orgvue

Navigate to workspace

Download date formats

Ability to change the parent-by of a Dataset

Create a save-as of a Dataset

Master/Sub-tenant lookups

Re-order custom colors

release notes

settings version 1.8

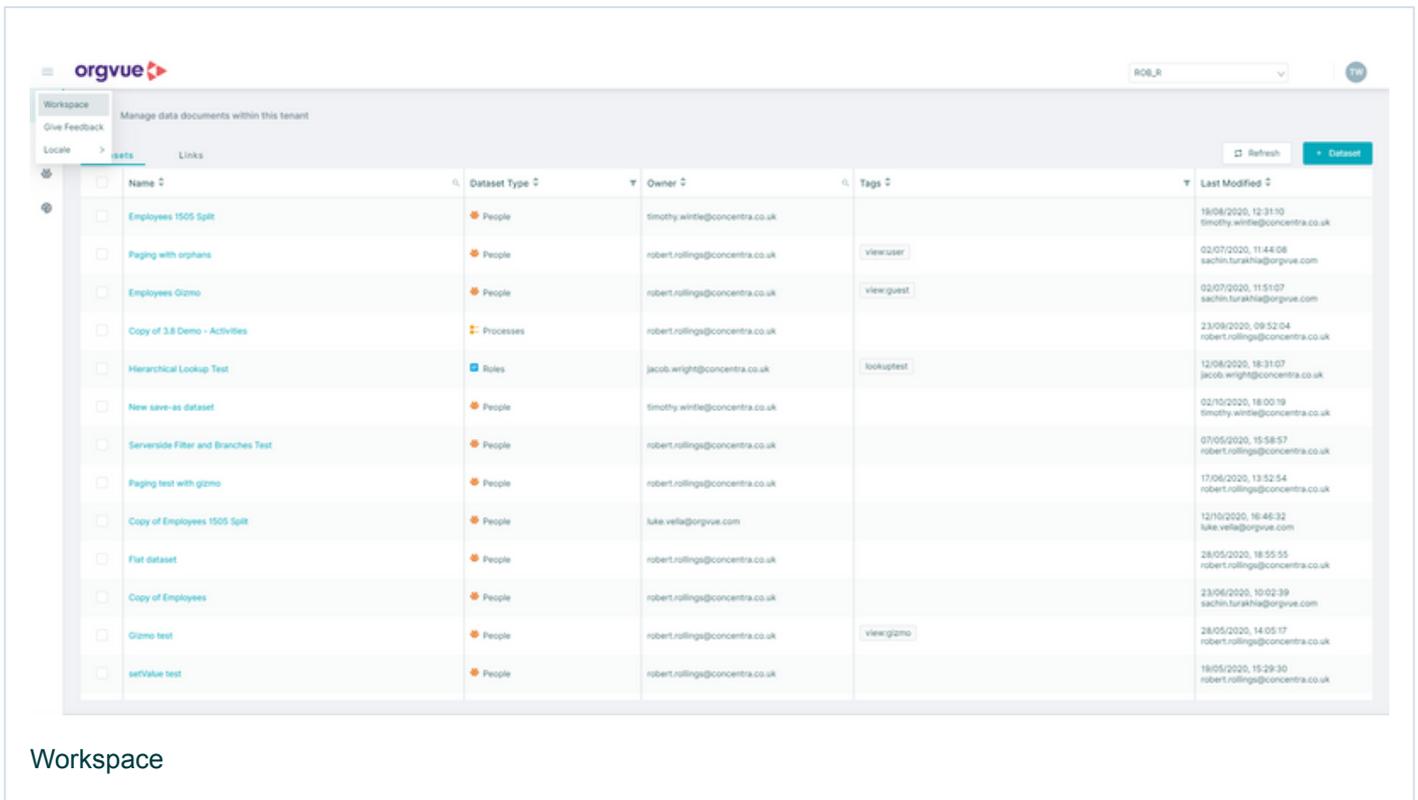# orgvue settings 1.8 release notes

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.
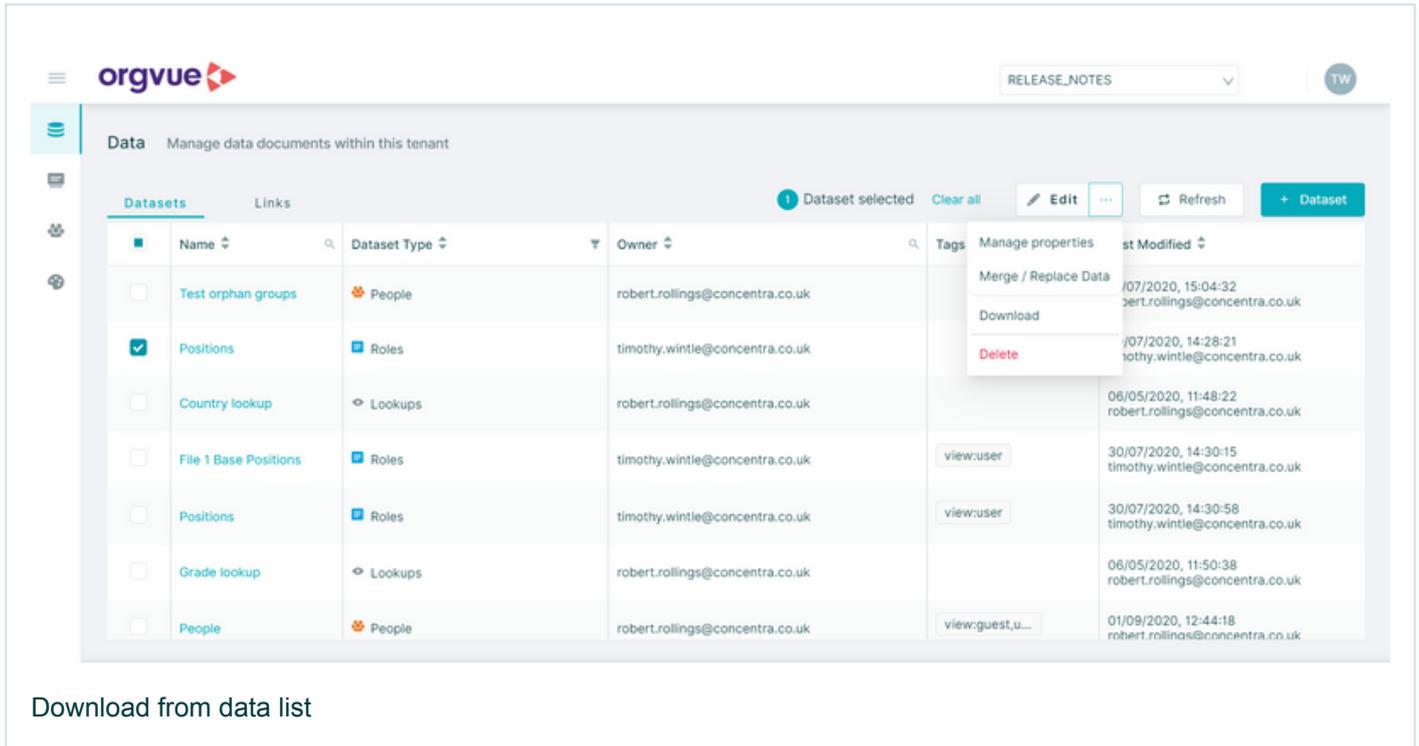

Workspace

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.
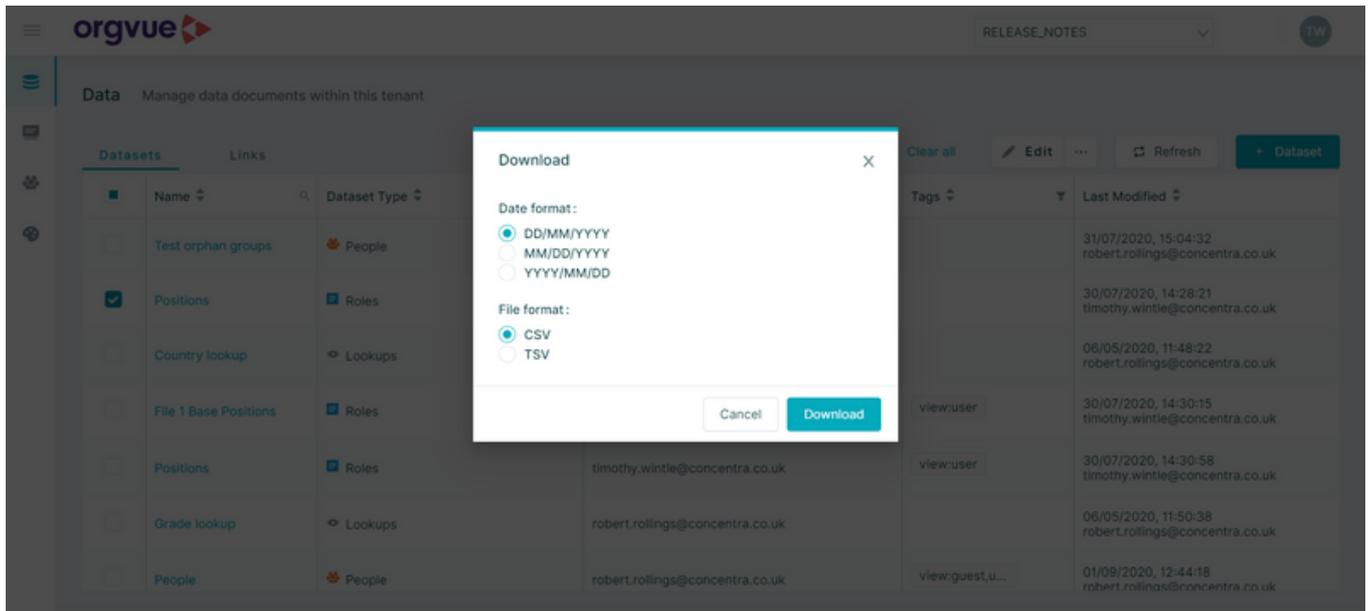
Formats available:

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

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.
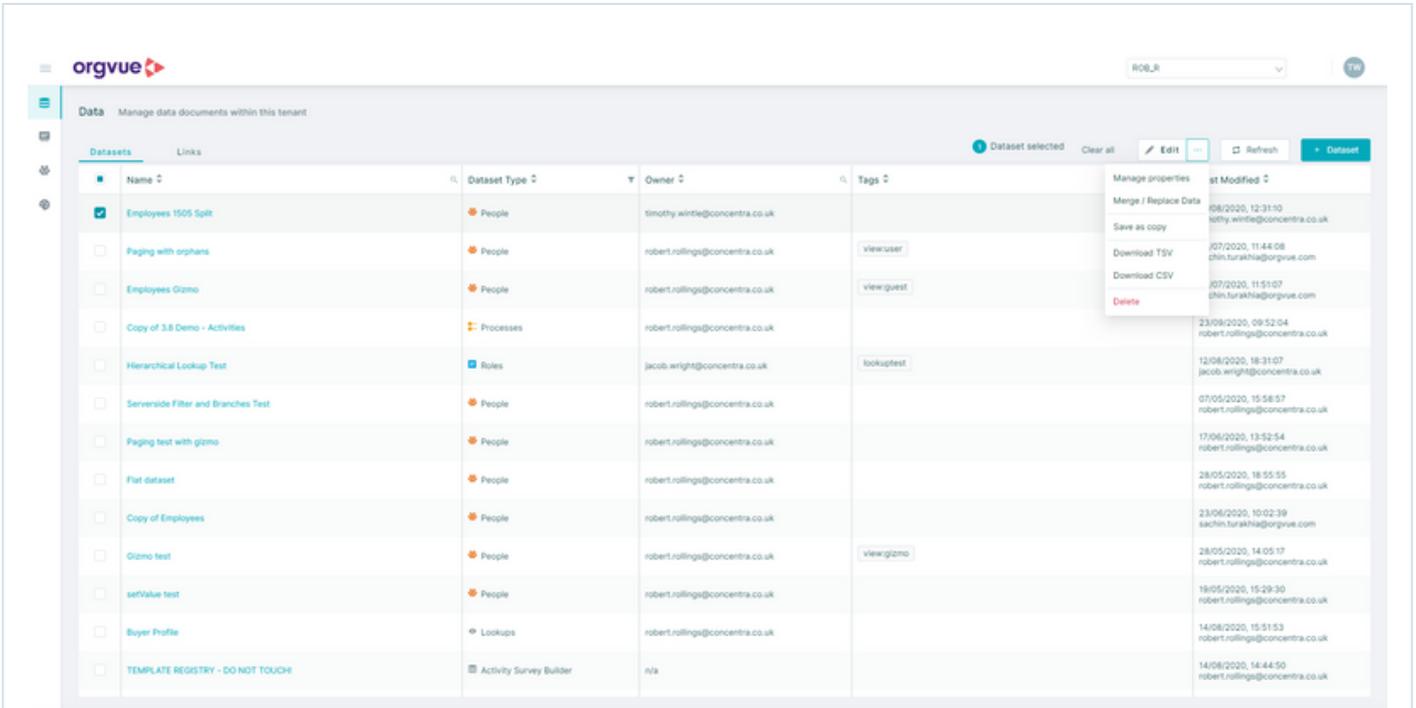
Save-As Data List
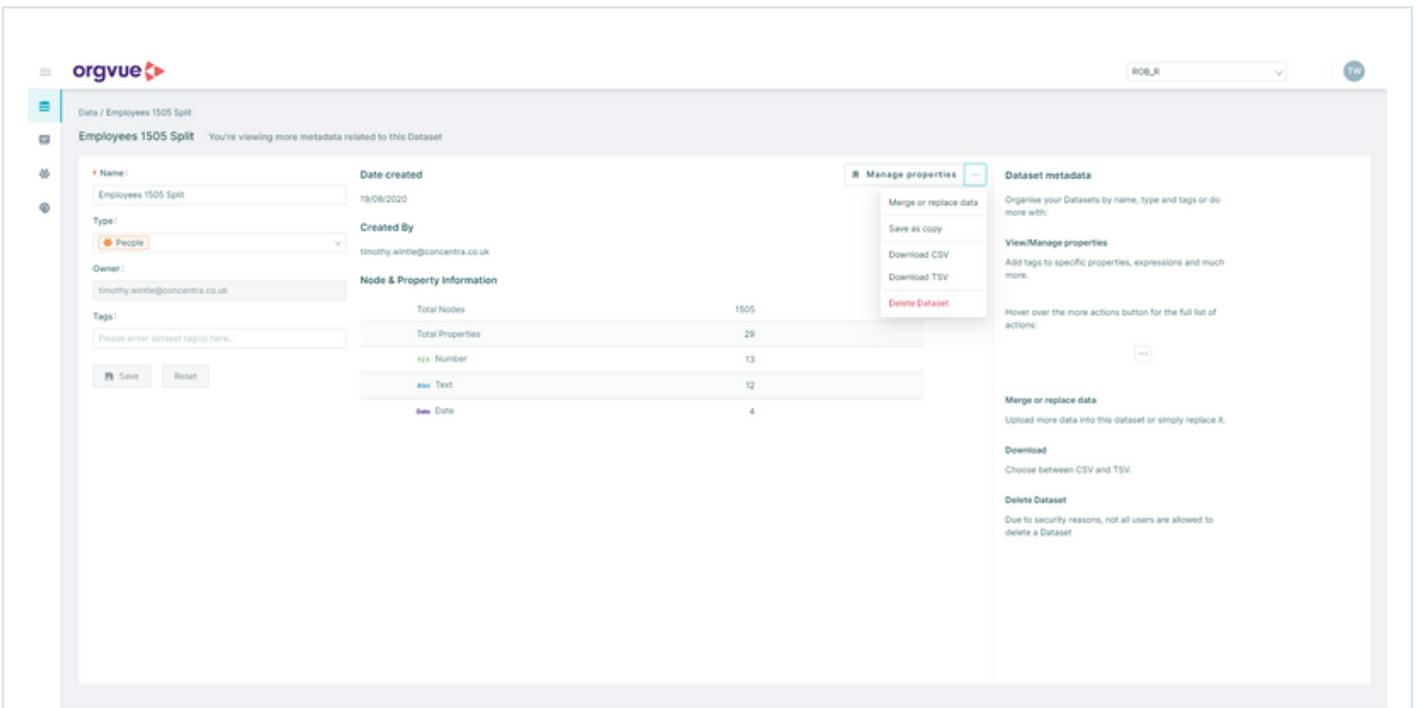
Save-As Edit Metadata

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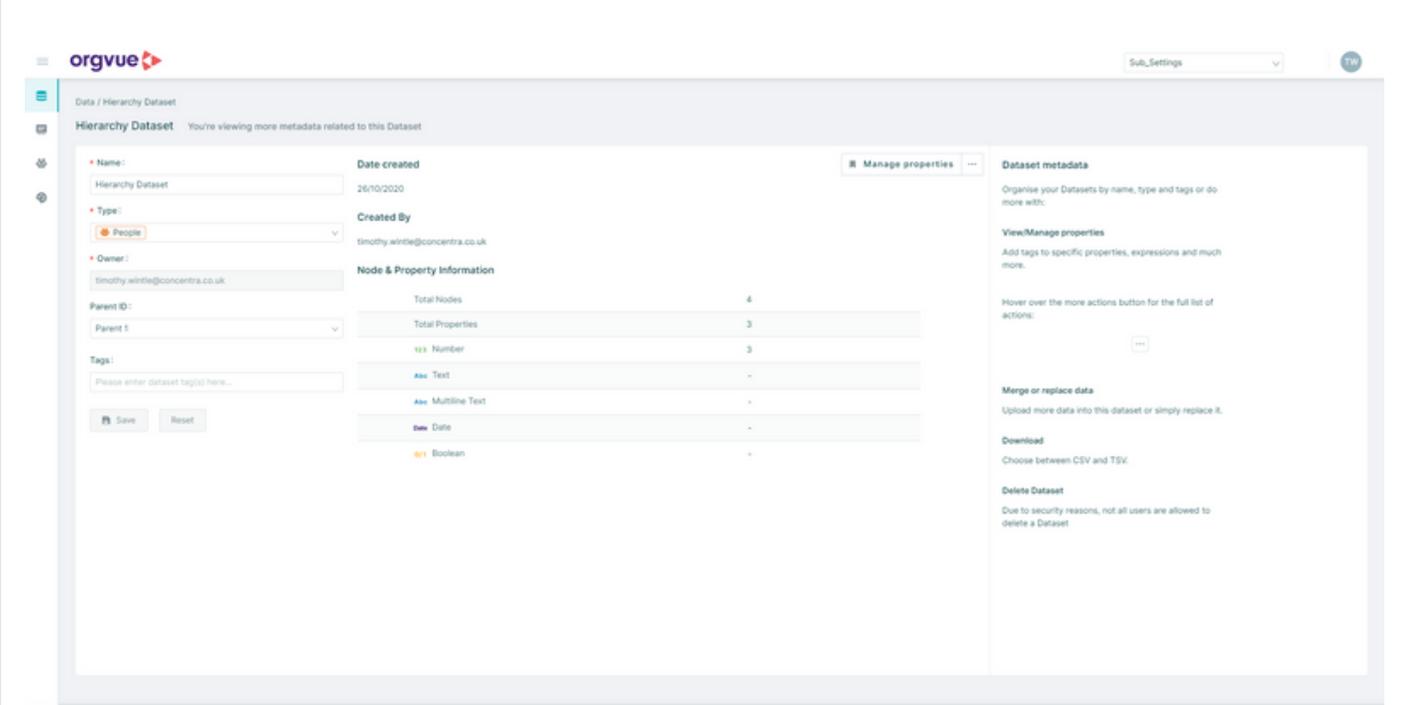
Once the Dataset has been created the user will navigate to the edit metadata page where the user can make further edits to the dataset and properties if required.
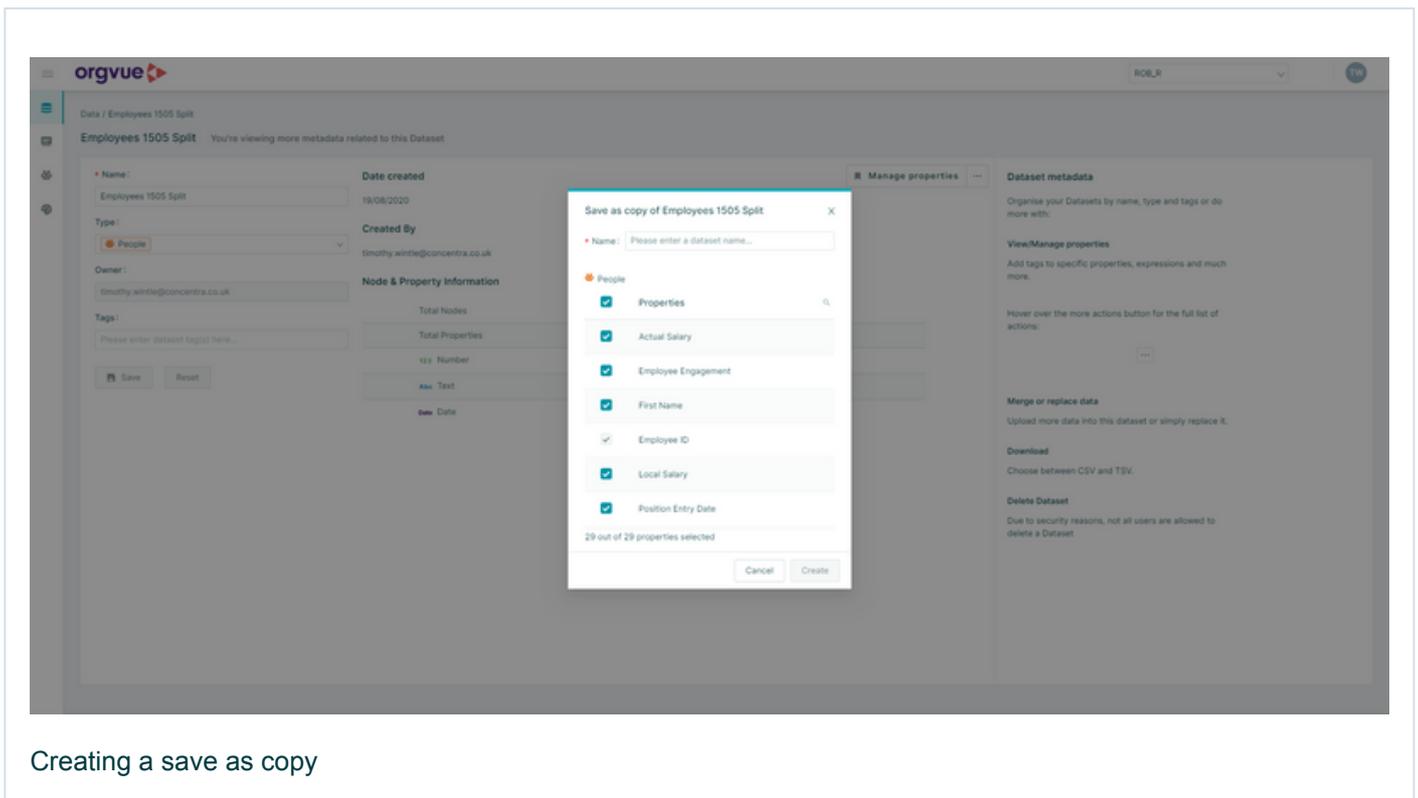
Creating a save as copy

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.

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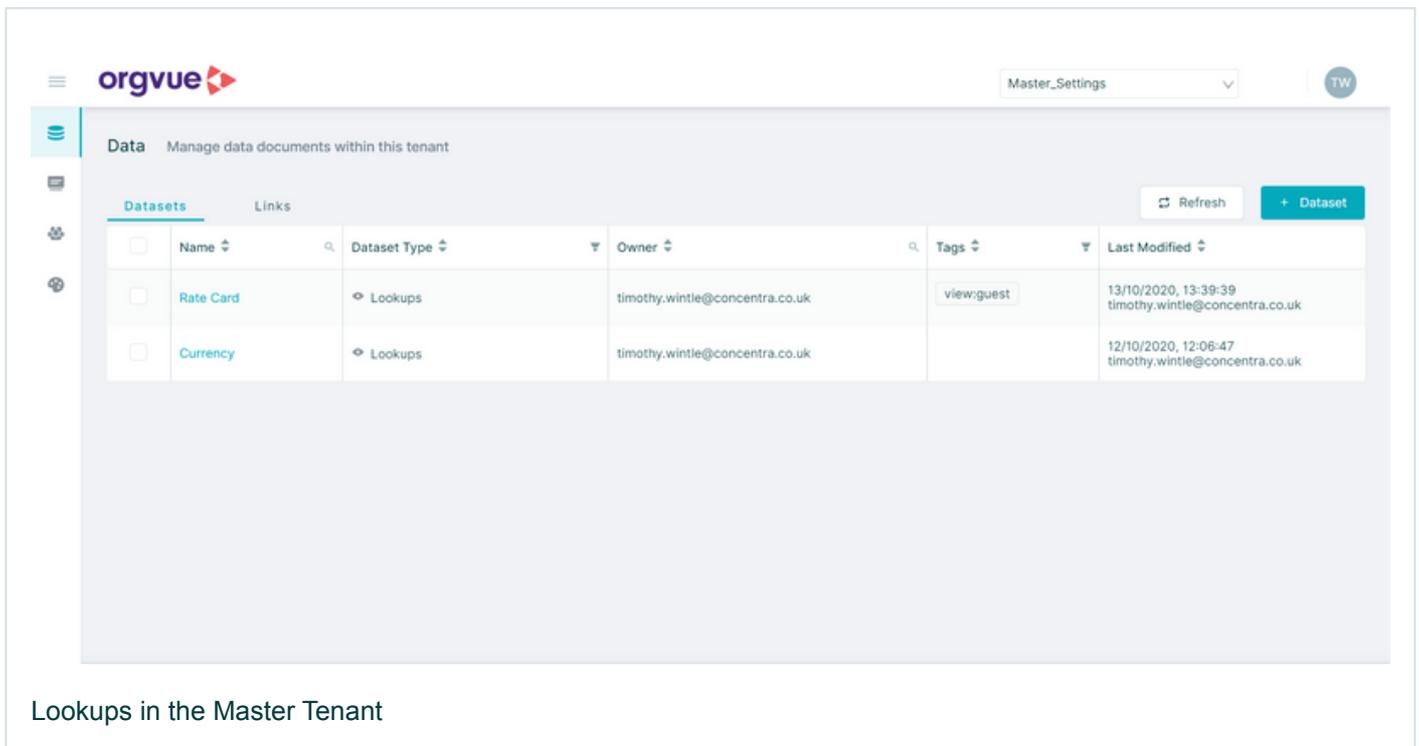
Creating a lookup: For a dataset to be available as a lookup in a sub-tenant users must do one of the following

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.
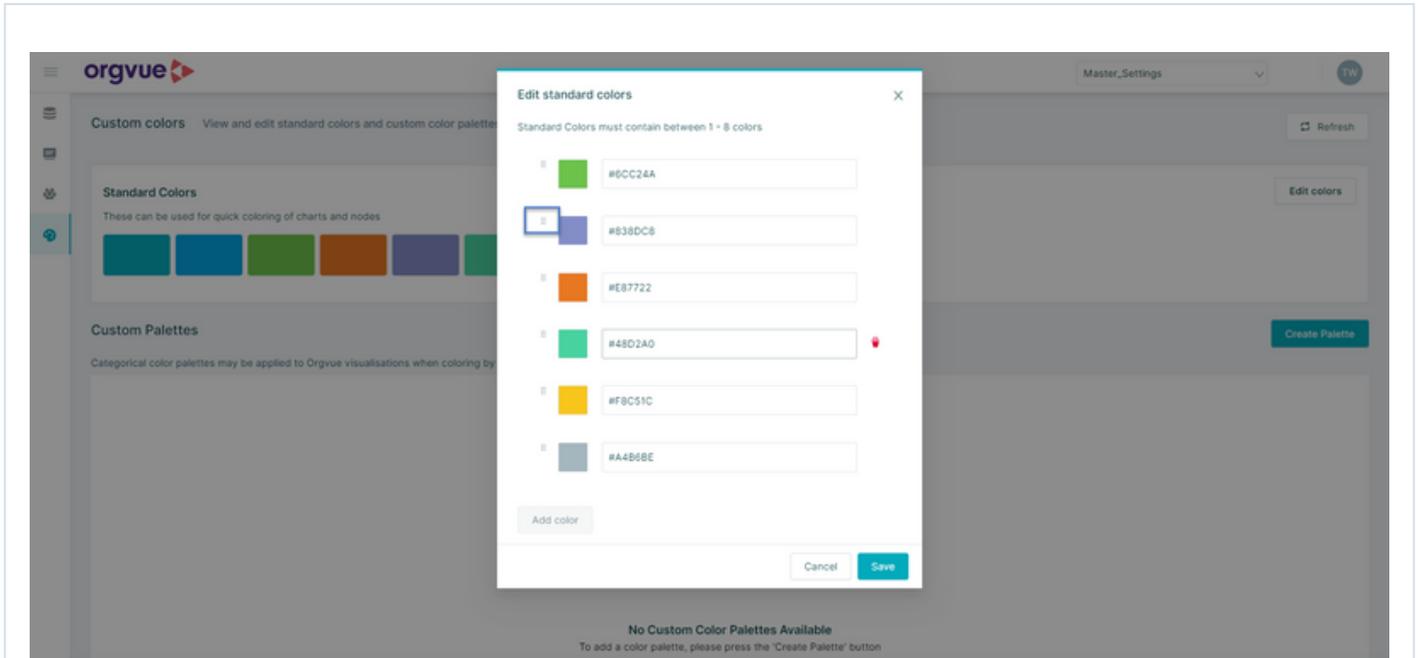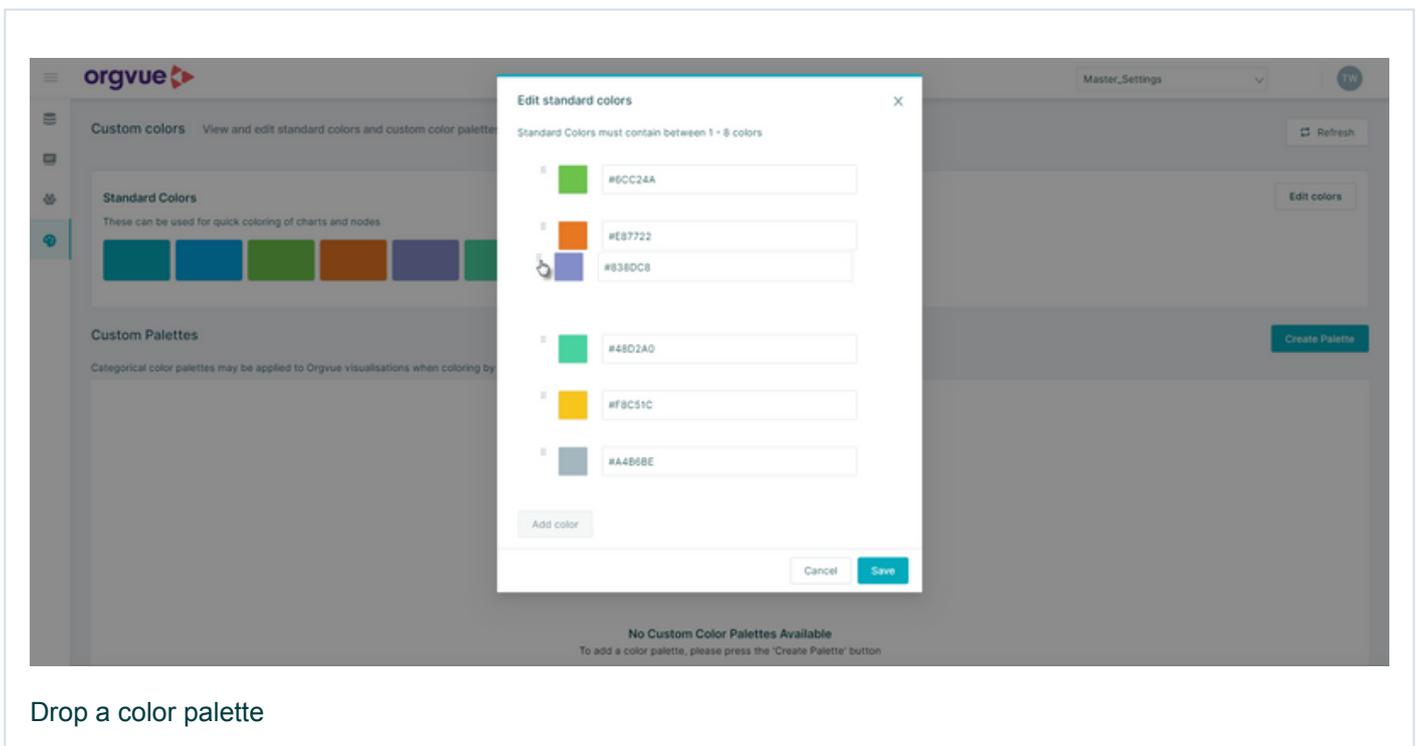

Lookups in the Master Tenant

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