

176.1 & 177.0 Release Notes

26 August 2022

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- Presentations stuck in publishing state

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- Table Section: Preview Pane for Table section
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- Workplan Gantt: Display Target dates alongside Actual dates

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Issue Resolutions

- Import warning for attribute replacement with same API name not working
- Notifications display blank page when notification has long text strings
- Views appear blank after customizing in a Dashboard when Report View is disabled
- Workplan Gantt: Marker Name expression not working
- Values added to the new attributes on Form show up on instances on publish
- Table on Dashboard requires page refresh when changing height
- Cannot scroll in rich text sections
- Adding a new option to a Pick List doesn't display on template until page refresh

Preview Pane for Table Section

Summary

- Previously, the Table section was introduced as an extremely performant way to view large amounts of data.
- Editing data or seeing further information about an item in a Table Section required navigating to the specific instance of the item.
- Now, the Table section includes a Preview Pane, like our Lists/Views, to allow for editing and drill-down of the item without having to navigate to its specific instance.

Applicable to

- Table section

Set up

- No setup is required, as the Preview Pane is enabled by default.
- To disable the Preview Pane, deselect the checkbox option in the Table settings dialog.

The screenshot displays the RPA Demo 2023 interface. The main table, titled 'RPA Opportunities', lists various workstreams with columns for Overall Score, Alignment, Total Savings, Total Costs, Complexity, and Implementation Date. A preview pane is open on the right, showing details for the 'Consolidate Automate Payroll Tax Filings' opportunity. The preview pane includes a progress bar for the Overall Score (81%), a bar for Alignment (72%), and the Expected Annual Benefit (\$142,560). The preview pane also shows a flow diagram with stages: Idea, Pipeline, In Progress, and Deployed.

Workstream > Stage > Name	Overall Score	Alignment	Total Savings	Total Costs	Complexity	Impleme
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
Enhance Recording and Categorizing Ex...	78%	60%	63,360	30,000	2 - Medium	
Strengthen Reviewing and Reconciling T...	70%	52%	95,040	60,000	3 - High	
3 - In Progress	81%		956,352	306,800		
Automate Envelope Mail Out	69%	44%	55,440	60,000	3 - High	
Consolidate Uber Payments	67%	20%	95,040	30,000	2 - Medium	Aug 5
Download Exchange Rate Data	81%	88%	118,800	61,000	3 - High	Jul 2
Enhance Invoicing Clients	79%	68%	114,048	26,000	2 - Medium	Aug 17
Order to Cash Phase 1	81%	84%	300,960	48,800	2 - Medium	Apr 23
Streamline Reviewing and Reconciling Tr...	76%	72%	152,064	51,000	3 - High	Jun 16
Workflow for payments	81%	72%	120,000	30,000	2 - Medium	Oct 2
4 - Deployed	82%		63,360	45,000		
Automate Customer Outreach	82%	80%	63,360	45,000	2 - Medium	Jul 26
HR	74%		1,340,378	845,000		
1 - Idea	72%		102,114	135,000		
Organize Preparing and Amending Docu...	71%	44%	62,208	60,000	2 - Medium	
Personalize Quarterly Training Curriculum	72%	52%	38,880	30,000	3 - High	

Set up (continued)

- To open the Preview Pane, hover over the row in the Table until you see the magnifying glass icon. Selecting the row while the icon is visible will open the Preview Pane for that item.

Progress Bar Section

Summary

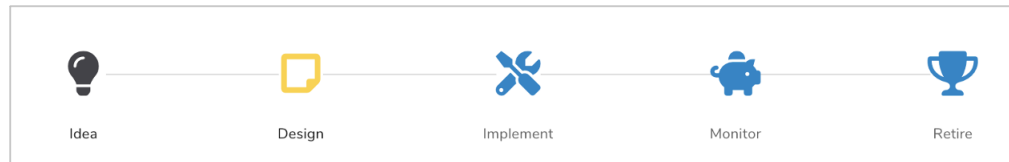
- Previously, an external URL was used to display a Stage Gate / Chevron section to depict workflow progress.
- App Admins would need to modify a complex URL to configure the Chevron section.
- Now, the Progress Bar section is available. It allows for easy setup of a highly configurable progress bar that shows the workflow stage of a work item.
 - Can be displayed horizontally or vertically
 - Uses latest FontAwesome icons

Applicable to

- Tabs, Dashboards, Presentations

Set up

- On a template tab, dashboard or presentation, from the Layout edit mode, click Add Section.
- Select the Category of the Progress Bar section (this is configurable but is typically: Visualizations).



Set up continued

- Click on the Progress Bar option to add it to the layout.
- Click on the Settings gear in the top right corner of the Section to open the Settings modal.
- Modify the settings to define the behavior of the Progress Bar section.
- The steps within the Progress Bar are defined based on a selection of a Pick List defined on the template.
- Save the settings.

Notes

- The maximum number of steps that can be added to a Progress bar is 15.

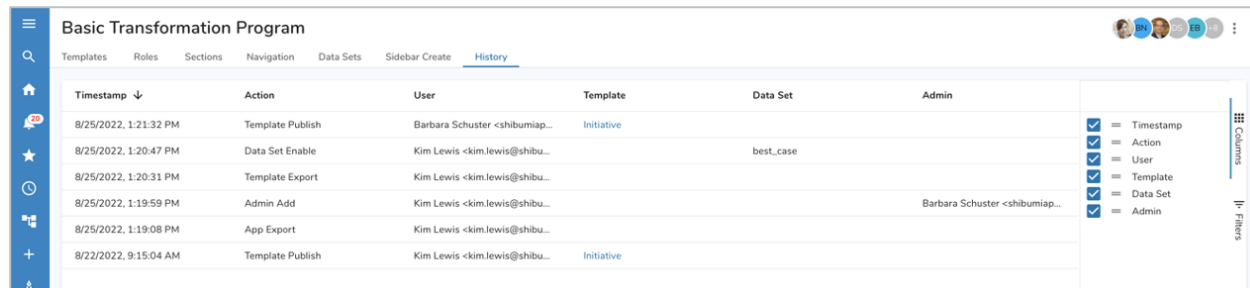
App History Tab

Summary

- Previously, template admins could not view the history of changes made to an App.
- Having audit information about the app can be helpful for App Admins when they are troubleshooting changes or assessing impact of upgrades (i.e., app imports).
- Now, the App History Tab tracks the following: App install / export / upgrade, Templates publish / import / export, App Admin add / remove, and Data Set enable / disable.

Applicable to

- Apps



Timestamp ↓	Action	User	Template	Data Set	Admin
8/25/2022, 1:21:32 PM	Template Publish	Barbara Schuster <shibumiap...	Initiative		
8/25/2022, 1:20:47 PM	Data Set Enable	Kim Lewis <kim.lewis@shibu...		best_case	
8/25/2022, 1:20:31 PM	Template Export	Kim Lewis <kim.lewis@shibu...			
8/25/2022, 1:19:59 PM	Admin Add	Kim Lewis <kim.lewis@shibu...			Barbara Schuster <shibumiap...
8/25/2022, 1:19:08 PM	App Export	Kim Lewis <kim.lewis@shibu...			
8/22/2022, 9:15:04 AM	Template Publish	Kim Lewis <kim.lewis@shibu...	Initiative		

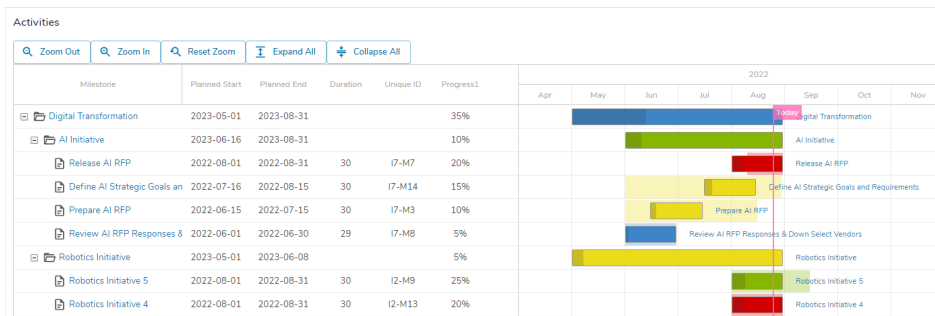
Set up

- No setup required.
- To see the App history, select the Apps Icon from the Sidebar and open to the desired App.
- Select the right-most tab titled 'History'.
- Any changes made to the app are recorded in a list with the timestamp, name of action, and user who took the action.
- Columns can be added and removed via the panel on the right of the table.
- Sorting and filtering is available from each column header row.

Workplan Gantt: Display Target Dates alongside Actual

Summary

- Previously, Actual start and end dates were displayed to depict the duration of a milestone or task within a Workplan Gantt.
- To better assess achievement against plans, App Admins wanted to be able to display the Target dates simultaneously with the Actual dates.
- Now, the Target start and end dates can be tracked alongside Actual dates on a Workplan Gantt. Target dates are depicted with a shadowed bar within the Workplan Gantt.



Applicable to

- Workplan Gantt

Set up

- With a new or existing Workplan Gantt, select the Settings icon on the Section. Navigate to the Datasources option in the dialog.
- Each Datasource can now be configured to show Target Start Date and End Date alongside the Actual Start and End Date.
- Displaying the Target dates is optional.

The screenshot shows the 'Settings' dialog for 'Datasources'. The 'Default Filters' section is active. Under 'Filter Mappings', a mapping is defined for 'Filter Variable Name: Workstream__f' to 'Mapping Name: Name'. The 'Item' section contains several configuration options, with 'Target Start Date (Optional)' and 'Target End Date (Optional)' highlighted by a blue box.

Section	Default Filters
Datasources	+ Add Default Filter
Dependencies	
Table Columns	
Markers	Filter Mappings
	Filter Variable Name: Workstream__f, Mapping Name: Name
	+ Add Filter Mapping
Item	Unique Identifier: Workstream Unique Id, Title: Name, Color (Optional): Workstream Bar Color, Type (Optional): Gantt Type
	Start Date: Planned Start Date, End Date (Optional): Planned End Date, Duration (Optional):, Progress (Optional): Percentage, Field
	Target Start Date (Optional), Target End Date (Optional)

Resolved Issues

Release		#	Issue
176.1	*	8858	Presentations stuck in publishing state
177.0	*	8837	Import doesn't show warning if attribute is replaced by another attribute type with the same API name
	*	8829	Notifications display blank page when notification has long text strings
	*	8822	Views appear blank after customizing in a Dashboard when Report View is disabled
	!	8827	Table on Dashboard requires full page refresh when going from Fit to Window to Fixed Height
	!	8799	Values added to new attributes on a form show up on instances on publish
	!	8739	Workplan Gantt: Marker Name expression not working
	—	8857	Adding a new option to a Pick List attribute doesn't display on template until page refresh
	—	8850	Cannot scroll in rich text sections