shibumi

222.1-4 & 223.0 Release Notes

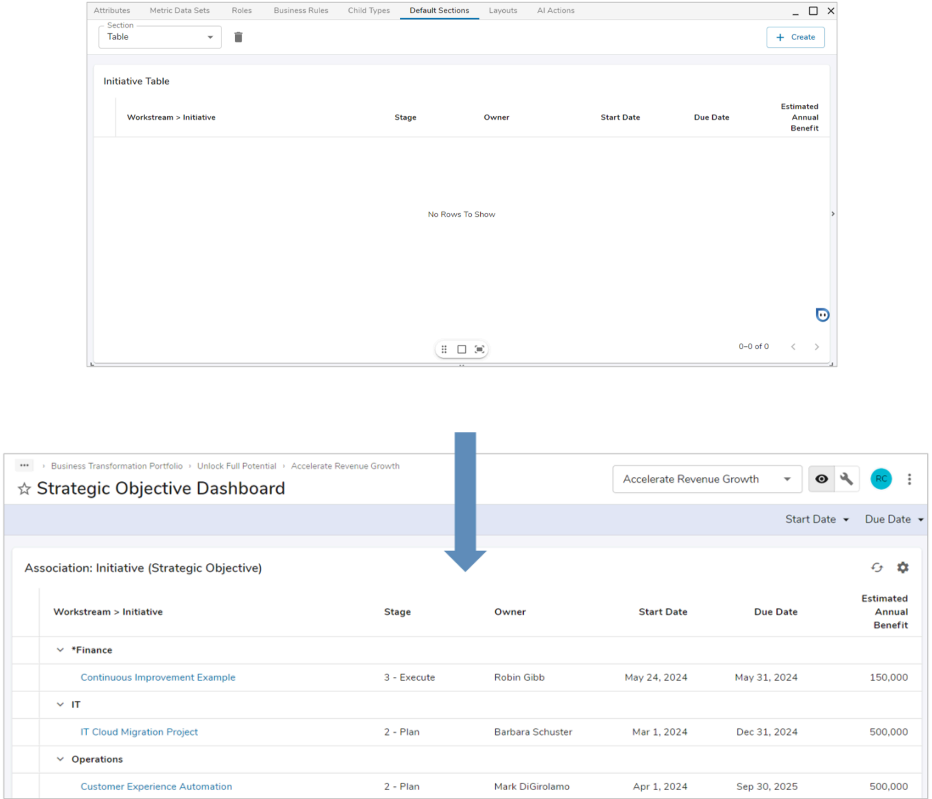
11 January 2025

Contents

App Admin: Default Association Tables

Summary

- Previously, Shibumi introduced the ability to define default work item Table, Board, and Import/Export sections to help streamline configuration. When any of these sections are added to a Layout, Dashboard or Presentation, the configured Default is applied.
- App Admins took full advantage of these Default Sections, but have requested the same capability for Association Tables.
- Now, when adding an Association Table, Shibumi will use the Table default configuration from the associated template. For example, when adding an Association Table displaying a list of Initiatives and their Strategic Objective, the configuration of the Table will match the default Table definition from the Initiative template.



Applicable to

- Template Defaults, Association Table Sections

Set up

- On a Template, open the Data Panel and select the 'Default Sections' tab. Select the 'Create' button and choose the Table option.
- Configure the default Table section as desired, Publish the Template.

AI Recommend: Avoid duplicate recommendations

Summary

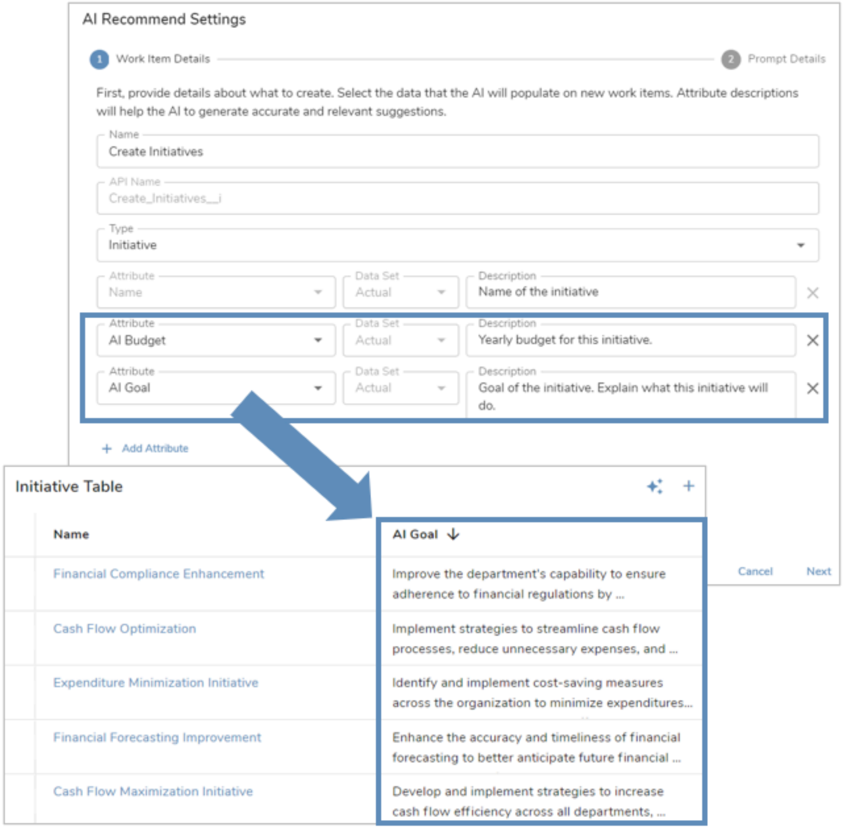
- Previously, the AI Recommend capability prevented recommending duplicates of existing work items.
- This initial capability was accomplished by comparing names of work items. However, our recommendations could still be duplicates with slight variations to the name. We needed to provide additional intelligence to AI Recommend to help avoid the duplicates.
- Now, in addition to checking for duplicate names, AI Recommend will also look at other attribute values to ensure unique recommendations.

Applicable to

- AI Recommend

Set up

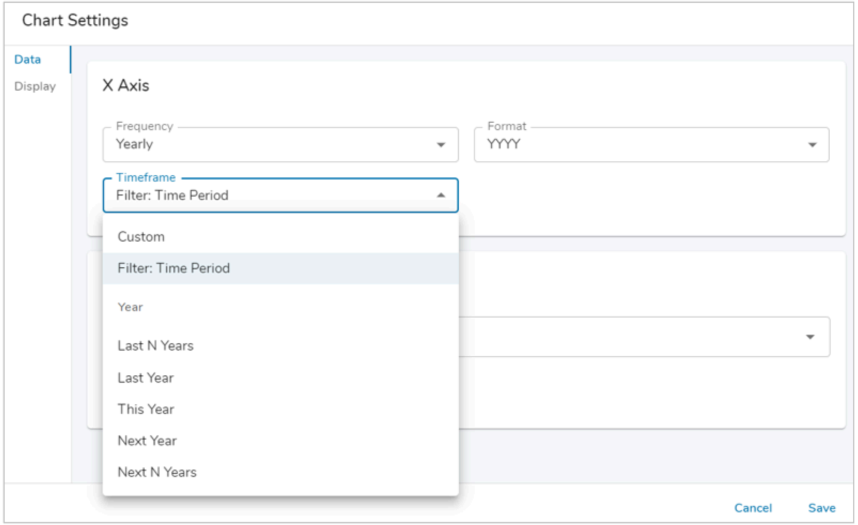
- No new setup required, follow the previously covered setup to configure AI Recommend within your solution.



Metric Timeframe Chart: Preset timeframe options

Summary

- Previously, when configuring Metric Timeframe Charts, App Admins had the ability to point to a page filter or to define a Timeframe based on a custom date range.
- For other areas in the product where date ranges are defined, we have provided preset timeframe options (e.g., This Year, Last Year, Next Year, etc.).
- Now, when configuring Metric Timeframe Charts, App Admins can additionally select from various preset options for the Timeframe.



Applicable to

- Metric Timeframe Charts

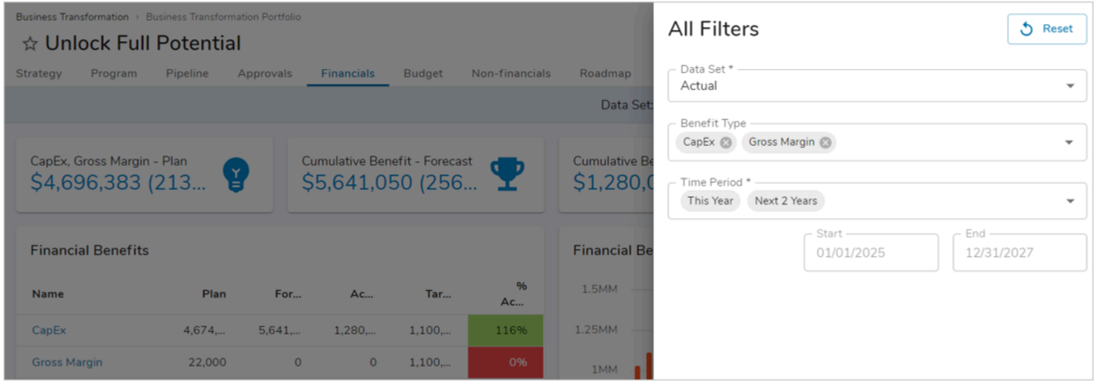
Set up

- On a Layout, open the Add Section dialog and select Chart from the left panel. Click on the Metric option under the Timeframe category.
- Open the settings dialog. On the Data tab, configure the X-axis Frequency and choose one of the available preset options for the Timeframe. Configure the rest of the Chart as desired, Publish.

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 availabe for the Timeframe selection.

Page Filter Panel



Summary

- Previously, users could filter the content on their page using the Page Filter bar.
- Especially when there were a lot of page filter options, the Page Filter bar could become quite crowded and often required horizontal scrolling to let users see all the filters.
- Now, by clicking on a filter icon, users can open the Page Filter Panel to see (and set) the filters.

Applicable to

- Page Filters, Templates, Dashboards

Set up

- No additional setup required, the Page Filter Panel will auto-enable once the Page Filter bar has been toggled on.

Notes

- Selecting the 'Reset' button on the Page Filter Panel will reset all filter values to their Default, and will clear those without a Default.
- The Page Filter Panel's icon will display a number adjacent to indicate the count of Page Filters which have values selected to ensure that users are aware when the content on the page is being filtered.
- During configuration, Page Filters can easily be added, edited, removed, and rearranged from the Page Filter Panel.

Advanced Sunset Notice

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

- Effective with Release 225 (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.**