197.1 & 198.0 Release Notes

12 August 2023

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Issue Resolutions

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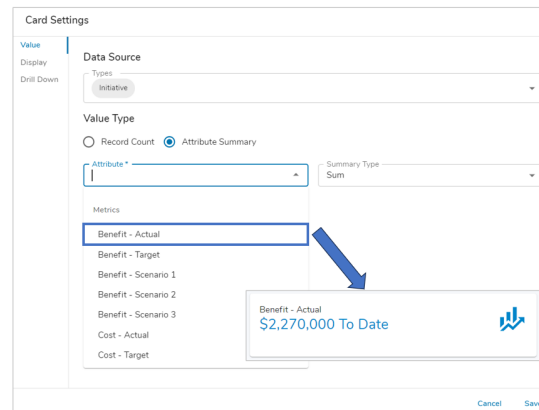# Display Metric Values in Cards

Summary

- Previously, aggregations of numeric attributes and pick list values could be displayed in Card sections.

- App Admins additionally wanted to display metric values within their Card sections since these often represent KPIs for the program. E.g., A Card section could display Total Benefit Delivered. The data set that is displayed in the card (Target or Actual) could be determined by a page level filter. Drill down could be configured on the card to enable the user to investigate which initiatives are contributing towards the displayed value.

- Now, Metric values are available for selection in the Attribute Summary field on Card sections.

Applicable to

- Cards

Set up

- On a Layout in Design mode, select the 'Add Section' button.
- Select Card in the dialog and choose a template type. From Configure mode, open the Card Settings dialog.

Set up cont.

- Toggle the Value Type to 'Attribute Summary'. From the Attribute drop down, choose a Metric. E.g., Net Benefit - Actual, Net Benefit - Target, etc. Note: If a data set filter has been configured on the layout, it will be included in the list of available options.

- A Timeframe Date field will appear with default: today()

- If you want to change the timeframe, use the Shibumi Expression Language to define a date. This setting could also reference a Date filter.

- Save and Publish. For more information please visit Configuring Card Sections – Shibumi Help

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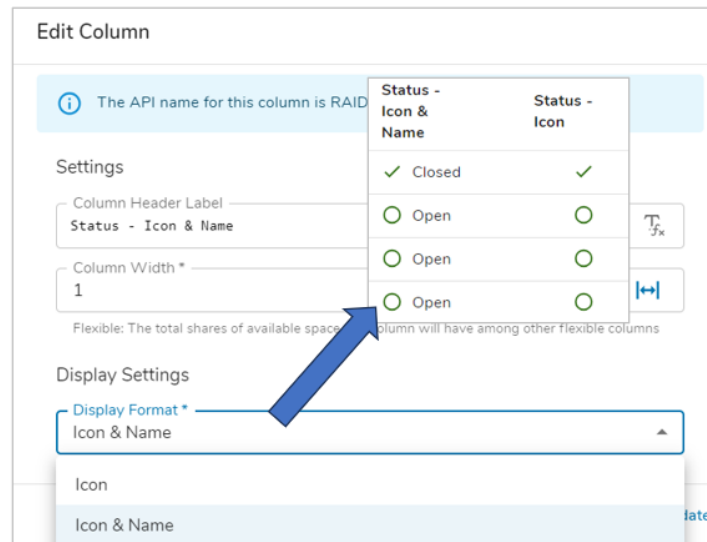# Display Options for Icon/Name Pick Lists in Tables

Summary

- Previously when Icon/Name/Value pick lists were included in Table sections, only the Icon would be displayed in the column.
- It could be difficult, especially for new users, to immediately understand what the icon represented. App Admins wanted the option to annotate the Icon with the Name to ensure the data is easily understood.
- Now, App Admins have the choice of showing the Icon or the Icon & Name when configuring pick list columns in Table sections.

Applicable to

- Tables

Set up

- On a Template in Configure mode, select the Customize option from the gear icon on a Table section.
- Select the Add Columns dialog on the right of the section and choose an Icon/Name/Value pick list attribute from the list.

Set up cont.

- In the column header, open the column options menu and select Configure.
- Within the Edit Column dialog, select the Display Format drop down. Choose Icon (default) or Icon & Name.
- Save and Publish your changes.

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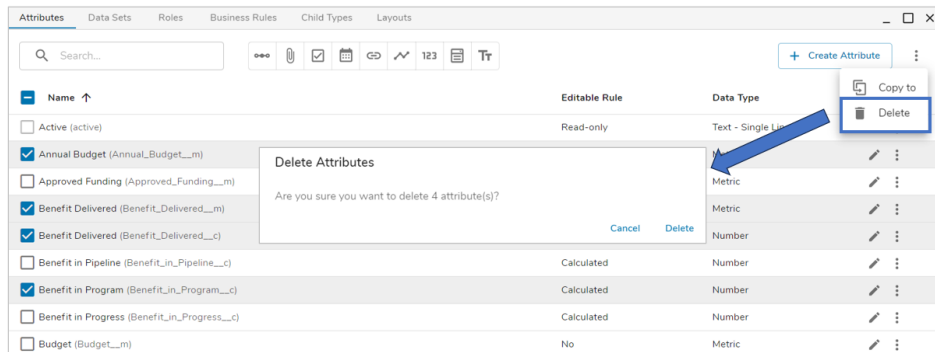# Bulk Delete Attributes and Metrics from Data Panel

Summary

- Previously, attributes and metrics could only be deleted individually from the Data Panel.
- Following the introduction of the ability to bulk copy attributes and metrics to other templates, we are further expanding the bulk action capabilities to simplify App management for Solution Admins.
- Now, Admins can bulk delete attributes and metrics from the template Data Panel.

Applicable to

- Attributes, Metrics, Templates, Data Panel

Set up

- On a Template, open the Data Panel. On the Attributes tab, find the attribute(s)/metric(s) you would like to delete from the template.
- Select the checkbox to the left of the attribute(s)/metric(s) to be deleted.
- Select the More Actions ellipsis at the top right of the Attributes tab and choose the "Delete" option.

Set up cont.

- The Delete Attributes dialog will appear asking for confirmation to delete the selected number of attribute(s)/metric(s). Click Delete. Publish the template.

Notes:

- Out-of-the-box attributes cannot be deleted.

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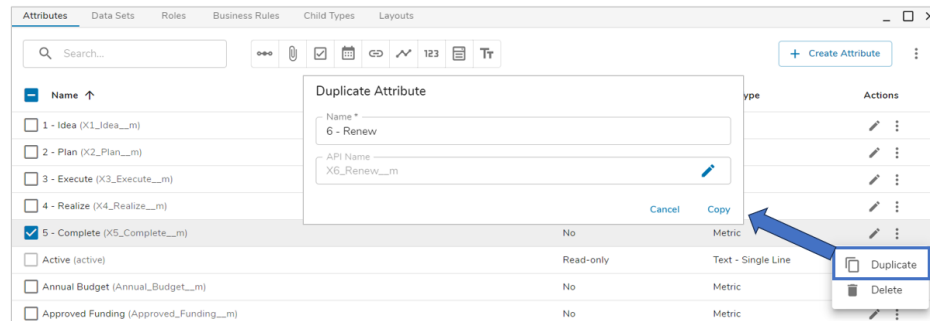# Duplicate an Attribute or Metric on a Template

Summary

- Previously, metrics could be duplicated individually by viewing the metric detail page. Attributes could not be duplicated.
- Admins wanted a simple way to duplicate metrics and attributes to easily create new ones with similar definitions and calculations.
- E.g., On an SPM App, the stage metrics (1-Idea, 2-Plan, 3-Execute, etc.) all shared the same configuration just with different names. Setting these up indiviually is tedious and time-consuming.
- Now, to reduce solution configuration time required by Admins, attributes and metrics can be duplicated from the Data Panel.

Applicable to

- Attributes, Metrics, Templates, Data Panel

Set up

- On a Template, open the Data Panel. On the Attributes tab, find the attribute/metric you would like to duplicate from the template.
- Select the checkbox to the left of the attribute/metric to be duplicated.

Set up cont.

- Select the More Actions ellipsis at the top right of the Attributes tab and choose the Duplicate option.
- The Duplicate Attribute dialog will appear. Enter a new name for the attribute/metric. The API name will automatically populate based off the new name, and can be manually edited. Select 'Copy'.
- The duplicated attribute/metric will now be visibile in the Data Panel.

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Days & Weeks Available as Date Range Filter Options

Summary

- Previously, Date Range page-level filters could be configured to provide short-cut options for Months, Quarters, and Years.
- When clients wanted to filter their solution's sections by more granular date ranges (e.g., show me the milestones due in the next 5 days or next 2 weeks), they had to include the Custom option to let users manually select the dates representing the desired options.
- Now, Admins can configure the Date Range filter to include variations of Days and Weeks.

Applicable to

- Page-level filters

Set up

- On a Template in Design mode, enable the Filter Bar.
- Select the '+' button on the left side of the Filter Bar.
- Choose the Date Range option from the drop-down menu.
- Define a Label for the filter, then select 'Next'.
- On the Add Options step, open the 'Date Range Preset' drop-down.

Set up cont.

- Choose one of the Day or Week options:
  - Last N Days, Yesterday, Today, Tomorrow, Next N Days.
  - Last N Weeks, Last Week, This Week, Next Week, Next N Weeks.
- Optionally define a name for the Date Range Preset.
- Add additional options as desired.
- Save and Publish your changes.

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Reference Data Set Filter Display Name in Expressions

Summary

- Previously, when referencing a Data Set filter via the Shibumi expression language, Admins used an if() statement derive the Data Set name.

- E.g., In order to return the Data Set name via an expression, Admins would have to write something along the lines of:

  {!if(Data_Set__f="actual__d", "Actual",
  if(Data_Set__f="target__d", "Target",
  if(Data_Set__f="Forecast__d", "Forecast", "Actual")))}

- Admins wanted an easier way to reference the name of the data set that was selected in the page-level filter.

- Now, Admins can simply enter the expression: {!Data_Set__display__f} to display the Data Set name via an expression.

Applicable to

- Data Set Filter, Expressions

Set up

- On a Template in Design mode, enable the Filter Bar. Add a Data Set filter.

- Define a Label for the Data Set filter. The Display Name will be derived based on the Label input. Optionally, edit the name.

- Open the Settings dialog of a section where you would like the Data Set name to be dynamically displayed.

- Input the {!Data_Set__display__f} reference in the expression field. Save.

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Resolved Issues

Release		#	Issue
197.1	*	9771	Card Section not filtering correctly by name/value pick list options
198.0	*	9787	Metric View with 365 columns no longer loads quickly
	*	9783	Participant view: Unable to sort by 'Updated' sort criterion with the 'All' filter selected
	*	9778	Preview Pane remains open when child item selected from Table
	*	8767	Section titles disappear on templates when they contain injected expressions that resolve to empty

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