

154.1 & 155.0 Release Notes

16 July 2021

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- Association line break issue in forms

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155.0

Issue Resolutions

- Choose Existing is broken for attachment sections
- Not Equal To filter excludes blank values for numeric attributes
- Discussion replies appearing out of order in Notifications
- Metric expression clears out when clicking Update on Editability dialog
- Table section showing metric API names
- Renaming a section sometimes doesn't stick
- previousValue not working for an Icon/Name/Value picklist
- Too much padding on association columns in lists/views

Additional Data Sets

Summary

- Previously, Actual and Target were the only available metric data sets.
- App Admins wanted additional data sets in order to have more granularity and flexibility in the data collected for metrics.
- Now, there are six additional metric data sets that can be enabled within an app.

Applicable to

- Data Sets, Metrics, Apps

Set up

- On the App detail page, click on the Data Sets tab.
- Click "Enable Data Set." Select the data set to enable from the dropdown. The name can be edited.
- Click "Enable and Publish App." All templates in the App will be published, so this process may take a long time depending on App size.
- Edit a data set name by clicking the pencil icon in the Actions column. Disable a data set by clicking the trash can icon in the Actions column.

For Shibumi Customer and Partner Use Only.



Additional notes

- Enabled data sets are available everywhere that Actual and Target are available (template data page, metric lists/views, metric charts, metric columns, expressions, GraphQL, etc.).

Enhanced Expression Editor

Summary

- Previously, the Shibumi Expression Editor provided a single-line input.
- When expressions were long, they wrapped within the single line and could become difficult to read.
- Now, our Expression Editor supports multi-line entry and includes color coding to more easily review and edit the content (all while still supporting type ahead and error messaging)!

Applicable to

- Expressions

Additional notes

- No set up required.
- Within expression fields, press enter to see line numbers (this is not available within injected expression fields).
- Expression documentation:
<https://shibumi.com/support/knowledge-base/expressions-overview/>

Metric Actual

Approved Savings - Cumulative as of Jul 31, 2021

Define your expression [?](#)

```
1 - cumulative(  
2 -   sumif(  
3 -     Premium_Opportunity__t, fx  
4 -     onDate(Total_Savings__c, Implementation_Date__c),  
5 -     Stage__c="2 - Pipeline" or Stage__c="3 - In Progress" or Stage__c="4 - Deployed"))
```

```
cumulative(  
  sumif(  
    Premium Opportunity,  
    onDate(Total Savings, Implementation Date),  
    Stage="2 - Pipeline" or Stage="3 - In Progress" or Stage="4 - Deployed")(-)) = --
```

Apply expression

Ability to Lock List/View Filters to Open

Summary

- Previously, List/View filters were collapsed by default and required a click to toggle them open.
- While this behavior preserved real estate for the row content of the list/view, it also resulted in confusion for users who were not aware that the section content was being filtered.
- Now, App Admins can configure Lists/Views to default the filter fields open so that they are always visible to users.

The screenshot shows the 'Settings' interface for a List/View. The 'List options' section is expanded, showing the following options:

- Default filters to open
- Enable report view
- Enable options checkbox on list items

The main view shows a 'Milestones' table with the following columns:

ID	Milestone Status	Name	Description	Total Value	Planned		Actual	
					Start Date	End Date	Start Date	End Date
1	●	Research Options	solicit bids, define selection criteria	0.00	Jun 28, 2021	Jul 9, 2021	Jun 25, 2021	📅
2	●	Down Select Vendors	Selection criteria documented on the RFP site	0.00	Jul 12, 2021	Jul 16, 2021		📅
3	●	Initiate Engagement	Work with selected vendor	250,000.00	Jul 26,	Oct 22,		📅

Applicable to

- Views, Lists

Set up

- On a template or dashboard, click on the settings gear of a List/View and select settings.
- Under List Options, select "Default filters to open."
- Click Save.
- Publish the template.

Export/Import Section Filtering

Summary

- Previously, the Export/Import section exported all instances of the specified template type.
- App Admins wanted the flexibility to limit the exported instances (e.g., to export only items that could be edited so there would be no issues upon import).
- Now, the Export/Import section can be pre-filtered to exclude instances from the export file based off defined criteria.

Applicable to

- Export / Import Section

Set up

- Click on the Settings gear in an Export/Import section and select Settings. Click on the Filters tab.
- In the dropdown, select the attribute to use for the filter.
- Enter a value. Our existing filter language is supported (<, >, =, !=, {!attribute__c}, etc.).
- Click Save.

Export / Import Opportunities Settings

Columns

Filters

i This section exports Premium Opportunity items

Filters

Attribute Name	Value	
Stage	"3 - In Progress"	×
		×

Add Filter

Cancel Save

Additional notes

- If multiple filters are defined, a record is retrieved only when all filter criteria are satisfied.
- Filtering syntax:
<https://shibumi.com/support/knowledge-base/filters/#filter-operators>

Tab Management Controls

Summary

- Previously, tabs were managed by clicking the settings gear in the tab bar to open the Tab Management dialog.
- Now, tab management controls are accessible through the template Action menu.

Applicable to

- Tabs, Templates

Additional notes

- To open the Tab Management dialog, select the Action menu on a template (3 dots in the upper right-hand corner).
- Select Configure Tabs.

The screenshot displays the RPA App interface for a 'Premium Opportunity'. The top navigation bar includes tabs for 'Opportunity Summary', 'Details', 'Activities', 'Execution Tracking', 'Workflow', 'History', '*Config', and '*Metrics'. A dropdown menu is open in the top right corner, showing options: 'Settings', 'Configure Tabs', 'Rename', and 'Move / Copy'. The main content area features a 'Stage Progress' section, four progress indicators (OVERALL SCORE, % ALIGNMENT, EXPECTED ANNUAL B..., BENEFIT REALIZED TO ...), and two summary panels: 'Status' (All on track, by James Joyce on Jun 6, 1905) and 'Details' (Description of the Opportunity, Submission Date: 1905-06-16, Implementation Date: 1905-06-16, Submitted By: James Joyce).

Resolved Issues

Issues			
Release		#	Issue
154.1	*	7942	Association linebreak issue in forms
155.0	*	7920	Choose Existing is broken for attachment sections
	!	7869	Not Equal To filter != excludes blank values for numeric attributes
	*	7962	previousValue not working for an Icon/Name/Value picklist
	*	7944	Discussion replies appearing out of order in notification
	*	7940	Metric expression clears out when clicking Update on Editability dialog
	*	7919	Table section showing metric API names
	*	7809	Renaming a section some times doesn't stick