

release notes

settings version 1.8

orgvue settings 1.8 release notes

November 09, 2020

Introduction

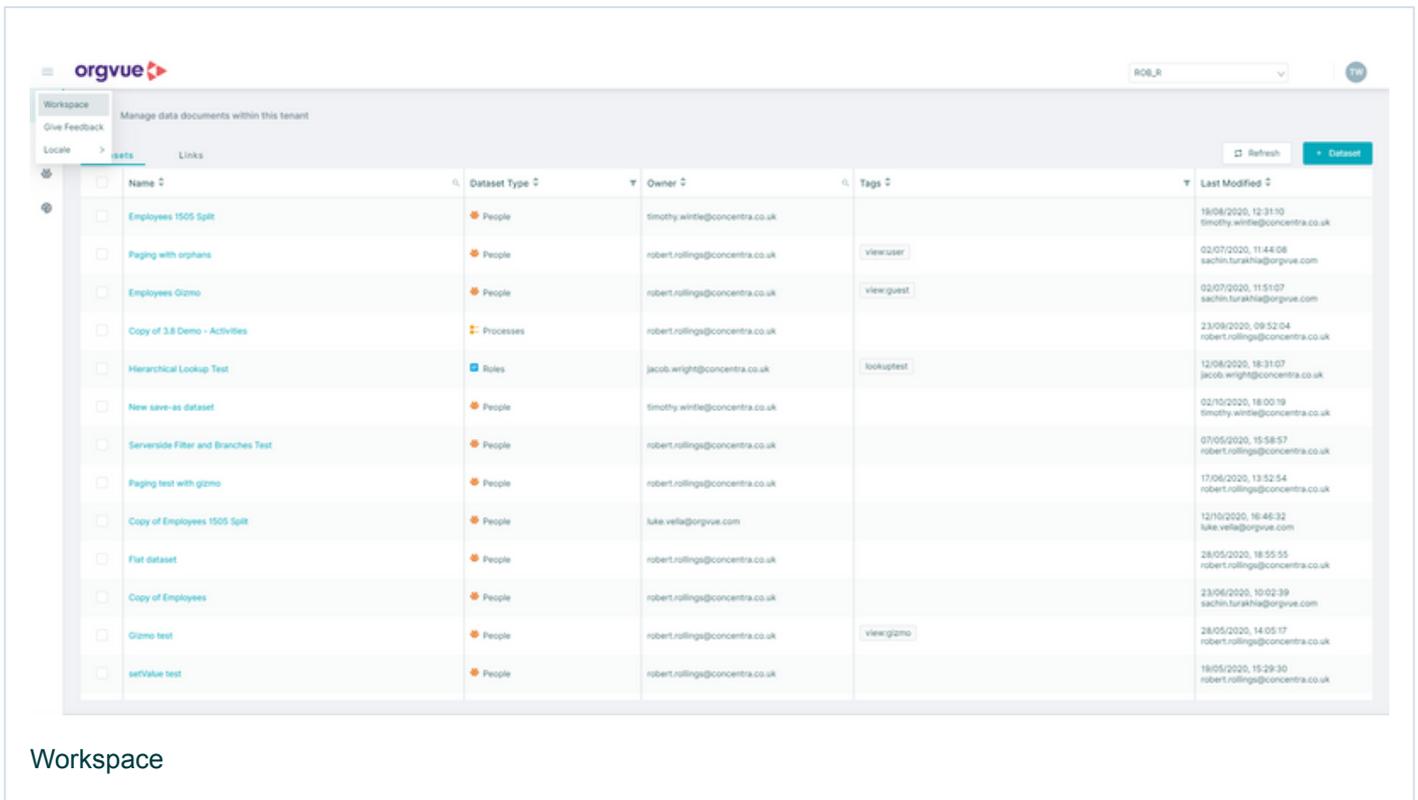
Settings 1.8 enhances existing functionality to help users manage their data in orgvue. Highlights include the ability to create a save-as and change the parent-by of a Dataset.

Key features in 1.8:

1. Navigate to workspace
2. Download date formats
3. Create a save-as of a Dataset
4. Ability to change the parent-by of a Dataset
5. Master/Sub-tenant lookups
6. Re-order custom colors

1. Navigate to workspace

From the burger menu in Settings users can now navigate directly to the most recent version of Workspace.



The screenshot displays the orgvue Workspace interface. At the top left, the orgvue logo is visible. Below it, a navigation menu includes 'Workspace', 'Give Feedback', 'Locale', 'sets', and 'Links'. The main content area is a table with the following columns: Name, Dataset Type, Owner, Tags, and Last Modified. The table lists various datasets, including 'Employees 1505 Split', 'Paging with orphans', 'Employees Gizmo', 'Copy of 3.8 Demo - Activities', 'Hierarchical Lookup Test', 'New save-as dataset', 'Serverside Filter and Branches Test', 'Paging test with gizmo', 'Copy of Employees 1505 Split', 'Flat dataset', 'Copy of Employees', 'Gizmo test', and 'setValue test'. Each row includes a checkbox, a name, a dataset type (e.g., People, Roles, Processes), an owner email, tags (e.g., viewuser, viewguest, lookupstest, viewgizmo), and a last modified timestamp.

Name	Dataset Type	Owner	Tags	Last Modified
Employees 1505 Split	People	timothy.wintie@concentra.co.uk		19/08/2020, 12:31:10 timothy.wintie@concentra.co.uk
Paging with orphans	People	robert.rollings@concentra.co.uk	viewuser	02/07/2020, 11:44:08 sachin.turakhia@orgvue.com
Employees Gizmo	People	robert.rollings@concentra.co.uk	viewguest	02/07/2020, 11:51:07 sachin.turakhia@orgvue.com
Copy of 3.8 Demo - Activities	Processes	robert.rollings@concentra.co.uk		23/09/2020, 09:52:04 robert.rollings@concentra.co.uk
Hierarchical Lookup Test	Roles	jacob.wright@concentra.co.uk	lookupstest	12/08/2020, 18:31:07 jacob.wright@concentra.co.uk
New save-as dataset	People	timothy.wintie@concentra.co.uk		02/10/2020, 18:00:19 timothy.wintie@concentra.co.uk
Serverside Filter and Branches Test	People	robert.rollings@concentra.co.uk		07/05/2020, 15:58:57 robert.rollings@concentra.co.uk
Paging test with gizmo	People	robert.rollings@concentra.co.uk		17/06/2020, 13:52:54 robert.rollings@concentra.co.uk
Copy of Employees 1505 Split	People	luke.velia@orgvue.com		12/10/2020, 10:46:32 luke.velia@orgvue.com
Flat dataset	People	robert.rollings@concentra.co.uk		28/05/2020, 18:55:55 robert.rollings@concentra.co.uk
Copy of Employees	People	robert.rollings@concentra.co.uk		23/06/2020, 10:02:39 sachin.turakhia@orgvue.com
Gizmo test	People	robert.rollings@concentra.co.uk	viewgizmo	28/05/2020, 14:05:17 robert.rollings@concentra.co.uk
setValue test	People	robert.rollings@concentra.co.uk		18/05/2020, 15:29:30 robert.rollings@concentra.co.uk

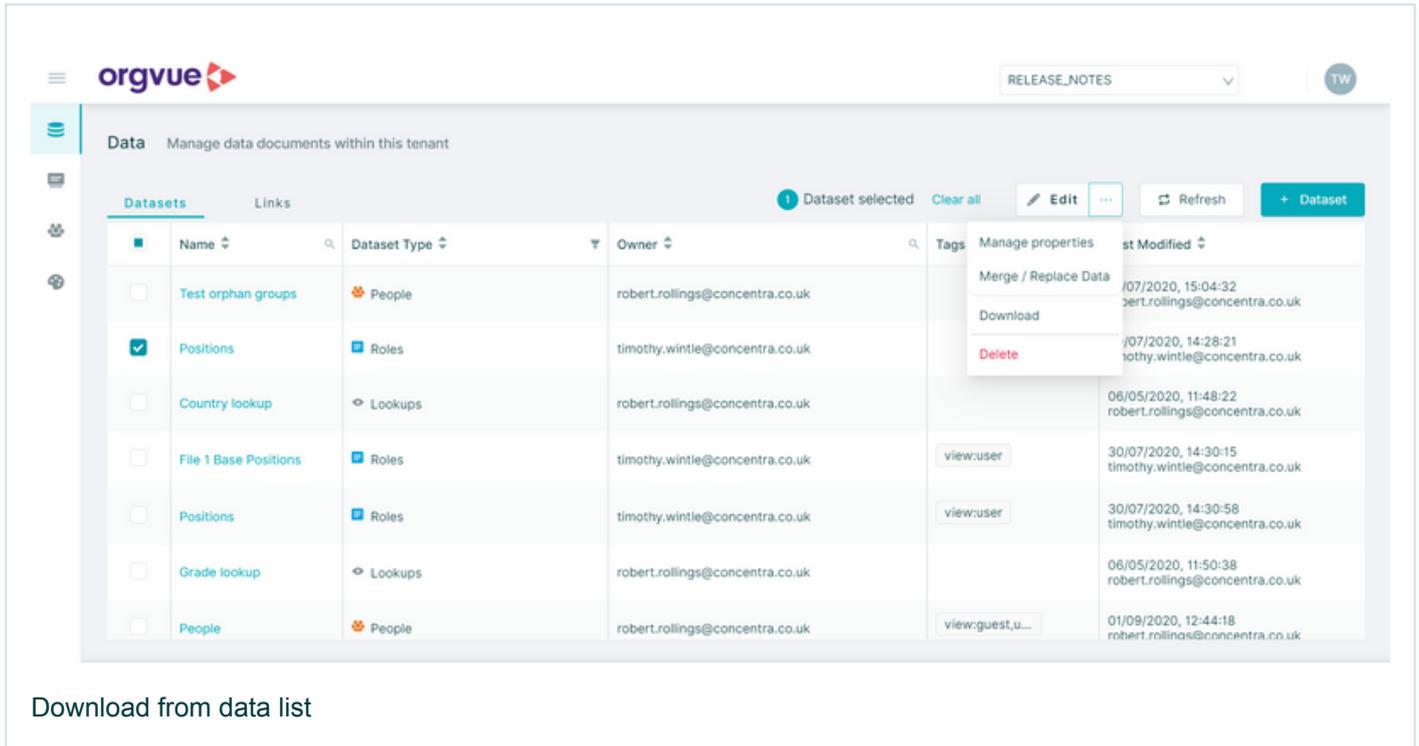
Workspace

2. Download date formats

Users have the ability to download the data out of settings with the choice of date formats. This functionality only applies to properties that are of type **date**. Only on-demand calculated properties will be downloaded from the Dataset during the download process. To export all calculated properties users can download from Workspace. Pack calculations will also not be included.

Formats available:

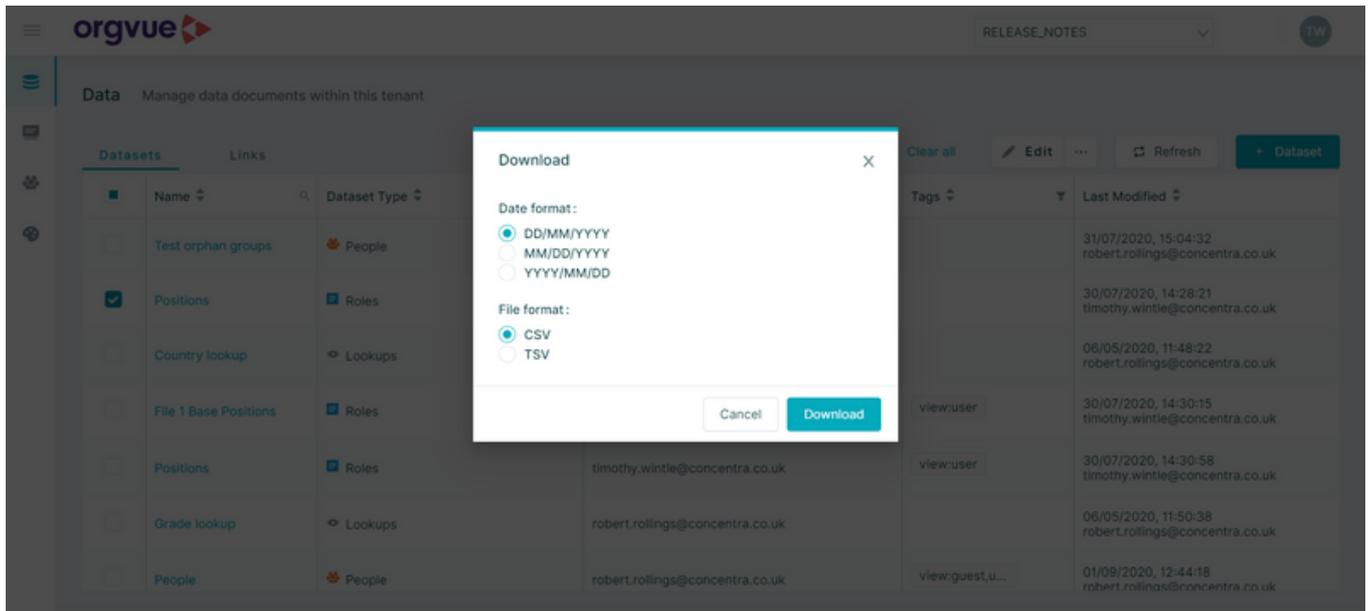
1. DD/MM/YYYY
2. MM/DD/YYYY
3. YYYY/MM/DD



The screenshot shows the 'Data' management interface in orgvue. The main table lists datasets with columns for Name, Dataset Type, Owner, Tags, and Last Modified. A context menu is open over the 'Positions' dataset, showing options: Manage properties, Merge / Replace Data, Download, and Delete. The 'Download' option is highlighted in red.

Name	Dataset Type	Owner	Tags	Last Modified
Test orphan groups	People	robert.rollings@concentra.co.uk		07/2020, 15:04:32 robert.rollings@concentra.co.uk
<input checked="" type="checkbox"/> Positions	Roles	timothy.wintle@concentra.co.uk		07/2020, 14:28:21 timothy.wintle@concentra.co.uk
Country lookup	Lookups	robert.rollings@concentra.co.uk		06/05/2020, 11:48:22 robert.rollings@concentra.co.uk
File 1 Base Positions	Roles	timothy.wintle@concentra.co.uk	view:user	30/07/2020, 14:30:15 timothy.wintle@concentra.co.uk
Positions	Roles	timothy.wintle@concentra.co.uk	view:user	30/07/2020, 14:30:58 timothy.wintle@concentra.co.uk
Grade lookup	Lookups	robert.rollings@concentra.co.uk		06/05/2020, 11:50:38 robert.rollings@concentra.co.uk
People	People	robert.rollings@concentra.co.uk	view:guest,u...	01/09/2020, 12:44:18 robert.rollings@concentra.co.uk

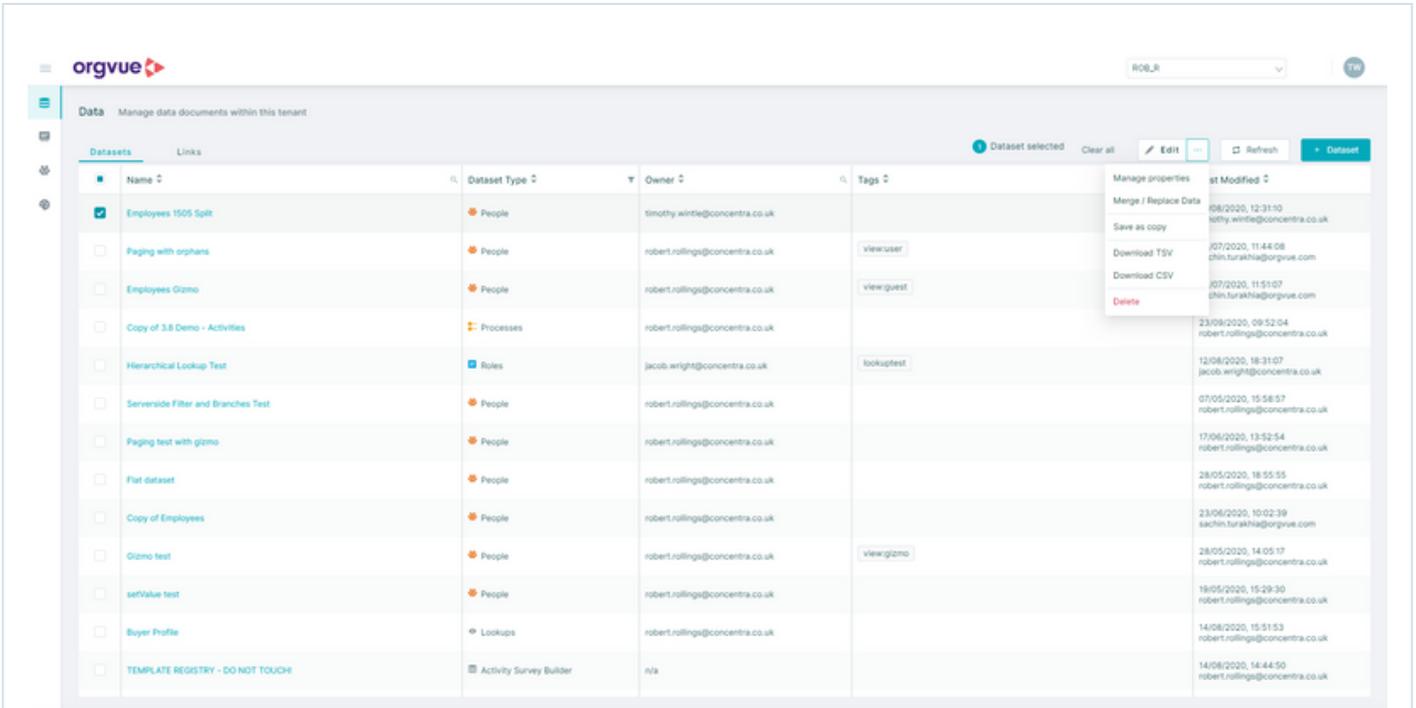
Download from data list



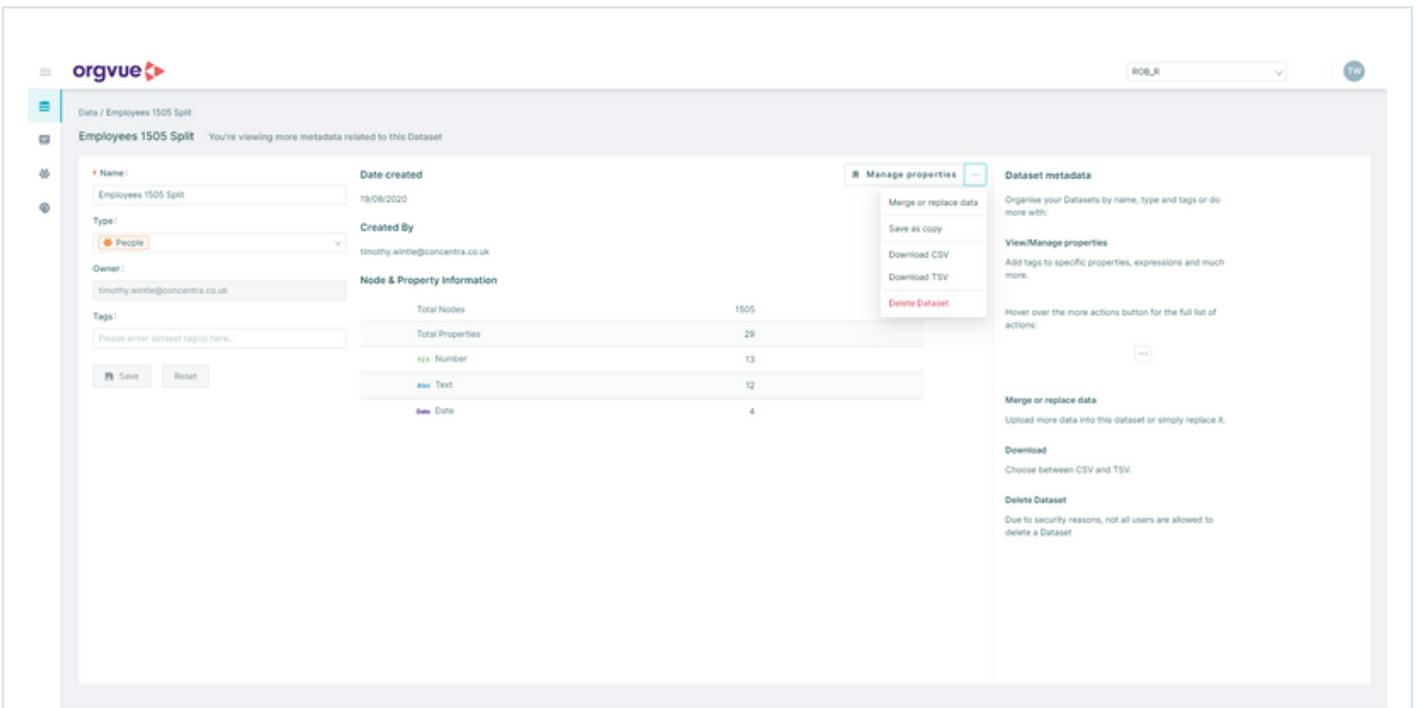
Download Options

3. Create a 'save-as' of a Dataset

Creating a 'save-as' is no longer a tough task. Through settings users can quickly find the Dataset they want to make a copy of and within a few clicks a new Dataset with the properties needed will be created. To create a save-as users can either select a dataset in the data tab and choose from the edit dropdown or users can find the save-as option from the edit metadata page.



Save-As Data List

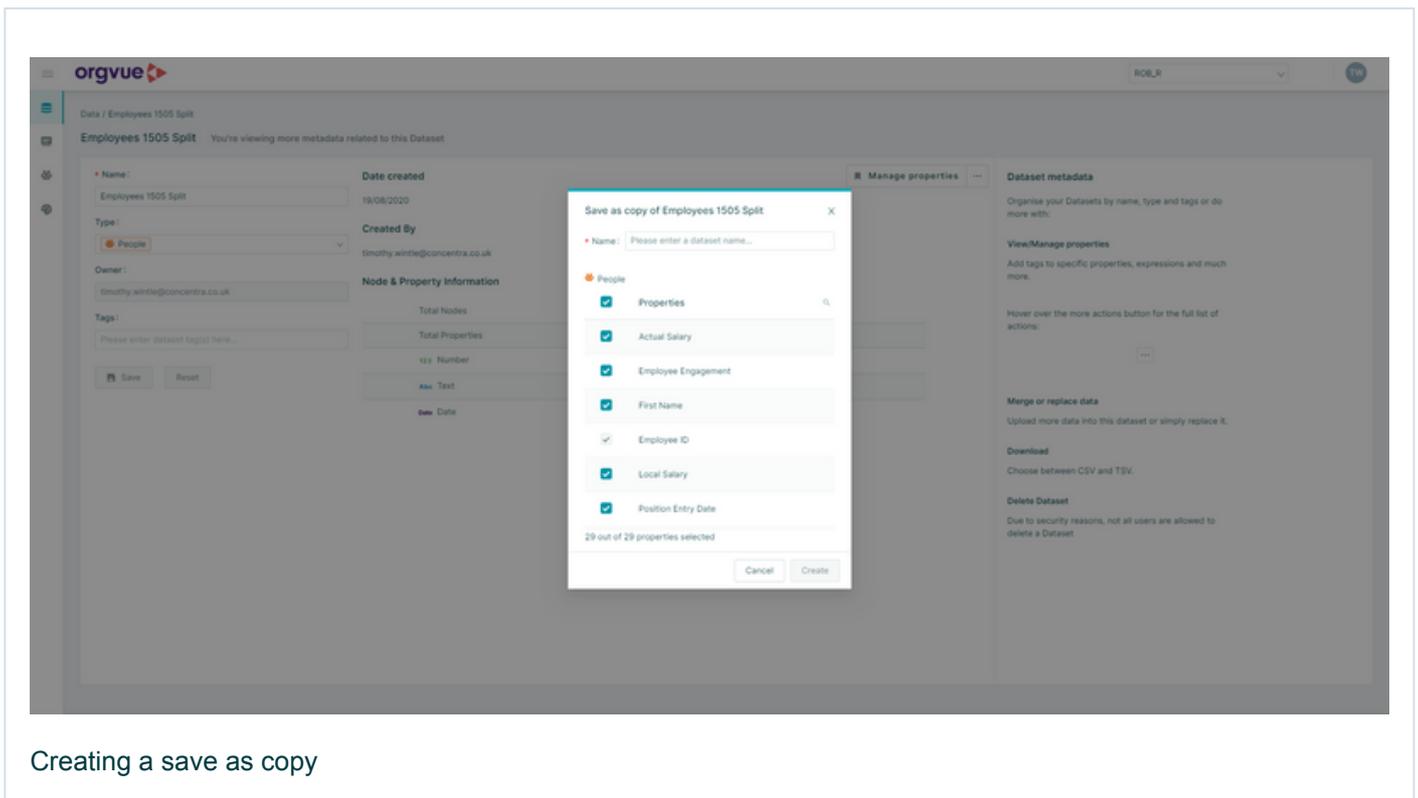


Save-As Edit Metadata

Users can select 'save-as' copy which will provide the user the option to select the properties that they would like to include. Users will only be able to create a save-as of the properties that they have access to. Note the following when creating a save-as:

1. Dataset name must be unique and the user will be prevented from saving if the name is not unique.
2. The user cannot de-select required fields. Required fields are defined as the Unique ID, label and the parent ID (if the Dataset is hierarchial).
3. Property tags will be brought across into the new Dataset
4. Dataset tags will not exist on the 'save-as'
5. All formats, expressions and lookup configuration will be copied into the new Dataset

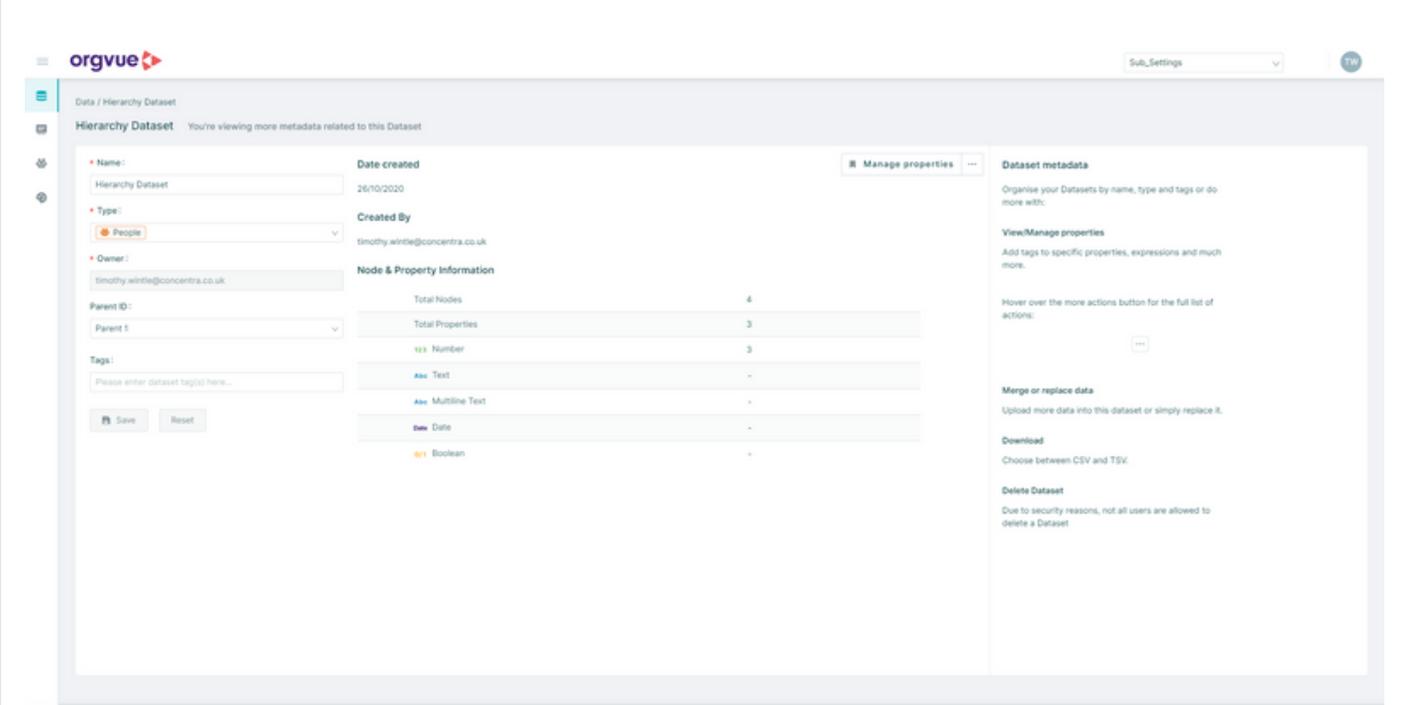
Once the Dataset has been created the user will navigate to the edit metadata page where the user can make further edits to the dataset and properties if required.



Creating a save as copy

4. Ability to change the parent-by of a dataset

Changing the parent by is now an option in the edit metadata page of the dataset where a new parent property can be selected. Changing the parent property will change the hierarchy in a pack created from a dataset in workspace. For any existing views or drafts this change will not propagate down and the initial parent by for the view and draft will remain.



The screenshot displays the 'Hierarchy Dataset' metadata page in the orgvue interface. The page is divided into several sections:

- Metadata Fields:** Includes 'Name' (Hierarchy Dataset), 'Date created' (26/10/2020), 'Type' (People), 'Owner' (timothy.winter@concentra.co.uk), and 'Parent ID' (Parent 1). A 'Parent 1' dropdown menu is highlighted, indicating the ability to change the parent property.
- Node & Property Information Table:**

Node & Property Information	
Total Nodes	4
Total Properties	3
Number	3
Text	-
Multiline Text	-
Date	-
Boolean	-
- Dataset metadata:** Includes sections for 'View/Manage properties', 'Merge or replace data', 'Download', and 'Delete Dataset'.

Change parent by

5. Master/Sub-tenant lookups

For master/sub-tenant structures it will be possible to create lookups in the master tenant which can be accessed from any sub-tenant of the master tenant.

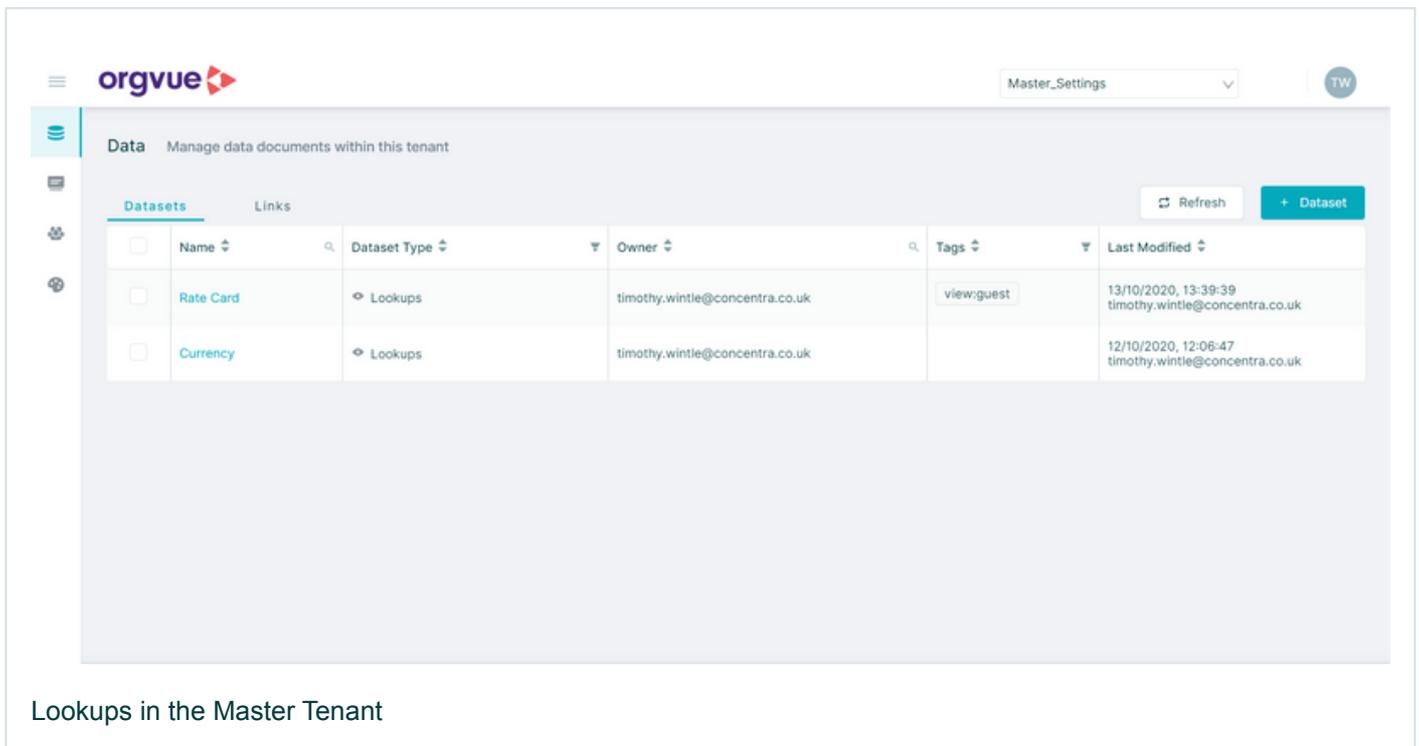
Creating a lookup: For a dataset to be available as a lookup in a sub-tenant users must do one of the following

1. Create the lookup in the lookups tab
2. Create a dataset as any type and tag it with "lookup"

Permissions

1. The lookup will become available to users in the sub-tenant when it is tagged as "view:guest" in the master tenant
2. If a user has the 'admin' role in both the master and sub-tenant then they will always have access to the lookup

Lookup dropdown Within the lookup dropdown users will be able to identify a lookup from a master tenant as an option with an information icon next to it.



The screenshot shows the 'Data' management interface in OrgVue. The main content area displays a table of datasets under the 'Datasets' tab. The table has the following columns: Name, Dataset Type, Owner, Tags, and Last Modified. Two datasets are listed:

Name	Dataset Type	Owner	Tags	Last Modified
Rate Card	Lookups	timothy.wintle@concentra.co.uk	view:guest	13/10/2020, 13:39:39 timothy.wintle@concentra.co.uk
Currency	Lookups	timothy.wintle@concentra.co.uk		12/10/2020, 12:06:47 timothy.wintle@concentra.co.uk

The interface also includes a sidebar on the left, a top navigation bar with the OrgVue logo, and a user profile icon labeled 'TW' in the top right corner.

Lookups in the Master Tenant

The screenshot displays the orgvue Property Manager interface for 'Employees'. A table lists various properties, with 'Currency' selected. A configuration panel on the right is open for 'Currency', showing options for 'Lookups'. A tooltip points to the 'Currency' dataset in the dropdown, stating 'This dataset is from the master tenant'.

Display Name	Property Key	Property Type	Property Tags
Bradfordfactor	bradfordfactor	Abc Text	
Categoryofleaver	categoryofleaver	Abc Text	
Continuousservicedate	continuousservicedate	Date Date	
<input checked="" type="checkbox"/> Currency	currency	Abc Text	
Dateofbirth	dateofbirth	Date Date	
Email	Email	Abc Text	

Editing: Currency

General Expressions **Lookups**

Lookup Type: Dataset

Currency

Restrict to lookup:

Sort alphabetically:

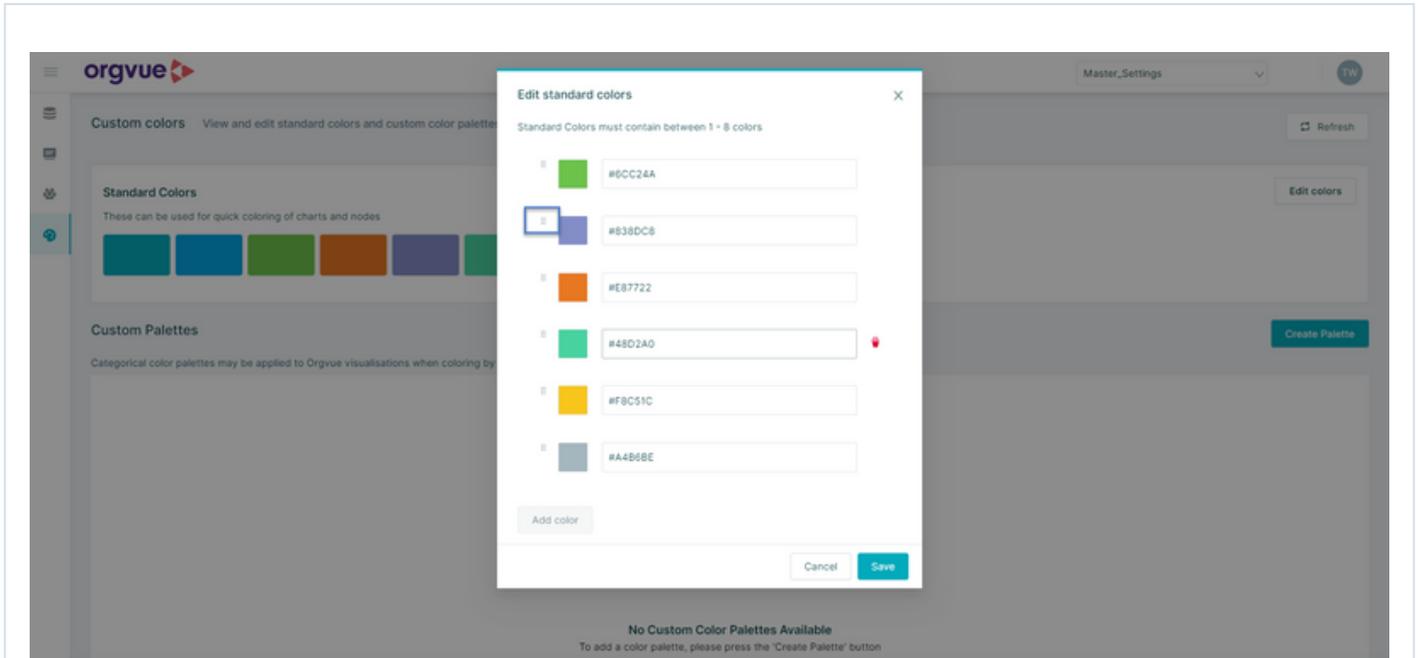
Close Apply

This dataset is from the master tenant

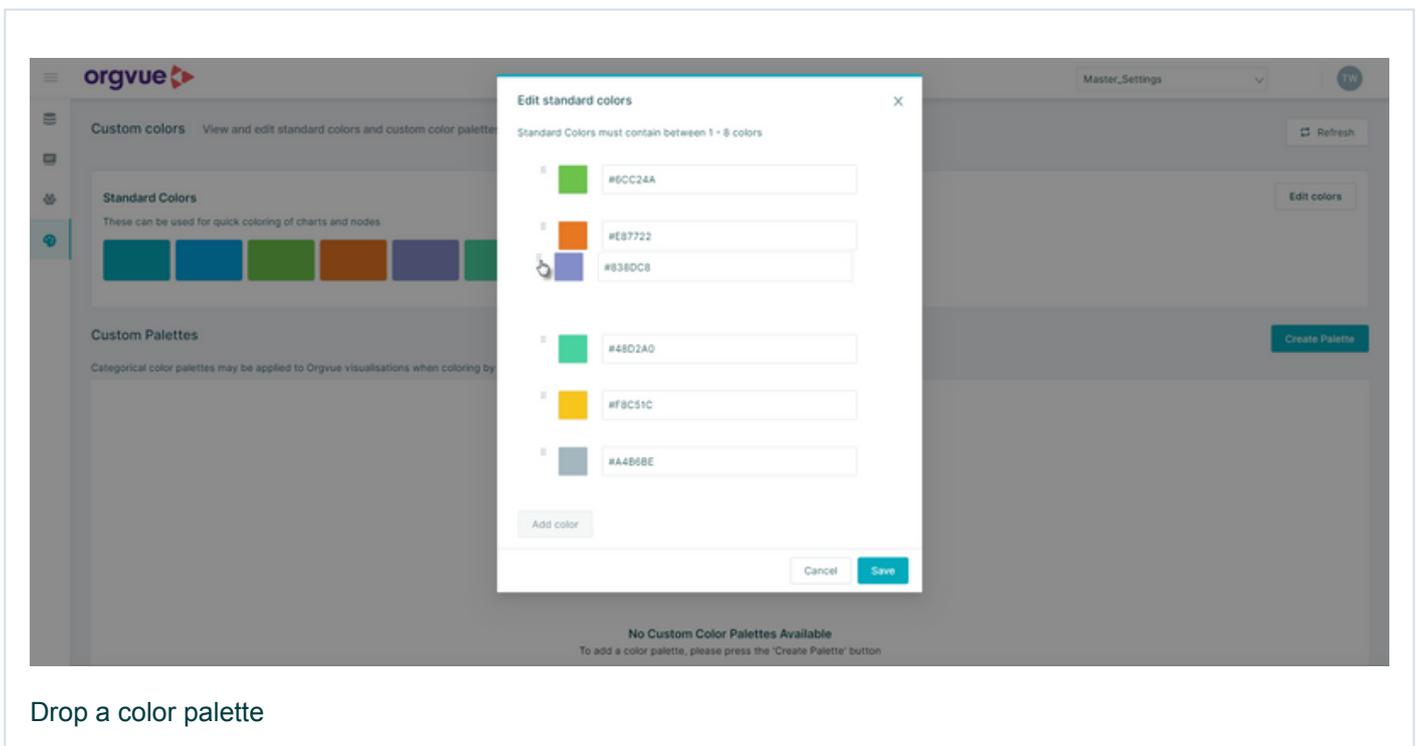
Lookups in the Sub Tenant

6. Re-order colors

Users will be able to drag and drop the colors within a color palette to re-order them during creation and when editing the colors. The re-ordering of the colors will be updated for all packs where the palette is used.



Drag a color palette



Drop a color palette