221.1-7 & 222.0 Release Notes

14 December 2024

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Enhancements

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Issue Resolutions

- Upgrade sometimes fails when deleting a template with associations
- Newly created filters disappear from the filter bar when an attribute is created or deleted
- Improve UX of new Section Controls
- Difficult to edit a rich text field on a presentation
- "There are unsaved changes" message when saving Template settings
- Page goes blank after moving a section
- AI Create Dashboard: Table does not Fit to Window
- Search page takes a long time to switch template types

Sunset Notice

- Metric Lists and Work Item Lists will no longer be available in the Add Section dialog with Release 224.0 (anticipated Feb 2025)

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AI Create Dashboard using Default Table

Summary

- In a previous release, Shibumi introduced the AI Create Dashboard capability which provided a new way to configure Dashboards. Separately, Shibumi also introduced the ability to define a Default Table which helped to streamline configuration.

- The AI Create Dashboards capability did not leverage the Default Table when producing a dashboard.

- Now, when using the AI Create Dashboard feature, Shibumi uses the Default Table configuration to add a table to the dashboard. Cards and Page Filters are automatically created based on the Default Table columns.

Applicable to

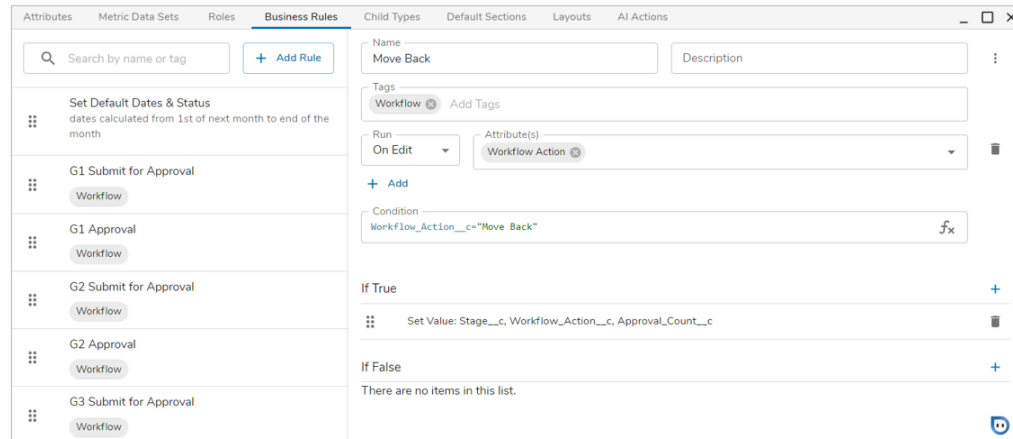- AI Create Dashboard, Default Sections

Notes

- If a Default Table exists, AI Create Dashboard will always use it and then will add additional attributes if they are specifically requested in the chat prompt.

- A Work Item Page Filter will be added for any Association column; an Attribute Filter will be added for each Pick List column; and a Date Range Filter will be added for each Date column.

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Updated Business Rules Tab

Summary

- Previously, App Admins could configure Business Rules to incorporate business logic into their Shibumi solutions.
- Functionally, no changes have been introduced but as part of our continued progression towards a more modern user experience, we've given a facelift to the Business Rules Tab available on a Template's Data Panel!
- The new design better organizes the key details for a Business Rule and streamlines the process of adding new Business Rules.

Applicable to

- Business Rules List

Set up

- No setup necessary. This updated interface is immediately available on all templates.
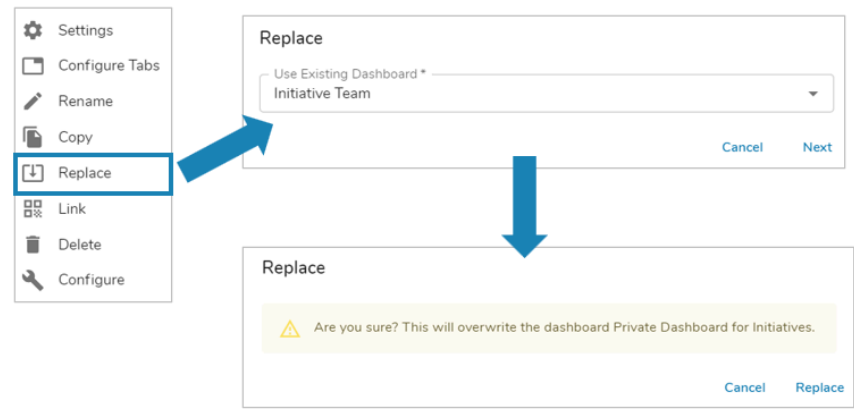
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Replace Dashboard

Summary

- Previously, App Admins could configure dashboards to provide persona-specific program reporting. Sharing the dashboard with others using the Public and Private dashboard setting was easy.
- However, a common challenge was encountered when changes were requested for the dashboard. It could be disruptive to users if the App Admins made edits while they were reviewing the dashboard.
- In the upcoming release, we are introducing a new "Replace" option that enables the App Admin to avoid disruption when making dashboard updates.
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Applicable to

- Dashboards

Set up cont.

- Make a copy of the dashboard to be updated.
- Update the copy.
- Once complete, navigate back to the original Dashboard.
- Open the More Actions menu.
- Select 'Replace' and choose the copied/updated Dashboard from the dropdown list.
- Select Next. Confirm the change by selecting Replace.
- The Dashboard has been updated without any lapse of access for those utilizing it!
- Note: The participant list, privacy setting, and dashboard URL will not be impacted by the update.

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addQuarters() Function

Summary

- Previously, when App Admins needed to calculate a date to be a quarter after another date, they added 3 months using the addMonths() function.
- An addQuarters() function will make these calculations simpler and will better support the quarterly constructs of Retail Calendar coinciding with this Release. E.g., 13-period calendars have one quarter containing 4 months.
- Now, the addQuarters() function can be used to add or subtract quarters from a date.

Applicable to

- All places where the Shibumi Expression language can be used

Set up

- Syntax: addQuarters(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).

Set up cont.

- 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.

Notes

- In a 13-Period Retail Calendar: If you're in the quarter that has 4 periods and you are in the 4th period of the quarter, adding one quarters with the addQuarters() function returns the last day of the 3rd period in the next quarter.

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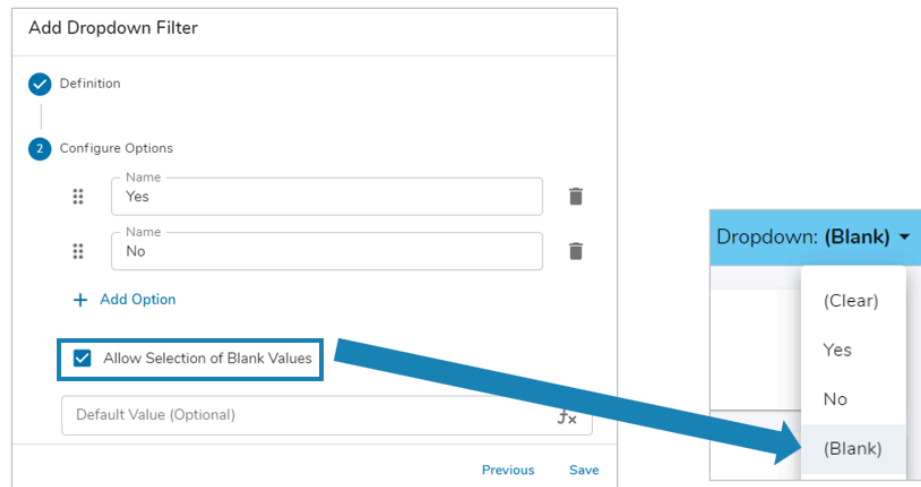# Ability to filter "Blank" values on Dropdown Page Filter

Summary

- Previously, the Dropdown page filter allowed users to either select multiple or individual options. There was not an ability to filter for blank values.
- The Dropdown page filter is often used to filter the values in text fields. Without the ability to filter to "Blank", it was difficult to identify work items that were still missing key text field information (e.g., Charter, Scope, etc.).
- Now, App Admins can configure Dropdown page filters to filter on blank values.

Applicable to

- Dropdown Page Filters

Set up

- Add a new Dropdown page filter. Configure the filter options as desired (e.g., label, allow multiple selection, required, etc.).
- Toggle the 'Allow selection of Blank values' checkbox, Save. The (Blank) option will now be available at the bottom of the list.

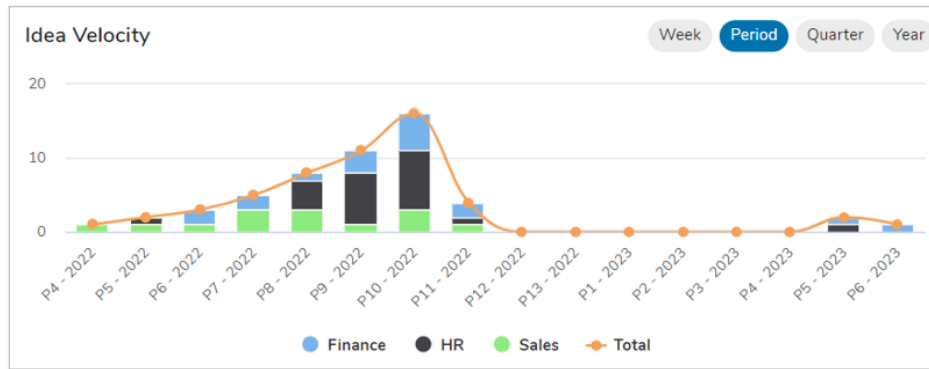shibumi

Retail Calendar

Summary

- Previously, Enterprises created within Shibumi were based on a Fiscal Year Calendar, with the ability to set the Fiscal Year End Month upon creation.

- This calendar definition limited Shibumi's ability to be utilized by retail organizations. Retail companies use calendar structures that better support the cadence of the retail industry. The layout of the calendar lines up holidays and ensures the same number of Saturdays and Sundays in comparable months. Hence, like days are compared to like days quarter-over-quarter and year-over-year for sales reporting purposes.

- Now, Enterprises can be created from one of the Retail Calendar variations (4-5-4, 4-4-5, 5-4-4, and 13-period).

Applicable to

- Shibumi Platform

Setup

- Please contact your Shibumi Representative to request set up of a Retail Calendar Enterprise.

Notes

- 13-Period: The retail year is divided into 13 periods, each consisting of 4 weeks (28 days). With each period having 28 days, the total comes to 364 days. Every 5-6 years, an extra week is added to reconcile the calendar year (making it a 53-week year).

- 4-5-4, 4-4-5, 5-4-4: Each of the numbers represent the weeks in a period. Each quarter of the year follows the pattern.

  - E.g., in a 4-5-4 pattern, each quarter has 4 weeks in the first period, 5 weeks in the second period, and 4 weeks in the third period. Each quarter has 13 weeks, and over four quarters, this totals 52 weeks (364 days). Every 5-6 years, an extra week is added to reconcile the calendar year (making it a 53-week year).

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Advanced Sunset Notice

<u>**Summary**</u>

- Effective with Release 224 (anticipated February 2025)
- Metric Lists and Work Item Lists will no longer be available from the Add Section dialog.
- Any existing use of these sections will continue to be supported.
- The notice being provided here is that these sections will not be able to be <u>added as new sections</u> to layouts, dashboards, and presentations.
- **Note: this will not affect the Metric Timeframe View nor Work Item View sections. You will be able to continue to add the View sections.**

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