200.0 Release Notes

9 September 2023

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- Data Sets for Date & Numeric Attributes
- Seed descendant work items using Table Create on template

Issue Resolutions

- Import via Export/Import section is not performant when Association columns are included
- Cannot import app after deleting child template
- Installing 2 Apps at the same time can cause App creation to fail for all future Apps
- Opening the sidebar Create dialog changes tabs on the work item
- Cannot unselect Assocation seamlessly from dropdown
- Template copy dialog does not generate API Name to match new name
- Work Item Page Filter fails with trailing space

Sunset Notification

- Remove History Frequency template setting. Going forward, all History will be displayed using the "All Time" frequency.

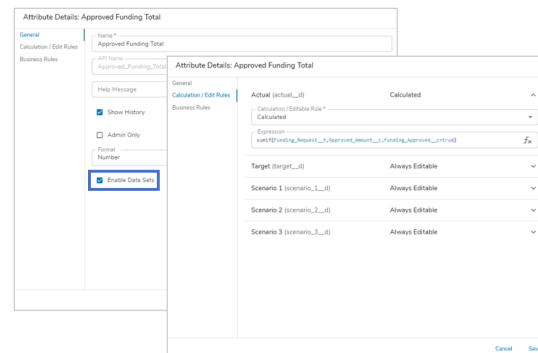shibumi

Date & Numeric Attributes Data Sets

Summary

- Previously, Admins could create Metrics that contain a collection of data sets and an array of time periods to measure results.
- App Admins wanted the ability to utilize Data Sets in attributes as well, to easily track and pivot non-time-series data.
- E.g., You want to compare Start/End dates for an Opportunity based on Actual vs Target dates.
- Now, Data Sets can be enabled for Date and Number Attributes.

Applicable to

- Date Attributes, Number Attributes, Data Sets

Set up

- Toggle the Data Panel on a Template and navigate to a Date or Number attribute, or create a new one.
- On the Attribute Settings dialog, select the 'Enable Data Sets' checkbox. Enter any calculations or rules based off the attribute data sets. Save. Publish.

Notes

- To reference a Data Set in an expression, append the specific Data Set API Name to the attribute name. If the dataset is not included in the expression, Shibumi will assume the actual__d data set is being referenced.
  - E.g., Date_Attribute__c.actual__d, Number_Attribute__c.target__d
- Date & Number attributes referenced in sections can respond to Data Set page filters, dynamically updating the values displayed. Now, if a form on a layout contains the Business Case data to justify investment in a project (anticipated value, anticipated achievement date, etc.), a page filter could toggle to show the Best, Worst, and Likely achievement anticipated for the project.

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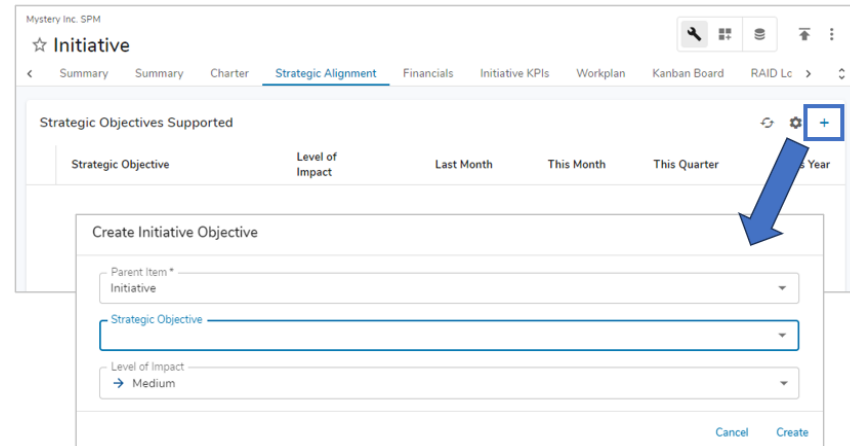# Seed Content on Template Using Table Create

Summary

- A common approach in Shibumi solutions is to, e.g., seed an Initiative work plan with the Milestones that are required to adhere to the program methodology. App Admins do this by creating the Milestones on the Initiative template. When a user creates an Initiative, it will include the seeded Milestones.
- Previously, Admins could seed the content using a List or a Create Form button.
- Recently, we introduced the ability to create items directly from a Table section but this was only available on work item instances (i.e., not on the template).
- Now, Table Create is available on a template and App Admins can use it to seed descendant content (e.g., Milestones on an Initiative).

Applicable to

- Table Create, Templates

Set up

- If a Table already has 'Create Form' enabled, there is no additional setup required.
- Otherwise, on a Template in Configure mode open the Table Settings dialog and select Default or Custom Form for the Create Form option. Save and Publish.

Notes

- When seeding content on a template, you cannot define values in association attributes.

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Resolved Issues

Release		#	Issue
200.0	✳	9753	Import via Export/Import section is not performant when Association columns are included
	✳	9669	Cannot import app after deleting child template
	✳	9659	Installing 2 Apps at the same time can cause App creation to fail for all future Apps
	❗	9797	Opening the sidebar Create dialog changes tabs on the work item
	❗	9674	Template copy dialog does not generate API Name to match new name
	—	9698	Work Item Page Filter fails with trailing space
	—	9360	Cannot unselect Association seamlessly from dropdown

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