shibumi

239.1-4 & 240.0 Release Notes

13 December 2025

239.1-4 & 240.0 Contents

240.0 Enhancements

- AI Analyze: Define program data to be reviewed
- AI Create Dashboard: Add any data sets
- Audit Service: Default Values from Template and OOTB Attributes
- Business Rules: Trigger a rule on a child or associated item
- Charts: Heatmap
- Shibumi AI: Leverage attribute descriptions

239.1-4 Issue Resolutions

- Association Tables reverted to default Edit/Create Forms
- Business Rules: Adding more than one 'Set Value' action fails

240.0 Issue Resolutions

- Descendant attributes included in AI Update Value reorder on save
- SSO service allows adding "@domain.com" instead of "domain.com"
- Typeahead not working for dashboard Item Name filter

AI Analyze: Define program data

Summary

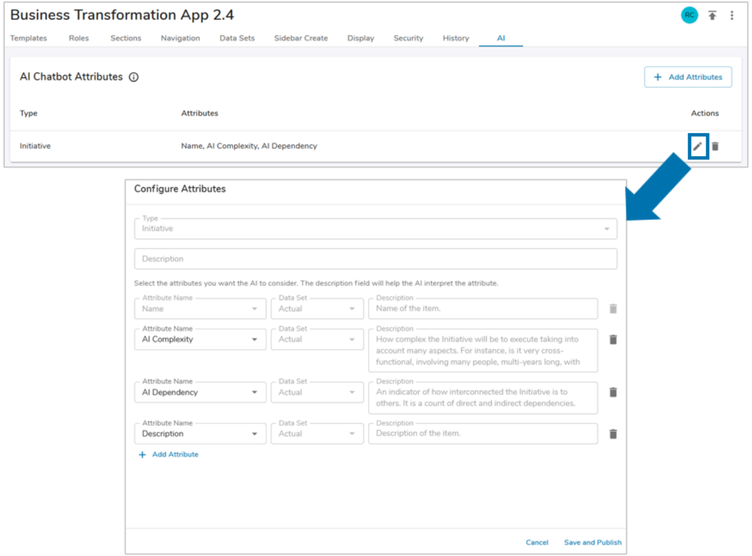
- Previously, AI Analyze allowed users to ask natural-language questions from a chatbot window. To respond, the AI analyzed a key template and a set of score attributes which were configured by the App Admin.
- While this capability provided program insights, it was scoped to a single template due to AI's token size constraints. As AI has evolved, token size is no longer a limiting factor.
- Now, App Admins can configure Analyze to include multiple templates and attributes which provide the AI with the ability to review a broader scope of data, ultimately enabling greater accuracy and more comprehensive responses to user prompts.

Applicable to

- AI Analyze, Apps

Set up

- As an App Admin in an Enterprise with AI enabled, select 'Apps' from the Sidebar and navigate to an App Detail Page.



Set up cont.

- Select the 'AI' Tab. To define a new template for AI Analyze, select the 'Add Attributes' button. Choose a template type, Name will be included by default. Select 'Add Attribute' and choose an attribute. The chosen attribute's definition will be automatically included. Follow the same process to add more attributes if desired.
- Save and Publish. Click the edit icon (pencil) for an existing template to add or remove attributes.
- Note: *Admin Only attributes are not available for AI Analyze.*

Business Rule: Trigger a rule on a child or associated item

Summary

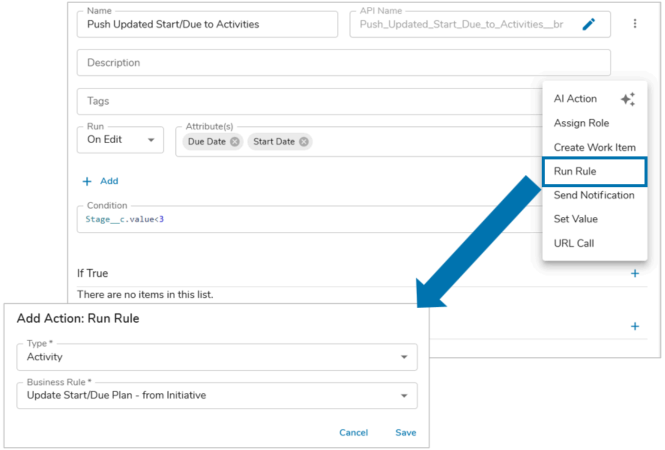
- Previously, Business Rules could automate updates on the current item, enabling consistent processes and reducing manual work. However, automation was limited to the item where the rule was defined, leaving related items (child/associated items) dependent on separate, manually initiated updates.
- Many real-world processes, such as aligning milestone approvals with initiative stages or adjusting dependent dates, required coordinated updates across related items. Admins often had to create redundant rules or rely on manual intervention to keep items in sync.
- Now, a new Business Rule action allows rules to be initiated on child or associated items, enabling more dynamic and coordinated automation patterns.

Applicable to

- Business Rules

Set up

- On a Template, open the Data Panel and select Business Rules tab.



Set up cont.

- Select the '+ Add Rule' button. Define a Name and select 'Create'.
- Define one or more Run triggers, and its respective attribute(s).
- Define a condition for the Business Rule, under 'If True' click on the blue '+' and choose the 'Run Rule' option.
- Select a child or associated template type, based on the template type a drop down list of available Business Rules will be provided. Choose a Rule from the drop down and select Save. Publish.

Charts: Heatmap

Summary

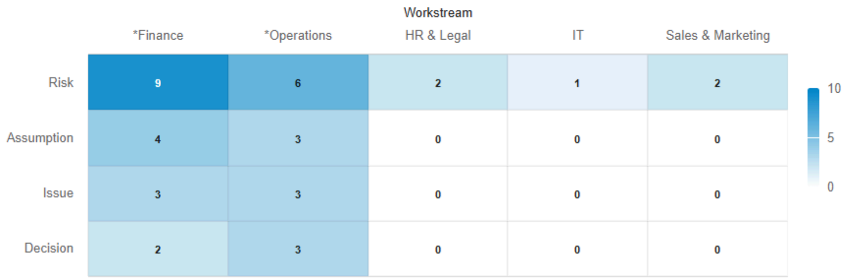
- Previously, Shibumi offered a range of charts to visualize performance, progress, and trends; however, users lacked a way to quickly understand intensity, concentration, or distribution across intersecting dimensions.
- Identifying patterns, such as where issues were clustering or which areas required attention, often required manual analysis or multiple chart types..
- Now, Heatmap introduces a new, highly visual option for exploring program data. The chart displays either the count of items or an aggregated value (e.g., sum, average) for the intersecting cell. Additionally, built-in hover and drill down interactions deepen analysis by providing detailed context behind each cell.

Applicable to

- Charts

Set up

- On a Template or Dashboard in Configure Mode, open the Add Section dialog and select 'Heatmap' under the 'Chart' tab.
- Open the Settings for the chart, on the Data tab define one or more template Type(s). Optionally, configure filters for the section.



Set up

- On the Display tab, choose from a Pick List or Association for the Value of the X and Y axis, separately.
- Define the Value for each cell, with unique configuration as follows:
  - **Attribute Aggregation:** Select a Number, Metric, or Value Pick List attribute. Define the Aggregation method.
  - **Record Count:** Provides a count of work items.
- Under Options, define the Starting/Ending Color, whether a legend is displayed, whether the value in each cell is shown, and whether totals for rows and columns are displayed.
- If Total columns are enabled, define the total cell color and labels. Save and Publish your changes.