241.1-5 & 242.0 Release Notes

07 February 2026

241.1-5 Contents

Issue Resolutions

- Stop sending emails "on behalf of" the users who initiated the email in Shibumi
- Business rules are firing on-create for some attributes when there's a default value on the template
- Can't update user information from remote region

242.0 Contents

Enhancements

- AI Actions: Hidden and Visible prompts
- AI Actions: Automatic retry if connection to OpenAI fails
- AI Chatbot: Include Metrics in AI Analyze
- AI Chatbot: Moveable and resizable chatbot window
- AI Chatbot: Show reasoning for AI Analyze
- AI Chatbot: Support streaming of chatbot responses
- Charts: Filter drill down on Category Waterfall to only show changed values
- Charts: Include Legend on Donut/Pie Chart
- Charts: New Bar Chart
- Charts: New Spider Chart
- Search: Display most relevant search results first
- Search: Support search by email address
- Shibumi AI: Enable AI by default in new enterprises
- Tables: App settings to define table header/column color formatting.

Issue Resolutions

- Trailing whitespace breaks Call URI BR action
- Do not allow leading spaces on Dashboard names
- Scrollbar oddness in Business Rules edit
- History section export not respecting filters and errors out
- Children created from template not logging default Name correctly in audit history
- History for deleted items not retained after restored

Upcoming Maintenance Window

- IP Migration (February 21st)

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AI Actions: Hidden & Visible prompts

Summary

- Previously, AI Actions prompts could be configured to guide users when executing an action. While this supported consistency and functional intent, the prompt configuration was always visible and editable by users.

- App Admins wanted to allow users to adjust parts of a prompt while protecting the underlying logic, context, or instructional details necessary to ensure reliable and consistent results.

- Now, when configuring an AI Action, App Admins can define a Visible prompt, a Hidden Prompt, and can set whether users can add to the prompt. This provides greater flexibility and governance, enabling Admins to protect critical prompt logic while still empowering users to tailor AI Actions to their specific needs.

  - All prompts are sent to the OpenAI for processing.
  - The **Hidden Prompt** is never shown to users and is used to preserve the intent, structure, and/or context.
  - The **Visible Prompt** is displayed to users when they manually initiate the action.

Update Value Settings

Action Details

2 Prompts

All of the prompts and attachments below are sent to the LLM on execution

Visible Prompt *
Recommend an approval decision for this initiative. It is currently in the {!Stage_Display__c} stage. It has been requested to move to the next stage {!Stage__c.value+1}. Include a single line with a recommendation followed by a paragraph explaining the rational.

Hidden Prompt
When considering an approval decision for this Initiative, focus on the {!Estimated_Annual_Benefit_Value__c} and whether the value is worth the potential risk of failure based on the {!AI_Risk__c} score.

This prompt is not displayed to the end user

☑ Allow users to enter additional prompt

Attachment Attributes

+ Add Attachment

Cancel   Back   Save

Applicable to

- AI Actions

Set up

- Open an existing AI Action from a Template's Data Panel. Go to the Prompts section of the edit dialog.

- Enter text/injected expressions into the Visible Prompt and Hidden Prompt fields. Define whether users can enter additional prompt detail by selecting the respective checkbox. Save and Publish your changes.

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AI Chatbot: Include Metrics in AI Analyze

Summary

- Previously, AI Analyze evaluated attribute values on work items to provide insights into overall program health, helping users understand status, risk, and areas requiring attention. While effective for qualitative and point-in-time analysis, metric data was not included as part of the AI evaluation.

- Metrics play a critical role in tracking performance over time and representing key performance indicators. Users wanted AI Analyze to consider metric values - such as trends, historical performance, and time-based changes - so analysis could reflect how programs were performing across a defined period rather than presenting only current-state.

- Now, App Admins can configure AI Analyze to include Metrics and their data sets, as part of the analysis scope. Timeframes do not need to be defined during configuration; instead, users can specify the desired time period directly when interacting with the AI Chatbot. This enables richer, KPI-driven analysis and allows AI Analyze to deliver insights that better reflect performance trends.
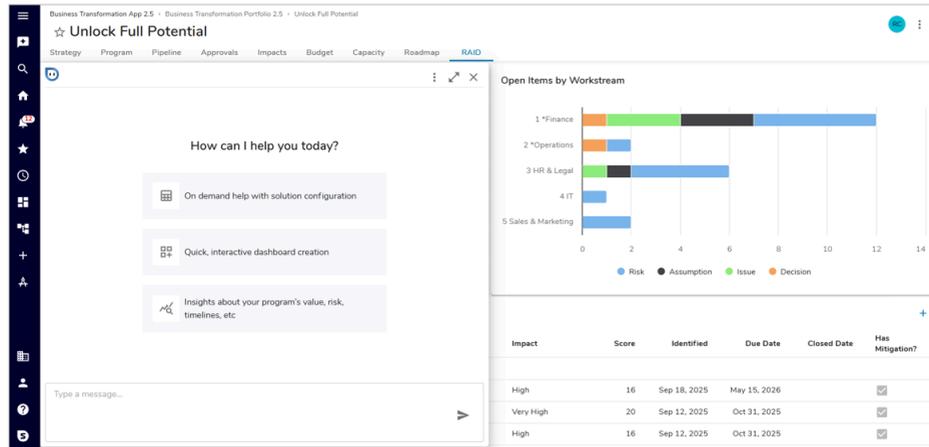
Applicable to

- AI Analyze

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.
- On the Attribute Name drop down, select a Metric from the list.
- Select an available Data Set for the Metric. Save and Publish.

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AI Chatbot: Window adjustment and response streaming

Summary

- Previously, the AI Chatbot opened in a fixed position in the bottom-right corner of the screen, and reponses were delivered as fully rendered blocks of text once processing was complete.

- This static size and location could hide program content, which limited how users could interact with the chatbot alongside their program work.

- Now, the AI Chatbot window can be freely moved and resized, allowing users to place it where it is most effective while working in their solution. Also, responses are now streamed progressively in a natural language flow, creating a more engaging and conversational experience. Together, these improvements enhance usability, improve readability, and make interactions with Shibumi AI feel more intuitive and responsive.
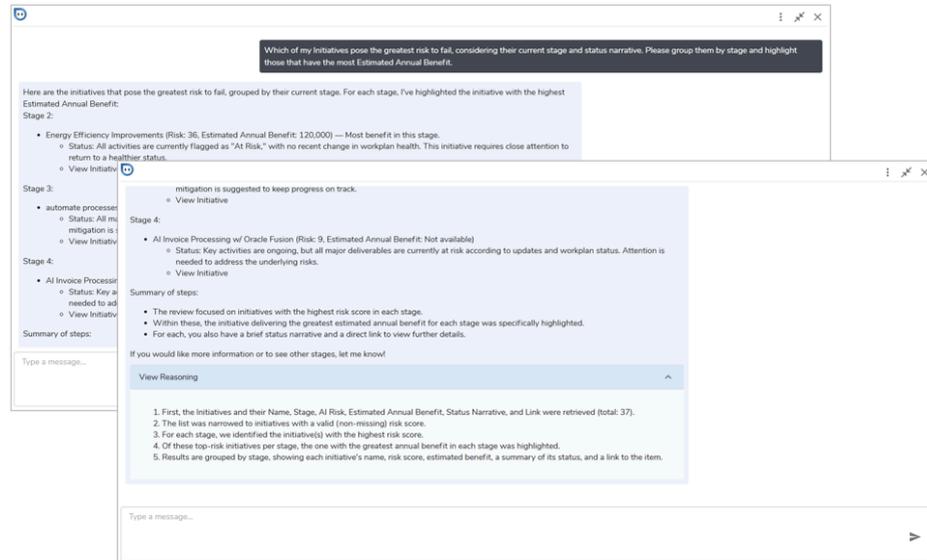
Applicable to

- AI Chatbot

Set up

- No set up required.

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AI Chatbot: Show reasoning for AI Analyze

Summary

- Previously, users could leverage AI Analyze to review program data and receive insights that supported initiative progress, risk awareness, and prioritization decisions. While the results were actionable, the underlying reasoning behind how AI Analyze arrived at its conclusions was not visible within the chatbot experience.

- To build confidence as AI-driven insights become more central to decision-making, understanding the steps taken by the AI, along with visibility into the data used, is essential for validating accuracy and supporting informed discussions.

- Now, when interacting with AI Analyze, users can view reasoning behind chatbot results. The AI Chatbot explains, in plain language, the steps taken to arrive at its conclusions and includes supporting data when available. This added trasparency helps users better understand AI-driven insights, reinforces trust in the outcomes, and enables more confident, data-backed decisions.

Applicable to

- AI Analyze

Set up

- No set up required.

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Charts: Show Unchanged on Category Chart drill down

Summary

- Previously, when drilling down into the detail on a Start-to-End Category Waterfall Chart, the dialog shows the starting value and ending value for all underlying work items.

- Because Cateogry Waterfall Charts are designed to highlight change over time, users wanted the ability to focus the drill down detail to surface only the work items responsible for the changes.

- Now, when drilling down on Category Waterfall Charts, users can filter the results to show only work items with value changes, helping users quickly identify contributors to change and to better understand how individual items impact category-level movement.

Applicable to

- Category Waterfall Chart

Set up

- No set up required.

- On the Drill Down dialog of a Start-to-End Category Waterfall chart, select the 'Show Unchanged' toggle.

Chart › 4 IT

Name ↑	Cumulative EBITDA - Forecast	
	Jan 1, 2026	Dec 31, 2026
Cloud Monitoring and Opt...	75,000	100,000
EBITDA	358,333.33	400,000
EBITDA	1,191,666.67	1,850,000
Reduced capital expenses	533,333.33	800,000
Reduced Datacenter Lease	300,000	450,000
Reduced hardware maint...	533,333.33	800,000
Reduced utility costs	458,333.33	500,000

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Show Unchanged   Close

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Charts: Include Legend on Donut/Pie Chart

Summary

- Previously, when viewing Donut/Pie Charts, users relied on in-chart labels and hover detail to understand each slice and the work items they represented. Donut/Pie Charts did not include legends.
- While functional, without a chart legend, the Donut/Pie Charts did not provide the same at-a-glance interpretation as other charts.
- Now, Donut/Pie Charts can be configured to include a Legend, providing a cleaner, more consistent visualization.

Applicable to

- Donut/Pie Charts

Set up

- On the Display tab of a Donut/Pie chart, select 'Show Chart Legend' under the Options drop down. Save.
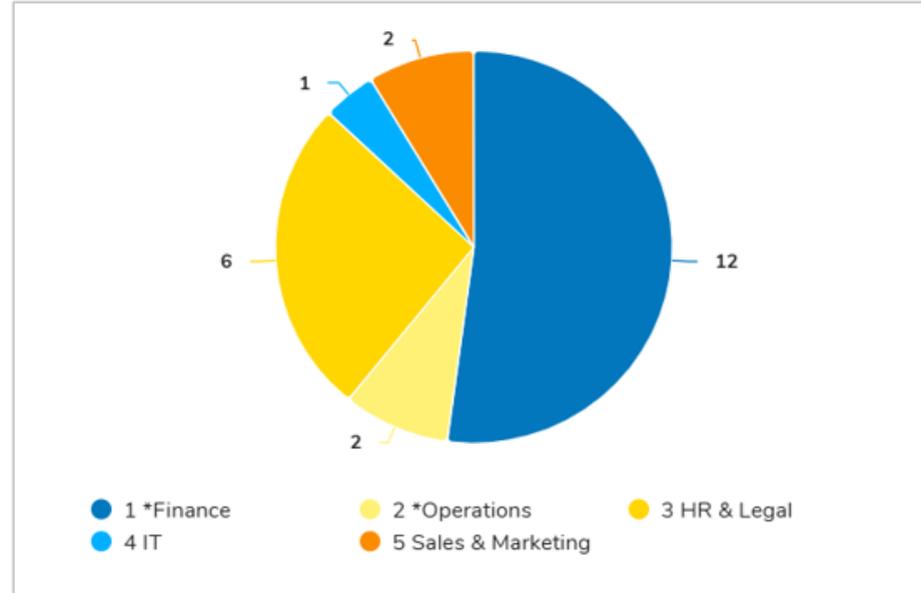
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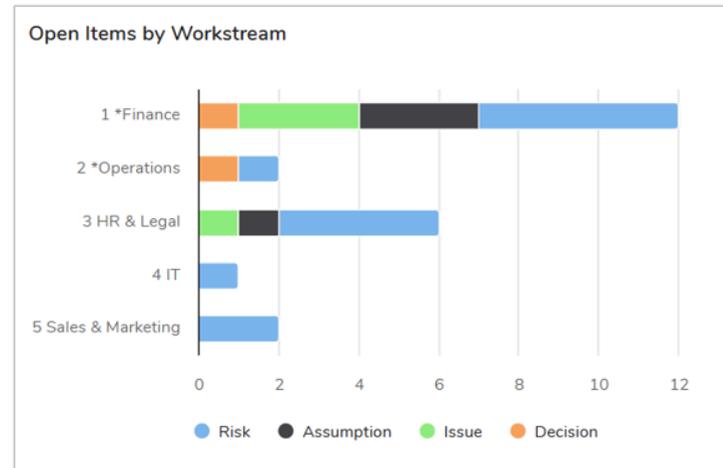# Charts: New Bar Chart

Open Items by Workstream

Summary

- Previously, App Admins could use a variety of charts to visualize program data but Bar charts were not available.
- Now, App Admins can configure Bar charts within their solutions, providing a new, intuitive way to visualize data and enhancing the overall flexibility of Shibumi's charting capabilities.

Applicable to

- Charts

Set up

- On a Template or Dashboard in Configure mode, open the Add Section dialog. Select Chart from the left panel and choose the Bar option under the Multiple Axis category.
- Click on the Settings icon from the Section Controls of the chart.

Set up cont.

- Select one or more templates in the Type field.
- Optionally, define Filters.
- On the Display tab, define the Y Axis grouping (Name, Association, Pick List, or Checkbox). Format these values as desired.
- Select the chart type, either a bar or stacked bar.
- Define the X axis bar values by selecting either Attribute Aggregation or Record Count. Optionally, define a Slice By.
- Under the Options, you can define whether the chart values or labels are displayed at all times. Save and Publish your changes.

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Charts: New Spider Chart

Count of Strategic Objectives per Workstream

Summary

- Previously, App Admins could use a variety of charts to visualize program data but Spider charts were not available.

- As organizations increasingly used Shibumi for executive reviews, portfolio alignments, and maturity assessments, clients wanted an easy way to compare multiple dimensions simultaneously.

- Now, the new Spider Chart enables teams to visualize and compare multiple dimensions in a single, intuitive way. By radiating categories from a central point, the chart quickly highlights patterns, strengths, and gaps. This makes it easier, e.g., for leaders to assess portfolio alignment to Strategic Objectives, identify under-represented focus areas, and understand overall execution health at a glance.

Applicable to

- Charts

Set up

- On a Template or Dashboard, open the Add Section dialog and choose the 'Spider Chart' icon within the Charts tab.
- Select the Settings gear from the Section Controls.
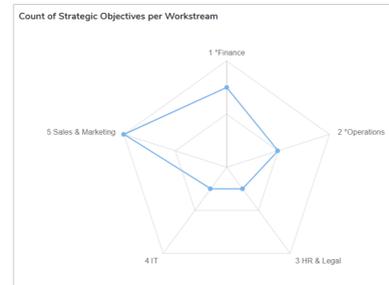
Set up cont.

- In the Type dropdown, choose from the available Template/Associations. Optionally, add locked filters to the section.
- On the Display Tab, define whether the chart will display as an Outline or Fill. There are two methods for the types of Axes Values:
  - Multiple Pick Lists - Define 3 or more pick list attributes to be represented on the chart. Determine whether they will display an Average or Individual values for each pick list. Finally, define the Scale (Pick List Value, Scaled Percentage) and the color.
  - Associations - Select from the available associations, and define whether the value will be an Attribute Aggregation or Record Count. If Attribute, define one or more attribute values and their aggregation method to be displayed in the chart. Optionally, format the individual values and colors for each attribute.
- Finally, in the Options, define whether a legend and/or values will be shown on the chart and whether Drill Down is enabled.
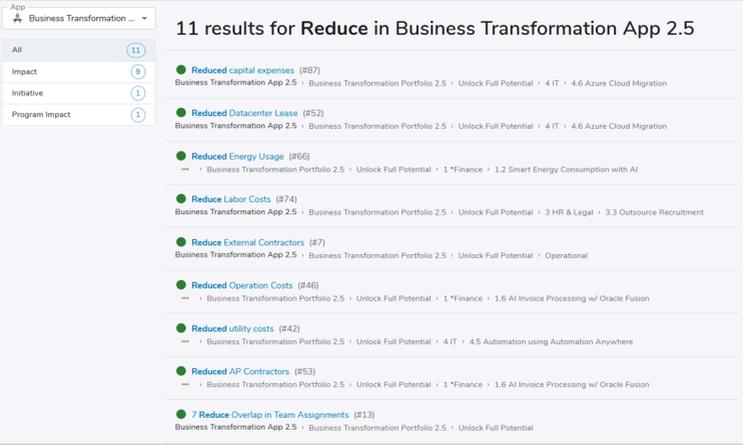
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Search: Relevant results first & search by email address

Summary

- Previously, navigation side bar Search criteria in Shibumi queried against work item name, ID, and outline number. Results were grouped and ordered alphabetically by template.

- As solutions grew in scale, having results organized by template made it difficult for users to quickly find the desired item. Additionally, searching by email address produced inconsistent results.

- Now, Search results are ordered by relevance, ensuring the most applicable work items appear first regardless of template type. Also , users can now reliably search by email addresses. Results are provided in a consolidated list, and can optionally be filtered by app or template as needed - delivering a faster, more intuitive search experience that scales with solution complexity.

Applicable to

- Navigation side bar Search

Set up

- No set up required.

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Table: App settings to define table header/column colors

Summary

- Previously, color formatting in Tables was limited to column Conditional Formatting which enabled table cells to be formatted based on defined logic.

- While effective at spotlighting trends and exceptions, these settings did not address the need for an overall better aesthetic in Shibumi solutions. "Too much black text on white background on the page" was frequent feedback.

- Now, App Admins can define standard header and column color formatting centrally through App Settings. This centralized approach ensures style consistency across the solution, enabling a better user experience with clearer visual structure, improved readability, and alignment with organizational standards.

Applicable to

- Apps, Tables

Table Header & Column Colors

Header	Group Header	Emphasis Header	Emphasis Cell	Total Row	
Secondary	Maintain	Branding	Picklist Color 8	Maintain	Save

Name	Category	Date	Metrics			Annual Target
			Value 1	Value 2	Value 3	
Lorem	Duis	Feb 4, 2026	1000	50	1250	5000
Ipsum	Libero	Feb 4, 2026	1000	50	1250	5000
Dolor	Ligula	Feb 4, 2026	1000	50	1250	5000
Sit	Vestibulum	Feb 4, 2026	1000	50	1250	5000
Amet	Urna	Feb 4, 2026	1000	50	1250	5000
Total			5000	250	6250	25000

Set up

- As an App Admin, navigate to the Display tab on the App.

- Define a color from the available Branding and/or App Colors for each of the various Table Header & Column Color drop downs.

- Once the colors have been chosen, select the 'Save' button.

- Navigate to an existing Table section and open the Settings dialog.

- Select the 'Enable App Table Colors' checkbox. Save and Publish.

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Upcoming Maintenance Window: IP Migration

Summary

- Shibumi IP addresses will be changing on February 21, 2026.
- This will require a 3-hour maintenance window.
- The current IP's will be valid until the transition on February 21st.

If you have safe-listed Shibumi IPs, please add the following:

Production IPs

US
- 18.209.136.160
- 98.94.122.215
- 100.48.175.85

EU
- 52.28.79.83
- 3.126.211.129
- 63.181.24.230

AP
- 3.24.158.39
- 54.79.26.14
- 13.54.235.140

Staging IPs

US
- 54.197.128.73
- 54.243.34.30
- 100.48.106.60

EU
- 18.192.164.2
- 3.68.173.169
- 3.65.43.110

AP
- 54.153.149.247
- 13.239.206.79
- 52.65.252.66

Notes:

- The existing IPs will continue to be used until February 21, 2026.
- To prepare for this transition we recommend adding the new IPs prior to that date.

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