

222.1-4 & 223.0 Release Notes

11 January 2025

Contents

222.1-4

Issue Resolutions

- Can't save new Set Value / URL call / Send Notification Business Rules
- Business Rules are retaining the previous definitions when selecting a new action
- Business Rules are failing due to inserting oversized action names into audit table
- On Date Business Rules not accepting calculated date values

223.0

Enhancements

- App Admin: Default Association Tables
- AI Recommend: Avoid duplicate recommendations
- AI Recommend: Processing indicator displays when recommendations are being retrieved
- Metric Timeframe Chart: Preset timeframe options
- Page Filter Panel

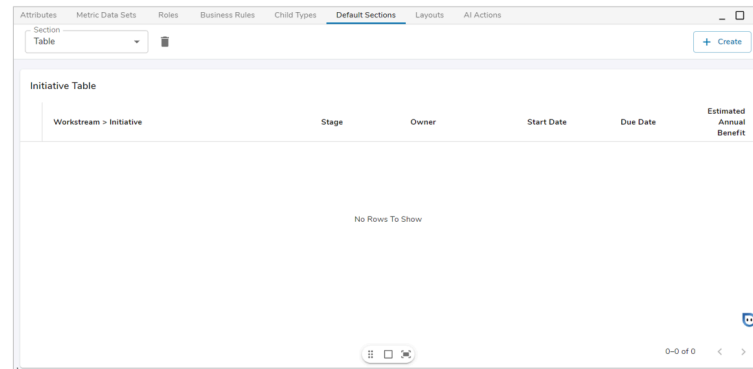
Advanced Sunset Notice

- Metric Lists and Work Item Lists will no longer be available in the Add Section dialog with Release 225.0 (anticipated Feb 2025)

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.

The screenshot shows the 'Strategic Objective Dashboard' with a table titled 'Association: Initiative (Strategic Objective)'. A blue arrow points from the 'Default Sections' configuration window above to this table. The table has columns: Workstream > Initiative, Stage, Owner, Start Date, Due Date, and Estimated Annual Benefit. The data is organized into sections: Finance, IT, and Operations.

Workstream > Initiative	Stage	Owner	Start Date	Due Date	Estimated Annual Benefit
*Finance					
Continuous Improvement Example	3 - Execute	Robin Gibb	May 24, 2024	May 31, 2024	150,000
*IT					
IT Cloud Migration Project	2 - Plan	Barbara Schuster	Mar 1, 2024	Dec 31, 2024	500,000
*Operations					
Customer Experience Automation	2 - Plan	Mark DiGirolamo	Apr 1, 2024	Sep 30, 2025	500,000

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.

AI Recommend Settings

1 Work Item Details 2 Prompt Details

First, provide details about what to create. Select the data that the AI will populate on new work items. Attribute descriptions will help the AI to generate accurate and relevant suggestions.

Name
Create Initiatives

API Name
Create_Initiativ..._j

Type
Initiative

Attribute Name Data Set Description
Name Actual Name of the initiative

Attribute Data Set Description
AI Budget Actual Yearly budget for this initiative.

Attribute Data Set Description
AI Goal Actual Goal of the initiative. Explain what this initiative will do.

+ Add Attribute

Initiative Table

Name	
Financial Compliance Enhancement	AI Goal ↓
Cash Flow Optimization	Improve the department's capability to ensure adherence to financial regulations by ...
Expenditure Minimization Initiative	Implement strategies to streamline cash flow processes, reduce unnecessary expenses, and ...
Financial Forecasting Improvement	Identify and implement cost-saving measures across the organization to minimize expenditures...
Cash Flow Maximization Initiative	Enhance the accuracy and timeliness of financial forecasting to better anticipate future financial ...
	Develop and implement strategies to increase cash flow efficiency across all departments, ...

Cancel Next

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.

Chart Settings

Data

Display

X Axis

Frequency: Yearly

Format: YYYY

Timeframe: Filter: Time Period

Custom

Filter: Time Period

Year

Last N Years

Last Year

This Year

Next Year

Next N Years

Cancel 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.

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.

The screenshot shows a dashboard interface for 'Business Transformation' with a 'Page Filter Panel' overlay. The dashboard includes a navigation bar with tabs for Strategy, Program, Pipeline, Approvals, Financials, Budget, Non-financials, and Roadmap. The main content area displays financial metrics and a table of 'Financial Benefits'. The 'Page Filter Panel' on the right contains the following settings:

- Data Set:** Actual
- Benefit Type:** CapEx, Gross Margin
- Time Period:** This Year
- Start:** 01/01/2025
- End:** 12/31/2027
- Reset:** Button

Name	Plan	For...	Ac...	Tar...	% Ac...
CapEx	4,674,...	5,641,...	1,280,...	1,100,...	116%
Gross Margin	22,000	0	0	1,100,...	0%

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

Summary

- 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 added as new sections 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.**

