

# 230.1 & 231.0 Release Notes

03 May 2025

# Contents

## 230.1 Issue Resolutions

- Excel export is corrupted when there is a 'vertical space' special character in a Table section
- Provide ability to Copy and Paste Currency Values from Excel into a Number Metric in a Table/Bulk Edit

## 231.0 Issue Resolutions

- Error configuring Business Rule On Edit trigger after configuring a scheduled trigger
- Improve page load when there's a large work item filter with a simple filter expression
- One day added during Import if browser's timezone is past midnight UTC
- Unable to remove Open Resources with slashes in the name
- Searching % returns all items

## 231.0 Enhancements

- AI Agent: Recommend Value
- Charts: 100% Stacked
- Charts: Chart-to-Chart Drill Down
- Expressions: months() Function to return the count of months/periods between two dates
- Work Item: Creating a link now points to the current tab
- Work Item: Outline Numbering

# AI Agent: Recommend Value

## Summary

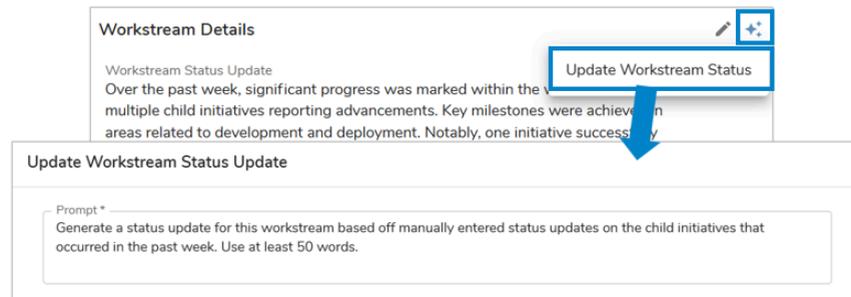
- A common task when running your strategic programs to prepare a consolidated status summary at various reporting levels (e.g., Initiative, Workstream, Program). Team members author these summaries today by manually reviewing all related activities/tasks. This can be a time-consuming exercise.
- To address this challenge, we are introducing AI Recommend Value. This capability allows you to configure an AI Agent to prepare these types of updates for you.
- For example, AI Recommend Value can automatically update a workstream Status Summary based on the analysis of the statuses of the initiatives within the workstream. Rather than requiring a workstream lead to manually review and consolidate inputs, the system can generate a suggested summary based on underlying data and a tailored prompt.

## Applicable to

- Attributes

## Set up

- On a Template, open the Data Panel and navigate to the AI Actions tab.



## Set up cont.

- Select the 'Add AI Action' button and choose 'Update Value'.
- Provide a Name for the AI Action, select an attribute. Provide a prompt with detail about the value to be updated. Click 'Next'.
- Select a descendant template type and the attribute values to be evaluated. Optionally, add filters to scope which descendent items to review. Save.
- Next, go to the Form section displaying the attribute and enter Customize mode. Open the settings for the attribute field.
- On the AI Actions tab, select the configured AI Action to enable it for the Form. Save and Publish.
- From a work item instance, select the AI Action icon on the Form. The AI prompt will be displayed and you can edit if necessary. Click 'Create' to generate a recommended value.

# Multi-level 'Chart to Chart' Drill Down

## Summary

- Previously, users could drill down into Column and Stacked Column Charts to see the detailed list of work items which contributed to the value represented in the selected column/column slice.
- To better understand program data, Leadership and PMO teams requested greater ability to inspect the data by re-scoping the chart visualizations.
- Following this weekend's release, these Charts can be configured to allow multi-levels of 'Chart to Chart' drill down prior to the final table showing the detailed list of contributing work items.

## Applicable to

- Column, Stacked Column

## Set up

- Open the Settings dialog & navigate to the Drill Down tab. Select the '+ Add Group By' option.
- In the Attribute field, choose an Association, Checkbox, or Pick List value. Add additional Group By's if desired. Save.



## Notes

- If no Group By's are configured, selecting a column or stack slice displays a table of the items contributing to value of the column/slice.
- If Group By levels are configured, each drill down chart displays a breadcrumb trail representing the previous chart levels.
- Selecting a column on the final drill down chart displays table of the items contributing to value of the column.

# 100% Stacked Chart

## Summary

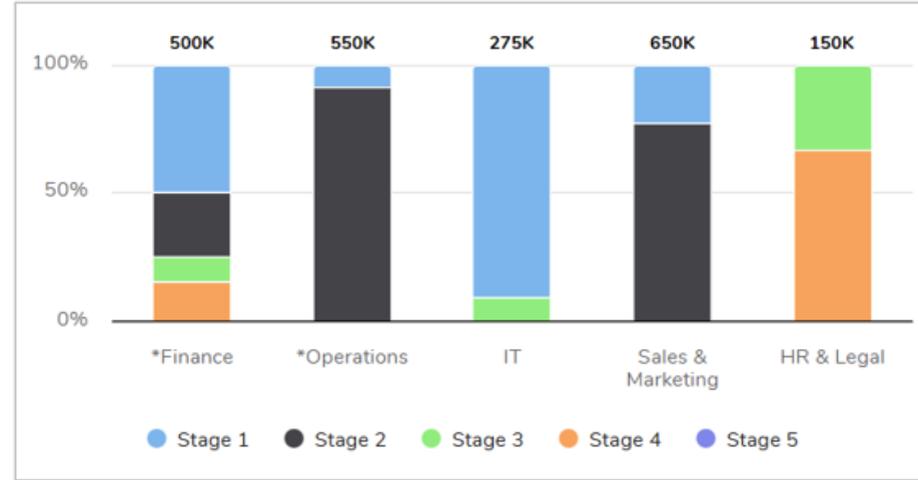
- Previously, App Admins had to configure Pie/Donut Charts to display aggregated values represented as percentage contributions of a category total.
- However, Pie/Donut Charts are limited to a single category assessment. Clients requested a new chart type to provide the same information across multiple categories.
- Now, to streamline review of program data, Shibumi solutions can include the 100% Stacked Chart which effectively compares relative contribution proportions of different slices within and across categories.

## Applicable to

- 100% Stacked Chart

## Set up

- On a Template or Dashboard while in Configure mode, open the 'Add Section' dialog and select the '100% Stacked' option within the Chart tab.
- Define a template(s) for the Datasource and any filters if needed.



## Set up cont.

- Choose from an Item Name, Association, Pick List, Checkbox or None (aggregation of all work items) for the Group By.
- Select an attribute/metric for the Value, optionally add more Values.
- Define the Slice By from an Association, Pick List, or Checkbox, these values can then be formatted further if required.
- Optionally, define whether the Chart legend will be displayed and whether values will be shown on the Chart.

# months() Function

## Summary

- Previously, Shibumi introduced the days() and weeks() functions to return the number of days and weeks between two dates, respectfully.
- With the introduction of Retail Calendar enterprises and their variance in the display of days/weeks/periods/quarters, customers also needed a function to determine the count of months/periods between two dates.
- For example, a common practice is to lock down certain reporting values from being edited in the 3rd month/period of a quarter.
- Now, the months() function can be leveraged to return the number of months/periods between two dates.

## Applicable to

- All places where the Shibumi Expression Language can be used.

**Create Number Attribute**

1 Definition

Name \*  
Month of Quarter

API Name  
Month\_of\_Quarter\_\_c

Help Message

Show History

Admin Only

Format Number

Enable Data Sets

2 Calculation / Editable Rules

**Create Number Attribute**

✓ Definition

2 Calculation / Editable Rules

Calculation / Editable Rule \*  
Calculated

Expression  
(months(Today\_\_c, quarterStart(Today\_\_c))) + 1

fx

Previous Create

## Set up

- Syntax: months(date1, date2)
- date: An expression that results in a date value (i.e., a hard-coded date, a reference to a date attribute, or a function that returns a date value).
- The function will subtract date2 from date1.

# Outline Numbering

## Summary

- Previously, when customers wanted to reference program content using outline numbering, it required either manually prefixing items with the number or defining elaborate calculations to assign a prefix to the items.
- This approach was tedious and difficult to maintain especially when sequence order changed.
- Now, Outline Numbering can be applied to work items and, when a sequence change is made, it will automatically ripple to appropriately adjust the numbering of other items.

## Applicable to

- Templates, Work Items

## Set up

- On a Template, open the Settings dialog and select the 'Enable Outline Numbering' checkbox. Click Save. A new attribute named 'Outline Number' will be visible in the Data Panel.
- The Outline Number attribute can then be added to an Edit Form to allow the re-numbering of work items within the hierarchy.

Settings

App  
Business Transformation App 1.6

App API Name  
App\_9\_\_app

Type  
Initiative

API Name  
Initiative\_\_t

Deletable Only By  
Instance Admins

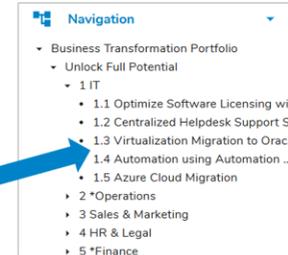
Completion Date when Marked Complete  
Always set to Current Date

Admin Only

Enable Outline Numbering

Track target dates

Cancel Save



## Notes

- Table sections can include the Outline Number attribute as a column and it can be used to filter and sort the table content.
- Outline Numbers are generated based on the app's defined template hierarchy.
- The Outline Number will prefix the work item's Name in the page header and on the Navigation Sidebar.
- The Outline Number attribute is not referenceable using Shibumi expressions.