209.1 & 210.0 Release Notes

24 February 2024

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- Data set page filter on dashboard breaks Tables when tied to metric column with conditional formatting

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Issue Resolutions

- Metric View Settings Dialog: Data sets list gets stuck
- Intermittently seeing the login screen in external views
- Display a B for Billions on items using Highcharts
- Very long user names in Enterprise Admin user list aren't truncated

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Ancestor Columns in Export/Import

Summary

- Previously, Program Admins used the Import/Export sections to upload program data into their solutions.

- If a solution included work items with names that are not unique (e.g., each Project includes a Finance Committee Approval milestone with the same set of activities included under it), when attempting to load the data, Shibumi presented duplicate name error messages and was unable to complete the import.

- Now, Import/Export sections can be configured to include ancestor columns to fully qualify the branch where the item will be created.

Applicable to

- Export/Import Section

Set up

- While in Configure mode on a Layout that has an Import/Export section, open the Settings dialog. There's a new Hierarchy Columns section where you can add ancestor columns to be included in the Export file.

- Select the blue '+' in the Hierarchy Columns section.

Set up cont.

- Starting with the Parent column, choose a template option from the dropdown.

- With the Parent defined, selecting the '+' again will add another Ancestor column with options representing templates hierarchically above the Parent template.

- Continue this for as many ancestors as are needed to ensure a unique work item. Save.

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Association Filter Context on Import
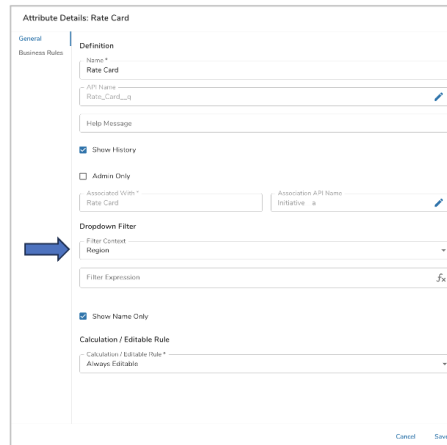
Summary

- When configuring an Association, App Admins can select a Filter Context for the association. This scopes the available association options based on the filter logic (e.g., only show items that share a common ancestor with the current item).

- Previously, the Filter Context was ignored when Importing via an Export/Import section resulting in import errors when an association items name is not unique throughout the program.

- Now, the Association Filter Context is used on file Import to scope the options that can be imported as an association and to prevent duplicate name errors.

Applicable to

- Export/Import Section, Associations

Set up

- Within the Settings dialog of an Association, define the Filter Context.

- If a template ancestor is selected as the filter context, the ancestor instance will be applied to scope the available options.

Set up, continued

- If another association is selected as the filter context, once a selection is made for the first association, the options for the current association will be filtered accordingly.

- When the Filter Context is specified, the Export/Import section will automatically reference it to assist with assigning the correct work item as an association.

- Note: on Import, Shibumi applies the Filter Context but will not validate the imported data against the Filter Expression.

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Guest User Accounts

Summary

- Previously, all users, regardless of role(s) held, could view the Participant Window to see the other users that had access to the current work item.

- In some situations, the ability to see the other users violated security requirements. E.g., A government agency has invited citizens into projects to be Subject Matter Experts. These citizens should not be able to see the government agency roster nor which other citizens are participating in the projects. App Admins needed the ability to hide the Participant Window from these users.

- Now, External Users can be assigned the 'Guest' user flag preventing them from seeing any other Participants in the enterprise.

Applicable to

- Enterprise Administration, Participant Window

Set up

- As an Enterprise Administrator, navigate to the External Users tab within Enterprise Administration.

- Select a user and choose the 'Make Guest' option from the Actions menu. The user account will now have the 'Guest' tag assigned to it.
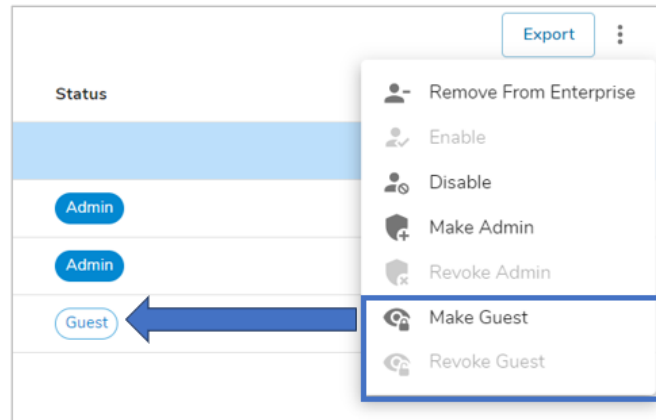
Notes

- On the Enterprise Admin Security tab, there is a checkbox to enable always defaulting new external users to be Guests. (Disabled by default)

- Guest users cannot see the Participant Window regardless of role held on a work item.

- If role fields or columns are included in tables, forms, lists, or views, Guest users will see the people holding the roles but will not be able to modify them.

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Resolved Issues

Release		#	Issue
209.1	*	10204	Data set page filter on dashboard breaks Tables when tied to metric column with conditional formatting
210.0	*	10190	Display a B for Billions on items using Highcharts
	*	10134	Metric View Settings Dialog: Data sets list gets stuck
	*	10129	Intermittently seeing the login screen in external views
	!	10166	Very long user names in Enterprise Admin user list aren't truncated

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