216.0 Release Notes

13 July 2024

Contents

Enhancements

- Cards: Display Date and Text attribute values
- Cards: Expression-able text for Value 1 and Value 2 on the Display tab
- Charts: Pie and Donut Charts
- GraphQL API: API call to disable users in an enterprise
- Page Filters: Pick List attribute
- Tables: Additional Conditional Formatting options
- Workplan Gantt: Configure the Workplan Gantt chart timeframe

Shibumi University

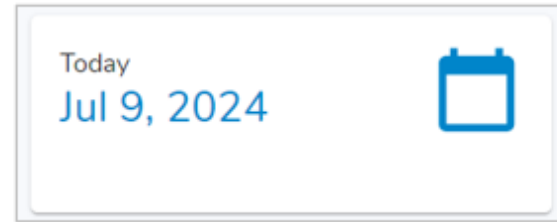- New course: Business Rules

Issue Resolutions

- Upgrading an App that removes data sets does not delete the data
- Table custom edit form does not correctly show and hide conditionally visible fields
- Workplan Gantt: No Horizontal Scroll bar with Target Dates
- Sections moving unexpectedly while in design mode
- Long publish warning no longer appears
- Warning message when copying instance successfully
- Blank default edit form in Association table
- Metric expression dialog drilldown shows errors
- Metric expression dialog drilldown isn't working for dataset references
- Can't edit an Assign Role business rule after initial creation
- Presentation - Move Slide to End Causes an Error
- Update password reset email to reflect accurate timeout

shibumi

Cards: Display Date and Text Values

Summary

- Card sections are used to spotlight key program information. Previously, these sections were able to show the key numeric values.
- Clients expressed the need to display non-numeric information in the Cards as well.
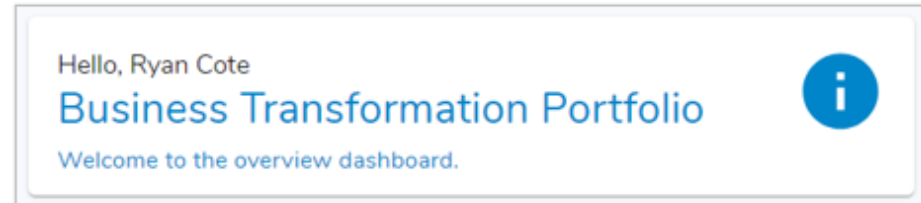- Now, Cards can display Date or Text values.

Applicable to

- Cards

Set up

- On a Card section, configure a Value with the Type: Attribute.
- Select a Text or Date attribute and navigate to the Display tab.
- For the Value 1 drop down, select the previously configured Value.
- Alternatively, select the Text option to input literal text.
- Continue configuring the Card as desired, Save your changes.

Notes

- Expressions can be used when defining Text Values. The best practice is to use expressions to format rather than to determine the value as any Text expression resulting in a value would not react to the Page Filters.

shibumi

Chart: Pie and Donut Charts

Summary

- Previously, Shibumi provided a variety of extremely performant timeframe charts (e.g., line, column, stacked column, waterfall, etc.) to show program data.
- Clients have requested additional, non-timeframe, charts to visually represent program data.
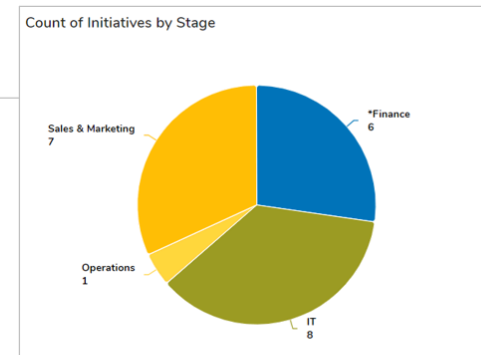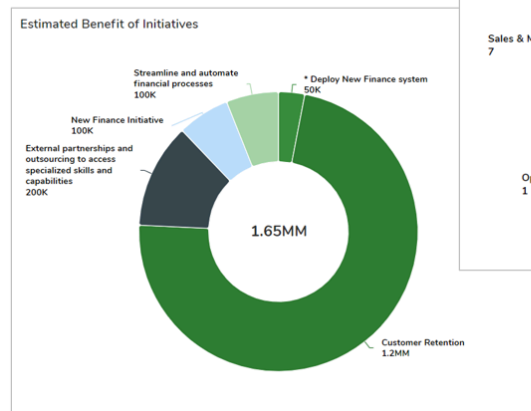- With this release, the Donut and Pie chart options are available.

Applicable to

- Charts

Set up

- On a Layout, open the Add Section dialog and select Chart from the left panel. Click on the Donut or Pie option under Single Axis.
- Open the settings dialog. On the Data tab, select the Type and configure Filter (these can reference page filters).
- On the Display tab of the settings dialog, optionally change the Chart Type. (This only changes the display, no configuration steps will change depending on the chosen display.)

Set up cont.

- For the Value, choose either a Record Count or the aggregation of a selected Attribute.
- For Attribute Aggregation value: Define the Attribute or Metric and its data set. If a Metric is selected, define the timeframe using expressions or a date range page filter.
- Toggle 'Format Values' to define the Label when hovering over data.
- Define the Grouping method: Item Name, Pick List, Association or Checkbox. Under Options, toggle whether labels and values will display on the Chart section. Save.

shibumi

GraphQL API: Disable users

Summary

- Previously, Enterprise Admins could manually disable users from the Enterprise Administration Internal Users and External Users tabs.
- Clients requested the ability to make an API call to disable users so that access could be revoked via a script triggered from another solution. This capability would enable them to manage users from one system rather than requiring separate manual activity in Shibumi.
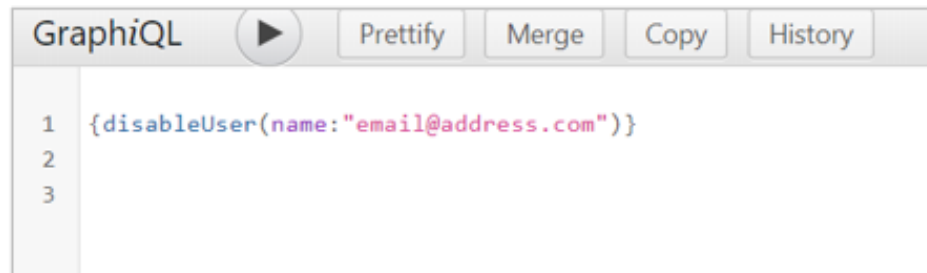- Now, the GraphQL AP disableUser call is available.

Applicable to

- GraphQL API, Users

Set up

- Navigate to the GraphQL API Client page.
- Using the new API call, disable a user from your enterprise. Ex:

```
mutation
{disableUser(name:"email address")
}
```


Notes

- For more information, please visit our GraphQL API Documentation: https://app.shibumi.com/documentation/graphql/v4/overview.html

shibumi

Page Filters: Pick List attribute

Summary

- Previously, when clients wanted to page filter content based on the values of a picklist (e.g., Stage), App Admins set up the page filter using a Drop Down filter and manually added each of the picklist options (e.g., Stage 1, Stage 2, Stage 3, etc.)

- If the picklist options changed, the App Admin also had to change the page filter options. If the same filter was used in multiple places, the App Admin needed to change the options multiple times.

- Now, App Admins can configure an Attribute page filter that maps to a picklist attribute. It automatically pulls the options from the attribute and stays in sync if those options are modified. The Attribute Page filter also includes a Blank option.

Applicable to

- Page Filters, Pick List Attributes

Set up

- From Design mode on a Layout or Dashboard, click the Filter icon on the toolbar to enable the page filter bar.
- Select the plus button and choose Attribute. Add a label to the filter.

Set up cont.

- Choose the desired template from the Work Item drop down field, this will define which Pick List attributes are available for selection.

- From the Attribute drop down, select a Pick List. Optionally enable Multiple Selections or make the page filter Required. Click Next.

- Use the checkboxes next to each option to choose which options should display on the page filter. A Default Value for the page filter can also be selected. If the page filter is set to Required, a default value must be selected. Save.

shibumi

Tables: Additional Conditional Formatting Options

Summary

- Previously, numeric and metric columns in Table sections could be configured to display a cell background color based on the conditional formatting definition of the number or metric's data set.
- While the background color was useful, clients requested additional conditional formatting options to help intuitively communicate program information.
- Now, App Admins can apply conditional formatting to determine background color, font color, whether to display an icon, or whether to display an icon and text.

Applicable to

- Table Data Set columns (i.e., Metrics, Metric Timeframes, Numeric Attributes w/ data sets enabled)

Set up

- On a Table with a data set column, while in Configure edit mode, select the 'Customize' option.
- Click to Configure the data set column. Click to Enable Conditional Formatting in the Display Settings section.

Set up cont.

- In the Format Type drop down, define how the Conditional Formatting will be displayed for the column.
- Choose one of the following options: Background, Text, Icon, Icon/Text.
  - If Icon or Icon/Text is chosen, define the Icon Set that will be displayed within each cell.
- Save the Column and Table.

shibumi

Workplan Gantt: Configure the chart timeframe

Summary

- Previously, App Admins could configure a Workplan Gantt to display a view of work items scheduled over time.
- The timeframe for the Workplan Gantt was set automatically based on the actual dates of the included work items.
- Now, App Admins can configure the Workplan Gantt to display a consistent timeframe by setting specific start/end dates or through a date range page filter.

Applicable to

- Workplan Gantt

Set up

- Open the Workplan Gantt Settings dialog by selecting the gear icon in the top right of the section.
- On the Section tab, enable the 'Override Dates?' checkbox.
- Enter a static date into the Start/End Date fields, or reference a date range page filter using Shibumi's injected expression language.
- Save the section.

shibumi

Shibumi Product Announcements

Copy Work Item Retirement - Delayed!

<u>Summary</u>

- **The ability to Copy work items will be retired but the retirement date is not yet defined.**
- The ability to copy Dashboards, Presentations, and Templates will continue to be available.

<u>Applicable to</u>

- Copy Work Item

<u>Important Information</u>

- **In response to feedback from clients leveraging this capability in their solutions, we are delaying this retirement. Stay tuned for a revised retirement date once we have identified alternative approaches to address current client use cases.**

Gantt Section Retirement

<u>Summary</u>

- The Gantt custom section is scheduled to be retired.
- The Workplan Gantt custom section will continue to be available.

<u>Applicable to</u>

- Gantt

<u>Notes</u>

- Any solutions using the Gantt section will automatically be migrated to use the Workplan Gantt

<u>Important Information</u>

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

shibumi