

172.1-5 & 173.0 Release Notes

17 June 2022

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- Custom section performance issue
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- SSO users need to enter usernames again after idle time logout

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Issue Resolutions

- Enterprise name should not be editable from Enterprise Admin
- Children on templates should not show template buttons
- Custom sections can save configuration incorrectly which causes section to break
- Set Value business rule fails when "Set" function is too long
- Table section export produces corrupted Excel file due to special characters
- Create number attribute "Decimal Places" setting forces leading zero when editing

Enhanced Forms

Summary

- Previously, Form layouts could show 1 or 2 columns, with no further configurability options. Updates to fields were saved upon click out of the field.
- Admins wanted more control and flexibility over how to structure fields within forms, and they wanted assurance their updates saved.
- Now, our new Forms have completely flexible layouts, with dividers, headers, and help text, and there are Save/Cancel buttons so end users can explicitly save their field updates.

Applicable to

- Forms

Set up

- Upgrade existing Forms by navigating to the Form on a template, clicking the settings gear, and selecting Upgrade. To upgrade your entire App at once, contact your Shibumi Solution Consultant.
- To customize a new/upgraded Form, click the settings gear and select Customize Layout. Click Add Field to add existing Attributes or a Header/Instruction field.

Configuration Mode

Team	Investment Questions	INVESTMENT SCORE: 0.0
Project Owner	Level of impact this will improve our reputation within the industry?	Level of impact on corporate STARIS scoring
Business Sponsor	Level of impact this idea will improve the overall member experience	Estimated annual financial benefit?
Collaborators	Level of impact on customer information?	Number of business areas this will impact?
	Level of impact on regulatory or compliance processes	Number of months to achieve benefit?
		How many months after implementation to achieve the estimated benefit? (average period?)

User Mode

Team	Investment Questions	INVESTMENT SCORE: 3.3
Project Owner Ethan Eisler	Level of impact this will improve our reputation within the industry? High	Level of impact on corporate STARIS scoring High
Business Sponsor Johnathan Smith	Level of impact this idea will improve the overall member experience Medium	Estimated annual financial benefit? \$100 - \$249k
Collaborators Galen Bell-Lipp Jason Massey Kim Lewis Ryan Cate William Oshiro	Level of impact on customer information? High	Number of business areas this will impact? 4 to 5
	Level of impact on regulatory or compliance processes Medium	Number of months to achieve benefit? over 12 months

Set up (continued)

- Customize fields by clicking the settings gear. Remove fields using the X. Resize/move fields to customize the layout.
- For full documentation visit:

<https://shibumi.com/support/knowledge-base/forms-overview/>

Template Data Panel

Summary

- Previously, template data was accessed by toggling into Data mode on a template. A separate page opened to allow data management.
- Now, template data displays at the bottom of the page, allowing for data creation and management without leaving the layout you had previously been working on.

Applicable to

- Templates, Data Management

Set up

- Click on the Data icon in the upper right corner of a template.
- Resize the height of the panel by dragging the top. Minimize and maximize shortcuts are available in the upper right corner of the panel.
- Close the panel by clicking on the data icon again or clicking the X in the upper right corner of the panel.

The screenshot shows the 'BT Initiative' Charter page for 'XYZ Corp 2023'. The page has a navigation bar with tabs: Identify, Automation, Plan, Summary, Summary, Charter (selected), Financials, Activities, Risks, and History. The main content area is split into 'Details' and 'Description' sections. The 'Details' section shows fields for Region, Country, and others. The 'Description' section shows fields for Estimated Saving Start, Estimated Annual Bene..., Benefit Category, and JIRA ID. Below the main content is a 'Template Data Panel' with a search bar and a '+ Create Attribute' button. The panel contains a table of attributes:

Name ↑	Editable Rule	Data Type	Actions
# Activities at Risk (Activities_at_Risk__c)	Calculated	Number	⚙️ 🗑️
# Activities Completed (Activities_Completed__c)	Calculated	Number	⚙️ 🗑️
# Activities Delayed (Activities_Delayed__c)	Calculated	Number	⚙️ 🗑️
# Activities On Target (Activities_On_Target__c)	Calculated	Number	⚙️ 🗑️
# Benefit Change (Benefit_Change__c)	No	Number	⚙️ 🗑️
Active (active)	Read-only	Text - Single Line	⚙️ 🗑️

Attachment Attribute

Summary

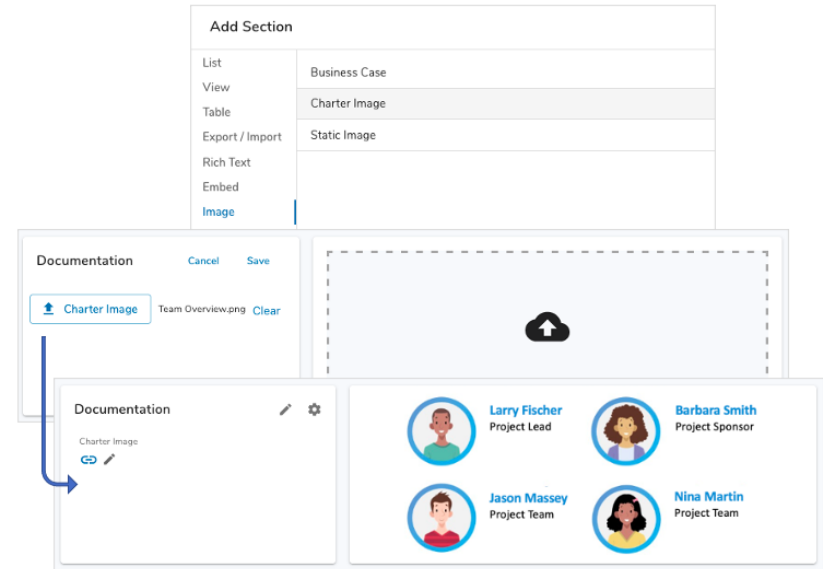
- Previously, attachments could be added to work items via an Attachment List or the Attachments Tab.
- Admins wanted the ability to know if a specific attachment had been uploaded to a work item, and to display unique images per work item, rather than always showing a static image.
- Now, an attachment attribute can be added to templates, allowing users to upload an attachment via a Form. Image sections can point to an attachment attribute, dynamically updating as end users upload new files to work items.

Applicable to

- Attributes, Forms, Tables, Image Section

Set up

- On a template Data panel, click Create Attribute and select Attachment. Enter a name and click Create.
- On a Form in Customize Layout mode, select Add Field and Attribute. Choose the new Attachment Attribute and click Save. Select edit to choose a file.



Set up (continued)

- To add a dynamic image to a layout, open the Add Section dialog and select Image. Choose the Attachment Attribute you created. An image can be uploaded via the section or via the Form field.
- Reference attachment attributes in expressions using the isEmpty() function.

Checkbox Attribute

Summary

- Previously, App Admins regularly created pick list attributes with two options (e.g., yes/no).
- Admins wanted a simpler and more intuitive way to configure and display this type of binary data.
- Now, these types of values can be represented with a checkbox.

Applicable to

- Attributes

Set up

- In the template Data panel on the Attributes tab, click Create Attribute and select Checkbox.
- In the create attribute dialog, enter a name, configure settings (optional), and click Create.
- Add the new field to a Form section. Publish the template.
- Note: Checkbox fields can ONLY be added to the enhanced forms,. I.e., they cannot be added to forms that have not yet been upgraded.

The image displays two overlapping screenshots of a form. The top screenshot shows a form with the following fields: 'Estimated Saving Start Date' with a date picker set to '09/01/2020', 'Estimated Annual Benefit' with a text input set to '120000', 'Approval Required?' with a checked checkbox, and 'Benefit Category' with a dropdown menu set to 'Technology'. The bottom screenshot shows the same form after the 'Approval Required?' field has been converted to a checkbox attribute, with the label 'Approval Required?' and the checked checkbox. The other fields remain the same.

Additional notes

- Checkbox attributes can be added to Tables and Forms, but not Lists or Views.
- Checkbox attributes can be referenced in expressions with the values true and false.

Reference Page-level Filters in Table Metric Columns

Summary

- Previously, we introduced page-level filtering so all sections could respond to the same set of filters.
- App Admins wanted the ability to dynamically set the timeframes for Table metric columns to quickly switch between dates displayed.
- Now, page-level filters can be referenced in Table metric columns and Table data will immediately update as filters are changed.

Applicable to

- Table Section, Page-level Filters

Set up

- On a template, add page-level filters.
- In a table section, add metric columns, and select Configure in the column header menu to open the Edit Column dialog.
- In the timeframe date field, enter an expression referencing the page-level filters. Repeat for all metric columns. Save.
- Page-level filters can also be referenced in Table column headers.

Edit Column

ⓘ The API name for this column is Cumulative_Savings__m

Column Header Label

 Tfx

Column Width

Flexible width * |<=>

The total shares of available space this column will have among other flexible columns.

Metric Settings

Data Set * ▼

Timeframe Date * f_x

```
1 date(
2   if(Timeframe__f = "Last Year",
3     value(formatDate(today(), "YYYY")) - 1,
4   if(Timeframe__f = "Next Year",
5     value(formatDate(today(), "YYYY")) + 1,
6     value(formatDate(today(), "YYYY"))
7   )
8 )
9 1, 1
10 )
```

Cancel Update

Configure Workplan Gantt to Use Enterprise Fiscal Year

Summary

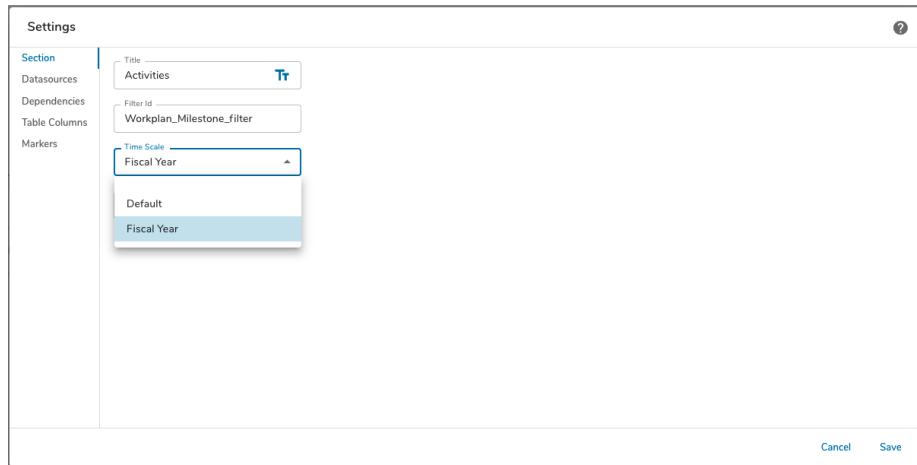
- Previously, all Shibumi Gantt charts were only able to use calendar-based quarters when setting up the time scale.
- App Admins wanted the ability to optionally display quarters as defined by their fiscal year.
- Now, the Workplan Gantt Chart (released in April) has a configuration option that allows you to choose Calendar or Fiscal Year for the time scale.

Applicable to

- Workplan Gantt Chart

Set up

- On a template in Configure mode, select settings for a Workplan Gantt section.
- From Time Scale dropdown, select Fiscal Year. The Fiscal year will be based off the Fiscal Year visible in Enterprise Administration settings.
- Save the dialog. Publish the template.



The screenshot shows a 'Settings' dialog box with a sidebar on the left containing sections: Section, Datasources, Dependencies, Table Columns, and Markers. The main area is titled 'Section' and contains the following fields:

- Title: Activities
- Filter Id: Workplan_Milestone_filter
- Time Scale: Fiscal Year (selected)
- Default: Fiscal Year

At the bottom right of the dialog, there are 'Cancel' and 'Save' buttons.

Additional notes

- The Default time scale is Calendar Year.

Configure the Workplan Gantt Chart Dependency

Summary

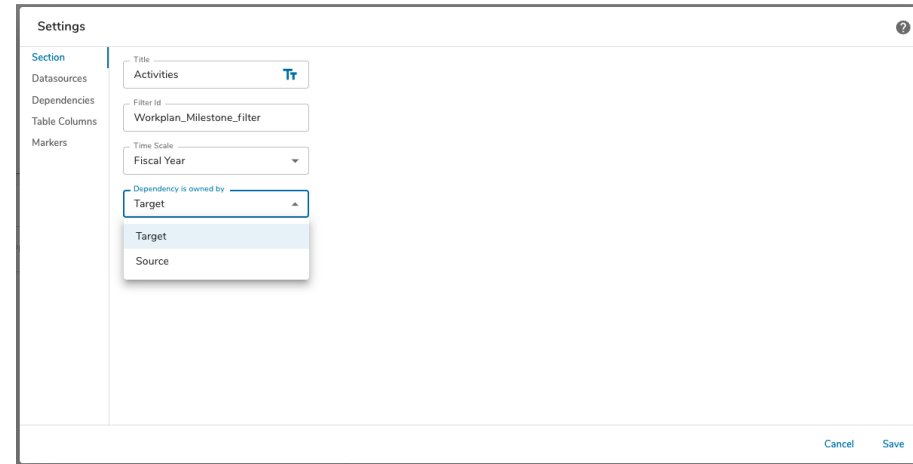
- Previously, the Workplan Gantt chart displayed the dependency arrow from the dependent item (Target) back to the Source.
- While some clients prefer this approach, other clients expect to see the Source pointing to the Target (as it is the dependent item).
- Now, the new Workplan Gantt (released in April) has a new configuration setting that allows you to choose the direction of the dependency as either Target or Source.

Applicable to

- Workplan Gantt section

Set up

- On a template in Configure mode, select settings for a Workplan Gantt section.
- From the Dependency is owned by dropdown, select Target or Source.



The screenshot shows the 'Settings' window for a Workplan Gantt section. The left sidebar lists sections: Section, Datasources, Dependencies, Table Columns, and Markers. The main area shows the following settings:

- Title: Activities
- Filter Id: Workplan_Milestone_filter
- Time Scale: Fiscal Year
- Dependency is owned by: Target (selected)

The 'Dependency is owned by' dropdown menu is open, showing two options: 'Target' and 'Source'. The 'Target' option is currently selected. At the bottom right of the settings window, there are 'Cancel' and 'Save' buttons.

172.1-5 Resolved Issues

Release		#	Issue
172.1	*	8650	New users can't be added in EU or AP environments
172.2	*	8657	Custom section performance issue
172.4	*	8664	Potential data type issue in auth-service triggered intermittent outage
172.5	*	8674	SSO users need to enter their usernames again after idle time logout
	*	8656	Reply to discussion notification is showing the wrong sender name

173.0 Resolved Issues

Release		#	Issue
173.0	*	8707	Set Value business rule fails when "Set" function is too long
	*	8671	Children on templates should not show template buttons
	*	8544	Enterprise name should not be editable from Enterprise Admin
	!	8647	Tiles occasionally save configuration incorrectly which causes section to break
	!	7945	Table section export produces corrupted Excel file due to special characters
	.	8308	Create Number Attribute "Decimal Places" forces leading zero when editing