

# 245.1-5 & 246.0 Release Notes

02 May 2026

# 245.1-5 Contents

## Issue Resolutions

- Editing Assign Role rule does not allow adding users
- Context Type is always blank on History view
- Users can't create child items from legacy dashboard unless they have a role at the context level
- Users with disabled roles cause participant window to break
- Custom roles should not be selectable on dashboards and presentations
- Picklist attribute template default with no matching option prevents creating work items
- Association fields not providing options/typeahead in List create

# 246.0 Contents

## Enhancements

- Administration: Operations Admin Role
- Administration: Extended visibility of Template Icons
- Business Rules: Trigger a rule on an ancestor item or association
- Expressions: New join, union, and unionIf functions
- Metrics: Between Dates Editability Rule
- Page Filters: Persist filter settings
- Tables/Board: Set the order of Create menu items

## Issue Resolutions

- Admin does not get error when saving invalid metric calculation
- Cannot delete safelist patterns with delimiting characters
- Aggregation Avg to match between Card and Table
- Chart labels/visuals persist on screen when navigating to a different tab

## Advanced Administrative Notice

- Admin Open Resources (Placeholders) coming with Release 247.0

# Administration: Operations Admin Role

## Summary

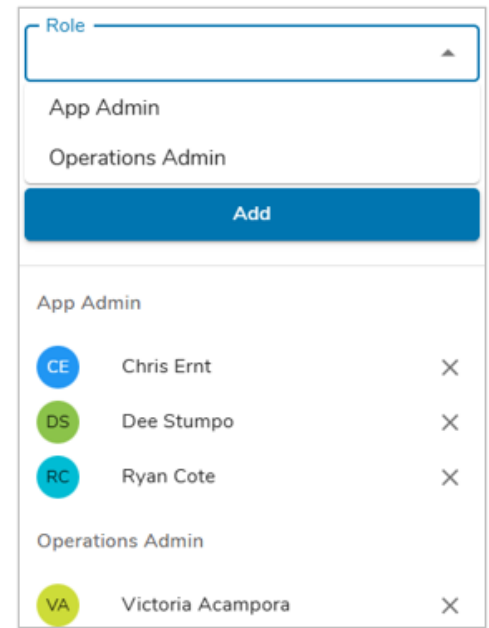
- Previously, access to administrative tools - such as Attribute Metadata, Attribute Usage, Restore Deleted Items, and Rules Log - was limited to App Admins, requiring them to manage both solution configuration and day-to-day operational support.
- As solutions scaled, organizations needed a way to delegate operational responsibilities to trusted users without granting full App Admin access. This separation was important to maintain governance over configuration while enabling faster, more responsive support for common administrative tasks.
- Now, Shibumi introduces the Operations Admin role, allowing App Admins to grant access to key administrative functions without exposing template configuration. With access to the Admin tab and its supporting tools, organizations can distribute support responsibilities, improve responsiveness, and maintain a strong governance model that balances access with control.

## Applicable to

- Apps, App Administration

## Prerequisites

- An App Admin must assign a user as an Operations Admin.



## Notes

- Operations Admins are visible in the Participant window on an App, and can designate additional Operations Admins as needed.
- Operations Admins have access to the Admin tab on an App.

# Business Rules: Trigger rule on an ancestor or association

## Summary

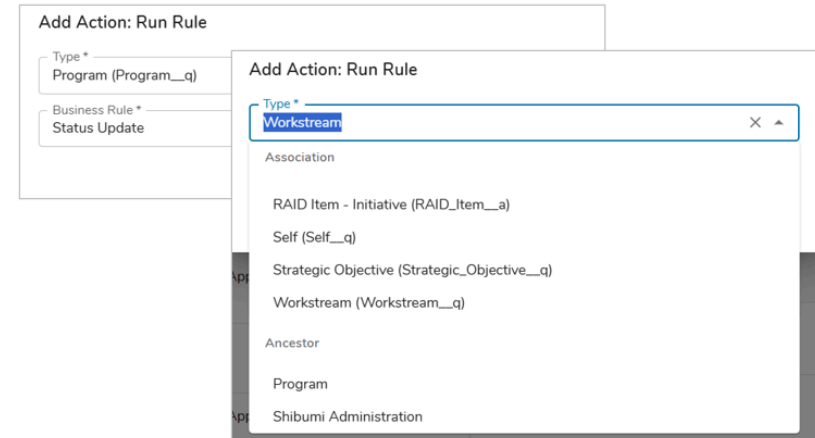
- Previously, Business Rules could trigger actions on child items or backreference associations, enabling automation to flow downward or across related records within the solution.
- In order to initiate Business Rules on an ancestor level (e.g., when a Milestone is marked complete, there may be a need to change the overall status at the Initiative-level), App Admins defined administrative attributes and set up complex logic to initiate Business Rules.
- Now, the Run Rule action supports triggering rules on ancestor items and associated work items, which simplifies upstream and cross-stream automation, creating more connected and responsive workflows.

## Applicable to

- Business Rules, Associations

## Set up

- On a Template, open the Data Panel and select Business Rules tab.



## Set up cont.

- On the Business Rules Tab, select the '+ Add Rule' button. Define a Name and select 'Create'. Define one or more Run triggers, and its respective attribute(s).
- Define a condition for the Business Rule, under 'If True' click on the blue '+' and choose the 'Run Rule' option.
- Select an ancestor or association, based on the template type a drop down list of available Business Rules will be provided. Choose a Rule from the drop down and select Save. Publish.

# Expressions: New join, union, and unionIf functions

## Summary

- Previously, the expression language supported calculations across attributes and related data. However, as solutions became more interconnected, App Admins needed more flexible ways to aggregate and displays sets of values from related records.
- Now, three new functions - unionIf, union, and join - enhance how values can be combined and displayed. **unionIf** rolls up values across descendent or related items, **union** allows you to combine multiple unionIf's. Building on these, the **join** function converts the resulting list into a formatted, filterable text string
- Together, these functions enable the creation of clean, structured lists from text, pick list, and association data. For example, an Initiative can display a semicolon-separated list of dependency outline numbers, providing a concise, easy-to-read summary that improves visibility and supports more effective filtering and analysis.

## Applicable to

- Expression Language, Associations, Pick Lists, Text Attributes

The screenshot shows two instances of the 'Calculation / Editable Rule' configuration interface. The top instance shows the 'Expression' field with the formula `unionIf(Initiative__a, name, true)` and a dropdown menu for 'Dependent Initiatives' with the value 'Dynamic Pricing Strategy with AI, New Market Expansion, Strategic Partnerships & Alliances'. The bottom instance shows the 'Expression' field with the formula `join(";", unionIf(Initiative__a, name, true))` and a dropdown menu for 'Dependent Initiative List' with the value 'Dynamic Pricing Strategy with AI;New Market Expansion;Strategic Partnerships & Alliances'. Both instances have a 'Calculated' dropdown menu.

## Syntax

- unionIf(template API name, value, condition)
  - Ex. EU\_Territories\_\_c = unionIf(Territory\_\_t, name, Region\_\_c = "Europe")
  - Ex. NA\_Territories\_\_c = unionIf(Territory\_\_t, name, Region\_\_c = "North America")
- union(first value, second value, ...)
  - Ex. All\_Territories\_\_c = union(EU\_Territories\_\_c, NA\_Territories\_\_c)
- join(separator, value)
  - Ex. join(";", All\_Territories\_\_c)

# Metrics: Between Dates Editability Rule

## Summary

- Previously, Metric editability could be controlled using rules such as an expression or a Before Date/After Date time period.
- As organizations aligned Metric updates with defined planning and reporting cycles, there was an opportunity to more precisely control when data could be entered within a specific window of time.
- Now, Metrics support a Between Dates Editability Rule, allowing App Admins to define specific timeframes during which values can be entered or updated. For example, during annual planning, Initiative owners can update forecasts within a defined window, after which the data is locked to support static analysis.

## Applicable to

- Metrics, Editability Rule

## Set up

- On a Template, open the Data Panel and navigate to the 'Metric Data Sets' tab.
- In the Actions column, select the Edit icon for a Metric Data Set.

Editable Rule: Actual

Never Editable

Expression

Always Editable fx

Time Period

Between ▼ Start\_Date\_\_c fx Stage\_4\_Approval\_Dat fx  
e\_\_c

Cancel Update

## Set up cont.

- In the 'Time Period' section of the Editable Rule dialog, select the 'Between Dates' option from the drop down.
- Hard-code a date or use the Shibumi Expression Language to define a dynamic date range. Select 'Update'.
- Save and Publish.

# Page Filters: Persist filter settings

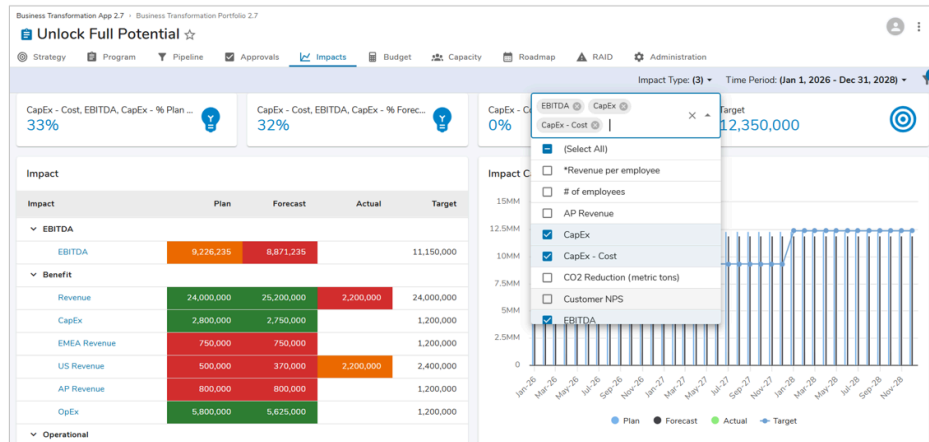
## Summary

- Previously, Page Level Filters could be applied to help filter and spotlight program content.
- Users relied on filters to analyze data from specific perspectives, however, these filters would reset when the user navigated away from the page.
- For example, at the Program level a Workstream filter limits the Initiatives displayed in a Table section. When users click a hyperlink to open an Initiative from the Table, the Initiative is displayed within the same browser tab. If the user returns to the Program level, the filter selections are set back to default.
- Now, Page Level Filters persist within the browser tab, allowing applied filters to remain in place when users navigate away and return to a dashboard or work item. This enables users to maintain their preferred view without needing to reapply filters each time. A full browser refresh will reset filters to their default, ensuring consistency when needed.

## Applicable to

- Page Level Filters

For Shibumi Customer and Partner Use Only.



## Set up

- No setup required.

# Tables/Board: Set the order of Create menu items

## Summary

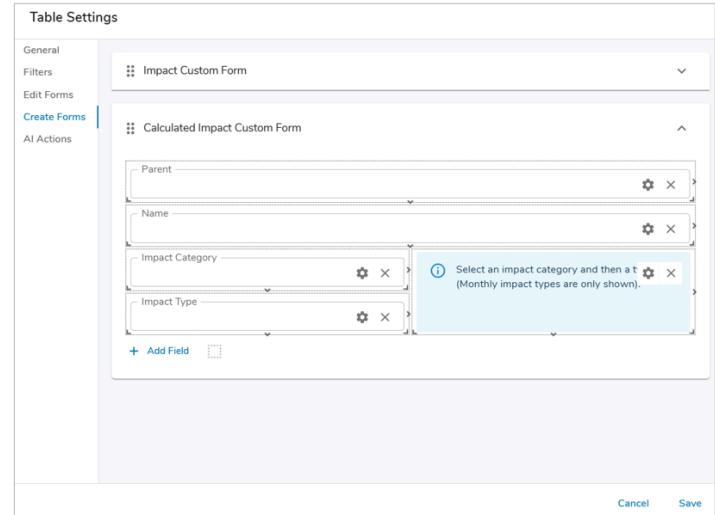
- Previously, create menu options in Table and Board sections were displayed in alphabetical order, regardless of how work items were structured within the solution.
- With the ability for Table sections to allow creation of any descendent, alphabetized menu options could be confusing. For example, in a solution that has Workstreams containing Initiatives that contain Milestones the alphabetized menu options would place the top level item at the bottom of the create menu.
- Now, App Admins can define the order of Create menu items within Table and Board sections. This allows options to be sequenced to reflect the solution structure, e.g., Workstreams, then Initiatives, then Milestones - providing a more intuitive and guided experience when creating new work items.

## Applicable to

- Tables, Boards, Create Forms

## Set up

- Open the Settings dialog on a Table or Board section.



## Set up cont.

- On the General tab of the Settings dialog, ensure that 'Custom Form' is defined for the Create Form drop down.
- Navigate to the 'Create Forms' tab of the settings dialog.
- Hovering over the header for each Custom Form, utilize the 'grabber' icon to drag and reorder the form.
- Save and Publish.

# Administrative Notice: App Managed Placeholders

## Summary

- Coming with Release 247.0 (anticipated May 30th), Open Resources will be replaced with App Managed Placeholders and will be moved under the App Details page.
- Admins will manage Placeholders (Open Resources) centrally from a new App-level interface on the Placeholder tab (create, rename, delete). Existing Placeholders (Open Resources) will be migrated automatically - no action required to retain current assignments.
- Instance users will no longer create Placeholders (Open Resources) through participant selection, bulk edit, or import. Instead, they will continue assigning Placeholders (Open Resources) to roles as needed, but Admins will maintain the roster of available Open Resource options.
- Managing the list of Open Resource options will be available to both App and Operations Admins.

## Applicable to

- Open Resources, App & Operations Admins



## Timing

- Anticipated Release 247.0: May 30th, 2026