211.1-3 & 212.0 Release Notes

20 April 2024

211.1-3 Contents

Issue Resolutions

- Can't add new On Date business rule triggers
- Custom chart section crashes when Monthly option is selected
- Injected expressions with "user." should resolve for Guest users
- Pages not loading if the browser's default character set isn't UTF-8
- Table Section controls stay floating after exiting customize mode

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212.0 Contents

Enhancements

- Accessibility: Improve Navigation Sidebar accessibility
- AI Analyze: Configure which template is used
- App Admin: Display metric period of measure on the Data Panel
- App Admin: Navigate to same layout when opening template
- Business Rules: Assign roles on associated work items
- Business Rules: Send notifications to roles on associated items
- Card: Calculated Values
- Guest Users: Tag Internal Users as Guests
- Metric Timeframe Chart: Column, Line, Stacked Column, Combination Column & Line
- Shibumi Support Page: Instrumentation
- Shibumi Support Page: Attribute Usage
- Table Create Form: Multi-line Instruction fields

Issue Resolutions

- Cannot reference a calculated date attribute as a value for timePeriod in a Business Rule Set Value action
- Edit Form menu moves to the top left of the page
- Emails not summarized when adding user to multiple items if user not yet activated
- Sections are getting stuck in "drag" mode on Dashboards
- Table Bulk Edit column widths do not respect table configuration

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Metric Timeframe Chart

Summary

- Previously, to display a chart of Metric Timeframe data, App Admins used a Metric List/View then toggled into a chart mode, or they used a custom Chart Section that needed to be registered in the App.

- App Admins wanted an easy-to-configure Chart capability that could dynamically respond to Page Filters.

- Now, the Metric Timeframe Chart section is available.

Applicable to

- Metrics, Charts

Set up

- On a Layout, open the Add Section dialog and select Chart from the left panel. Click on the Metric option under the Timeframe category.

- Open the settings dialog. On the Data tab, configure the X-axis Frequency and Timeframe. Select Custom to use expressions to define the timeframe or select a data range page filter.

- Define the Datasource: the template where the metrics are defined and add any desired Filters (these can reference page filters).

Set up cont.

- On the Display tab of the settings dialog, choose the Chart Type. This will dictate which Value options are available. Select which Metrics to display and how to aggregate each. For Stacked Charts, select the grouping method (Metric Name, Item Name, Associations or Pick Lists). Format the values by applying unique labels and colors to each.

- Finally, under the Options section, determine whether the chart will display a legend and/or show values. Save.

- For more information, visit our Configuring Charts Article.

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Card: Calculated Values

Summary

- Previously, Card sections could display an aggregated value from child work items, a count of child work items, or a value from the current work item.

- App Admins often wanted to display a calculated value on the Card and could only do that by defining the calculated value on the current work item. The disadvantage to that approach was that the value could not react to page filters.

- Now, App Admins can configure a calculated value on the Card and it can be configured to react to the page filters.

Applicable to

- Cards

Set up

- On a Card section, configure two Values with the Type: Attribute, Attribute Aggregation, or Record Count. Include appropriate filters.

- On a third Value, select the Operation option as the Value Type.

- Select a previously configured value in the First Value field. For the Operator, select from: (+, -, x, /).

Set up cont.

- In the Second Value field, select another previously configured value.

- Define the Result Type: Number, Percentage, or Currency. Selecting 'Currency' provides an additional drop down for the currency type.

- Configure the Card's Display options. Save and Publish.

- Note: *Operation Values can be included as the main display value or as Captions, however they cannot be selected for Drill Down.*

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Business Rule Enhancements

Summary

- Previously, the Assign Role business rule action could only assign roles on the current or ancestor work items. Similarly, the Send Notification action could only send notifications to users holding roles on the current or ancestor work items.

- App Admins wanted the ability to easily perform both actions on roles from associated work items, rather than needing to configure a series of rules or use a script.

- Now, Business Rules can both send notifications and assign roles on associated work items.

Applicable to

- Associations, Business Rules

Set up: Assign Role

- Open the Data Panel and go to the Business Rules tab. Configure a Business Rule and add an Assign Role action.

- In the 'Where' drop down, choose an association. Select which Role and whether you are adding or removing existing users. Configure one or more expressions to define which users you are targeting.

Set up: Send Notification

- Open the Data Panel and go to the Business Rules tab. Configure a Business Rule and add a Send Notification action.

- From the 'Role Context' drop down, select an association. Choose the Role that the notification should be sent to.

- Add the notification details (e.g., Subject, Body, Link information).

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AI Analyze: Template

Summary

- Previously, AI Analyze was available to provide insights about your the values, risks, timelines, etc. of the initiatives in your program.
- A prerequisite of AI Analyze was that the solution required an Initiative (Initiative__t) template defined with AI Analyze Score attributes.
- Now, AI Analyze can be used in any program. I.e., the solution does not need to have an Initiative__t template. When activating AI Analyze, the App Admin can specify which template to use.

Applicable to

- Shibumi AI Analyze

Set up

- Please contact your Shibumi Account Team to request activation of Shibumi AI.
- In your request, please provide the template name, template API name, and App ID to ensure proper configuration.
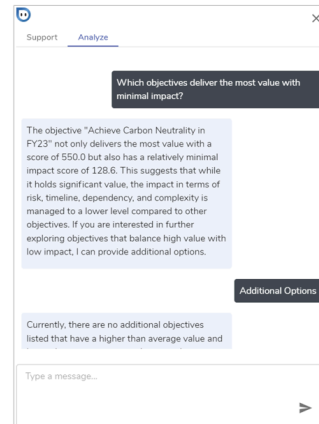
Notes

- AI Analyze still requires that the Score attributes exist on the template. Your account team can help you configure these Scores.
- AI Analyze can be found on all pages within the solution and will keep a history of previous chat logs for easy reference.
- The chatbot follows our security model and will never reply with information that a user doesn't already have access to.
- Proper configuration of the expression that generates the value stored in each Score is critical for the Analyze function.
- If any of the prerequisite attributes are missing from the solution, AI Analyze will not be available.

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Support Page: Instrumentation

Summary

- Previously, there was limited tooling to help troubleshoot solution issues.
- Often, the Shibumi Tier 3 Support team had to carefully review transaction logs to diagnose issues.
- Now, Shibumi team members can use the Instrumentation Support Page to review each transaction that is initiated with a change made by a user.

Applicable to

- Admin Support Console (only available to Shibumi employees that are Enterprise Admins)

Set up

- From the Admin Support Console, click on Instrumentation.
- Select the 'Enable' button in the top left section to start tracking. Make manual changes in the solution. Return to the Support page to Disable the session.

Instrumentation Page

Created At	Work Item	Attribute	Business Rule Name	Business Rule Action	Transaction ID
3/21/2024, 5:36:36 PM	Deploy New Finance system	workflow_action__c			5048a8ac-0385-4d09-82a8-1ad3b95df9...
3/21/2024, 5:36:37 PM	Deploy New Finance system		Workflow - Move Back	Set Values: Stage__c, Wo...	5048a8ac-0385-4d09-82a8-1ad3b95df9...
3/21/2024, 5:36:38 PM	Deploy New Finance system	stage__c			5048a8ac-0385-4d09-82a8-1ad3b95df9...
3/21/2024, 5:36:38 PM	Deploy New Finance system	workflow_action__c			5048a8ac-0385-4d09-82a8-1ad3b95df9...
3/21/2024, 5:36:38 PM	Deploy New Finance system	stage_display__c			5048a8ac-0385-4d09-82a8-1ad3b95df9...
3/21/2024, 5:36:38 PM	Release 2	initiative_stage__c			5048a8ac-0385-4d09-82a8-1ad3b95df9...
3/21/2024, 5:36:38 PM	Release 1	initiative_stage__c			5048a8ac-0385-4d09-82a8-1ad3b95df9...
3/21/2024, 5:36:38 PM	Project Manager for Deploy New Finance system	stage__c			5048a8ac-0385-4d09-82a8-1ad3b95df9...

Set up, cont.

- Choose from one of the available Sessions from the respective drop down menu. The sessions will be marked by the date and time, as well as the number of updates triggered during the session.
- Session data will only be collected when tracking has been enabled. Tracking will be automatically disabled after 5 minutes.

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Support Page: Attribute Usage

Summary

- Previously, when App Admins wanted to understand which attributes on a template were being used and which were not, they would create a top level dashboard including a View or Table section. Each template attribute would be added as a column. Admins could then review the content to identify which columns had values.
- This was a tedious, prone to human error, process.
- Now, the Attribute Usage Support Page allows Shibumi Admins to see the count and percentage of attributes holding values on instances for each template in a solution.

Applicable to

- Admin Support Console (only available to Shibumi employees that are Enterprise Admins)

Set up

- From the Admin Support Console, select Attribute Usage.
- Choose a template from the drop down menu.

Attribute Usage

ⓘ Choose a template, and find rarely-used attributes for that template. Checks manual entry attributes that don't have datasets enabled. Does not yet support metrics or associations.

Template
Sales App - Opportunity

Instances: 21

Attribute Name 2 ↑	Attribute API Name	1 ↑ Non Empty Count	Non Empty %
Anticipated Value	Anticipated_Value__c	0	0%
attachment	attachment__c	0	0%
hyperlink	hyperlink__c	0	0%
Implementation Date	Implementation_Date__c	0	0%
Percent Custom 2	Percent_Custom_2__c	0	0%
Close Date	Close_Date__c	9	43%
Stage	Stage__c	10	48%
ARR	ARR__c	11	52%
Percent Custom	Percent_Custom__c	11	52%
Checkbox	Checkbox__c	21	100%

Notes

- The number of instances for the chosen template are displayed underneath the drop down.
- The results list shows all editable Attributes including the API name, the count and percentage of instances where the attribute is empty.
- At this time, the Attribute Usage Support Page does not include metrics, associations, or attributes with data sets enabled.

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