

175.0 Release Notes

29 July 2022

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Enhancements

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- Ability to configure a section to expand to fit the remaining height of the window
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Issue Resolutions

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- Hover text in stacked bar charts does not always identify what the section represents
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- Dependent associations work on Form sections

Create Form section

Summary

- Previously, new work items could be created by clicking the blue plus button in the upper right corner of a List section.
- Admins had the ability to define which attributes should be included on the Add Item window but could not customize the layout.
- They were also unable to include dependent association fields on the Add Item windows and often wanted this capability.
- Now, Admins can add a Create Form section that will display a command button to create a work item (a List section is no longer required) and the Admin can customize the layout of the form AND can include dependent association fields!

Applicable to

- Create New, Child Types, Associations

Set up

- While in Layout edit mode, click Add Section, and select Create Form.
- Choose from available Child Types or Associations. A section with a button is added.
- Customize the Create Form by clicking on the Settings gear and selecting "Customize Layout." Full Form customization functionality is available.
- Change the button label text from the Settings window.

For Shibumi Customer and Partner Use Only.

Full Ambition
500,000.00

Goal Alignment

Create Initiative

Initiative Name
Modernization of Finance Technology

Function
Finance

Description
Review and identify opportunities for modernization and consolidation of Financial systems. It is anticipated that we will be able to sunset older systems being used

Total Value
250000

Anticipated Achievement Date
Jan 31, 2023

Owner
Kim Lewis

Cancel Create

Additional notes

- After the new item is created, a green notification banner is displayed at the bottom of the screen to announce that an item was successfully created. Click to navigate to the item.
- For Association Create Forms:
 - The Parent Field is automatically added to the section and cannot be removed.
 - Parent Field is searchable and will be restricted to what the user has access to.
 - The Association is linked automatically to the new item.

Create from Navigation Sidebar

Summary

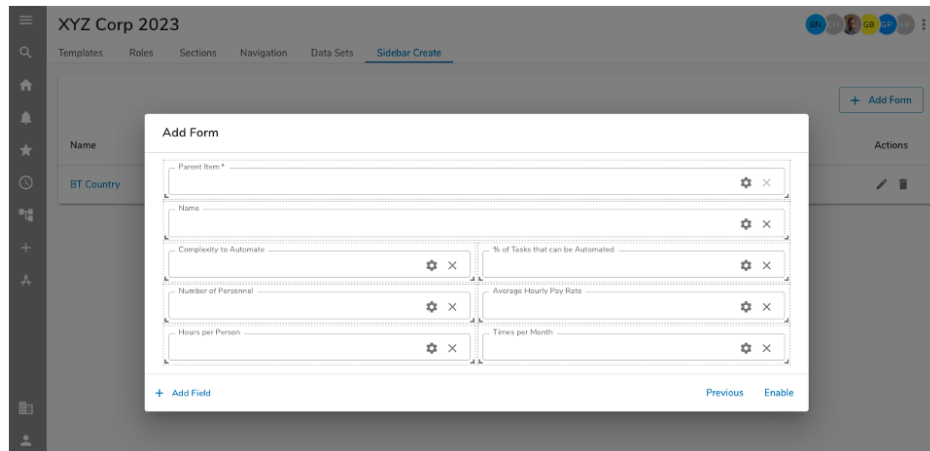
- Previously, the navigation sidebar Create New button could only create top level work items (i.e., items with no parent).
- When users wanted to create any other items, they had to navigate to the specific parent item to create the new instance (e.g., navigate to an initiative to create the child milestone).
- Now, App Admins can provide the ability to create work items at any level of the solution hierarchy from the navigation sidebar and top level work items are created from the App Templates tab.

Applicable to

- Navigation Sidebar, Apps, Forms

Set up

- Select Apps from the Sidebar; open the desired App and navigate to the Sidebar Create tab.
- Click the Add Form button. Choose a template and click Next to configure the Form by adding attributes, headings, etc. and defining the form layout.
- Click Enable to save.



Additional notes

- Parent is a required field and cannot be removed from the Form.
- Field labels and help text are static (i.e., not expressible) for Sidebar Create Forms.
- Once you've enabled a Form, hover over the '+' Create New button on the Navigation Sidebar to see a menu of enabled Forms.
- After the new item is created, a green notification banner is displayed at the bottom of the screen to announce that an item was successfully created. Click to navigate to the item.

Fit to Window Section

Summary

- Previously, App Admins could assign a fixed height or an auto-height option for sections on a layout.
- Some sections could not be set to auto-height, limiting control that App Admins had over the user experience.
- Now, Admins can make any section expand to the remaining height of the window, giving them greater UX control and allowing them to optimize across browser/screen sizes.

Applicable to

- Sections

Set up

- While in Layout edit mode, click on a section.
- On the Layout toolbar, select the Height icon to the right of the Add Section button. Note: the icon display and hover help will change based upon on the currently selected Height setting.
- Select: Fixed Height, Fit to Window, Fit to Content (replaced Auto-Height).

The top screenshot shows the 'Premium Program' dashboard in layout edit mode. A tooltip is visible over the 'Fit to Window' icon in the layout toolbar, showing options: 'Fixed Height', 'Fit to Window', and 'Fit to Content'. The dashboard includes sections for 'NEW IDEAS LAST MONTH', 'TOTAL IDEAS', 'TOTAL IDEA VALUE', and 'OLDER THAN 90 DAYS'. Below these are several data cards for 'Ideas' with columns: Workstream, Opportunity, Overall Score, Alignment, Complexity to Automate, Hours Saved, Total Savings, Total Costs, Submitted, and Action.

The bottom screenshot shows the 'RPA Demo 2023' dashboard. It features a summary row with: 'NEW IDEAS LAST MONTH' (with a plus icon), 'TOTAL IDEAS' (15, with a lightbulb icon), 'TOTAL IDEA VALUE' (\$1.69M), and 'OLDER THAN 90 DAYS' (5, with a sand timer icon). Below is a table of ideas:

Workstream	Opportunity	Overall Score	Alignment	Complexity to Automate	Hours Saved	Total Savings	Total Costs	Submitted	Action
HR	Some new HR item	35%	0%		0	0	0	Jul 8, 2022	
Finance	Enhance Recording and Categorizing Expenses	78%	69%	2 - Medium	1,920	63,300	30,000	May 8, 2022	
HR	Personalize Quarterly Training Curriculum	72%	52%	3 - High	1,440	38,880	30,000	May 7, 2022	
HR	Organize Updating Employee Records	69%	28%	2 - Medium	960	25,920	45,000	May 7, 2022	
HR	Organize Preparing and Amending Documents	71%	44%	2 - Medium	2,304	62,208	60,000	May 7, 2022	
HR	Improve Helping Employees with Internal Processes	73%	43%	2 - Medium	6,480	174,960	30,000	May 7, 2022	
HR	Facilitate Human Resources	74%	43%	2 - Medium	2,400	64,800	30,000	May 7, 2022	

Mobile/Desktop Tab Setting

Summary

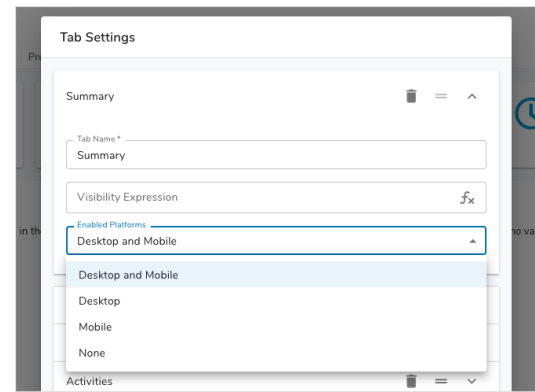
- Previously, all template tabs were displayed on both desktop and mobile devices. Sections automatically snapped into a mobile-mode on a mobile device.
- App Admins wanted the ability to define some tabs as mobile-only or desktop-only, so that they could provide a better experience to users leveraging different devices.
- Now, Admins can define which platforms are enabled for each tab in their solutions.

Applicable to

- Tabs

Set up

- Navigate to a Template and select the Action (three dots) menu in the upper right corner.
- Select the Configure Tabs option.
- Expand a tab to open its configuration settings. In the Enabled Platforms setting, specify which Platform(s) will have the tab available: Desktop and Mobile, Desktop, Mobile, None



Additional notes

- The "None" option has replaced Hidden. All Hidden tabs will automatically convert to this option upon release.
- When a tab is set to Desktop and Mobile, layouts still snap into mobile-mode when on a mobile device,
- When a tab is set to Mobile, sections do not adjust. Layouts will appear exactly as configured on the template.
- All tab visibility logic is still applied. The Enabled Platforms setting determines whether the tab is available on the device. The visibility logic determines whether it will be displayed to the user.

Resolved Issues

Release		#	Issue
175.0	*	8685	Images not loading in presentation present mode
	*	8680	Hover text in stacked bar charts does not always identify what the section represents
	!	8760	Bottom of page is cut off on mobile
	!	4273	Dependent associations work on Form sections