

150.1 & 151.0 Release Notes

7 May 2021

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150.1

Issue Resolutions

- Locked Presentation Slides do not show section names

151.0

Enhancements

- Introduction of the Table section
- Introduction of the Export/Import section
- Ability to bulk delete notifications
- Participant settings removed from Templates
- Navigation settings migrated from Enterprise to Apps

Issue Resolutions

- Stacked bar chart values aren't showing consistent labeling with metrics
- Priority does not save in Settings dialog in enterprises with new UI enabled
- Can't change a metric's target direction in enterprise with new UI enabled
- Business Rule Start Date "Out of Range"

Table Section

Summary

- Previously, tabular data could only be viewed within a List or View.
- Lists and Views are optimized for editing data and providing design customization options, but when the volume of records retrieved to lists/views was high, the section load time performance degraded.
- Now, large amounts of data can be viewed through our extremely performant, paginated, read-only Table section.

Applicable to

- Sections, Table Section

Set up

- On a layout, click Add Section. Select the Table option from the left panel. Choose the template representing the type of work items to include in the Table.
- To configure the Table, click the settings gear in the upper right corner and select Customize.
- Click on the Add Columns panel on the right side of the section to add attributes, metrics or roles.

For Shibumi Customer and Partner Use Only.

Name	Workstream	Overall Score	Alignment	Total Savings	Total Costs	Complexity	Stage	Submitted
Enhance Recording and Categorizing Expen...	Finance	78%	60%	63,360	0	2 - Medium	1 - Idea	Apr 27, 2021
Workflow for payments	Finance	81%	72%	120,000	0	2 - Medium	3 - In Progress	Apr 27, 2021
Facilitate Human Resources Related Queries...	HR	74%	40%	64,800	0	2 - Medium	1 - Idea	Apr 26, 2021
Improve Helping Employees with Internal Pr...	HR	73%	40%	174,960	0	2 - Medium	1 - Idea	Apr 26, 2021
Organize Preparing and Amending Docume...	HR	71%	44%	62,208	0	2 - Medium	1 - Idea	Apr 26, 2021
Organize Updating Employee Records	HR	66%	28%	25,920	0	2 - Medium	1 - Idea	Apr 26, 2021
Personalize Quarterly Training Curriculum	HR	72%	52%	38,880	0	3 - High	1 - Idea	Apr 26, 2021
Streamline Quarterly Training Of Employees	HR	72%	48%	90,720	0	2 - Medium	2 - Pipeline	Apr 26, 2021
Adjust Preparing and Amending Documents	HR	70%	80%	24,300	0	3 - High	1 - Idea	Apr 23, 2021
New Customer Onboarding Welcome Emails	Sales	61%	72%	6,480	0	2 - Medium	1 - Idea	Apr 22, 2021
Sales Revenue Reconciliation	Sales	75%	44%	164,160	0	2 - Medium	2 - Pipeline	Apr 22, 2021

Setup (continued)

- Hover over a column header and click the displayed menu icon to configure, pin, and delete columns.

Additional notes

- While there is no ability to in-line edit table contents, work item names, hyperlink attributes, and associations successfully link to their content.
- Full configuration details can be found here:

<https://shibumi.com/support/knowledge-base/configuring-table-sections/>

Export/Import Section

Summary

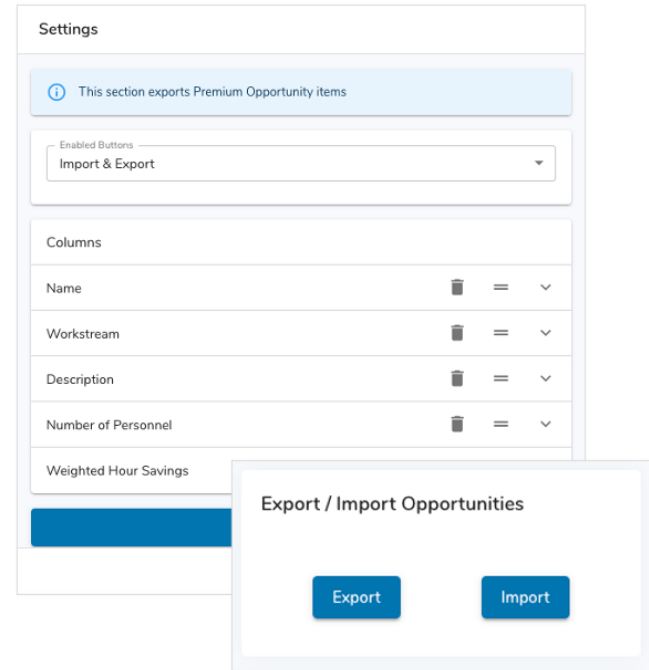
- Previously, Admins had to configure Lists/Views to allow exporting of data from their solutions. To update data, Lists/Views could be bulk edited and data was pasted in from Excel.
- Now, an Export/Import section can be added to layouts to quickly download an Excel file of data and bulk update values on import.

Applicable to

- Sections, Export, Import

Set up

- On a layout, click Add Section. Select the Export/Import option from the left panel. Choose the template representing the type of work items to export/import.
- Click the gear icon in the upper right of the section and select Settings.
- Click Add Column to add a new column. Click the caret to expand a column and edit its configuration. Columns can be editable or locked. Locked columns will be grayed out in the file and any edits to those column values will be ignored on Import. Click Save.



Additional notes

- The export file will contain two system columns that are used to match records on import. These columns should never be modified.
- Full configuration details can be found here:

<https://shibumi.com/support/knowledge-base/configuring-export-import-sections/>

Bulk Delete Notifications

Summary

- Previously, notifications could be individually reviewed and deleted on the Notifications page.
- Users wanted greater ability to review the list of existing notifications and a more efficient way to clear out no-longer-needed notifications.
- Now, notifications are grouped by timeframes and can be bulk deleted from our revamped Notifications page.

Applicable to

- Notifications

Set up

- Click on the bell icon on the Navigation Sidebar to open the Notifications page.
- Click the checkboxes of the notifications to be deleted.
- Select all visible notifications by clicking the checkbox at the top of the list.
- Multi-select using shift+click and ctrl/command+click on your keyboard and mouse.
- Click the delete icon. Confirm.

The screenshot shows a notifications interface with a search bar at the top. Below the search bar, there are two main sections: 'Today' and 'This Week'. Each section contains a list of notifications. The 'Today' section has one notification: 'Opportunity Accounts Payable Reconciliation has been approved for In-Progress' with a timestamp of 11:27 AM and an unchecked checkbox. The 'This Week' section has five notifications, each with a timestamp of 4/29/2021. The first two and last one are checked, while the middle three are unchecked. A 'Delete Selected' button is located at the top right of the notification list.

Timeframe	Notification Text	Timestamp	Selected
Today	Opportunity Accounts Payable Reconciliation has been approved for In-Progress	11:27 AM	<input type="checkbox"/>
This Week	Opportunity Sales Rep On-boarding has been approved for Deployment	4/29/2021	<input checked="" type="checkbox"/>
	Opportunity Workflow for payments has been approved for In-Progress	4/29/2021	<input checked="" type="checkbox"/>
	Opportunity Lead Scoring and Prioritization has been approved for In-Progress	4/29/2021	<input type="checkbox"/>
	Opportunity Streamline Reviewing and Reconciling Transactions has been approved for In-Progress	4/29/2021	<input type="checkbox"/>
	Opportunity Order to Cash Phase 1 has been approved for In-Progress	4/29/2021	<input checked="" type="checkbox"/>

App-Level Navigation Settings

Summary

- Previously, the Navigation Tree was configured by Enterprise Administrators at the enterprise level.
- App Admins could not control how their solution appeared in the Navigation Sidebar unless they were given enterprise admin privileges.
- Now, navigation settings have been moved to the app level so App Admins can easily configure Navigation Trees for their solutions.

Applicable to

- Navigation Tree, App Administration

Set up

- On the App Details page, click on the new Navigation tab.
- Existing navigation tree settings will be present.
- To add a new node to the Navigation Tree, click the Add button.
- Select the Template to display, whether to display only active instances or all instances, and optionally enter a group label for those instances.
- Refresh the page to see changes in the Navigation Sidebar.

XYZ Corp 2023

Templates Roles Sections **Navigation**

+ Add To Navigation Tree

Template	Show	Group Label	Actions
BT Country (BT_Country__t)	Active	Countries	
BT Initiative (BT_Initiative__t)	Active		
BT Program (BT_Program__t)	All		
BT Workstream (BT_Workstream__t)			
EPMO (EPMO__t)			

Add to Navigation Tree

Template *

Show *

Group Label (optional)

Cancel Create

Removal of Template Participants

Summary

- Previously, we introduced the App Admin role to enable solution administrators to quickly gain access to all solution templates.
- The Template Admin role still existed on templates, however, causing confusion as to which role was required to access a solution.
- Now, all participations have been removed from templates. Access is centrally managed at the app level.

Applicable to

- App Administration, Templates

Additional notes

- No set up required.
- Existing Template Admins that do not have App Admin access will no longer have access to templates.

The screenshot displays the 'Premium Opportunity' interface for 'XYZ Corp 2023'. The main content area is titled 'XYZ Corp 2023' and shows a list of templates under the 'Templates' tab. The list includes columns for 'Name' and 'API Name'. The templates listed are 'Basic Automation Activity', 'Basic Opportunity', 'Basic Program', and 'BT Activity'. A '+ Add Template' button is visible in the top right corner of the list. The interface also shows a navigation menu with 'Opportunity Summary', 'Details', 'Activities', 'History', 'Execution Tracking', and 'Workflow'. A blue box highlights a menu icon in the top right corner of the interface.

<input type="checkbox"/>	Name	API Name
<input type="checkbox"/>	Basic Automation Activity	Basic_Automation_Activity__t
<input type="checkbox"/>	Basic Opportunity	Basic_Opportunity__t
<input type="checkbox"/>	Basic Program	Basic_Program__t
<input type="checkbox"/>	BT Activity	BT_Activity__t

Resolved Issues

Issues

Release		#	Issue
150.1	*	7807	Locked Presentation Slides do not show section names
151.0	*	7756	Priority does not save in Settings dialog in enterprise with new UI enabled
	*	7783	Can't change a metric's target direction in enterprise with new UI enabled
	*	7778	Stacked bar chart values aren't showing consistent labeling with metrics
	*	7770	Business Rule Start Date "Out of Range"