219.0 Release Notes

21 September 2024

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Enhancements

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Issue Resolutions

- Changing Participant & History view Limit to 1000, reverts back to 25 (but shows 1000)
- Chart: Slice By pick list formatting is no longer aligned
- Chart: Sliced By pick list toggling Format Values on and off disables all pick list options
- Custom Chart not saving X Axis grouping y Associations
- History view shrinks upon opening and saving settings

AI Chatbot: Remove tabs from chat window

Summary

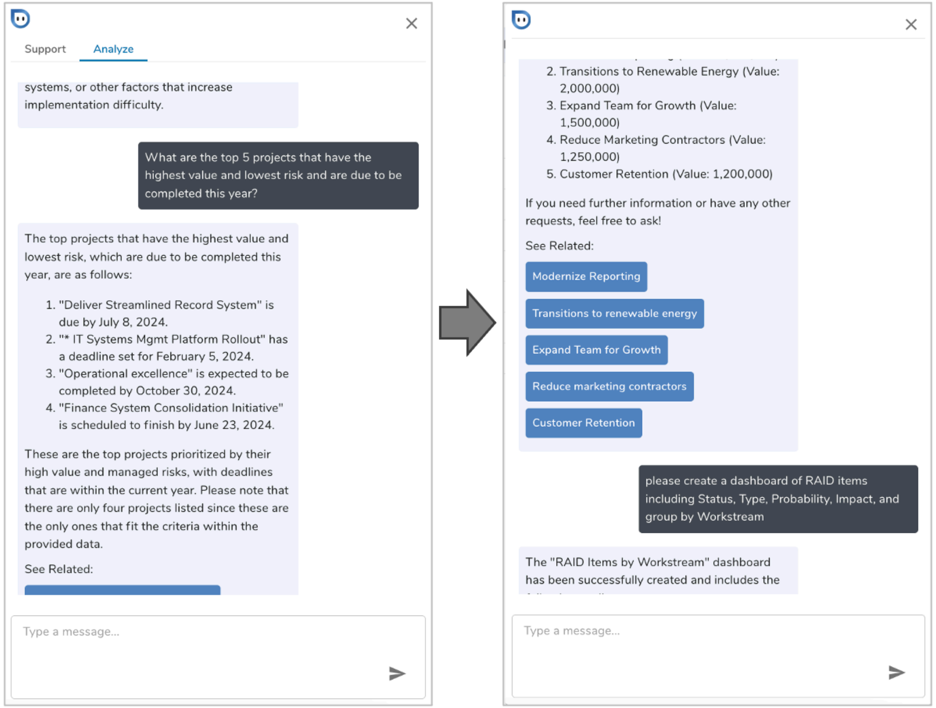
- Previously, using the various offerings from the Shibumi AI Chatbot (Support, Analyze, Create Dashboard) required navigating to their respective tabs within the AI Chatbot window.
- A streamlined approach was desired to cut down on in-screen navigation and to provide a smoother experience.
- Now, each of the Shibumi AI Chatbot offerings are available through a single window and the chatbot uses the current context to deliver an appropriate response.

Applicable to

- Shibumi AI Chatbot

Set up

- Aside from the standard prerequisite attribute configurations required for AI Analyze, there is no additional setup necessary.
- Based on your text input, the AI Chatbot will intuitively interpret the request to determine the response. For instance, asking about dashboard creation will prompt the AI Chatbot to create a new dashboard, versus asking about Charts will result in a Support response providing details from the Shibumi Support Site.



Card: Static values in Operations

Summary

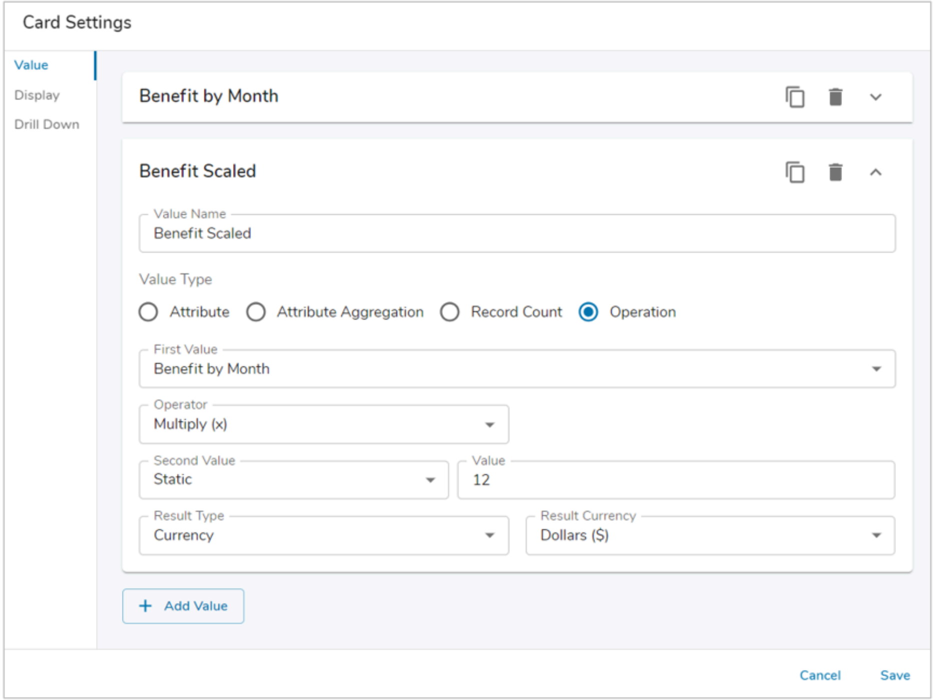
- Previously, when configuring an Operation Value on a Card section, if you wanted to include a static value in the operation, you needed to create an Attribute to hold the static value and then reference it as a value on the Card.
- Having to add an attribute to hold a static value is more complicated than it should be!
- Now, when configuring a Card with an Operation Value, you can select to include a Static value in the Operation.

Applicable to

- Card

Set up

- On a Card section, open the Settings dialog.
- Select the 'Operation' Value Type and choose the 'Static' option for the First Value or Second Value field. Enter a number in the Value field.
- Finish defining the Operation and choose the Result Type for the Value.
- Continue configuring the Card as desired. Save.



Forms: Set separators for multiple fields at once

Summary

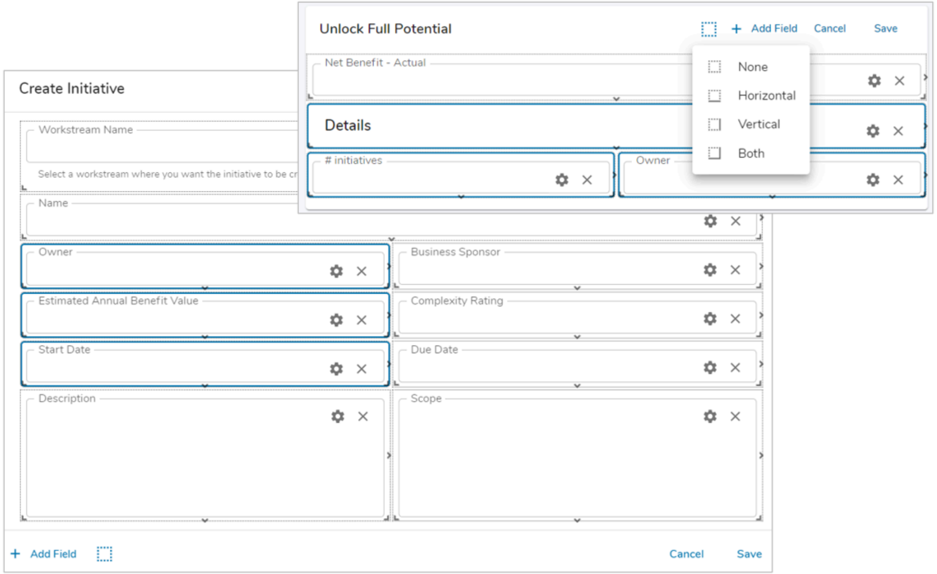
- Previously, to logically group fields together, App Admins configured separator lines between fields on a form section.
- Especially when there were a lot of fields on the form, these separators were tedious to define as each field had to be individually selected and configured.
- Now, App Admins can select multiple fields to apply separators at one time.

Applicable to

- Forms

Set up

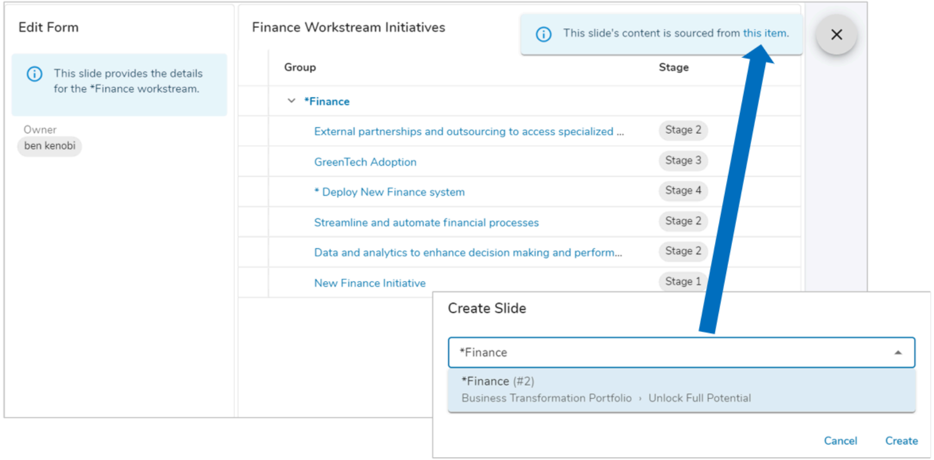
- While in Configure mode, select a form section and then select the Customize Layout option from the Settings gear menu.
- Select a single field and then use ctrl/command + click to multi-select additional fields.
- Click on the Separators icon (square with dashed-line border) in the tool bar and choose from None, Vertical, Horizontal, Both. All selected fields will have the new separator definition.
- Save your changes.



Configure a slide with the context of a work item

Summary

- Previously, presentation slides could be populated by referencing dashboards created on instances.
- This allowed for users to review the dashboard independently or as part of a slide deck but also required that a dashboard had to be configured on each work item. Maintaining dashboards for each work item was tedious.
- Now, you can create a new slide in the context of a work item. Each section on the slide will be populated as if sourced from that work item.



Applicable to

- Presentations

Set up

- On a Presentation, select the blue '+' to open the Create Slide dialog. Select the top drop down to define the context for the slide.
- All sections added to the slide will display their data from the context of the selected item.
- A hyperlink icon will be displayed to indicate the current slide's content is being sourced from the selected work item. Click on the hyperlink in the info message to navigate to the item.

Notes

- The ability to populate a slide by referencing a dashboard has been retired. All existing Dashboard slides will be automatically converted to use the work item context approach.
- Duplicating slides will allow you to change the context to another work item of the same type.
- Viewers of the slide who do not have access to the work item will see the content included on the slide but will not be able to click on hyperlinks to see additional detail.

Table: Calculated Columns

Summary

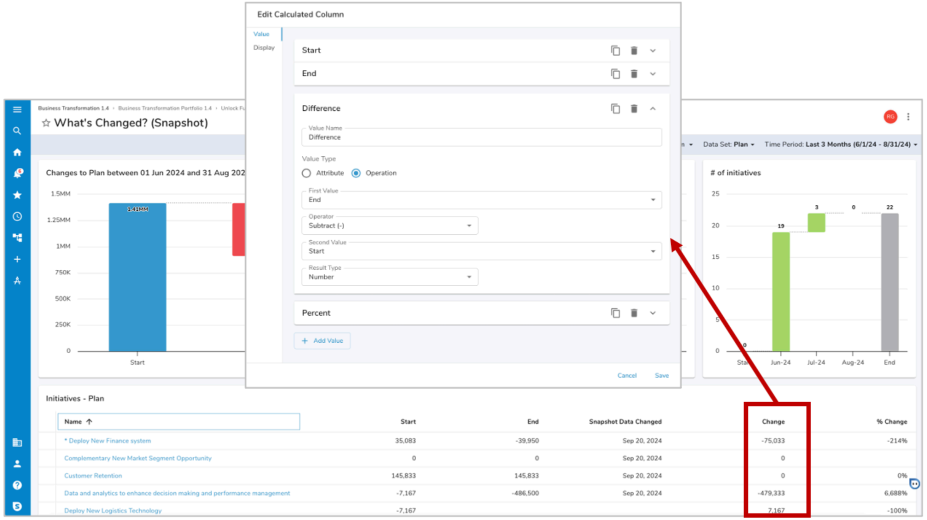
- In cadenced reviews of program data, leadership teams often want to understand what has changed since the last review. Previously, Shibumi supported this requirement by providing the ability to define a calculated attribute subtracting a metric's current time period value from the previous time period value.
- This approach required that the time period for the start and end values included in the calculation be configured into the attribute's defintion on the template. A better solution would allow the leadership team to dynamically change the timeframe of the start and end values.
- Now, we have introduced the ability to calculate the numeric value displayed in a Table column. In the cadenced review example, the calculation can react to page filters to dynamically change the time period to include for the start and end values.

Applicable to

- Tables

Set up

- On a Table section while in Configure mode, select the gear icon and choose 'Customize' from the menu. Click on '+ Add Column'.



Set up cont.

- Select the 'Calculation' option, this will open the Calculated Column settings dialog. Configure two Values, each with an Attribute Value Type, for a Metric attribute define the Data Set and Timeframe.
- For the third Value, select Operation as the Value Type. Choose the two previously configured Values, define the Operator (+, -, x, /) and the Result Type (Number, Percentage, Currency) for the Value.
- On the Display tab, define the Value to Display (Operation). Configure the Decimal Places, Header Label and Width for the Column. Select the 'Add' button. Save the Table.

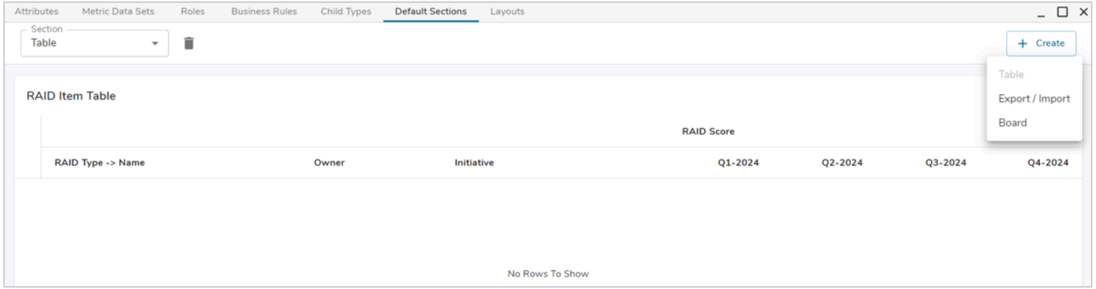
Default Sections: Table, Board, and Export/Import

Summary

- One advantage of Shibumi is the ability to customize layouts and uniquely configure sections. Defining configuration for a section is not difficult but requires some basic understanding of the Shibumi solution (e.g., to know which attributes to include as columns on a table).
- Now, App Admins can define default sections that can be used to streamline configuring of sections. For example, on the Initiative template the App Admin could define a default Table that includes columns, grouping logic, aggregation logic, etc. Whenever a table of Initiatives is added to a layout, dashboard, or presentation, the table will start with this default configuration.
- Defaults can be defined for Tables, Board, and Export/Import sections.

Applicable to

- Table, Board, and Export/Import



Set up cont.

- On a Template, open the Data Panel and select the 'Default Sections' tab. Select the 'Create' button and choose one of the section options.
- Configure the Table, Board, or Export/Import section as desired.
- Publish the Template.
- On a layout, dashboard, or presentation, from the Add Section dialog, select Table, Board or Export/Import, then select the desired template.
- The Default section, as defined on the template, will be added. Continue configuring the section as desired.