214.0 Release Notes

15 June 2024

Contents

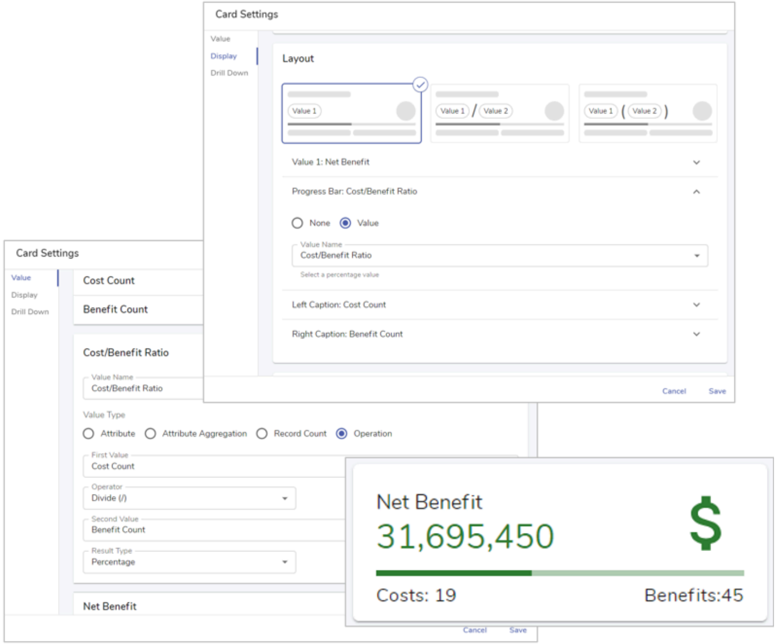
Enhancements

- Attributes: Data Panel Attributes list includes "Admin Only" column
- Business Rules: Copy a Business Rule
- Card: Progress Bar
- Card: Display Left Card Caption across Card width when no Right Caption used
- Chart: Waterfall Timeframe Chart
- Chart: Display data from multiple templates on Metric Timeframe Charts
- Chart: Include Empty values in Stacked Chart sliced by Association
- Chart: Hide selected Pick List options in Stacked Charts
- Chart: Slice Stacked Chart by Checkbox attribute
- Expressions: Allow parent and parentOfParent in Calculated Attribute and Metric Data Set expressions
- Table: Metric Timeframe Column

Issue Resolutions

- Searching for a Role with a "D" at the beginning closes the Enable Role dialog
- Form field input loses focus when mousing over menus in Sidebar
- Export/Import section: Unable to import excel file with Start Date or Due Date
- Date Range page filter "Allow Multiple Selections" setting not being exported in App export
- Remove formatting of text when pasting into a Rich Text Field
- User doesn't see warning message when Timeframe Date field is empty in Metric table columns
- Visibility Field condition lag on Table Create Form

Card: Progress Bar



Summary

- Previously, Card sections had the ability to display values, text captions/labels, and an icon.
- While the succinct display of this information on the Card is valuable, Program Admins also wanted to provide context with a representation of achievement against a target.
- Now, Admins can optionally include a Progress Bar on the Card section to visually depict percentage achieved against a target.

Applicable to

- Cards

Set up

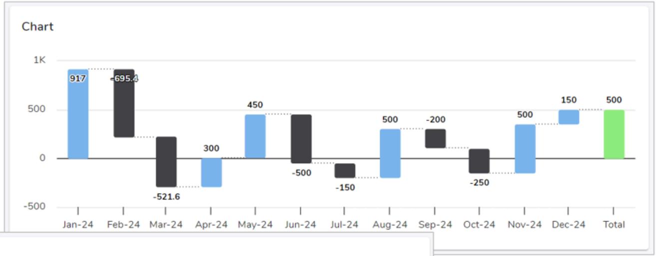
- In Configure mode on a Layout, open the Settings dialog for a Card section.
- Configure one or more Values on the Value Tab of the dialog.
- On the Display Tab, select the Layout.
- Open the Progress Bar section and select Value.

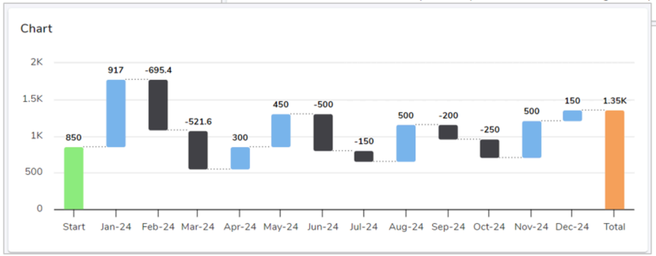
Set up cont.

- From the Value Name dropdown, select one of the previously configured Values.
  Note: Only Values which result in a percentage will be available for selection in the dropdown.
- Finish configuring the Card as desired, Save and Publish.

shibumi

Waterfall Timeframe Chart





Summary

- Previously, Shibumi provided the ability to display a variety of charts showing Metric Timeframe data (e.g., line, column, stacked column, etc.).
- App Admins expressed a need for a similar chart that could display how an initial value is incrementally affected by a series of positive and negative changes over time.
- Now, the Waterfall Timeframe Chart section is available.

Applicable to

- Charts

Set up

- On a Layout, open the Add Section dialog and select Chart from the left panel. Click the Waterfall 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 Date Range page filter.
- Define the Datasource and add any desired Filters.

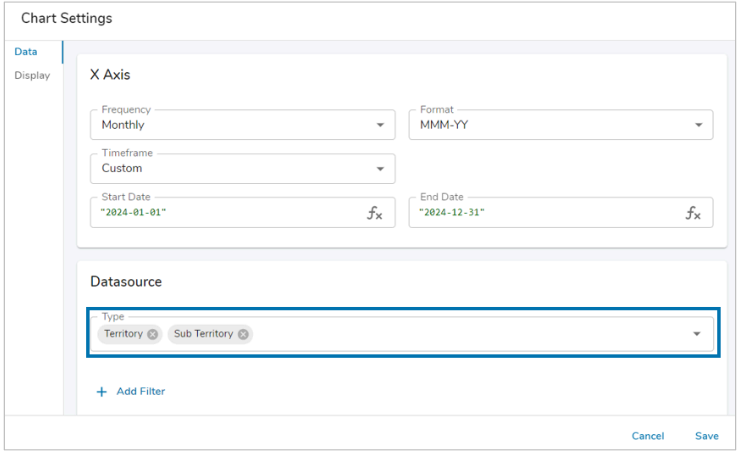
Set up cont.

- On the Display tab of the settings dialog, choose the Chart Type. This will dictate which Columns are available. Select which Metric and data set to display. Optionally, format the positive/negative values by defining unique labels and colors.
- Format the Column Labels and colors as desired. The 'Start to End' type will have columns for the Start and End/Total values, while the 'Net Change' type will only have an End/Total Column.
- Under the Options section, determine whether the chart will display values. Save and Publish. For more information, please review the Waterfall Charts support site article.

Metric Chart: Display Data from Multiple Templates

Summary

- Previously, we introduced the Metric Timeframe Chart section, a performant, easy-to-configure chart designed to dynamically respond to Page Filters and to display metric data over time.
- Metric Timeframe Charts were limited to displaying instances of only one template type. Some solutions include multiple templates (e.g., an Agile Project template, a Waterfall Project template) and require aggregation of the same metric (e.g., OpEx) from these templates.
- Now, App Admins can configure Metric Timeframe Charts to retrieve metric values from multiple templates.



Applicable to

- Metric Timeframe Charts

Set up

- In Configure mode on a Layout, open the Metric Timeframe Chart settings dialog. In the Type dropdown under Datasources, select one or more template type to display.
- On the Display tab of the settings dialog, choose the Chart Type.

Set up cont.

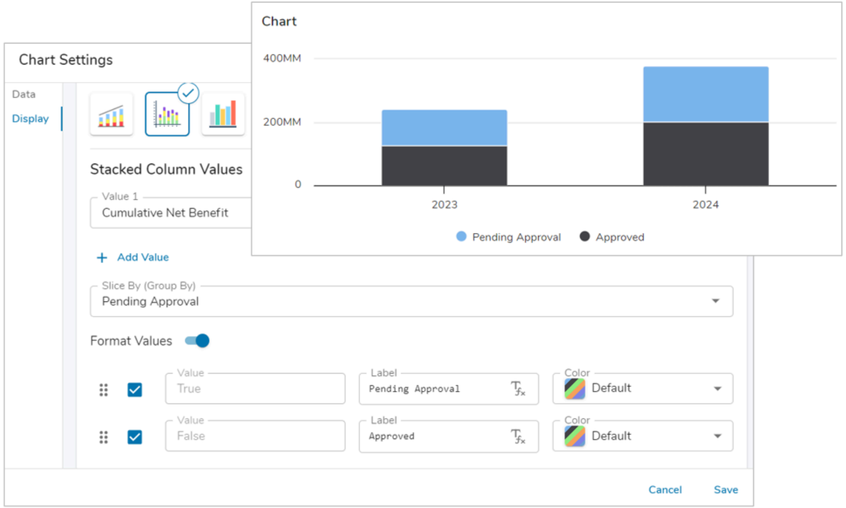
- Select which Metrics to display and how to aggregate each. Only Metrics present on **all** selected template types will be available.
- Format the values by applying unique labels and colors to each.
- Finally, under the Options section, determine whether the chart will display a legend and/or show values. Save.
- For more information, visit our Metric Timeframe Chart Article.

shibumi

Chart: Stacked Chart Slice By Checkbox Attribute

Summary

- Previously, App Admins could configure a Stacked Metric Timeframe Chart to slice the data being presented based on the Item Name, Metric Name, Association, or Pick List.
- We wanted to ensure that the Stacked Chart types were as configurable as possible, utilizing more available data types.
- Now, App Admins configuring Metric Timeframe Charts with the Stacked Chart type can also slice by a Checkbox attribute.



Applicable to

- Metric Timeframe Chart, Stacked Chart Type, Checkbox

Set up

- Open the Chart 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 Date Range page filter.
- Define the Datasource and add any desired Filters.

Set up cont.

- On the Display tab of the settings dialog, choose either Stacked Column or Stacked Column & Line as a Chart Type. Select which Metrics & data sets to display.
- In the Slice By dropdown, select a Checkbox attribute. Enable the toggle to format the values, applying unique labels and colors to each. Save and Publish.

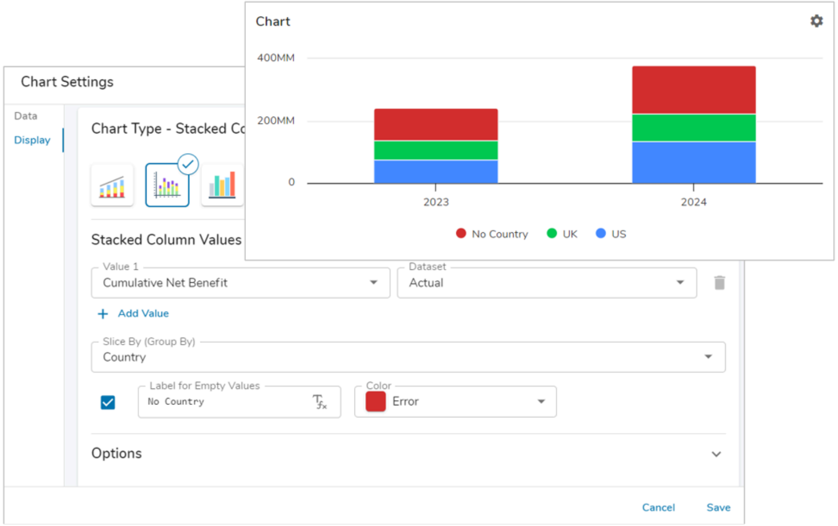
Chart: Show Empty values when sliced by Association

Summary

- Previously, App Admins could configure a Stacked Metric Timeframe charts sliced by Association.
- If a work item did not have a value set for the Association, it was not displayed in the Metric Timeframe Chart.
- E.g., an Initiative does not require the Country Association to be entered until it reaches Stage 3. An Executive Dashboard has a Metric Timeframe Chart displaying the Cumulative Benefit for Initiatives, sliced by the Country Association. Therefore, any Initiatives that do not yet have the Country Association filled out will not be displayed in the Metric Timeframe Chart.
- Now, App Admins configuring a Stacked Metric Timeframe Chart sliced by an Association attribute can include work items that have empty Association values.

Applicable to

- Metric Timeframe Chart, Stacked Chart Type, Associations



Set up

- Open the settings dialog of a Metric Timeframe Chart displaying a Stacked Column or Stacked Column & Line. Go to the Display tab.
- Select an Association to Slice By. Enable the checkbox below to include Empty Values in the chart and assign them a label and color. Save and Publish.

Chart: Hide Pick List options from Chart/Chart Legend

Summary

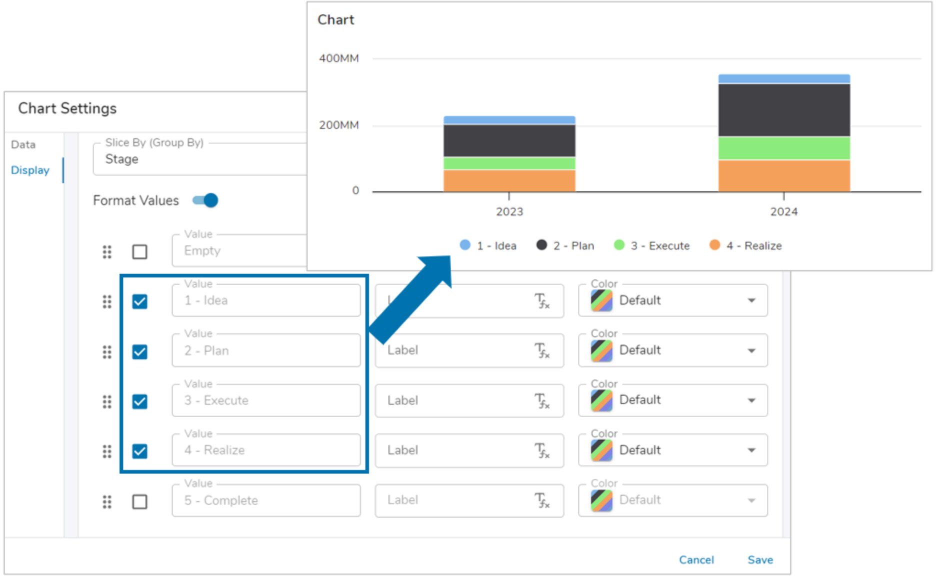
- Previously, App Admins could configure a Stacked Metric Timeframe Chart sliced by a Pick List value. All options available on the Pick List options appeared in the chart.
- App Admins requested the ability to selectively hide Pick List options from the chart, e.g., they wanted to exclude canceled or on hold projects.
- Now, App Admins configuring Stacked Metric Timeframe Charts can select which Pick List options to include.

Applicable to

- Metric Timeframe Chart, Stacked Chart Type, Pick Lists

Set up

- Open the settings dialog of a Stacked Metric Timeframe Chart.
- On the Display tab, click on the Format Values toggle to enable individual formatting.
- Deselect the checkbox to the left of a Value to hide it from displaying in the Chart/Chart Legend. Save and Publish.



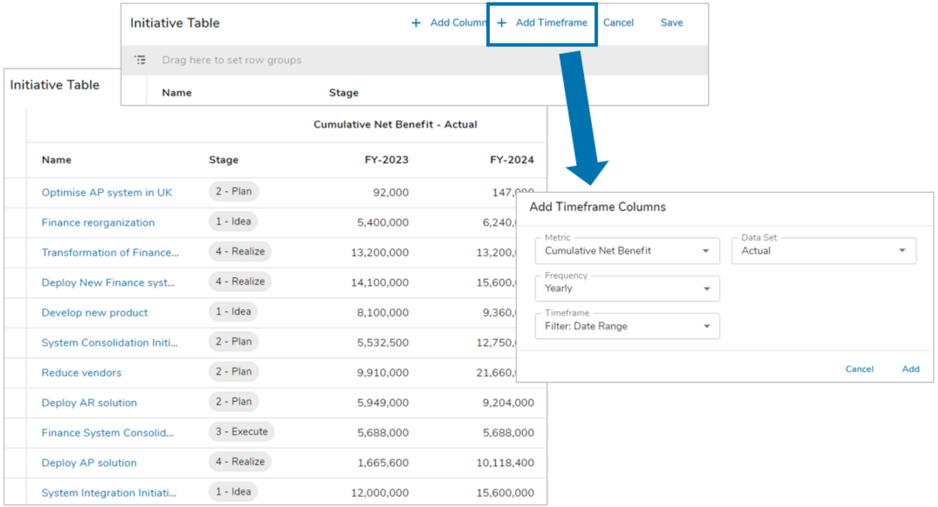
Notes

- Pick List options can be reordered by clicking and dragging on the grabber icon.

Table: Metric Timeframe Columns

Summary

- Previously, App Admins could configure Metric List/View sections with a Metric Timeframe to show metric data over a period of time.
- Table sections could only display metric columns mapped to a single time period. This made adding a timeframe (i.e., multiple time periods) very tedious.
- Now, Metric Timeframe columns can be added to Tables, offering more flexibility and performance, as well as the ability to display dynamic timeframes that react to Page Filters or attribute values.



Applicable to

- Tables

Set up

- Enter Customize mode on a Table. Click the Add Timeframe option.
- In the Add Timeframe Columns dialog, select a Metric and Data Set to display. Data Set page filters can be selected for the Data Set.
- Select the Frequency from the available options in the dropdown.
- Select a Timeframe. Choose either a Date Range Page Filter or a Custom timeframe with expressionable Start/End dates. Click 'Add'.

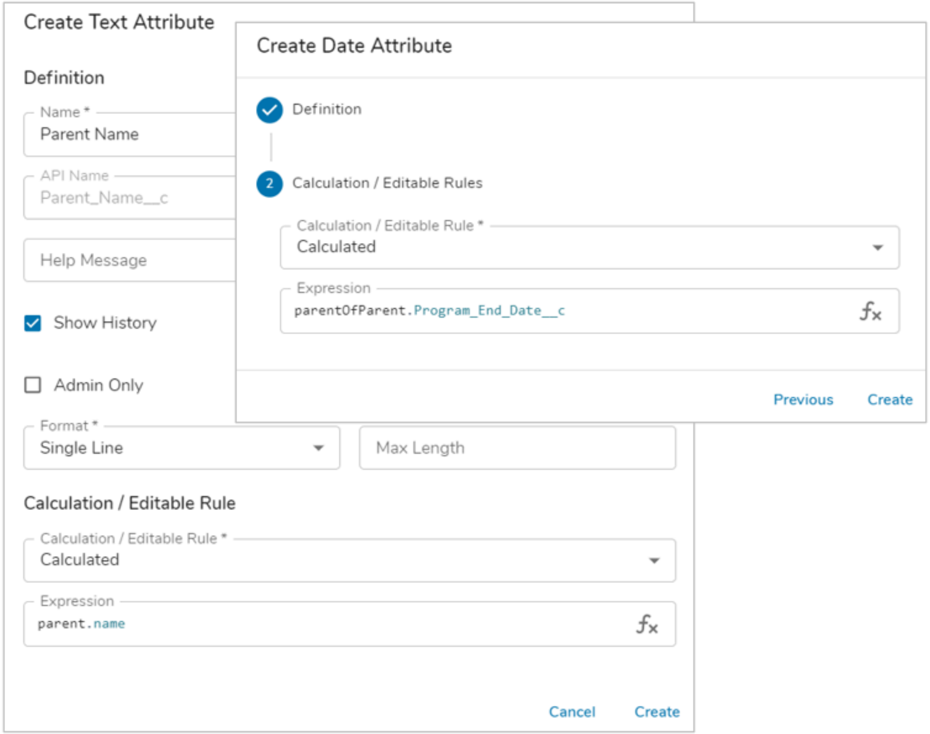
Set up cont.

- Open the Column Configuration dialog to enable Conditional Formatting. If setting Column Width to Fixed, it will apply to the individual sub-columns. Save.
- For more information, please visit our Configuring Tables article.
- Note: *Frequency options are limited to those greater than or equal to the selected Metric's Period of Measure.*

parent & parentOfParent in Attribute/Metric Expressions

Summary

- Previously, the parent and parentOfParent references could only be used in Business Rules and Injected Expressions.
- Often times a series of Business Rules would be configured to set a parent name or type on a child work item.
- Now, the parent and parentOfParent references can be used in Calculated Attribute and Metric expressions, allowing App Admins to convert their Business Rules to persisted calculations improving performance and reducing complexity of the solution.



Applicable to

- Attributes, Metrics, Expressions

Set up

- On the Attribute tab of the Data Panel, click on the Edit icon for a Calculated Attribute or Metric to open its Details dialog.
- In the expression field, use the parent or parentOfParent reference to pull a value from an ancestor work item. Save and Publish.

Rules: Ability to Copy Business Rule

Summary

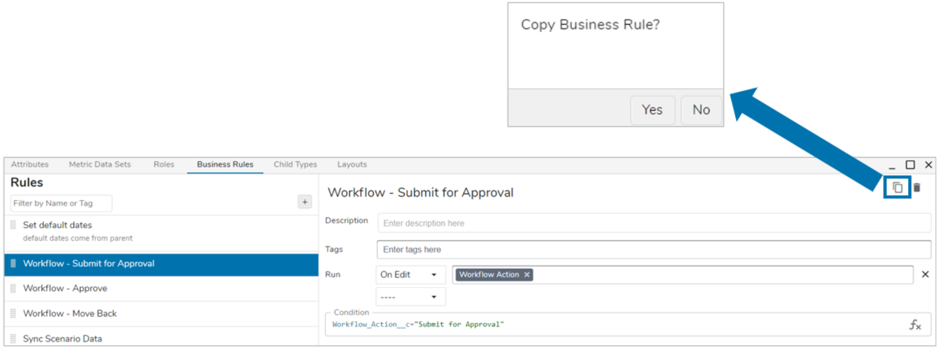
- Previously, when a solution required a similar set of Business Rules to be created, each Business Rules had to be defined individually.
- When there were a large number of common Business Rules the exercise of defining them was tedious.
- Now, Business Rules can easily be copied.

Applicable to

- Business Rules

Set up

- On a Template, open the Data Panel. On the Business Rules tab, select the Business Rule to copy.
- Click on the Copy button at the top right of the Business Rule.
- Select 'Yes' in the dialog. The duplicate Business Rule will now be visible in the Rules list on the Data Panel.



Shibumi Product Announcements

Database Optimization

Summary

- Shibumi will be conducting database optimization activities and will experience a downtime on **June 29 2024**.
- With these optimizations, Shibumi will store data more efficiently and will better leverage the MariaDB UUID feature for indexing. Each of these enahncements will lead to improved solution performance.
- The optimization activities will not modify client data.
- During the maintenance window, users will be unable to access Shibumi.

Maintenance Window

- AP: Saturday, 29 June 2024, 8am-6pm
- US: Saturday, 29 June 2024, 10am-8pm
- EU: Sunday, 30 June 2024, 8am-6pm

Gantt Section Retirement

Summary

- The Gantt section is scheduled to be retired.
- The Workplan Gantt section is not impacted by this retirement and will continue to be available.
- Any solutions using the Gantt section will automatically be migrated to use the Workplan Gantt.

Applicable to

- Gantt

Important Information

- **The Gantt section will be retired with Release 217 which is scheduled for 10 August 2024.**

shibumi