

175.1-3 & 176.0 Release Notes

12 August 2022

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175.1-3

Issue Resolutions

- Tabs display extra white space at bottom of screen when toggling between tabs
- Unable to use bulk edit to create new items
- When using SSO, Shibumi is logging into a blank screen

176.0

Enhancements

- Increase label font size for Form Fields
- Add row grouping to Table section
- Add aggregations to Table section
- Ability to refresh a Table section
- Auto-refresh Table section when updates are made

Issue Resolutions

- Sort templates on Create Top Level Instance dialog

Add Row Grouping to Table Section

Summary

- Previously, Table sections could not be grouped like Lists and Views.
- Admins needed this ability in order to better display their data.
- Now, Tables can be grouped by any column, with multiple groups nesting in a single column. Additionally, the work item Name can be included in the group column for further space-saving.

Applicable to

- Tables

Set up

- On a Layout that contains a Table section, while in Configure mode, select the Table's settings gear and click Customize.
- Drag any columns to the grouping toolbar to add them to the Group column, or click on the column menu icon and select the Group By option. By default, the column will be named Group.
- The item Name will be displayed within the Group column by default. To change this, open the column's Configure dialog and disable the setting.

The image shows two screenshots of the 'RPA Opportunities' table. The top screenshot shows the table in 'Configure' mode with a settings menu open over the 'Overall Score' column. The menu options are 'Configure', 'Pin Column', and 'Group by Alignment'. The bottom screenshot shows the table in 'View' mode with row grouping. The 'Group' column contains hierarchical labels like '> Sales', '> HR', and '2 - Pipeline'. The table columns are: Overall Score, Alignment, Total Savings, Total Costs, Complexity, Implementation, and Submitted.

Workstream > Stage > Name	Overall Score	Alignment	Total Savings	Total Costs	Complexity	Implementation	Submitted
> Sales	84%		1,849,680	505,000			
> HR	74%		1,340,378	845,000			
▼ Finance	82%		1,320,672	491,800			
▼ 2 - Pipeline	81%		300,960	140,000			
Consolidate Automate Payroll Tax Filings	81%	72%	142,560	50,000	2 - Medium	Jul 30, 2022	Mar 20, 2022
Enhance Recording and Categorizing Ex...	78%	60%	63,360	30,000	2 - Medium		May 8, 2022
Strengthen Reviewing and Reconciling T...	70%	52%	95,040	60,000	3 - High		Apr 10, 2022
▼ 3 - In Progress	81%		956,352	306,800			
Automate Envelope Mail Out	69%	44%	55,440	60,000	3 - High		Apr 24, 2022
Consolidate Uber Payments	67%	20%	95,040	30,000	2 - Medium	Aug 3, 2022	Apr 11, 2022
Download Exchange Rate Data	81%	88%	118,800	61,000	3 - High	Jul 3, 2022	Mar 4, 2022
Enhance Invoicing Clients	79%	68%	114,048	26,000	2 - Medium	Aug 17, 2022	May 2, 2022

Set up, continued

- Reorder the grouped columns by dragging them within the grouping toolbar. Sort the group column by clicking on the column header, or sort multiple levels of groups by clicking each column name in the grouping toolbar and holding the shift button.
- Note: end users can access an expand/collapse all setting in the column menu.

Add Aggregations to Table Section

Summary

- Previously, columns in Tables could not be aggregated.
- Admins needed the ability to apply various functions to aggregate tabular data.
- Now, Table columns have an aggregation option that will enable a Total row at the bottom of the table and display subtotals in Group rows when grouping is configured.

Applicable to

- Tables

Set up

- On a Layout with a Table, while in Configure mode, select the Table's settings gear and click Customize.
- Select a column menu from the header row and hover over the Value Aggregation option.
- Aggregation methods for the column's data type will be available. Select an option and Save the section.

RPA Opportunities								
Workstream > Stage > Name	Overall Score	Alignment	Total Savings	Total Costs	Complexity	Implementation	Submitted	On Track
▼ Sales	84%		1,849,680	505,000				
> 1 - Idea	81%		966,480	105,000				
▼ 2 - Pipeline	82%		352,800	165,000				
Automatic Quote Generation	82%	88%	57,600	45,000	2 - Medium	Aug 2, 2022	Feb 10, 2022	<input type="checkbox"/>
Call/Meeting Scheduler	71%	92%	14,400	45,000	2 - Medium	Aug 2, 2022	Apr 15, 2022	<input type="checkbox"/>
Expense Exception Processing	75%	64%	116,640	45,000	3 - High		Mar 7, 2022	<input checked="" type="checkbox"/>
Sales Revenue Reconciliation	75%	44%	164,160	30,000	2 - Medium	Aug 2, 2022	May 2, 2022	<input type="checkbox"/>
> 3 - In Progress	84%		150,000	135,000				
▼ 4 - Deployed	82%		380,400	100,000				
Auto-populate leads across outbound m...	77%	72%	68,400	45,000	3 - High	Apr 22, 2022	Jan 27, 2022	<input checked="" type="checkbox"/>
Lead List Generation	82%	80%	96,000	30,000	2 - Medium	Jan 31, 2022	Dec 1, 2021	<input checked="" type="checkbox"/>
Sales Rep On-boarding	80%	84%	216,000	25,000	3 - High	Apr 12, 2022	Jan 1, 2022	<input checked="" type="checkbox"/>
> HR	74%		1,340,378	845,000				
> Finance	82%		1,320,672	491,800				
Total	84%		4,510,730	1,841,800				

Auto-refresh Table Section & Refresh Button

Summary

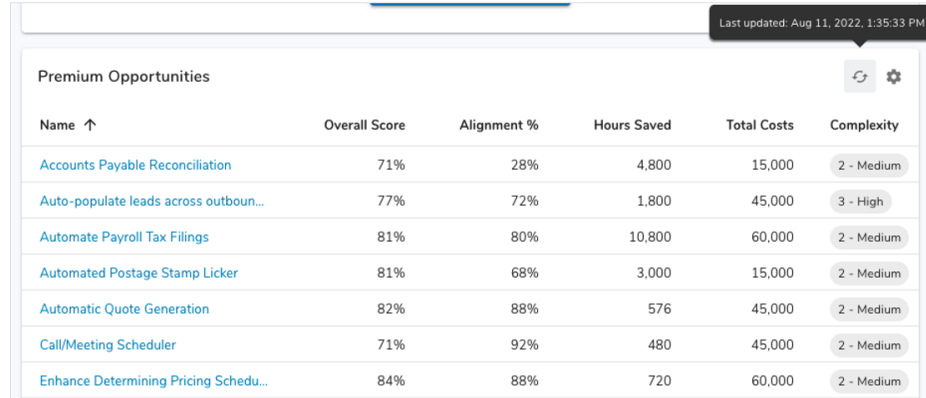
- Previously, when edits were made or when items were created, a page refresh was required to see changes reflected within a Table section.
- Users wanted their own updates to be reflected immediately within a Table, and they wanted a faster way to update the Table to reflect any potential changes made by other users.
- Now, Tables update immediately when any data is changed on a page, including item creation from a Create Form or the Sidebar Create. Additionally, a refresh button on the Table section provides a quick way to ensure users are viewing the latest data.

Applicable to

- Tables

Set up

- No setup is required for the refresh button on a Table section. Click the button to refresh the entire section.



The screenshot shows a table titled "Premium Opportunities" with a refresh button (circular arrow icon) and a settings gear icon in the top right corner. A dark notification box in the top right corner states "Last updated: Aug 11, 2022, 1:35:33 PM". The table has six columns: Name (with an upward arrow), Overall Score, Alignment %, Hours Saved, Total Costs, and Complexity. The rows list various business processes with their respective scores and costs.

Name ↑	Overall Score	Alignment %	Hours Saved	Total Costs	Complexity
Accounts Payable Reconciliation	71%	28%	4,800	15,000	2 - Medium
Auto-populate leads across outboun...	77%	72%	1,800	45,000	3 - High
Automate Payroll Tax Filings	81%	80%	10,800	60,000	2 - Medium
Automated Postage Stamp Licker	81%	68%	3,000	15,000	2 - Medium
Automatic Quote Generation	82%	88%	576	45,000	2 - Medium
Call/Meeting Scheduler	71%	92%	480	45,000	2 - Medium
Enhance Determining Pricing Schedu...	84%	88%	720	60,000	2 - Medium

Resolved Issues

Release		#	Issue
175.1	*	8813	Tabs display extra white space at bottom of screen when you toggle between tabs
175.2	*	8818	Unable to use bulk edit to create new items
175.3	*	8824	When using SSO Shibumi is logging into a blank screen
176.0	—	8817	Sort templates on Create top level instance dialog