220.1-7 & 221.0 Release Notes

16 November 2024

220.1-7 Contents

Enhancements

- Dashboards: Navigation sidebar Dashboard icon only visible if user is an App Admin or has access to a Dashboard
- Dashboards: Display dashboards from current app when clicking on Dashboard Center icon

Issue Resolutions

- Sidebar Create New missing App as subtext
- Gantt Chart Colors not displaying as expected for milestones
- Sidebar create menu doesn't update until page refresh
- Can't refresh List/Views sections on dashboards if you don't have permission to the parent item
- Chart series are not sorting the same as the X-axis labels with mixed casing
- Scheduled Business Rules are crashing when "end of month" is set and previous month was 31 days
- Page Filter changes are forcing a re-render for Custom tiles and reverting to original payload, destroying any tile state

221.0 Contents

Enhancements

- Admin: Consolidated Configure and Design edit modes
- AI: AI Recommend Work Items
- Bubble Chart: Support for 0 and negative Z axis values
- Card: Add additional Drilldown Columns
- Table: Ability to select preset options when configuring metric timeframe columns
- Table: Minimum Width Columns
- Templates: Admin-only setting for templates, intrinsic attributes, and metrics
- Work Item Page Filters: “Blank” and "Select All" options

Issue Resolutions

- Page filters disappear when adding a new tab to new dashboards
- Cannot paste hyperlinked text in Rich Text Sections anymore
- AI Chatbot does not size well on Mobile

AI Recommend Work Items

Summary

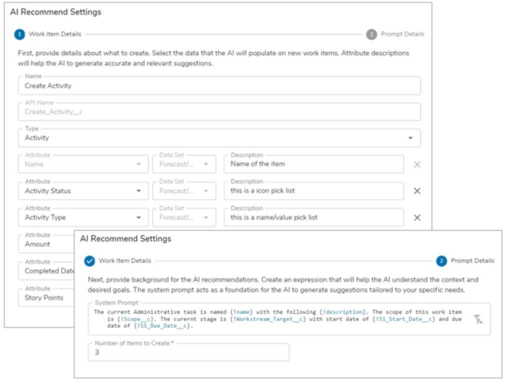
- In the innovation lifecycle, once a program is defined to address corporate objectives, the next step is to identify the initiatives that will help achieve the objectives. Previously, Program Leadership generated ideas for these initiatives from a variety of sources: facilitated workshops, crowd-sourcing exercises, advisory firm consultation, etc.
- These approaches are good but can be expensive and time consuming and, at times, can be limited to the scope of experience of the participants.
- Now, Shibumi AI includes a Recommend Work Items capability that leverages the power of OpenAI to source ideas - introducing collective experiences and industry best practice.

Applicable to

- Templates, Tables

Set up

- On the Data Panel of a Template, select the 'AI Actions' tab.
- Click the 'Add AI Action' button, provide a Name and the template type (this will only display direct children of the current template).



Set up cont.

- Use the '+ Add Attribute' button to define which attributes should be populated. Include attribute descriptions to help Shibumi AI generate relevant content.
- Click Next. Enter a System Prompt using text and/or expressions and define the number of items to create. Save.
- Open the Settings dialog for a Table which displays the matching template type of the AI Action.
- On the AI Actions tab of the Table Settings, select the name of the action. Save and Publish.
- On an instance, select the 'AI Create' icon on the Table. Optionally, edit the prompt and number of items to create. Select 'Create' to trigger the AI Action to add recommended items to the Table.

Bubble Chart: Support for 0 and negative Z axis values

Summary

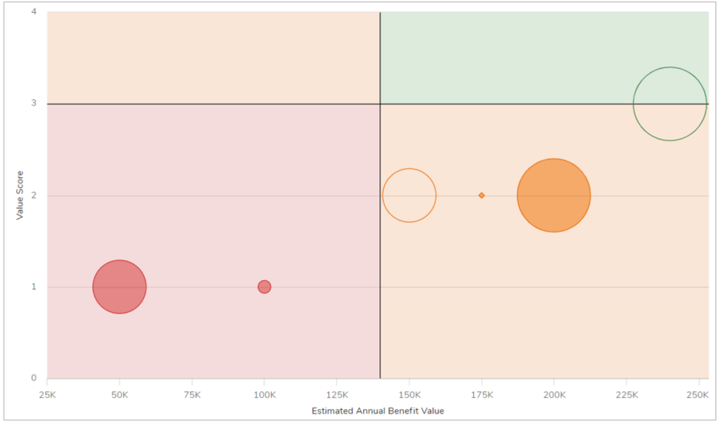
- Previously, the Bubble Chart section was introduced to visualize data from three dimensions. A common usage of the Bubble chart is to support prioritization (e.g., assessing proposed initiatives by Complexity, Strategic Alignment, and Anticipated Benefit.)
- Clients noted that the Bubble Chart didn't display 0 or negative Z axis values, which were critical to fully compare and prioritize options.
- Now, 0 values will be represented with a diamond and negative values will be displayed as a hollow circle.

Applicable to

- Bubble Chart

Set up

- No additional configuration required outside of section set up.
- On a Layout, open the Add Section dialog and select Chart from the left panel. Click on the Bubble option under Multiple Axis.
- Open the settings dialog. On the Data tab, select the Type and configure Filters (these can reference page filters).



Set up cont.

- On the Display tab, define the Value for each of the three axes.
- Configure the rest of the Bubble Chart as desired. Save.
- Note the new treatment for 0 and negative Z axis values: Zeroes appear as diamonds and negative values appear as hollow circles using the absolute value of the Z value (i.e., bubbles with Z values of 50 and -50 will be the same size) while both respect the color settings defined in chart configuration.

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Card: Additional Drill Down Columns

Summary

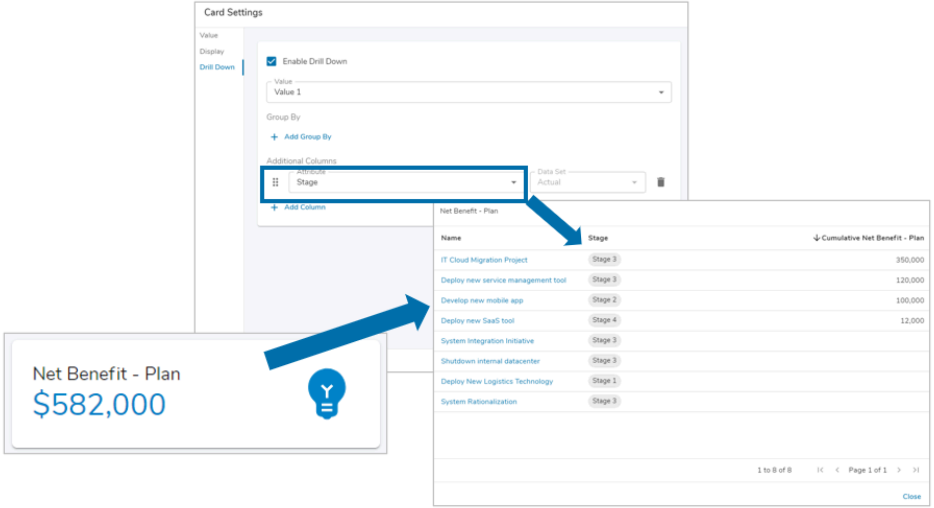
- Previously, App Admins had the ability to set up Drill Down on the Card section to help improve the ability to analyze program data.
- A common request from clients was to include more detail to provide additional context when drilling down into the values.
- Now, Card sections have the ability to be configured with additional columns displayed within their Drill Down dialog.

Applicable to

- Card

Set up

- Configure a Card with at least one aggregated or record count Value. Navigate to the Drill Down tab of the Card Settings dialog.
- Select the checkbox to enable Drill Down, add any desired Group By's to be displayed in the dialog.
- Select the '+ Add Column' to add a new column to the Drill Down dialog. Continue adding as many additional columns as desired. Save.



Note

- If there are multiple Group By levels defined for your Drill Down configuration, the additional columns will be displayed once the user has drilled down to the lowest level.

Preset options for Metric Timeframe Columns

Summary

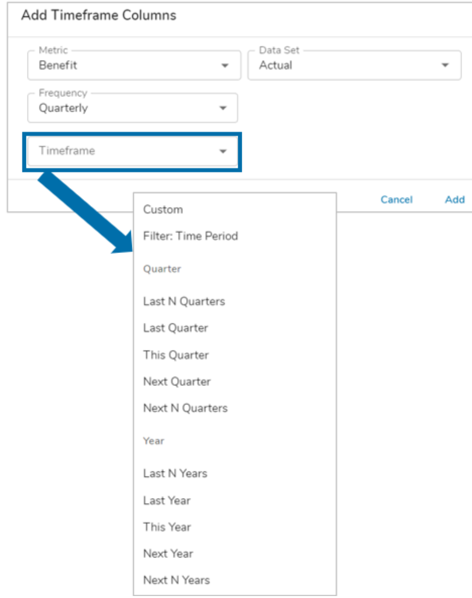
- Previously, when configuring Metric Timeframe columns within Table sections, App Admins had the ability to point to a page filter or to define a Timeframe based on a custom date range.
- This approach was not consistent with other areas in the product where date ranges are defined.
- Now, when configuring Metric Timeframe columns in Tables, App Admins can additionally select from various preset options for the Timeframe.

Applicable to

- Tables

Set up

- On a Table section, Customize the Table and add a Metric Timeframe Column. Select a Metric, Data Set, and Frequency.
- Choose one of the available preset options for the Timeframe, select a date range page filter, or specify a custom start and end date. Add and Save.



Notes

- Available options are equal to or greater than the defined metric Frequency. E.g., a Quarterly metric will only have Quarterly and Yearly preset options available for the Timeframe selection.

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Admin-Only Settings

Summary

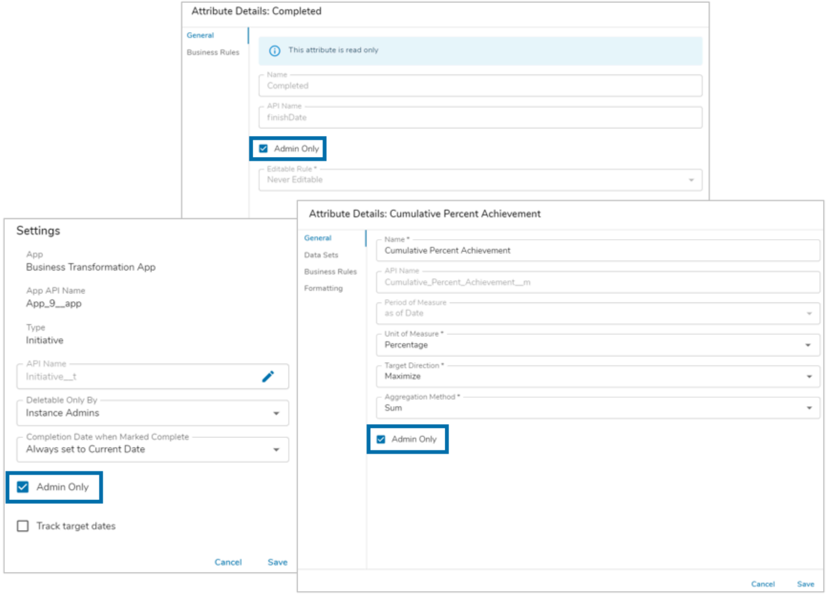
- Previously, both to simplify dashboard creation and to enable a level of security controlling which attributes would be exposed, App Admins could set custom attributes to be Admin-only. With this setting, the attribute would not be available to non-App Admins when configuring sections on dashboards or presentations.
- App Admins have requested that this capability be extended to metrics, out-of-the-box attributes, and Templates.
- Now, App Admins can set all of these to be Admin Only.

Applicable to

- Templates, OOTB Attributes, Metrics

Set up for Templates

- Navigate to a desired Template. Click on the 'More Actions' menu in the upper right corner and select the 'Settings' option. Toggle the 'Admin Only' checkbox. Save and Publish.



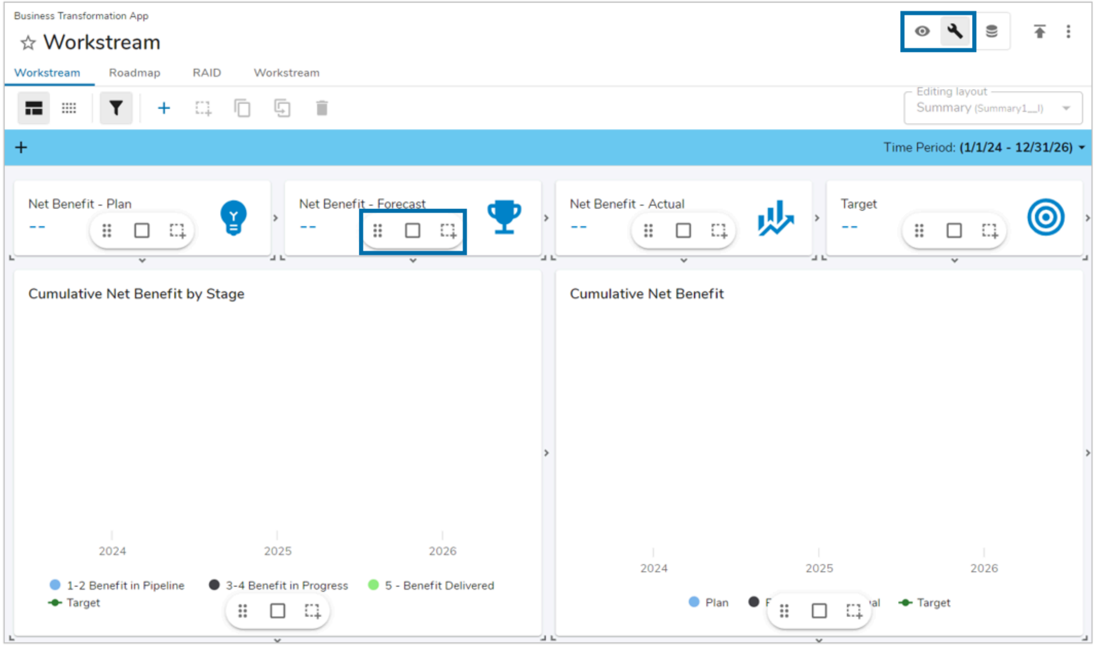
Set up for Intrinsic Attributes and Metrics

- On a Template, toggle open the Data Panel. Select the 'Edit Attribute' button on an OOTB Attribute or Metric.
- From the Attribute Details dialog, toggle the 'Admin Only' checkbox.
- Update and Publish.

Consolidated Configure and Design edit modes

Summary

- Previously, configuring layouts, dashboards, and presentations involved a constant toggle between the Configure and Design edit modes to switch between editing Settings for individual sections or editing placement on the layout.
- Now, we've removed the need to toggle and have consolidated the Configure and Design modes, ultimately saving time and increasing productivity



Applicable to

- Template Layouts, Dashboards, Presentations

Notes

- Display mode has been brought to Layouts.
- Use the 'Select' icon from the Section Controls to Copy/Move/Delete single or multiple sections.

Work Item Page Filters: "Blank" and "Select All" options

Summary

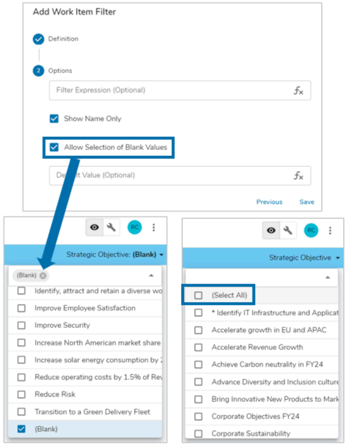
- Previously, there was not an easy way to filter to Blank using a Work Item page filter.
- The Work Item page filter is often used for associations. E.g., the page filter shows the Strategic Objective work items. A table lists all initiatives. When a selection is made in the Strategic Objective filter, the table retrieves initiatives with an association to the Objective. In this example, without the ability to filter to “Blank”, it was difficult to identify the initiatives that did not yet have alignment assigned to a Strategic Objective.
- Now, App Admins can configure Work Item Page Filters to filter on blank values. Additionally, Work Item Page Filters now have a 'Select All' option available.

Applicable to

- Work Item Page Filters

Set up Blank Page Filter

- Add a new Work Item Page Filter. Configure the filter options as desire (e.g., Filter Context, Work Item, Multiple Selections, etc.).
- Toggle the 'Allow selection of Blank values' checkbox, Save. The (Blank) option will now be available.



Set up Select All

- Configure a Work Item Page Filter as desired, tie the filter to one or more sections available on the Layout/Dashboard/Presentation.
- In Display mode or on an Instance, open the Work Item Page Filter.
- See the 'Select All' option available.

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