

246.1-3 & 247.0 Release Notes

30 May 2026

Contents

Issue Resolutions

- Internal error moving an item under one of its ancestors
- Page level filter breaks page when returning a large number of work items
- Only Operations Admins have access to Restore Deleted Items page in app

Contents

Enhancements

- App Administration: Bulk Edit attribute descriptions
- App Administration: Placeholders (Open Resources Replacement)
- AI Agent: Display AI Admin Tab before Chatbot is enabled
- AI Agent: Update Values via the chat window
- Solution Logic: On Create Business Rule to set association to myself
- Table: Ancestor & Association column on Standard Table / Tree View
- User Management: SSO SCIM Capabilities
- UX: Template Icon for Create Menu options
- UX: Additional Icons available for Tabs and Templates

Issue Resolutions

- Field labels overflow bounds in narrow containers
- Template Editing - Align Section Move dropdown with Editing Layout dropdown order
- Export / Import Section: Roles not exported in correct format for import
- Metric Text attribute Expression bug
- Injected page filter reference lists options out of order
- Edit form section name limits text to 200 characters with injected expression

App Administration: Bulk Edit Attribute Descriptions

Summary

- Previously, App Admins could edit the attribute details to add a description. Including a description helps document the solution and provides context for AI Agents.
- Especially for solutions with a large number of attributes, it was tedious to open each attribute's details to add the description. Admins needed a way to manage these more efficiently.
- Now, App Admins can bulk edit both the Description and Admin Only fields for attributes directly within the Data Panel, making it a significantly faster exercise.

Bulk Edit (46)			
Name	Data Type	Admin Only	Description
Measurable Objective? (Measurable_Objective__c)	Checkbox	<input type="checkbox"/>	
Modifier (modifier)	Reference	<input type="checkbox"/>	The user who last modified the item.
My Role (myRole)	Pick List - Multi	<input type="checkbox"/>	Displays the role(s) of the current user on the item.
Name (name)	Text - Multi Line	<input type="checkbox"/>	Name of the item.
Objective alignment (Objective_alignment__q)	Association Picklist	<input type="checkbox"/>	
Objective Alignment ID (Objective_Alignment_ID__c)	Text - Single Line	<input type="checkbox"/>	
Objective Alignment Unique ID (Objective_Alignment_Uniqu...	Text - Single Line	<input type="checkbox"/>	
Objective Type (Objective_Type__c)	Pick List - Icon	<input type="checkbox"/>	
Overdue (overdue)	Text - Single Line	<input checked="" type="checkbox"/>	A true/false value indicating if an active item is past its Due Date. Inactive, On Hold, or Completed items are not considered overdu...
Parent (parent)	Reference	<input type="checkbox"/>	Parent instance of the current item.
Parent of Parent Item (grandparent)	Reference	<input type="checkbox"/>	Grandparent instance of the current item.
Plural Type (Plural_Type__c)	Text - Single Line	<input type="checkbox"/>	
Primary Measure (Primary_Measure__q)	Association Picklist	<input type="checkbox"/>	
Primary Measure Name (Primary_Measure_Name__c)	Text - Single Line	<input type="checkbox"/>	A primary measure name is simply the label of the main metric you use to track progress against a strategic objective. Think of it ...

Applicable to

- Data Panel

Set up

- On a Template, open the Data Panel.
- Select the 'More Actions' icon in the top right of the data panel, choose the 'Bulk Edit' option.
- From the Bulk Edit dialog, modify the Description/Admin Only flag for the desired attributes.
- Select Update and then Publish.

App Administration: Placeholders

Summary

- Previously, Open Resources served as placeholder roles on work items. They could be created in an ad hoc manner through participant selection, bulk edit, or import, which could lead to duplicates, unused entries, and inconsistency across solutions. This approach could also create the false assumption that a user had access to a work item when they did not.
- As solutions scaled and governance requirements grew, organizations needed a more controlled and centralized approach to managing placeholder participants.
- Now, App-level Placeholders replace Open Resources, giving both App Admins and Operations Admins a centralized interface to create and maintain the full roster of available Placeholders. Users continue assigning Placeholders to roles as needed, while administrators own placeholder creation and maintenance.
- Note: Existing Open Resources will be migrated automatically with no action required to retain current assignments.

Applicable to

- Apps, Placeholders (Replacement for Open Resources)

The screenshot displays a user interface for managing placeholders. At the top right, there is a button labeled '+ Create Placeholder'. Below this, a table header shows 'Name ↑' and a row contains '[Program Owner]' with edit and delete icons. A modal window titled 'Create Placeholder' is open in the foreground, featuring a text input field labeled 'Name *' and two buttons at the bottom: 'Cancel' and 'Create'.

Set up

- As an App/Operations Admin, navigate to the 'Placeholders' Tab on the App Details page. A list of current Placeholders will be visible.
- Select the '+ Create Placeholder' button, define a name for the new Placeholder and click 'Create'.
- Now on a Participant Panel, the newly created Placeholder will be searchable and selectable as an available user on a work item.

AI Agent: Update Values

Summary

- Previously, when AI Analyze recommended changes to work item attribute values, users needed to navigate to each individual record and apply updates manually.
- As the use of AI Analyze expanded to identify trends and recommend changes across a program, the gap between receiving a recommendation and acting on it became an opportunity to streamline the experience.
- Now, users can review, modify, and accept AI-recommended attribute value changes directly within the chat window, without leaving the conversation. Governance and data integrity remain fully intact, with the Agent only offering attributes it has been granted visibility to and with all existing editability rules enforced.

Applicable to

- Shibumi AI

Prerequisites

- Shibumi Chatbot Enabled, Attributes enabled for Shibumi AI.

For Shibumi Customer and Partner Use Only.

Could you recommend a Status for the Product Line Diversification initiative based on the proximity to the Due Date, the current Stage, the Complexity Rating and the Value Score?

Recommended Status Indicator for "Product Line Diversification": Warning
Basis (using today: May 27, 2026):

- **Due Date proximity:** Due Jul 21, 2026 (-55 days away). That's close enough that any slippage starts to matter, but it's not yet "imminent/overdue," so this points to **Warning** rather than automatically **At Risk**.
- **Current Stage:** Stage 2 (still relatively early/mid lifecycle). In this stage, issues are often still recoverable with corrective actions → leans **Warning** unless other factors are severe.
- **Complexity Rating (AI Complexity):** 2 (low). Lower execution complexity reduces the likelihood that the team can't recover schedule → supports **Warning**.
- **Value Score (AI Value):** 50,000. Meaningful, but not so large (in isolation) that we should force **At Risk** solely based on value; instead it raises the need for attention and active management → supports **Warning**.

If you want, I can also propose an updated **Status Narrative** aligned to this recommendation and (optionally) prepare the update form to change the initiative's current **At Risk** to **Warning**.

You please that would be great.

Update Initiative: 5.1 Product Line Diversification

Status Indicator: Warning

Status Narrative: Due Jul 21, 2026 (-8 weeks), Stage 2 with low complexity (2) and meaningful value (\$50K). No immediate overdue signal, but timeline is tight enough to require active mitigation and weekly tracking to stay on plan.

Apply Changes Report

Type a message...

Set up

- Prompt Shibumi AI for a recommendation on a Work Item.
- E.g., "Recommend a Status for my Initiative based on the proximity to the Due Date, the current Stage, the Complexity Rating and the Value Score."
- Shibumi AI will provide reasoning for its recommendation and ask whether you would like to apply these changes. Accepting the recommendation will result in an edit form on the chat window.
- Select 'Apply Changes' or 'Reject' on the Edit form.

On Create Business Rule to set Association to myself

Summary

- Previously, when configuring a Create Work Item Business Rule, App Admins could define attribute values to be set on the newly created item.
- Setting an association to the originating work item required a secondary Business Rule to run on create of the new item solely to establish that relationship.
- Now, when configuring a Create Work Item Business Rule, App Admins can specify that an association on the newly created item should be populated with the originating work item, establishing a relationship in a single rule at the point of creation.

Applicable to

- Business Rules, Associations

Set up

- Navigate to a Template and open the Business Rules tab within the Data Panel. Create a new Business Rule, apply a Name, Run Trigger, and a Condition as desired. Select the 'Add Action' + button.

Add Action: Create Work Item

Where *
Program

What *
Strategic Objective

Assign New Item to Association (Optional)
Strategic Objective (Strategic_Objective__q)

Set Values

+ Add

Cancel Save

Set up cont.

- Choose the 'Create Work Item' action from the list.
- Define 'Where' the new work item will be created, then select an available template for 'What' type of work item will be created.
- Within the 'Assign New Item to Association (Optional)' field, choose from the available associations, this will only be available if there is an existing association from the current template to the template type being created. Save and Publish your changes.

Ancestor & Association Columns on Table/Tree View

Summary

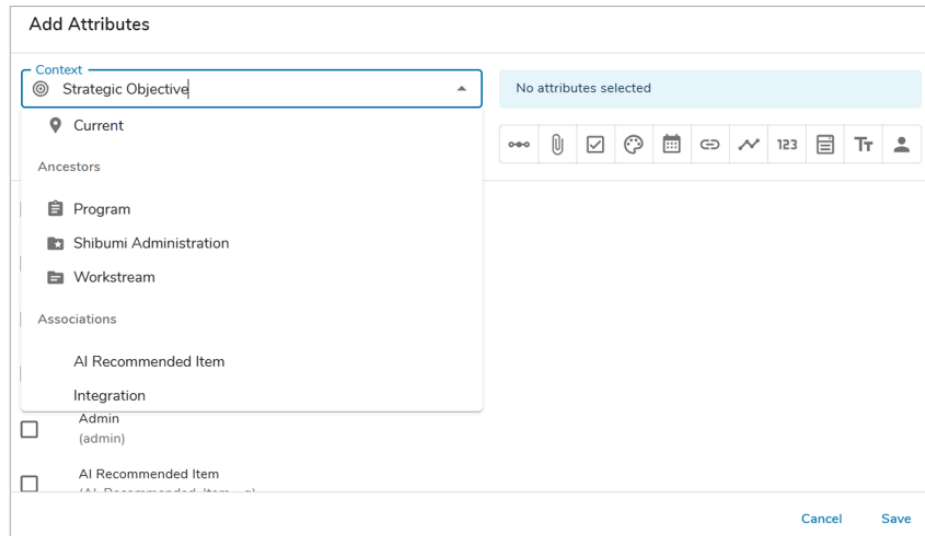
- Previously, displaying an ancestor or associated work item's name or attributes within a Table or Tree View section required App Admins to create calculated attributes specifically for that purpose.
- In solutions where multiple work items were displayed within a single section, this added unnecessary complexity to the solution configuration.
- Now, Tables and Tree Views allow the display of attributes from a parent, ancestor, or associated work item directly within the section.
- *Note: Users will only see data they have permissions to access, with the exception of Name which is always displayed.*

Applicable to

- Standard Table, Tree View

Set up

- In Configure Mode, select the Customize option on a Table/Tree.
- Select the '+ Add Column' button and choose the 'Attribute' option.
- From the Add Attributes dialog, open the 'Context' drop down.



Set up cont.

- Choose a Template type from the available contexts: Current, Ancestors, or Associations. With a context selected, leverage the available filters and search bar to find the desired attributes.
- With the desired attributes selected, click the 'Save' button. Save the Table/Tree view.

User Management: SSO SCIM Capabilities

Summary

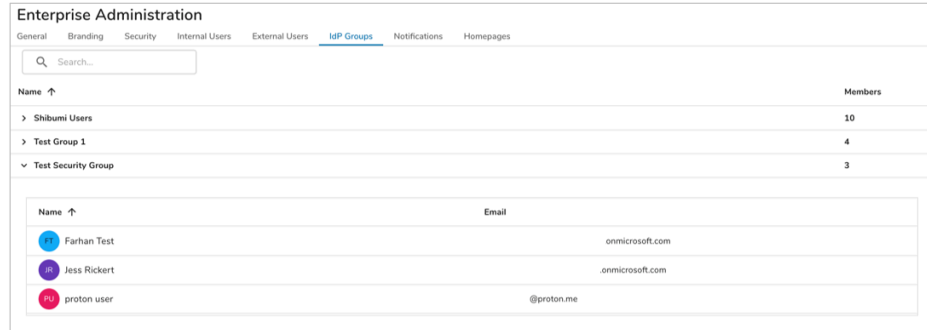
- Previously, organizations using Single Sign-On managed Shibumi access rights for user accounts within the platform directly.
- For enterprises with a large number of users, this created an ongoing administrative overhead to keep accounts in sync with their Identity Provider.
- Now, Release 247.0 introduces a simplified SSO configuration experience alongside initial SCIM support, enabling the automatic provisioning and deprovisioning of Shibumi accounts. For customers managing large user populations, this removes the need to maintain user accounts within Shibumi directly.

Applicable to

- SSO

Set up

- For assistance with current SSO settings or setting up the new SCIM service, please contact your Shibumi Account Representative.



The screenshot shows the 'Enterprise Administration' interface with the 'IdP Groups' tab selected. It displays a list of groups and a detailed view of a group's members.

Enterprise Administration	
Search...	
Name ↑	Members
> Shibumi Users	10
> Test Group 1	4
▼ Test Security Group	3

Name ↑	Email
Farhan Test	onmicrosoft.com
Jess Rickert	.onmicrosoft.com
proton user	@proton.me

User Management

- As an Enterprise Admin, you will have the ability to monitor user access from your SSO IdP within Shibumi. Navigate to the Enterprise Admin IdP Groups tab to view the users within your solution that are part of your SSO IdP Groups.
- Users are only deprovisioned if your enterprise is SSO Required. If a user is removed from all enabled IdP Groups, their account is locked in Shibumi.