249.0 Release Notes

25 July 2026

Contents

AI Update Value: Include Associated Items

Summary

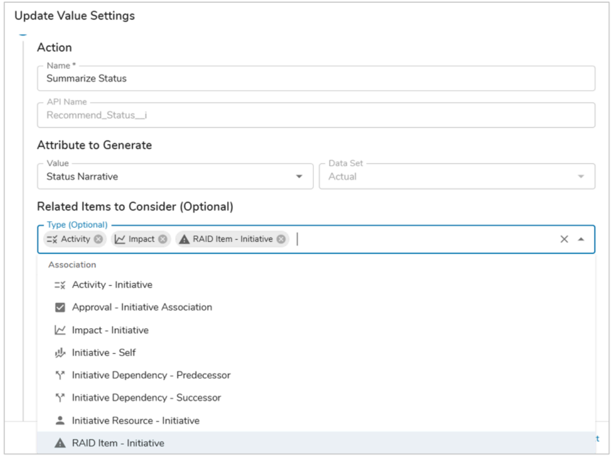
- Previously, AI Update Value drew on direct descendants as context when generating recommendations, providing a focused but limited view of the data available for AI-generated content.
- For summarization exercises, where the most meaningful insights often span across related work items rather than just children of a single record, this scope could limit the quality and relevance of the AI response.
- Now, App Admins can include associated items when configuring AI Update Value, opening up cross-item analysis that meaningfully increases the depth and accuracy of AI-generated content.

Applicable to

- AI Update Value, Associations

Set up

- As an App Admin, navigate to a Template and toggle on the Data Panel. From the Data Panel select the 'AI Actions' tab.



Set up cont.

- Create a new Update Value AI Action or select the edit icon on an existing Update Value AI Action.
- On the Type (Optional) drop down, choose from the available Associations.
- Select the Attributes you would like to pull from the Associated Template, modifying the prompt as needed.
- Save and Publish your changes.

Charts: Total Column on Stacked Metric Timeframe

Summary

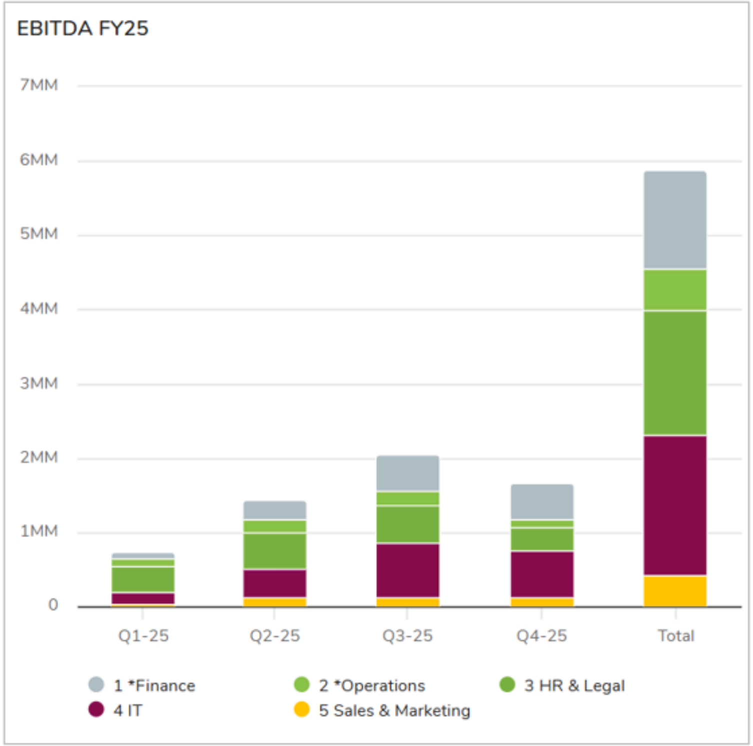
- Previously, Stacked Metric Timeframe Charts displayed values for each period within a time range.
- Users often requested the ability to show an aggregation of values across the full timeframe.
- Now, an optional Total column can be added to Stacked Metric Timeframe Charts, giving users immediate visibility into the combined value across all columns/slices for each time period displayed.

Applicable to

- Metric Timeframe Charts

Set up

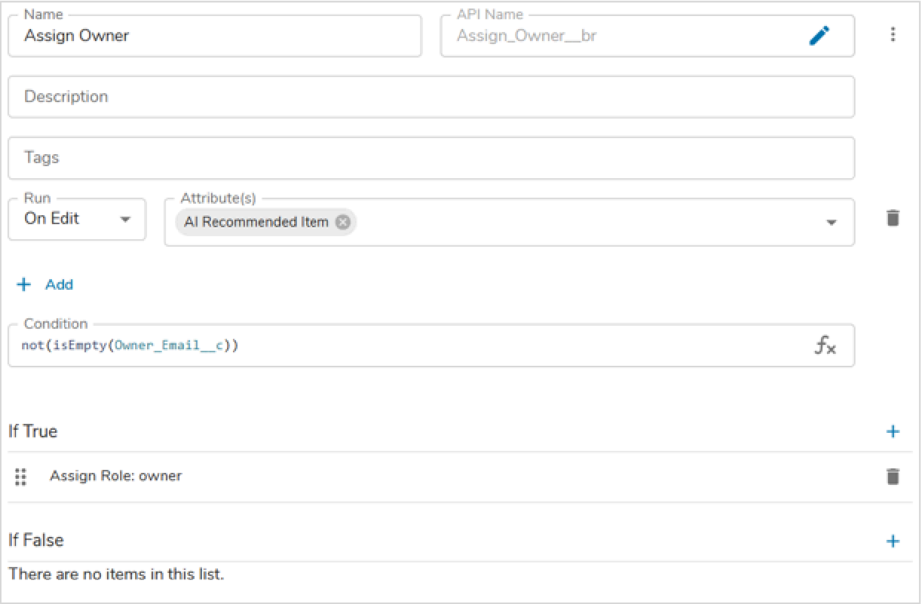
- On a Dashboard/Template in Configure mode, select the Settings icon from a Stacked Metric Timeframe Chart's floating section controls.
- On the Display Tab of the Chart Settings dialog, open the Options accordion and toggle the 'Show total column' checkbox.
- Optionally, define an alternative label for the Total column.
- Save and Publish your changes.



Expressions: not() Function

Summary

- Previously, evaluating whether an attribute held a value required App Admins to use the 'isEmpty() = false' expression.
- While functional, this pattern added unnecessary complexity to what is a common and straighforward logical check.
- Now, the new not() function provides a cleaner and more intuititve way to express the same logic.



Applicable to

- Expressions

Syntax

- not(value)
- Value - A constant (i.e., hard-coded value or attribute reference).
- E.g., not(isEmpty(Due_Date__c))

Reporting: Print to PDF (Beta)

Beta Notice

Print to PDF is a Beta feature due to an known issue in Google Chrome. Users leveraging Chrome may experience truncated output due to a issue currently being tracked by the Google development team.

Summary

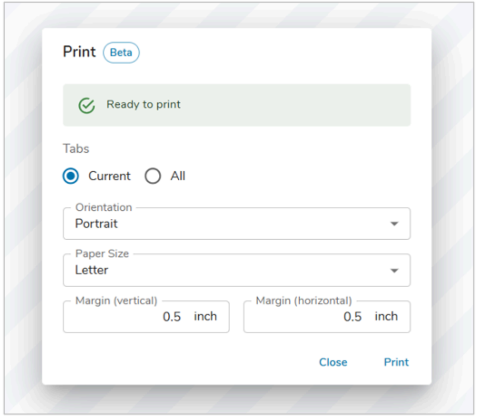
- Previously, sharing Shibumi content with stakeholders outside the platform required manual screenshots or alternative workarounds to capture and distribute program information in a presentable format.
- For teams preparing for executive reviews, sending progress updates to stakeholders who are not in the system, or simply capturing point-in-time snapshot of a program, the absence of a native export option created a gap between the platform and the people who needed the information.
- Now, users can export the content of any Dashboard or work item instance as a PDF, with each Tab rendered as a separate page within a single document.

Applicable to

- Dashboards, Work Items

Set up

- On a Dashboard or Work Item, click the 'More Actions' button. Select the 'Print (Beta)' option from the drop down.
- Define the Tabs, Orientation, Paper Size and Margins, select 'Print'.



Notes

- If you select 'All' for Tabs, each of the Tabs will be formatted as a separate page on the PDF.
- We recommend not trying to Print to PDF any Tabs which have Table sections leveraging horizontal scrolling.

shibumi

Assign Group Membership Using an IdP/SSO Group

Summary

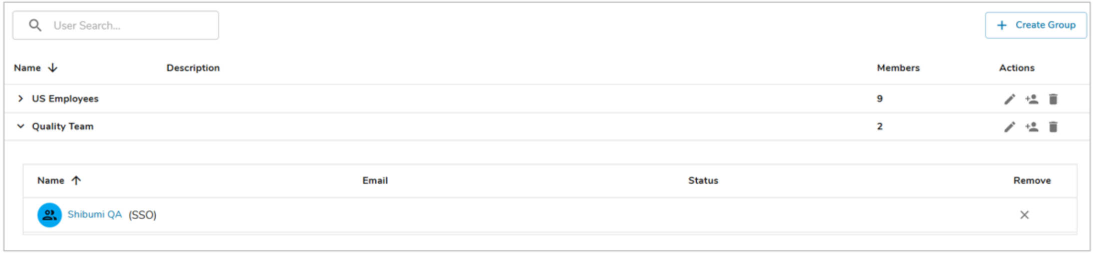
- Previously, maintaining membership in a custom App User Group required adding and removing users individually.
- Organizations managing large user populations through SSO would like the ability to assign membership to custom App User Groups through their already well-defined IdP/SSO Groups.
- Now, App and Operations Admins can assign membership to a custom App User Group by assigning an IdP/SSO Group.

Applicable to

- User Groups

Prerequisite

- Your solution must be configured for SSO authentication with SCIM enabled. For more information or assistance setting up this configuration, please contact your Shibumi Account Team.



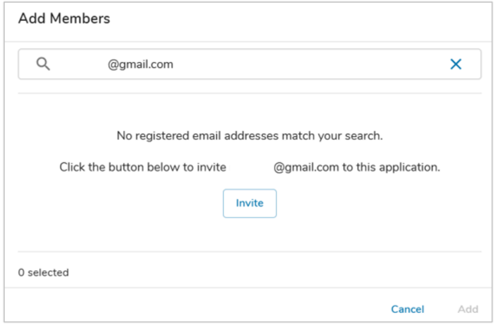
Set up

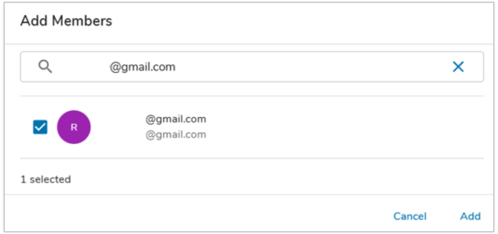
- As an App or Operations Admin, navigate to the 'Groups' tab of an App. Open the Add Members dialog by either creating a new User Group or by editing an existing one.
- Enter criteria in the search field of the Add Members dialog to locate the desired IdP/SSO Group name, or search for it manually within the list.
- Click the checkbox for the IdP/SSO Group name and select 'Add'.
- The IdP/SSO Group will be added to the User Group and is identifiable by the (SSO) tag appended to the name.
- Select the IdP/SSO Group name to view the members currently assigned to that group.

User Groups: Invite New Users from the User Groups Tab

Summary

- Previously, inviting new users to Shibumi and assigning them to a User Group were separate actions, requiring admins to complete the onboarding process through one workflow before returning to manage group membership.
- Admins standing up a new solution or onboarding a large cohort of users found this to be a time-consuming process.
- Now, App and Operations Admins can invite new users to Shibumi directly from the Groups tab.





Applicable to

- User Groups, Shibumi Account Creation

Set up

- As an App or Operations Admin, select the Apps button and the desired app name, then navigate to the Groups tab.
- On an existing User Group, select the 'Add Members' icon from the Actions column.

Set up cont.

- In the Search field on the Add Members dialog, type in the email address of the user you would like invite to Shibumi and add to the group. Click the Enter/Return.
- You will be met with a text dialog stating there are no registered email addresses matching your search and asking whether you would like send an invite to the email address. Click 'Invite'.
- The Add Members dialog will return with the newly invited email address listed, select the checkbox on the user and click 'Add'.

Sunset Notice: Pagination of Sections

<u>**Summary**</u>

- With Release 249.0, pagination will be retired across Tables, Chart Drilldown, and Card Drilldown.
- This change creates a more consistent and predictable experience across these areas of the platform, formalizing how records are surfaces and viewed within sections.
- <u>No action is required ahead of this change.</u>
- Any sections previously showing pagination will now allow users to scroll to see all content.

<u>**Applicable to**</u>

- Tables, Chart Drilldown, Card Drilldown