160.1-2 & 161.0 Release Notes

19 November 2021

Contents

160.1-2

Issue Resolutions

- No labels in Metric View chart

161.0

Issue Resolutions

- Navigation tree breaks during app upgrade when a template is deleted
- Aggregation of metric columns does not work for Variance
- Chart selector shows in the top-left corner of the window
- Pick List icon set by Business Rule does not update when editibility is false

161.0

Enhancements

- Enhanced Edit Layout UX: Distinct Layout modes to configure the section, design the layout, and manage the data
- Auto-height section setting for list, view, rich text & form sections
- Collapse section header white space when no title is present
- Removal of 2-Column Layout
- Page-level filtering on templates and dashboards
- Allow page filters to be used in section header expressions
- toFilter() Function: Ability to resolve values in filter-friendly formats
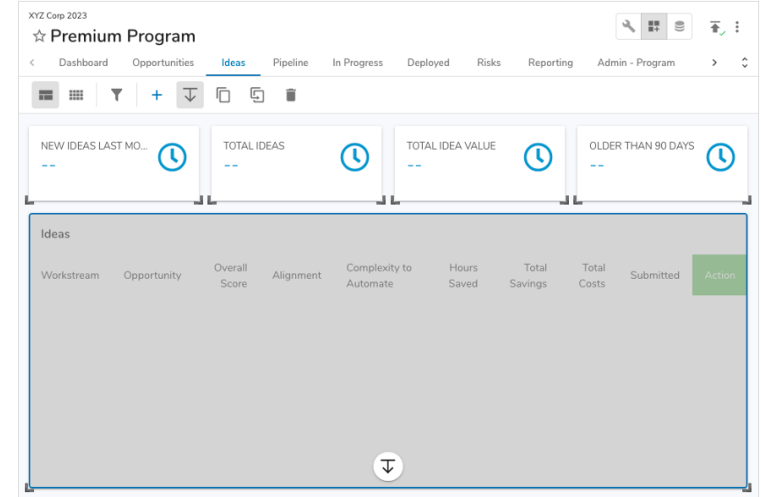
shibumi

Enhanced Edit Layout UX

Summary

- Previously, App Admins scrolled down to the bottom of a template, dashboard, or presentation and clicked the "Edit Layout" button to modify the layout of a page and to configure sections.
- Now, as part of our continued efforts to upgrade the Shibumi UX, we are providing a more intuitive approach with distinct modes to design page layout and configure sections. These edit modes, along with the previously provided ability to edit data, provide a clear separation of purpose to allow greater design & configuration control.

Applicable to

- Templates, Dashboards, Presentations

Set up

- On a template, toggle between Configure, Layout, and Data modes using the buttons in the upper right corner. Configure mode allows you to configure section settings. Layout mode displays a toolbar at the top of the page with controls to adjust the section density, enable the filter bar, add sections, set sections to auto-height, and duplicate/delete/move sections.
- On a dashboard, click the 3-dot Action menu and select Configure to enable the mode toggle buttons. Select Configure or Layout to edit the dashboard. Select Display to

Set up, continued

- preview the dashboard. Select Finish Configuring from the action menu to hide the mode toggles.
- Similar to dashboards, presentations have 3 modes: Display, Configure, and Layout. Layout controls are enabled when in Layout mode.
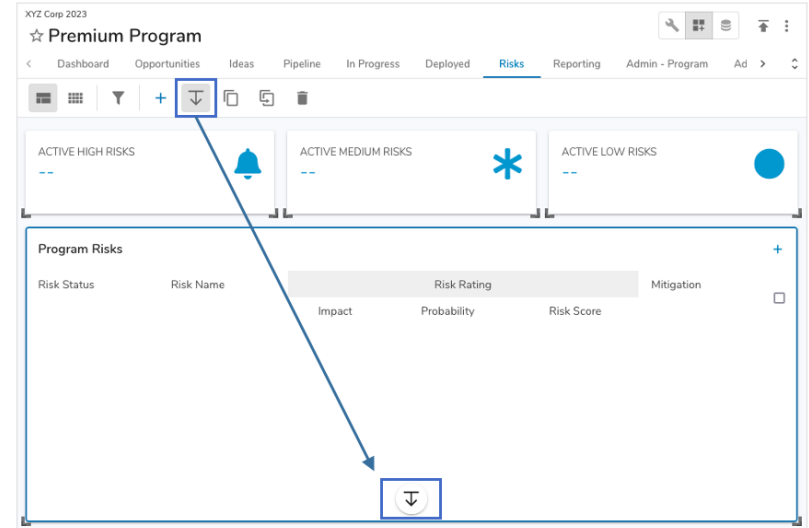
shibumi

Auto-Height Sections

Summary

- Previously, sections could only grow in height when the page layout was set to 2-Column layout.

- 2-Column layout did not allow for the same granularity of configuration as other layout options. To have full control, App Admins wanted the auto-height behavior for Standard and Condensed layouts as well.

- Now, we have introduced an auto-height setting for select sections on Standard and Condensed layouts and have retired the 2-Column layout option.

Applicable to

- Lists, Views, Forms, Rich Text sections

Set up

- On a template, dashboards, or presentation, toggle into Layout mode.

- Select a section that should automatically grow/shrink with content.

- Click the auto-height icon in the layout toolbar. An auto-height adornment will appear on the section.

- Note: the height of the section will increase as needed to show all content, but the minimum height of the section will always be as defined on the layout.

Additional notes

- Layouts previously set to 2-Column mode will automatically convert to Condensed layout with auto-height sections.

- If section content shrinks (e.g., is filtered, toggled to a different visualization, etc.), the section height will reduce, but it will not get smaller than the minimum height defined on the layout.

shibumi

Page-Level Filtering

Summary

- Previously, all filtering was configured at the section-level.
- App Admins wanted to design the page such that all sections reacted to the same filter values.
- Now, page-level filters can be configured on templates and dashboards and tied to sections so all sections respond to the same filters.

Applicable to

- Template Tabs, Dashboards, Tables, Lists, Views

Set up

- On a template tab or dashboard, toggle to Layout mode.
- Click the filter icon in the toolbar to enable the filter bar.
- Click the plus button to add a filter. Select dropdown or date.
- Enter a filter name and optionally edit the API name.
- For a dropdown filter, enter the options to display.
- Use the dynamic filter syntax to tie a section to a filter. For example, in a List/View, enter {!Filter_API_Name__f} into a filter field.

Additional notes

- In this initial release, page-level filters can only be applied to Lists, Views, Tables, and Achievement Cards.
- Section titles can also reference page-level filter values using the dynamic reference syntax {!Filter_API_Name__f}.

shibumi

Ability to resolve values into filter-friendly formats

Summary

- Previously, dynamic filters resolved in formats that were not always conducive to filtering. E.g., App Admins wanted numbers to resolve without commas so filtering would not be impacted.
- With the release of page-level filtering, it became even more crucial to provide a way for dynamic values to be formatted properly in section filters.
- Now, a toFilter() function provides the ability to resolve values into filter-friendly formats.

Applicable to

- All locations where expressions can be defined

Syntax

toFilter(value)

- value: The value can be a constant (i.e., hard-coded value, attribute reference, or page-filter reference) and/or references to metrics. The value argument can also be an expression.

Additional notes:

- Multi-select pick lists will resolve selected options surrounded by double quotes and separated by commas.
- Dates will be formatted as "yyyy-MM-dd".
- Numbers will resolve to the raw numeric value without any formatting.
- Text values will be surrounded by double quotes to allow for exact match filtering.

shibumi

Resolved Issues

Issues

Release		#	Issue
160.2	✳	8221	No labels in Metric View chart
161.0	✳	7535	Pick List icon set by Business Rule does not update when editibility is false
	❗	8189	Navigation tree breaks during app upgrade when a template is deleted
	❗	7790	Chart selector shows in the top-left corner of the window
	❗	5908	Aggregation of metric columns does not work for Variance

shibumi