

231.1-3 & 232.0 Release Notes

31 May 2025

Contents

231.1-3 Issue Resolutions

- Table Section breaks when conditional formatting for data set is enabled then disabled
- Error loading Metric Views sorted by Updated date
- 100% Stacked Chart: Default Colors not respected for Pick Lists when formatting is enabled

232.0 Issue Resolutions

- Business Rules sometimes get reordered after app upgrade
- Associations with hyperlink disabled appear with their hyperlink in table Groups
- Intrinsic Status Icon not set correctly on Import

232.0 Enhancements

- App Details: Template Graph
- Dashboards: Save as Dashboard for legacy dashboards
- Dashboards: Replace Copy with Save As
- Data Sets: Baseline, Impact, Plan
- Import/Export: Ability to download file of Import error messages
- Outline Number: Show outline number ahead of Name
- Tables: Move Bulk Edit option out of settings gear
- Tables: Metric Drill Down

Apps: Template Graph

Summary

- Previously, App Admins could access the App Details: Tree View to visualize the hierarchical (parent/child) relationships between templates within their solution.
- However, one of Shibumi's key benefits is the ability to define non-hierarchical associations between templates. These associations were not visualized in the Tree View, requiring App Admins to navigate to each template's data panel to fully understand the app's structure.
- Now, App Admins can use the Template Graph from the App Details page to visualize both hierarchical relationships and associated templates, offering a more complete view of solution structure.

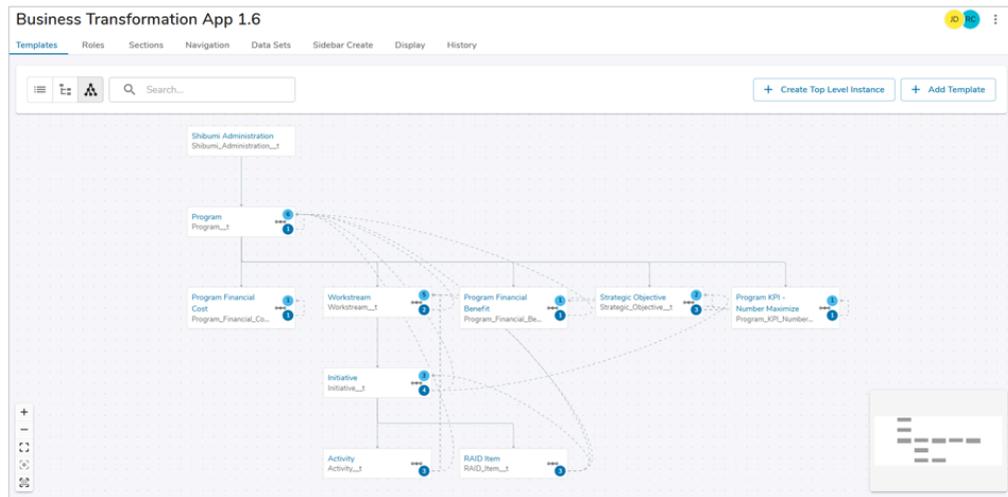
Applicable to

- Apps, Templates, Associations

Set up

- No setup required, available on all App Detail pages upon release.
- As an App Admin, select the 'Apps' from the sidebar. Choose an App and select the 'Template Graph' option on the Templates Tab.

For Shibumi Customer and Partner Use Only.



Notes

- In the Graph view selecting a template will highlight its immediate parent, child and any associated templates. This can also be done via the search bar.
- For each template 'card', the top value on the right represents the count of association backreferences (other templates with associations to me) and the bottom value is the associations for the template (templates I have associations to). Hover over the association icon for a detailed list.
- While a template is selected, choose the 'Focus Selected Templates' option in the bottom left to scope the view to related templates (Parent, Child, or Association).

Save as Dashboard for legacy dashboards

Summary

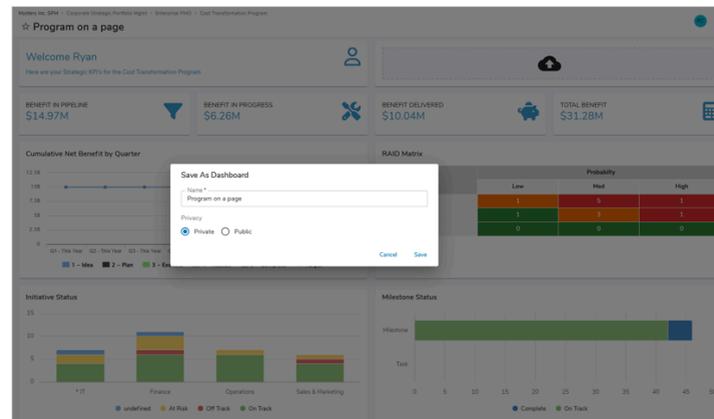
- Previously, we introduced the Save As Dashboard capability to allow you to instantly create a dashboard using the pre-defined layout of a work item. If you had filtered the content on the work item those filters were applied as defaults on the newly created dashboard.
- Being able to use the sophisticated layouts from work items provided dashboard configuration acceleration. Many clients wanted the same capability for their sophisticated legacy dashboards.
- Now, 'Save As' has been brought to our legacy dashboards, providing the means to bring them into the inventory displayed on Dashboard Central.

Applicable to

- Dashboards

Set up

- On a Legacy Dashboard, open the 'More Actions' dialog.
- Select the 'Save As' option, define the Name and Privacy for the new centralized Dashboard. Choosing 'Save' will create the new Dashboard within Dashboard Central and bring you to it.



Notes

- When using 'Save As' on a Legacy Dashboard, the Context of the new Dashboard will be the same Context which the Legacy Dashboard existed on. The Context is not editable.
- If there is a section on the Dashboard with elevated Context settings (boosted visibility), the 'Save As' option will not be available.
- The newly created Dashboards will provide the ability to view, but not configure Custom, List, and View sections.

Import/Export: Downloadable Import Error Messages

Summary

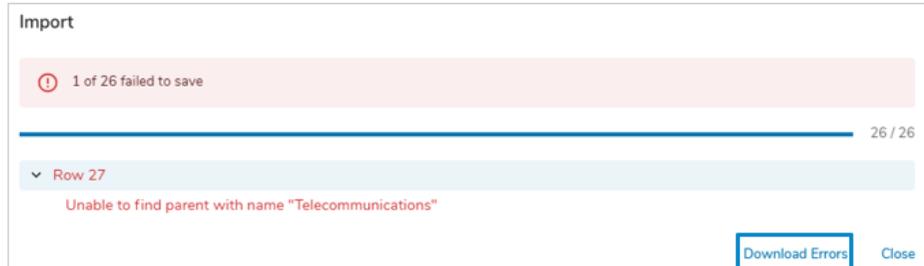
- The Import/Export section previously received an enhancement introducing new progress indicators to convey the status of an import and detailed error messages for more efficient resolution.
- The enhancement was well-received, however feedback from clients cited the challenge of responding to the error messages displayed on the Import dialog because the list of errors is lost when the dialog is closed.
- Now, the log of error messages can be downloaded for review and investigation.

Applicable to

- Import/Export

Set up

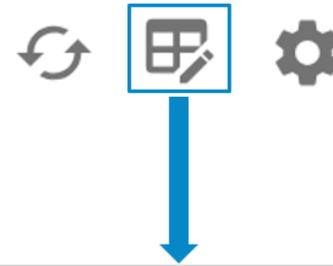
- When an Import includes errors, select the 'Download Errors' button on the bottom right of the Import dialog.
- The row(s) which caused the error(s) are listed within an Excel file.



Tables: Move Bulk Edit option out of settings gear

Summary

- Previously, the Bulk Edit option was introduced to provide a fast and efficient way to update multiple rows of data. It was accessible from the Settings menu on Table sections.
- With the wide adoption of this feature, clients requested a more visible location for the Bulk Edit option.
- Now, next to the Settings gear on Table sections, there is a Bulk Edit icon to toggle into Bulk Edit mode.



Applicable to

- Tables

Set up

- No set up required. The Bulk Edit icon will be visible alongside the Settings icon on all Table Sections.
- All previous Bulk Edit functionality still applies.

Bulk Edit						
Name	Stage	Owner	Net Benefit - Plan	Net Benefit - Forecast	Net Benefit - Actual	Workstream
*AI Powered Cash Applic...	● O...	2 - Plan	465000	465000	0	*Finance
*Consolidate Supplier Lig...	● O...	4 - Realize	820000	650000	0	*Finance
AI Invoice Processing w/...	● A...	4 - Realize	170000	95000	60000	*Finance
Dynamic Pricing Strategy ...	● O...	3 - Execute	470000	340000	0	*Finance
Smart Energy Consumpti...	● O...	3 - Execute	240000	210000	0	*Finance
*Shutdown a Remote Off...	● O...	2 - Plan	750000	750000	0	*Operations
Adopt LEAN Methodolog...	● O...	2 - Plan	500000	500000	0	*Operations
Migrate to Oracle ERP Cl...	● O...	2 - Plan				*Operations
Outsource Customer Serv...	● O...	2 - Plan				*Operations
Streamline QA Workflow...	● O...	1 - Idea				*Operations
Use Tableau for Predictive...	● O...	1 - Idea				*Operations
Employee Self-Service Po...	● O...	5 - Complete	440000	390000	0	HR & Legal
Flexible Work Arrangeme...	● O...	2 - Plan	375000	375000	0	HR & Legal
Implement Learning Mana...	● O...	4 - Realize	775000	525000	92000	HR & Legal
Outsource Recruitment	● O...	3 - Execute	400000	350000	0	HR & Legal
Automation using Autom...	● O...	2 - Plan	400000	400000	0	IT
Azure Cloud Migration	● O...	3 - Execute	1233333.3333333333	1200000	0	IT
Centralized Helpdesk Sup...	● O...	5 - Complete				IT
Optimize Software Licen...	● O...	4 - Realize	600000	600000	850000	IT
Virtualization Migration...	● O...	1 - Idea				IT
Lead Measurement (Metric)	● O...	3 - Plan	100000	100000	0	Sales & Marketing

Tables: Metric Drill Down

Summary

- Previously Drill Down was made available in Card and Chart sections, enabling users to investigate the individual work items contributing to aggregated values.
- However, many solutions rely on Table sections for a comprehensive view of metrics across data sets (e.g., Target vs. Actual for Revenue) where visibility into the contributing data of the Metric value was limited.
- Now, Drill Down is enabled on all Metric Columns within Tables, allowing users to review the underlying work items contributing to any metric value. For simple aggregations, results are broken down by the metric's time period (e.g., Monthly, Weekly); for complex expressions, the formula and output value are clearly displayed.

Applicable to

- Tables, Metric Columns

Set up

- No setup required. All Metric Columns within Tables will have Drill Down enabled.

Percent Achievement - Actual (May 31, 2025)

$\text{if}(\text{isEmpty}(\text{KPI.Target}(80)),0,\text{KPI.Actual}(-)/\text{KPI.Target}(80))= 0\%$

1

Budget Remaining - Plan (May 2025)

Period ↑	Value
May 1, 2025	737K
May 2, 2025	737K
May 3, 2025	737K
May 4, 2025	737K
May 5, 2025	737K
May 6, 2025	737K
May 7, 2025	737K
May 8, 2025	737K
May 9, 2025	737K
May 10, 2025	737K
May 11, 2025	737K

Hide Blank Results Close

Metric Drill Down Examples

1. Expression
2. Aggregation