227.0 Release Notes

08 March 2025

Contents

Enhancements

- Save as Dashboard
- Table Custom Conditional Formatting: Timeframe Columns
- Column and Stacked Column Charts: Drilldown
- Functions to return start and end dates of fiscal calendar month, quarter, and year
- Function to return the count of weeks between two dates
- Change password reset timeout to 30 minutes

Issue Resolutions

- AI Recommend: Error when trying to generate dataset-enabled attribute values
- Usernames with commas show blank in Tables
- Currency symbols are displayed in Charts when they used to be hidden
- On dashboards, Table rows don't resize properly when the Row Height setting is adjusted
- Charts break when you delete a template or association type
- One broken chart on a Tab prevents all other charts on the Tab from saving

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Save as Dashboard

Summary

- Previously, Dashboards were introduced to provide App Admins the ability to configure persona-specific dashboards for their solution.

- However, individuals often have unique preferences on how content is filtered and displayed, while also expressing the need for the inclusion of custom visualizations that were not supported on Dashboards.

- For example, many PMO dashboards include a Roadmap tab which typically contains a Gantt section (Custom Visualization). The inclusion of a Gantt is critical to displaying activities and milestones and is used for scheduling and prioritization meetings.

- Now, with the Save As Dashboard capability, **all users** can instantly create a Dashboard using the pre-defined layout of a Work Item, this includes applying Page Filter values as defaults on the Dashboard. Users can further configure the newly created Dashboards. Previously unsupported sections (those not available from the Add Section dialog) are visible but their configuration cannot be changed.

Applicable to

- Dashboards, Work Items
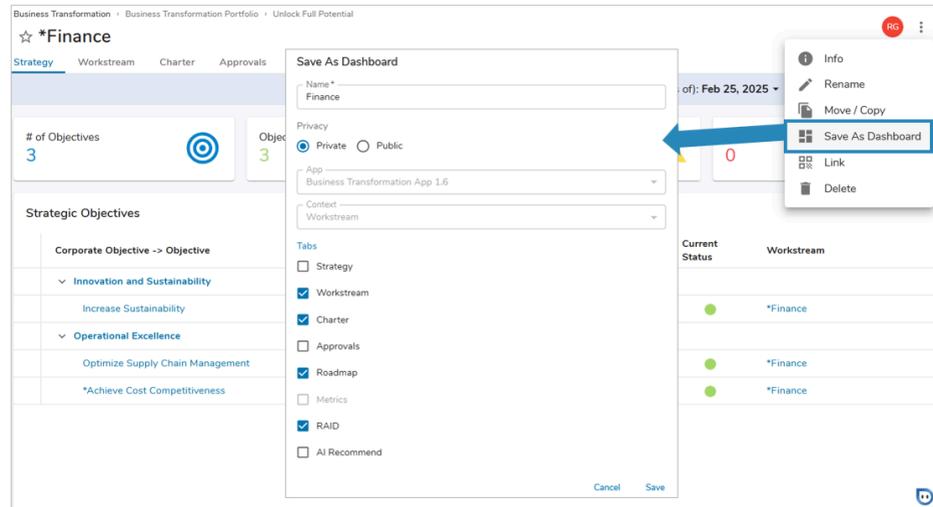
Set up

- On a Work Item, select the 'More Actions' icon in the top right of the page. Choose the 'Save As Dashboard' option from the drop down.

- The Save As Dashboard dialog will appear with Dashboard options.

- On the Save As Dashboard dialog, define the new Dashboard Name, Privacy, and Tabs to be included from the Work Item (only currently visible Tabs will be options).

- Select 'Save' to create and view the new Dashboard.

- Note: *Upon creation, the Dashboard's Context Filter will be set to the Work Item the Dashboard was created on.*

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Tables: Custom Conditional Formatting for Timeframes

Summary

- Previously, Conditional Formatting for Metric Timeframe columns in Tables was introduced to allow for visualizations based on predefined conditions, providing valuable insight into areas that need attention.
- Clients frequently requested a more dynamic and customizable capability to further tailor the presentation of their data and to easily display trends over time.
- Now, custom conditional formatting can be defined for Metric Timeframe Columns, which aligns with our other Custom Conditional formatting offerings available within individual metric, numeric, and calculated columns.

Applicable to

- Metric Timeframe Columns in Tables

Set up

- In Customize mode on a Table, select to Configure a Metric Timeframe column.
- Select 'Enable conditional formatting'.

Set up cont.

- Define the Format Type (Background, Text, Icon, Icon/Text) and select the 'Custom' radio button.
- 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. If available, define a Data Set. If a Metric, the comparison timeframe will match that of the column.
- Add additional Conditions as desired and re-order as needed.

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Column and Stacked Column Charts: Drill Down

Summary

- Previously, clients have included Charts in their solutions to visualize aggregated data by categories such as Region, Workstream, Lifecycle Stage, or Strategic Objective alignment.

- While these charts make it easy to identify which categories are providing the greatest and least contributions towards the total value, there was no avenue to determine the individual contributions of each work item within a column or column slice.

- Now, drill down is provided on all Column and Stacked Column Charts and, by default, will display a table of items based on the selected column or column slice.

Applicable to

- Column and Stacked Column Charts

Set up

- No setup required, Drill Down is automatically enabled on all existing and new Column and Stacked Column Charts.

- For Stacked Column Charts: The selected slice in the column will be displayed in the drill down dialog's breadcrumb trail.
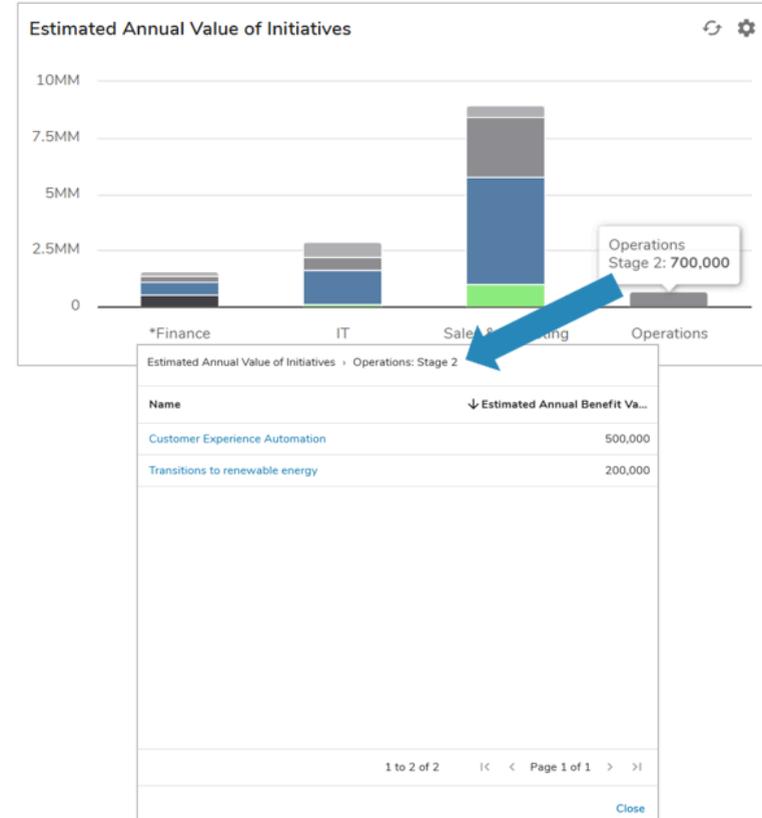
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Fiscal Year Date Functions

Summary

- Previously, Shibumi introduced the ability to set unique Fiscal Year end dates for individual Enterprises with the option to define a Calendar Year or Retail Year.

- Clever App Admins have successfully leveraged complex expressions and rules to determine the number of days or weeks remaining until the end of the month, period, quarter, or year, a common practice in the planning and prioritization of initiatives.

- We are now pleased to introduce new Start and End date functions, designed to simplify the process and empower more users to easily determine the number of days or weeks remaining in a given time period.

Applicable to

- All places where the Shibumi Expression Language can be used

Text

`There are {!days(monthEnd(today()), today())} days until the Monthly Report is due.`

Estimated Benefit of Initiatives

$1,550,000

There are 26 days until the Monthly Report is due.

Set up

- Syntax:
  - monthStart(date)
  - monthEnd(date)
  - quarterStart(date)
  - quarterEnd(date)
  - yearStart(date)
  - yearEnd(date)

- 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).

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Function to return the count of Weeks

Summary

- Previously, Shibumi introduced the days() function to return the numer of days between two dates.
- With the introduction of Retail Calendar enterprises and their variance in the display of days/weeks/periods/quarters, a function to determine the count of weeks between two dates was needed.
- For example, a common practice for Retail Clients is to provide initiative updates in the third week of a period.
- Now, the weeks() function can be leveraged to return the number of weeks between two dates by entering an end date and start date. E.g., weeks(endDate__c, startDate__c)

Applicable to

- All places where the Shibumi Expression Language can be used
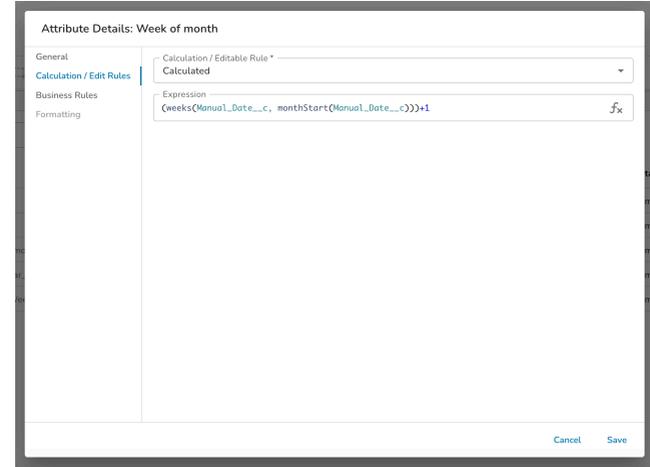
Set up

- Syntax: weeks(date1, date2)
- 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).
- The function will subtract date2 from date1.

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