

196.1-3 & 197.0 Release Notes

29 July 2023

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- Auto ID # column in Table and Form sections includes comma
- Cannot save Custom Forms for Tables
- Error replacing a user
- Presentation slides that render quickly don't snapshot
- App upgrade can fail because of deleted templates

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- Alert Section
- Ability to aggregate values from Name/Numeric Value and Icon/Name/Numeric Value picklists on Cards
- Tighten padding within grouped column on Tables
- Provide ability to Disable MFA from any enterprise via Enterprise Admin Users tab
- New templates should not have any tabs upon creation

197.0 Issue Resolutions

- Navigation tree does not show all valid instances if parent isn't included
- Blank page when exporting individual template with association attribute referencing a deleted attribute
- Metric API names should not be editable after creation
- Sort no longer working on grouped table columns
- Unable to see University icon in Lists/Views
- Removing users from the Assign Role business rule does not remove them on save
- Complex dependencies could cause GraphQL calls to fail for the Workplan Gantt
- GraphQL Documentation for Obtaining a Token is Missing Required Parameter

Alert Section

Summary

- Previously, Shibumi provided the ability to define dynamic instructions within Form sections.
- App Admins requested the ability to display dynamic messages outside of form sections (e.g., welcome messages on home pages) and also wanted the ability to categorize the message as information, success, warning, or error (e.g., to assess whether entered data satisfies business requirements).
- Now, the configurable Alert section provides flexibility to communicate important information.

Applicable to

- Templates, Dashboards, Presentations

Set up

- While in Design mode on a Layout, select the 'Add Section' button.
- From the Add Section dialog, select the Alert tab and click 'Add'.

The screenshot shows the 'Alert Settings' dialog. At the top, there are three example alert cards: a green 'Success' card with the message 'Opportunity is on track.', a yellow 'Warning' card with 'Minor issues with Opportunity.', and a red 'Error' card with 'Critical issues with Opportunity!'. The main configuration area is for a 'Help Text' alert. It includes a title 'Help Text', a severity dropdown set to 'Info', a checked 'Enable Icon' checkbox, and a content field with the text 'Please fill in all fields to the best of your ability.'. A preview of the alert is shown at the bottom, displaying the 'Help Text' title and the content text. The dialog has 'Cancel' and 'Save' buttons at the bottom right.

Set up cont.

- In Configure Mode, open the Alert Settings dialog, add an Entry and configure the condition, severity, title and content for the section.
- Optionally, add additional Entry's to display unique Alert messages when different conditions are satisfied.
- Save and Publish your changes.
- Note: You can apply Markdown Notation in the Content field to format the text.

Ability to select Pick Lists as Value for Cards

Summary

- Previously, Shibumi provided the ability to display aggregations of numeric attributes in Card sections.
- Often, App Admins configured solutions with name/value or icon/name/value pick lists to allow users to select from a list of text options that would result in a corresponding value score for each. This approach might be used, e.g., when assessing complexity or assigning a prioritization score to an initiative.
- App Admins wanted the ability to display the aggregated value from the pick list attributes in a Card section.
- Now, Name/Numeric Value and Icon/Name/Numeric Value picklists are available for selection in the Attribute Summary field on Cards.

Applicable to

- Card section

Set up

- On a Layout in Design mode, select the 'Add Section' button.
- Select Card in the dialog and choose a template type. From Configure mode, open the Card Settings dialog.

The image shows two screenshots from the Shibumi interface. The top screenshot displays a list of attributes with a dropdown menu open, showing 'Complexity to Automate' selected. The bottom screenshot shows the 'Attributes' configuration window with a table of attributes.

Name	Value
Average Complexity to Automate for all Opportunities	2
Automate Customer Outreach	3 - High (3)
Download Exchange Rate Data	3 - High (3)
Automate Payroll Tax Filings	3 - High (3)
Foster Payroll Adjustments	
Expense Exception Processing	
Strengthen Reviewing and Reconciling Transactions	
Adjust Preparing and Amending Documents	
Order to Cash Phase 1	2 - Medium (2)

Name	Editable Rule	Data Type	Actions
<input type="checkbox"/> Complexity to Automate (Complexity_to_Automate__c)	No	Pick List - Name / Value	
<input type="checkbox"/> Function (Function__c)	No	Pick List - Single	
<input type="checkbox"/> Idea Action (Idea_Action__c)	Yes	Pick List - Single	

Set up cont.

- Toggle the Value Type to 'Attribute Summary'.
- From the Attribute drop down, choose a Picklist Attribute.
- Save and Publish.
- *Note: Only the Numeric Value will be displayed on the Card section. The Name and Value, however, will display in the Drill Down dialog.*

196.1-2 Resolved Issues

Release		#	Issue
196.1	*	9730	Auto ID # column in Table and Form sections includes comma
	*	9729	Cannot save custom forms for Tables
	*	9682	Error replacing a user
196.2	*	9734	Presentation slides that render quickly don't snapshot
196.3	*	9749	App upgrade can fail because of deleted templates

197.0 Resolved Issues

Release		#	Issue
197.0	*	9719	Metric API names should not be editable after creation
	*	9693	Documentation For Obtaining a Token is Missing Required Parameter
	*	9691	Unable to see University icon in Lists/Views
	*	9680	Blank page when exporting individual template with association attribute referencing a deleted attribute
	*	9658	Navigation tree does not show all valid instances if parent isn't included
	*	9608	Sort no longer working for grouped Table columns
	!	9731	Complexity of dependencies would cause GraphQL calls to fail for the Workplan Gantt
	!	9663	Removing users from the Assign Role business rule does not remove them on save