244.0 Release Notes

07 March 2026

Enhancements

- App Administration: Attribute Usage, Restore Deleted Items, Rules Log
- App History: Correlate Template Publishes
- Cards: Provide hover to see full text if text is truncated
- Charts: Add group by/slice by to non-stacked Metric Timeframe Chart
- Import: Excel File with Multiple Template Types
- Search: Add search bar to results page
- Search: Expand to text attributes
- Solution Logic: Provide an offset to any time series in the expression language
- Sunset Notice: Open Resources
- Tables: Bulk Delete
- Tables: Reference column
- Tables: Row Height for Metric Table
- Tree View: Conditional Formatting for aggregated attributes
- User Management: Send registration email to pending users that request password reset
- UX: Ability to display an Icon on a Tab/Template
- UX: Expand Section to Full Screen

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Issue Resolutions

- Assign Role business rules not auditing role assignment as from Rule
- Create work item business rules not auditing create as from Rule
- History view missing values in context/name column values
- Recent users aren't receiving mobile phone push notifications

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App Administration: New Admin Functionality

Summary

- With Release 244.0, we are introducing expanded governance and tracking capabilities that empower App Admins to more effectively manage and maintain their solutions - capabilities that were previously only available to Shibumi employees.

- App Admins now have access to three new administrative functions: Attribute Usage, Restore Deleted Items, and Rules Log. Together, these tools provide greater transparency into solution configuration and activity.

- We are excited to extend these support functions directly to App Admins and look forward to continued feedback as we evaluate additional capabilities that further strengthen administrative control and solution governance.
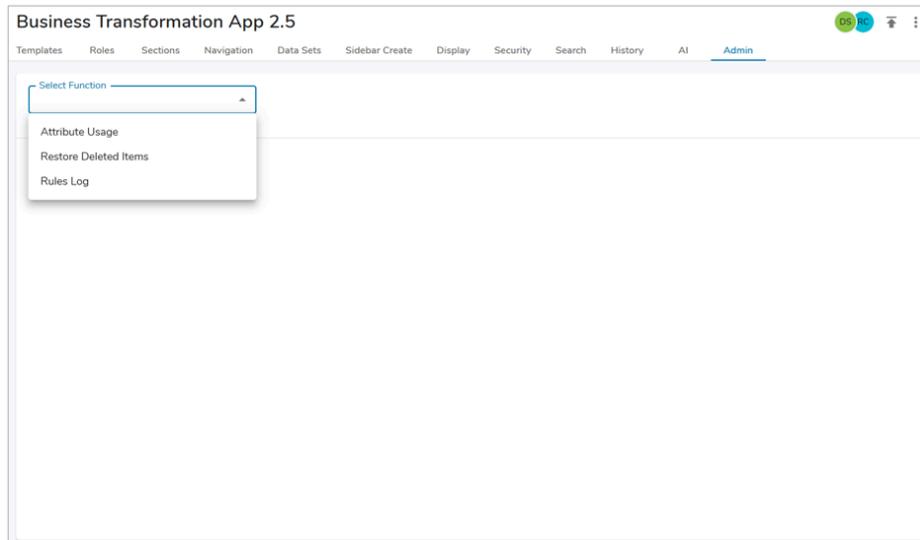
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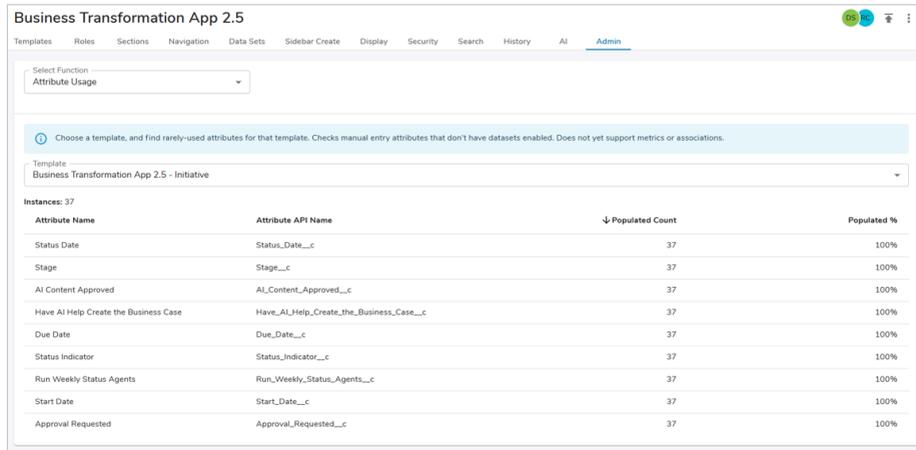# App Administration: Attribute Usage

Summary

- Previously, the Attribute Usage functionality was available only to Shibumi employees, limiting visibility into attribute utilization.

- As solutions scaled and evolved, App Admins needed greater transparency into how attribues were being used to effectively manage configuration complexity. Without direct access to usage insights, identifying unused or redundant attributes required additional support and made proactive governance more difficult.

- Now, App Admins can access the Attribute Usage page to view where attributes are being used, and more importantly, where they are not, across the solution. This strengthens administrative governance by providing clear visibility into attribute health, helping reduce unnecessary configuration and prevent technical debt.

Applicable to

- Apps, App Admin, Attributes

Set up

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

Set up cont.

- Navigate to the Admin tab, from the 'Select Function' drop down choose the 'Attribute Usage' option.

- Select a template from the respective drop down, once a template is chosen the attributes configured and number of instances of the template will be displayed.

- The rows will provide the Attribute Name, Attribute API Name, Populated Count, and Populated %.

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# App Administration: Restore Deleted Items

Summary

- Previously, restoring deleted records required involvement from the Shibumi support team, limiting direct administrative control within the solution.
- As solutions matured and user counts expanded, App Admins needed the ability to quickly address accidental deletions or recover records without relying on external support.
- Now, App Admins can access the Restore Deleted Items page to recover previously deleted records when needed. This enhancement expands the administrative toolkit, providing greater control, faster resolution of accidental deletions, and improved autonomy in managing overall solution health.

Applicable to

- Apps, App Admin, Work Items

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 for the App.
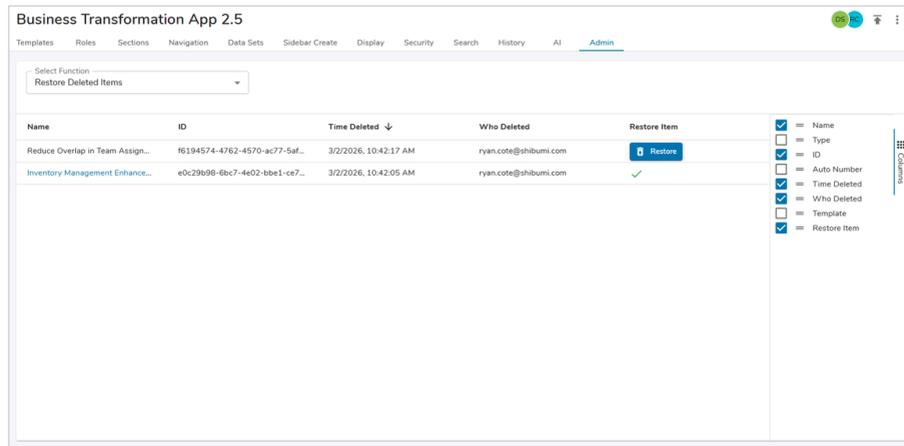
Set up cont.

- From the 'Select Function' drop down, choose the 'Restore Deleted Items' option.
- To restore a work item, select the blue 'Restore' button.
- Once an item has been restored, the blue 'Restore' button will be replaced with a green check mark and the work item's name will now be hyperlinked.

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App Administration: Rules Log

Summary

- Previously, the Rules log functionality was available only to Shibumi employees, limiting visibility into Business Rule executions.

- As solutions increasingly relied on Business Rules for automation, App Admins needed direct access to rule execution log. Without this, troubleshooting errors or unexpected behavior required Shibumi support.

- Now, App Admins can leverage the Rules Log to review and audit Business Rule activity directly, providing critical insight into when rules are initiated, how they run, and where issues may occur - strengthening governance, improving troubleshooting efficiency, and expanding overall administrative monitoring capabilities.

Applicable to

- Apps, App Admin, Business Rules

Set up

- As an App Admin, select the 'Apps' icon from the sidebar.

- Choose the desired App Name from the list.

Set up cont.

- Navigate to the Admin tab of the App.

- From the 'Select Function' drop down, choose the 'Rules Log' option.

- Define a Start Date and End Date, by default this will be today.

- Additional Columns can be added to the Rules Log via the 'Columns' toggle on the right side of the screen.

- Selecting a hyperlink will take you to the respective page (work item, Business Rule. etc.).

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Group by/slice by on non-stacked Metric Timeframe

Summary

- Previously, Metric Timeframe Charts supported Group By and Slice By functionality only when configured as a stacked chart.

- While stacked and non-stacked charts appear visually similar, stacked Metric Timeframe Charts require adding multiple Metrics as stacks - meaning there was no way to group or slice a single Metric by a separate category.

- Now, non-stacked Metric Timeframe Charts support Group By and Slice By options, aligning their functionality with other chart types. This enables dynamic categorical analysis of a single Metric - such as displaying EBITDA by Quarter while slicing each column by Workstream - without requiring a stacked configuration.

Applicable to

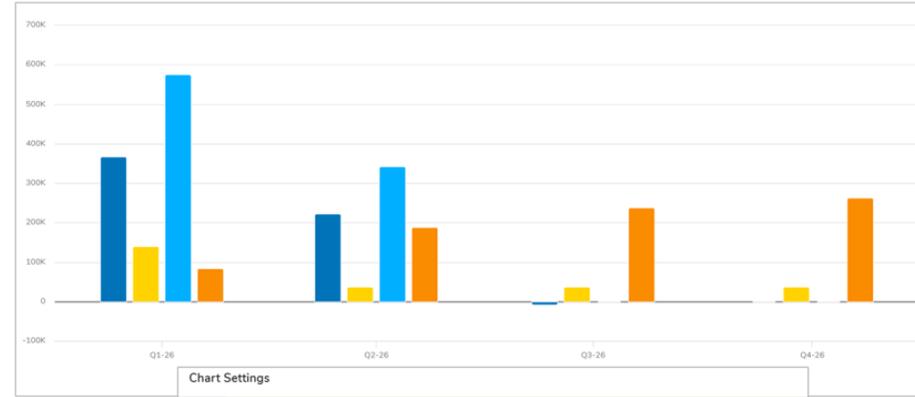- Non-stacked Metric Timeframe Chart

Set up

- On a non-stacked Metric Timeframe Chart, select the Settings gear from the section controls to open the Chart Settings dialog.

- Define a Slice By (Name, Association, Pick List, Checkbox). Save.

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Import: Excel File with Multiple Template Types

Summary

- Previously, importing work items required users to upload a separate Excel file for each Template type.

- When onboarding structed data across multiple templates, this resulted in multiple uploads and repetitive configuration steps.

- Now, users can upload a single Excel file containing multiple tabs (sheets), each corresponding to a different Template type. This allows new work items across multiple templates to be created in one streamlined import process, reducing administrative effort and improving efficiency when onboarding structured data into Shibumi.

Applicable to

- Import

Set up

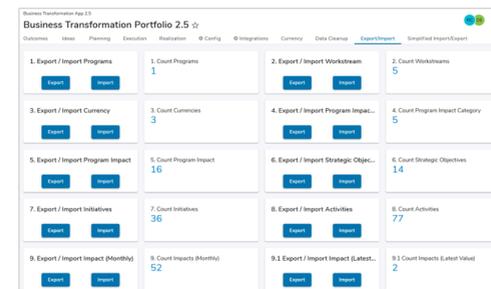- Configure an Export/Import section with a base template type, ensuring that it has Import enabled. No further section configuration is needed. Within the spreadsheet, the left to right order of tabs should match the solution hierarchy.
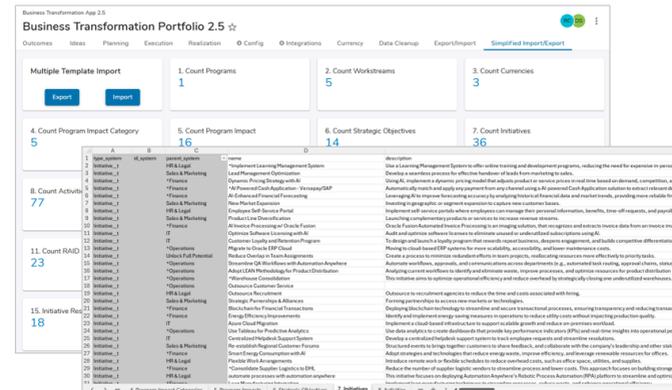
- Save and Publish your changes.

Separate Excel File required for each template type.

Versus...

Single Excel File with multiple 'tabs' for each template type.

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# Sidebar Search: Expanded to include text attributes

Summary

- Previously, sidebar search in Shibumi returned work item results based on matches to Name, ID, or Outline Number. Other attributes were not considered, limiting the scope of search results.
- Users often needed to locate work items based on additional attributes - such as Description, Status Narrative, or Business Case Summary - to quickly find relevant information.
- Now, App Admins can configure additional custom text attributes to be included in search queries. By default, the out-of-the-box Status Message and Description attributes are now included, enabling users to search across a broader set of data and quickly surface the most relevant work items.

Applicable to

- Search, Text Attributes

Set up

- As an App Admin, select the 'Apps' icon from the sidebar.
- Choose the desired App Name from the list.
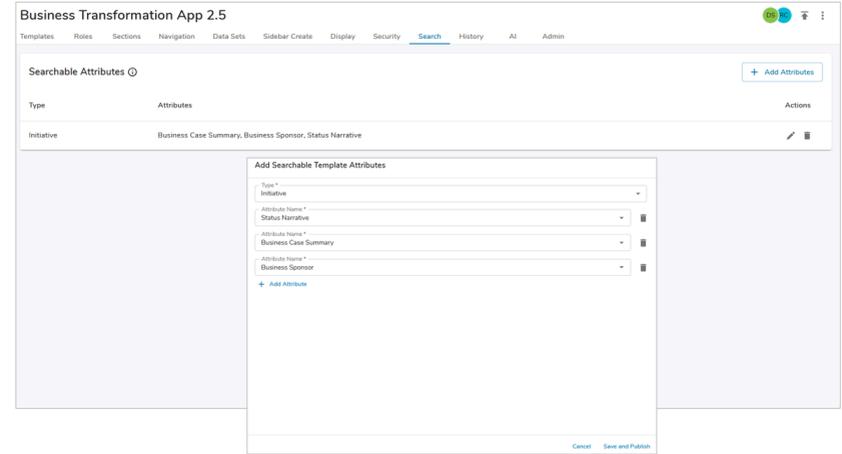
Set up cont.

- Navigate to the Search tab and select the '+ Add Attributes' button.
- In the Type drop down, choose from the available Templates. Next, select a text attribute to be searchable (admin-only attributes are not available for selection). Add additional attributes as needed. Repeat for other templates in the solution.
- Once you have the desired attributes defined, click 'Save and Publish'.

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Provide an offset to any time series in expressions

Summary

- Previously, the Shibumi expression language supported time series calculations but could not apply offsets to these time series in an efficient manner. This led to manual configuration or additional workaround logic when trying to adjust dates or when modeling forward-looking scenarios.

- App Admins needed a flexible way to dynamically shift time-based data by a defined offset value so that they can model future states, compare shifted time periods, and support advanced use cases such as forecasting, scenario planning, and timeline simulations - without requiring manual date adjustments.

- Now, the expression language supports applying an offset to any time series, enabling dynamic date calculations within configured logic.

Applicable to

- All places where the Shibumi Expression Language can be used

New Expressions

- offsetDay(days, value); offsetMonth(months, value); offsetQuarter(quarters, value); offsetYear(years, value)

- Syntax: offsetDay(integer, value)

- Integer: The value to add to the date argument.

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Tables: Bulk Delete

Summary

- Previously, users with the appropriate permissions could delete individual work items from Table sections; however, bulk deletion functionality was only available from legacy View sections. As a result, certain high-volume administrative actions were still commonly performed in Views.

- As organizations managed larger data volumes and workflows within tables, users needed an efficient way to remove large numbers of work items without deleting them one at a time. In addition, continuing to introduce feature parity with legacy Views allows clients to transition toward the modern and more performant Table section.

- Bulk Delete is available within Table, Metric Table, and Tree View sections for users who have the necessary delete permissions. This streamlines high-volume administrative actions.

Applicable to

- Table, Metric Table, Tree View

Set up

- On a Table section with Bulk Edit enabled, select the Bulk Edit icon.

- With Bulk Edit open, toggle on 'Delete Mode' via the toggle in the bottom left of the dialog.

- Select one or more work items to be deleted via the checkbox.

- Click the 'Update & Delete' button, you will be prompted for confirmation and then met with a success banner when the work items have been deleted.

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Tables: Reference column

Summary

- Previously, Table columns displayed attributes and metrics for each row in the Table. To understand related items, such as associated records or hierarchical descendants, users often needed to navigate away from the table or configure separate supporting sections.

- PMO Teams requested streamlined visibility into associations or descendant work items, specifically they requested that a column in a Table could show a comma-delimited list of these referenced items.

- Now, Tables can include a column displaying a comma-delimited list of association backrefrences or descendant work items. For example, a table of Strategic Objectives can display a comma-separated list of contributing Initiatives directly within a column.

Applicable to

- Tables, Association Backreferences, Descendants

Set up

- On a Table, in Configure mode, select the 'Customize' option from the section controls. Click on the '+ Add Column' button.

Set up cont.

- From the drop down, choose the 'Reference' column type.

- Define a Source: Direct Child or Association.

- Define the Attribute displayed: Name, ID, Outline Number (if enabled). Select the 'Add' button.

- Select Save on the Table section and Publish (if on a template).

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UX: Ability to display an Icon on a Tab/Template

Summary

- Previously, Templates & Tabs were displayed using text-only labels.
- As solutions grew in complexity, with multiple Template types and layered layouts, users needed stronger visual cues to quickly identify where they were and the purpose of each section.
- Now, App Admins can define icons for each Template type, which display in the header next to the work tiem name for every instance of that Template. Icons can also be applied to Tabs within Template layouts, providing clearer visual orientation, reinforce the purpose of the sections on a page, and improve overall usability and navigation.
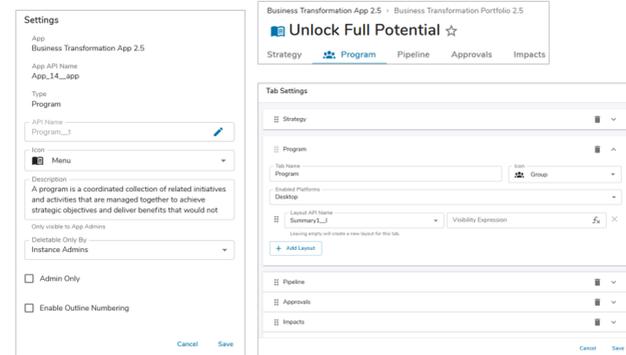
Applicable to

- Templates, Tabs

Set up Template

- As an App Admin, navigate to a Template. From the 'More Actions' drop down, select the 'Settings' option.
- In the Icon drop down, choose from the available icons.
- Select Save and Publish the template. The icon will be displayed on all work items of the template.

Set up Tab

- As an App Admin, on a Template, open the 'More Actions' drop down and choose the 'Configure Tabs' option.
- Open a Tab's drop down, select an Icon from the Icon drop down.
- Save and Publish the template. The icon will be displayed to the left of the Tab's name on all work items of the template.

Notes

- The color for icons will be based on the Branding Enterprise color.
- Dashboards have their own, non-editable, unique icon to visually differentiate them from work items.

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UX: Expand Section to Full Screen

Summary

- Previously, sections within a layout were constrained to their configured size, requiring users to scroll or navigate between views when working with large data sets or dense visualizations.

- As dashboards and template became more data-rich, users needed the ability to temporarily focus on a single section to better analyze detailed information.

- Now, users can expand sections to Full Screen, allowing a single section to occupy the entire workspace for focused analysis. This capability is available for Table, Metric Table, Tree View, all Chart sections, and the Board section - making it easier to review dense data sets, analyze metrics, and manage boards without layout constraints.
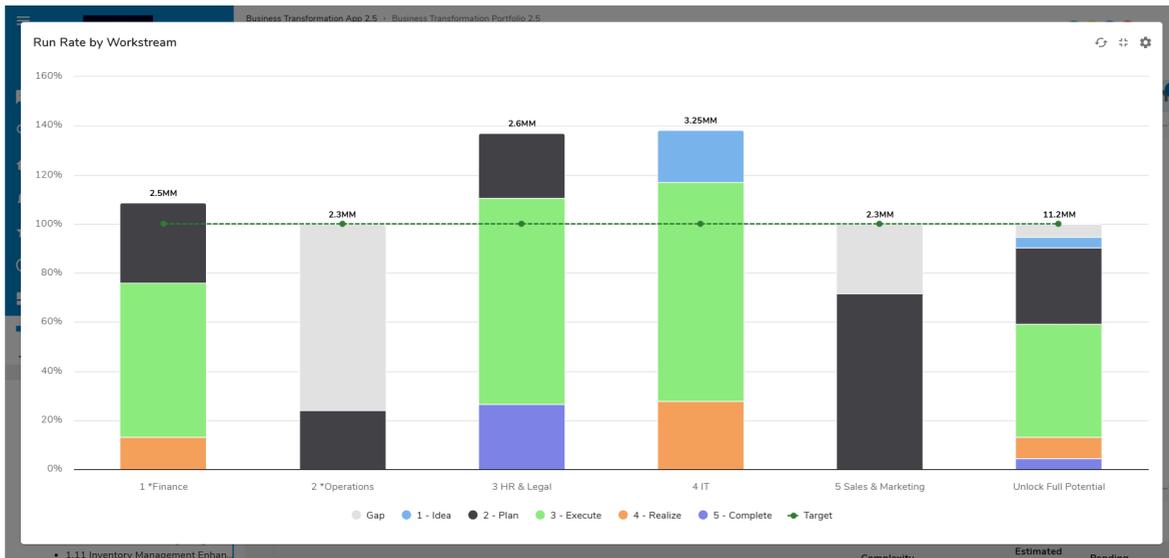
Applicable to

- Table, Metric Table, Tree View, Charts, Board

Set up

- On the top right of a section, select the 'Maximize' icon. To exit full screen, select the 'Minimize' icon.

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Sunset Notice: Open Resources

Summary

- With the deployment of **Release 246.0 on May 2, 2026**, Shibumi will be retiring the Open Resource capability.

- Open Resources were historically used as placeholder users when assigning roles to work items.

- New platform capabilities provide alternative ways to manage role assignments, including bulk edit and/or importing updates to roles.

- Shibumi also plans to introduce the ability to assign Groups to Roles. We anticipate phase one of this functionality to be available in May.

- When the Group assignment to Roles capability is introduced, we will sunset the Open Resource functionality. Any Open Resources currently assigned to roles will be automatically removed.

- As we approach Release 246.0, please contact your Shibumi account team to review the existing Open Resources used in your solution. If needed, you can replace the Open Resources with appropriate users prior to the May release.

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