shibumi

225.0 Release Notes

8 February 2025

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Enhancements

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- AI Recommend: Include Associations when creating work items

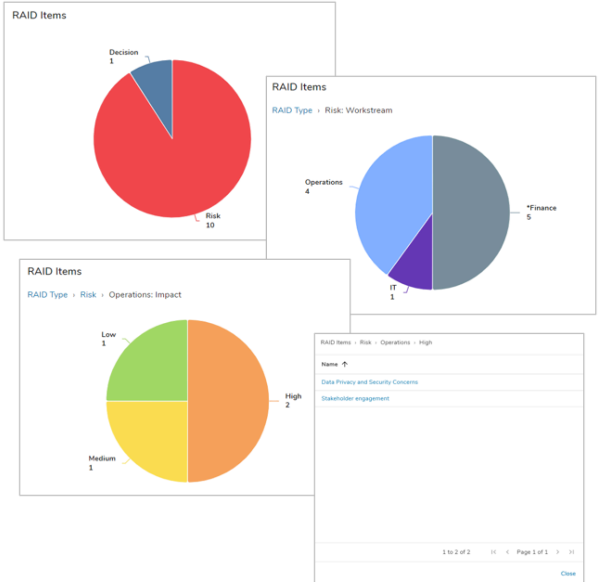
Issues

- Admin-only attributes are displaying as "unknown" for non-admin users
- Safari Only: Pick List attributes in Edit Forms cause the page to hang

Sunset Notice

- Metric Lists and Work Item Lists are no longer be available in the Add Section dialog

Pie/Donut Chart: Drilldown



Summary

- Previously, clients have included Pie and Donut charts in their solutions to show contributions by categories. E.g., a pie chart could display Count of RAID Items by Type.
- While these charts make it easy to identify which categories are providing the greatest and least contributions towards the total value, we did not provide a method to further investigate the data.
- Now, drilldown is provided on all Pie/Donut Charts and, by default, will display a table of items based on the selected slice. Even better, the drill down can be multi-layered to provide increasingly more granular understanding of the data.

Applicable to

- Pie/Donut Chart

Set up Group By Levels

- Open the Settings dialog & navigate to the Drill Down tab. Select the '+ Add Group By' option.
- In the Attribute field, choose from an Association, Checkbox, or Picklist. Add additional Group By's if desired. Save.

Notes

- If no Group By's are configured, selecting a slice on the Pie/Donut Chart will display a table listing the work items within the slice.
- If Group By levels are defined, a breadcrumb trail is displayed representing the previous groups and the current selection.
- Selecting a slice on the final Group By will display a table listing the work items within the slice.

Outline number sorting within Sidebar Navigation

Summary

- Previously, the Sidebar Navigation Tree sorted and displayed work items alphanumerically.
- Many clients have included outline numbers in their work item names to establish a clear hierarchical structure.
- However, the Navigation Tree utilizing an alphanumeric sorting method did not order the outline-numbered work items correctly.
- Now, the Navigation Tree uses outline sorting. No additional setup required.

Applicable to

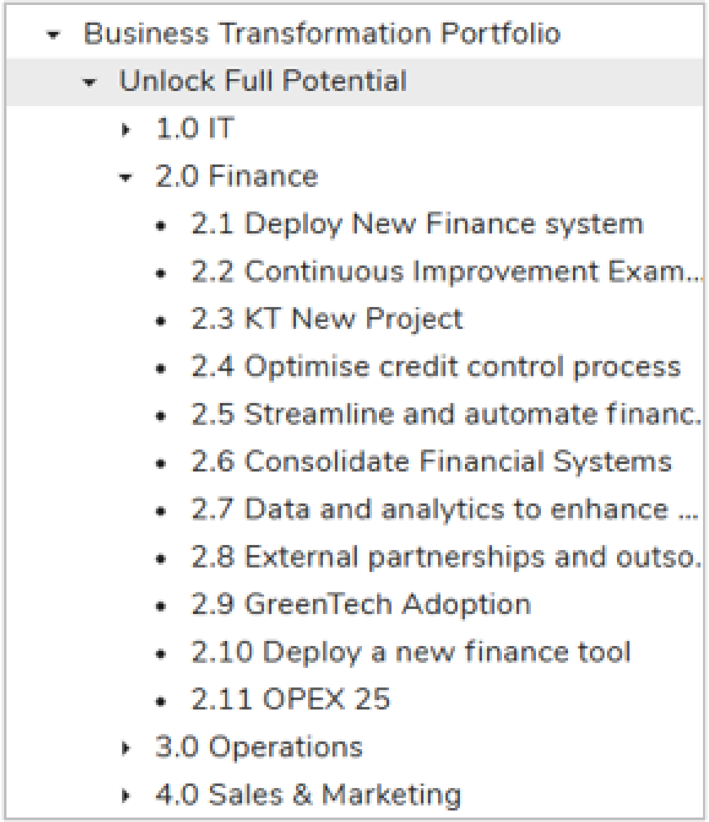
- Sidebar Navigation Tree

Previous alphanumeric sorting

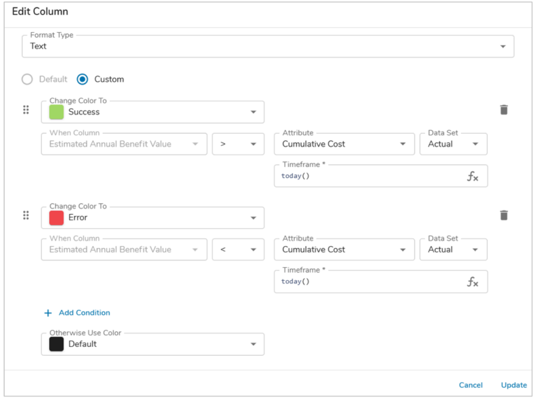
- 1.1 Initiative A
- 1.10 Initiative J
- 1.2 Initiative B

New outline sorting

- 1.1 Initiative A
- 1.2 Initiative B
- 1.10 Initiative J



Tables: Conditional Formatting for Numeric Values



Summary

- Previously, Conditional Formatting for metric or numeric data set columns in Tables was introduced to allow for visualizations based on predefined conditions.
- Clients frequently requested a more dynamic and customizable capability to further tailor the presentation of their data for users.
- Now, custom conditional formatting can be applied to individual metric, numeric, and calculated columns. This capability will be coming soon for metric timeframes.

Applicable to

- Individual metric, numeric, and calculated columns in Table sections

Set up

- In Customize mode on a Table, select to Configure an individual metric, numeric, or calculated column.
- Select 'Enable conditional formatting'.
- Define the Format Type (Background, Text, Icon, Icon/Text) and select the 'Custom' radio button.

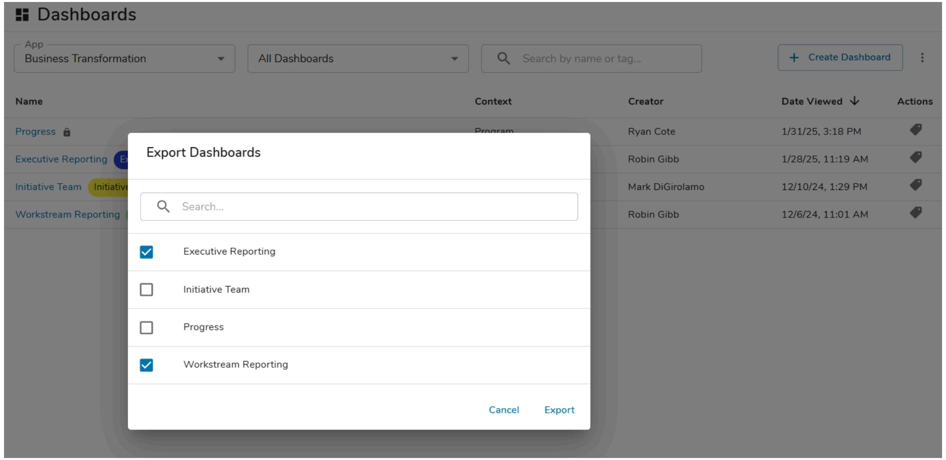
Set up cont.

- Define the first Condition's color/icon and the operator (>, >=, =, !=, <, <=) to compare the column value to another value.
- In the Attribute field, select an attribute/metric or define a static value for comparison. Define a Data Set and Timeframe for any selected Metric attribute.
- Add additional Conditions as desired and re-order as needed.
- Define the Otherwise Use Color/Icon as the comparison default.
- Update, Save and Publish your changes to the Table section.

Dashboard Central: Export/Import Dashboard

Summary

- Previously, Dashboard Central was introduced to provide a centralized inventory of Dashboards.
- A limitation in the Dashboard Central page was the inability to move dashboards from one app to another which made it difficult to introduce new or enhanced dashboards to an app.
- Now, App Admins can export Dashboards individually or as a collection. The exported Dashboards can then be imported, allowing App Admins to update their solutions with a new or enhanced set of Dashboards.



Applicable to

- Dashboard Central, App Admins

Set up

- As an App Admin on the Dashboard Central page, select the More Actions menu. Choose Export or Import.
- Export: Select the Dashboard(s) to export as a single file.
- Import: Choose a Dashboard file to import into the current App.

Notes

- App Admins can export Dashboards they have access to (Public Dashboards they can see, Private Dashboards they hold a role on).
- The Context type of an imported Dashboard must match an existing template in the solution, otherwise the import will fail.
- Imported Dashboards will initially be set to Private and the importer will be assigned as the Owner role on each.

Sunset Notice

<u>Summary</u>

- Effective this Release (225.0)
- Metric Lists and Work Item Lists are no longer 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 are no longer 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 View sections.**