

# 169.0 Release Notes

8 April 2022

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## Enhancements

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## Issue Resolutions

- Unable to access a new instance named the same as a template

# Enhanced "Edit My Account" Settings Page

## Summary

- Previously, users could adjust their account settings by selecting the Edit My Account option from the Navigation Side Bar.
- As part of our continued progress towards a more modern user experience, we've provided the Edit My Account Settings page with a facelift!
- The new design still provides all of the capabilities available previously but is now presented in a clean and easy to follow format. E.g.,
  - Settings are grouped into individual sections to provide an at-a-glance view that is easier to understand.
  - Each section has an explicit Save button. (This is a pattern you'll see coming soon to all Shibumi form sections!)

## Applicable to

- All users

## Set up

- Select Edit My Account from the user silhouette on the Navigation Side Bar

**Settings**

**Avatar**

Delete Upload New

**General**

First Name\*  
Kim

Last Name\*  
Lewis

Timezone\*  
(GMT-05:00) Eastern Time (US & Canada)

Save

**Change Password**

Old Password

New Password

Confirm New Password

Update

**Homepage**

Solution Consulting & Customer Success Portfolio

Custom homepage: Solution Consulting & Customer Success Portfolio

Save

**Export Settings**

Column Separator  
Comma

Decimal Separator  
Period

Save

**Scheduled Exports**

Log of Hours  
Shibumi Corp · Shibumi Global Sales · Delivery Services Dashboard  
Every 1 month, Last Day, 12:00PM UTC

# Enhanced Participant Window

## Summary

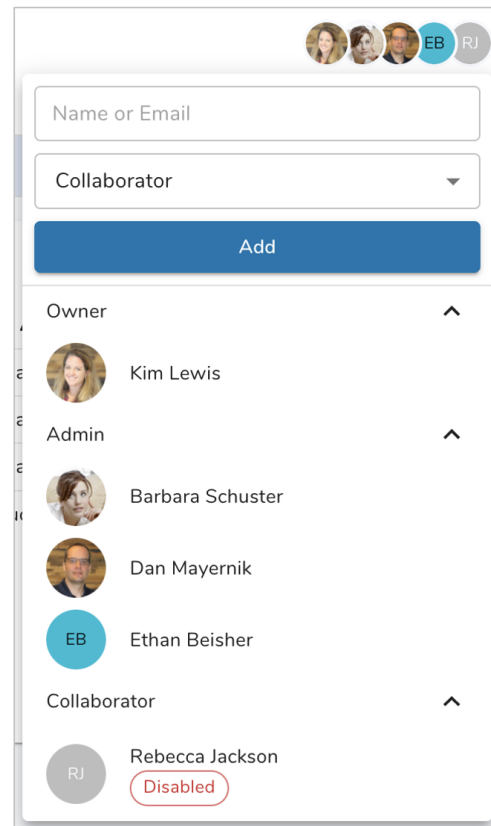
- Previously, the Participant Window displayed all users holding a role on a work item, dashboard, or presentation. From this window, you could manage the user assignments to roles.
- As part of our continued progress towards a more modern user experience, we've provided the Participant Window with a facelift!
- The new design still provides all of the capabilities available previously but is now presented in a clean and easy to follow format. E.g.,
  - An Add button spanning the width of the Participant window replaces the small "+" button that was previously available.
  - Avatars are displayed to the left of the names to help with quick identification of participants.
  - Disabled accounts are more obviously tagged. (In this situation, the account is still assigned to the role but the user cannot access the item until their account is re-enabled.)

## Applicable to

- All work items, dashboards, and presentations

## Set up

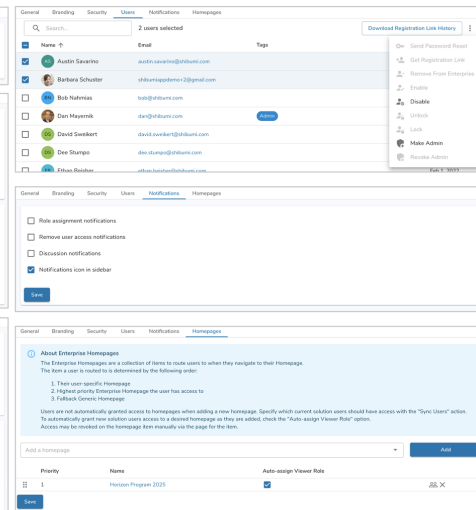
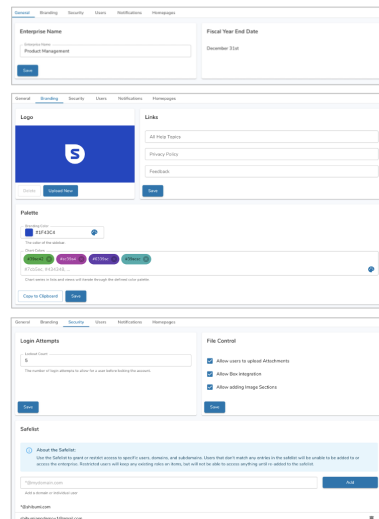
- Click on the Participant Window user avatars in the upper right corner of any work item, dashboard, or presentation.



# Enhanced Enterprise Administration Tabs

## Summary

- Previously, Enterprise Administrators could manage their enterprise configuration settings by selecting the Enterprise Administration option from the Navigation Side Bar.
- As part of our continued progress towards a more modern user experience, we've provided the Enterprise Administration tabs with a facelift!
- The new design provides all of the capabilities previously available but is now presented in a clean and easy to follow format. E.g.,
  - The Settings tab has been renamed "General". From this tab you can rename your enterprise and can view the FY End Date defined for the enterprise.
  - The Custom Branding tab has been renamed "Branding" and no longer includes a toggle to display Branding settings (now they are always available).
  - A new "Security" tab replaces the Whitelist tab and includes: the Login Attempts setting, File Control (previously: "Attachments") settings, and Safelist (previously: Whitelist) settings.
  - The User tab includes minor changes - e.g., sort using the column headers, take actions on users by selecting the user and then selecting options from the action menu at the top right of the tab.
  - The Homepages tab now includes instructional text at the top of the tab.
  - Individual sections now have explicit Save buttons. (This is a pattern you'll see coming soon to all Shibumi form sections!)



## Applicable to

- Enterprise Administrators

## Setup

- Select Enterprise Administration from the user silhouette on the Navigation Side Bar

# New Custom Section: Workplan Gantt

## Summary

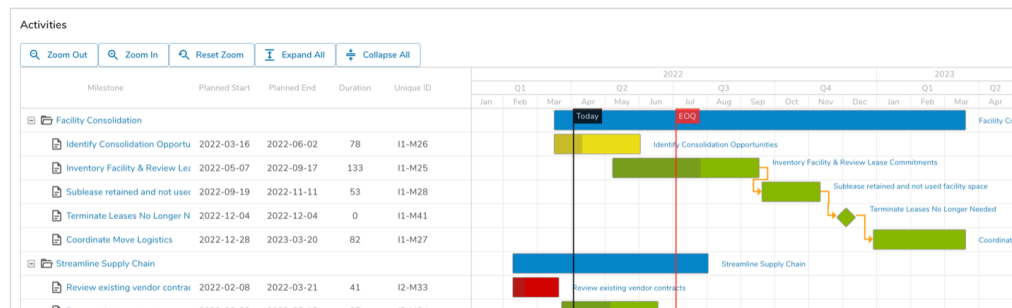
- Previously, you could toggle to a Gantt Chart view from any Shibumi list or view section that contained the OOTB Start and End dates.
- App Admins wanted to be able to use custom dates in a Gantt chart and wanted more capability than the Gantt from the list/view toggle provided.
- Now, a Workplan Gantt section is available. In addition to visually depicting the milestones and durations of tasks, the Workplan Gantt allows you to:
  - Adjust item dates or percentage complete values directly from the Gantt
  - Display/add/remove dependencies between items
  - Open the preview pane to view and edit additional detail about the item
  - Add additional items (e.g., milestones) directly from the Gantt
- Filtering for the Workplan Gantt is available using page-level filters or with the addition of a Filter section.

## Applicable to

- Template Tabs, Dashboards and Presentations

## Set up

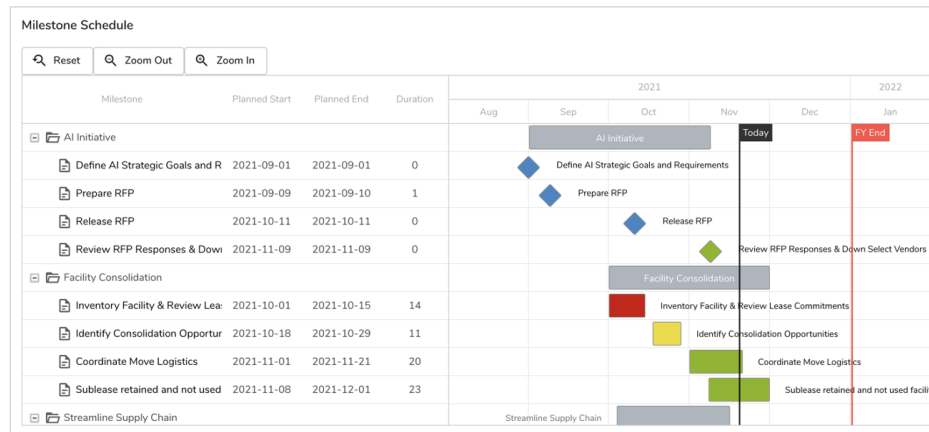
1. On a template tab, dashboard or presentation, from the Layout edit mode, click Add Section.
2. Select the Category of the Workplan Gantt Chart section (this is configurable but is typically: Visualizations).
3. Click on the Workplan Gantt Chart option to add it to the layout.
4. Click on the Settings gear in the top right corner of the section to open the Settings modal.
5. Modify the settings to define the behavior of the Workplan Gantt Chart.



# New Custom Section: Gantt

## Summary

- Previously, you could toggle to a Gantt Chart view from any Shibumi list or view section that contained the OOTB Start and End dates.
- App Admins wanted to be able to use custom dates in a Gantt chart and wanted more capability than the Gantt from the list/view toggle provided.
- Now, a Gantt section is available. In addition to visually depicting the milestones and durations of tasks, the Gantt section allows you to adjust item dates directly from the Gantt.
- Filtering for the Gantt is available using page-level filters or with the addition of a Filter section.



## Applicable to

- Template Tabs, Dashboards and Presentations

## Best Practice Recommendation

- The Gantt section is available and fully supported but the Workplan Gantt has a richer set of functionality. Future Gantt enhancements will be applied to the Workplan Gantt and are not guaranteed to be applied to this Gantt section.

## Set up

1. On a template tab, dashboard or presentation, from the Layout edit mode, click Add Section.
2. Select the Category of the Gantt Chart section (this is configurable but is typically: Visualizations).
3. Click on the Gantt Chart option to add it to the layout.
4. Click on the Settings gear in the top right corner of the section to open the Settings modal.
5. Modify the settings to define the behavior of the Gantt Chart.

# New Custom Section: Filter

## Summary

- Previously, you could toggle to a Gantt Chart view from any Shibumi list or view section that contained the OOTB Start and End dates. Any filters defined for the list or view section were also applied to the Gantt Chart view.
- App Admins wanted to be able to use custom dates in a Gantt chart and wanted more capability than the Gantt from the list/view toggle provided. Shibumi has introduced two custom Gantt sections to address these requirements. However, neither Gantt section provided a filter capability on its own.
- Now, there are two options for filtering the custom Gantt sections: using Shibumi's page-level filtering capability or including a custom Filter section.

## Applicable to

- Gantt and Workplan Gantt custom sections included on template tabs, dashboards, or presentations

The screenshot displays the 'Milestone Filter' configuration panel. It includes the following elements:

- Initiative:** A text input field containing the word 'Consolidation'.
- Milestone:** An empty text input field.
- Date Range:** A horizontal timeline with markers for Sep '21, Oct '21, Nov '21, Dec '21, Jan '22, Feb '22, and Mar '22. A blue dot is positioned at Dec '21.
- Status:** A set of three buttons: 'On Track' (active), 'Issues', and 'Off Track'.
- Corporate Objectives:** A set of three buttons: 'Quality' (active), 'Productivity', and 'Expense'.

## Set up

1. On a template tab, dashboard or presentation, from the Layout edit mode, click Add Section.
2. Select the Category of the Filter section (this is configurable but is typically: Visualizations).
3. Click on the Filter option to add it to the layout.
4. Modify the settings to define the filter options available in the Filter section.



# New Custom Section: Chart

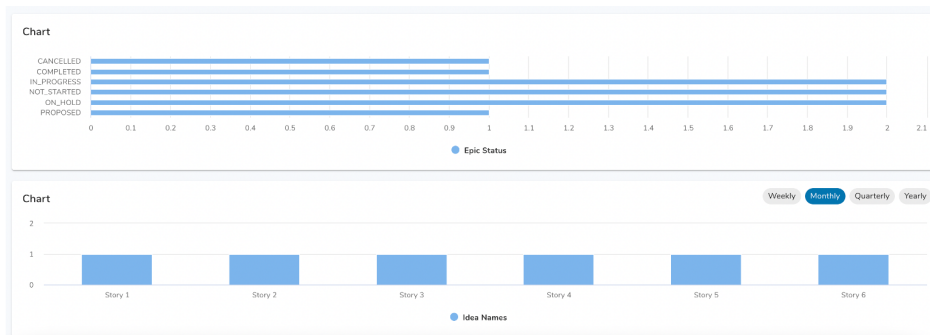
## Summary

- Previously, you could toggle to a Chart view from any Shibumi list or view section (assuming the App Admin had configured the section to support Charting).
- While some configuration options were exposed, App Admins wanted even greater control over chart configuration.
- Now, a dynamic custom Chart section is available that provides the following types of charts:
  - Column
  - Line
  - Bar
  - Stacked Bar
  - Area
  - Stacked Area
- In addition to the variety of charting options, this custom section allows you to configure the Chart colors based on a grouped picklist attribute.
- You can also filter the Chart section using page-level filtering.

## Applicable to

- Template, Dashboard and Presentation

For Shibumi Customer and Partner Use Only.



## Set up

1. On a template tab, dashboard or presentation, from the Layout edit mode, click Add Section.
2. Select the Category of the Chart section (this is configurable but is typically: Visualizations).
3. Click on the Chart option to add it to the layout. Note: you cannot set a custom section to Auto Height so must define the static real estate to be used by the Chart section.
4. Click on the Settings gear in the top right corner of the section to open the Settings modal.
5. Modify the settings to define the behavior of the Chart

# Resolved Issues

Release		#	Issue
169.0	!	8448	Unable to access a new instance named the same as a template