245.0 Release Notes

04 April 2026

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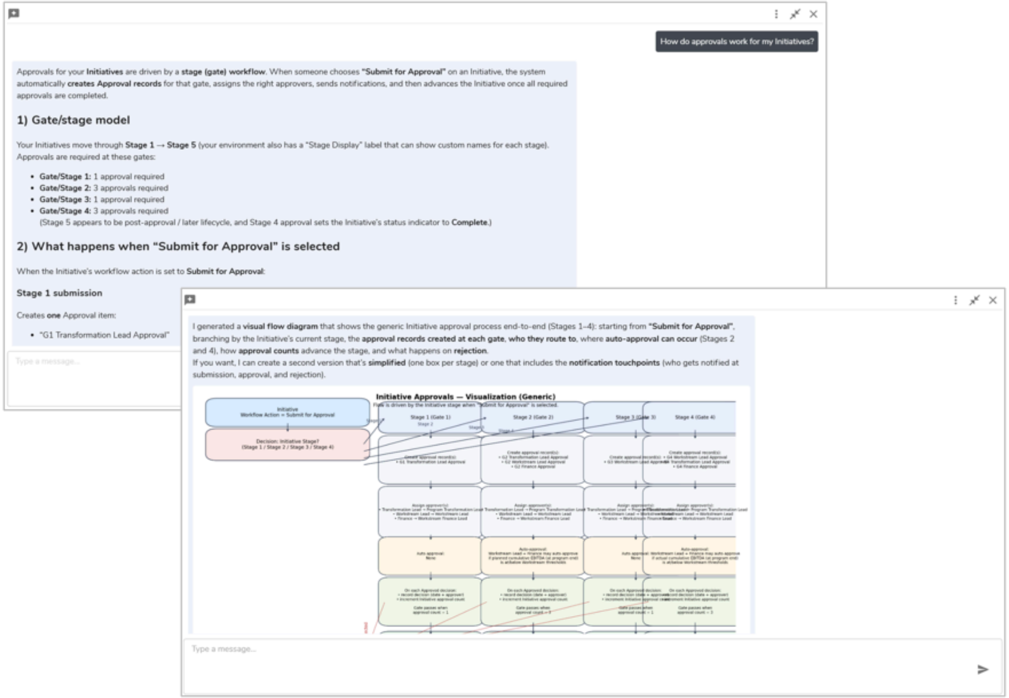
Issue Resolutions

- Excel not assigning correct data type to exported date and number columns
- Syntax highlighting fails for != symbol
- AI Chatbot window opens displaying beginning of chat conversation
- Search results list Types in API name order instead of Name order
- Date defaults on templates display as a numerical value in audit history
- Unable to copy / paste calculated columns in Tables from Bulk Edit
- Attachment won't load when Hyperlink is Required but Hidden

AI Analyze: Program Structure and Logic

Summary

- Previously, AI Analyze enabled App Admins to define which program data could be shared, initially supporting a single Template with a limited set of attributes, and later expanding to multiple Templates and attributes.
- While powerful for analysis of program data, more comprehensive responses could be provided if AI better understood how the program was structured and operated.
- Now, AI Analyze includes a full understanding of program data, program structure, and program logic. By combining structural intelligence with this depth of knowledge, AI Analyze evolves into a comprehensive assistant capable of answering a broad spectrum of questions about both methodology and program achievement.



Applicable to

- AI Analyze

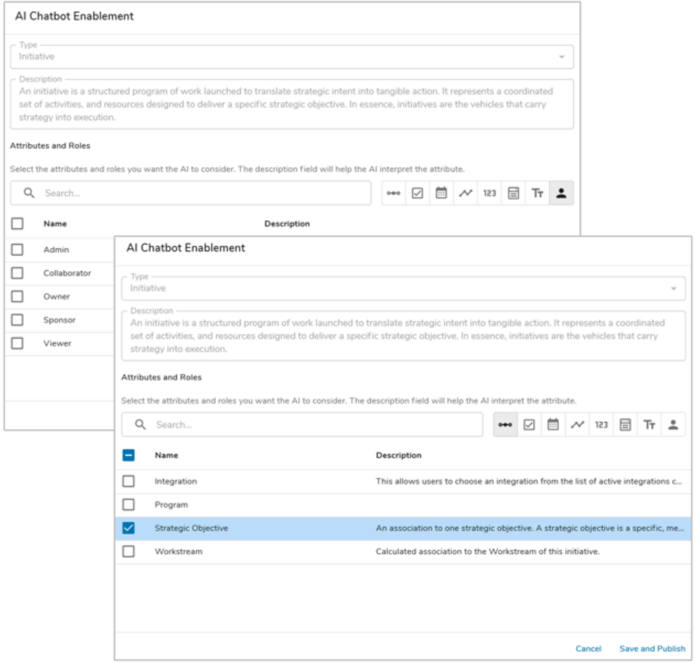
Set up

- No setup required

AI Analyze: Roles and Associations

Summary

- Previously, AI Analyze supported insights based on configured attributes and metrics, providing governance for App Admins to define which data points could be included in analysis.
- As Shibumi AI continues to evolve, we are introducing the ability to understand relationship and owner structures defining how work is connected and managed. Without Roles and Associations, analysis lacked important contextual depth.
- Now, AI Analyze includes Roles and Associations as part of the data that can be configured and analyzed. This enhancement provides a more holistic view of solution data, enabling richer insights that reflect not only attribute and metric values, but also demonstrate how work items are connected and who is responsible for them.



Applicable to

- AI Analyze, Roles, Associations

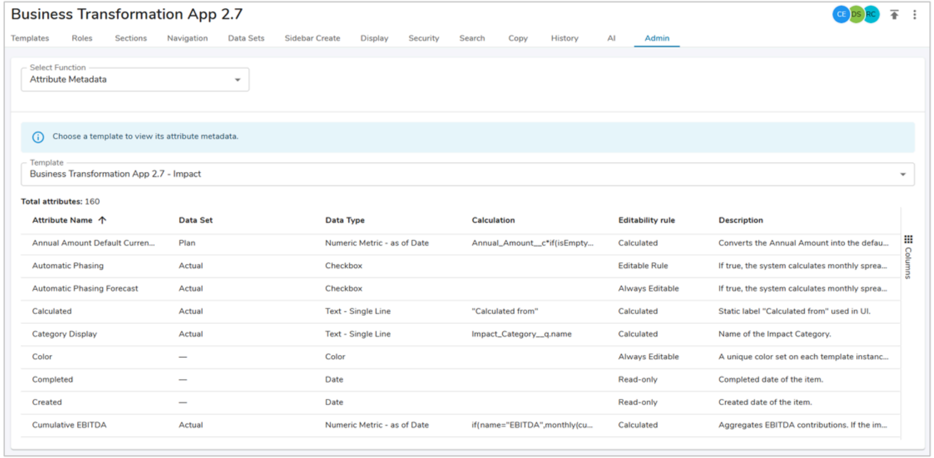
Set up

- As an App Admin, navigate to the AI tab on an App. Select the Edit icon for one of the configured template types to be included for consideration in the AI Chatbot.
- Select the Association/Role icon, choose one or multiple attributes. Click 'Save and Publish'.

App Administration: Attribute Metadata Report

Summary

- Previously, App Admins were required to navigate across Templates and into individual attribute settings dialogs to fully understand data collected by the program.
- This lack of a consolidated view made it challenging to produce solution documentation and to onboard new App Admins.
- Now, App Admins can leverage the Attribute Metadata Report to view attributes by Template in a centralized format. The report includes key details such as API Name, Data Type, Calculations, and Descriptions, providing greater visibility into attribute configuration and supporting improved governance and solution management.



Applicable to

- App Admin Functions

Set up

- As an App Admin, select the 'Apps' icon from the sidebar. Choose the desired App Name from the list and navigate to the Admin tab.

Set up cont.

- From the 'Select Function' drop down, choose the 'Attribute Metadata' option. From the Template drop down, choose a Template.
- Additional Columns can be added via the 'Columns' toggle on the right side of the screen. From here, you can review details for every attribute on the selected Template.

Card: Hover Text on Drill Down

Summary

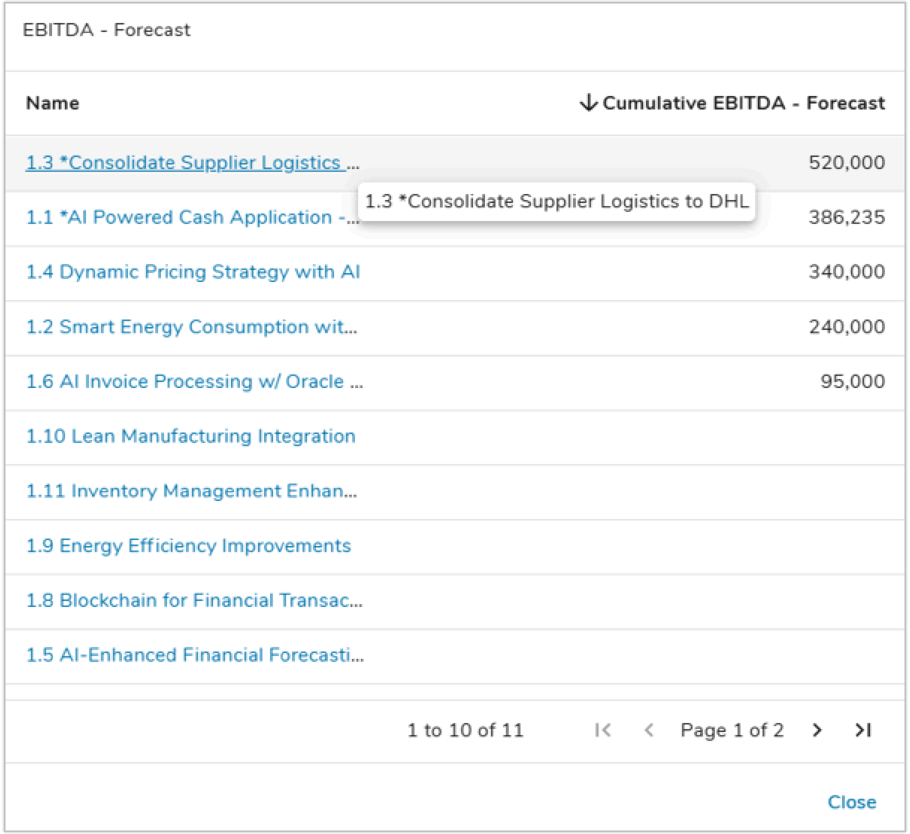
- Previously, hover text was made available on Card sections, allowing users to view additional context for values displayed directly on the card.
- When drilling down into Card data, column values on the Drill Down dialog could be truncated due to space constraints, limiting users' ability to fully interpret the information without navigating elsewhere.
- Now, hover text is available within the Card Drill Down dialog. This ensures greater clarity and improves the usability of detailed data views without requiring additional configuration or navigation.

Applicable to

- Cards, Card Drill Down

Set up

- No set up required.



Charts: Group by Date for non-metric Multi-Axis Charts

Summary

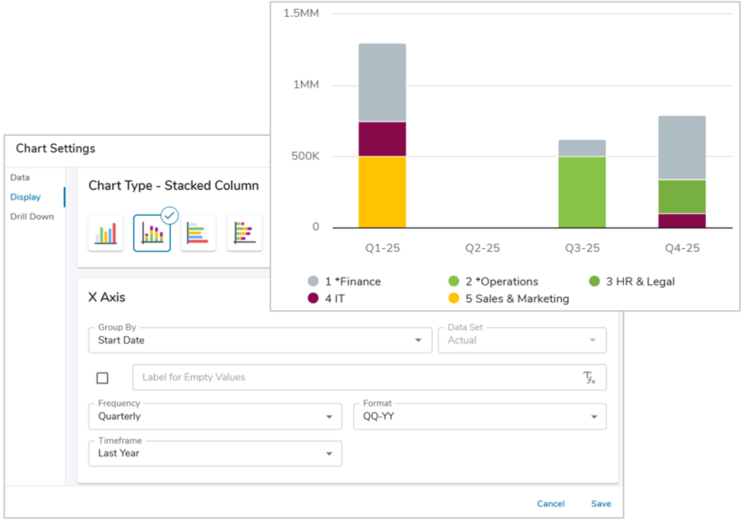
- Previously, multi-axis charts allowed users to group data by categorical attributes, but did not support grouping by date attributes.
- Users often needed to analyze and visualize data across time using date attributes, for example, a common chart shows the number of new Initiatives grouped by start date.
- Now, users can group Multi-Axis Charts by date attributes, enabling time-based visualizations of operational or lifecycle data tied to key dates.

Applicable to

- Multi-Axis Charts (Bar, Column, Stacked Bar, Stacked Column, 100% Stacked, Gap-to-Target)

Set up

- On a Layout or Dashboard, open the Add Section dialog and select Chart from the left panel. Click on a Multi-Axis Chart type (for this example, Stacked Column was selected). Define the Datasource.



Set up cont.

- On the Display tab, define the X Axis grouping from the available Date attributes. Define the Frequency, Format, and Timeframe.
- Next define the Y Axis Values by selecting either Attribute Aggregation or Record Count. For Attribute Aggregation, select a numeric attribute or metric. Add additional values as desired.
- Define optional settings as desired. Save.

Color Gradient for Heatmap based on Pick List Value

Summary

- Previously, Heatmap Charts provided the ability to apply a color gradient across all data.
- As clients applied this chart to their solutions, they identified a need for a more granular gradient that could be applied based on Pick List options. For example, a team monitoring risk scores across Workstreams needed to define separate color gradients for each risk rating.
- Now, App Admins can assign distinct color gradients based on Pick List values, enabling more meaningful visual differentiation across categories.

Applicable to

- Heatmap Chart

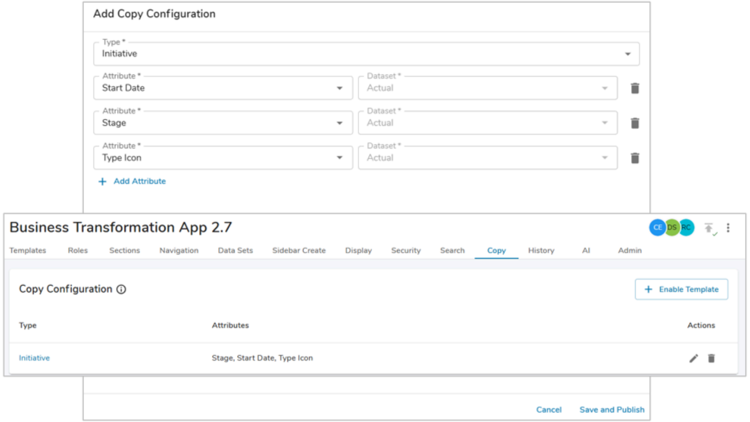
Set up

- Open the settings on a Heatmap Chart with at least one Axis defined as a Pick List, navigate to the Display tab.
- On the Display tab scroll down to the Options section.

Set up cont.

- In the Style drop down, select the Pick List Gradient option for an available Axis.
- Define a Starting Color, this will be the gradient combined with each individual pick list value's color.
- For each Pick List value, define a Color from the available options.
- Save and Publish.

Copy Work Item: Configuration



Summary

- Previously, users could copy work items and App Admins could carefully configure business logic to reset data in the newly copied item.
- The extra maintenance required for App Admins to ensure that only relevant data persisted was tedious and errors could have significant impact on a program. For example, if a user copied an Initiative that had already cleared budget approval, if the App Admin did not reset the approval attributes the newly copied item would also have already cleared budget approval without actually going through that step.
- Now, App Admins can configure which templates allow copying and which attributes are included in the copy action. Attributes not selected will have their values cleared, allowing for a more intentional and controlled copy experience.

Applicable to

- Work Item Copy, App Admin

Set up

- As an App Admin, navigate to the Apps page. Select the desired app by clicking on the App Name. Then navigate to the Copy tab.

Set up cont.

- From the Copy tab, select the '+ Enable Template' button.
- In the Type drop down of the Add Copy Configuration dialog, select a Template and define which Attributes to include along with their respective Data Sets (if applicable).
- Save and Publish.
- Repeat for additional Templates as desired.

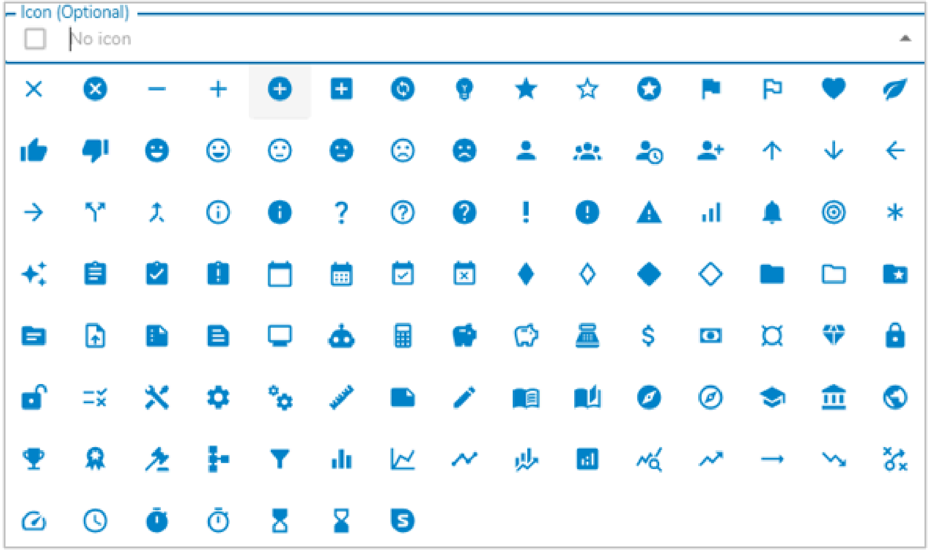
Notes

- Metric and Calculated Attributes cannot be copied
- **On Release, no Templates will be configured to be copied.**

Icons: New icons for Pick List/Tab/Template/Cards

Summary

- Previously, Shibumi provided a set of icons that could be used across select sections and attribute types. Over time, icon usage expanded to help visually classify work item types, dashboards, and other elements within a solution.
- As organizations increasingly relied on icons to quickly identify and differentiate items, additional options were requested to support a broader range of user cases and improve visual clarity across complex solutions.
- Now, Shibumi has introduced an expanded icon library that can be leveraged across Cards, Pick Lists, Tabs, and Templates.



Applicable to

- Cards, Pick Lists, Tabs, Templates

Set up

- No set up required

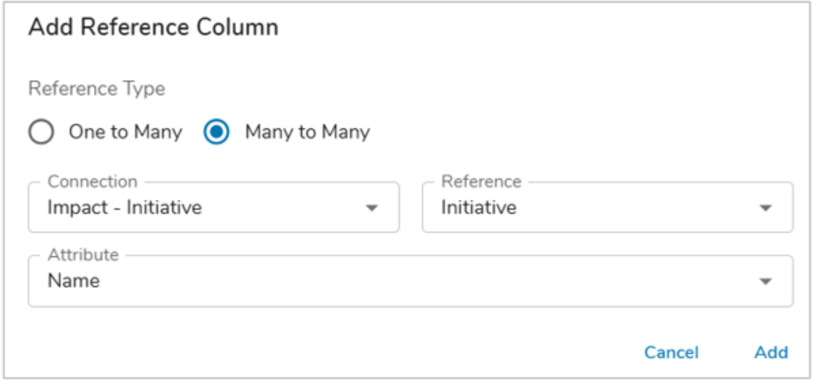
Tables: Many to many associations in Reference Columns

Summary

- Previously, Reference Columns in Table sections were introduced to allow users to display attributes from related work items, but support was limited to descendants and one-to-many associations.
- As programs grew more interconnected, users needed a clearer way to visualize relationships between work items without navigating away from the table. In particular, dependency tracking scenarios - such as identifying predecessors and successors - benefited from being visible alongside the primary work item.
- Now, Tables support referencing attributes from many-to-many associations within Reference Columns. This enables users to display values from multiple associated records in a comma-delimited list, providing a more complete view of related work directly within the table. For example, an Initiative table can display the outline numbers of all predecessor and successor Initiatives, giving teams immediate visibility into dependencies.

Applicable to

- Tables, Reference Columns



Set up

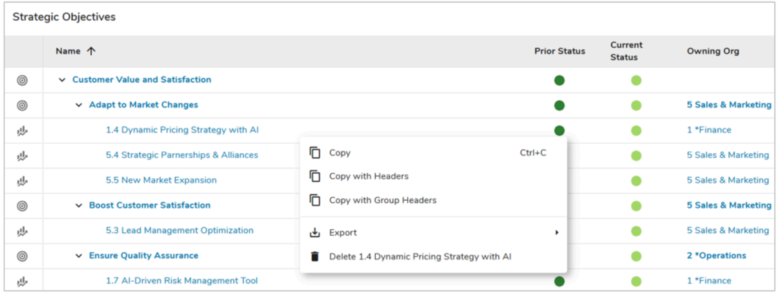
- While in Configure mode select the Table Customize option.
- Select the '+ Add Column' button and choose Reference Column.
- For the Reference Type, select the 'Many to Many' option.
- Define a 'Connection' from available Direct Children, Descendents, or Associations. Then select a Reference from the available associations based on the chosen connection.
- Finally, choose the data that will be displayed within the new column (Name, ID, or Outline Number). Save and Publish.

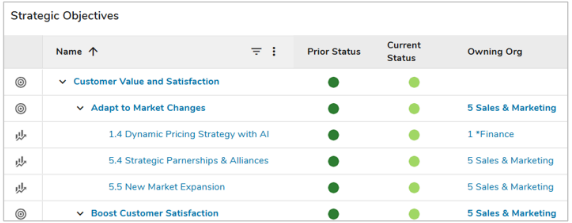
shibumi

Tables: Enhanced UX

Summary

- Table sections provide a powerful way to review and manage work items in Shibumi. In this release, two enhancements improve the user experience when working with the Table.
- Previously, Column widths were defined at the template level and applied consistently for all users, which could make dense datasets difficult to read depending on screen size or the type of information being analyzed. Now, when working with Tables, users can adjust column widths using simple drag-and-drop controls, allowing them to resize columns to better fit their screen and emphasize the information most relevant to their task. These adjustments are session-based and automatically reset to the template-defined configuration upon page refresh.
- In addition, previously when deleting a work item displayed on a Table through the right-click menu, the action was labeled simply as "Delete", without displaying the name of the specific item selected. Now, when deleting a work item the delete option displays the name of the selected item, clearly indicating which record will be removed.





Applicable to

- Tables