

# 235.1 & 236.0 Release Notes

06 September 2025

# 235.1 Contents

## Issue Resolutions

- Scheduled business rule execution is being delayed

# 236.0 Contents

## Enhancements

- AI Create Dashboard: Default to current item context
- Business Rules: Initiate AI Actions
- SSO: Send role notification to pending SSO-required users

## Issue Resolutions

- SSO users who don't have a Shibumi role see 'Whitelabel error' page
- AI Update Value hallucinating when there are no child items
- Associations with same names but different types show error in Table column
- Label formatting is preventing column display in metric timeframe charts

## 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.

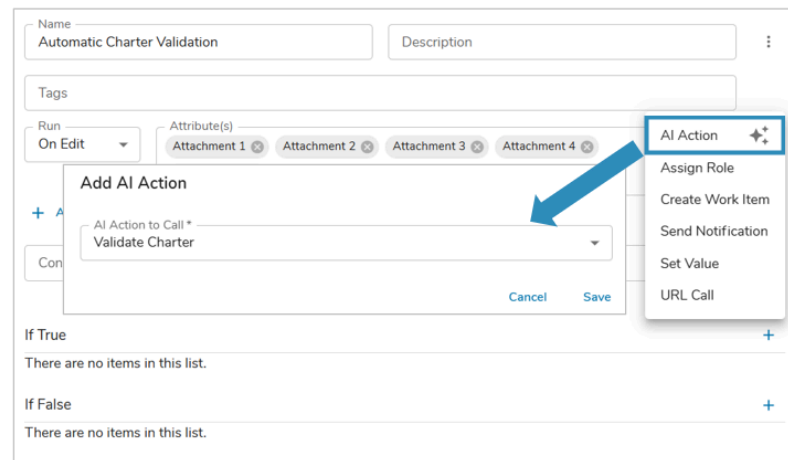
# Business Rules: Initiate AI Actions

## Summary

- Previously, AI Actions could be embedded in your solution and initiated directly by the user. For example, selecting the AI Action icon on a Form or Table allowed tasks such as creating new work items or updating attribute values.
- A natural next step is to advance from user-initiated AI to Agentic AI, where AI Agents act alongside teams to progress Program work. To achieve this, clients need AI Actions to run in response to defined business conditions - for example, automatically summarizing an Initiative's Status Narrative on a Weekly cadence.
- Now, AI Actions can be initiated through Business Rules, combining Shibumi's automation framework with embedded AI to create AI Agents. These Agents provide support for your team, e.g., proactively updating fields, generating work items, or producing status updates based on triggers or schedules. This allows the human team members to invest their time in areas requiring their critical oversight and involvement.

## Applicable to

- Business Rules, AI Actions



The screenshot displays the 'Automatic Charter Validation' business rule configuration. At the top, there are fields for 'Name' (Automatic Charter Validation) and 'Description'. Below these are 'Tags' and a 'Run' dropdown set to 'On Edit'. A section for 'Attribute(s)' contains four attachment buttons: 'Attachment 1', 'Attachment 2', 'Attachment 3', and 'Attachment 4'. A blue arrow points from the 'Attachment 1' button to the 'Add AI Action' dialog box. The dialog box has a title 'Add AI Action' and a dropdown menu labeled 'AI Action to Call \*' with 'Validate Charter' selected. To the right of the dialog, a menu is open showing options: 'AI Action' (highlighted with a blue box and a plus icon), 'Assign Role', 'Create Work Item', 'Send Notification', 'Set Value', and 'URL Call'. At the bottom of the dialog are 'Cancel' and 'Save' buttons. Below the dialog, there are sections for 'If True' and 'If False', each with a plus icon and the text 'There are no items in this list.'

## Set up

- On a Template with a configured AI Action, toggle the Data Panel and select the Business Rules Tab. On a new or existing Business Rule, select the blue '+' on If True or If False. Choose AI Action.
- With the 'Add AI Action' dialog open, choose from one of the available AI Actions for the Business Rule to call.
- Save and Publish your changes.