

200.1-6 & 201.0 Release Notes

23 September 2023

200.1-6 Contents

Issue Resolutions

- SSO metadata file configurations that failed to load for a specific enterprise could impact the loading of valid SSO configurations for other enterprises
- Service Account users not properly bypassing the SSO Required login rules
- Can't evaluate metric editability rules with only a date condition
- Lists and Views configured for template types using filters that don't exist for one (or more) of the templates causes the layout to fail to load
- Pick List won't accept blank values in GraphQL
- Performance regression evaluating expressions during export

201.0 Contents

Enhancements

- Allow Date Range page filter to only have a custom range
- Allow multiple options to be selected in Date Range page filter
- App Validation: Data Panel & Tab Visibility
- Allow Delete from Table section
- Allow Calculations & Editability Rules to be added on create of a Metric
- When multiple data sources are included for a custom Chart, combine y-axis series when the names match
- Ability to Show/Hide icons on the Workplan Gantt
- Ability to disable the legend in Custom Chart sections

Issue Resolutions

- Role fields in Create Forms are no longer editable
- Role columns do not appear in the default Table edit form
- Send Notification business rule action doesn't show all enabled roles in dropdown
- Gantt markers overlap when close together
- Error loading layout can sometimes result from clicking forward / backward in browser
- Cannot delete replies in discussions
- Workplan Gantt chart is not properly handling data sets when creating child items
- GraphQL query fails if attribute's trailing '___C' is capitalized

Date Range Page Filter Enhancements

Summary

- Previously, Date Range page filters gave users a single-select pick list to choose from that could be comprised of both pre-set options and a custom date range.
- Many clients expressed the need for additional flexibility for the filter's options, including selecting a rolling date range or only a custom option.
- Now, Date Range page filters provide the ability to select multiple pre-set options and allows App Admins to configure the filter to only display a custom range.

Applicable to

- Date Range Page Filter

Set up

- On a Date Range page filter, open the Edit dialog. Select the "Allow Multiple Selections" checkbox to enable multi-select on the filter's pick list drop-down menu.
- Alternatively, on the Add Options step, enable Custom Date Range but leave the preset options empty to filter by only a Custom Range.

The screenshot displays the 'Add Date Range Filter' configuration interface. On the left, the 'Add Options' step is active, showing a 'Definition' section with 'Date Range' as the label. Below this, there are fields for 'Start API Name' (Date_Range_start_f) and 'End API Name' (Date_Range_end_f). A checkbox for 'Allow Multiple Selections' is checked, and a 'Required' checkbox is unchecked. On the right, a calendar for September 2023 is shown with the date range 7/1/23 to 12/31/23. The calendar has a 'Custom' dropdown menu with 'This Month', 'Next Month', 'This Quarter', and 'Next Quarter' options. 'This Quarter' and 'Next Quarter' are selected with checkboxes. Below the calendar, there is a '+ Add Option' button and a checkbox for 'Allow Custom Date Range' which is checked. A 'Default Option' dropdown menu is also visible. At the bottom right, there are 'Previous' and 'Save' buttons.

Set up cont.

- Save and Publish any changes made to the Date Range filter.
- Note: Multi-select functionality will grey-out any non-contiguous options when a date range is selected. e.g., If Next Month is selected, options like Last Month or Today could not be selected as they do not result in a continuous date range.

App Validation: Data Panel & Tab Visibility

Summary

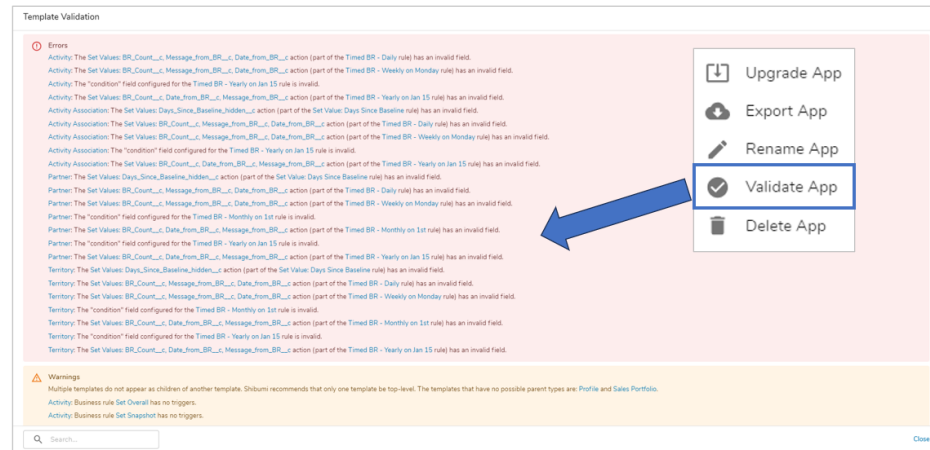
- In the past, error tracking within Shibumi solutions required navigation through every configuration dialog. Additionally, there was no way to view warnings about your solution configuration.
- This lack of automated app introspection made it very challenging for App Admins to avoid issues within their solutions.
- Now, App Admins can utilize the App Validation feature to view errors and warnings about expressions defined in sections of the Data Panel or in Tab Visibility expressions.

Applicable to

- Apps, Templates, Data Panel, Tabs

Set up

- As an App Admin, navigate to the Apps page and select the App you would like to Validate.
- From the chosen App Details page, select the Validate App option from the Actions menu.



Set up cont.

- The Template Validation dialog will appear on the screen. From here, the errors and warnings will be separated by colored sections.
- Clicking on one of the hyperlinked options will take you directly to the configuration dialog where the error/warning is present.

Delete from a Table Section

Summary

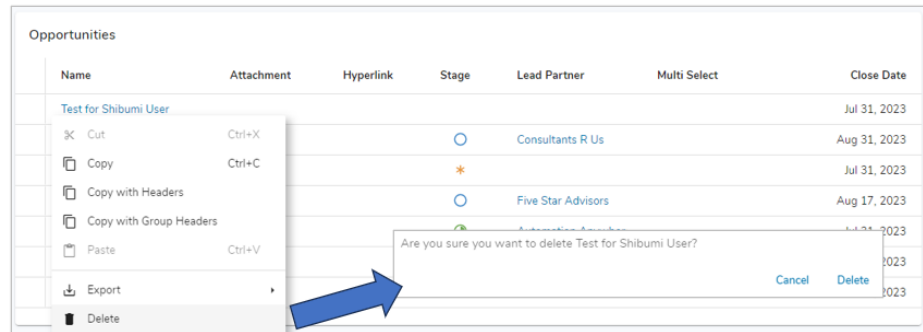
- Previously, when viewing work items in a Table section, if you wanted to delete a work item, you navigated to it and selected Delete from the Action menu.
- Program Admins wanted a more efficient approach to deleting work items.
- Now, rather than navigating to the work item, you can delete directly from a Table.

Applicable to

- Tables

Set up

- On a Table section, right-click on a work item and select the 'Delete' option from the drop-down menu.
- A dialog will appear asking you to confirm the deletion of the work item, select 'Delete' to delete the chosen work item.



Additional notes

- Standard permissions checks will apply upon selecting the Delete option. If users do not have permissions to delete, they will see an error upon delete.

Add Calculations & Editability Rules on Metric Creation

Summary

- Previously, App Admins created new metrics and then opened the Settings dialog for the newly created metric to define calculations and/or editability rules for the available data sets.
- Especially when creating multiple metrics for the solution, this two-step process could be tedious.
- Now, calculations and editability rules can be added to a metric within the Create dialog, providing a more streamlined and efficient process for metric creation.

Applicable to

- Metrics

Set up

- On a Data Panel, select the Metric option from the Create Attribute drop down.
- Define the Name, Unit of Measure, Period of Measure and Target Direction for the Metric. Select 'Next'.

The screenshot shows the 'Create New Metric' dialog with the 'Calculation / Editable Rules' section expanded. The dialog is divided into two main sections: 'Definition' and 'Calculation / Editable Rules'. The 'Definition' section includes fields for Name, Metric, API Name, Metric ID, Unit of Measure (Number), Period of Measure (per Month), and Target Direction (Maximize). The 'Calculation / Editable Rules' section contains a table with columns for the metric name and its editability. The 'Actual (actual__d)' row is expanded to show a 'Calculated' rule type and an 'Expression' field with a formula icon. Other rows for 'Target (target__d)', 'Forecast (forecast__d)', 'Best Case (best_case__d)', and 'Worst Case (worst_case__d)' are listed with 'Always Editable' rules. At the bottom right, there are 'Previous' and 'Create' buttons.

Metric Name	Rule Type
Actual (actual__d)	Calculated
Target (target__d)	Always Editable
Forecast (forecast__d)	Always Editable
Best Case (best_case__d)	Always Editable
Worst Case (worst_case__d)	Always Editable

Set up cont.

- Each of the metric data sets can be opened accordion-style by selecting the drop-down arrow.
- Define the Calculation / Editable Rule and the accompanying Expression for each data set.
- Select 'Create' to create the new Metric.

Combine y-axis series when the names match for Charts

Summary

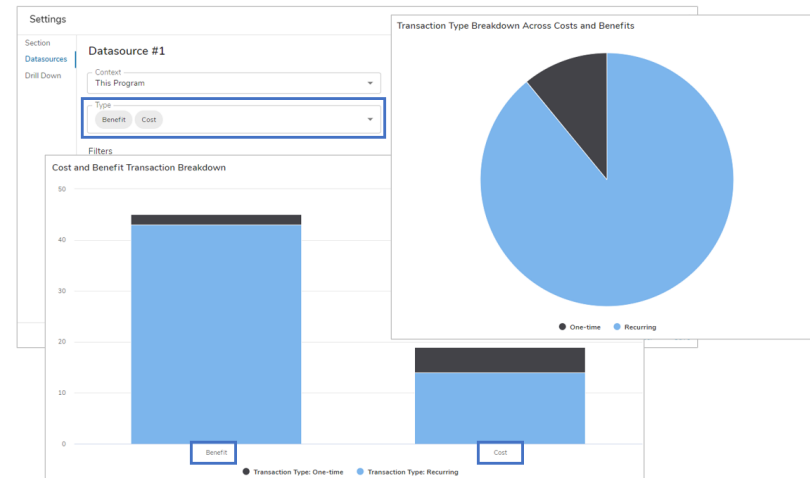
- Previously, App Admins could define multiple templates in custom Chart sections, but they would be grouped individually even if they had matching attributes that were being displayed.
- When App Admins configure a Chart to include multiple templates and then group based on an attribute that the templates all have, they expect to see the data combined and displayed holistically rather than as separate data series. E.g., Recurring Costs and Benefits are two separate data series (columns) in the displayed stacked bar chart, rather than being consolidated to form a single data series.
- Now, the custom Chart sections will combine the data from the included templates before processing it for display in the chart (e.g., the Pie Chart shows the consolidated data).

Applicable to

- Custom Sections: Chart, Workplan Gantt, Gantt, Pie Chart

Set up

- On a Custom Section, open the Settings dialog.



Set up cont.

- On the Datasources tab of the Settings dialog, add a datasource.
- Define multiple templates under the Type drop down.
- In the Y-Axis section, make sure that the attribute value you select is shared between the templates defined in the Type, otherwise nothing will load for the section.
- Save and Publish.

Hide Icons on Workplan Gantt/Disable Legend on Charts

Summary

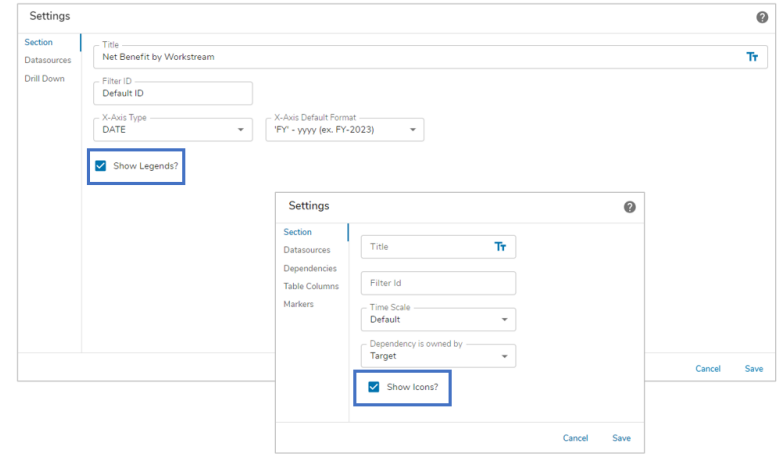
- Previously, Chart sections included a legend and Workplan Gantt sections included icons representing the hierarchy levels.
- Certain clients have expressed the need to disable these elements according to their user experience preferences.
- Now, the Icons within the Workplan Gantt and the Legend on Custom Chart sections can be disabled.

Applicable to

- Workplan Gantt, Chart, Pie Chart

Set up: Workplan Gantt Icons

- Open the Workplan Gantt Settings dialog by selecting the gear icon in the top right corner of the section.
- On the Section tab of the Workplan Gantt Settings dialog, select the 'Show Icons?' checkbox to enable or disable the Icons. Save.



Set up: Chart Legends

- Open the Chart/Pie Chart Settings dialog by selecting the gear icon in the top right corner of the section.
- On the Section tab of the Chart/Pie Chart Settings dialog, select the 'Show Legends?' checkbox to enable or disable the Legend on the section. Save.

Resolved Issues

Release		#	Issue
200.1	*	9892	SSO metadata file configurations that failed to load for a specific enterprise could impact the loading of valid SSO configurations for other enterprises
200.2	*	9893	Service Account users are not properly bypassing the SSO Required login rules
200.3	*	9894	Can't evaluate metric editability rules with only a date condition
	*	9890	Lists and Views configured for template types using filters that don't exist for one (or more) of the templates causes the layout to fail to load
200.4	*	9897	Pick List won't accept blank values in GraphQL
200.6	*	9904	Performance regression evaluating expressions during exports

Resolved Issues

Release		#	Issue
201.0	*	9920	GraphQL query fails if attribute's trailing '___C' is capitalized
	*	9915	Workplan Gantt chart is not properly handling data sets when creating new child items
	*	9909	Role fields in Create Forms are no longer editable
	*	9902	Role columns do not appear in default Table forms
	*	9780	Send Notification business rule action doesn't show all enabled roles in dropdown
	!	9838	Gantt Markers overlap when close together
	!	9760	Error loading layout can sometimes result from clicking forward / backward in browser
	!	9361	Cannot delete replies in discussions