234.1-5 & 235.0 Release Notes

23 August 2025

234.1-5 Contents

Issue Resolutions

- Custom Status Card section not displaying status color
- Incorrect calculations when using addMonths function
- Incorrect calculations when using addDays function
- Pick List color displaying incorrectly in Metric Views
- Card cannot Save when selecting an OOTB attribute from "Attribute" option
- Exported chart image displays black instead of selected colors

shibumi

235.0 Contents

Enhancements

- AI Recommend Content & Value: Include Attachments
- Board: Create Work Items, AI Recommend Content
- Board: Page Filter Columns by Data Set
- Date & Text Metrics: Card & Export/Import Sections
- Metric Timeframe Chart: Drill Down
- Pick Lists: Data Sets
- Sidebar Create: Define higher ancestor
- Shibumi AI: Separate Chatbot from AI Actions

Issue Resolutions

- Copied checkbox attribute displays a "-" in create form dialog
- Card Drill Down not displaying calculated attribute in Additional Columns

Sunset Notice

- Beginning with Release 237 which is scheduled to be deployed September 27th, the ability to import an App that was exported more than 12 months prior will no longer be supported. If you have any questions or concerns, please contact your Shibumi Account Representative.

shibumi

AI Recommend Content & Value: Include Attachments

Summary

- Previously, attribute values could be incorporated into dynamic prompts submitted using the AI Recommendation actions.
- To strengthen this offering, the AI Recommend actions can now also leverage content within attachments to generate work items or update values.
- With this capability, for example, if an Initiative Owner attaches a Business Case Document to the Initiative. AI Recommend Value can review the document to assign a prioritization score for the Initiative.

Applicable to

- AI Recommend: Content & Value, Attachments

Set up Recommend Content/Update Value

- On a Template, open the Data Panel and select the AI Actions tab.
- Follow the prompts to define the desired configuration for a 'Create Work Item' or 'Update Value' AI Action.

Set up Recommend Content/Update Value cont.

- To include an Attachment attribute, for either action, first select a Context which can be the current item, ancestors, or associated items.
- Once a Context has been selected, choose the Attachment attribute.
- Additional Attachment attributes can be defined if needed.
- Configure a Table/Board (Recommend Content) or Edit Form (Recommend Value) to use the respective AI Action.
- Save and Publish your changes.

shibumi

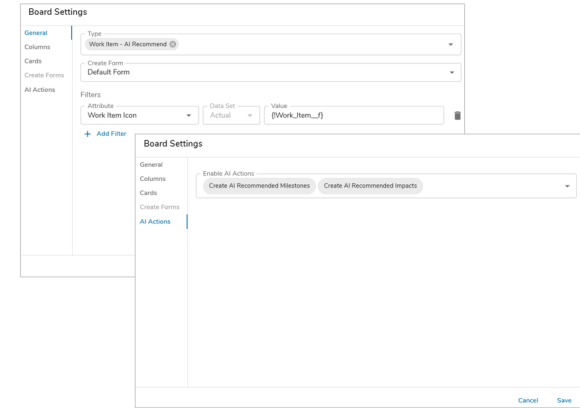# Board: Create Work Items & AI Recommend Content

Summary

- Previously, Board sections could display existing work items with columns organizing content based on association or pick list values. One common application was to show proposed/approved Initiatives for a Scenario in a Scenario Modeling Exercise.
- While displaying existing content was helpful, having the ability to Create content from the Board section would further enhance this use case.
- Now, App Admins can configure their Board sections to create new work items. An exciting additional benefit of introducing this capability to the Board sections is that it also enables App Admins to configure the section to have the AI Recommend Content capability.

Applicable to

- Boards, AI Recommend Content

Set up Create from Board

- On a Template or Dashboard, while in Configure mode, select the Settings gear from the Section Controls on a Board Section.
- With the Board Settings dialog open, select either Default Form or Custom Form from the Create Form drop down. This will enable the creation of work items from the Board.

Set Up Create from Board cont.

- Optionally, if Custom Form is selected, configure the layout of the Create Form for the Board.
- Optionally, if an applicable AI Recommend Content has been configured, from a Board Section's Settings dialog, select the AI Actions tab. In the 'Enable AI Actions' drop down, choose from the available AI Actions that have been configured for the defined template type.
- Save and Publish your changes.

shibumi
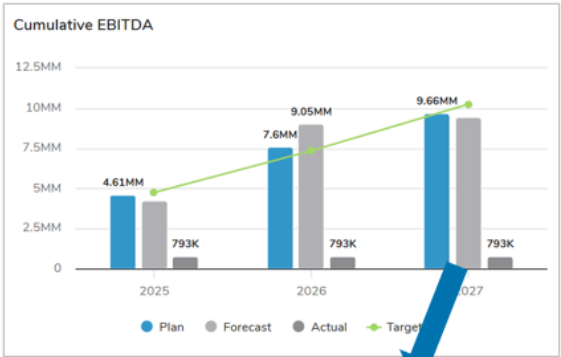
Metric Timeframe Chart: Drill Down

Summary

- Previously, clients included Metric Timeframe Charts in their solutions to visualize key Program data over time.
- While these charts made it easy to identify trends and to assess contributions towards a total value, there was no simple method to investigate the displayed values to, for example, determine the individual contributions of each work item.
- Now, Drill Down is provided on all Metric Timeframe Charts and, by default, will display a table of items based on the selected column, column slice, or line.

Applicable to

- Metric Timeframe Charts

Set up

- No setup required, Drill Down is automatically enabled on all existing and new Metric Timeframe Charts.
- For Stacked Column Charts: The selected slice in the column will be displayed in the drill down dialog's breadcrumb trail.

shibumi

Pick Lists: Data Sets

Summary

- Previously, to use a Pick List attribute to define inclusion in separate Scenarios, it required configuration of a Pick List for each scenario (Scenario 1 Inclusion, Scenario 2 Inclusion, etc.).

- The Pick List options would indicate whether to include or exclude an Initiative within each Scenario. This approach was time consuming and required advanced Shibumi knowledge to successfully implement.

- Now, we have introduced Data Sets to Pick Lists which streamline the Scenario Modeling use case since the different Data Sets within a single Pick List attribute could represent each Scenario under consideration.

- Of course, this capability can also be used for other purposes, e.g., Best, Worst, and Likely Initiative Implementation Complexity assessments.

Applicable to

- Pick Lists

Set up

- On a Template, toggle the Data Panel and select the 'Edit Attribute' icon (pencil) on a Pick List attribute.

- On the General tab of the Pick List settings dialog, select the 'Enable Data Sets' checkbox. This will enable the separate data set drop downs on the Edit Rules tab of the settings dialog.

- Optionally, define editability rules for each of the data sets.

- Save and Publish your changes.

- Note: *Table, Card, Board, Export/Import, Custom Sections, and Charts (Actual only) can all display data set enabled Pick Lists.*

shibumi