shibumi

219.1-2 & 220.0 Release Notes

19 October 2024

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- Fix Opensearch internal communication certificate

219.2 Issue Resolution

- Business Rule timeout handling is failing

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- Expressions: addYears() Function
- Tables: Filter a calculated column
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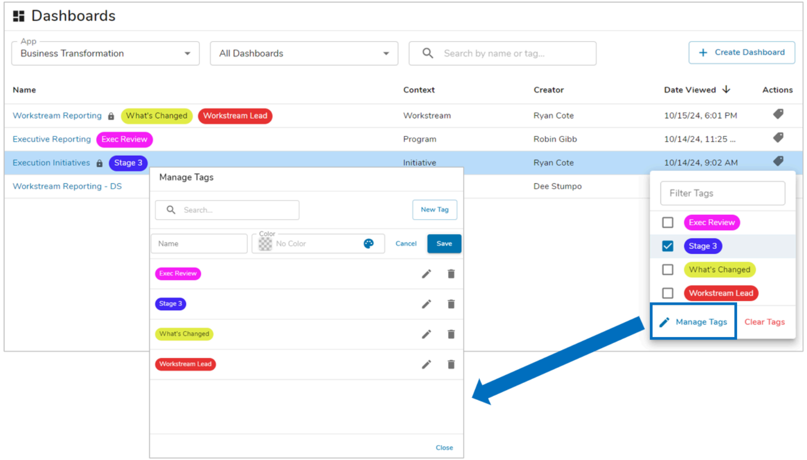
220.0 Issue Resolutions

- Table date column filtering on 'equals' is a day out
- Cannot save zeroes as values for required metric fields in Forms
- Set Value Business Rule: Type-ahead missing for Value field
- Workplan Gantt is not respecting the percentage number attribute for Percent Complete on child creation

Dashboards Central



Summary

- Previously, Dashboards could be created and managed from a Dashboards tab or Dashboard List and were defined as descendants of other work items. Users needed to navigate to a specific instance to find a specific dashboard, and there was no way to view all solution Dashboards in a single location.
- Now, Dashboard Central is available from the Shibumi sidebar. This provides a centralized location for easy Dashboard access, creation, and management. The inventory on Dashboard Central will only include new dashboards (i.e., not the legacy dashboards created as descendants of work items).
- For now, only App Admins will be able to create new Dashboards within Dashboard Central. Users with solution access will be able to view Public Dashboards or any Private dashboards on which they hold a role.

Applicable to

- Shibumi Platform, Dashboards

Set up

- Navigate to Dashboard Central by selecting the icon in the sidebar. View all Dashboards visible to you and manage any on which you have Admin rights. Only App Admins can create new Dashboards.
- **Tags** can be applied to Dashboards by selecting the Actions icon and selecting the desired Tags. Only users with Admin rights on a dashboard can add Tags to the dashboard.
- Additional Tags can also be created from the Actions dialog by selecting 'Manage Tags'.

Notes:

- Public Dashboards can be set as Enterprise Homepages.

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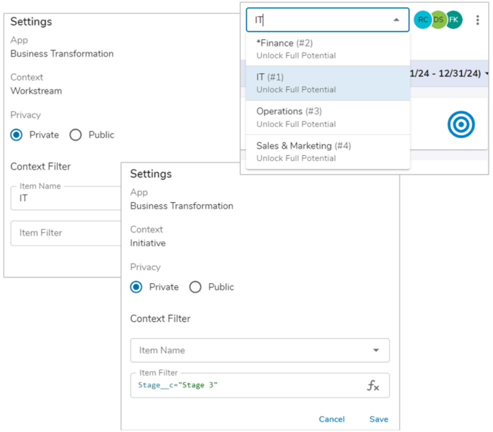
Dashboards: Context

Summary

- Previously, dashboards were defined on a work item. The content on the dashboard was scoped to the work item and the dashboard was accessible to anyone who could access the work item.
- In Shibumi solutions, the solution hierarchy often represents reporting levels. E.g., with a solution hierarchy Program->Region->Workstream->Initiative, a Program level dashboard is scoped to the full program, a Region level dashboard reports on progress within a region, a Workstream level dashboard shows achievement within a workstream, etc.
- To provide the dashboards at each level, App Admins defined a unique dashboard on each work item. E.g., a separate Region dashboard created for each region: NA, EU, and AP. When a dashboard change is required, the App Admin must apply the change to each individual dashboard separately. This process was time-consuming and error prone.
- Now, the new Dashboards allow for a single dashboard definition to be mapped to a Context template. All work items of the Context template are listed in a Context Selector on the dashboard. Users reviewing the dashboard can easily switch from one work item to the next to have the dashboard content immediately update.
- Note: all Shibumi permissions are still applied. Users will only see a work item in the Context selector if they have permissions to see the work item.



Set Up

- As an App Admin, on the Dashboard Central page or from the Sidebar Create, create a new Dashboard. Define the Name, Privacy, App, and Context (template) of the new Dashboard. Select the 'Create' button.
- The Context Selector dropdown in the top right determines which work item is currently being used to scope the dashboard content.
  Open Dashboard Settings to filter the work item Context. Use the Item Name field to define a single work item for the Context; this will remove the Context Selector dropdown from the dashboard.
- Alternatively, use the Item Filter to enter an expression to filter the work items options included in the Context Selector.
- Configure the Dashboard layout as desired, select 'Finish Configuring' from the More Actions menu on the Dashboard.

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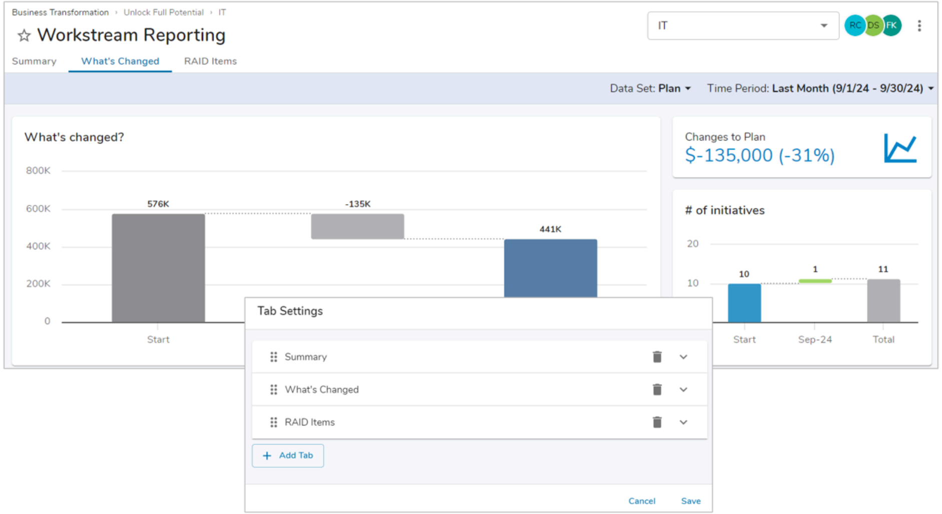
Dashboards: Tabs



Summary

- Previously, dashboards were limited to a single layout. App Admins often configured work items to be “tabbed dashboards” so that, e.g., during a program review session, they could share a different perspective of the program on each tab. This work item approach required changes to be made to the app and, therefore, was more brittle and less flexible than desired.
- Another approach had App Admins creating multiple dashboards (e.g., a dashboard for each Region) resulting in a heavy maintenance tax. When an executive requested a change, it had to be made to each separate dashboard. Also worth noting, the flow of the review sessions could seem disjointed as a full review would require navigation to each separate dashboard.
- Now, the new dashboard capability provides greater layout flexibility – with the ability to include form sections and tabs to better support the different perspectives required in cadenced performance reviews.

Applicable to

- Dashboards

Set up

- On a Dashboard, click the Actions Menu and open the Tab Settings dialog.
- Select the '+ Add Tab' button, provide a Name and the enabled platforms for the Tab. Save. Configure each Tab layout as desired.

Notes

- Visibility expressions are not available for Tabs on Dashboards.
- When there is only one tab on a Dashboard, the tab bar will not be displayed.
- Views, Lists, Embed sections, and Custom sections cannot be added to the new Dashboards.

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Dashboards: Privacy

Summary

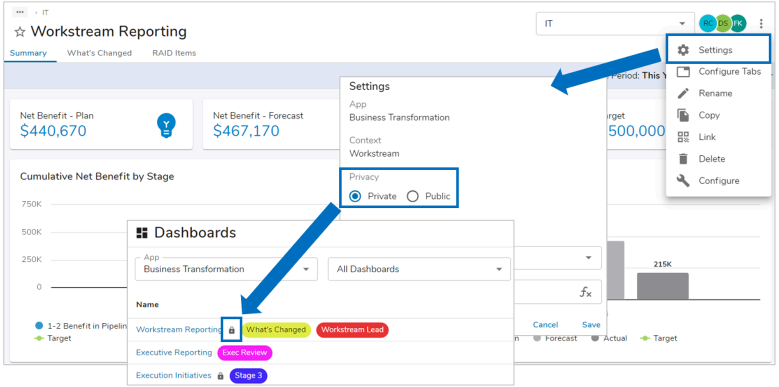
- Previously, if users had access to a work item, they could see all dashboards defined on the work item.
- It was not possible to limit or filter the list of dashboards displayed on a work item's Dashboards tab, often resulting in an overwhelming inventory of dashboards.
- It was also not possible to stage a dashboard for review by a small group before making it available to a broader set of users or to limit access to the dashboard to a small group.
- Now, on new dashboards, these issues are mitigated with the introduction of Privacy settings.

Applicable to

- Dashboards

Set up

- As an App Admin, on the Dashboards Central page or from the Sidebar Create, create a new Dashboard. Define the Name, Privacy, App, and Context of the new Dashboard. Select the 'Create' button.
- To modify an existing Dashboard's privacy setting, open the Dashboard Settings dialog and toggle the Public/Private option under Privacy.



Privacy Settings

- **Public**: Visible to users who have access to one or more instances of the Dashboard Context template.
- **Private**: Visible to users holding a role on the Dashboard. On Dashboard Central, private dashboards are displayed with a 'lock' icon. If users hold a role on the dashboard but do not have access to an instance of the Dashboard Context template, they will not see data on the dashboard.

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New Section: Dashboard Table

Summary

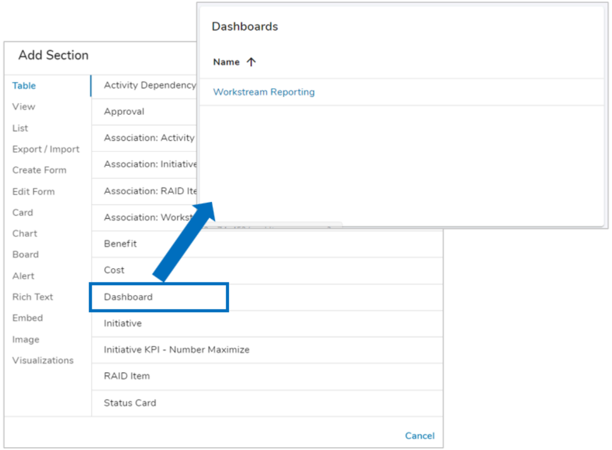
- Previously, App Admins could include Dashboard Lists in their solutions to allow for the creation and management of legacy Dashboards outside the Dashboards tab.
- Admins often used these Dashboard Lists to spotlight dashboards for the various personas participating in the program. E.g., one list includes the HR dashboards, one list includes the Finance dashboards, etc.
- Now, with the release of new Dashboards, a new Dashboards Table section is available to provide similar spotlighting capability to App Admins.

Applicable to

- Dashboards, Tables

Set up

- On a Layout, open the Add Section dialog and choose the Dashboard option under the Table section.
- To filter the visible Dashboards, click on the gear icon and open the Settings dialog. Filter by entering a single Tag. Save.



Notes

- Dashboard Tables will display **Public** Dashboards which have been configured in the **current Context**.
- E.g., A Dashboard Table is added to the Workstream template. This Dashboard Table will only display Public Dashboards which have their Context defined as the Workstream template. If one of these public Workstream Dashboards is locked to the IT instance, it will not appear in the Dashboard table on other workstream instances.

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addYears() Function

Summary

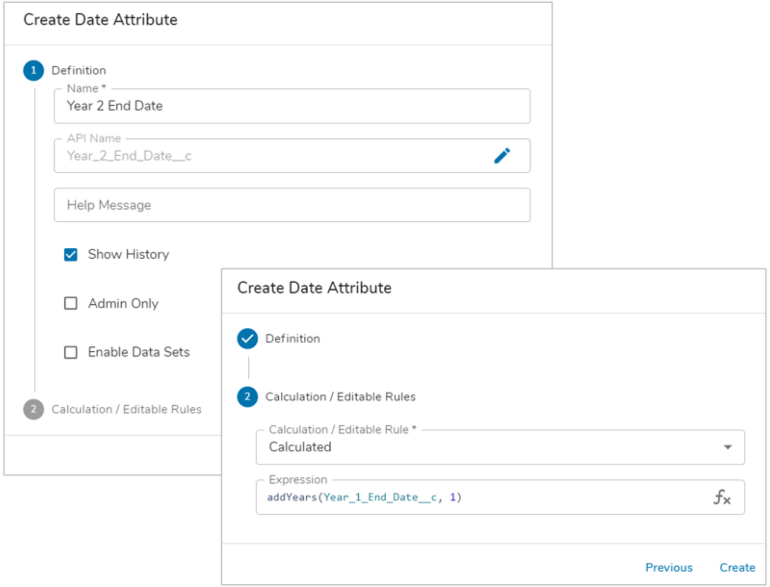
- Previously, e.g., when App Admins needed to calculate a date to be a year after another date, they added 365 days using the addDays() function or 12 months using addMonths() function.
- An addYears() function will make these calculations simpler and will better support the yearly constructs of Retail Calendars (which is a future capability planned on the Shibumi roadmap).
- Now, the addYears() function can be used to add or subtract years from a date.

Applicable to

- All places where the Shibumi Expression language can be used.

Set up

- Syntax: addYears(date, integer)
- date: An expression that results in a date value (i.e., a hard-coded date, a reference to a date attribute, or a function that returns a date value).
- integer: The value to add/ subtract to/from the date. An expression that results in an integer (i.e., a hard-coded number, a reference to a numeric attribute, or a function that returns a number).



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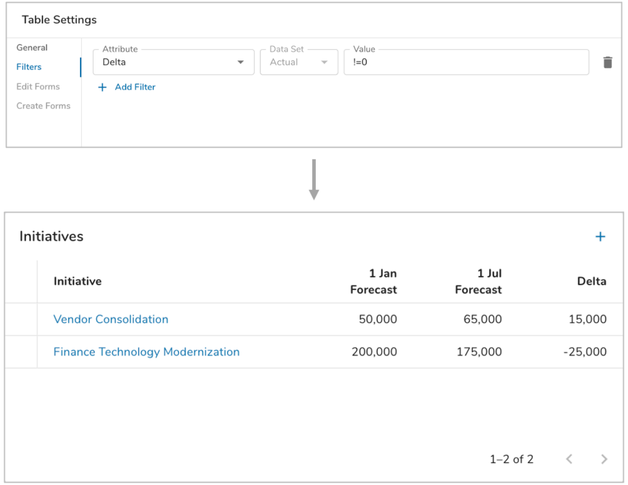
Tables: Filter a Calculated Column

Summary

- Previously, we introduced the ability to configure a calculated column in a Table section. A common use case for the calculated column is to show the difference in values from a start and end date, e.g., Initiative Benefit Value forecasted on 1st Jan compared to Benefit Value forecasted on 1st Jul. For many initiatives in the program, the forecasted Benefit Value will not have changed. The calculated column (showing: Jul Benefit Value – Jan Benefit Value) would show a 0 for all unchanged initiatives.
- The leadership team would not need to review the initiatives with an unchanged forecast and instead would want to focus on the changed forecasts. To do this, each time the page loads, they must manually change the filter on the table column to only show those initiatives that are not equal to 0.
- Now, App Admins can filter the Table using the Calculated Column so that, in the example, when the page loads, the Table is already showing only initiatives with a changed forecast.

Applicable to

- Tables



Set up cont.

- On a Table section with a Calculated Column, open the Table Settings dialog.
- Navigate to the Filters tab. Add a new Filter, in the Attribute drop down scroll to the Calculated Columns group.
- Select the Calculated Column to be filtered and enter a filter Value (can be a static number or a reference to a page filter).
- Save your changes.

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