233.0 Release Notes

28 June 2025

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AI Recommend Value: Multiple Descendant Types

Summary

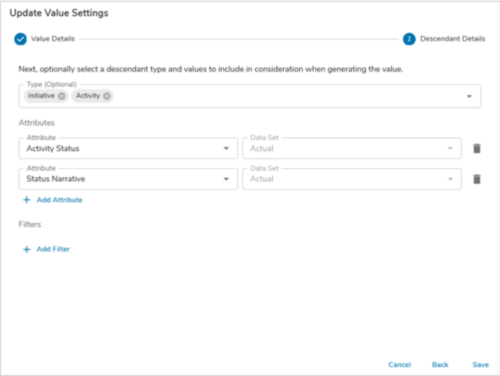
- Previously, AI Recommend Value enabled you to generate recommended data entry for attributes based on values held on descendant items. E.g., it could recommend the Status Update for a Workstream based upon the descendant Initiative Status Updates.
- Based on the positive reception of the feature, it became evident that clients wanted to be able to assess values from multiple descendant types to derive the recommended value.
- Now, App Admins can configure AI Recommend Value to review data from multiple descendant types.

Applicable to

- All ancestor work items in Enterprises where AI has been enabled

Set up

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



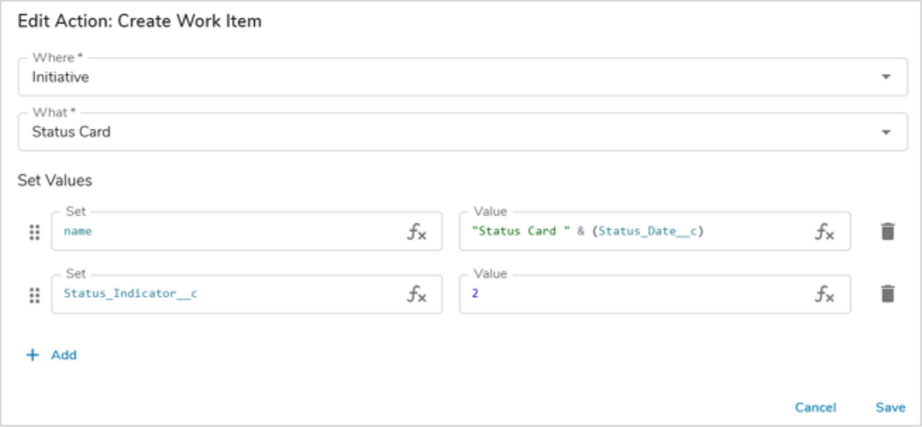
Set up cont.

- Select one or more descendant template types and the attribute values to be evaluated. Optionally, add filters to scope which descendant 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.

Create Work Item BR action can set multiple values

Summary

- Previously, when configuring Create Work Item business rule actions, App Admins had the ability to define the Name of the new work item.
- App Admins used this capability frequently to e.g., generate Status Update work items for cadenced reporting. However, these Status Updates were limited to having only their Name pre-defined. App Admins then configured On Create Business Rules to assign additional values to other attributes.
- Now, the Create Work Item action is more efficient and can include all attribute values that should be set on the new work item.



Applicable to

- Business Rules, Create Work Item Action

Set up

- On a Template, open the Data Panel and select Business Rules.
- From a new or existing Business Rule, select the blue '+' from either the 'If True' or 'If False' section to open the Add Action options.

Set up cont.

- Choose the 'Create Work Item' option from the Add Action options.
- Define 'Where' and 'What' for the creation of the work item.
- Through the use of expression language, reference an attribute within the 'Set' field. Then define the 'Value' for the attribute upon creation of the work item.
- Save and Publish your changes.

Charts: Gap to Target

Summary

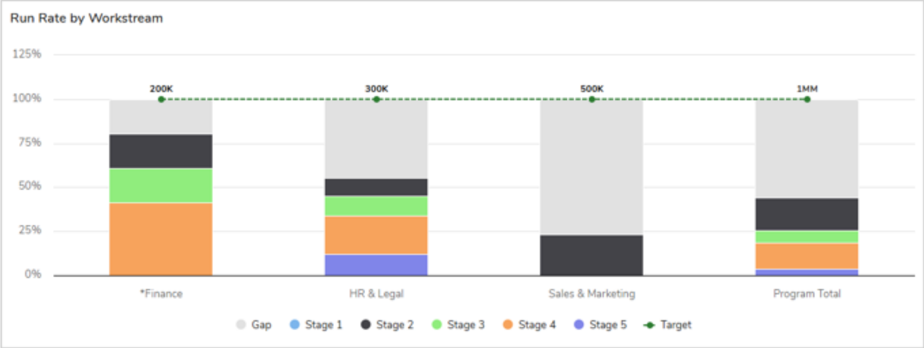
- Previously, App Admins were able to display a Gap to Target chart using the capabilities available from a View section to access content from the Util server.
- This Chart identifies what percentage of a goal has been achieved and how much remains (the gap) across categories. The Util server charts, while powerful, can be more difficult to configure and less performant than native sections. They are also Read Only when included on Dashboards.
- Now, to continue to provide easily-configurable, performant, visualization options, Shibumi has introduced a native Gap to Target chart.

Applicable to

- Charts

Set up

- On a Template or Dashboard while in Configure mode, open the 'Add Section' dialog. Select 'Gap to Target' from the Chart tab.
- Define one or more template types for the Datasource of the Chart.



Set up cont.

- On the Display tab, define the X Axis grouping (Item Name, None, Association, Pick List, or Checkbox).
- Define one or more Value(s) for the Chart. Choose from any available Attribute or Metric present on the defined template type(s).
- Choose from the available options (Item Name, None, Association, Pick List, or Checkbox) to define the Y Axis slices.
- Optionally, format the 'Gap' value's Label and Color for the Chart.
- Define an Attribute or Metric (data set and timeframe needed for Metrics) for the Y Axis Target Line, optionally configure the label and color as well. Under the Options section, determine whether an aggregated Total column, Chart legend, or Values are shown.

Tables: Metric Data Sets

Summary

- Previously, App Admins configured Metric List/View sections to enable their solutions to compare key performance metrics for tracking progress, identifying gaps, and driving strategic decisions.
- With large volumes of data, these sections hit performance constraints.
- Now, the extremely performant Metric Data Set Table section is available, providing a flexible, powerful way to view and compare multiple data sets, across multiple time-periods, for multiple metrics.

Financial Benefits	This Year			
	Q1-2025	Q2-2025	Q3-2025	Q4-2025
CapEx				
Cumulative Benefit				
Plan	125,000	408,333	708,333	1,008,333
Forecast	125,000	400,000	687,500	975,000
Target	500,000	500,000	500,000	500,000
OpEx				
Cumulative Benefit				
Plan	562,500	1,416,667	2,429,167	3,283,333
Forecast	445,833	1,194,583	2,070,833	2,830,417
Target	600,000	600,000	600,000	600,000
Revenue				
Cumulative Benefit				
Plan	66,667	500,000	975,000	1,450,000
Forecast	66,667	478,333	920,833	1,363,333
Target	800,000	800,000	800,000	800,000

Applicable to

- Tables

Set up

- On a Dashboard or Template in Configure mode, open the 'Add Section' dialog. From the Table tab, select the 'Metrics' option.
- From the Section Controls, select the Settings option.
- In the Table Settings dialog, define the template type(s). Select the '+ Add Metric' option to define one or more Metrics to display.

Set up cont.

- By default, the Actual and Plan Data Sets will be included for Display. Add, remove, and reorder the Data Sets as needed.
- Optionally, Enable the Preview Pane, Bulk Edit, or any Filters. Save.
- Note: *If "This" is the only source context, filters cannot be applied. Additionally, if multiple template types are selected then only Metrics and Data Sets present on* ***all*** *selected templates will be available to display on the Metric Table section.*

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