

# 194.1-2 & 195.0 Release Notes

1 July 2023

# Contents

## 194.1-2

### Issue Resolutions

- Gantt chart labels not responding to background colors
- Participant window performance regression
- Enterprise homepage auto-assignment can cause error when assigning roles
- Chart labels not responding to background colors

## 195.0

### Enhancements

- Card Drill Down
- Ability to display a value from Associated items on a Card section
- Ability to Create Work Items from a Table section

### Issue Resolutions

- Custom Pie Chart and Custom Gantt Chart do not respond to page level filter default values on page load

# Card Drill Down

## Summary

- Previously, Shibumi provided the Card section to allow quick visual insight into the data within your solutions.
- Users often requested the ability to "drill down" into the Card to understand how the count/attribute summary was derived. E.g., a user might want to know what Initiatives by Workstream are contributing to the net benefit displayed on a Card section.
- Now, a drill down capability is available when using the Card section to help improve your ability to analyze program data.

## Applicable to

- Cards

## Set up

- On a Card section, open the Settings dialog. Note the new Drill Down tab on the dialog.
- Check the Enable Drill Down checkbox to enable/disable drill down.
- Optionally add one or more groupings by selecting an attribute to group by in the drop down. Save.

BENEFIT IN PROGRESS	
Benefit Type	↓ Amount
OpEx	2,585,000
CapEx	410,000
Other	45,000

  

BENEFIT IN PROGRESS · OpEx	
Name	↓ Amount
Data Center Energy Savings	25,000
Wave 1 Release	25,000
Efficiency Savings (Recurring)	20,000
License Savings from System Retirement (Recurring)*	20,000
Recurring Benefit	15,000
On Target Benefit	15,000
Efficiency Benefit	15,000
Efficiency Savings (Recurring)	10,000

25 to 32 of 37 | Page 4 of 5 | Close

## Notes

- The Group By feature shows progressively more granular aggregations of data and ultimately provides users with the ability to easily navigate to the work items that contribute to the value displayed on the Card.

# Display a Value from Associated Items on Cards

## Summary.

- Previously, Card sections could display descendant work item values and counts.
- App Admins asked for the ability to display values / counts from associated work items as well. E.g., Each Workstream in an EPMO Program has child Projects. Each Project provides Anticipated Value. Each Project is associated with an Organizational Goal (which are defined as children of the Program). App Admins would like to see a Card showing the summed Anticipated Value from all Projects associated with the Environmental, Social, and Governance (ESG) Organizational Goal.
- Now, Admins can configure a Card section to show counts or aggregated values from associated work items.

## Applicable to

- Cards, Associations

## Set up

- On a Layout in Design mode, select Add Section and choose Card.
- From the list of available template types, select an association.

Add Section	
View	Activity
List	Activity Dependency
Table	
Export / Import	Association: Initiative - Program
Create Form	Association: RAID Item - Program
Edit Form	Benefit
Rich Text	Cost
Embed	
Image	Funding Request
Board	Individual Resource
Card	Initiative
RPA	Initiative KPI - Number Maximize
Visualizations	Initiative KPI - Number Minimize
	Initiative KPI - Percentage Maximize
	Initiative KPI - Percentage Minimize
<a href="#">Cancel</a>	

## Set up cont.

- Configure the Card to count instances or aggregate a value from the associated items.
- Save.

# Create from a Table

## Summary

- Previously from a table, users could view and edit existing work items but could not create new work items. App Admins add Create Form sections to provide the ability to create.
- Especially when the table section displayed multiple types of work items, the layout became cluttered with the Create Form sections.
- Now, you can create from the Table section and simplify the user experience by removing the Create Form sections.

## Applicable to

- Tables, Create

## Set up

- On a Table, open the Settings dialog. Click the Enable Create Form checkbox. Select a Form option.
- If Default Form is selected, the Create dialog will include the columns displayed in the table. If columns are added or removed from the Table, the Create dialog will auto-update.

The screenshot shows a 'Create Initiative' dialog box with the following fields: Parent Item (Finance), Workstream, Stage (1 - Idea), Name (2023 Taxes), and Cumulative Net Benefit. The dialog also has 'Cancel' and 'Create' buttons. A blue arrow points to a '+' button in the top right corner of the table.

## Set up cont.

- If Custom Form is selected, navigate to the Create Forms tab. Configure the Create Form(s) with the desired fields.
- Save and Publish your changes to the Table. Navigate to the instance and see the '+' on the top right corner of the Table section.

## Notes

- Switching between Custom and Default Forms will erase any Custom Forms upon saving.
- Disabling Create Forms will erase any Custom Forms upon saving.
- Metric columns will not be included in Default Forms because they cannot be added to Forms at this time.
- Non-editable out-of-the-box attributes (i.e. Created, Updated, etc.) will not appear in Default Forms.

# Resolved Issues

Release		#	Issue
194.1	*	9655	Gantt chart labels not responding to background colors
	*	9652	Participant window performance regression
194.2	*	9662	Enterprise homepage auto-assignment can cause failure to assign roles
	*	9657	Chart labels not responding to background colors
195.0	!	9583	Custom Pie Chart and the Custom Gantt Chart do not respond to page-level filter default value on page load