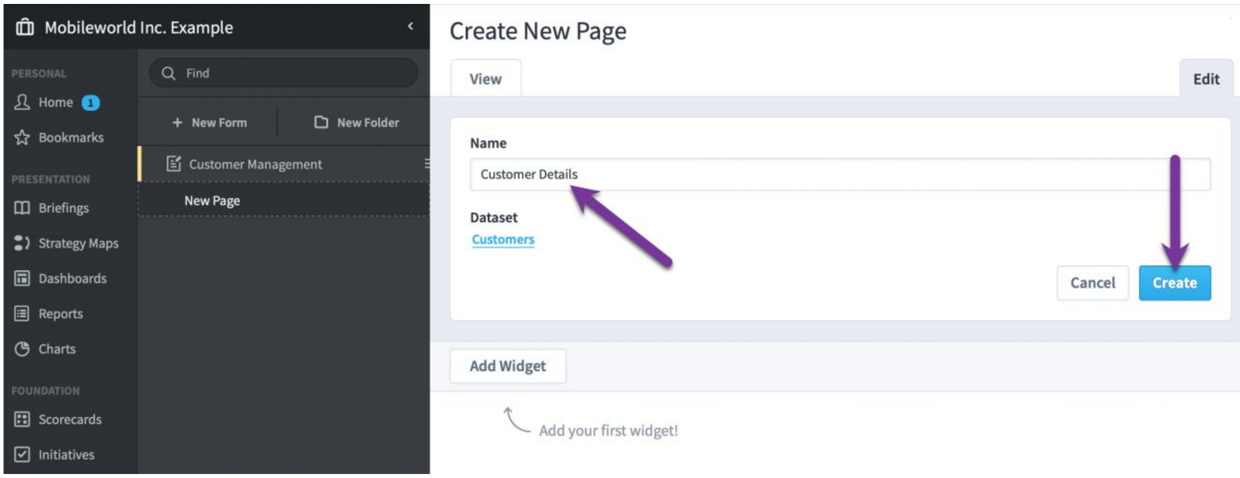
To create a new form, click the "New Form" button and choose a dataset. Each form is associated with a single dataset, and that's what you're choosing right now. In this example we'll choose the Customers dataset, name the form "Customer Management" and then click the Create button.



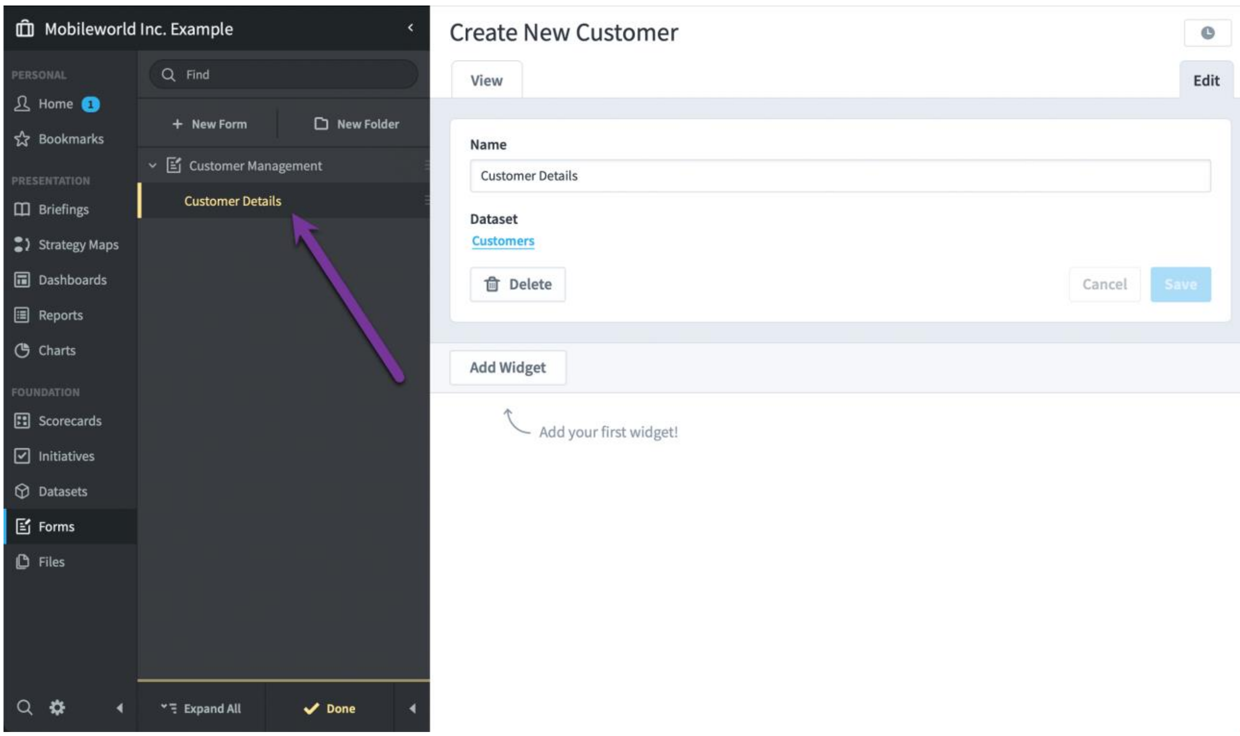
Now that our form is created, we'll add the first page to the form.



We'll call this page "Customer Details".



We now have a form for the Customers dataset with one blank page.

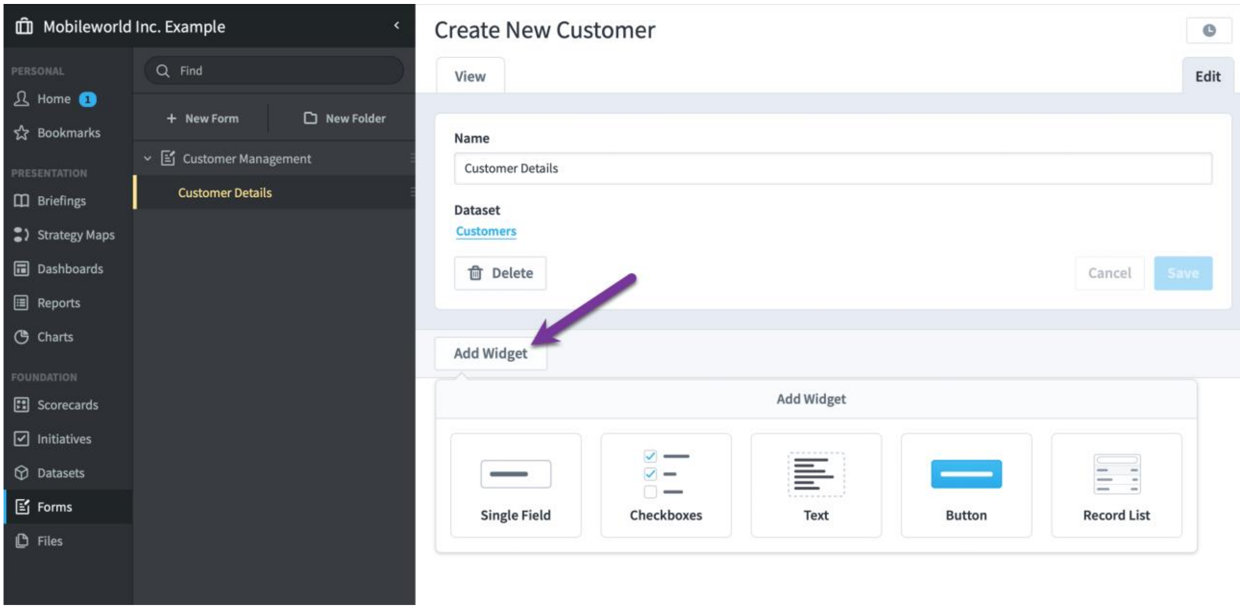


Adding form widgets

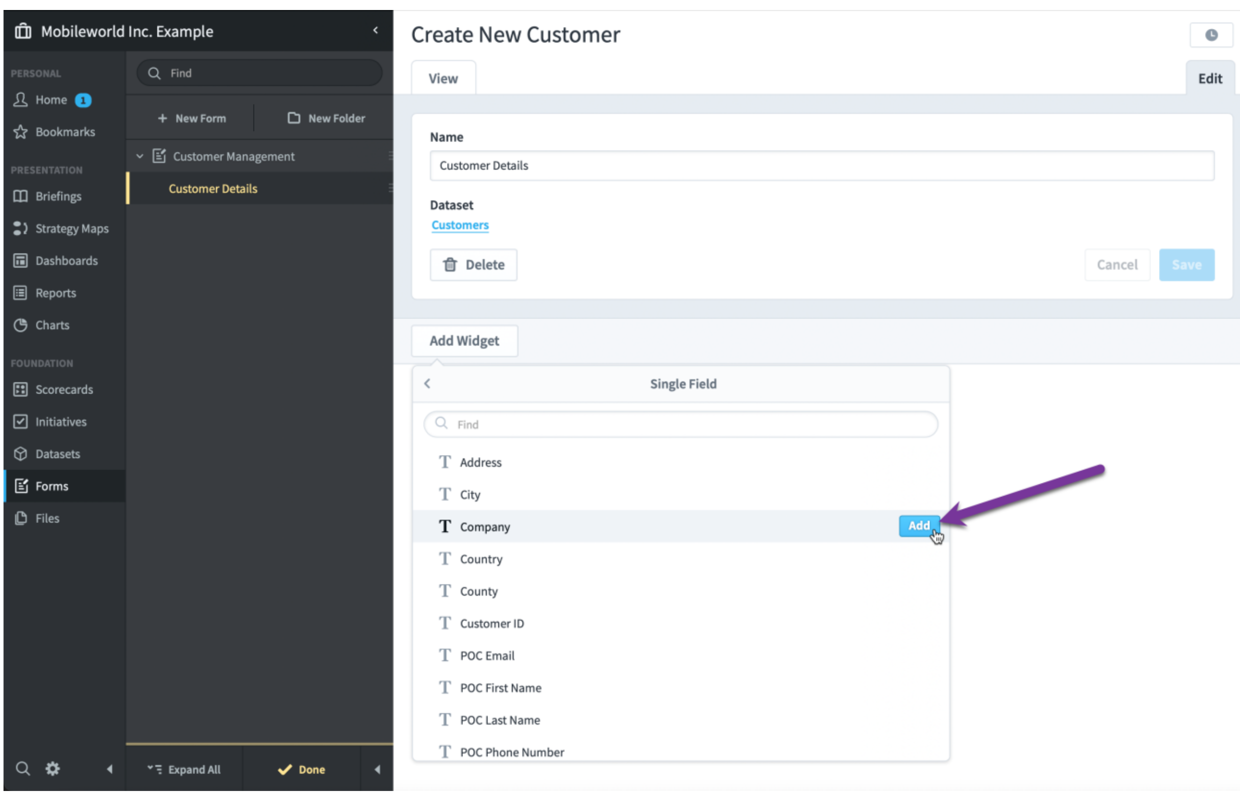
To add form widgets to a form page, click the "Add Widget" button. You can choose to add one of the following widgets, all of which are explained in detail below.

- Single Field
- Checkboxes
- Text

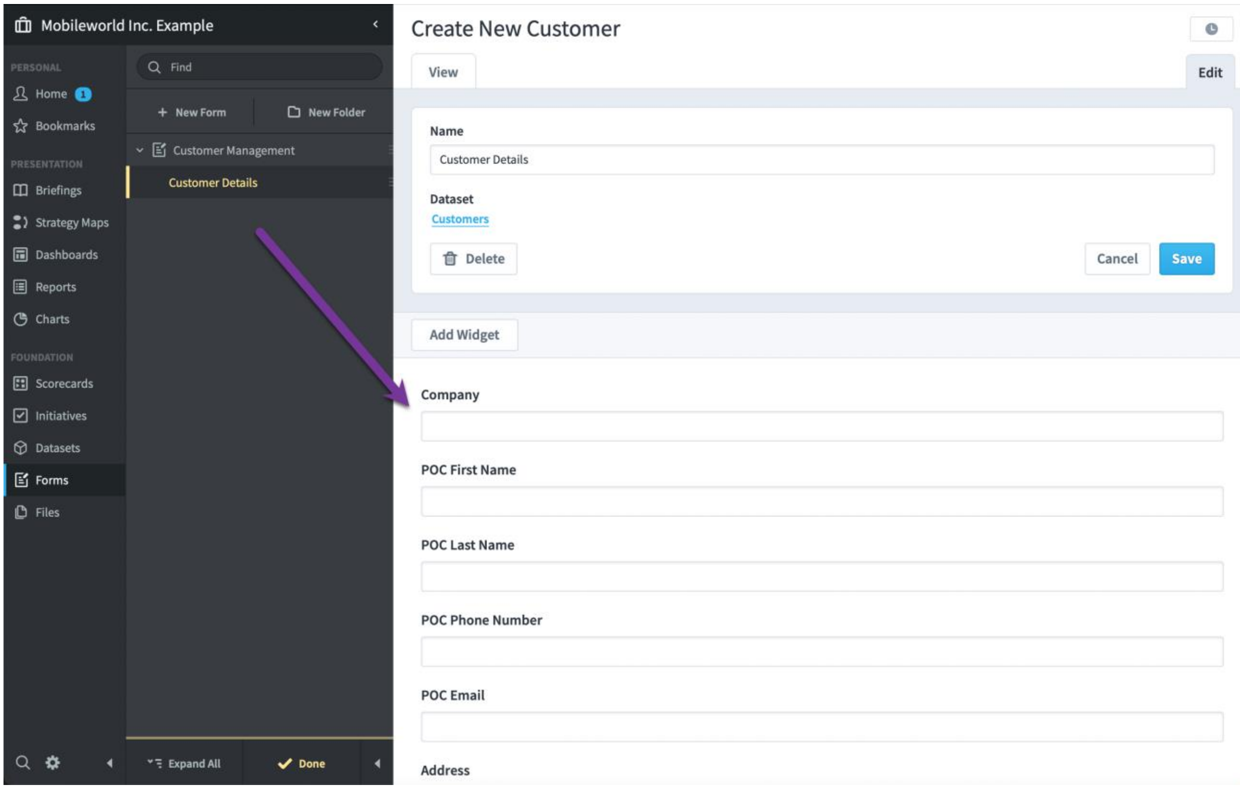
- Button
- Record List



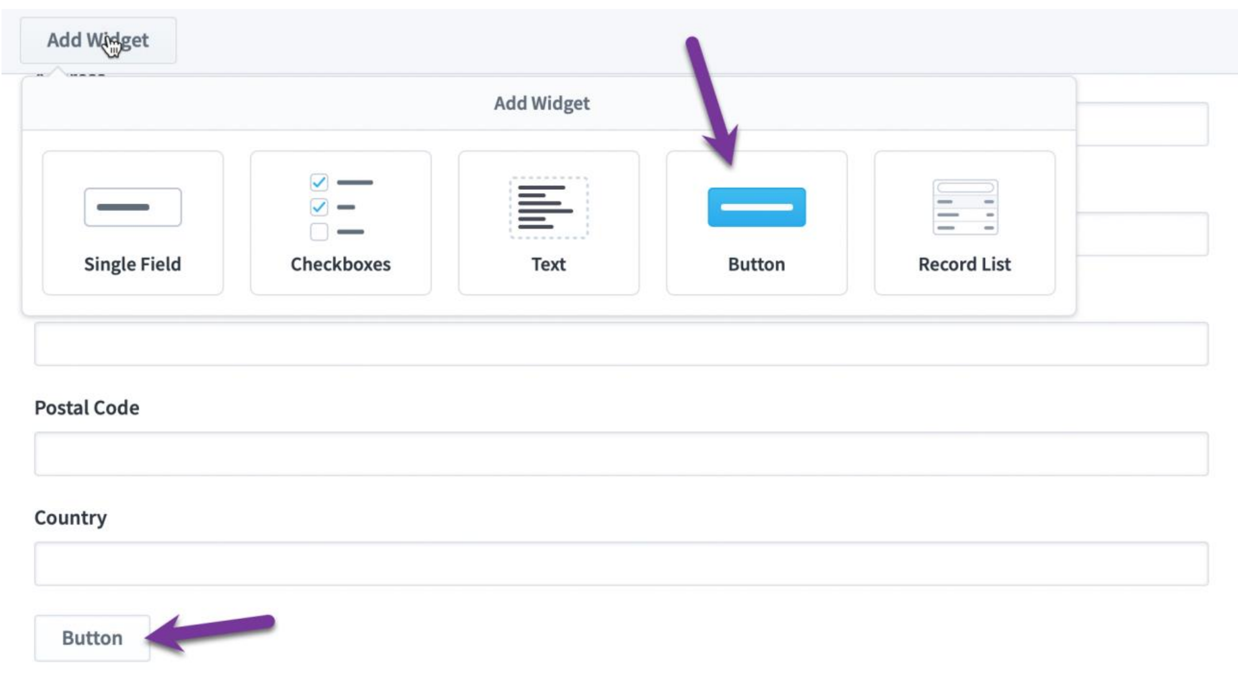
We'll choose Single Field widget, and then we'll start adding widgets for the Customer dataset's fields.



It looks like this when we're done.

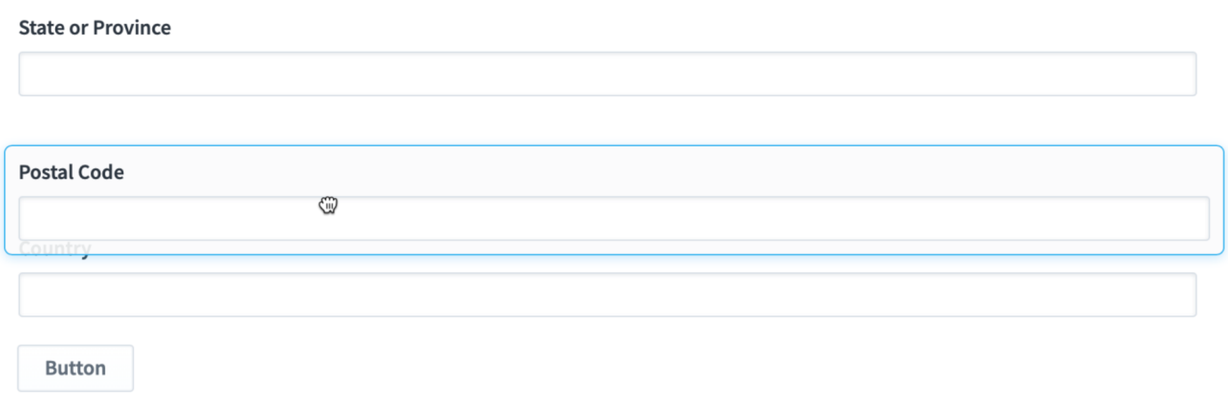


We'll also add a button widget.



Arranging form widgets

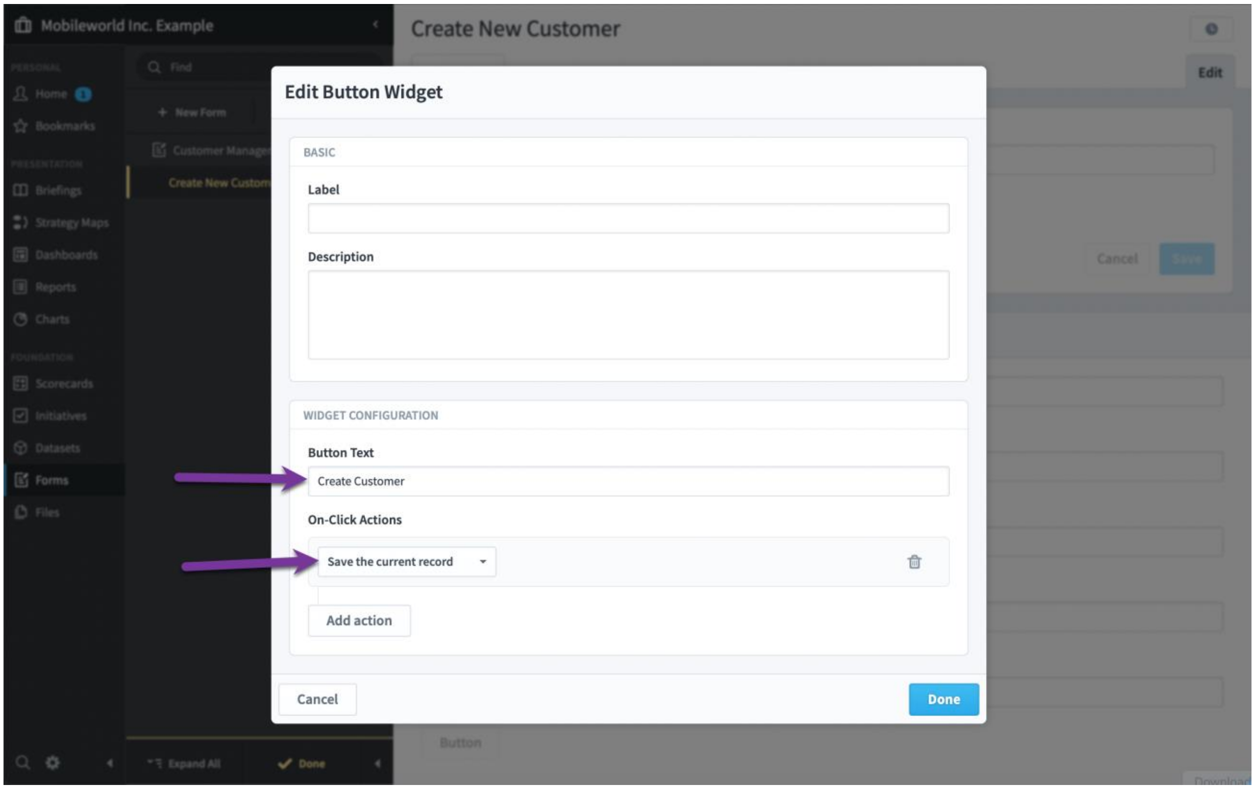
New form widgets are added at the bottom of the page, but you can drag and drop widgets to reorder them.



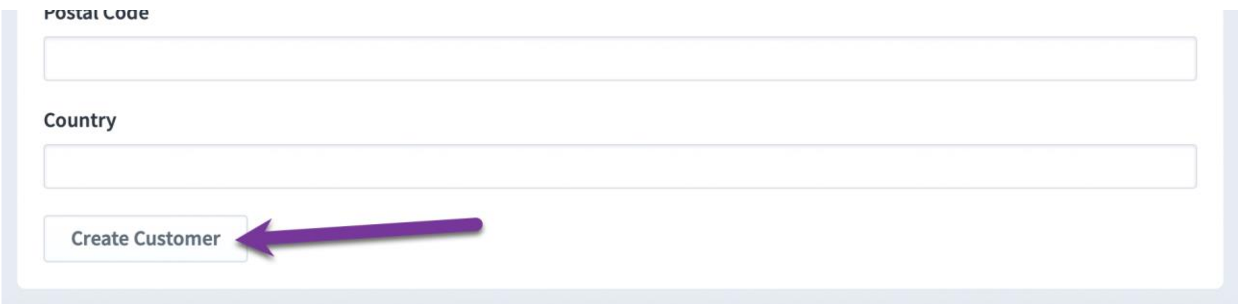
Editing form widgets

To edit a widget, just click its Edit button.

This opens the Edit Widget dialog. We'll change the button text to "Create Customer" and we'll add an On-Click Action of "Save the current record".

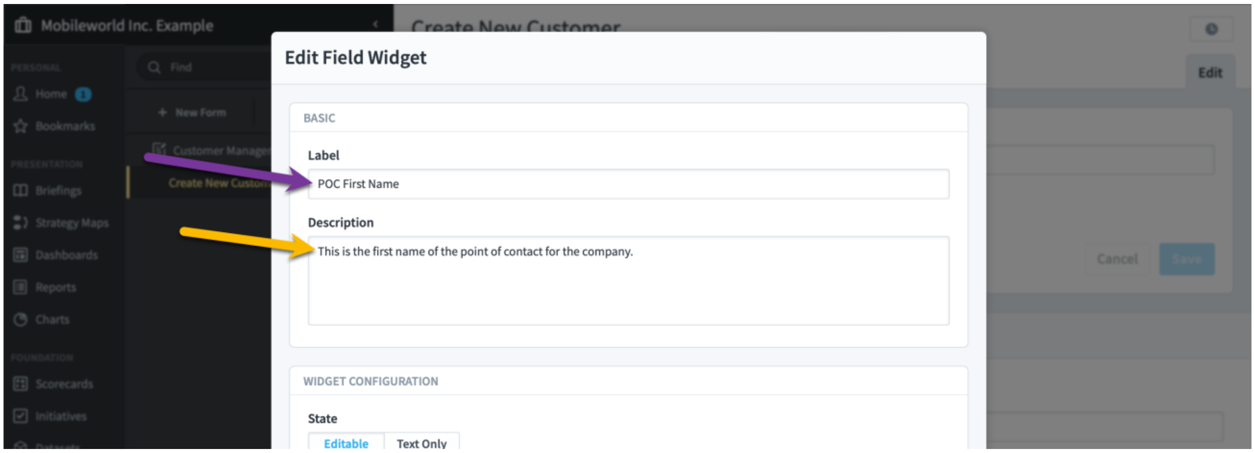


This is what the button looks like when we're done.

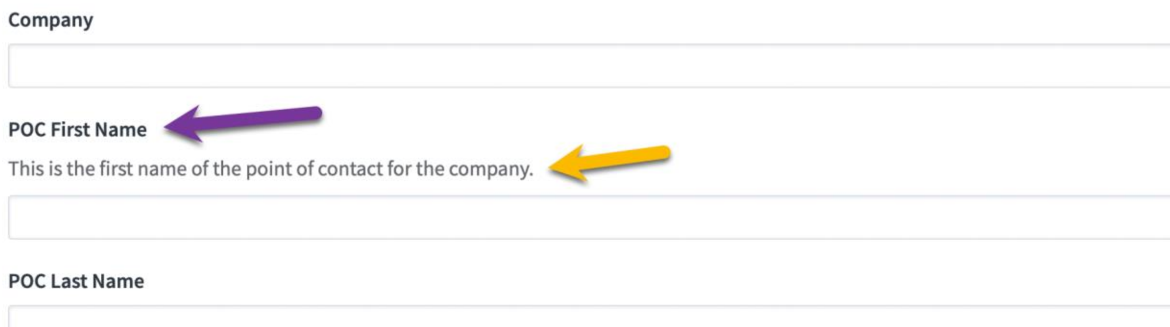


Widget labels and descriptions

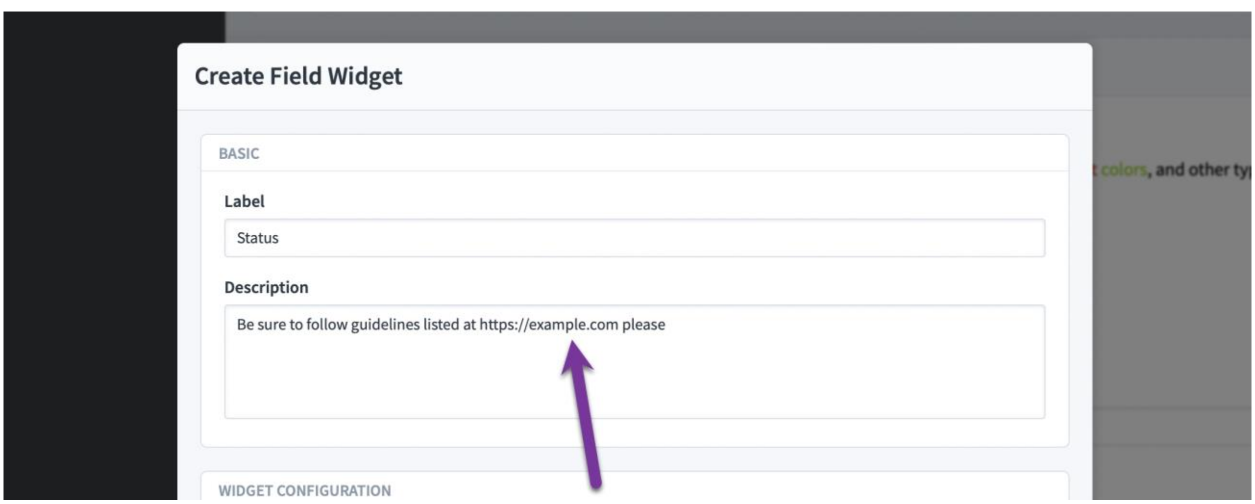
Each type of form widget has different configuration options that are explained in detail below. The two things that are shared by every type of widget, however, are the Label and Description. Both are optional.



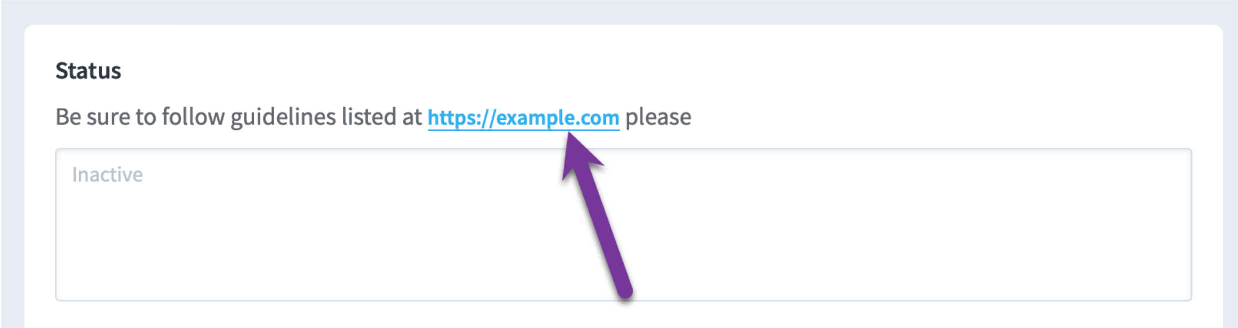
This is what labels and descriptions look like on the form.



Note that all URLs in form widget descriptions are automatically turned into links. In this example, we've added a link to an external web page in the Status field's description.



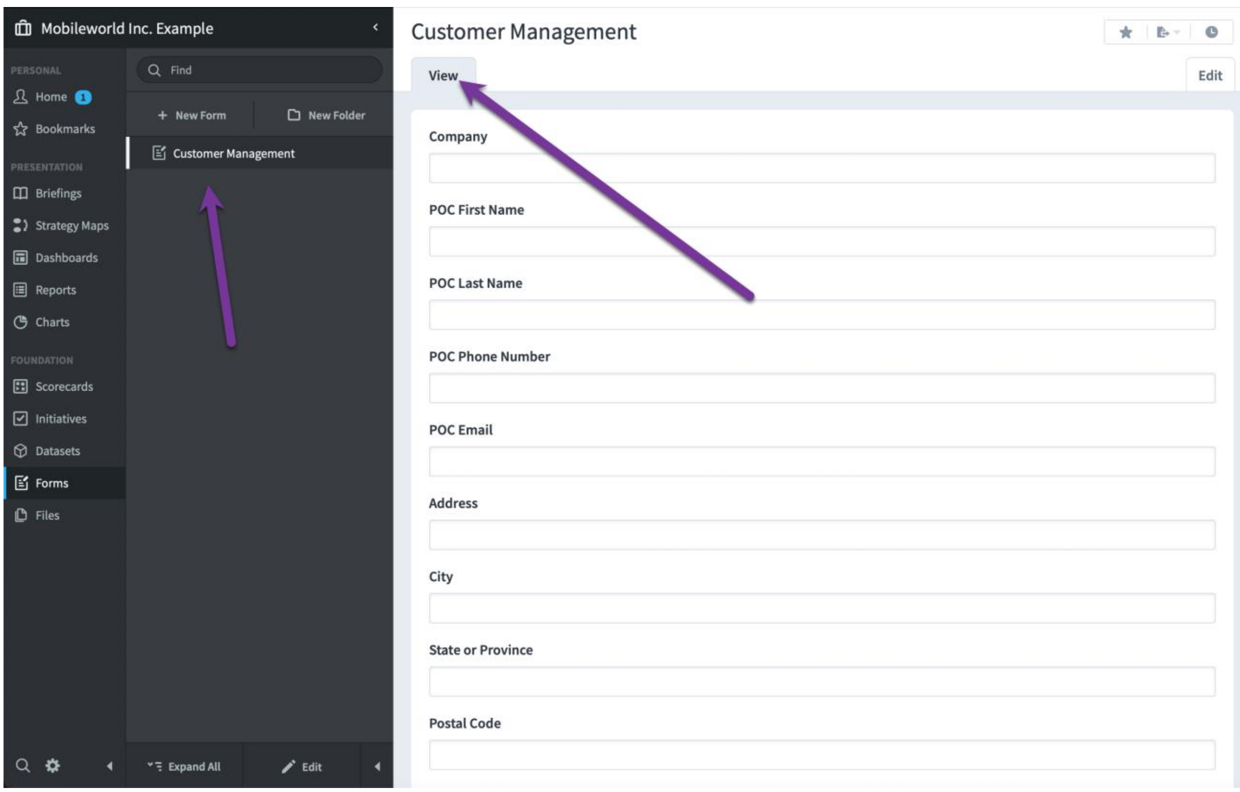
When the form is being used, the link is now styled differently and is clickable.



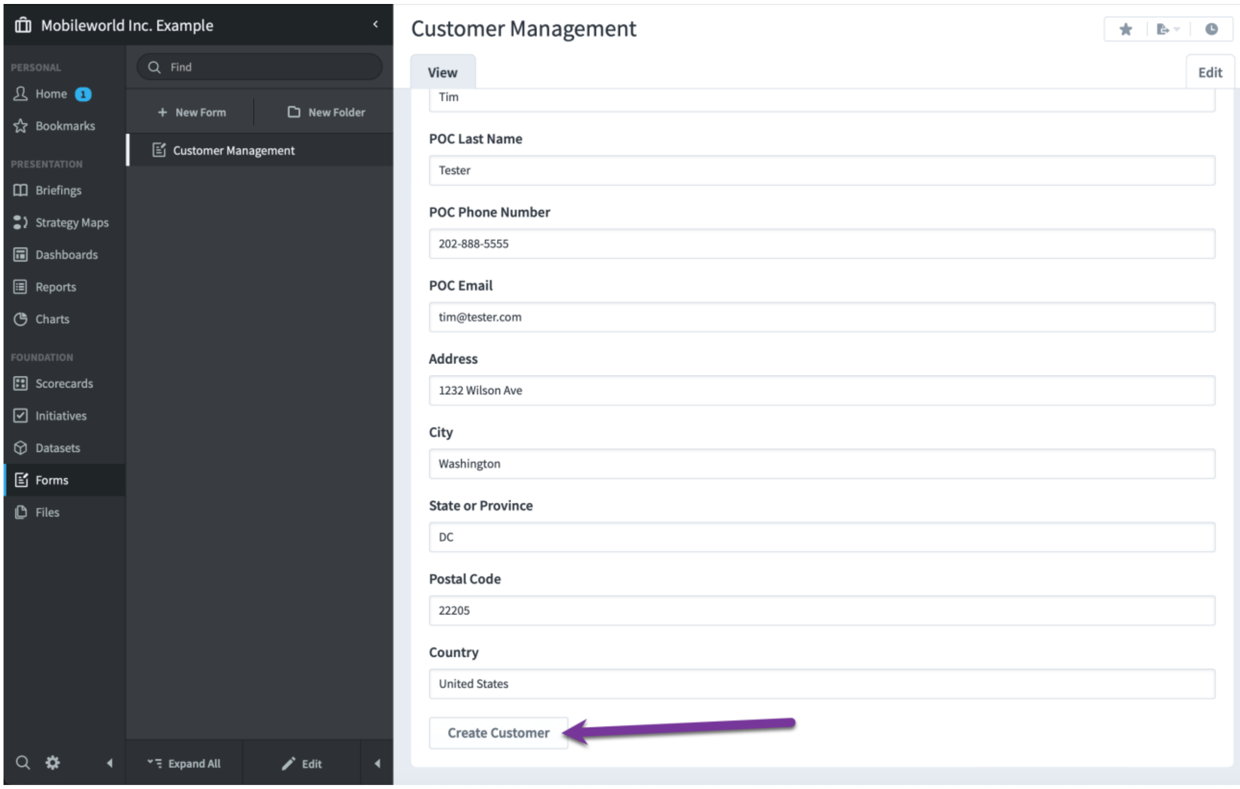
Forms that create records

Example form

The simplest version of a form is a single page that creates a record. To use a form, click the View tab, which is what shows by default when you first visit the forms section. Notice how the individual form pages that you see on the Edit tab no longer show on the View tab.

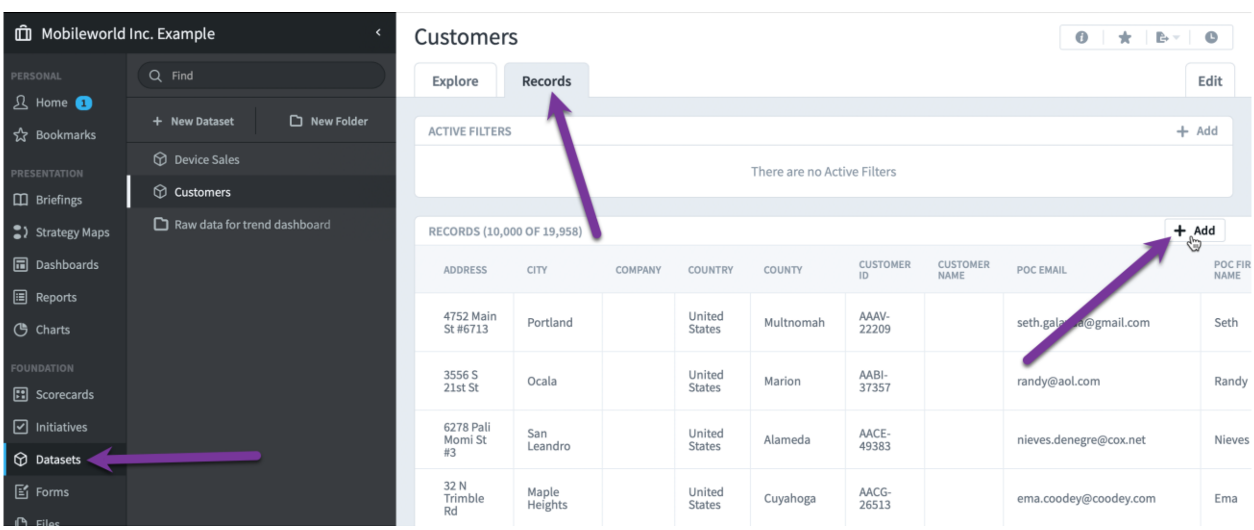


We'll fill out the form with the details for a new customer, and we'll click the "Create Customer" button. This adds a new dataset record for this customer.

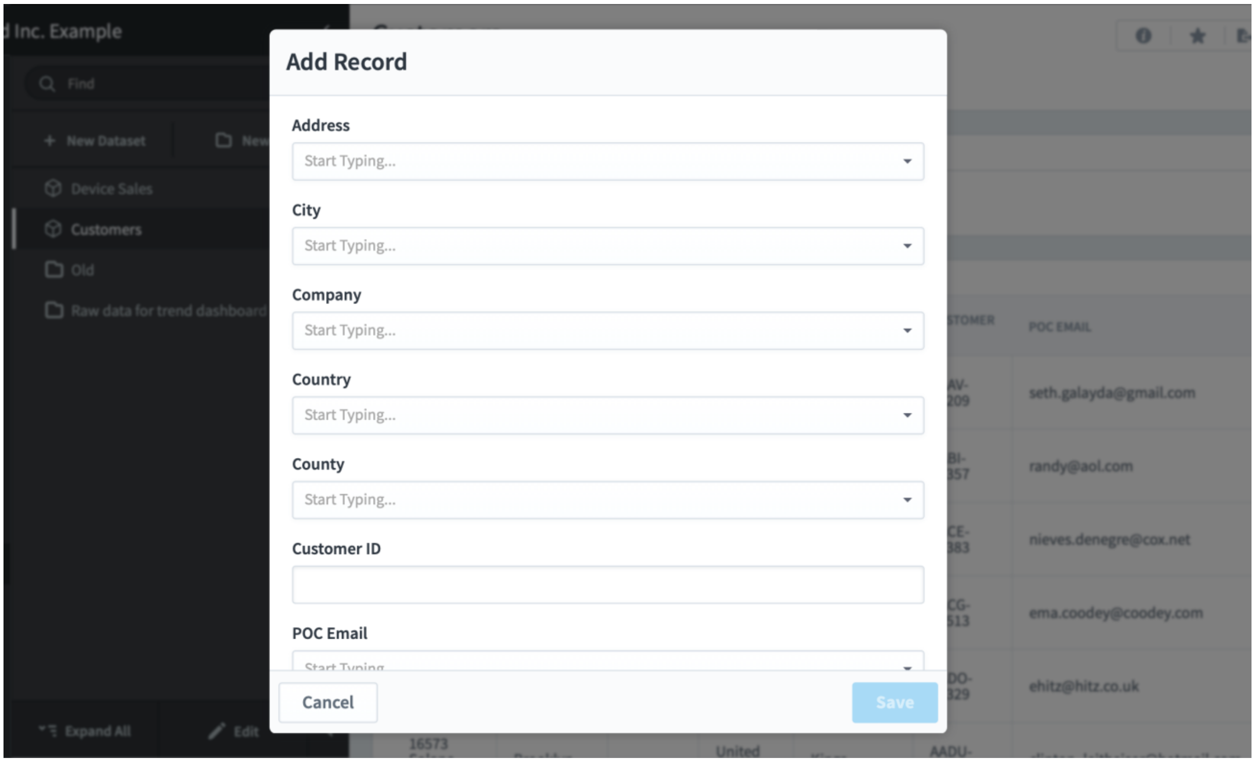


Similarities with Datasets Records tab

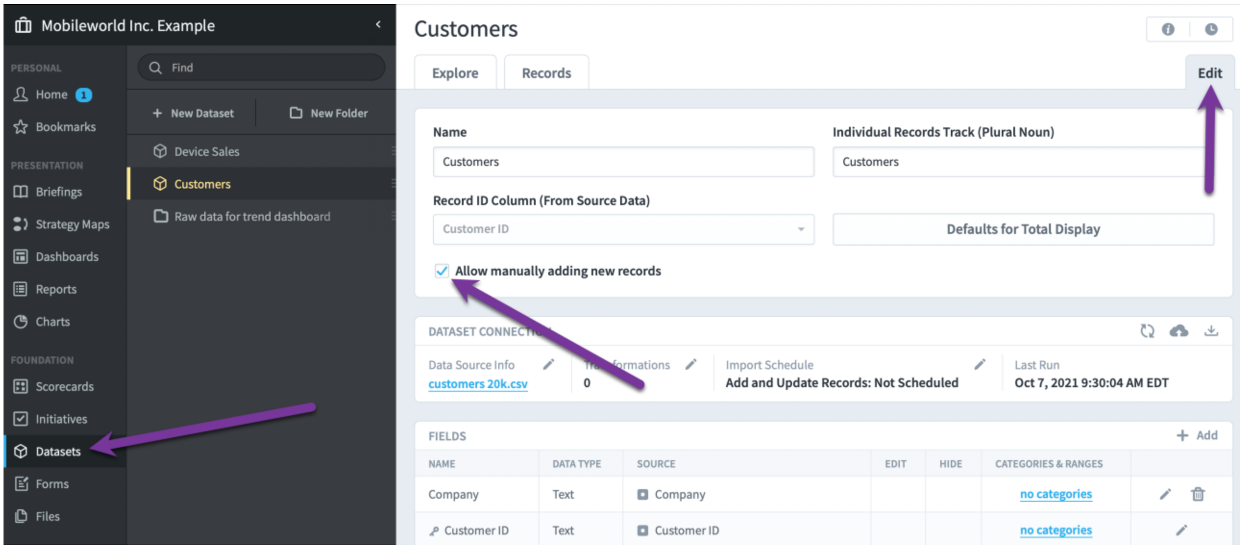
Manually added records will stay in your dataset, even after you import new data with “replace all records”. This is the exact same behavior as adding a record on the Datasets Records tab.



The difference with the Datasets Records tab is that you have no control over layout, no way to break data entry into multiple pages, and no way to do logic and advanced data validation. In short, the Dataset Records tab is a simple list of fields, and the Forms section is for building mini-apps to collect data.



All of the user permissions that apply to adding records on the Datasets Records tab also apply to forms. For example, people can only create new records with a form if "Allow manually adding new records" is checked on the dataset's Edit tab. See the Manually Adding & Updating Records knowledge base article for more information.
https://support.spiderstrategies.com/hc/en-us/articles/4408588410388-Advanced-Manually-Adding-Updating-Records

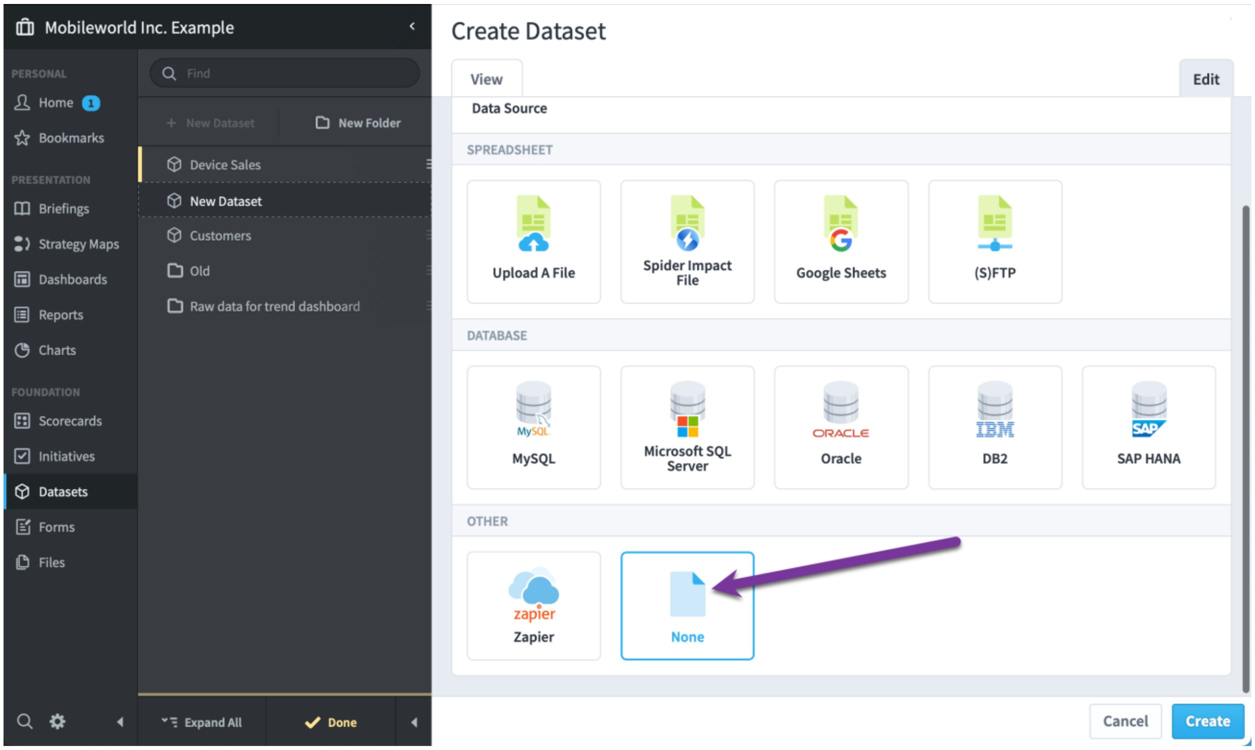


Reasons for adding records

There are two situations when adding records to datasets make sense. The first is when you're not in control of the system of record that your dataset is built from, but you want to supplement it with additional records.

For example, let's say your Employees dataset is built from a data connection to your HR software. The HR software doesn't track unpaid summer interns, but you want to include the intern data with the other employees on your Spider Impact dashboards and reports. In this situation you could create a form to manage the summer interns. It would add additional records to the employees dataset to supplement all of the records that are from the HR system. These new supplementary records would stay around, even after new HR data is imported.

The more common use case for adding records to datasets is when there isn't a system of record and you're starting with a blank dataset. For example, maybe you want to send out a survey to customers, or you want to start tracking your company's computer hardware. In these situations you can create a dataset with no Data Source and manually create fields.



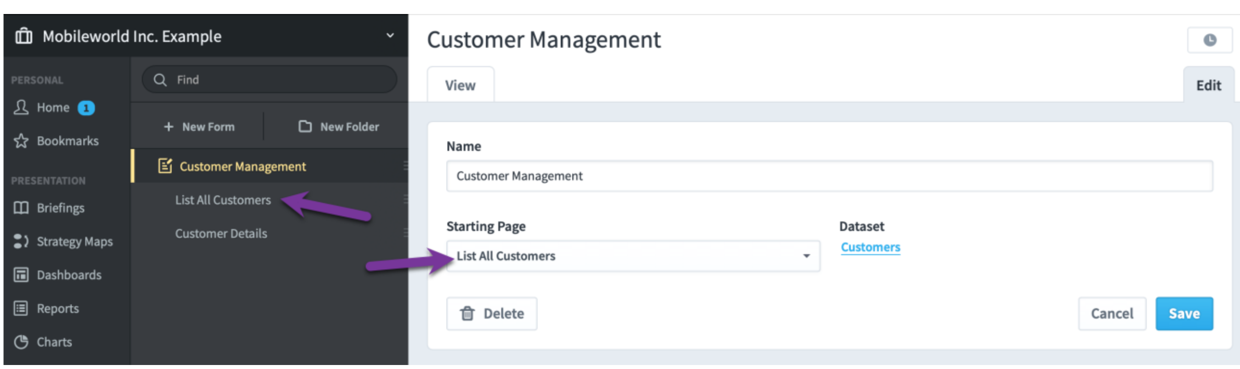
Another option is to choose a Spreadsheet as the Data Source and just not include any records in the spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Customer ID	POC First Na	POC Last Nai	POC Phone N	POC Email	Company	Address	City	County	State or Prov	Postal Code	Country
2												
3												
4												
5												

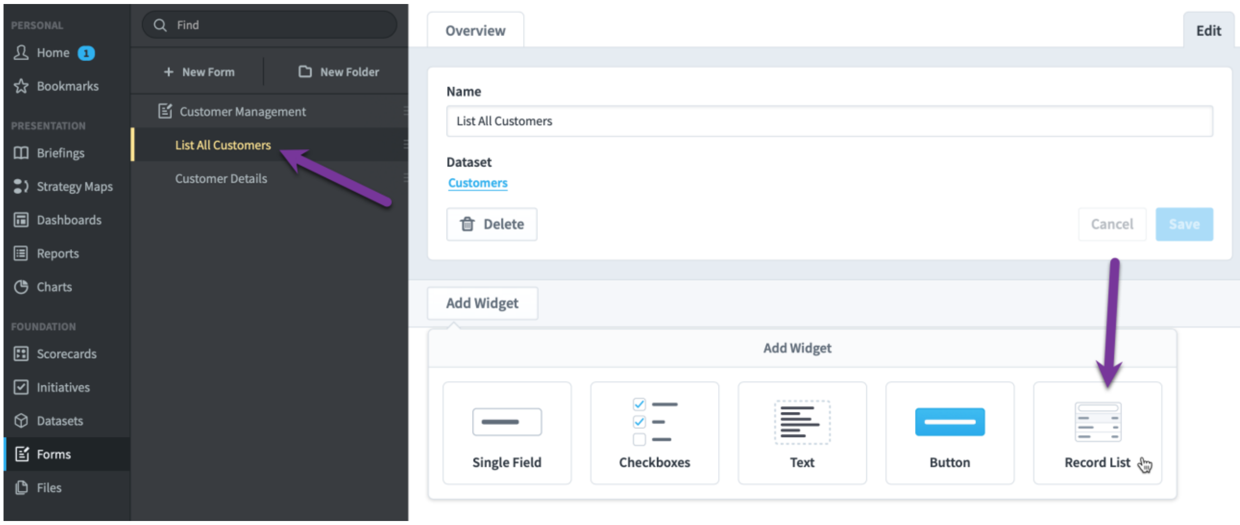
Forms that edit records

Example form

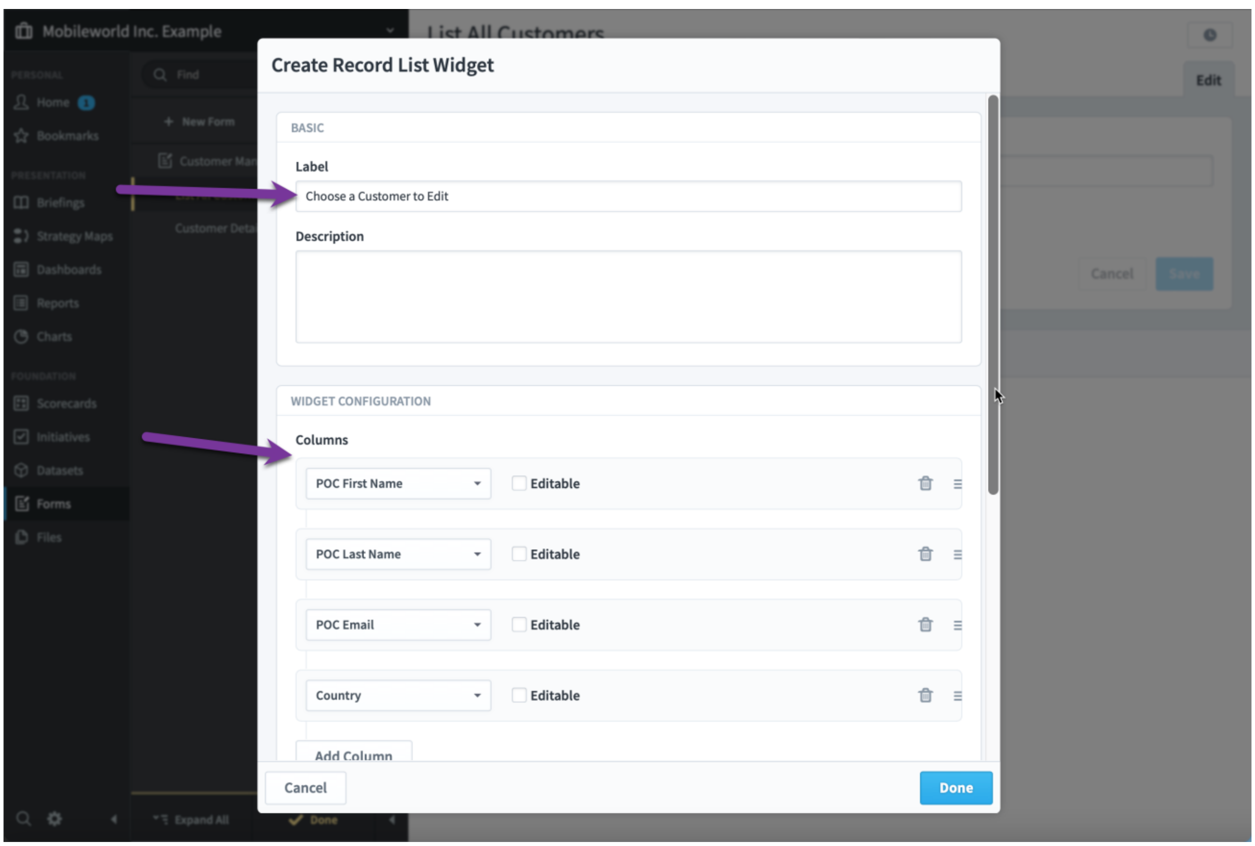
We'll add a second page to our form called "List All Customers" and set it as the form's Starting Page.



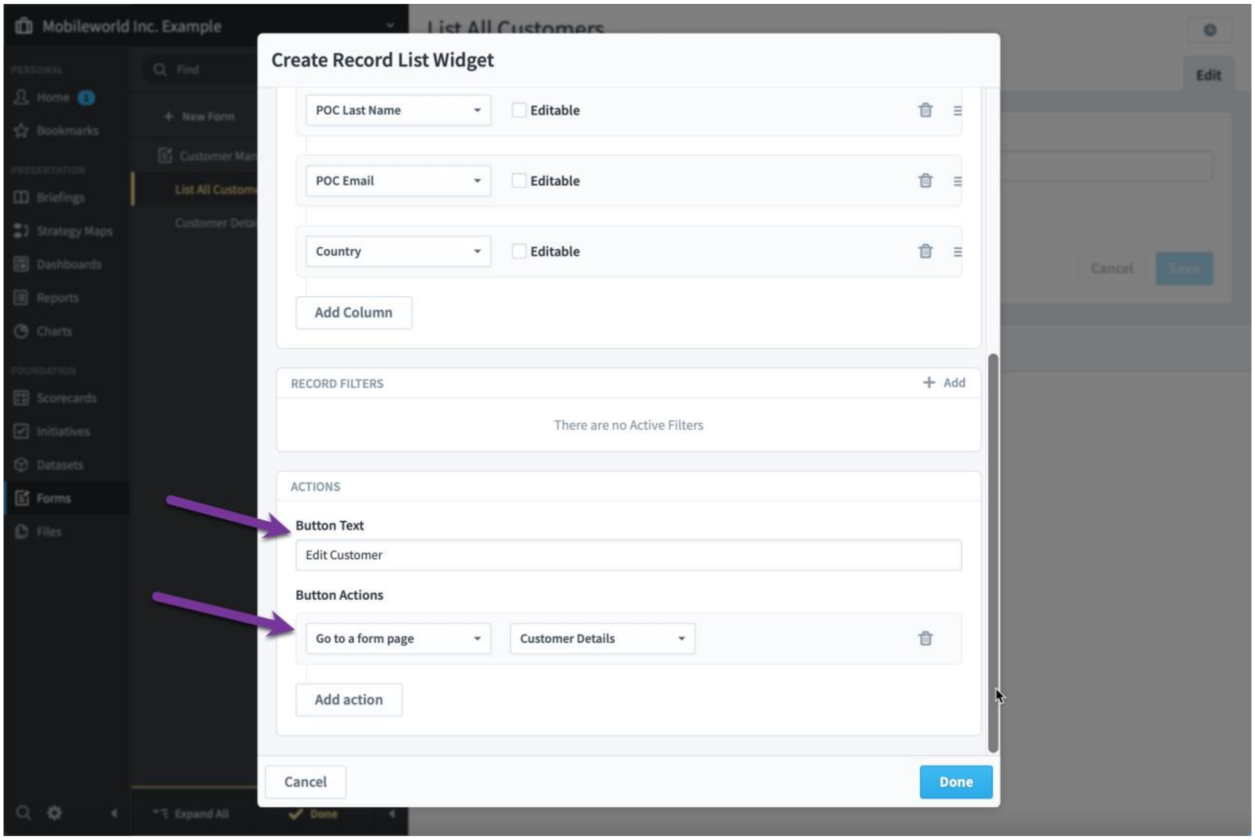
On this new blank page we'll add a Record List widget.



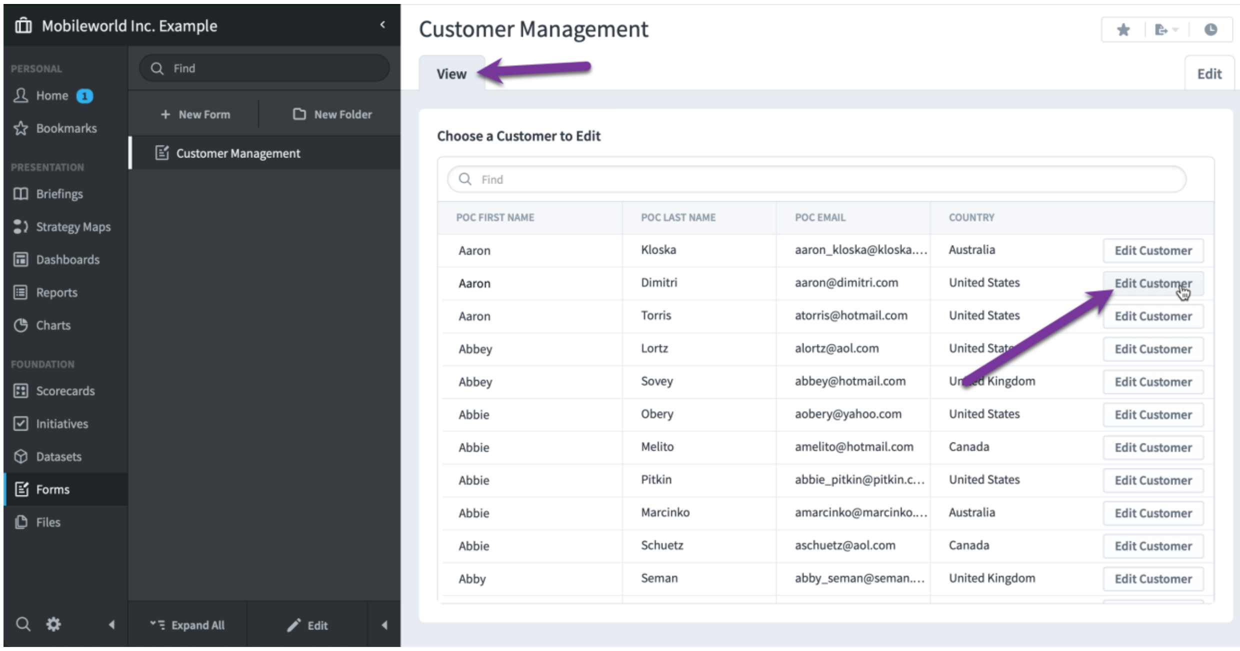
Our Record List widget will have a title of "Choose a Customer to Edit", and we're going to choose to show the customer fields of first name, last name, email, and country to identify each record.



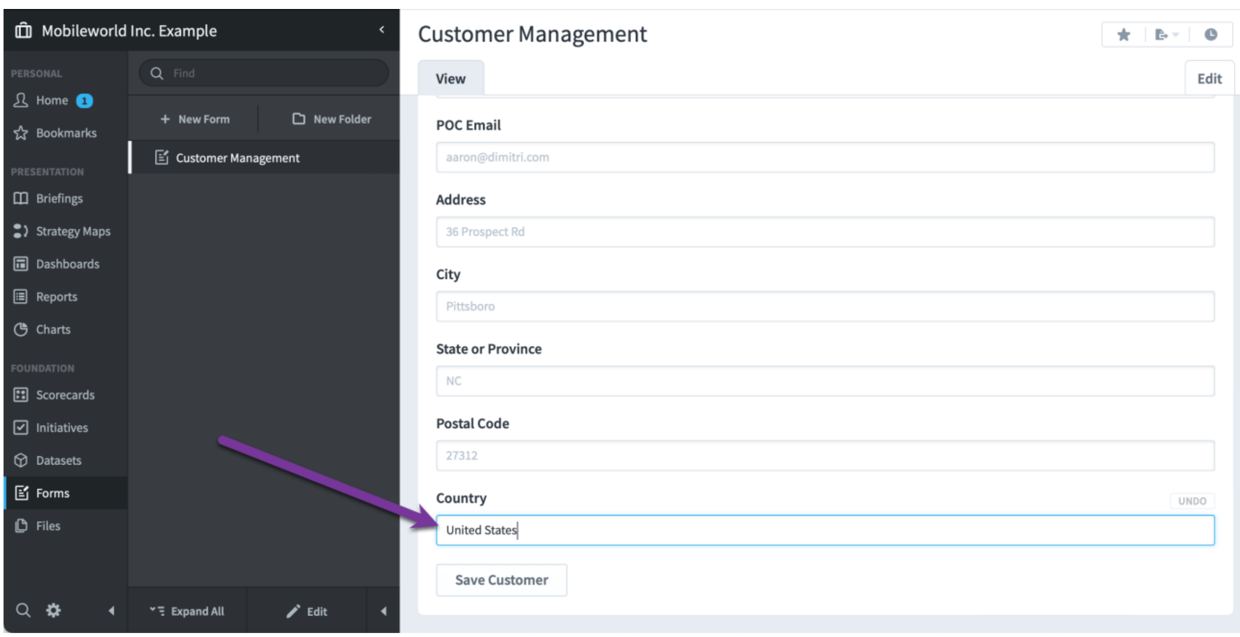
We're also going to have an action button in our Record List widget. Each record will have an "Edit Customer" button that goes to the "Customer Details" page for that record when clicked.



Now when I go to the View tab to use the form, it lists all of the records in the Customer dataset.

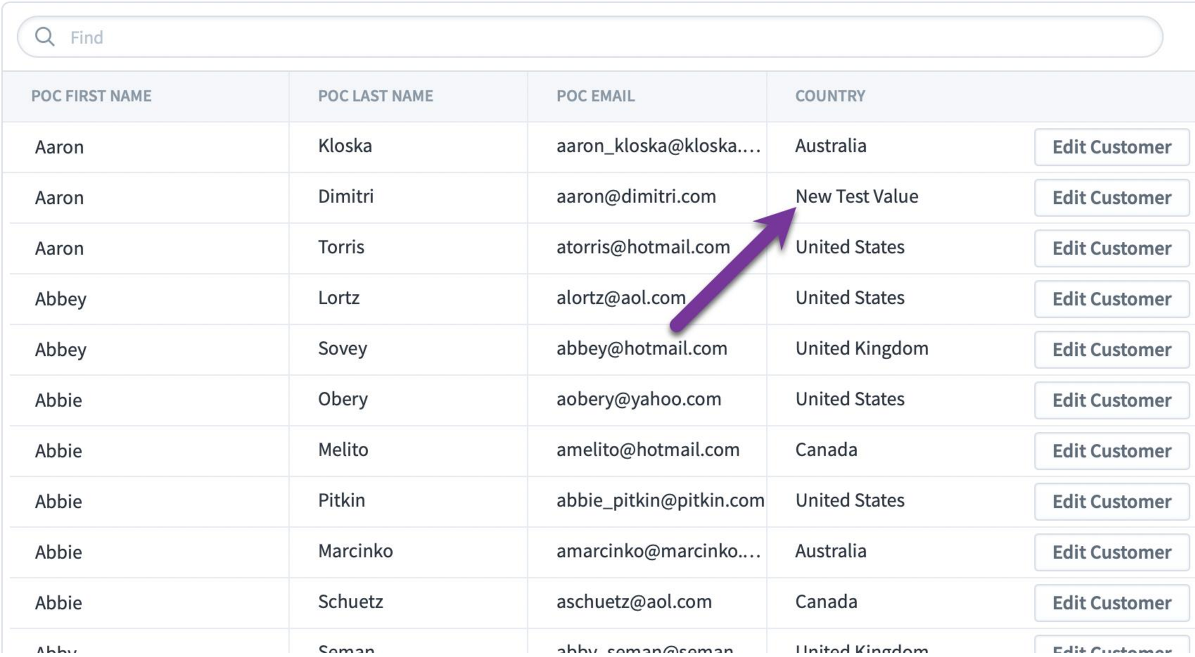


When I click the "Edit Customer" button for one of the records, it goes to the Customer Details page for that record.



The Country field is editable, so we'll change that to "New Test Value" and click Save Customer. The form goes back to the customer list and we can see this new country value.

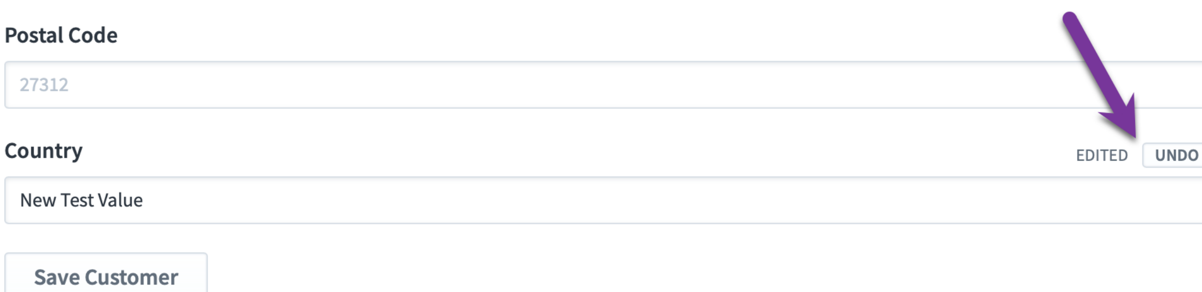
Choose a Customer to Edit



Find

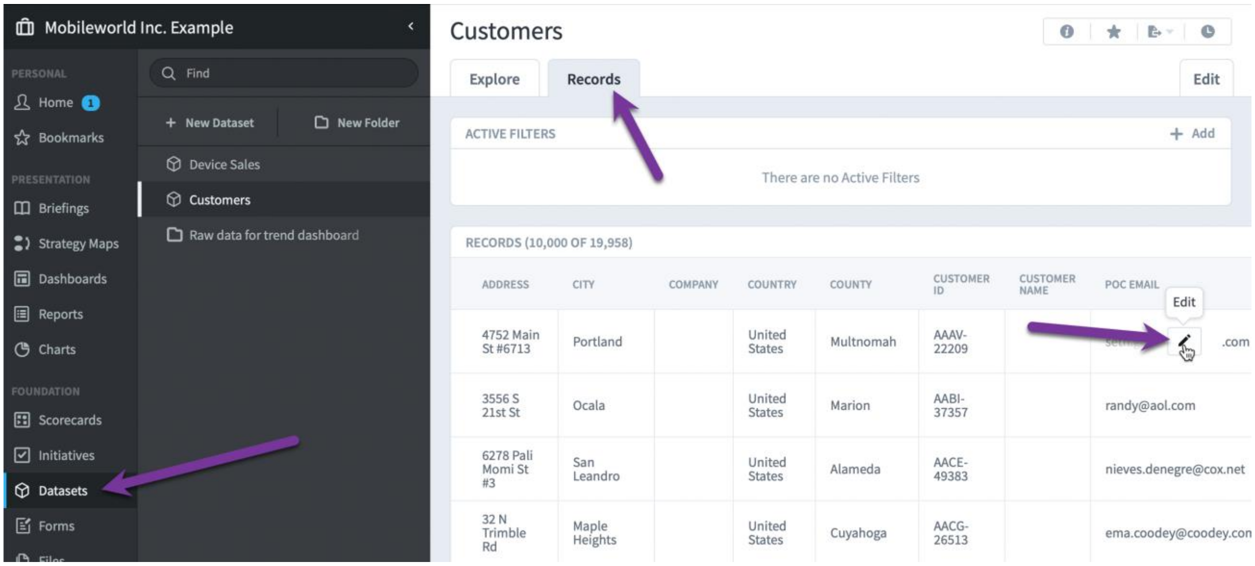
POC FIRST NAME	POC LAST NAME	POC EMAIL	COUNTRY	
Aaron	Kloska	aaron_kloska@kloska.…	Australia	Edit Customer
Aaron	Dimitri	aaron@dimitri.com	New Test Value	Edit Customer
Aaron	Torris	atorris@hotmail.com	United States	Edit Customer
Abbey	Lortz	alortz@aol.com	United States	Edit Customer
Abbey	Sovey	abbey@hotmail.com	United Kingdom	Edit Customer
Abbie	Obery	aobery@yahoo.com	United States	Edit Customer
Abbie	Melito	amelito@hotmail.com	Canada	Edit Customer
Abbie	Pitkin	abbie_pitkin@pitkin.com	United States	Edit Customer
Abbie	Marcinko	amarcinko@marcinko.…	Australia	Edit Customer
Abbie	Schuetz	aschuetz@aol.com	Canada	Edit Customer

When we click the Edit Customer button for this record, we can now see that its imported value is being overridden. We can type a different value, or we can click "Undo" to go back to the imported value.

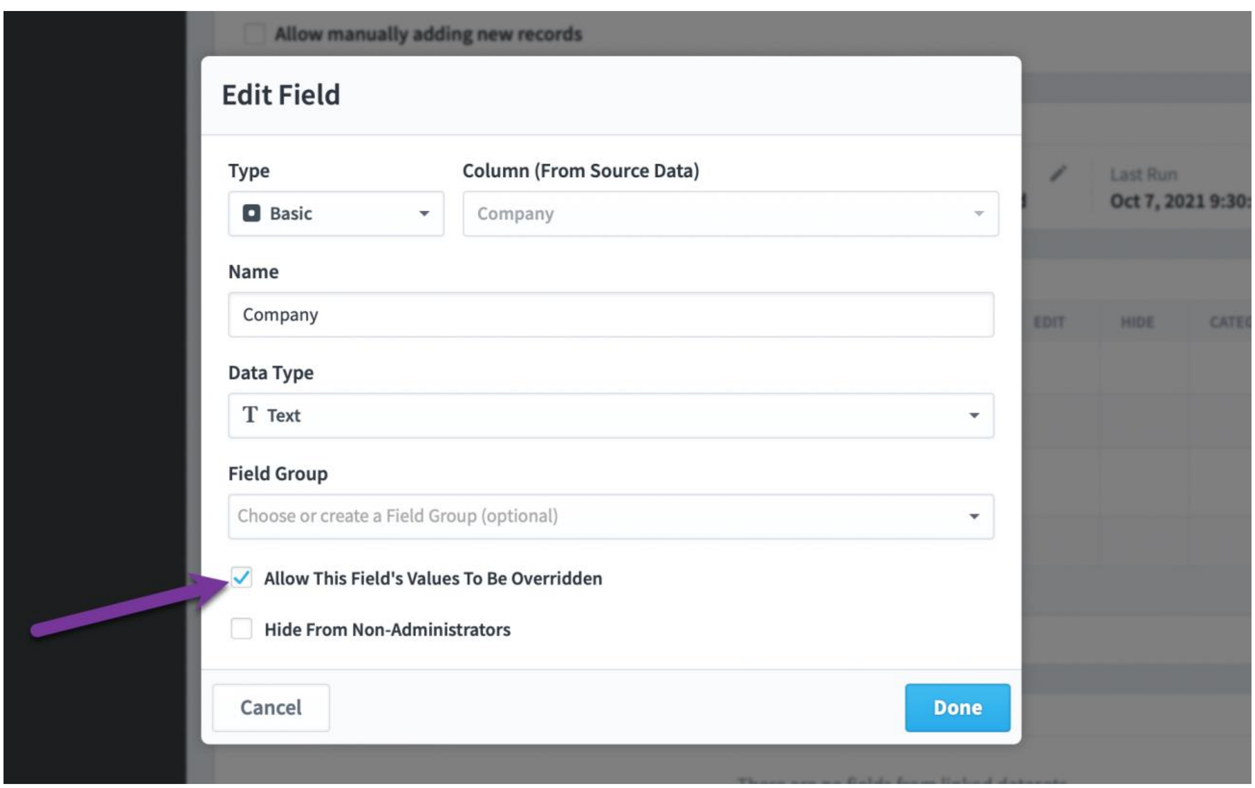


Similarities with Datasets Records tab

If you're editing a record that came from a data import rather than being manually added, this new value that you entered will stay in the dataset, even after you import new data with "replace all records" later. This is the exact same behavior as editing a record on the Datasets Records tab.



All of the user permissions that apply to editing records on the Datasets Records tab also apply to forms. That means you can only override imported values in a form if that dataset field has "Allow This Field's Values To Be Overridden" checked on the dataset's Edit tab. See the Manually Adding & Updating Records knowledge base article for more information. https://support.spiderstrategies.com/hc/en-us/articles/4408588410388-Advanced-Manually-Adding-Updating-Records



Reasons for editing imported records

There are two reasons for editing fields in records that are imported from a system of record. The first is when you're not in control of the system of record that your dataset is built from, but you want to correct its data.

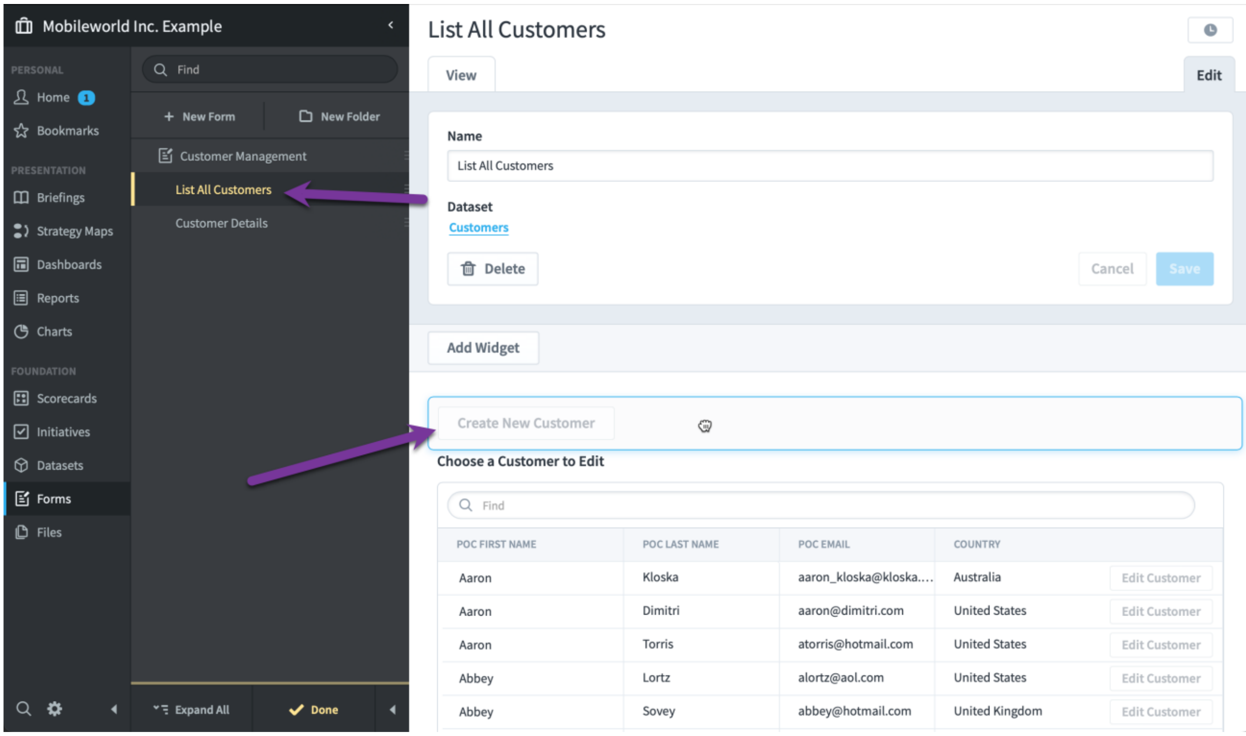
For example, let's say your Employees dataset is built from a data connection to your HR software. If you notice that a few of the employees' departments are either incorrect or missing, the best approach is to fix the data in the system of record, and then the corrected values will show up in Spider Impact. If that isn't possible for some reason, however, you can override the values in Impact and they'll stay overridden even after the next import.

The more common use case for editing an imported record, however, is adding supplementary fields that don't exist in the system of record. For example, let's say you want to track each employee's t-shirt size, and that's not something your HR software does. You can just add a T-Shirt Size field to the Employees dataset and then enter those values using an Employees dataset form.

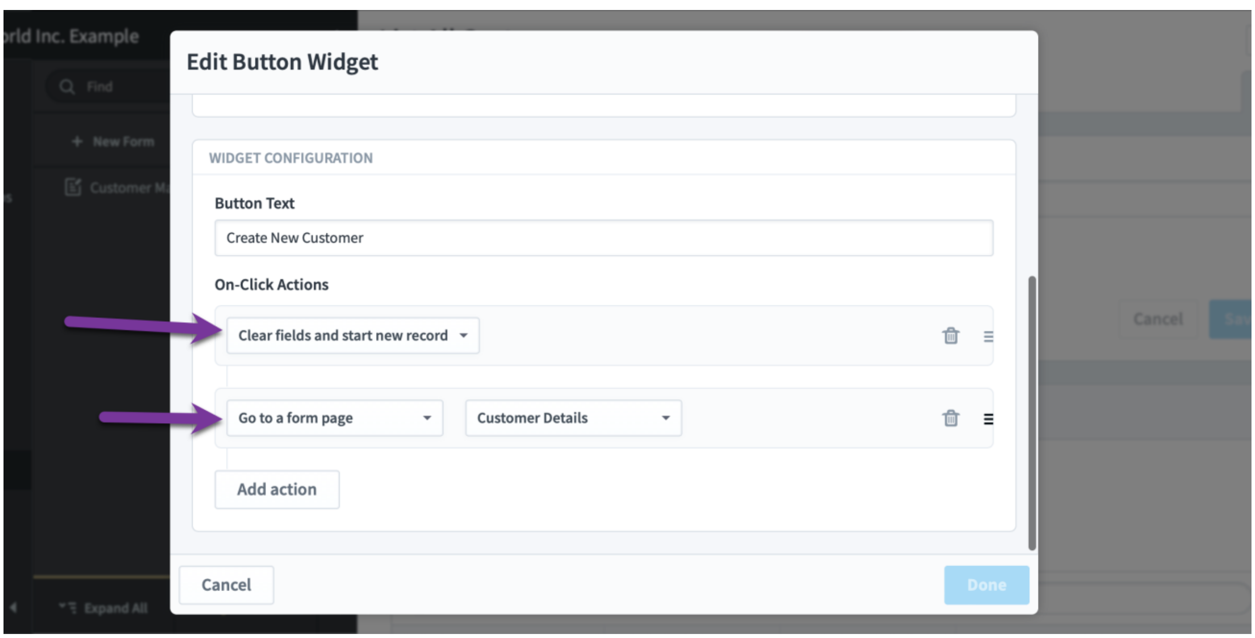
Forms that edit and add records

Example form

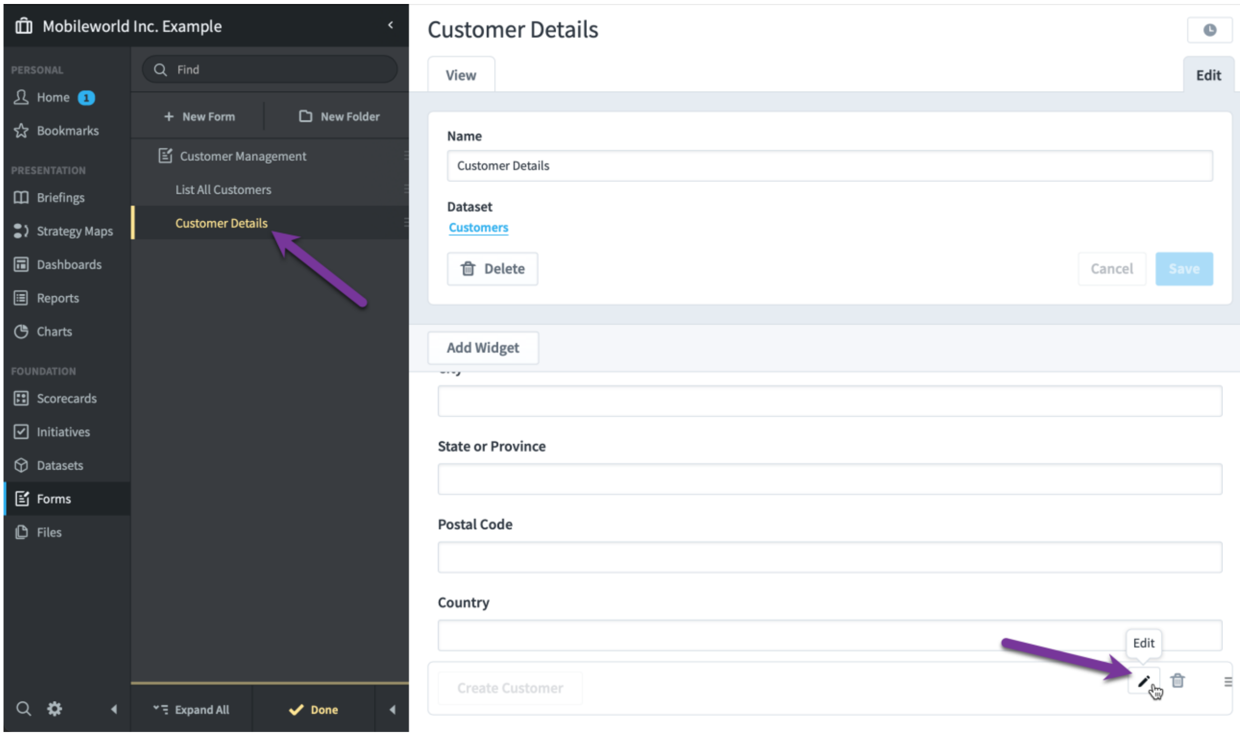
We've given examples above of forms that add records and forms that edit records, but forms can also do both. Here we're adding a "Create New Customer" button to the form's starting page.



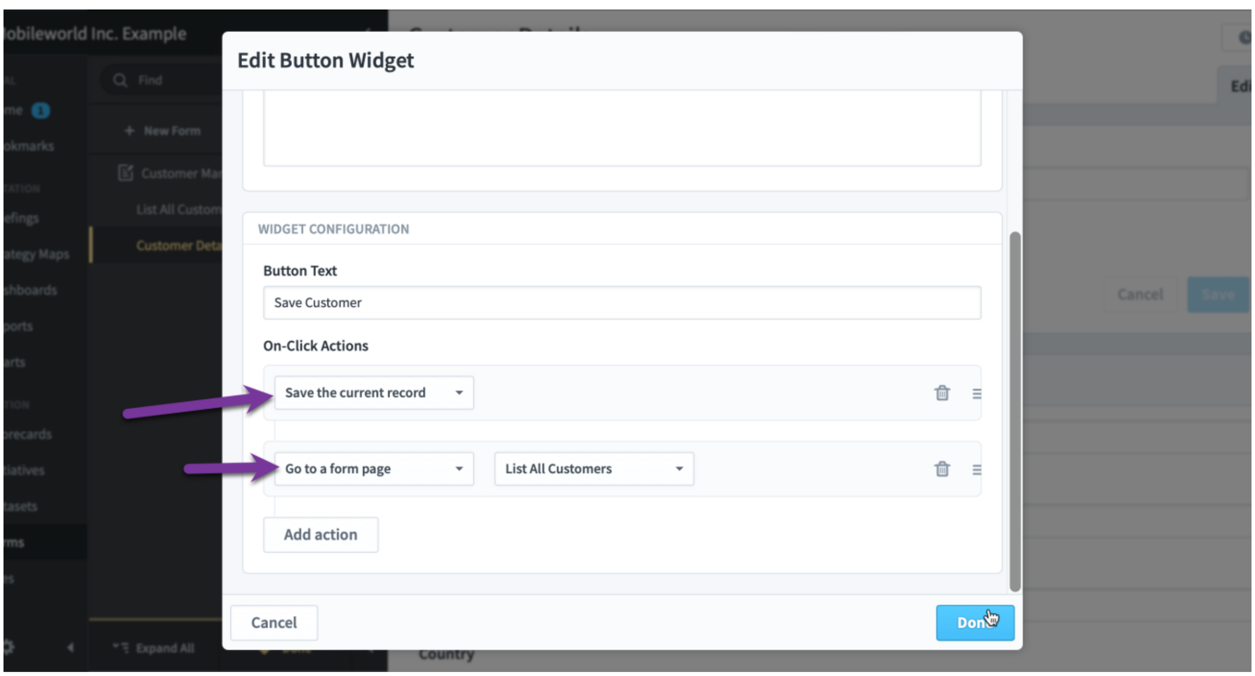
This new button has two actions. First it clears fields and starts a new record. Second, it goes to the customer details page.



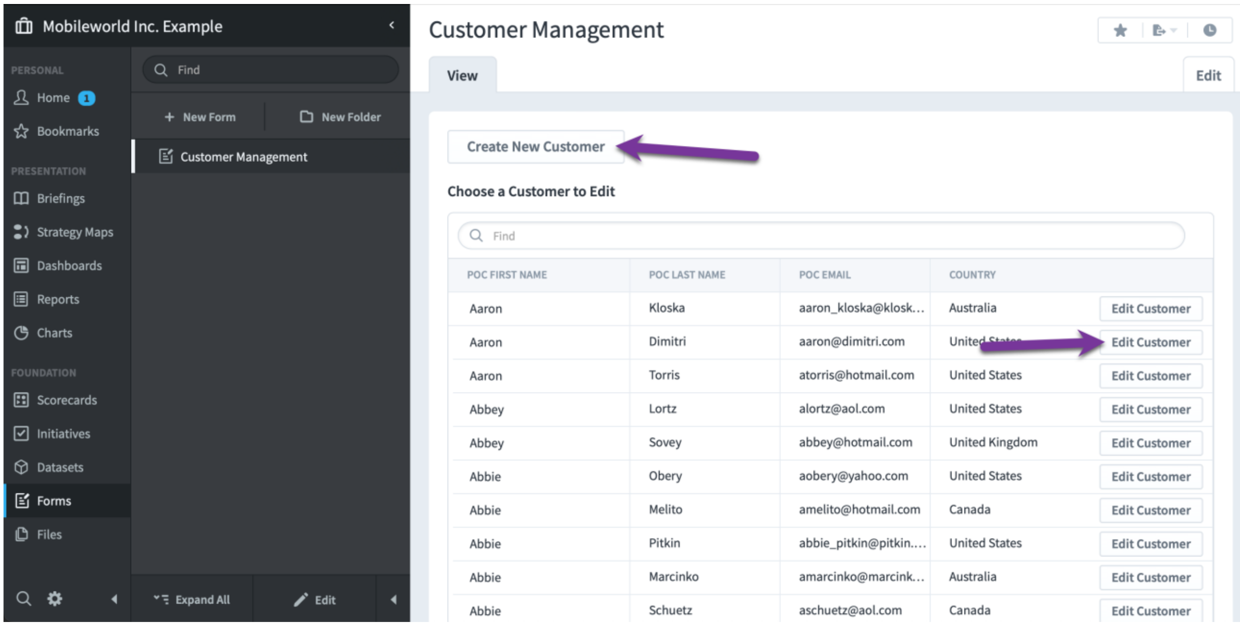
We'll also edit the button that's on the Customer Details page.



It's now going to go back to the "List All Customers" page after saving the record. We'll also change the button's name to simply "Save Customer" because this page is going to be used to both create and edit customer records.



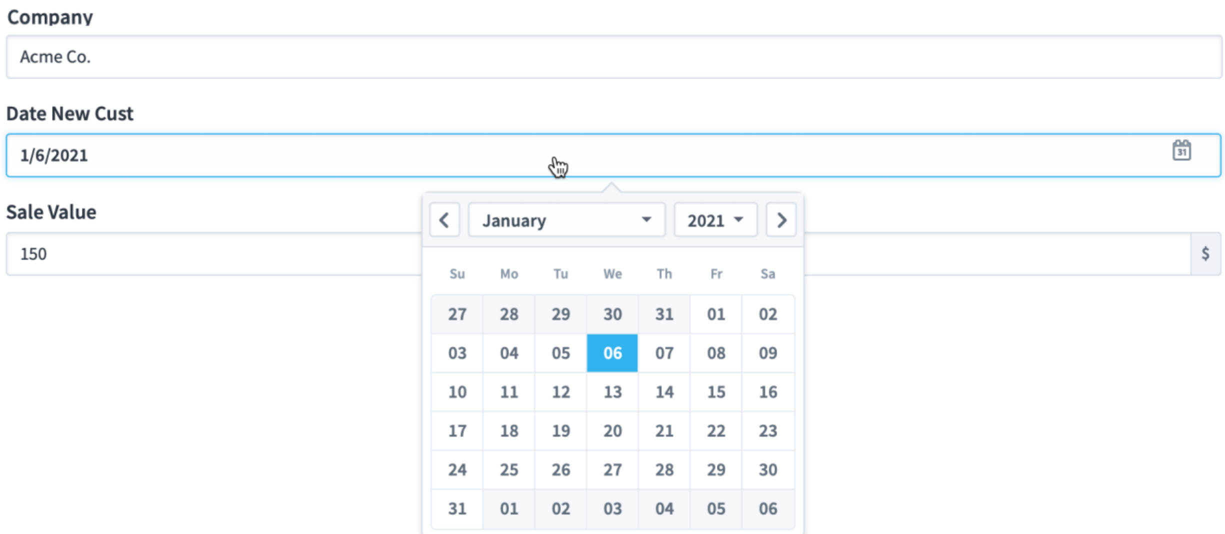
Now when we go to the View tab, we can choose between two different types of actions. We can click on the "Create New Customer" button, which takes us to the "Customer Details" page to create a new record. Or, we can click on a record's "Edit Customer" button. This also takes us to the "Customer Details" page, but we'll be editing the existing record.



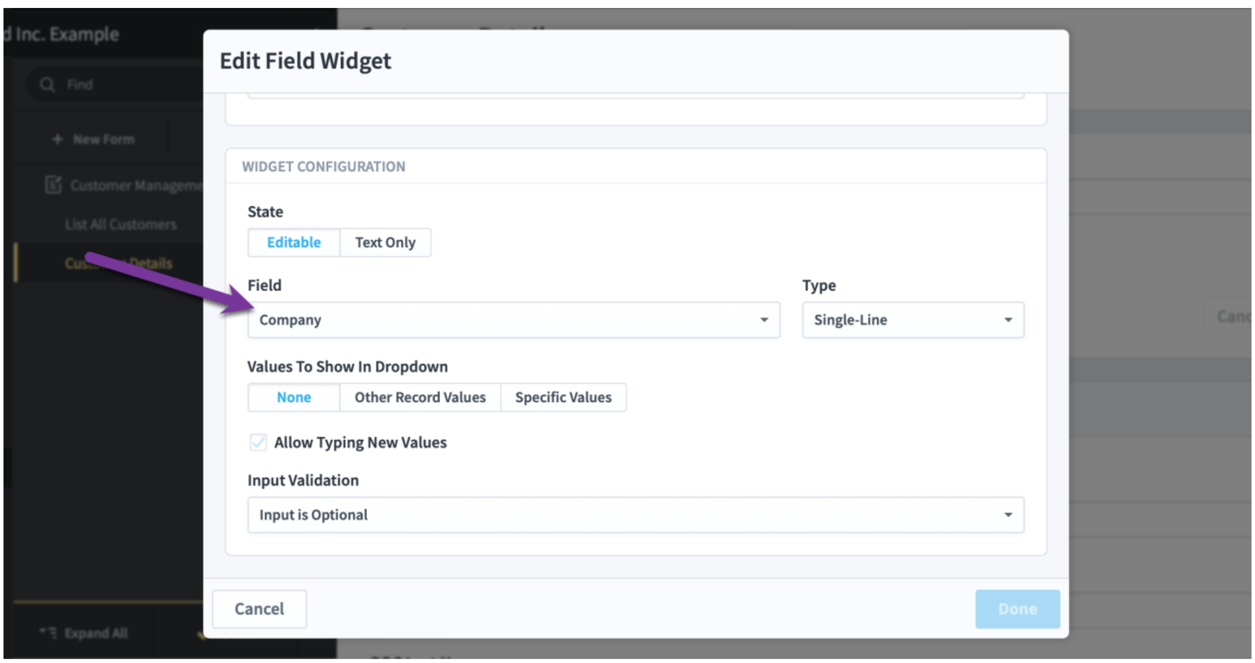
Regardless of whether you're adding or editing a record, the form will go back to the "List All Customers" starting page when we click the "Save Customer" button.

Single Field widgets

The most common form widget is the Single Field widget. This allows you to enter the value for a single field, with slightly different controls based on that field's data type.

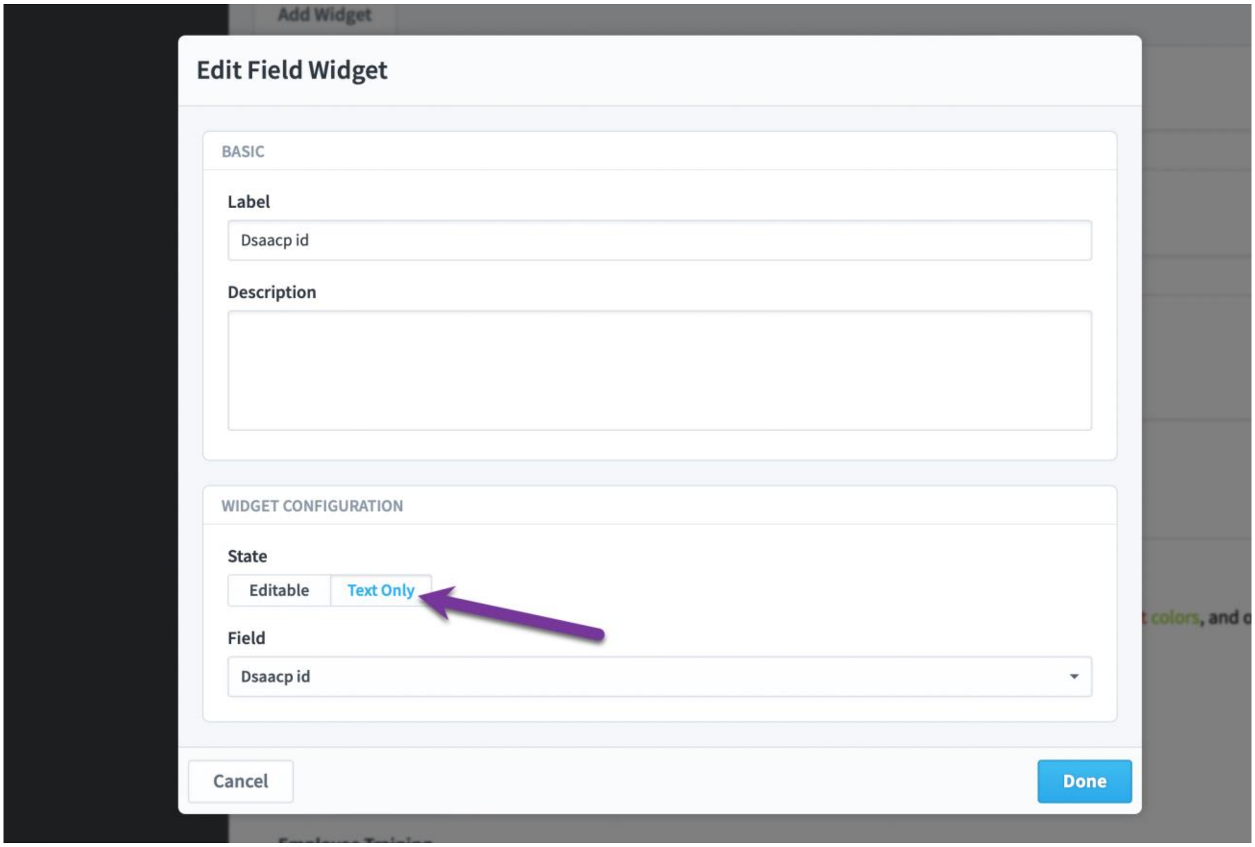


You can change the field used by the widget in the widget's Edit dialog.

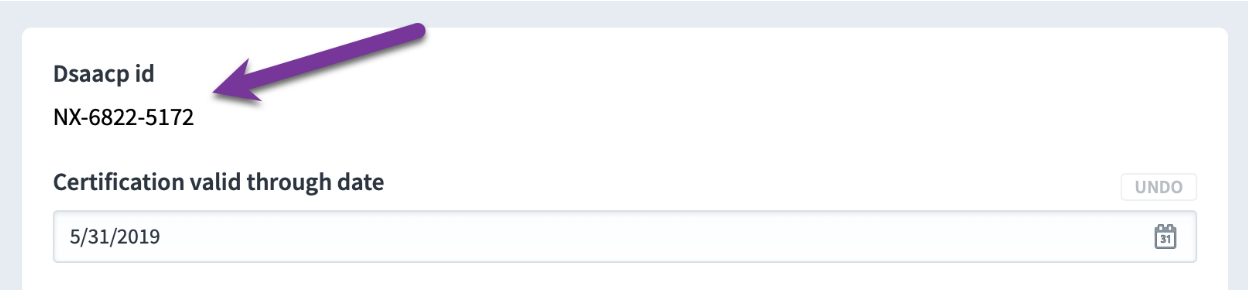


State: Editable or Text only

Most of the time you'll want single value widgets to be Editable. If we just want to show the value of the field for reference, however, you can change a single value widget's state to Text Only.

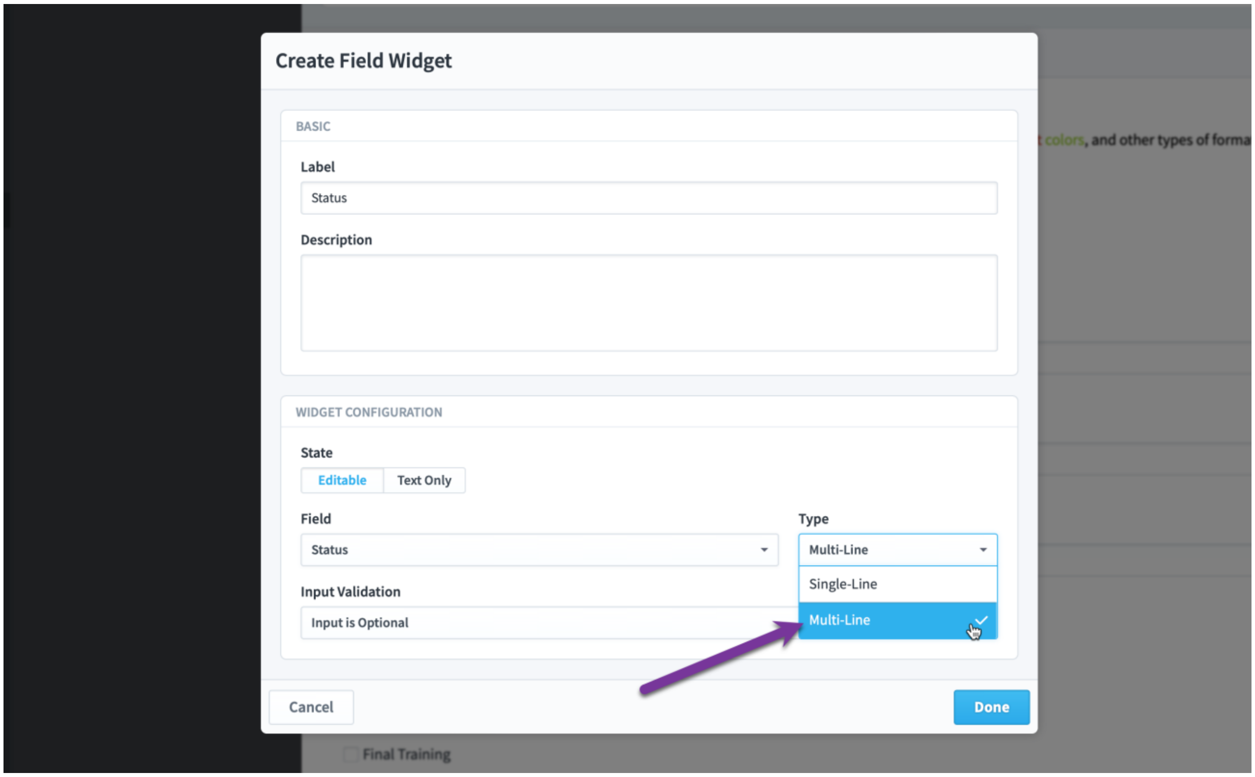


This is what a Text Only single value widget looks like when you're using a form.

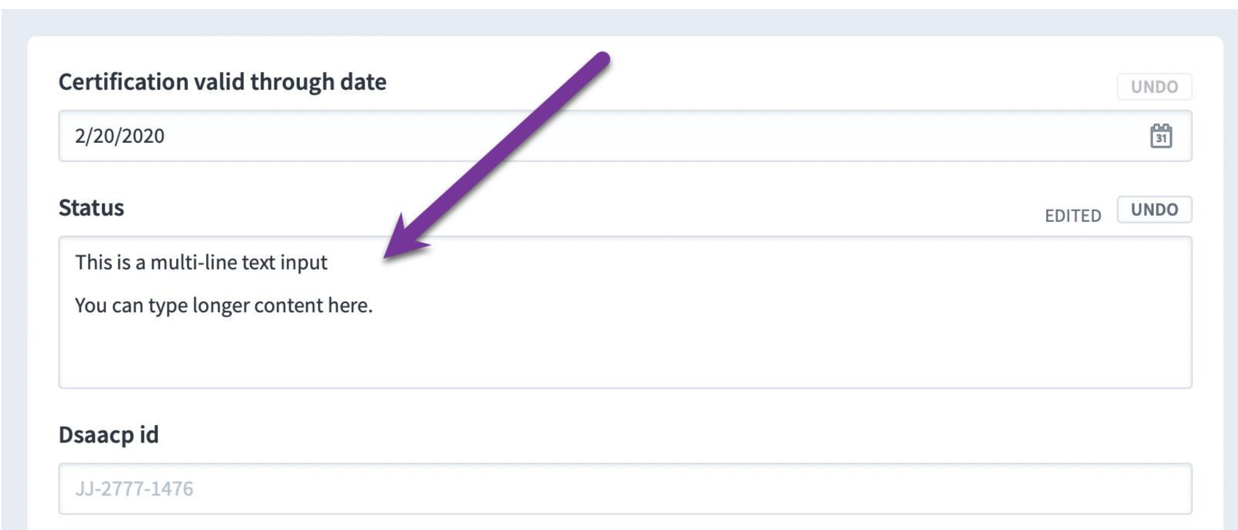


Type: Single line or Multi line

Single value widgets will often be Single-Line, but you can also change their Type to Multi-Line.

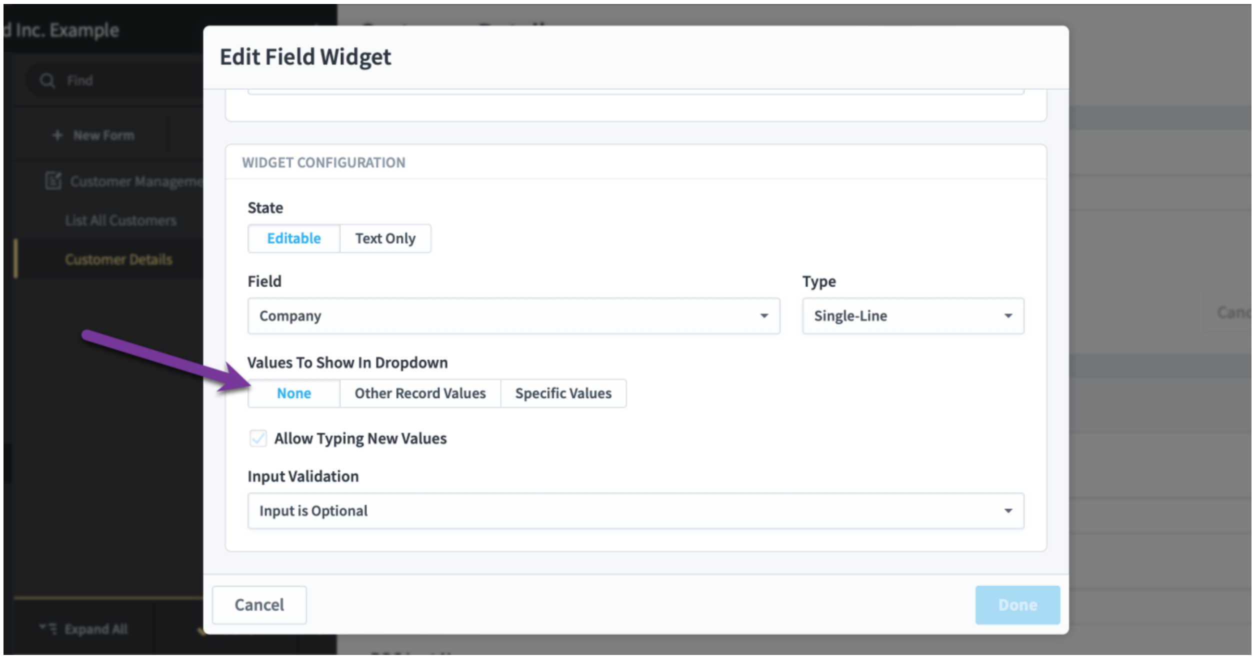


This allows forms to collect paragraph-stye text.



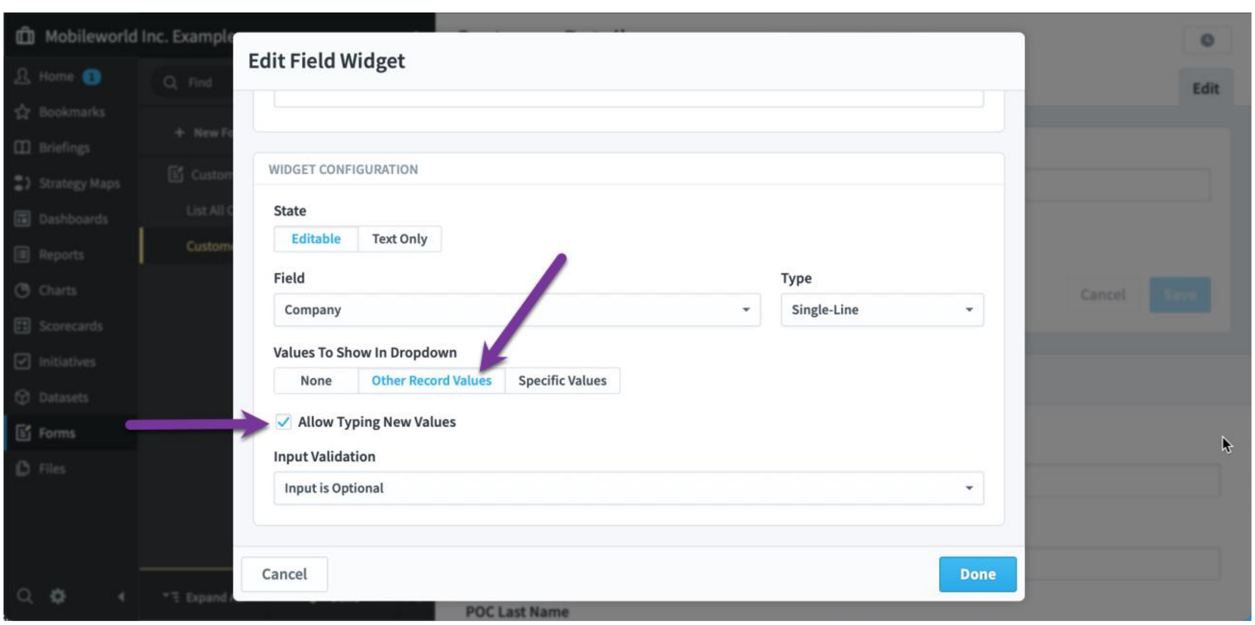
Values to show in Dropdown

One of the most useful features of forms is the ability to make data entry easier. The default option for "Values to Show in Dropdown" is None.

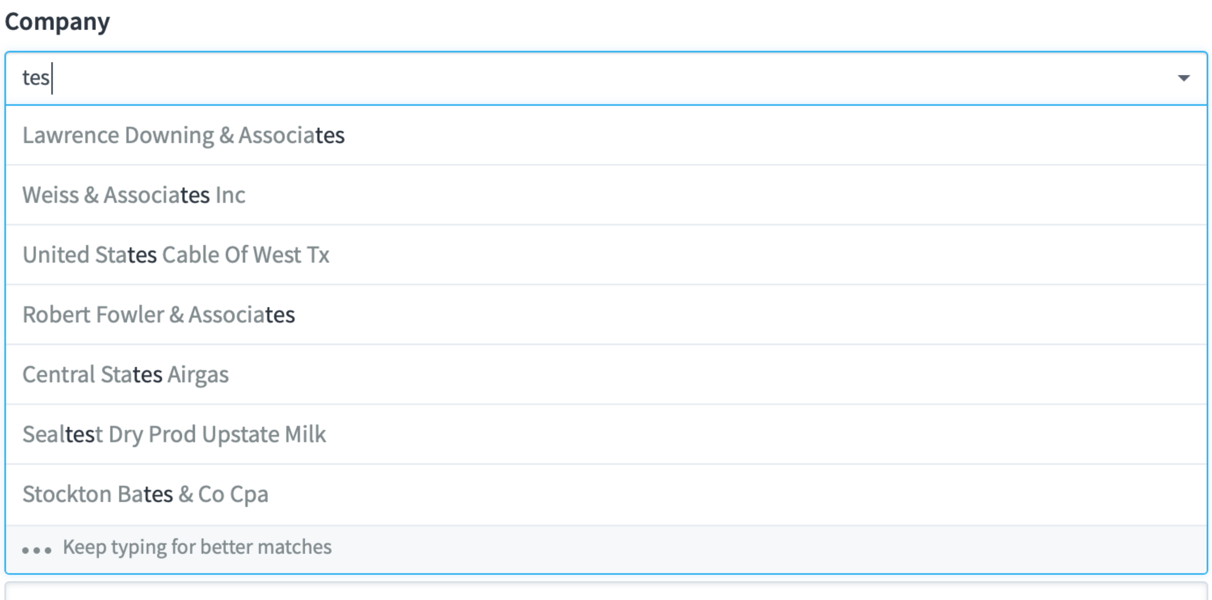


This allows the form's users to type in any value they want in a field that looks like this.

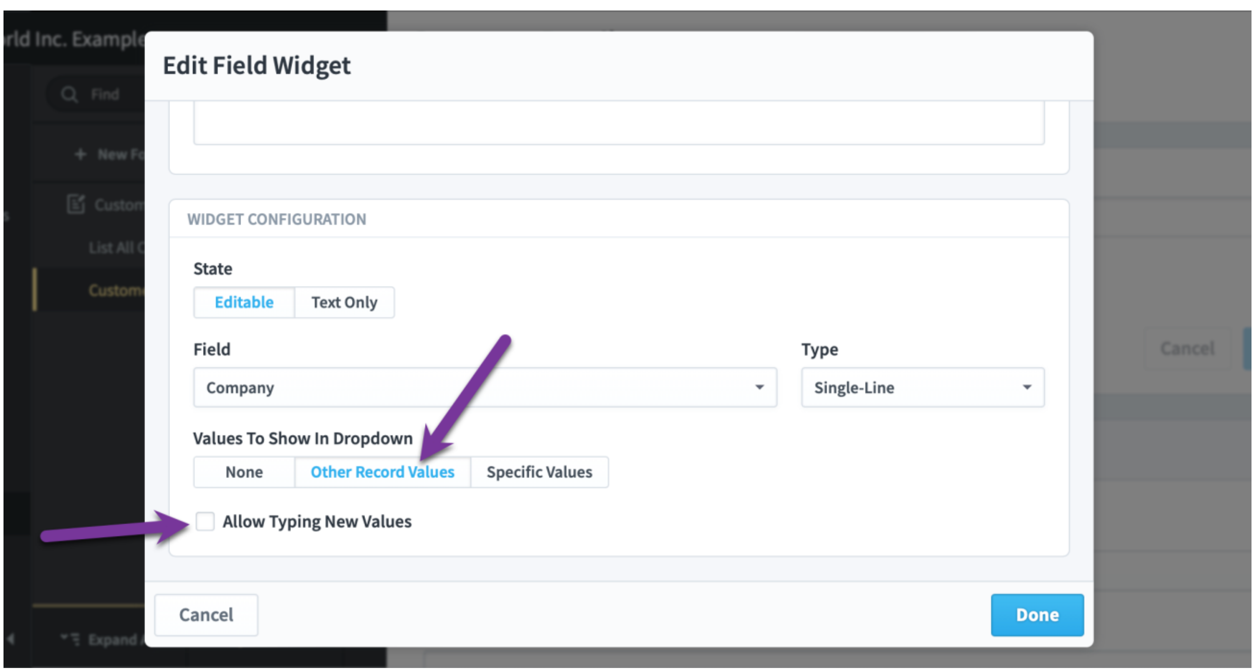
If we choose "Other Record Values", the "Allow Typing New Values" is checked by default.



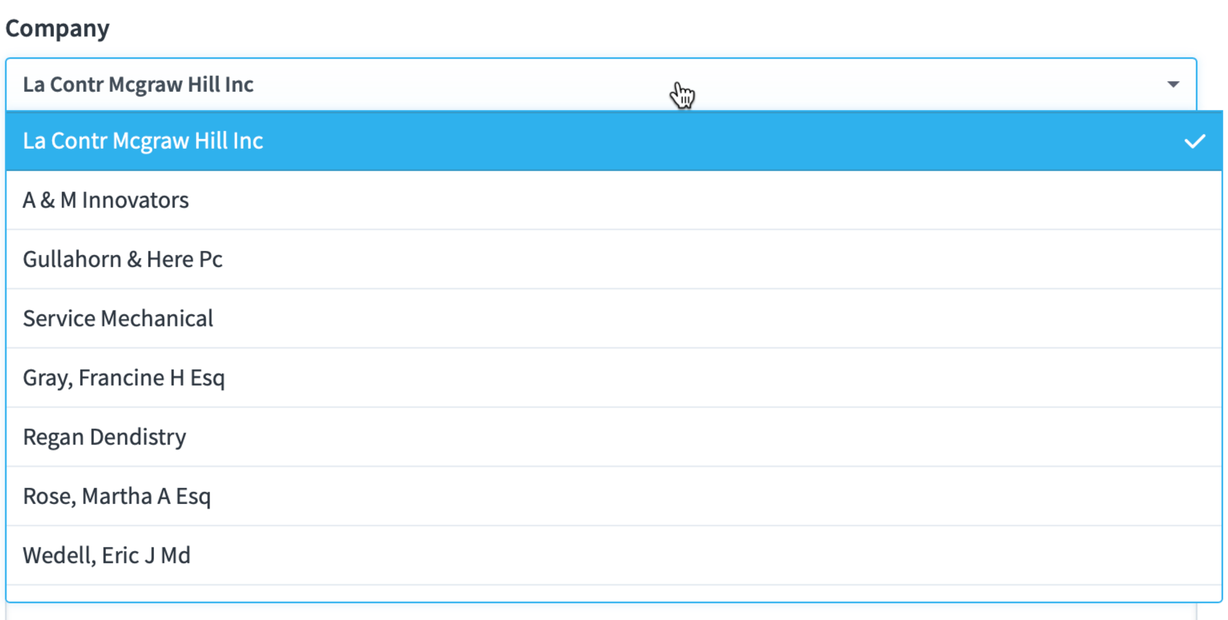
This allows users to type in any value as before, but it also suggests existing values in the dataset that match what they've typed. This can save a lot of time during data entry.



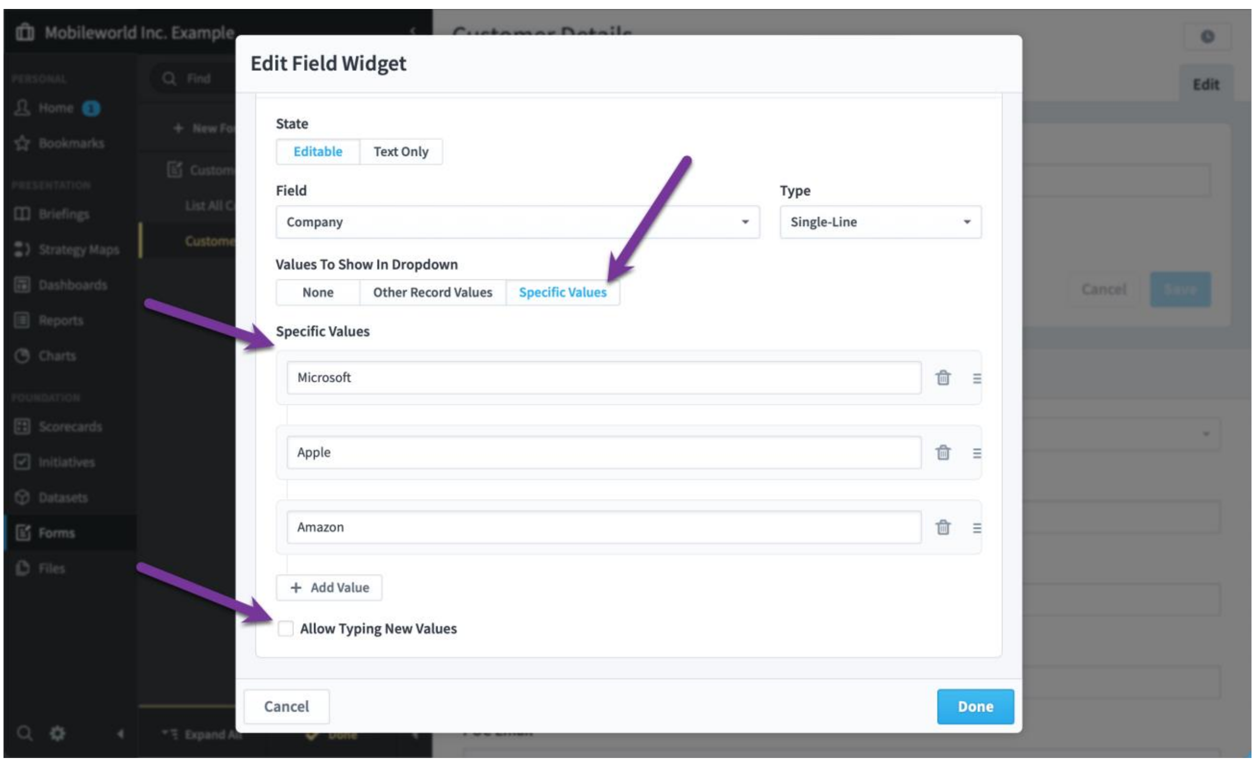
We can also uncheck "Allow Typing New Values" when showing "Other Record Values".



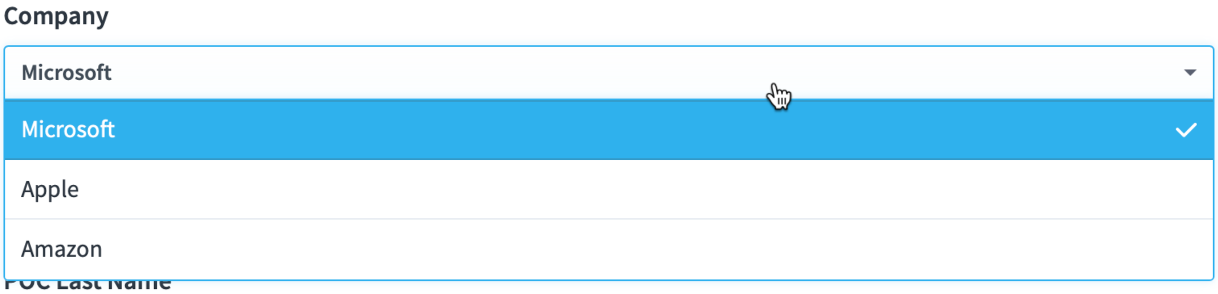
Users will then see a simple dropdown list of options they can choose.



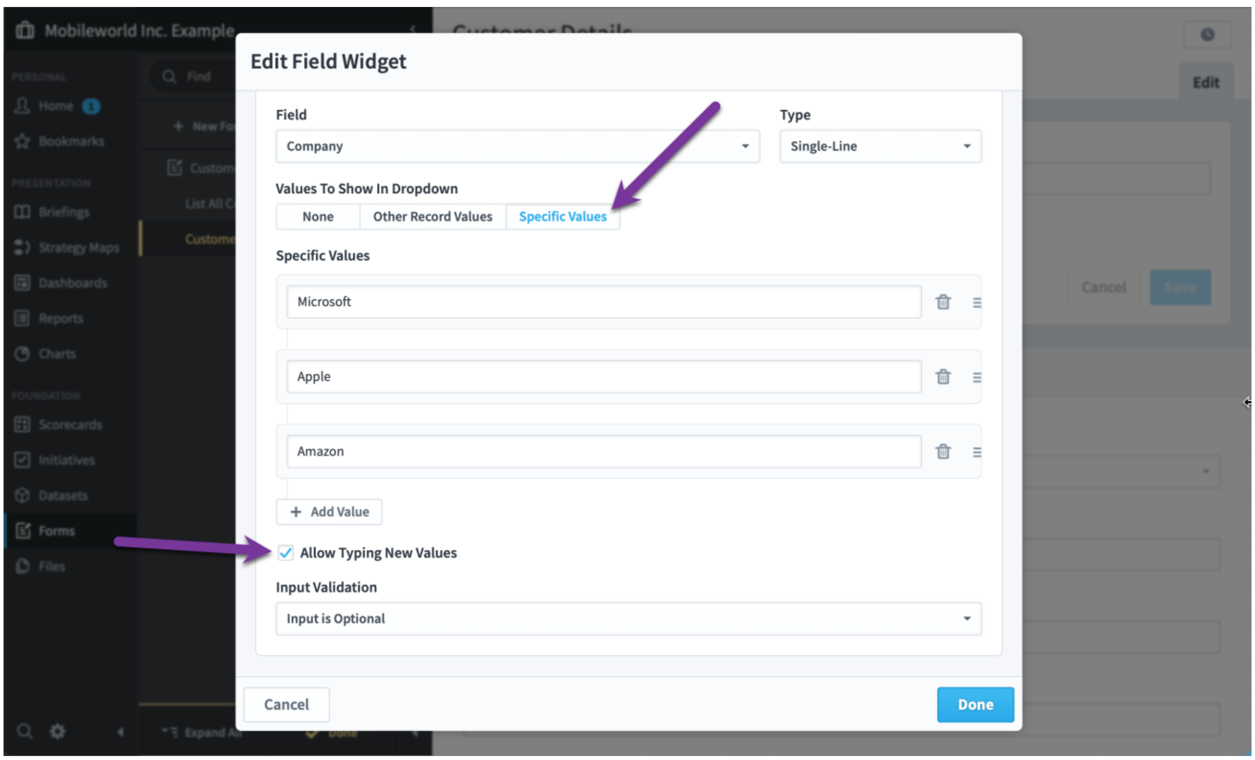
When you choose to show “Specific Values”, you type in the values ahead of time. Here we’ve entered three specific companies that users can choose from, and “Allow Typing New Values” is unchecked.



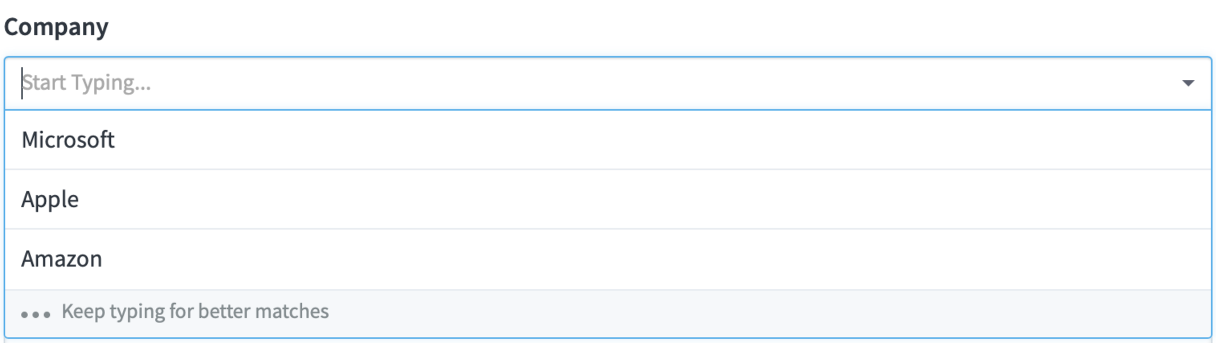
The form will show our three companies in a dropdown list.



You can also check “Allow Typing New Values” when showing “Specific Values”.

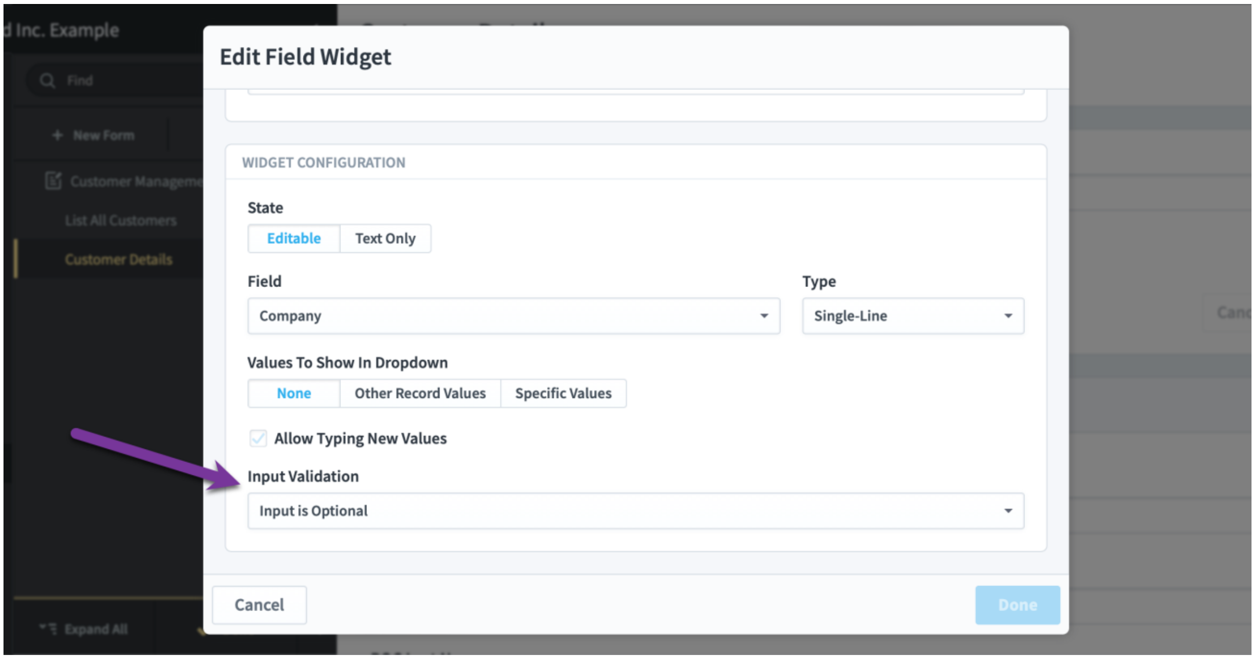


This will suggest our three companies in a dropdown list, but also allow users to type in something else.



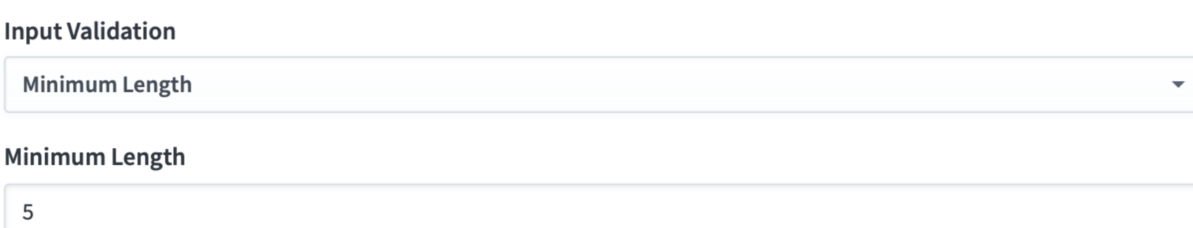
Input Validation

Another important feature of forms single value widgets is input validation. By default, input is optional.

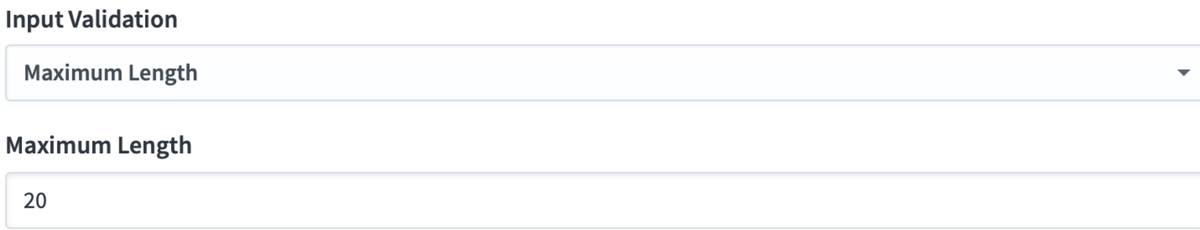


You can also set validation to Input is Required. This means users will have to enter some value for the field.

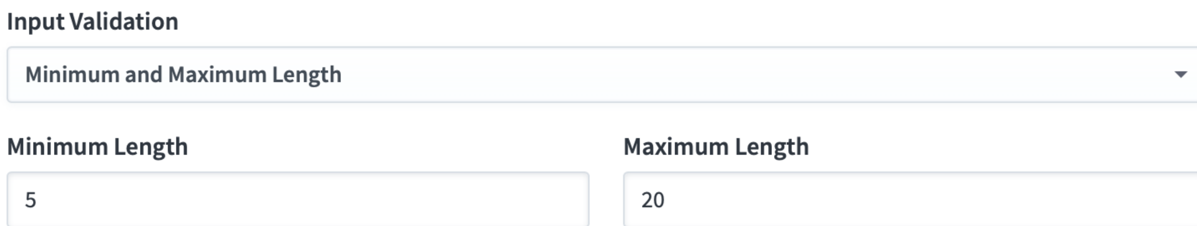
You can set a minimum length of content. Here we're saying users must type at least 5 characters.



You can set a maximum length. Here we're saying users must type 20 or fewer characters.



You can also set both minimum and maximum lengths.

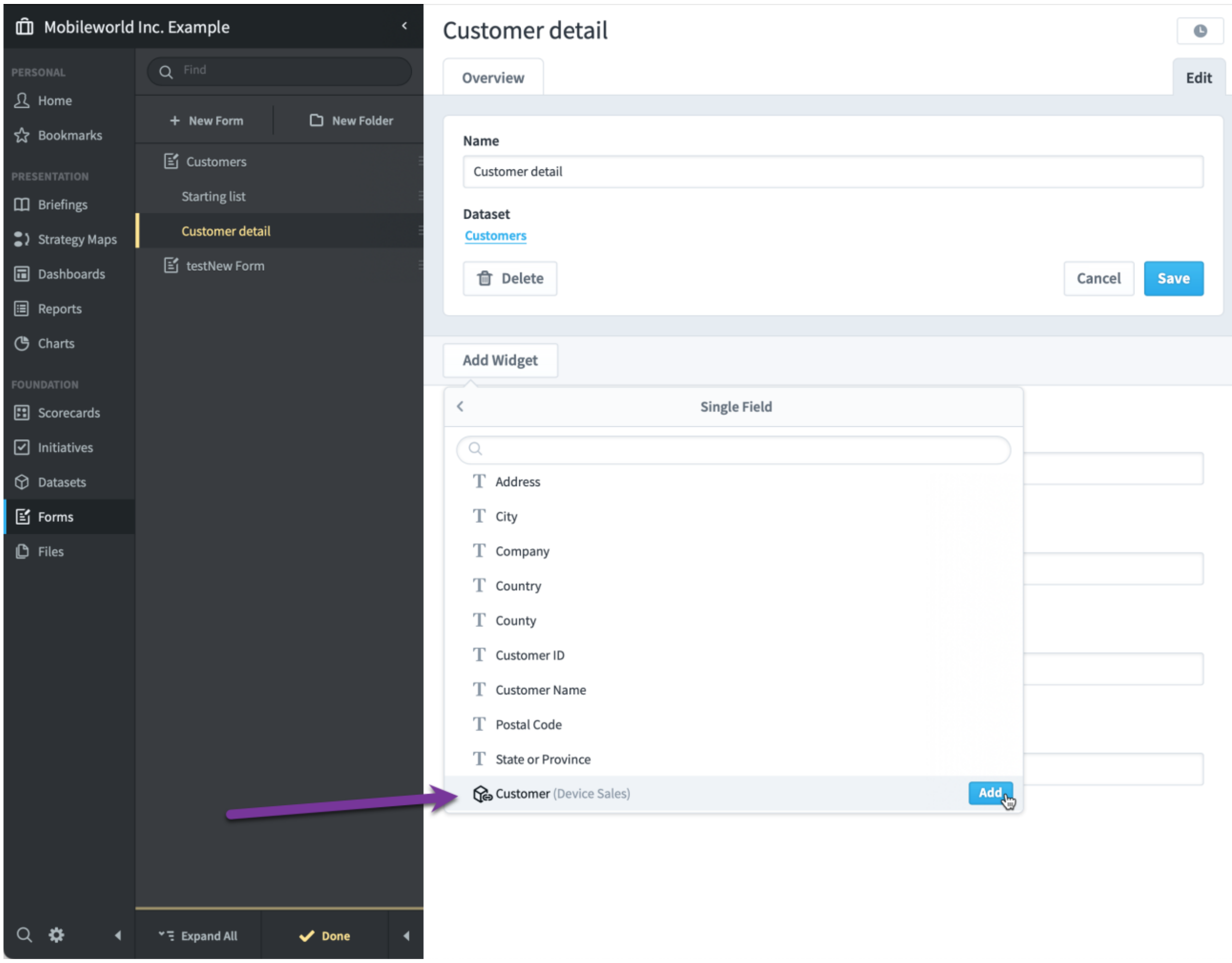


Finally, you can choose custom form validation and enter a regular expression. In this example we're requiring the input to match any email address from the domains yahoo.com, hotmail.com, and gmail.com.

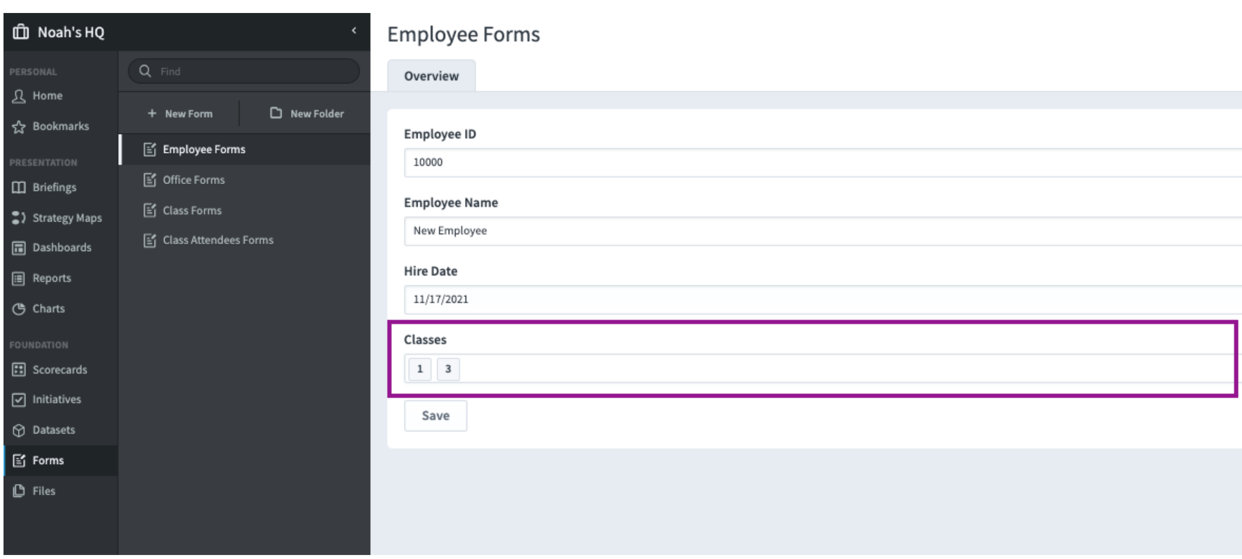
There are resources across the web to help you learn how to make a regular expression to match the text you want. We've found that https://regexr.com/ is an online tool that works well for building the perfect regular expression.

Linked fields

Single value widgets can behave a little differently when you choose a field from a linked dataset. In this example we're creating a single value widget for the "Customer" field in the linked Device Sales dataset.



When your form is on the "many" side of a one-to-many linking relationship, you can choose a single value like any other form fields. When your form is on the "one" side of the one-to-many linking relationship, you can choose multiple values from the linked dataset like in the example below.

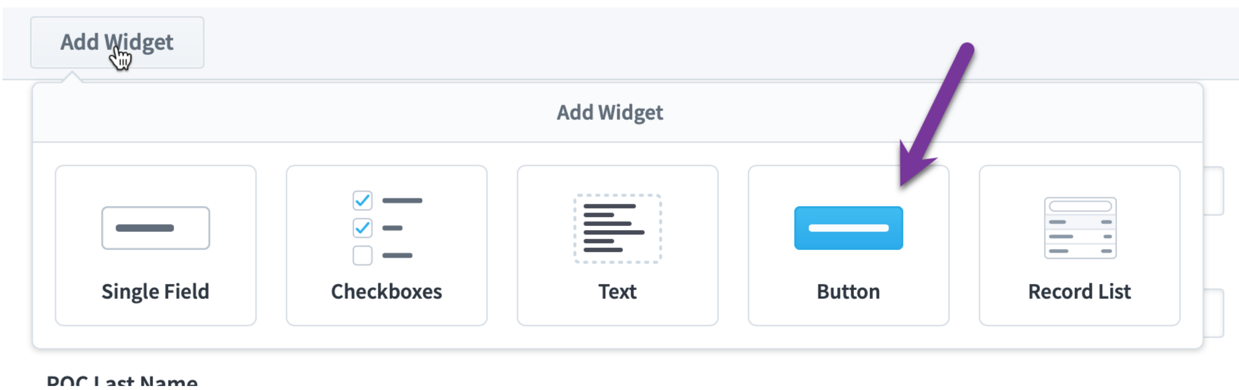


You can even use single value widgets for datasets in many-to-many linking relationships that involve a third dataset for linking the other two.

For example, let's say you have an Employees dataset and a Departments dataset. If you want your employees to be able to be in multiple departments, you'd set up an "Employee Departments" dataset with a field linking to the Employees dataset and a field linking to the Department dataset. You could then choose multiple departments in employee forms, and you could choose multiple employees in department forms.

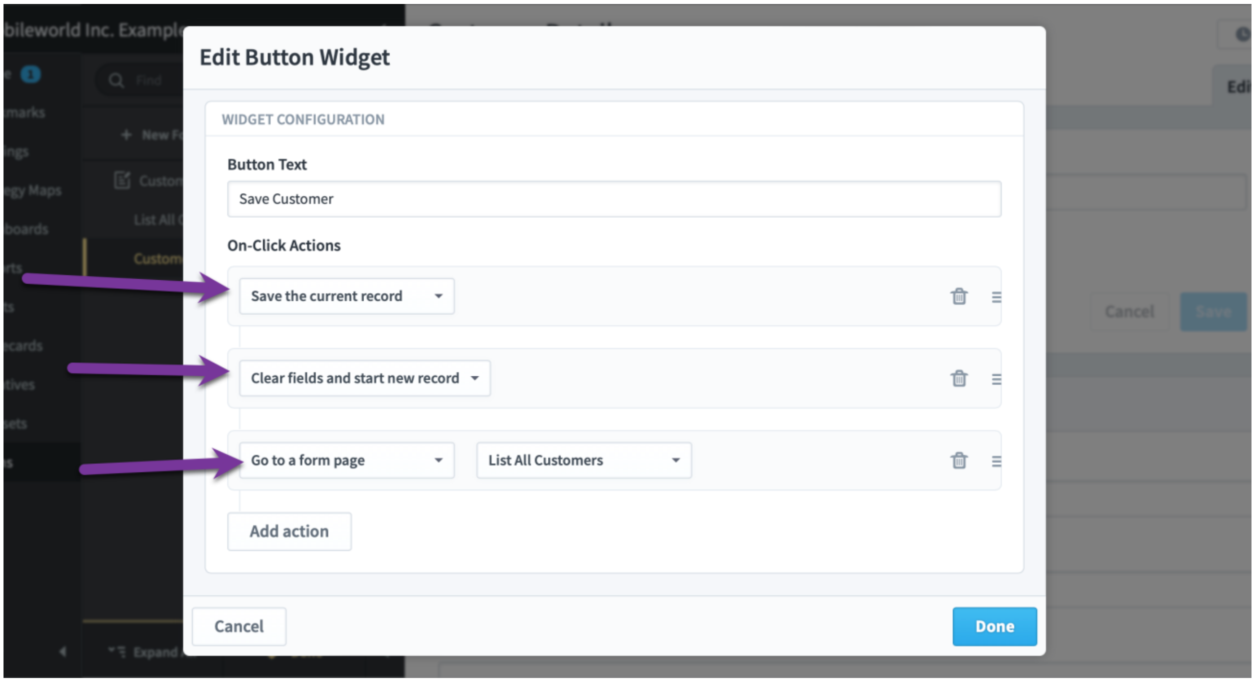
Button widgets

Button form widgets perform an action when you click on them.



They can have one or more of the following actions:

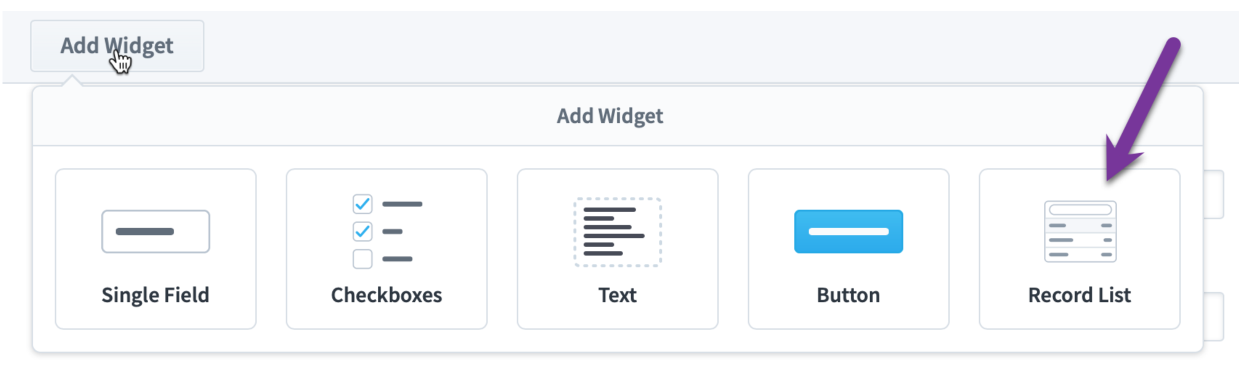
- Save the current record
- Clear fields and start a new record
- Go to a form page



Record List widgets

Overview

Record List form widgets are added from a form page's Add Widget menu.



A record list widget is a scrollable table with one row for every record in the dataset. It's sorted alphabetically by the first column.

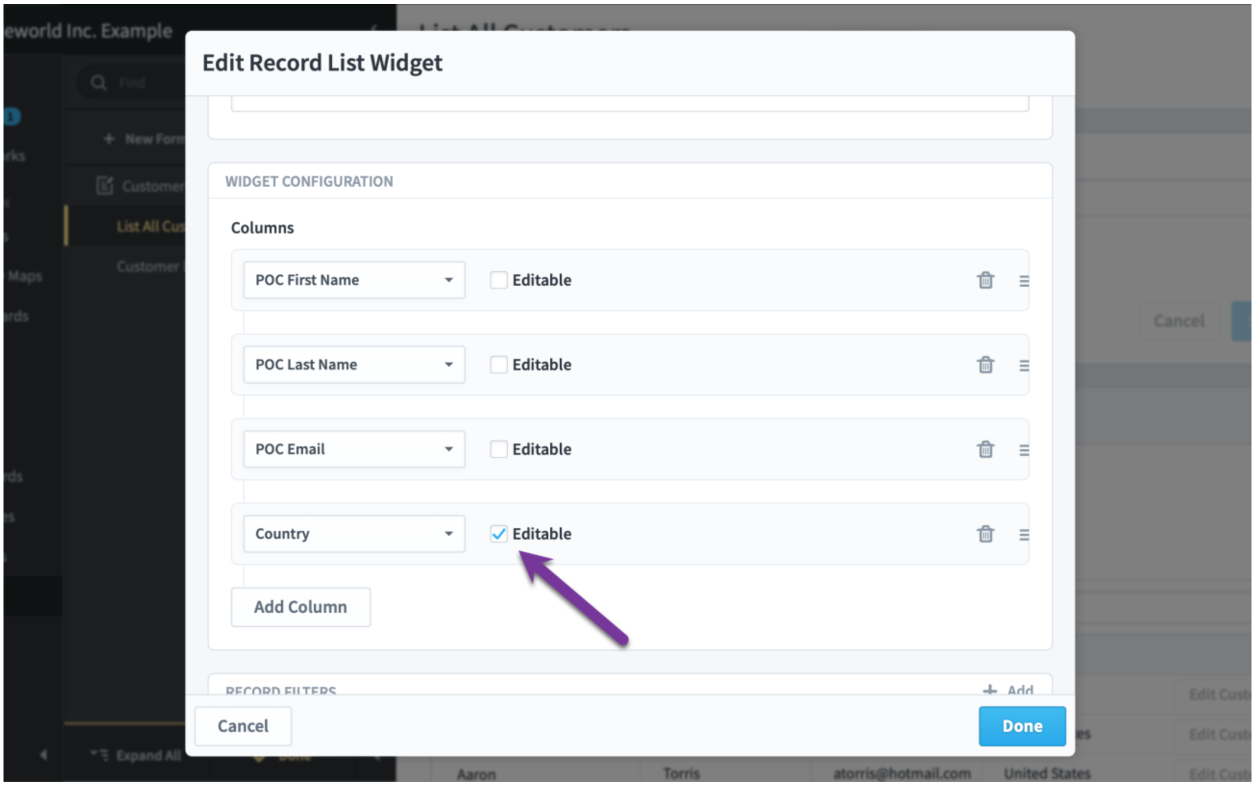
Find			
POC FIRST NAME	POC LAST NAME	POC EMAIL	COUNTRY
Aaron	Kloska	aaron_kloska@kloska.net.au	Australia
Aaron	Dimitri	aaron@dimitri.com	United States
Aaron	Torris	atorris@hotmail.com	United States
Abbey	Lortz	alortz@aol.com	United States
Abbey	Sovey	abbey@hotmail.com	United Kingdom
Abbie	Obery	aobery@yahoo.com	United States
Abbie	Melito	amelito@hotmail.com	Canada
Abbie	Pitkin	abbie_pitkin@pitkin.com	United States
Abbie	Marcinko	amarcinko@marcinko.com.au	Australia
Abbie	Schuetz	aschuetz@aol.com	Canada
Abby	Seman	abby_seman@seman.co.uk	United Kingdom

You can search by typing a phrase in the Find field on top. Here we're searching for "sherm" and the record list widget is showing the 5 records that include that phrase in any of the fields that are showing.

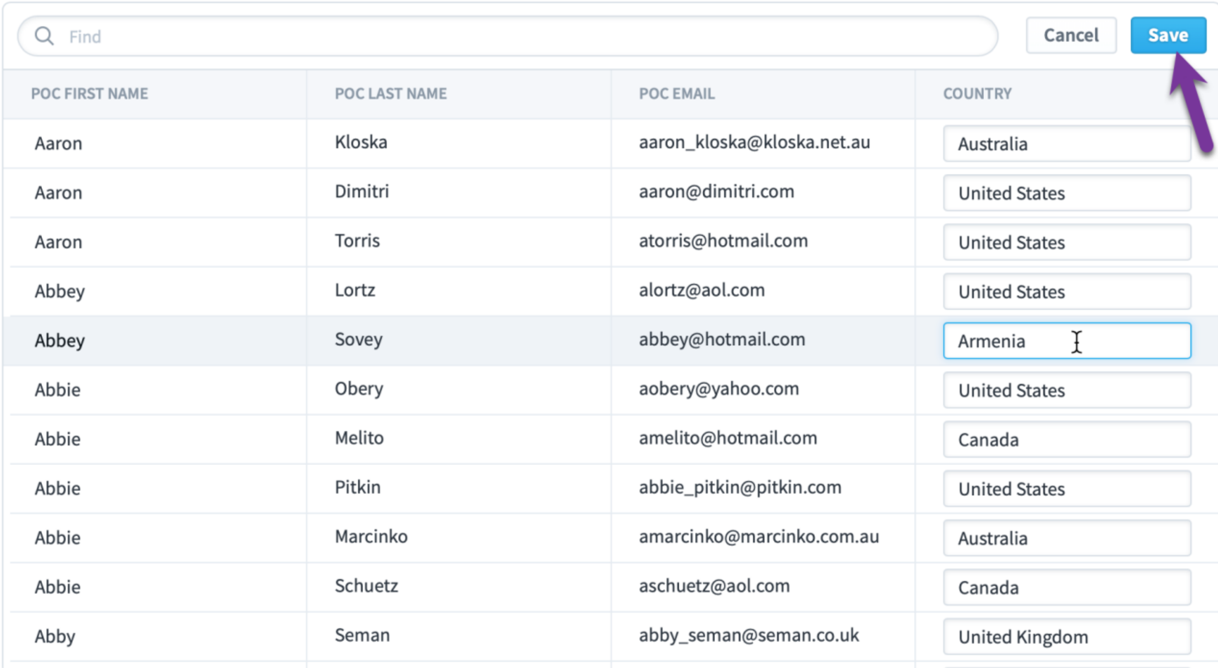
sherm			
POC FIRST NAME	POC LAST NAME	POC EMAIL	COUNTRY
Irmgard	Ausherman	irmgard@aol.com	Canada
Sherman	Sedotal	ssedotal@cox.net	United States
Sherman	Mahmud	sherman@mahmud.com.au	Australia
Sherman	Tajudeen	sherman_tajudeen@tajudeen.c...	Canada
Sherman	Yaekel	sherman@aol.com	United States

Choosing columns

You can choose which fields to show columns for in the record list widget's Edit dialog. Here we've also marked the Country column as editable.

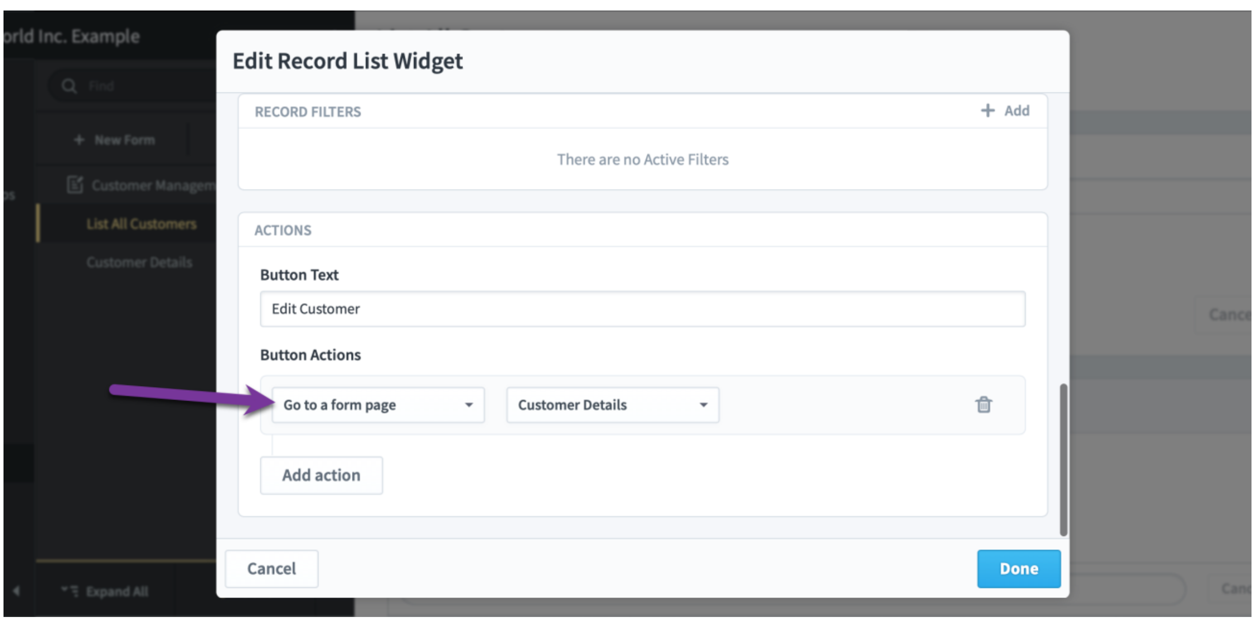


This is what that record list widget looks like when using the form. In this example we've changed Abbey Sovey's country to Armenia, and we can either Save or Cancel the change. By making one or more columns Editable, you can make changes to many records quickly.

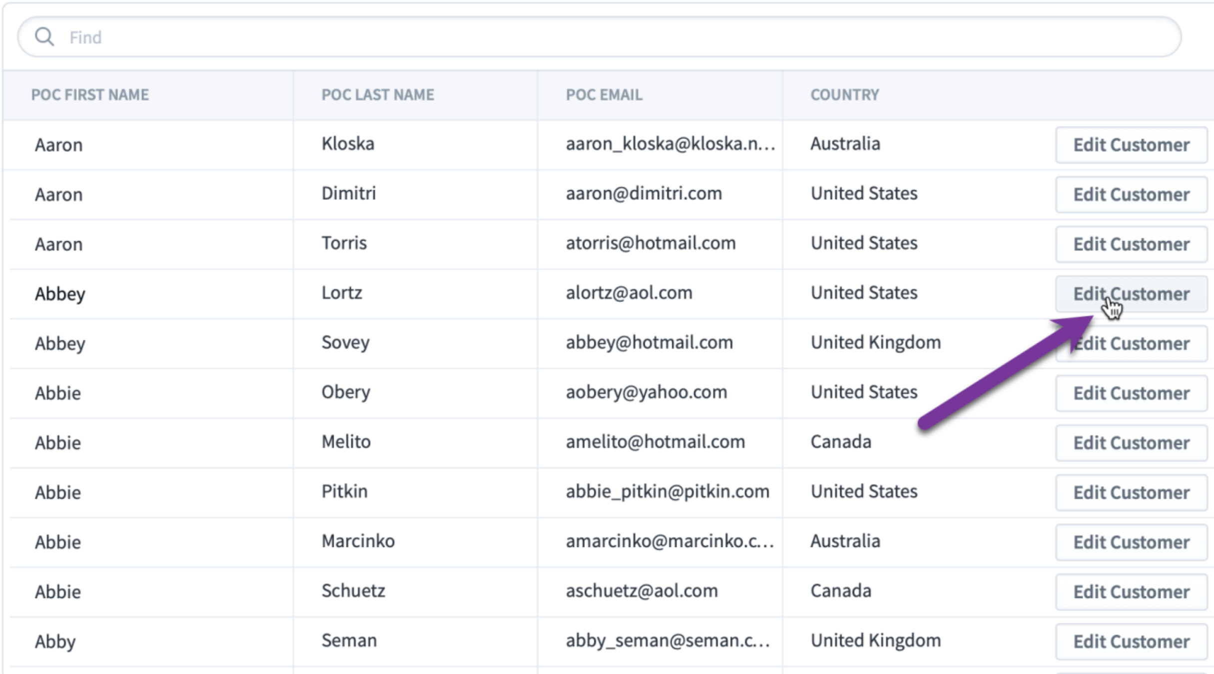


Action buttons

You can also choose to have action buttons on rows. In this example we've set the action button text to Edit Customer, and we've set the action to go to the Customer Details page.



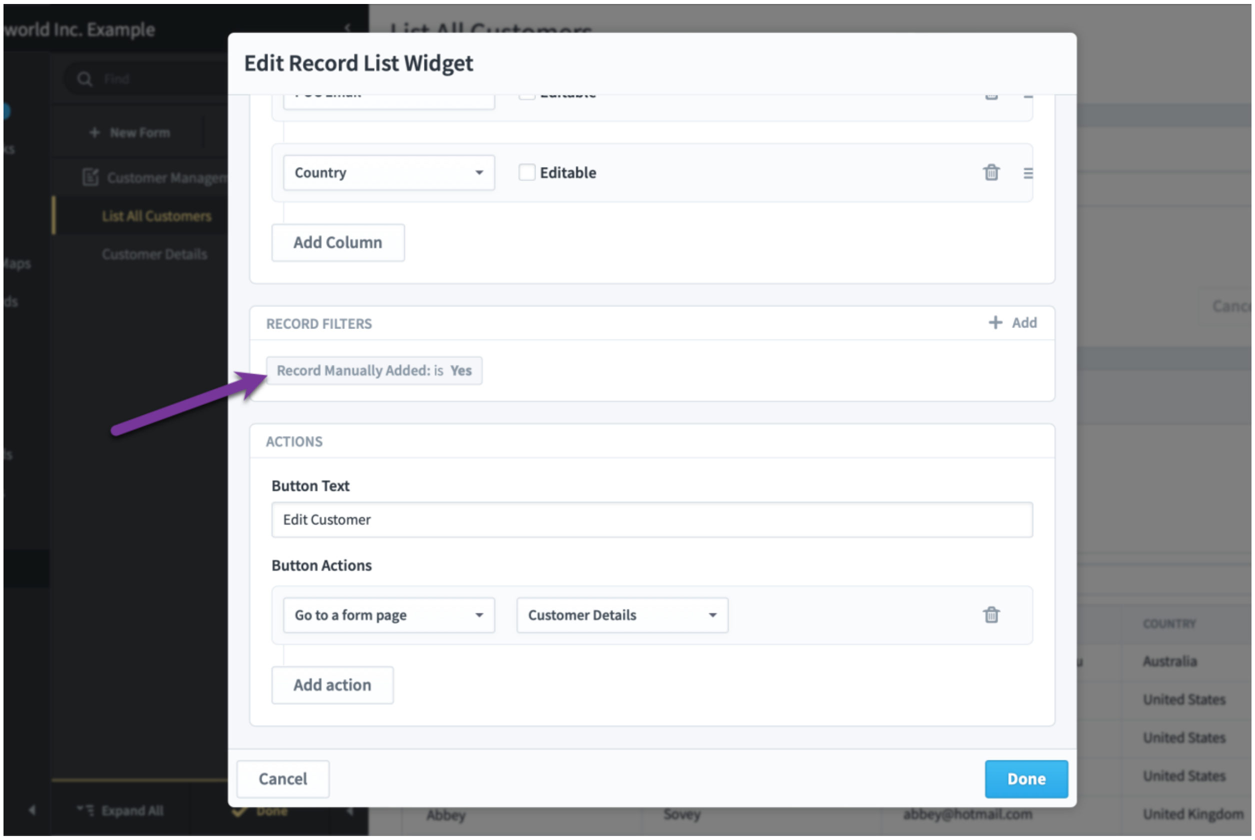
Now when we click an Edit Customer button, the form will go to the Customer Details page for that record. It's very common to use the record list widget like this to choose which record you want to view or edit.



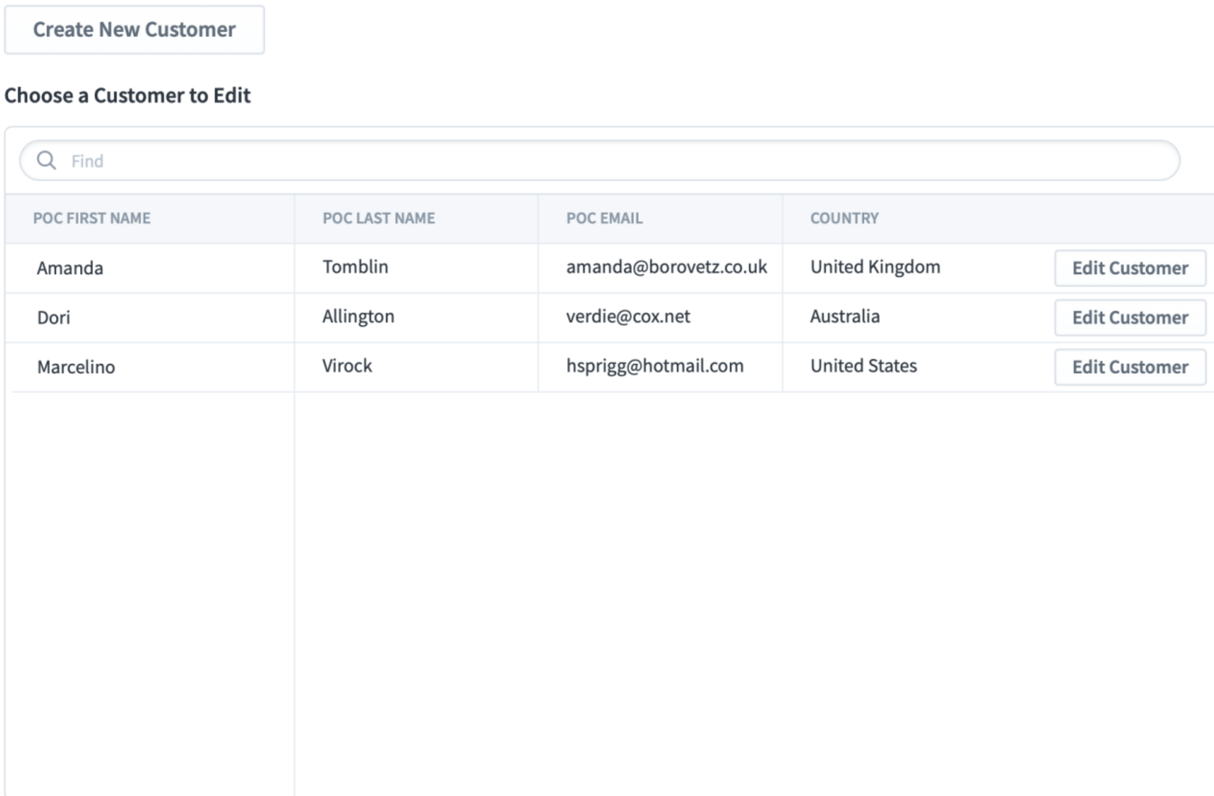
POC FIRST NAME	POC LAST NAME	POC EMAIL	COUNTRY	
Aaron	Kloska	aaron_kloska@kloska.n...	Australia	Edit Customer
Aaron	Dimitri	aaron@dimitri.com	United States	Edit Customer
Aaron	Torris	atorris@hotmail.com	United States	Edit Customer
Abbey	Lortz	alortz@aol.com	United States	Edit Customer
Abbey	Sovey	abbey@hotmail.com	United Kingdom	Edit Customer
Abbie	Obery	aobery@yahoo.com	United States	Edit Customer
Abbie	Melito	amelito@hotmail.com	Canada	Edit Customer
Abbie	Pitkin	abbie_pitkin@pitkin.com	United States	Edit Customer
Abbie	Marcinko	amarcinko@marcinko.c...	Australia	Edit Customer
Abbie	Schuetz	aschuetz@aol.com	Canada	Edit Customer
Abby	Seman	abby_seman@seman.c...	United Kingdom	Edit Customer

Record filters

You can change which records show in the record list widget by adding a record filter in the widget's Edit dialog. Here we're choosing to only show records that were manually added, but you can apply any of the dataset filters that are used throughout Spider Impact.

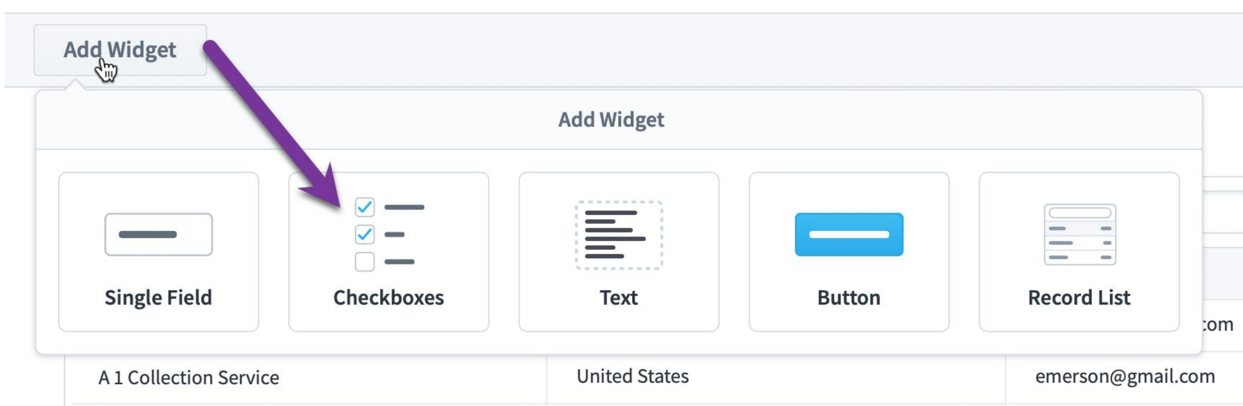


When we use the form we now only see the records that were manually added. This can be very helpful when using a form to add and manage only a dataset's supplementary records.

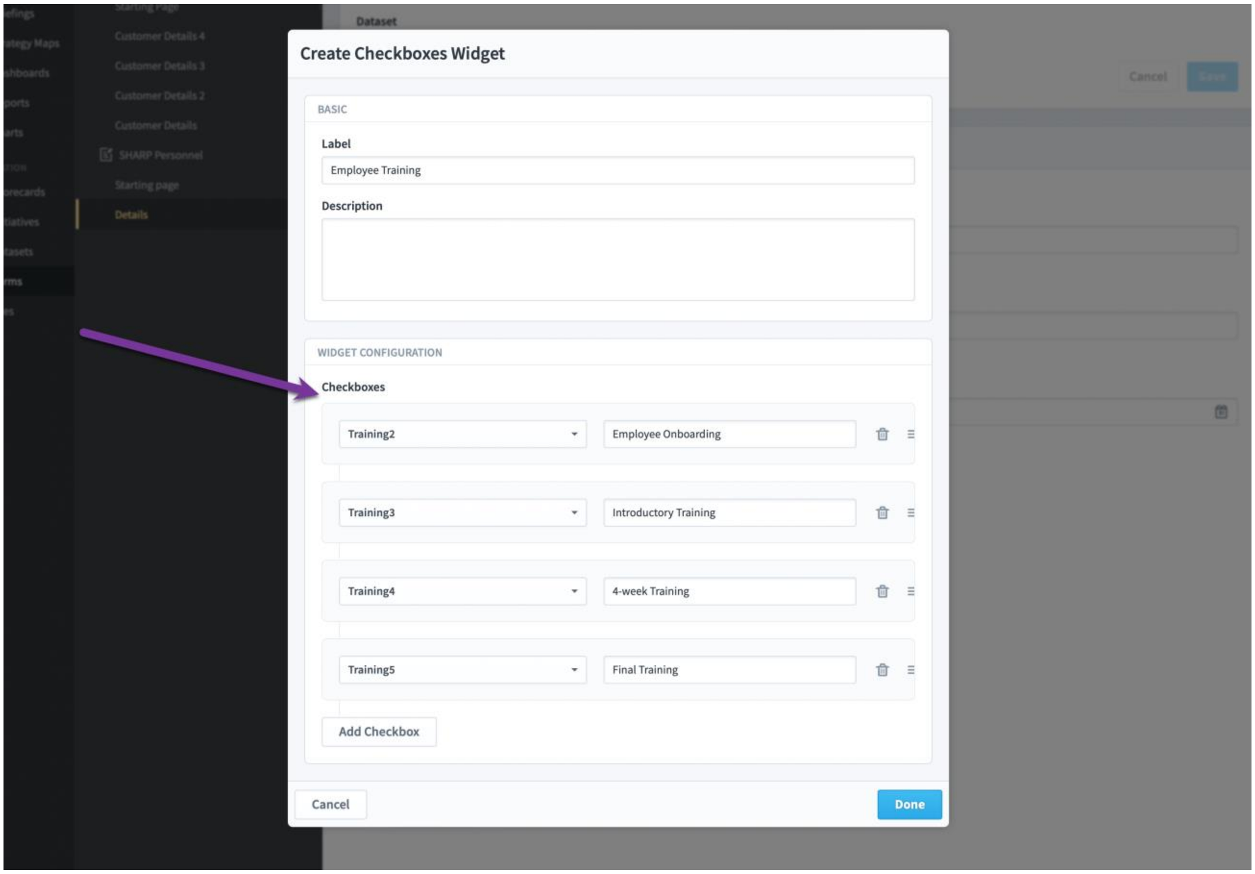


Checkboxes widgets

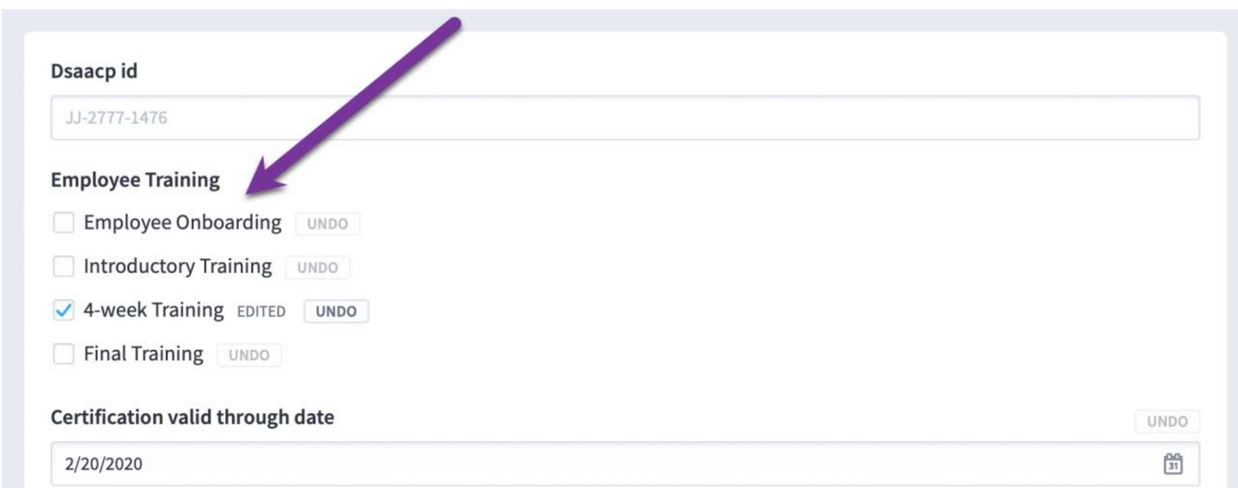
The Checkboxes form widget allows you to update the values for multiple yes/no fields at once.



Here we're choosing four yes/no fields, and giving them labels.

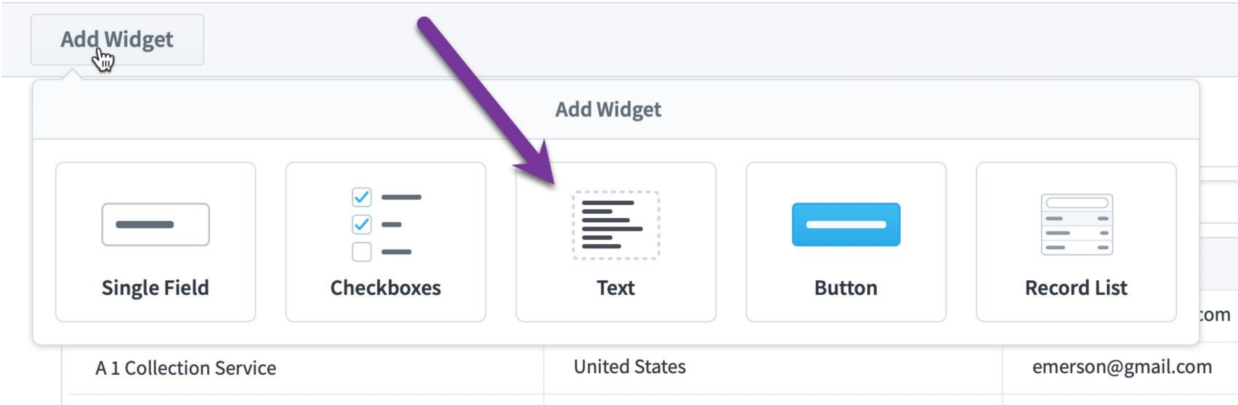


When someone uses the form, they just check the boxes to update the fields.

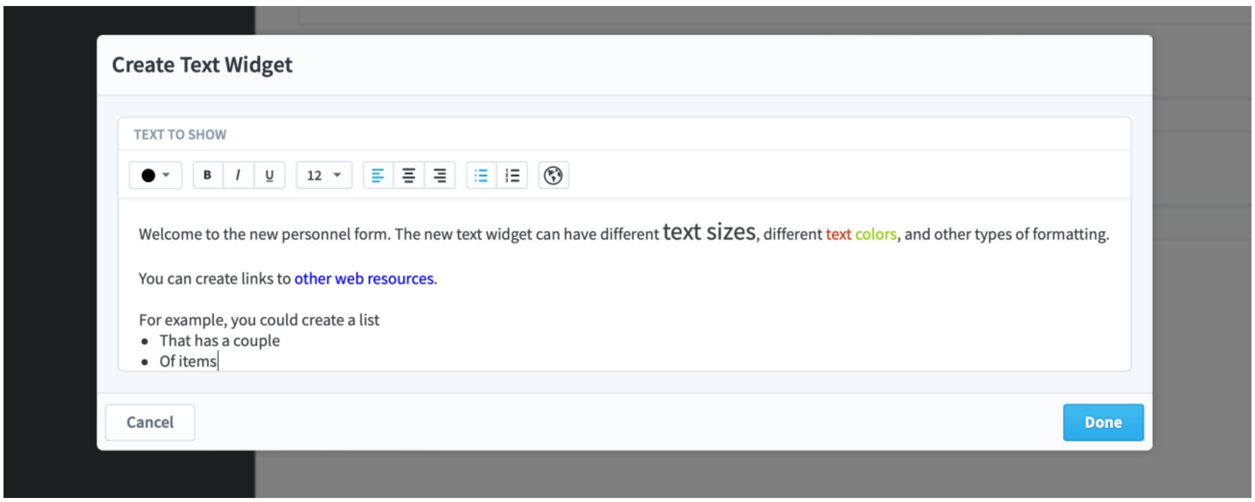


Text widgets

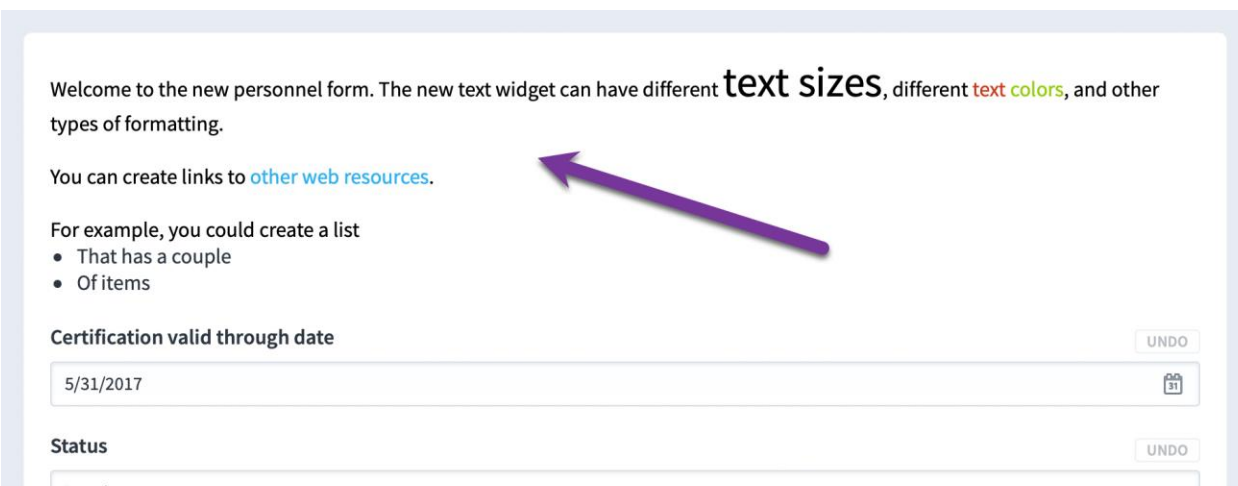
Text form widgets allow you to include formatted text on your forms.



This matches other rich text editing in Spider Impact, and can be used for instructions, or even links to additional documentation.



This is the appearance of the example text at the top of the form when it's in use.

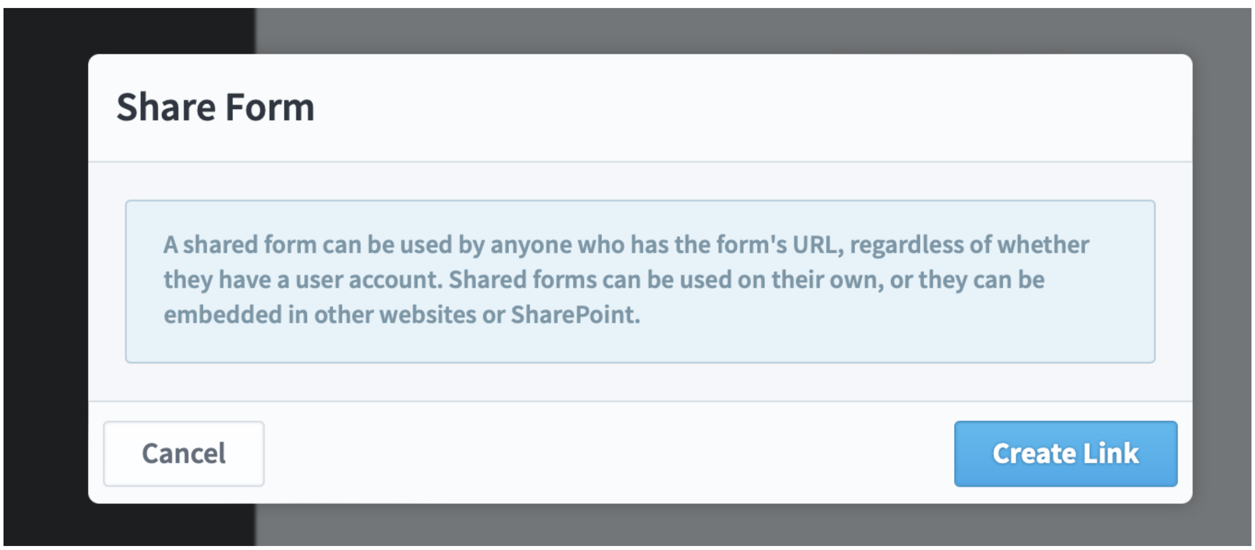


Sharing forms

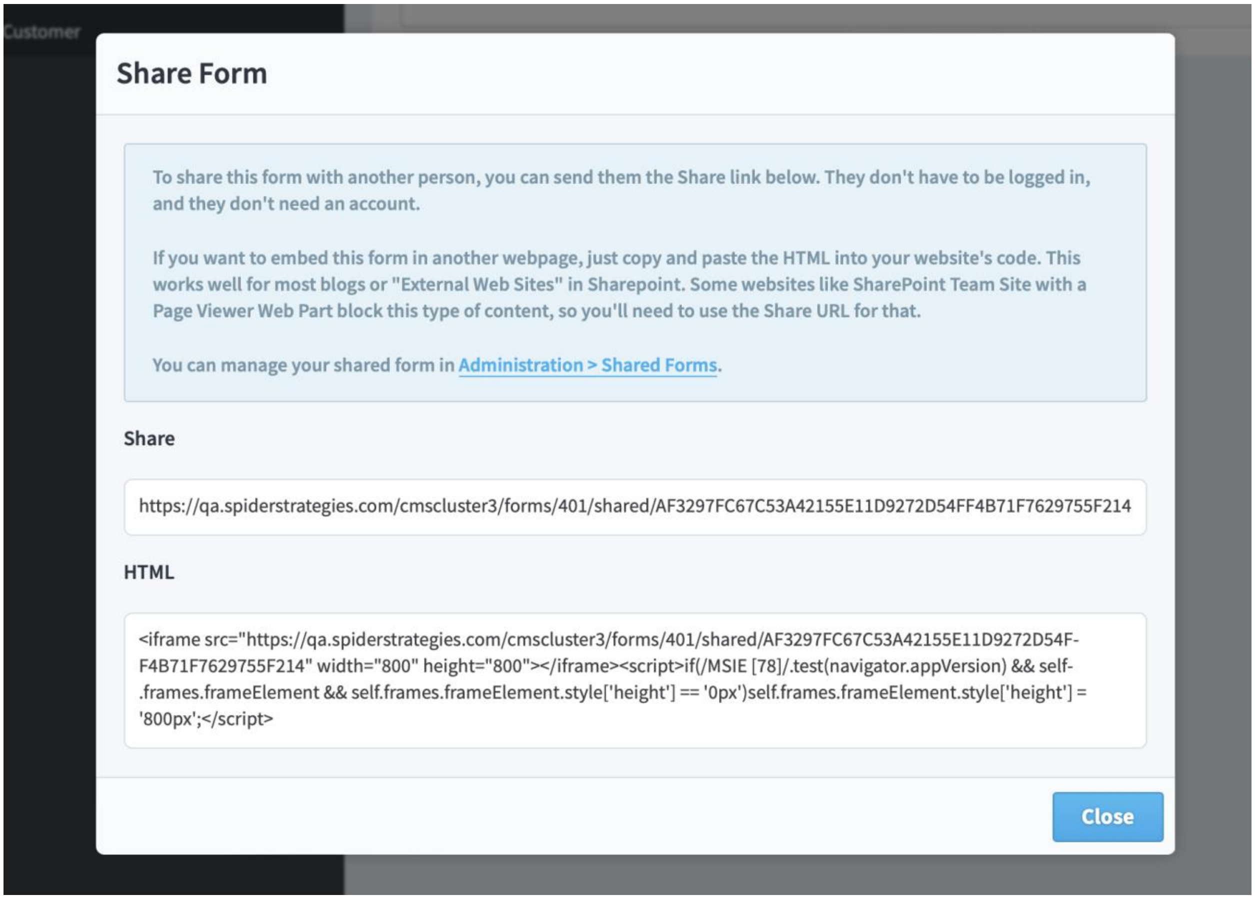
You can choose to share forms with people outside of Spider Impact. This can be useful for surveys, or for sharing mini-apps like inventory management or training class attendance.

To share a form, click the form's Send To menu and choose "Shared Form".

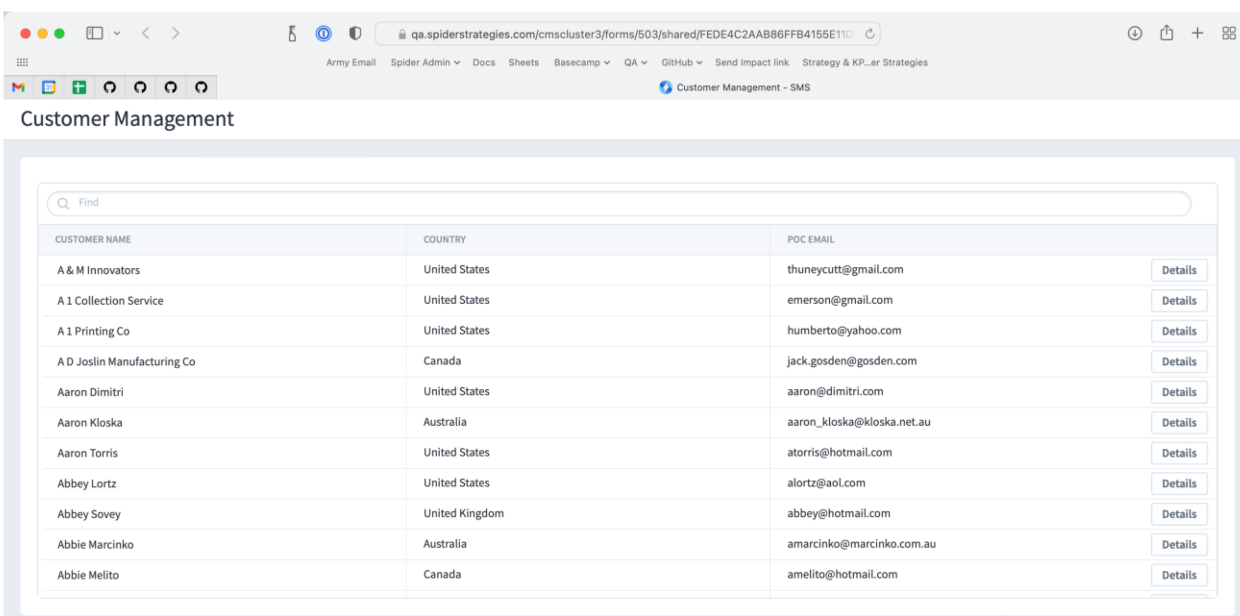
This opens a dialog that explains exactly what will happen when you share a form. It allows anyone with the URL to enter and view data with the permissions of the person sharing the form, so it's important to build these shared forms with that in mind.



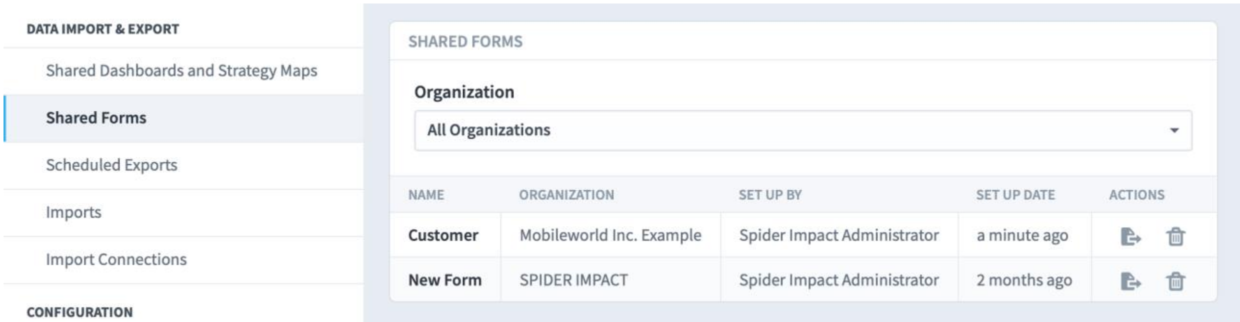
Once you click Create Link, you can copy and paste either a shareable URL or code that can be embedded in a website.



Users that you share this URL with will be able to see a form like this that doesn't require authentication.



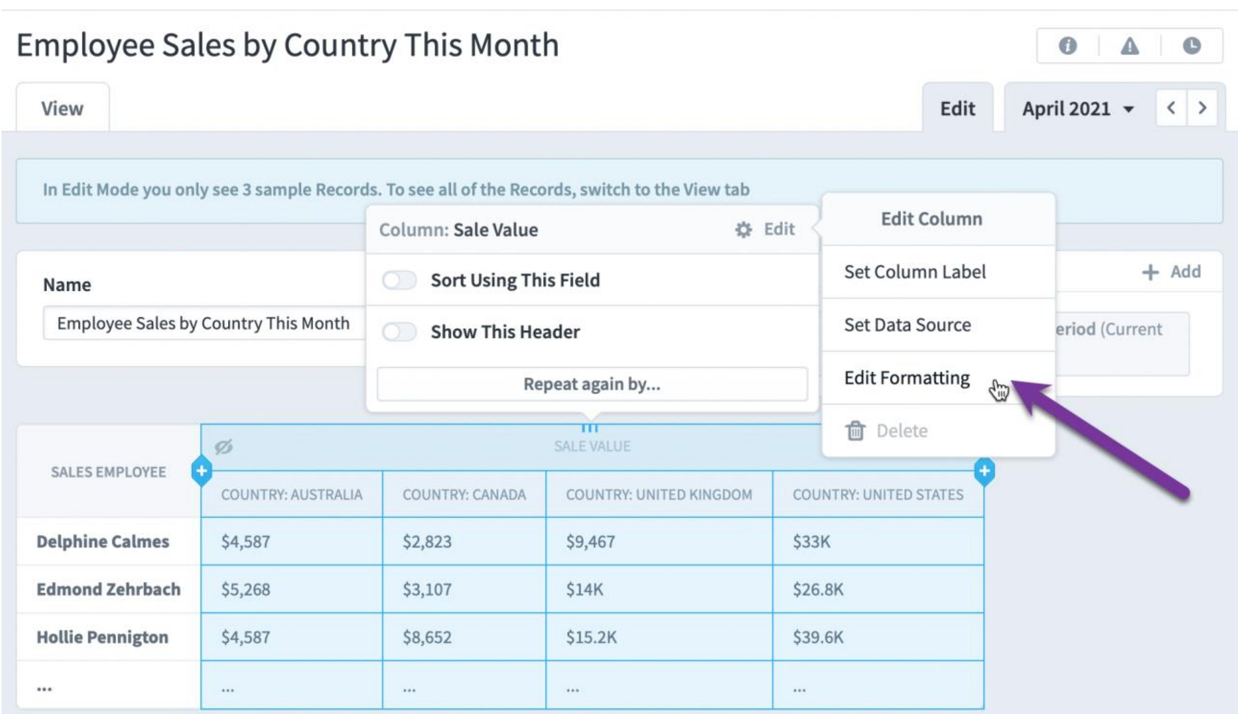
Administrators can visit the Shared Forms page in the Administration section to see all of the shared forms, and they have the ability to stop sharing them.



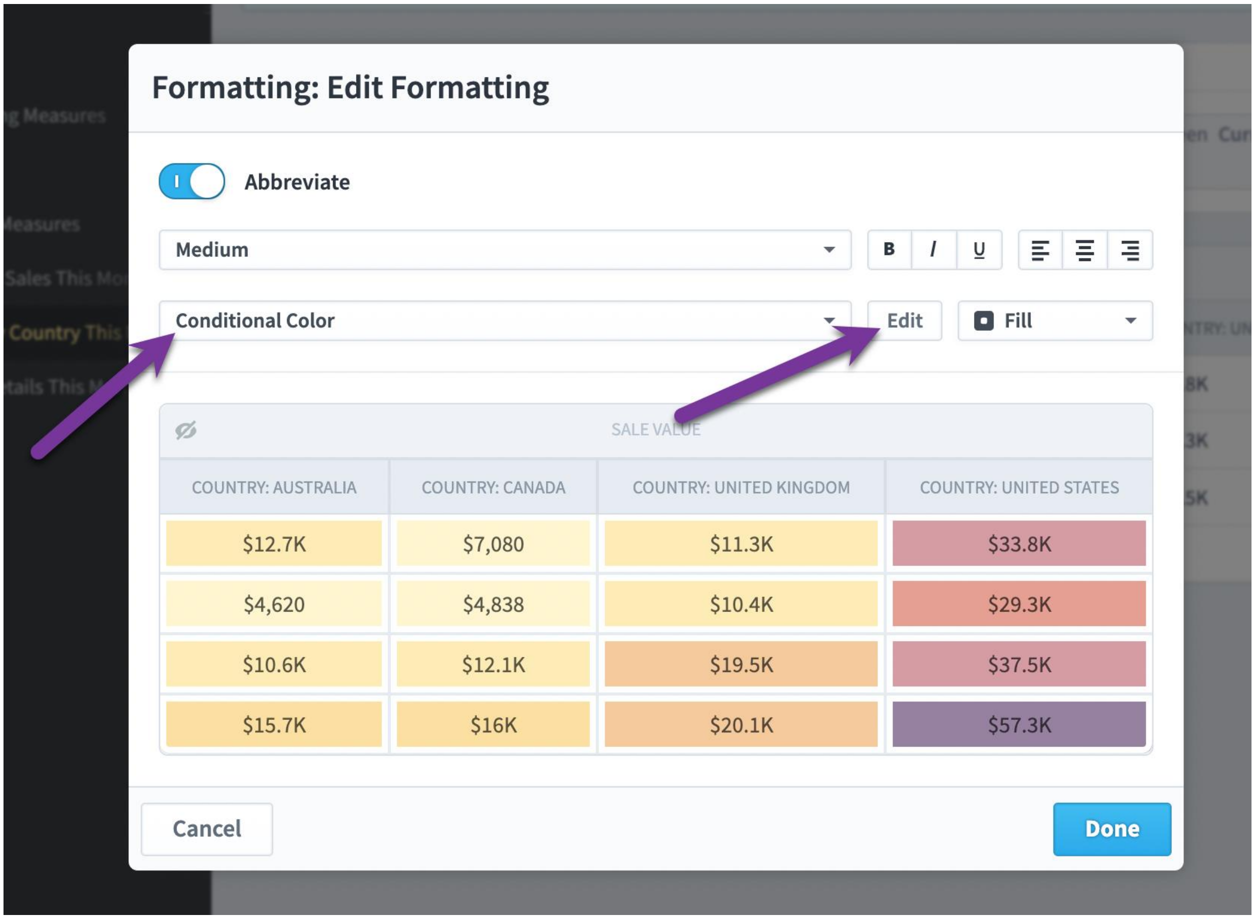
Reports

Conditional report coloring

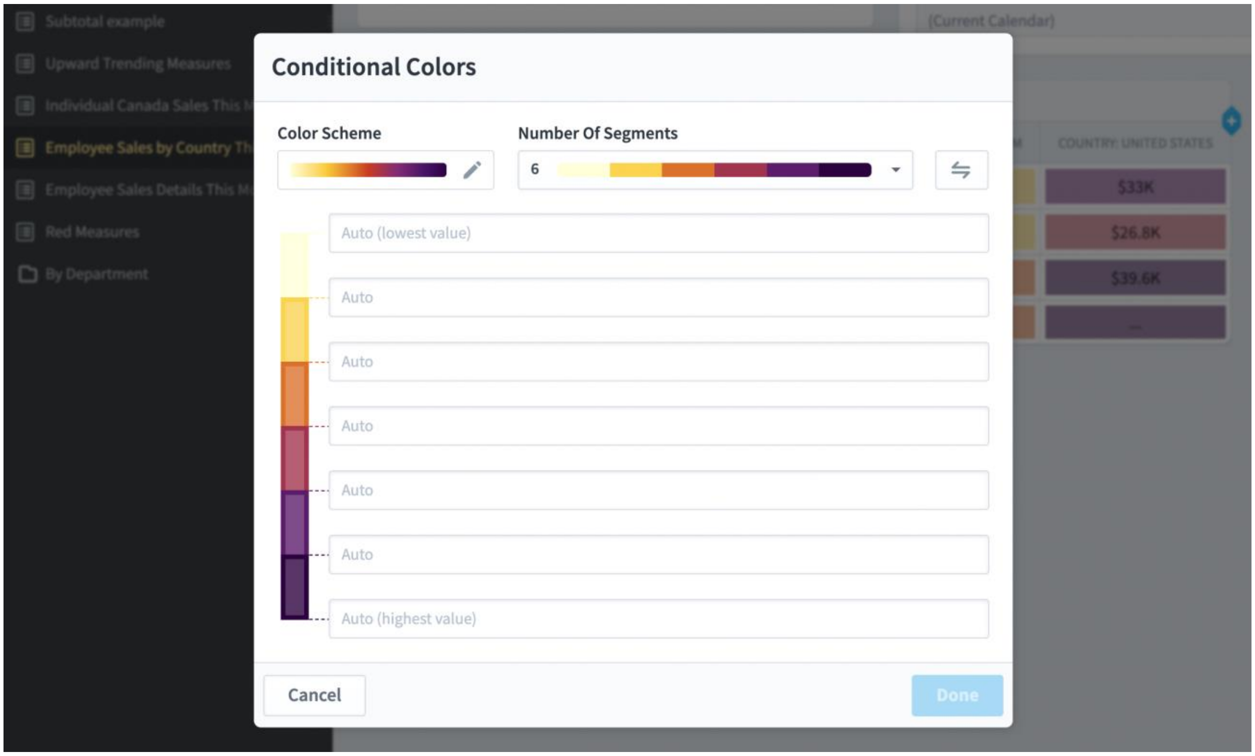
You can now color the cells in dataset report columns based on their values. To do this, select the column and choose “Edit Formatting”.



One of the color options you can choose now is Conditional Color. This shows a different color based on each cell's value. You can edit the conditional coloring by clicking Edit.



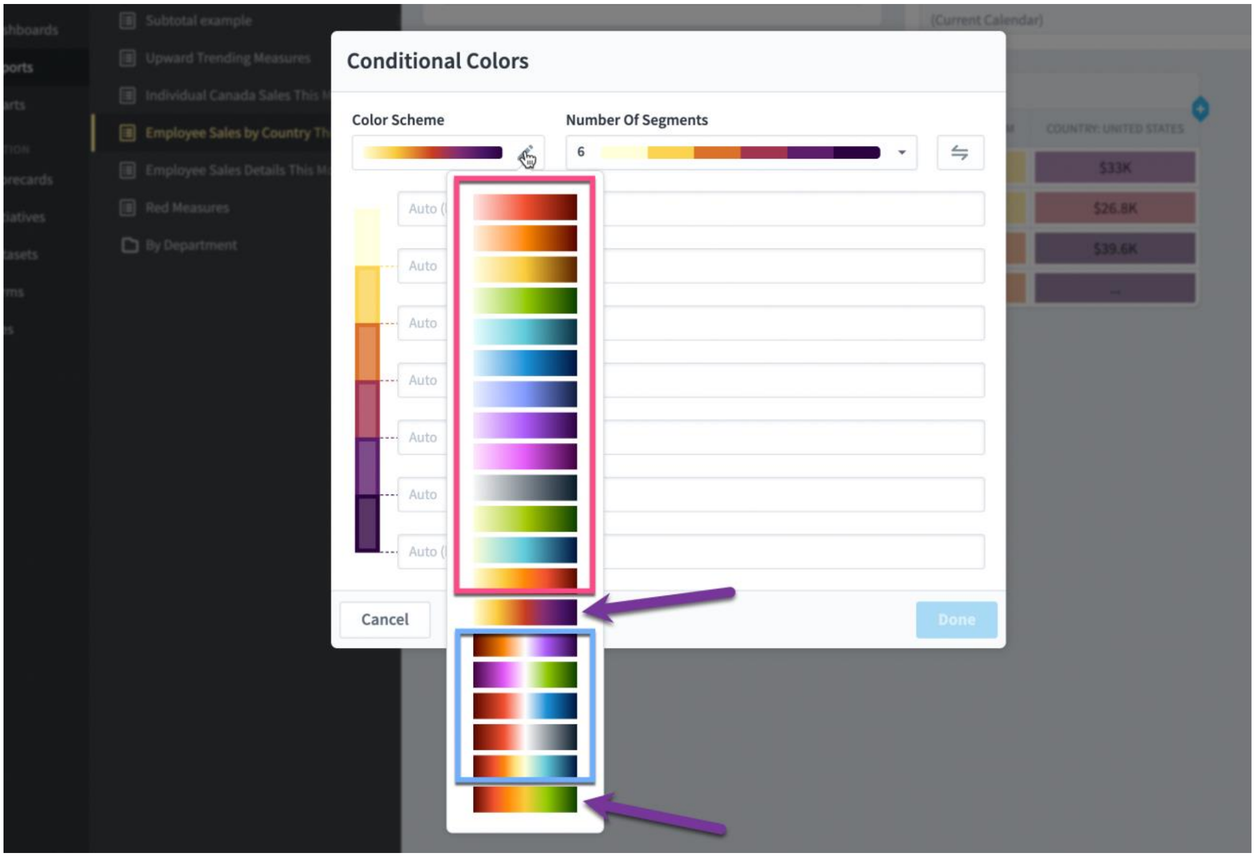
By default there are 6 color segments, and all of the color thresholds are set to Auto.



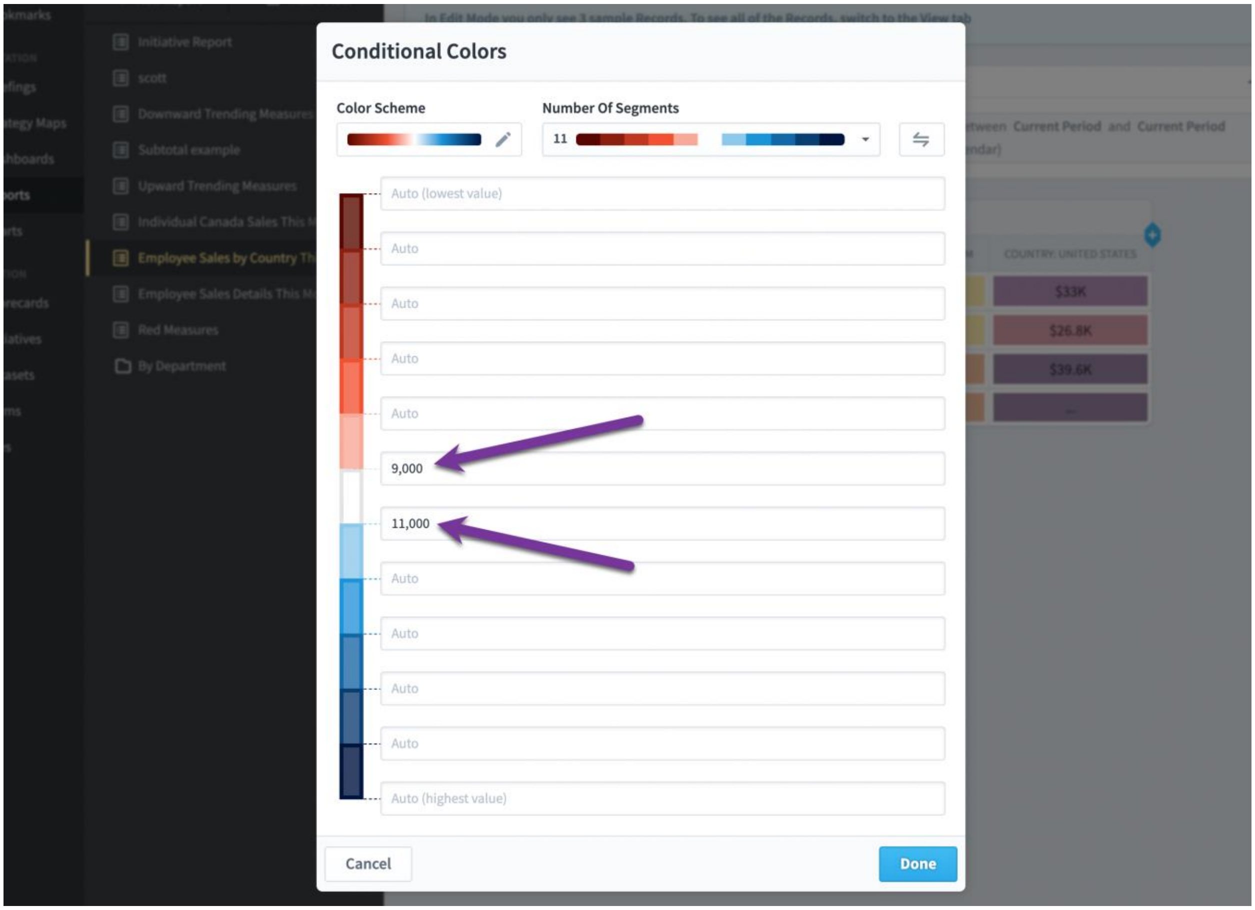
This means the report finds the highest value in the column and lowest value in the column, and then breaks up that range into 6 evenly sized segments. The result it a report that looks like this:

SALES EMPLOYEE	COUNTRY: AUSTRALIA	COUNTRY: CANADA	COUNTRY: UNITED KINGDOM	COUNTRY: UNITED STATES
Delphine Calmes	$4,587	$2,823	$9,467	$33K
Edmond Zehrbach	$5,268	$3,107	$14K	$26.8K
Hollie Pennigton	$4,587	$8,652	$15.2K	$39.6K
Issac Bernhardt	$7,346	$14.5K	$17.3K	$37K
Kym Lavender		$11.4K	$20.9K	
Micheline Turkasz	$10.1K	$9,149	$13.2K	$33.4K
Odell Sheler	$10.4K	$11.7K	$18.3K	$39.5K
Russell Corrick	$25.9K	$18.1K	$34.2K	$28.6K

You can choose from a wide variety of color schemes. The options in the pink box are all smooth gradients that start in a light version of a color and end in a dark version of that color. The options in the blue box have a light color in the middle and have two different dark colors for high and low values. The two purple arrow options are gradients that hit different colors. One is a heat map gradient, and the other is a red/yellow/green scoring gradient.



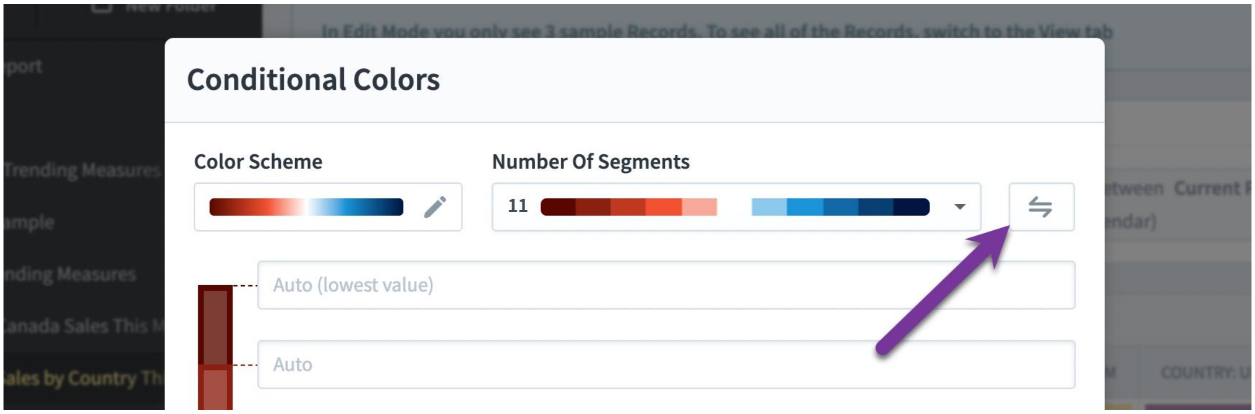
You can also override any of the thresholds to be a specific value. This is helpful when you know acceptable ranges ahead of time. In this example we've changed the color scheme and we've increased the number of segments. We've also added thresholds so that anything with a value between $9k and $11k will be white. Anything above that will be increasingly darker shades of blue. Anything below will be increasingly darker shades of red.



The report now looks like this.

SALES EMPLOYEE	COUNTRY: AUSTRALIA	COUNTRY: CANADA	COUNTRY: UNITED KINGDOM	COUNTRY: UNITED STATES
Delphine Calmes	$4,587	$2,823	$9,467	$33K
Edmond Zehrbach	$5,268	$3,107	$14K	$26.8K
Hollie Pennigton	$4,587	$8,652	$15.2K	$39.6K
Issac Bernhardt	$7,346	$14.5K	$17.3K	$37K
Kym Lavender		$11.4K	$20.9K	
Micheline Turkasz	$10.1K	$9,149	$13.2K	$33.4K
Odell Sheler	$10.4K	$11.7K	$18.3K	$39.5K
Russell Corrick	$25.9K	$18.1K	$34.2K	$28.6K

There's a "Flip" button to flip the color order. In this example, higher values are now red and lower values are now blue.

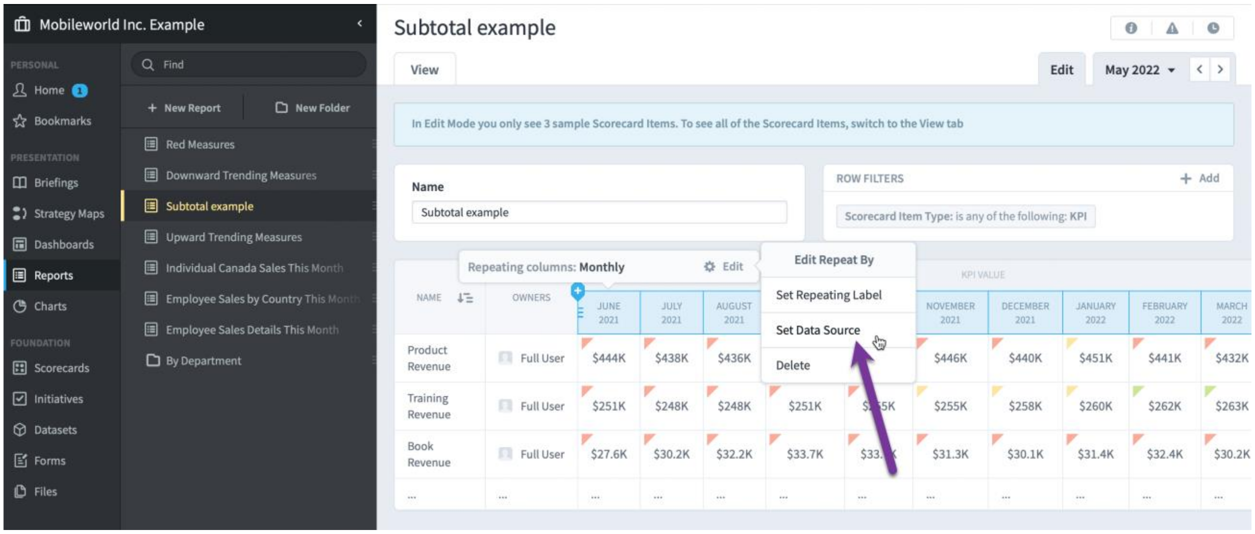


This creates a report that looks like this.

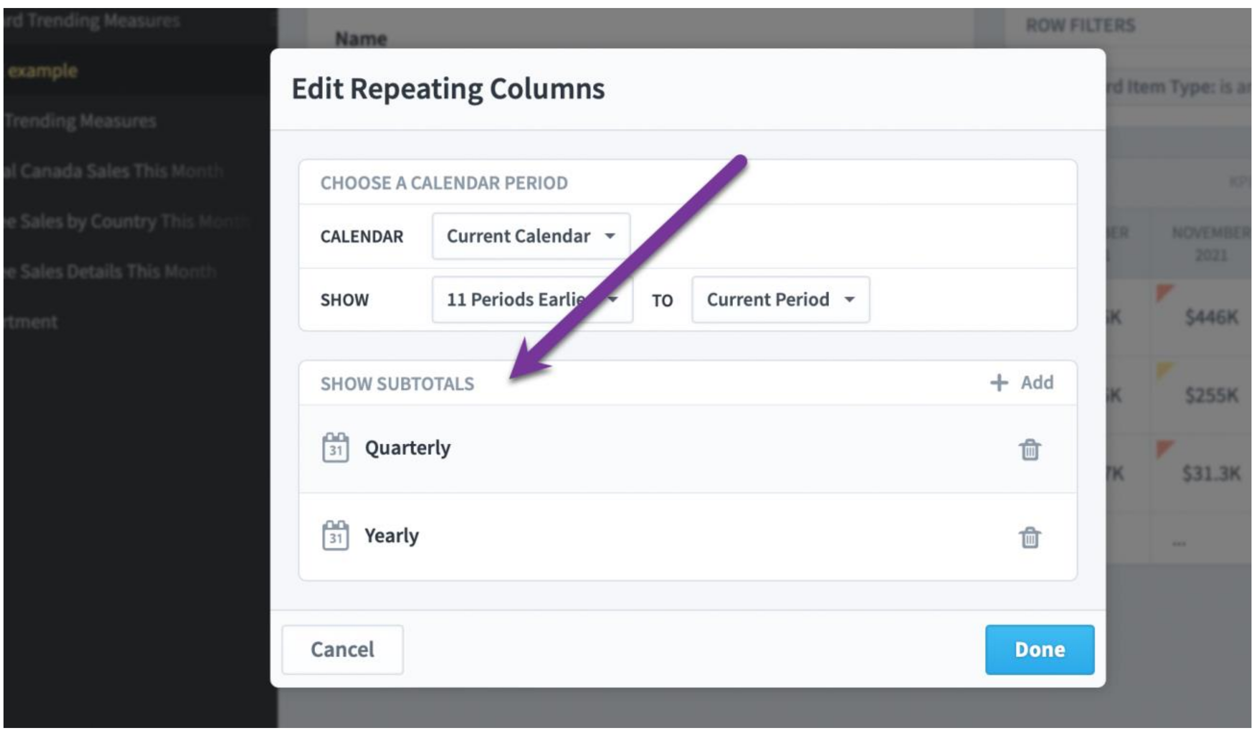
SALES EMPLOYEE	COUNTRY: AUSTRALIA	COUNTRY: CANADA	COUNTRY: UNITED KINGDOM	COUNTRY: UNITED STATES
Delphine Calmes	$4,587	$2,823	$9,467	$33K
Edmond Zehrbach	$5,268	$3,107	$14K	$26.8K
Hollie Pennigton	$4,587	$8,652	$15.2K	$39.6K
Issac Bernhardt	$7,346	$14.5K	$17.3K	$37K
Kym Lavender		$11.4K	$20.9K	
Micheline Turkasz	$10.1K	$9,149	$13.2K	$33.4K
Odell Sheler	$10.4K	$11.7K	$18.3K	$39.5K
Russell Corrick	$25.9K	$18.1K	$34.2K	$28.6K

Subtotal columns in repeating calendar periods

To add subtotal columns to a report, click on a repeating calendar period header and choose “Set Data Source”.



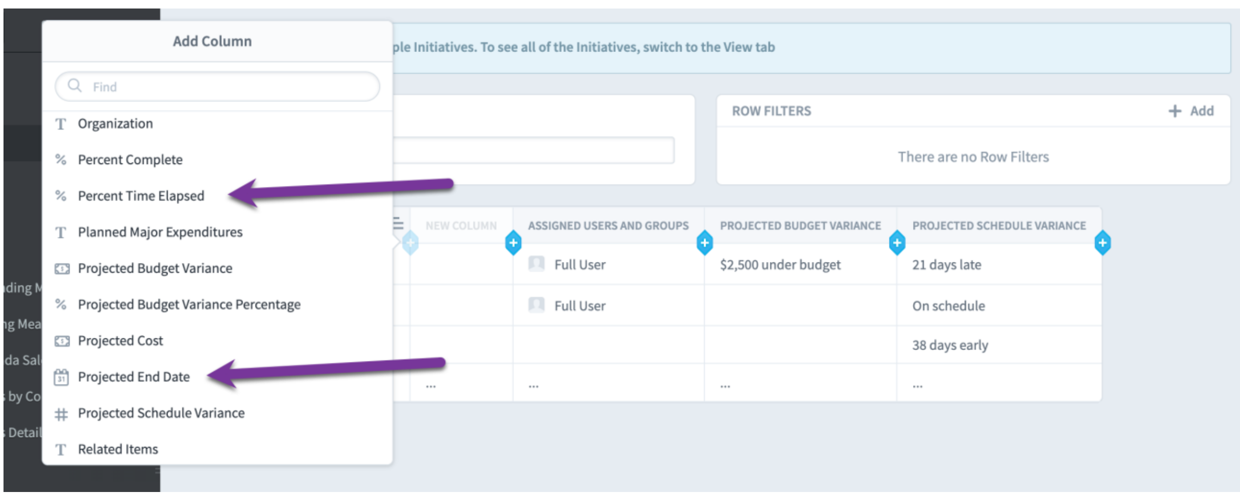
There's a new panel in this dialog where you can choose the calendar(s) you want to use for subtotals. In this example we're showing both quarterly and yearly subtotals.



The resulting report now has subtotals for quarters (purple) and years (yellow).

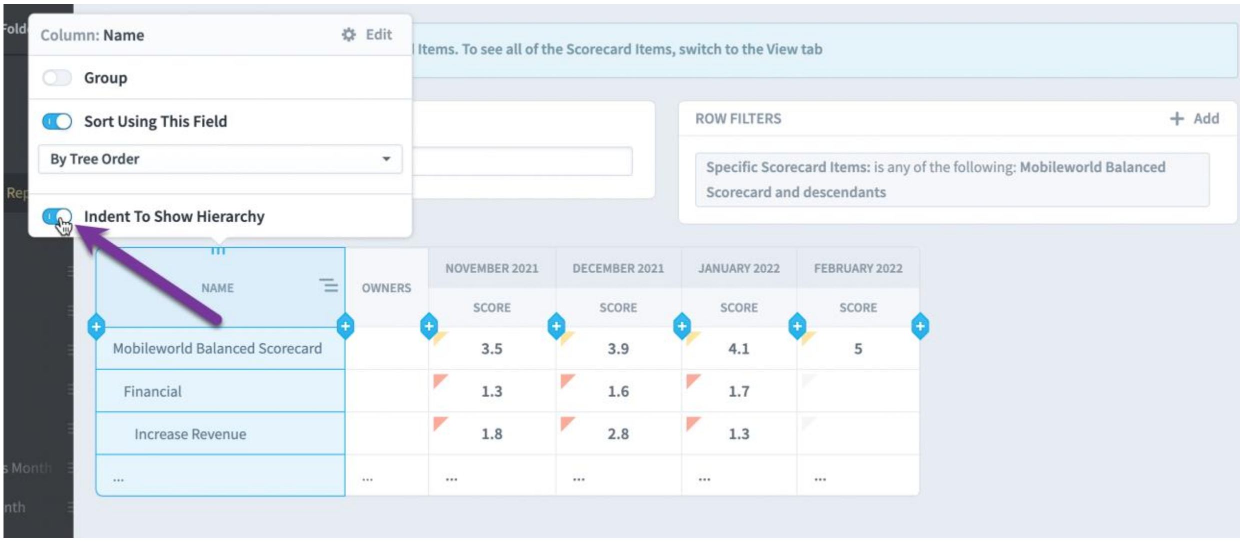
All fields available in initiatives reports

When writing initiative reports, all fields are now available to be added as columns. This includes Days Elapsed, Percent Time Elapsed, and Projected End Date.

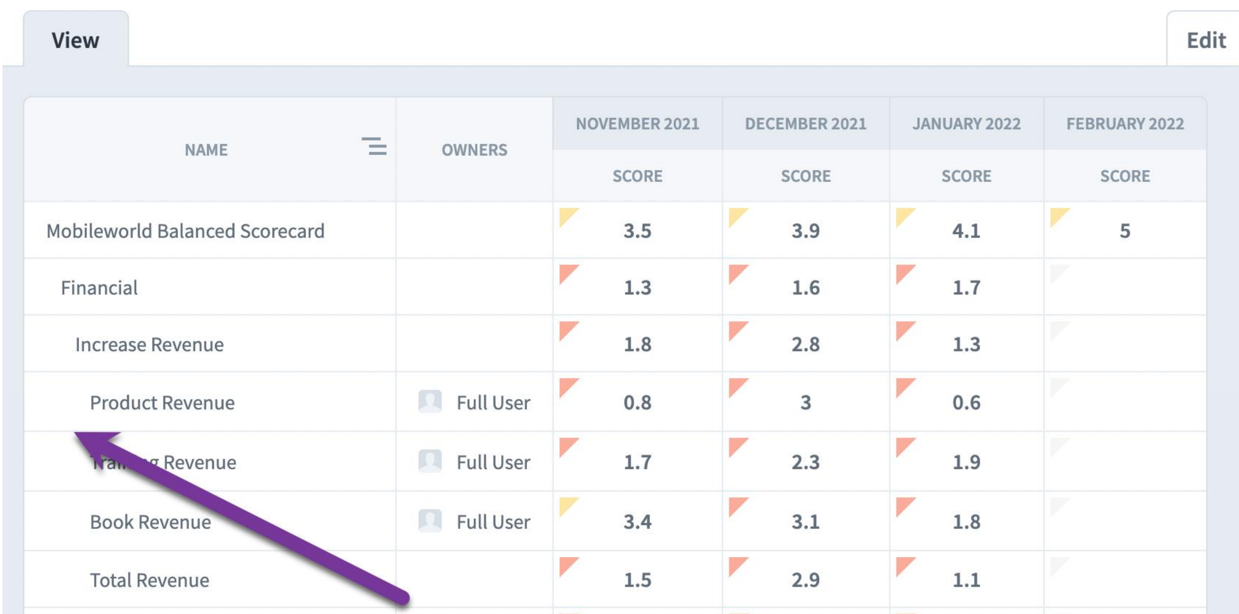


Indent to show hierarchy

There's a new "indent to show hierarchy" toggle on name fields for scorecards and initiatives, as well as dataset rollup tree items for datasets.



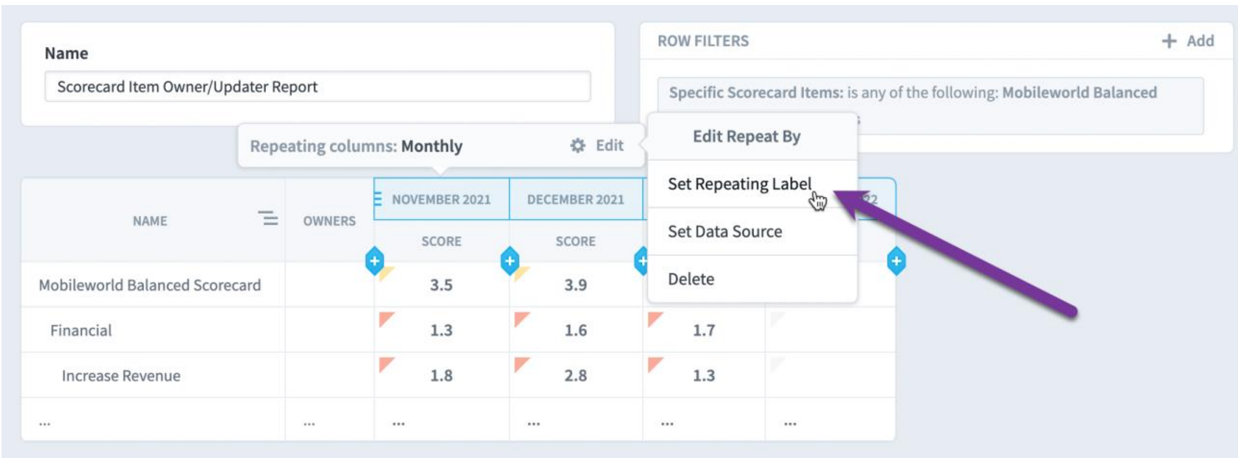
When on, the record values are indented to show their position in the tree.



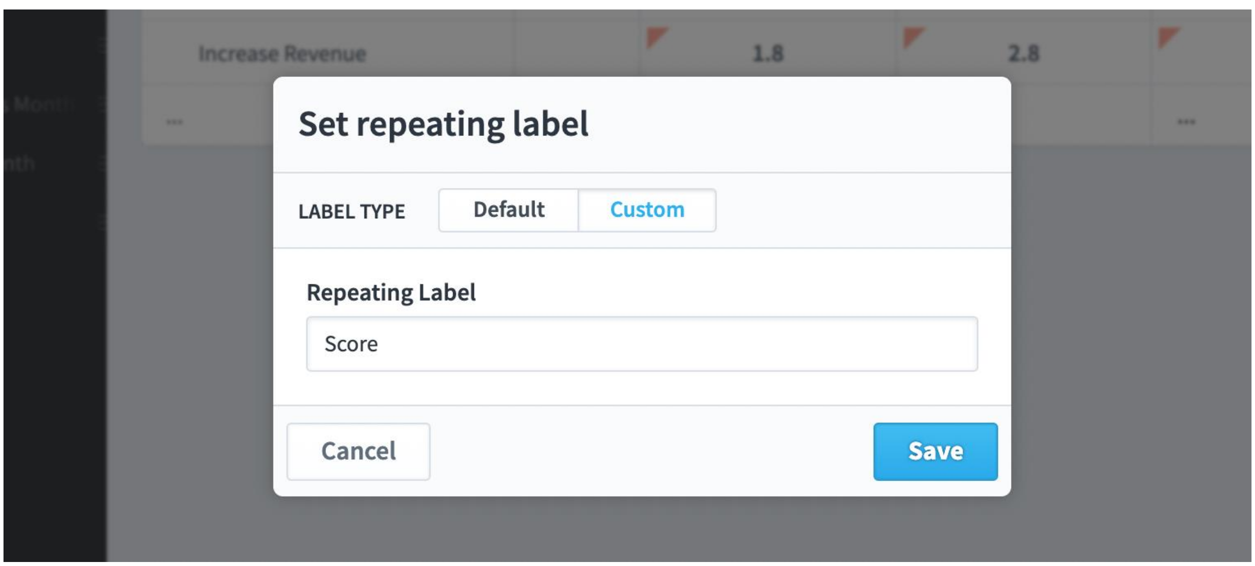
Repeating column labels

You can now edit the labels that show on repeating report values. In this example there's no label by default.

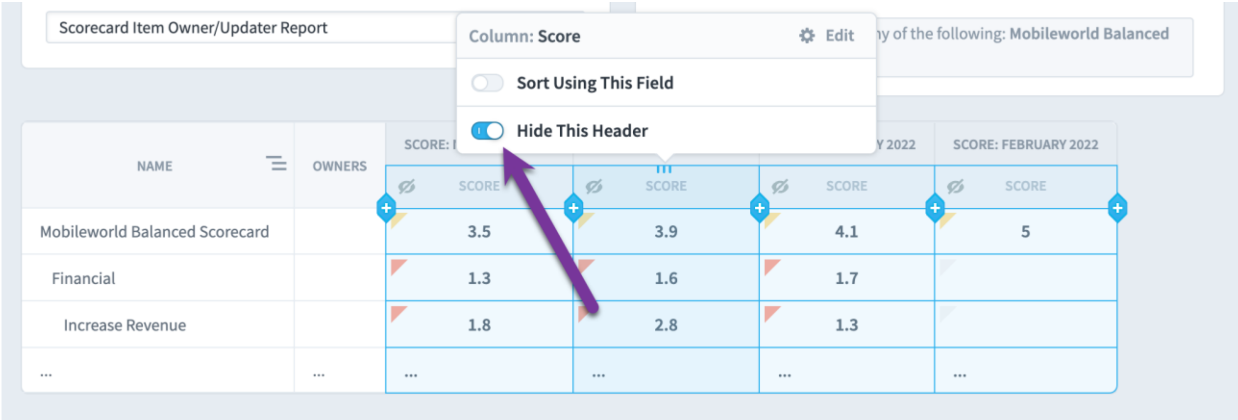
We'll then click on "Set Repeating Label"...



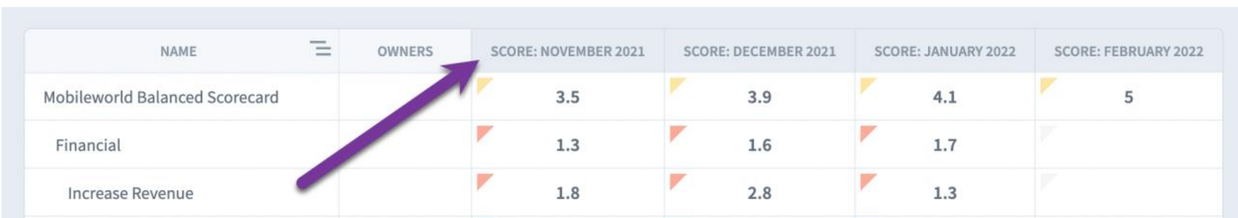
... choose "custom" and make the repeating label "Score".



As you can see, it now prepends "Score" to the repeating value headers. Finally, we'll turn off the score column header.

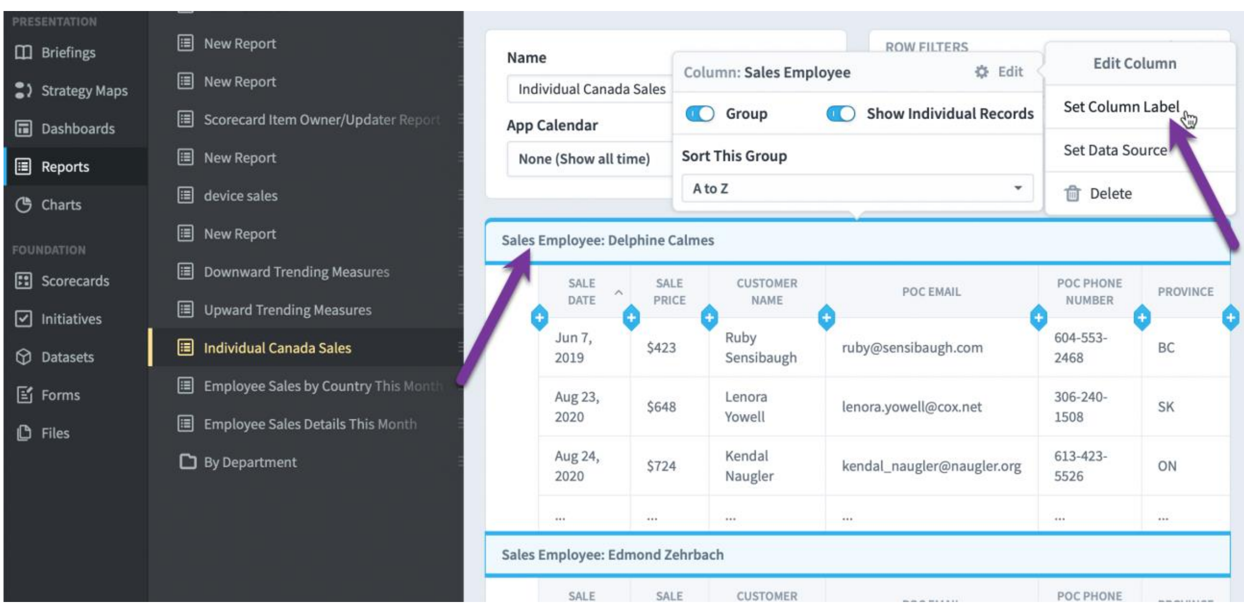


We now see a single header for each column that contains both the label and the calendar period.

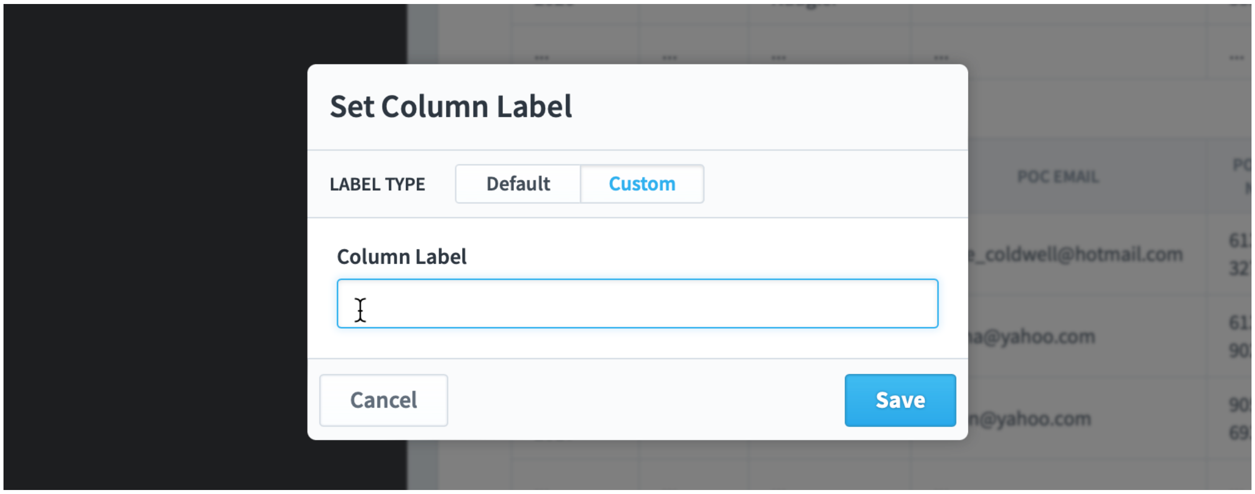


Row group labels

Just like you can add labels to repeating columns, you can also add labels to row groups. In this example the column name is the label by default.

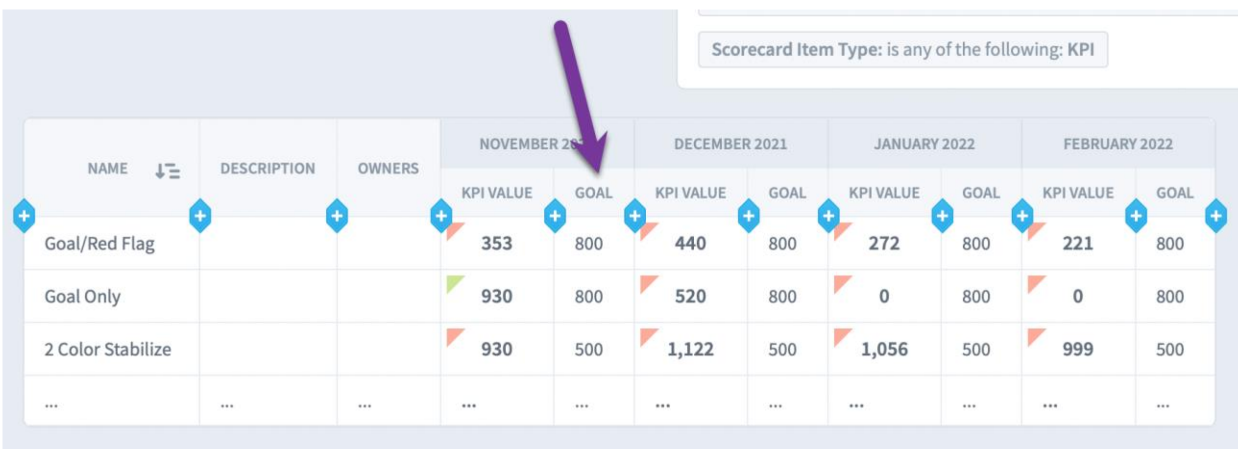


You can change it to custom, however, and use any label. In this example we're turning off the label completely.



Threshold columns start with no colors

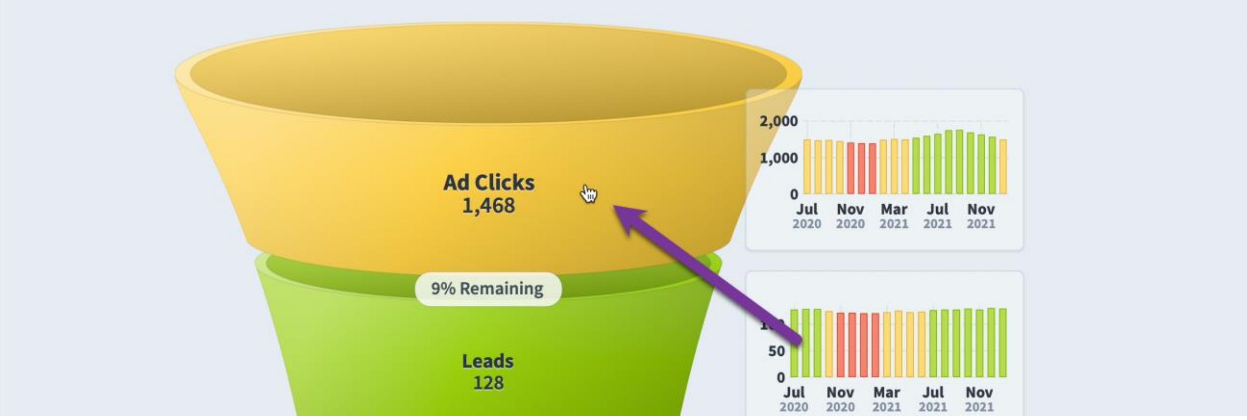
When you add a goal label, it now shows without color formatting by default.



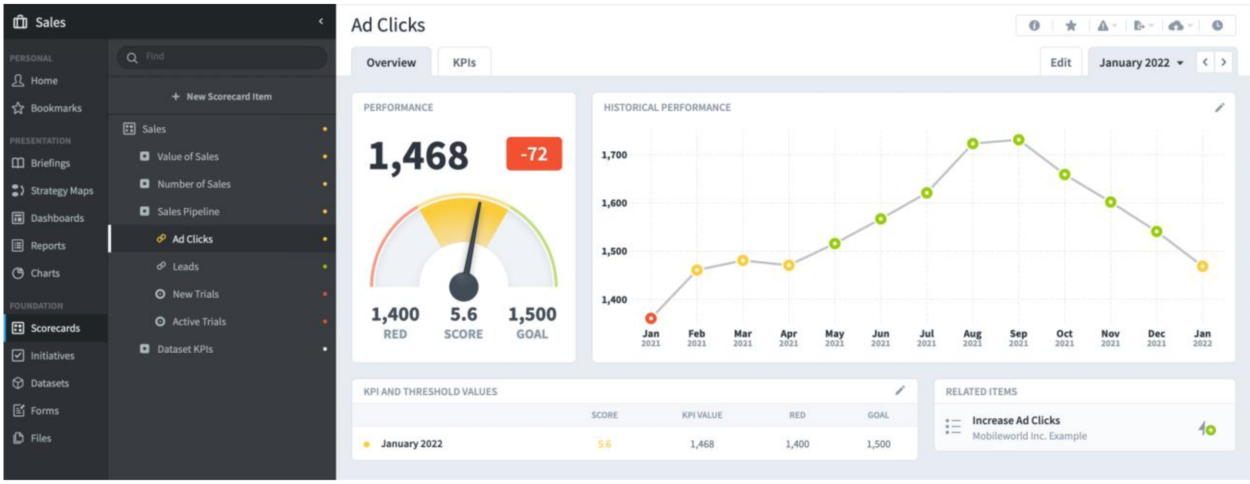
Dashboards

Clickable infographics

You can now click on dashboard infographics to drill down. In this example a funnel is showing a KPI value.

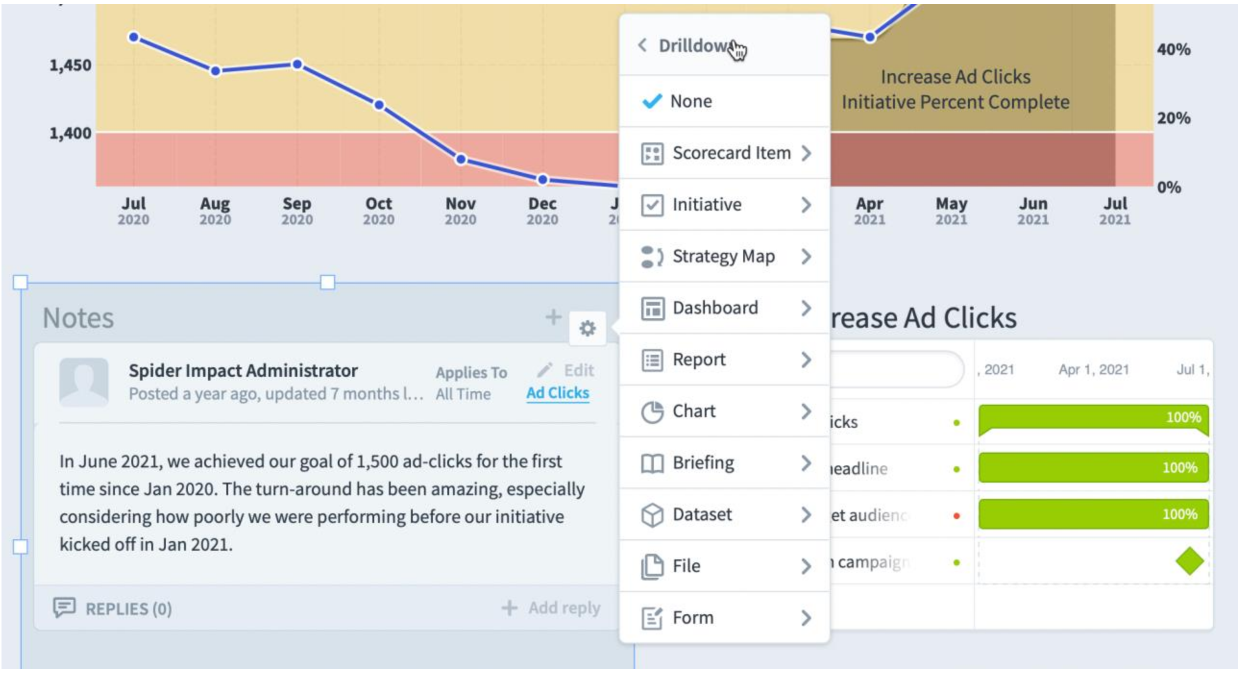


When you click the funnel slice, you're taken to the Scorecards Overview tab by default.



Setting drilldown target for any widget

All dashboard widgets now can drill to any item in the software. In this example we're choosing to have a Notes widget drill somewhere when clicked.



Usability

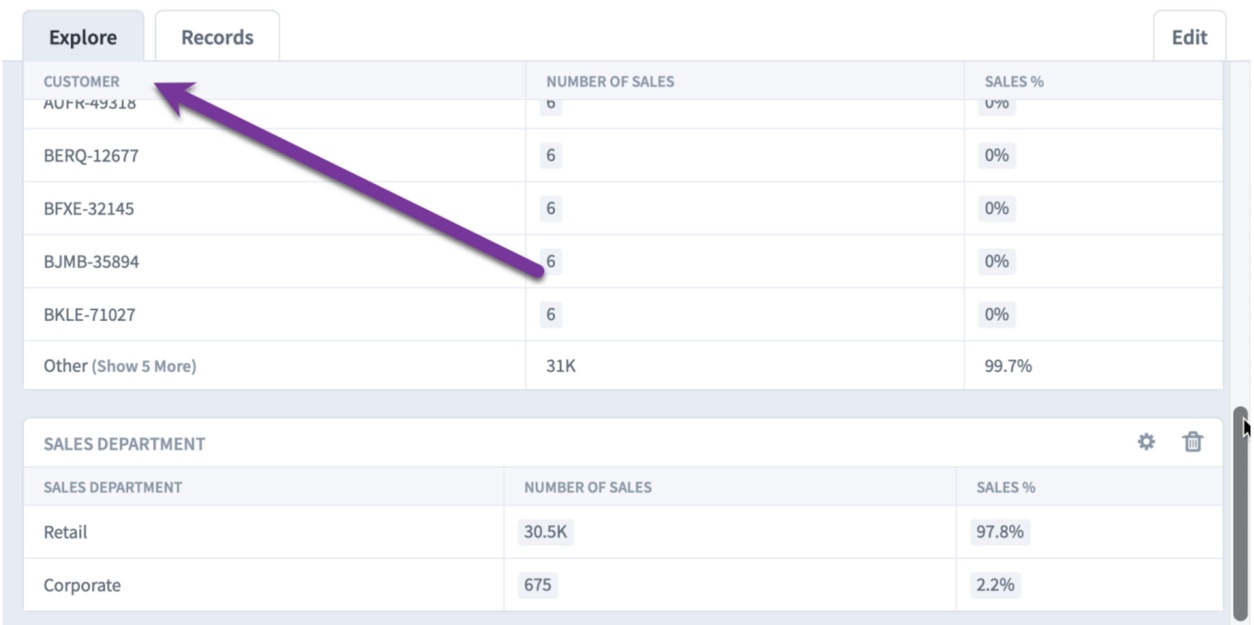
More helpful application titles

The browser tab titles now show a name specific to the page they're showing. This is very helpful when working with multiple browser tabs.

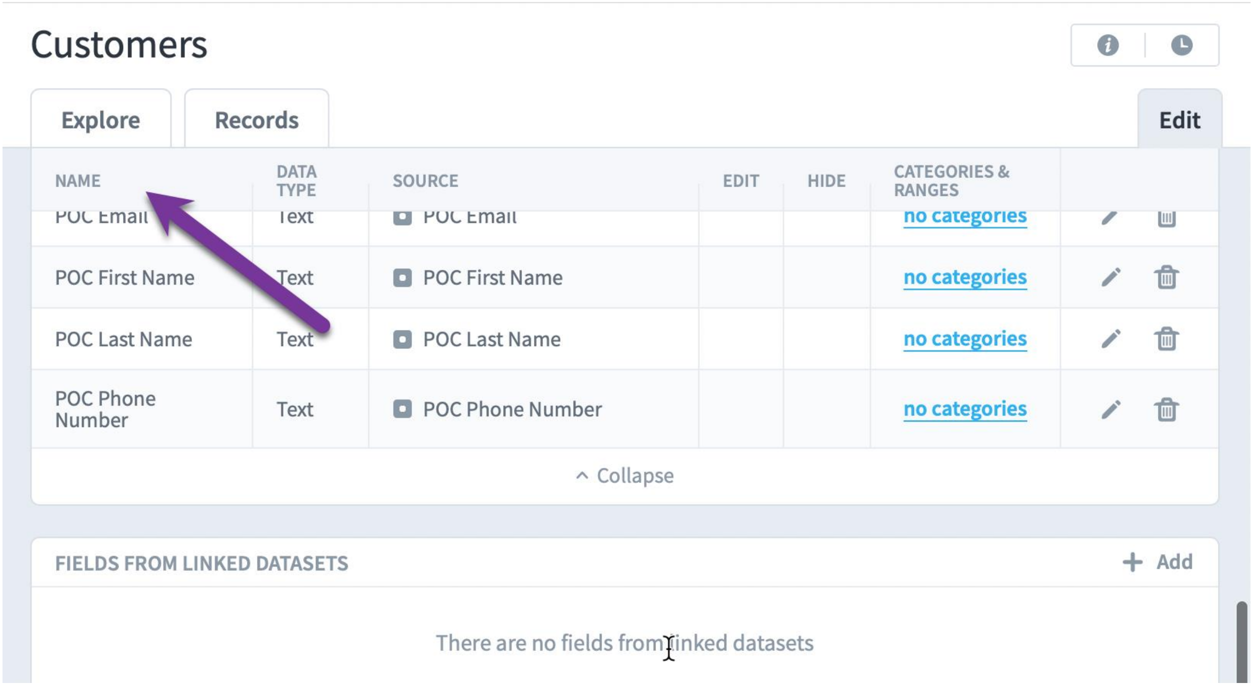
Sticky table headers

Many tables now have sticky headers that stay in place when you scroll. For example, here's the Datasets Records tab showing the column names in the header as you scroll.

This also works when there are multiple tables on a page. Here's the Datasets Explore tab.

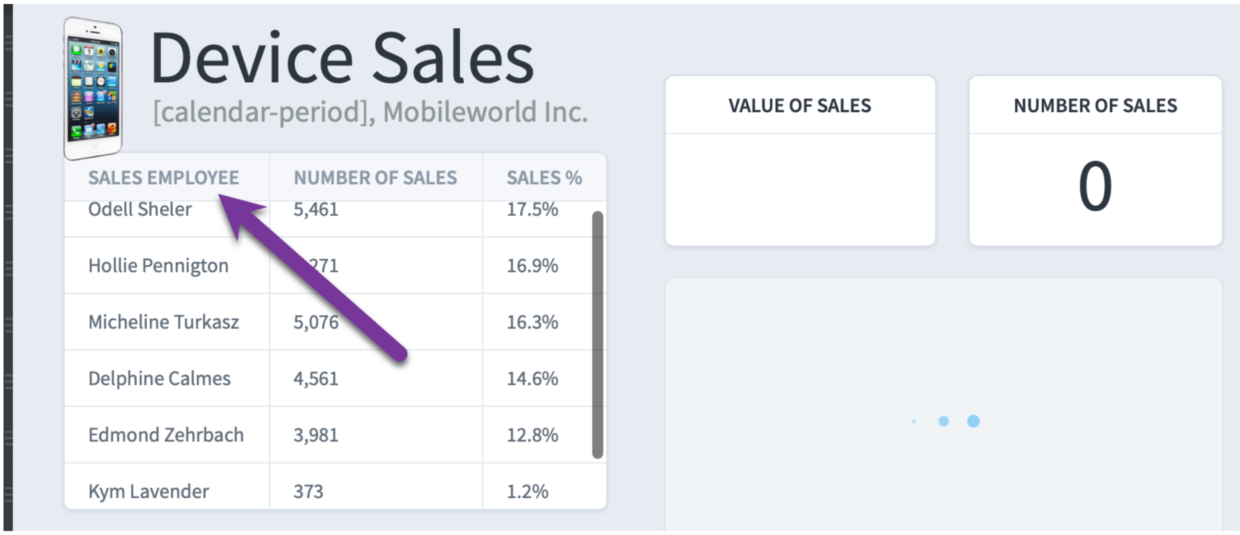


It also works for tables on the Datasets Edit tab.



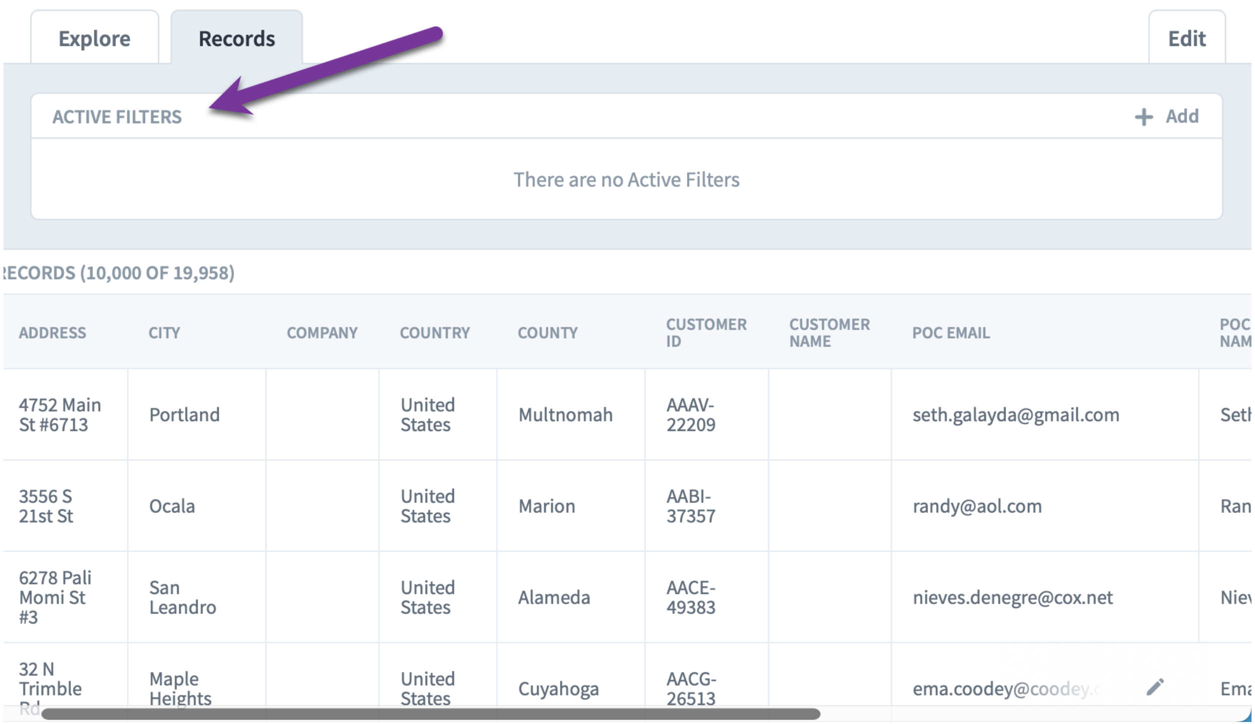
This is the Scorecards KPIs tab.

Finally, the headers of dashboard table widgets stay in place when they have solid backgrounds.



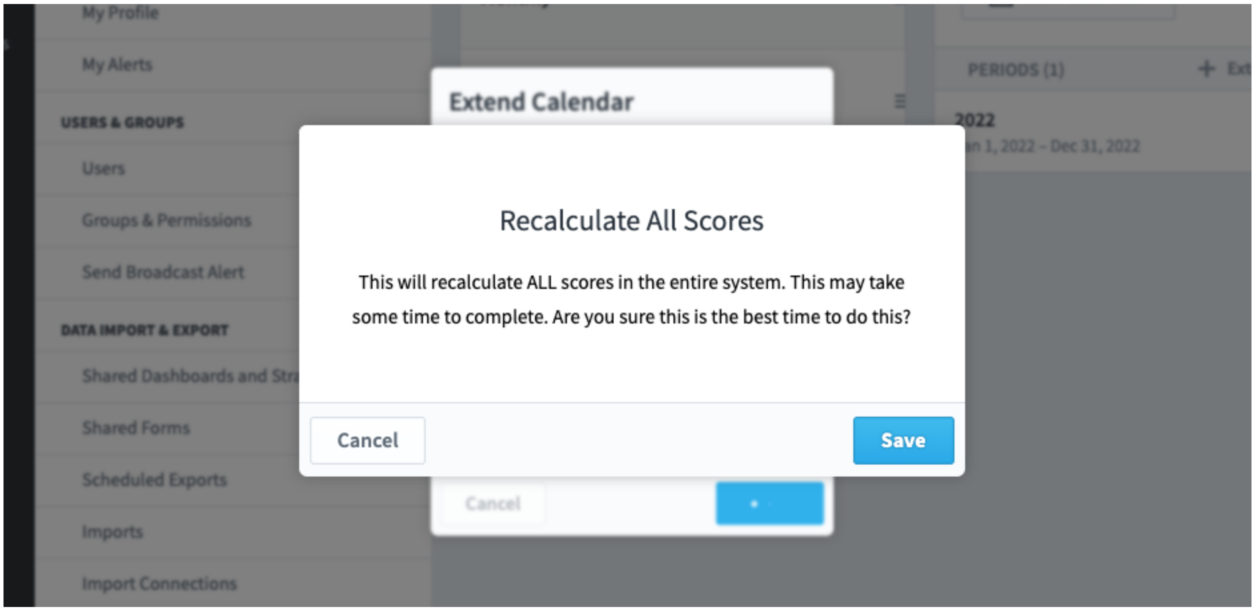
Sticky Dataset Records filter panel

The Datasets Records tab often requires horizontal scrolling to see all columns. The Active Filters panel now stays in place on the top of the screen when scrolling horizontally.

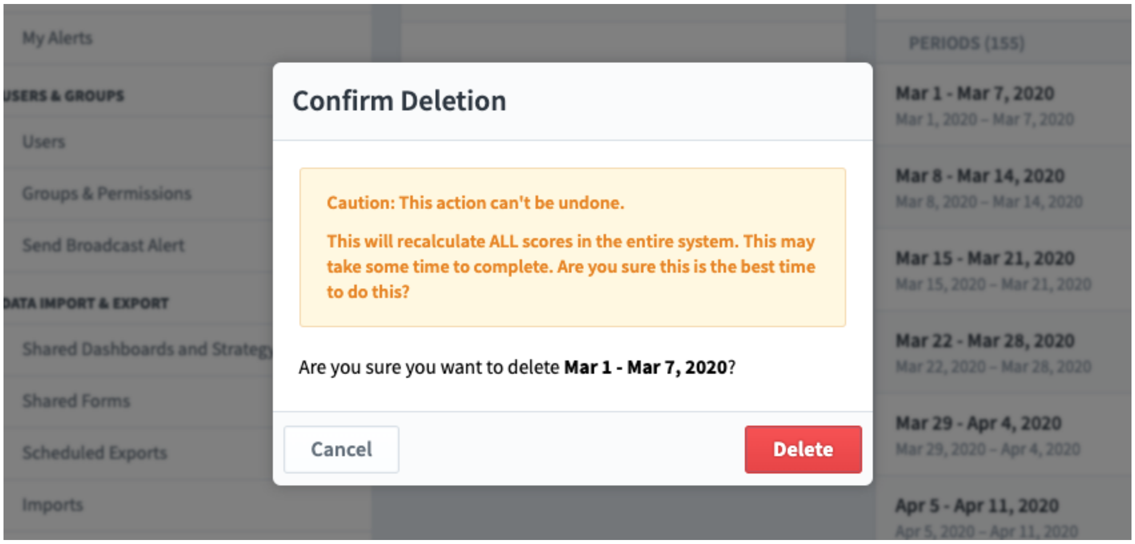


Warnings before score recalculation

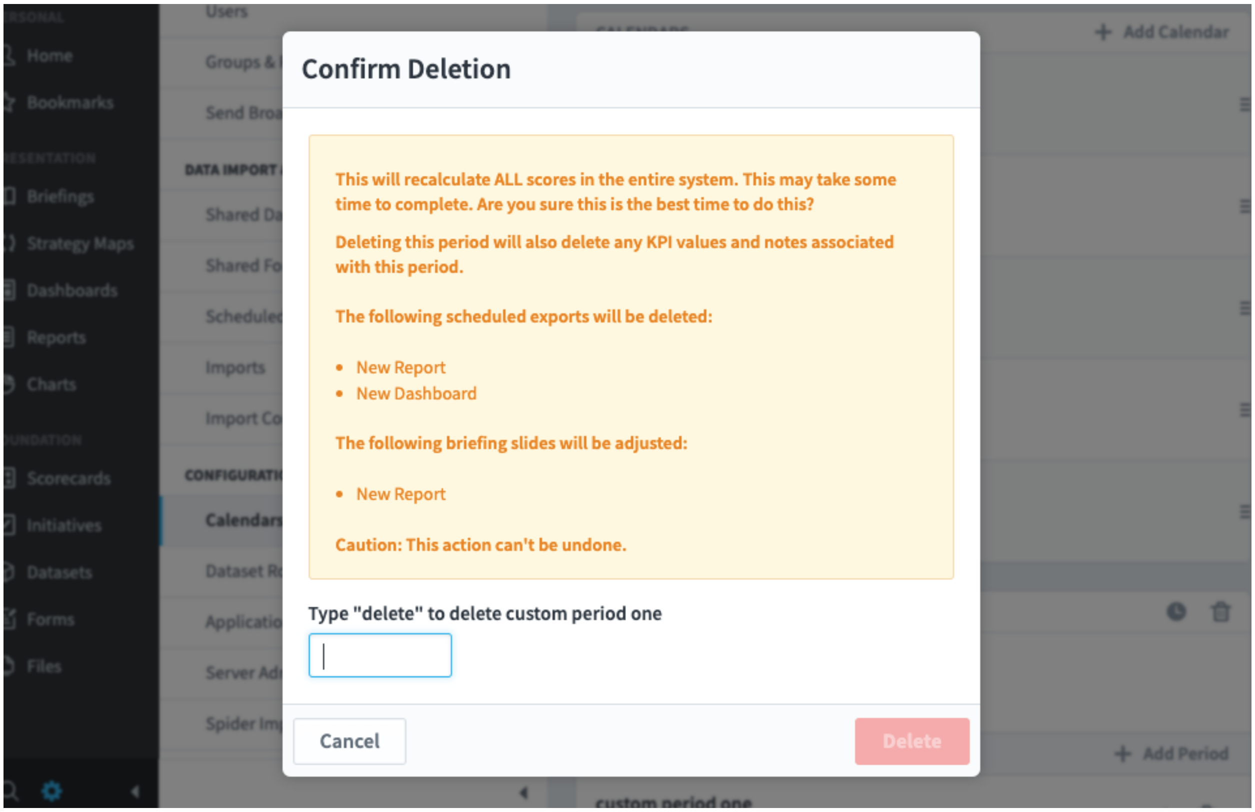
Recalculating all scorecard item scores in Spider Impact can take several hours or longer for customers who have thousands of scorecards. Because of this, there are now warnings for actions that require a full recalculation. For example, this is what it now looks like when extending calendar periods.



This is what deleting calendar periods looks like.

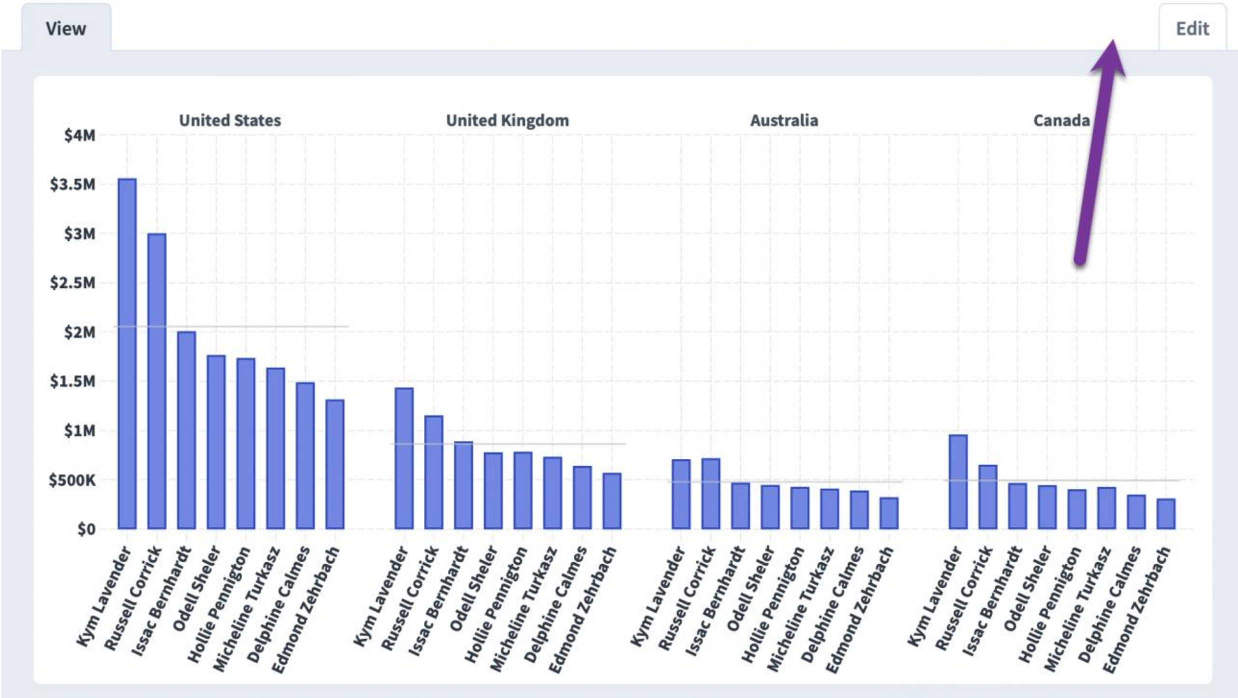


And this is the new appearance for deleting calendars.



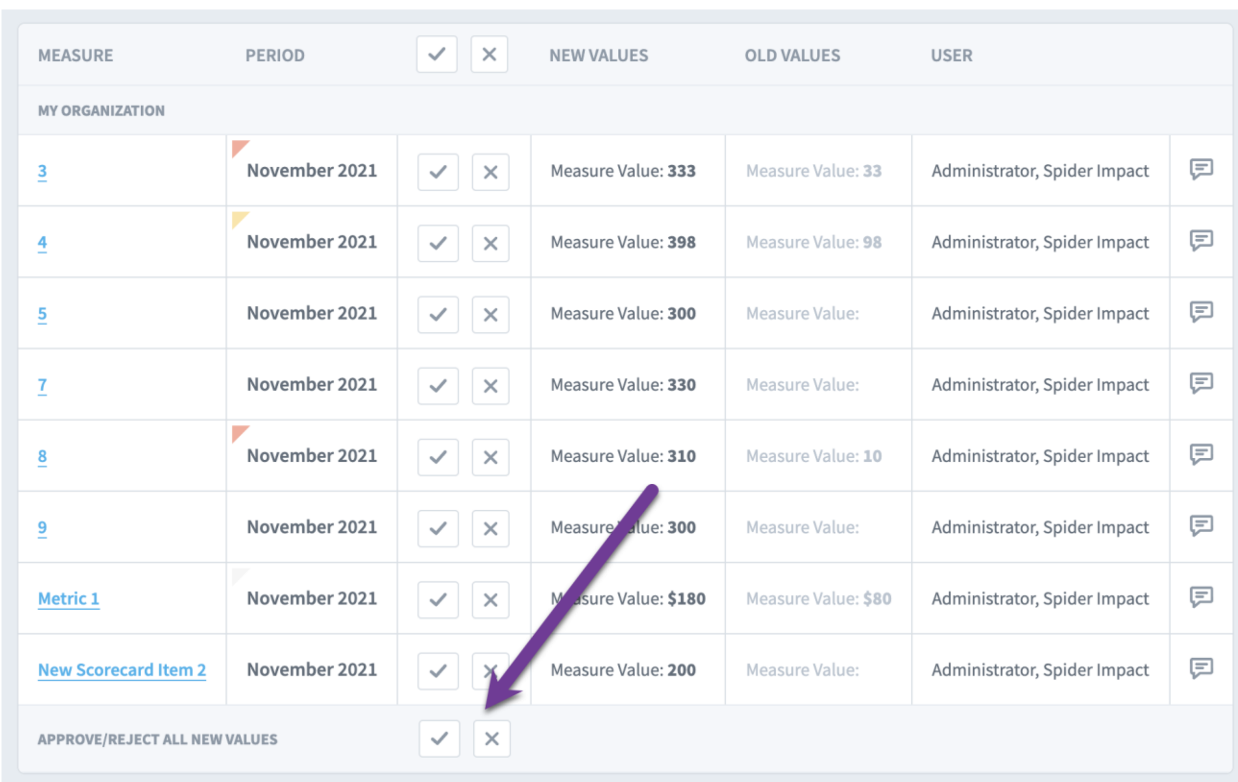
Only show calendar period selector when needed

Version 5.5 has started the process of removing the calendar period selector when not used. For example, this chart is showing data for all time, so the calendar period selector isn't showing.



Improved KPI value approve & reject buttons

There are now "approve all" and "reject all" buttons at the bottom and top of the list of KPI values to approve rather than just the top. This makes it easier to scan all of the values and then quickly approve them all.



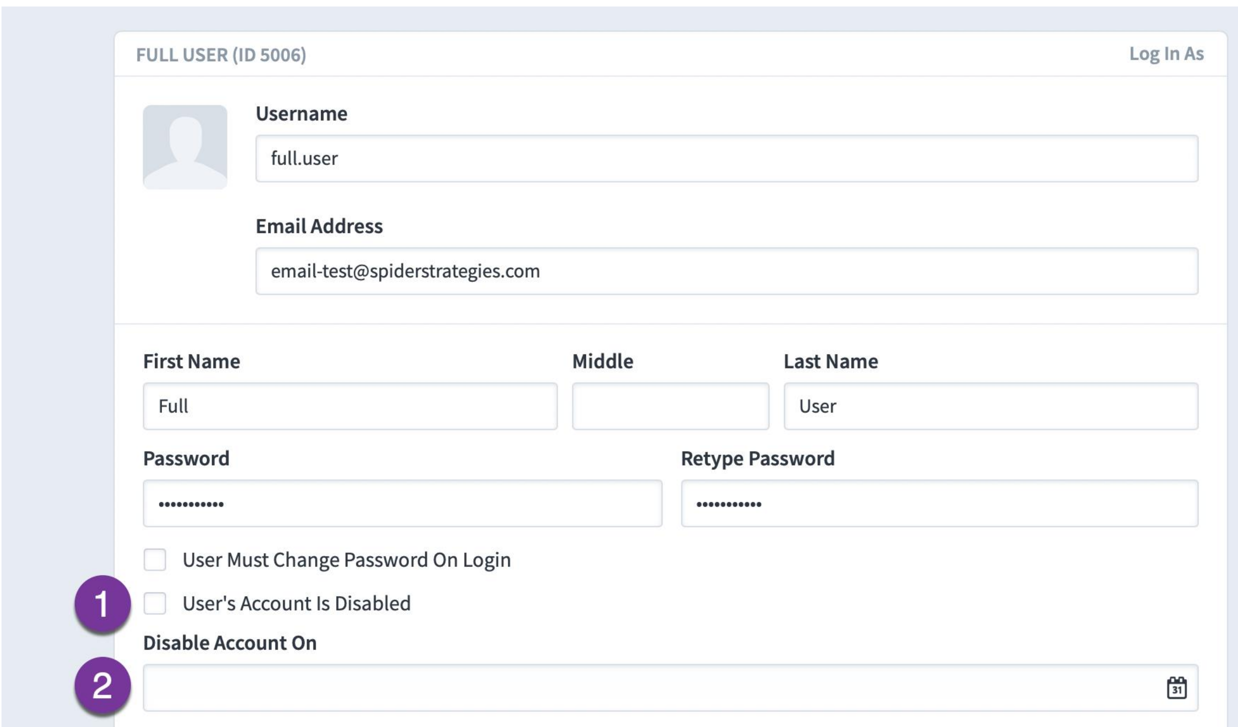
MEASURE	PERIOD	✓	×	NEW VALUES	OLD VALUES	USER	
MY ORGANIZATION							
3	November 2021	✓	×	Measure Value: **333**	Measure Value: 33	Administrator, Spider Impact	
4	November 2021	✓	×	Measure Value: **398**	Measure Value: 98	Administrator, Spider Impact	
5	November 2021	✓	×	Measure Value: **300**	Measure Value:	Administrator, Spider Impact	
7	November 2021	✓	×	Measure Value: **330**	Measure Value:	Administrator, Spider Impact	
8	November 2021	✓	×	Measure Value: **310**	Measure Value: 10	Administrator, Spider Impact	
9	November 2021	✓	×	Measure Value: **300**	Measure Value:	Administrator, Spider Impact	
Metric 1	November 2021	✓	×	Measure Value: **$180**	Measure Value: $80	Administrator, Spider Impact	
New Scorecard Item 2	November 2021	✓	×	Measure Value: **200**	Measure Value:	Administrator, Spider Impact	
APPROVE/REJECT ALL NEW VALUES		✓	×				

Administration & Security

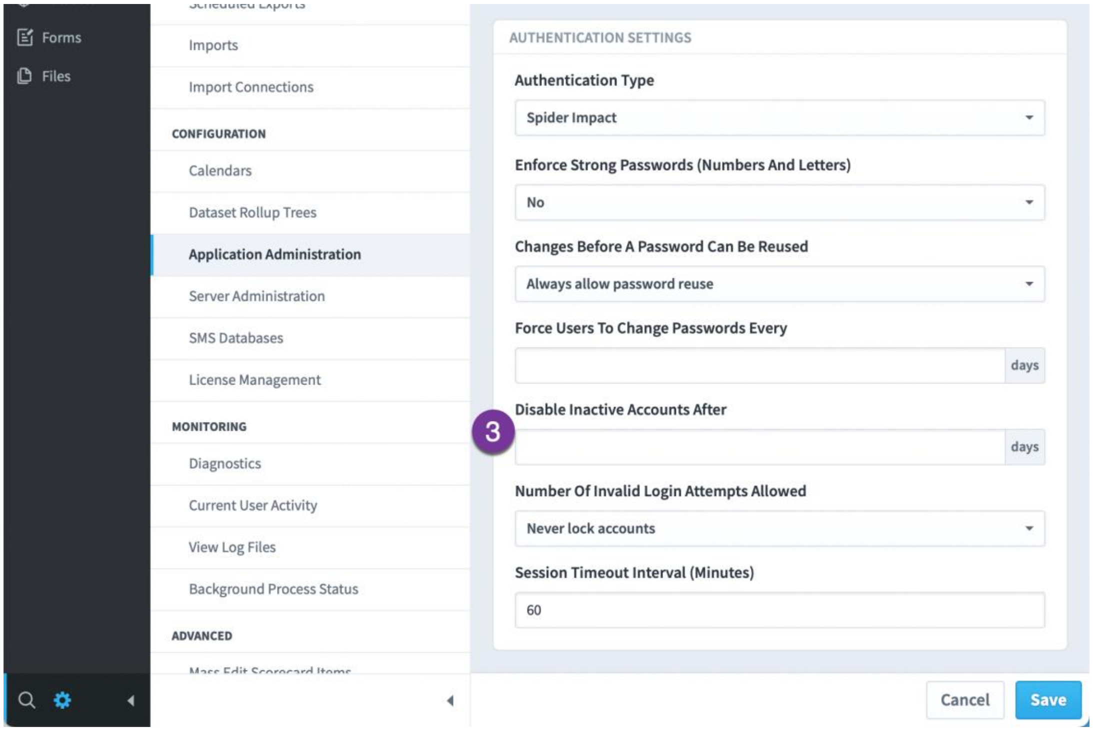
Disabled accounts

There are several new features for disabling and enabling user accounts.

1. People who have permission to edit a user can immediately disable and enable that user's account via the "User's account is disabled" checkbox.
2. People who have permission to edit a user can automatically disable that user's account in the future by setting a date in the "Disable account on" field.



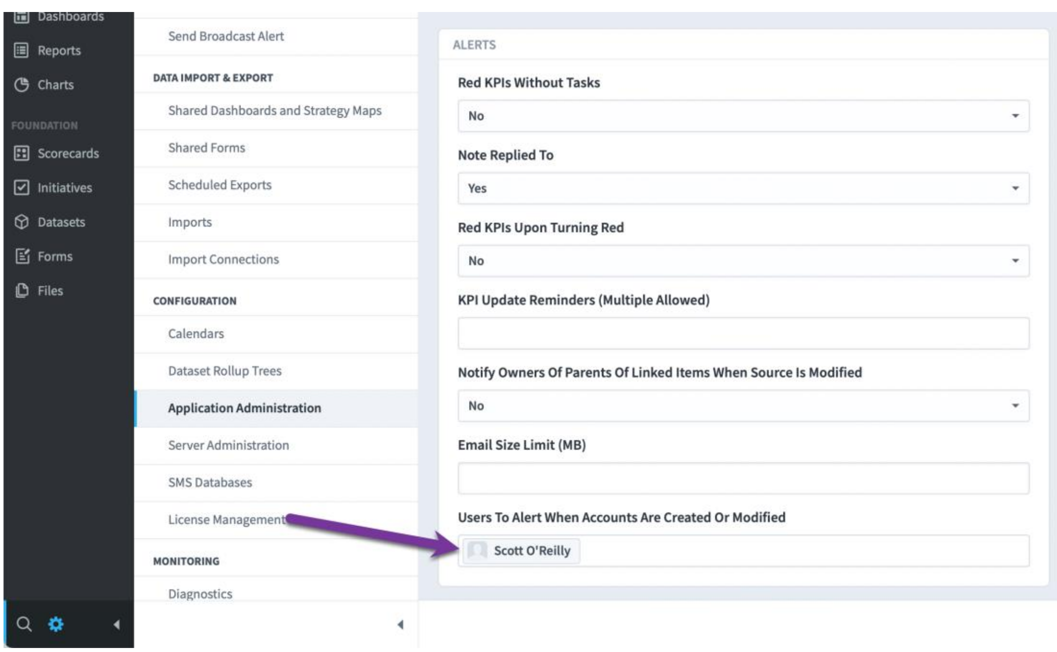
3. Unused accounts can be automatically disabled after a period of inactivity. This setting is managed by application administrators.



The software will automatically send out emails about disabled accounts. For example, users will be warned 14 days before an account is disabled, as well as at the time of the account being disabled.

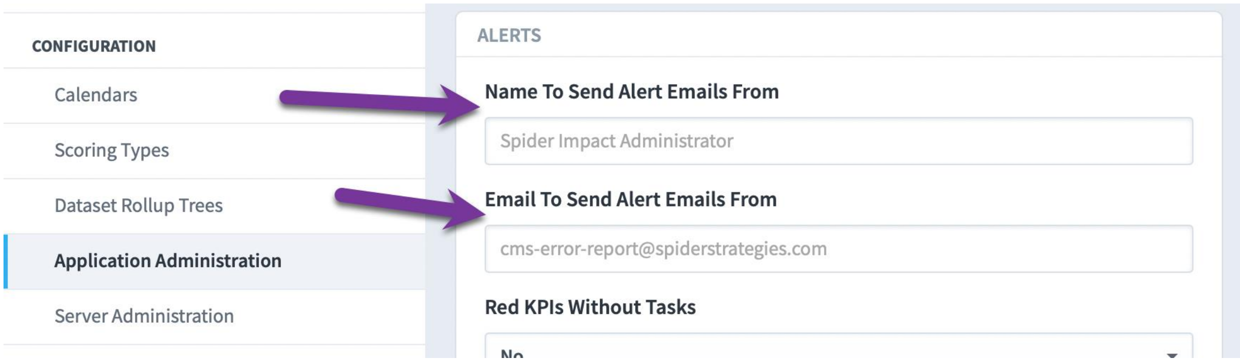
User modification alerts

System administrators can now receive alerts whenever a user is created, modified, or deleted.



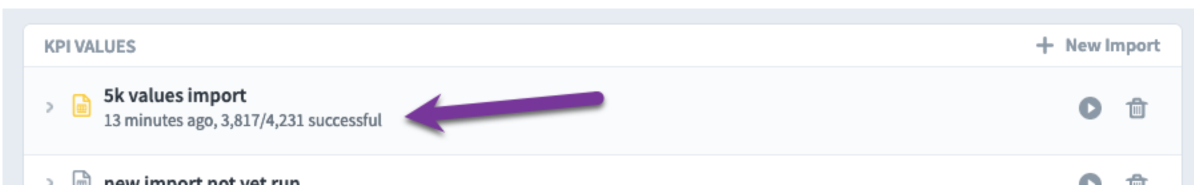
Configure alert sender's name and email address

In Admin > Application Administration you can now configure the name and email address that users will receive alert emails from.



Import collapsed view shows more information

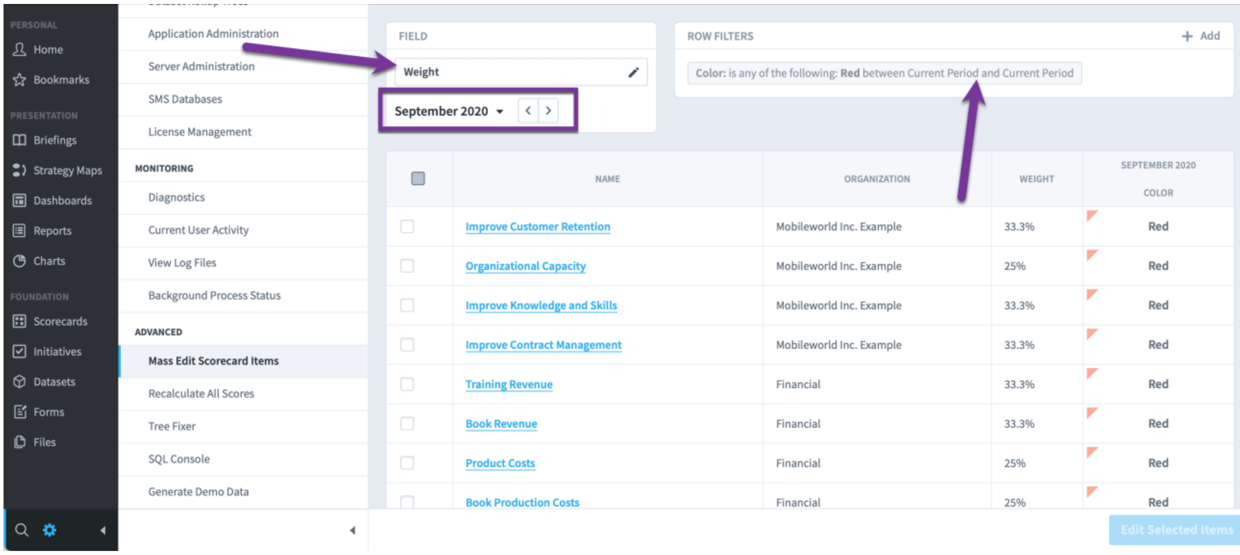
Imports now show more information when they're not expanded, like how long ago the import ran and how many records were successfully imported.



Calendar period selector in mass-edit

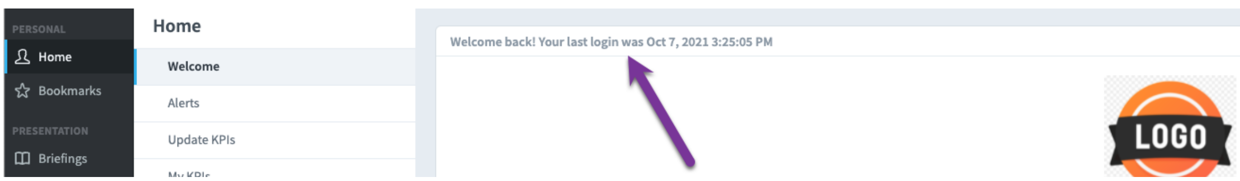
There is now a calendar period selector in Mass Edit Scorecard Items. This is helpful in the following scenarios:

- Row filters that reference performance
- Weights that change over time
- Showing/hiding scorecard items with start and end dates

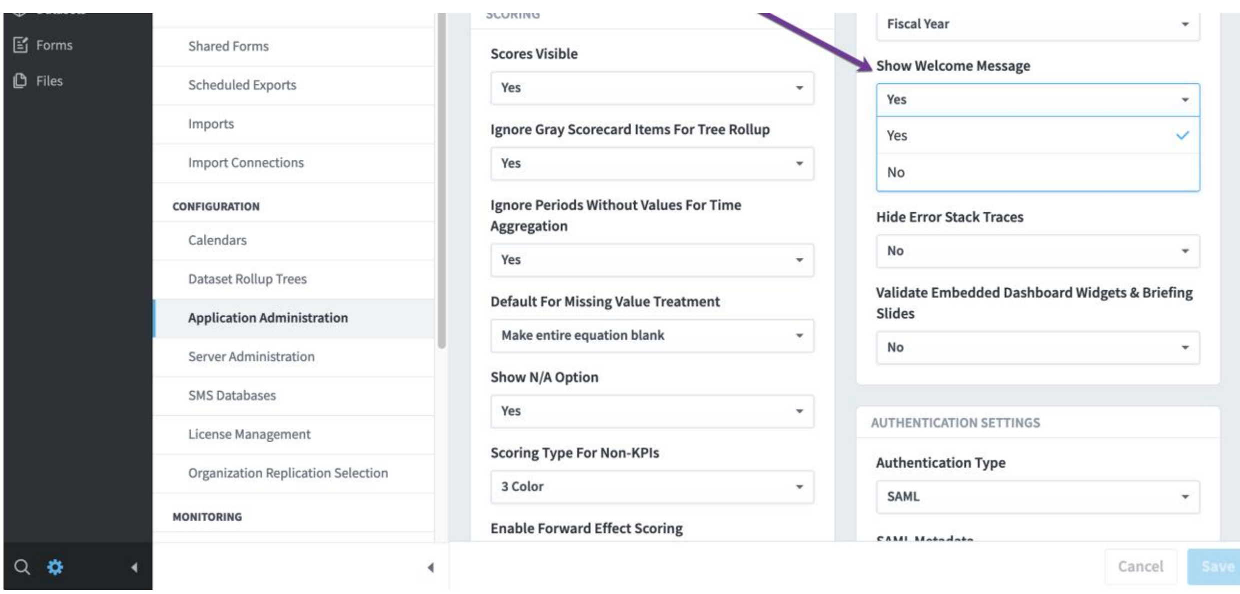


Show time of last login

The time of the last login is now shown in the header of the welcome message on the Welcome page.

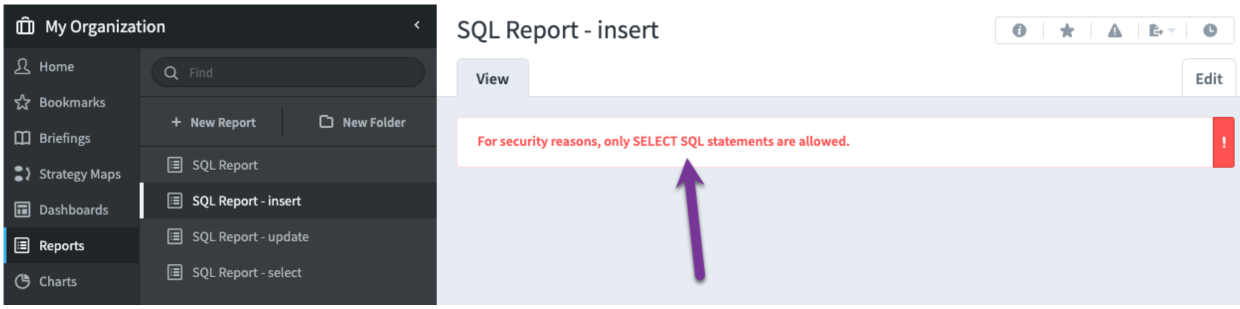


The welcome message panel only shows if "Show Welcome Message" is enabled in Application Administration.



SQL reports can't modify the database

SQL Reports in the Reports section can now only show the results of `SELECT` queries and cannot modify the database. Users with the correct permissions can still use the SQL Console in the Administration section to modify the database if this functionality is enabled.



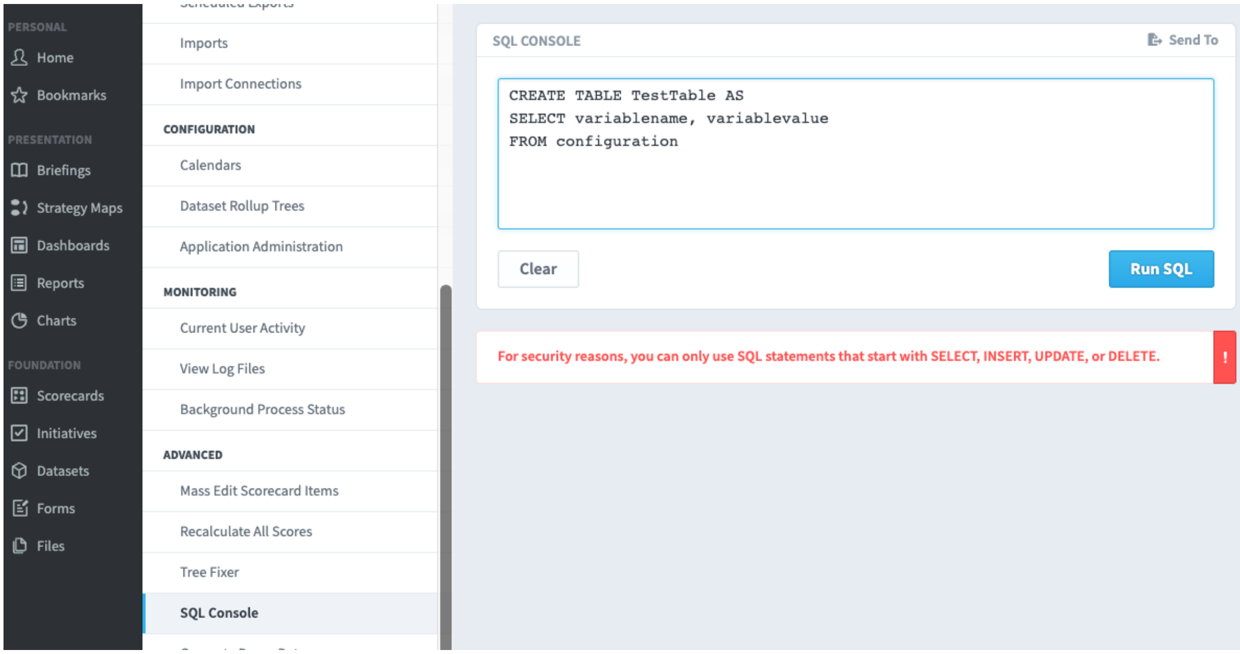
Enhanced SQL Console security

For security purposes, the SQL Console in the Administration section can no longer execute commands on other databases or run data definition language (DDL) statements. The following commands will not run, regardless of permissions or configuration settings:

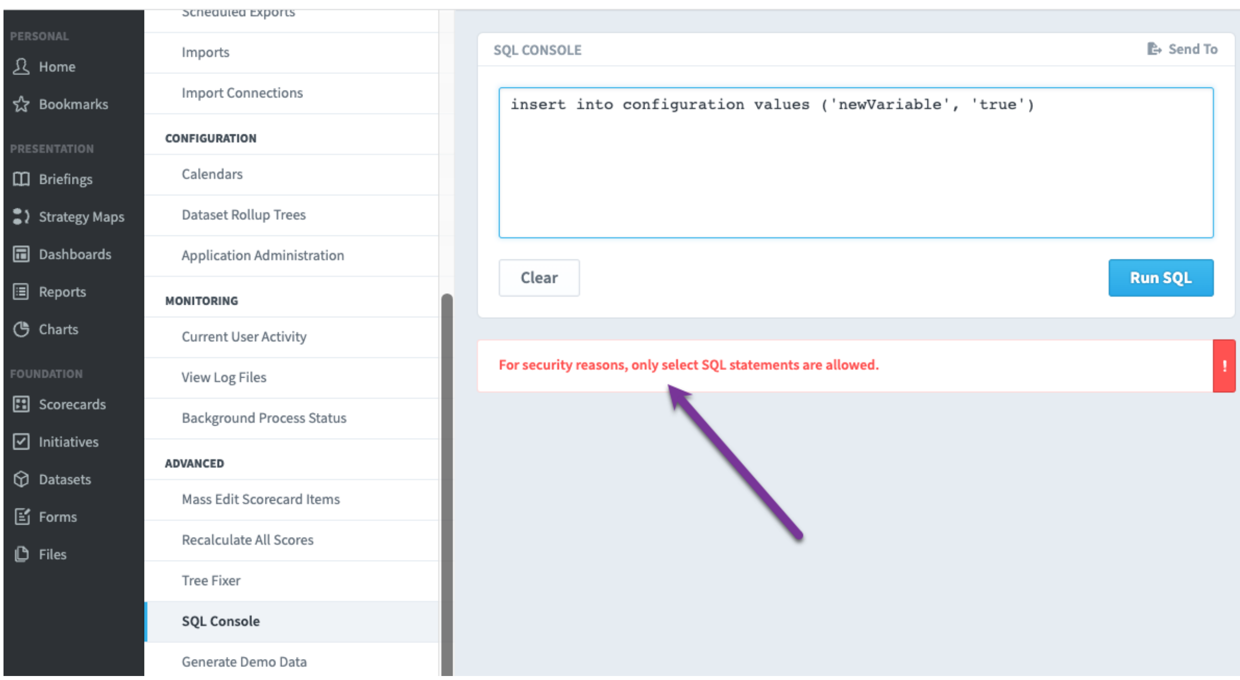
- USE
- CREATE
- ALTER
- DROP
- GRANT
- REVOKE
- ANALYZE
- AUDIT
- COMMENT

Only the following SQL commands are now allowed in the SQL Console.

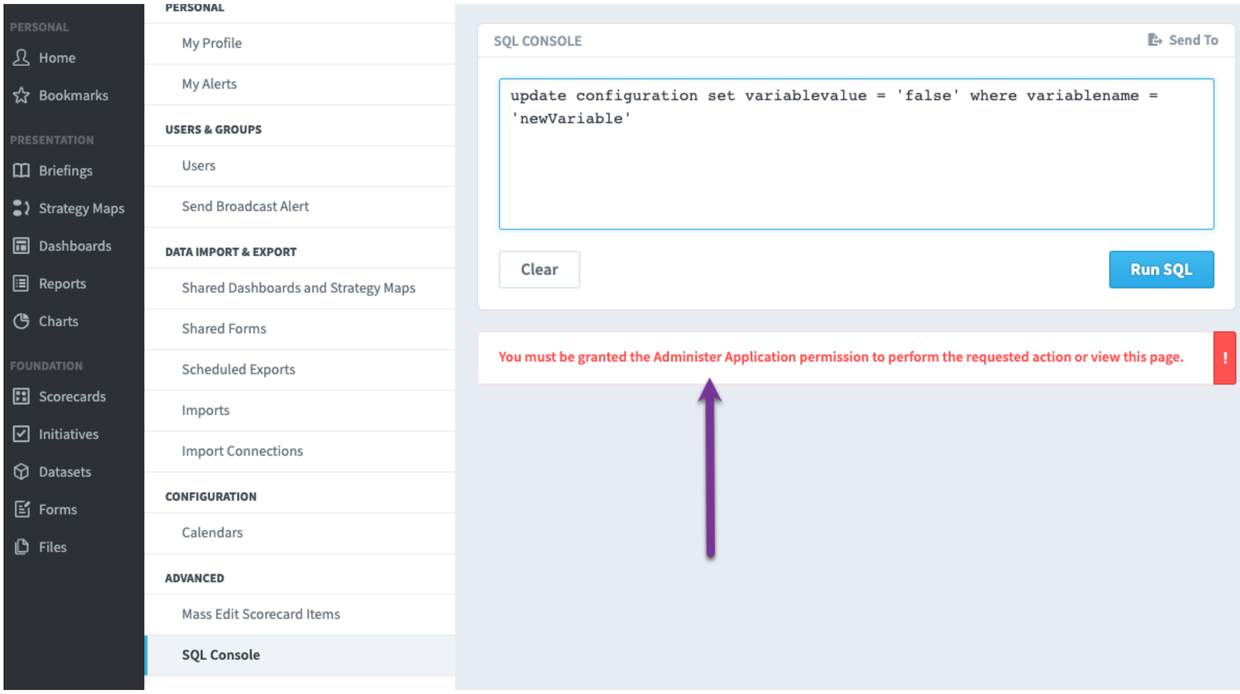
- SELECT
- INSERT
- UPDATE
- DELETE



For further security, you can still prevent the SQL Console from writing to the database at all by adding `readOnlySqlConsole=true` to the Spider Home's `config.properties` file. This prevents anything other than a `SELECT` statement from being run in the SQL Console, regardless of user permissions.



Finally, even if `INSERT`, `UPDATE`, and `DELETE` statements are enabled for the SQL Console, it's still the case that only users with the Administer Application permissions can run them.



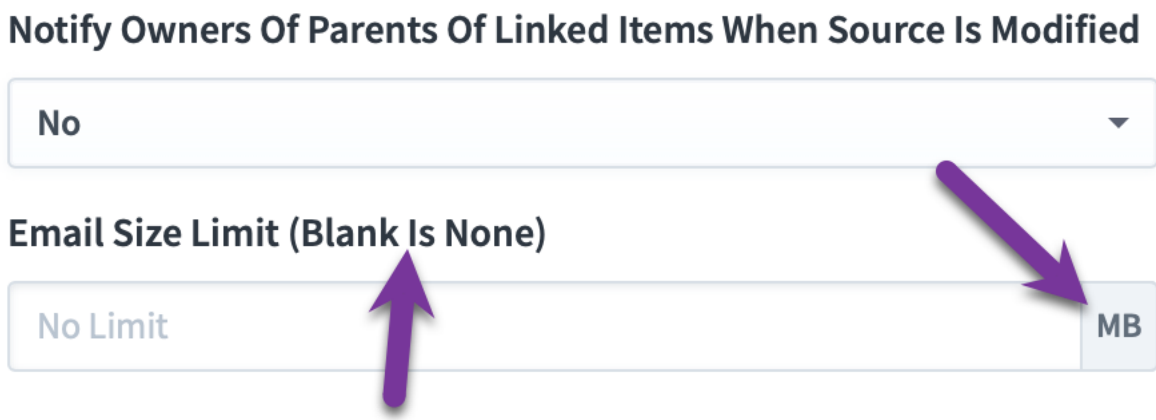
SQL Console improvements

There are several enhancements improving the experience of administrators using the SQL console.

- Undo/Redo now work for editing text between running queries
- Pressing CTRL/CMD + ENTER will execute the query
- Focus remains in the text area after executing the query
- Highlighting a query or part of a query will only execute that part
- Semi-colons can be used to break up statements. If the text position cursor is within a query ending with a semi-colon, only that query will run.

Improved Application Administration options

All typed in configuration options in Application Administration now share a common appearance. Unit labels are now included when they make sense, and there are explanations for what blank values mean.



Other

In addition to many bug fixes, there were several other notable enhancements in this release, including:

- Clicking away from open filter widget doesn't zoom
- Improved display of scoring type filter in reports
- Automatically choose shortest path to linked dataset
- Improved date instructions on imports
- Permissions changes to logged in users take effect immediately
- Logged in users are logged out when their accounts are deleted
- User sessions IDs are logged when created and destroyed
- Improved SQL Console security
- Improved exports by upgrading chromium
- "Compare Time Periods" now includes dates outside of defined calendars
- Link to source organization added to organization info dialogs for templated copies
- Allow creating new dataset records on the Records tab without a primary key
- Add date filter when clicking on non-snapshot dataset KPIs
- Change calendar names for Arabic
- Move dashboards, reports, charts, etc across projects
- Add contains and does not contain functions for dataset field calculations
- Dataset KPIs not based on "number of" show blank instead of 0

- Use Amazon Aurora MySQL-Compatible Edition as a data source
- Option to encrypt SAML Assertions
- Updated SQL report icon
- Updated database icon
- Show seconds when needed on import schedule
- Improve date import instructions
- Warning when software is experiencing heavy use
- Single dataset date field always chosen for repeating chart values
- Show outlines around all colored circles
- Don't display entire dataset equation on edit tab