



# release notes

workspace version 3.12

# orgvue workspace 3.12 release notes

November 09, 2020

## Introduction and summary

We are pleased to announce the latest release of orgvue (version 3.12)

In response to feedback from our users, we have incorporated several improvements to the flexibility of the platform and the user experience, which include the following:

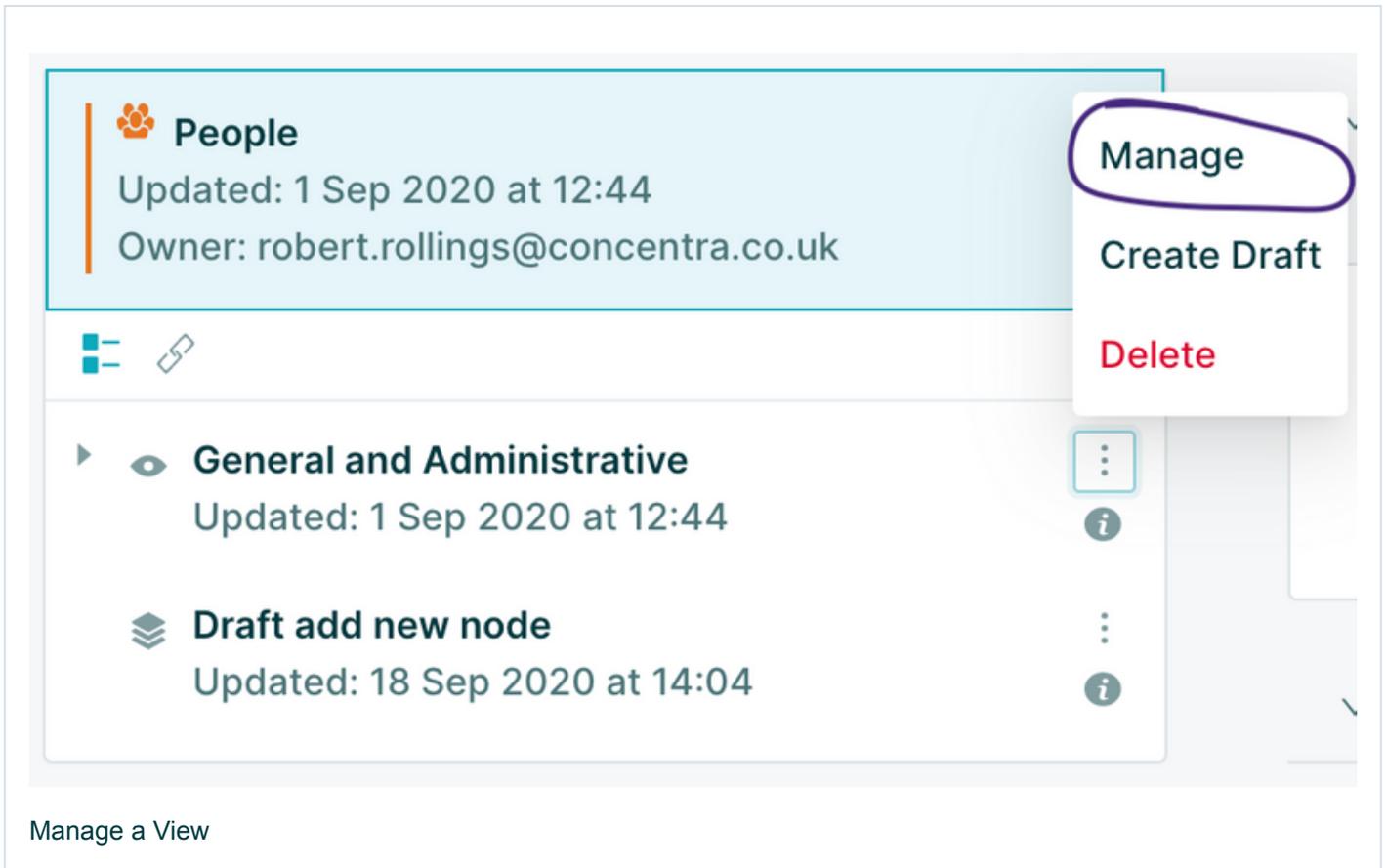
### The key updates to orgvue in 3.12:

1. **Share your Views and Drafts with colleagues** : You can now add and remove access to Views and Drafts for users. You can also change the Properties they can access after a Draft or View has been created. This will make managing security for transformations across large teams much easier.
2. **Add new Drafts**: You can now add new Drafts to Datasets and Views directly from the Homescreen, which accelerates and simplifies the process. You can also set permissions at the same time which lets you share a Draft from the moment you create it.
3. **Export data**: You can now export data from Datasets, Views and Drafts directly from Workspace. This means you can take data out of orgvue to upload it into your HR or other systems.
4. **Simplified Save process**: You can now save changes to Data via the Data menu and changes made to Packs (your visualizations) can be saved via the Pack menu.
5. **Ghost nodes**: When you filter a View, positions (Nodes) that are not included can cause your organization hierarchies to break down. You can now preserve these hierarchies by using “ghost Nodes,”. For example, previously, if a View was created based on the field Department = Finance and there was a matrix reporting structure, the central CFO organization could appear as one hierarchy and the regional Finance positions appear to be disconnected. With ghost Nodes this can now appear all as one hierarchy reporting to the CEO.
6. **Expression lookups**: You can now create a drop-down menu on Properties by using expressions in orgvue. For example, you may wish to restrict the city that can be selected to London, Paris or New York.
7. **Gizmo improvements**: we have added new functionality to Gizmo to bring you new analytical capabilities in orgvue

# 1. Share your Views and Drafts with colleagues

## Managing Views

Clicking on the  symbol on a View card and select "Manage". This will re-open the View Wizard



This will enable you to:

1. Change the View details
2. Update the View permissions
3. Alter the filter applied to the Nodes in the View

## Manage View



### People

Updated: 1 Sep 2020 at 12:44

Owner: robert.rollings@concentra.co.uk



### General and Administrative

Owner: robert.rollings@concentra.co.uk

1



### View details

Name, tag and add a description to the View to help people identify it on the homescreen.

2



### View permissions

Who can see the View and what properties do you want to be displayed within it?

3



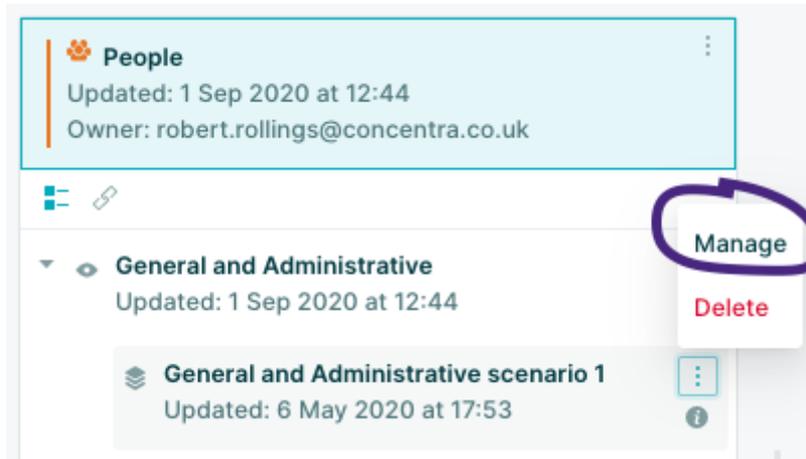
### Filter the Nodes

Select what data is shown in the View based on property buckets. This will slice the Dataset horizontally, only surfacing the data associated with the selected buckets.

Manage View options

## Managing Drafts

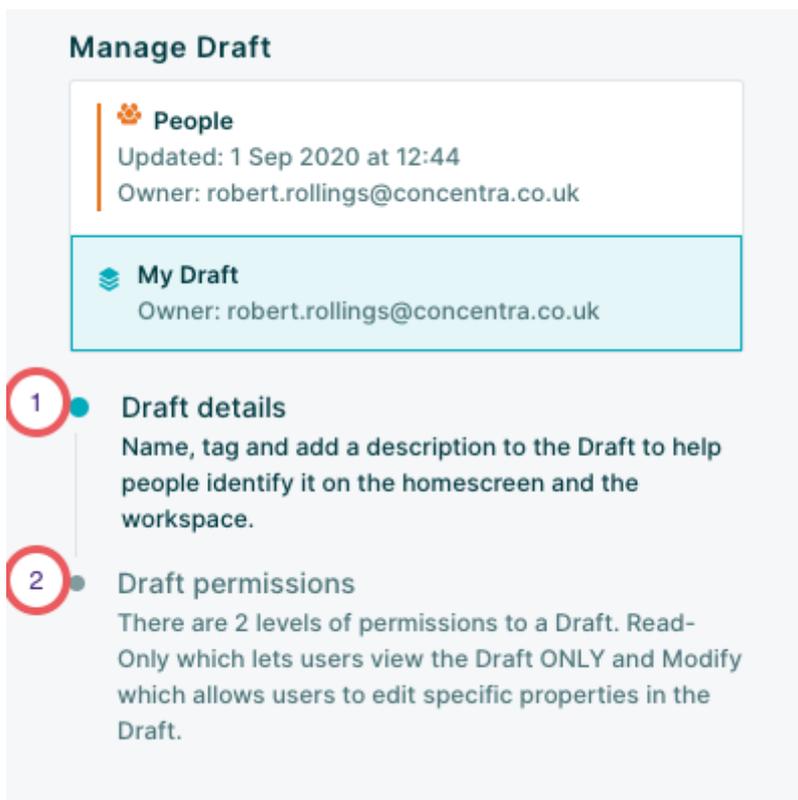
Clicking on the  symbol on a Draft card and select "Manage". This will re-open the Draft Wizard



Manage a Draft

This will enable you to:

1. Change the Draft details
2. Update the Draft permissions

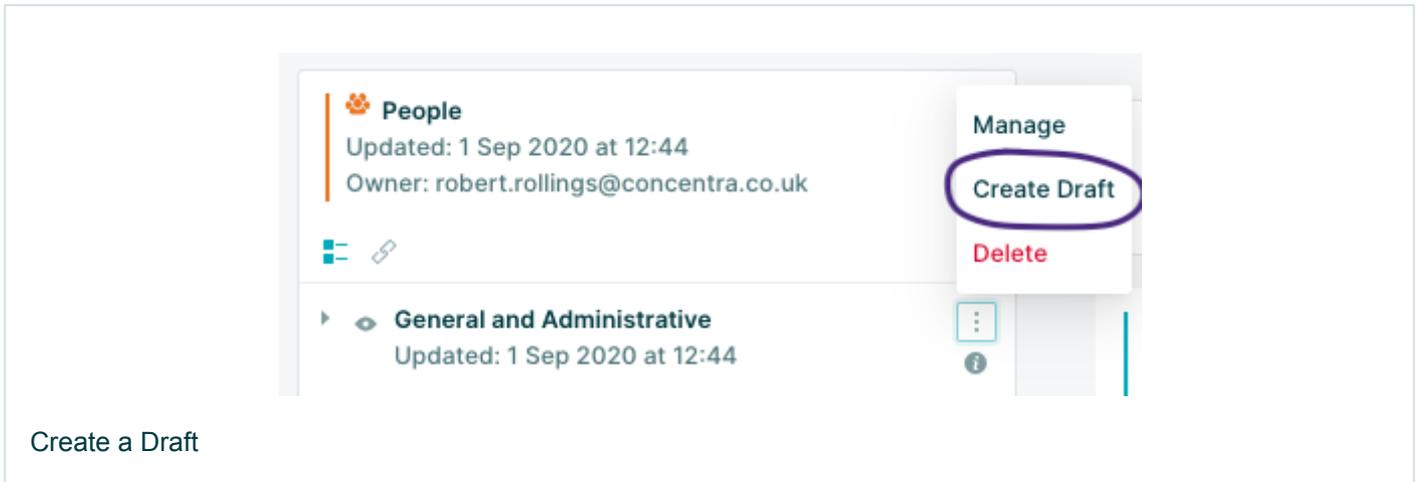


Manage Draft options

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## 2. Adding new Drafts

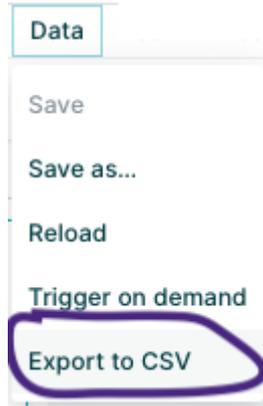
Clicking on the  symbol on a Dataset or View card will give you the option to create a new Draft



### 3. Export data

You can now export data directly from Workspace to a CSV file which you can open outside of orgvue (for example in Microsoft Excel).

To export data navigate to the the "*Data menu*" in the top menu bar and select "*Export to CSV*"

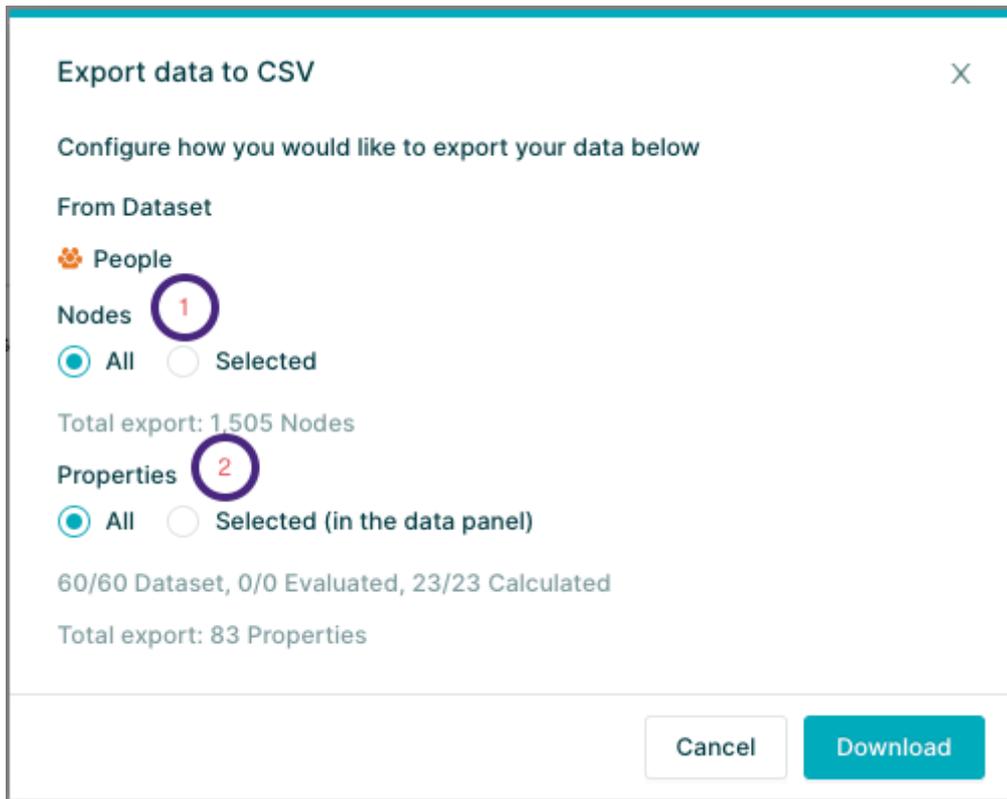


Export to CSV in Data menu

The export options window will then open and you can configure your export.

You have two choices to make:

1. Do you want to include all the Nodes in your Dataset or just those which are currently selected? The count of selected Nodes can be seen in the footer and the specific nodes can be reviewed in the data panel
2. Do you want to include all available Properties in your export or just those selected in the data panel?



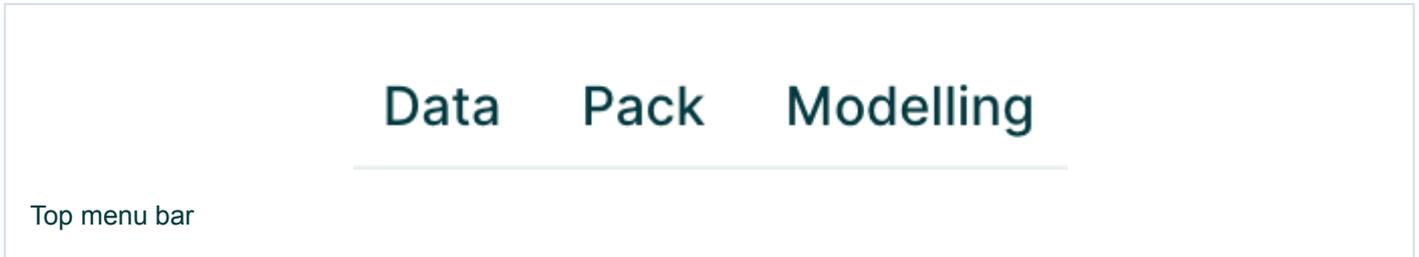
Export to CSV options

NOTE: dates are exported in ISO (International Organization for Standardization) format `YYYY-MM-DD` so 22nd October 2020 would export as `2020-10-22`

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## 4. Simplified Save process

The top menu has been updated with new options to better help you find the functionality you need and to simplify the save process



Top menu bar

### Data menu

The data menu now includes options to Save, Save as and Reload the Data. You can now also trigger on-demand expressions or export the data to CSV.

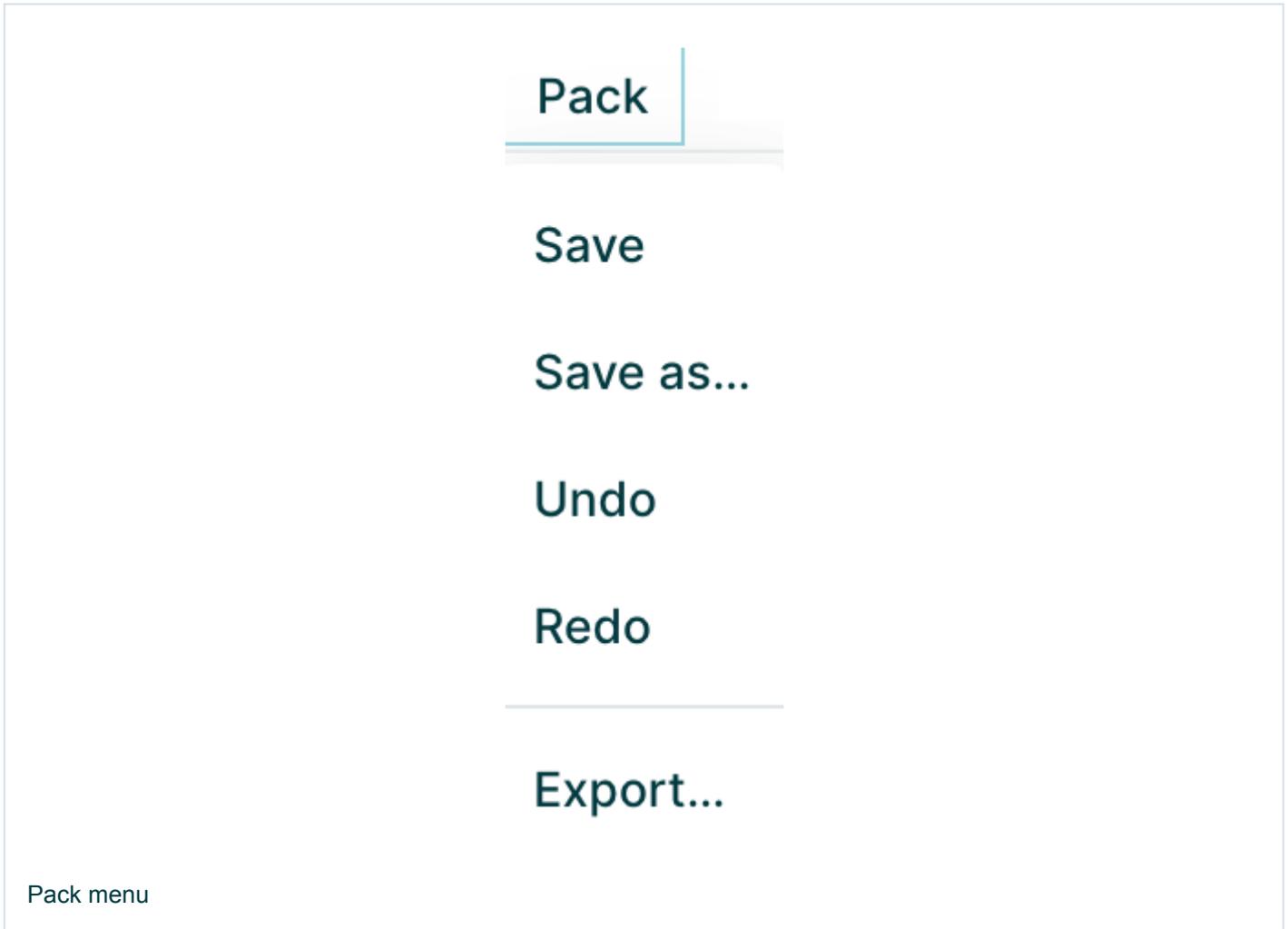
NOTE: To save changes to your Dataset or Draft you must use the Data -> Save or "Data" -> "Save as..." options in the Data menu



Data menu

### Pack menu

The Pack menu includes options to "Save" and "Save as" the pack and now includes "Undo" and "Redo" Pack configuration changes and also "Export" the pack to Microsoft PowerPoint



NOTE: To save changes to your Pack you must use the "*Pack*" -> "*Save*" or "*Pack*" -> "*Save as...*" options in the Pack menu. If you choose to create a new Pack when opening a Dataset, View or Draft from the Homescreen you must "*Save as*" the new Pack.

NOTE: The modeling menu is unchanged

## Returning to the Homescreen

When you choose to return to the Homescreen and Data and/or Pack changes have not been saved we now provide a summary of those changes and give you the choice to go back into your Pack and save changes or discard the changes and return to the Homescreen

### Unsaved Changes X

Your workspace contains unsaved changes. How would you like to proceed?

Datasets	Changed	Deleted	Last modified
People	3	1	1 Sep 2020, at 12:44

---

Pack	New slides	Last modified
Overview of People	1	22 Oct 2020, at 13:34 by

Don't saveReturn to workspace

[Return to Homescreen](#)

NOTE: if you close your browser tab you will receive a warning if there are unsaved changes to the Pack or Data

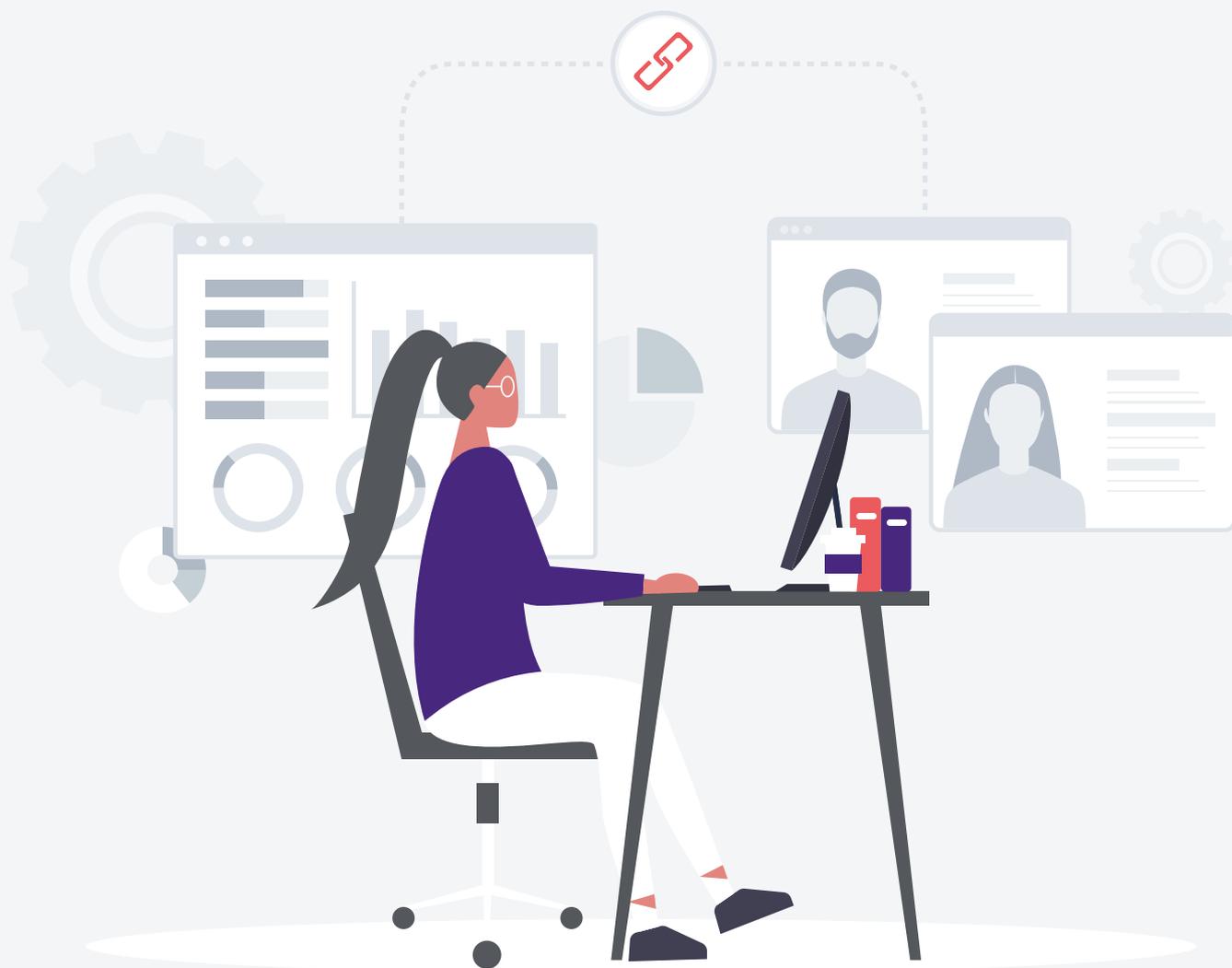


**Leave site?**  
Changes that you made may not be saved.

CancelLeave

Close tab warning

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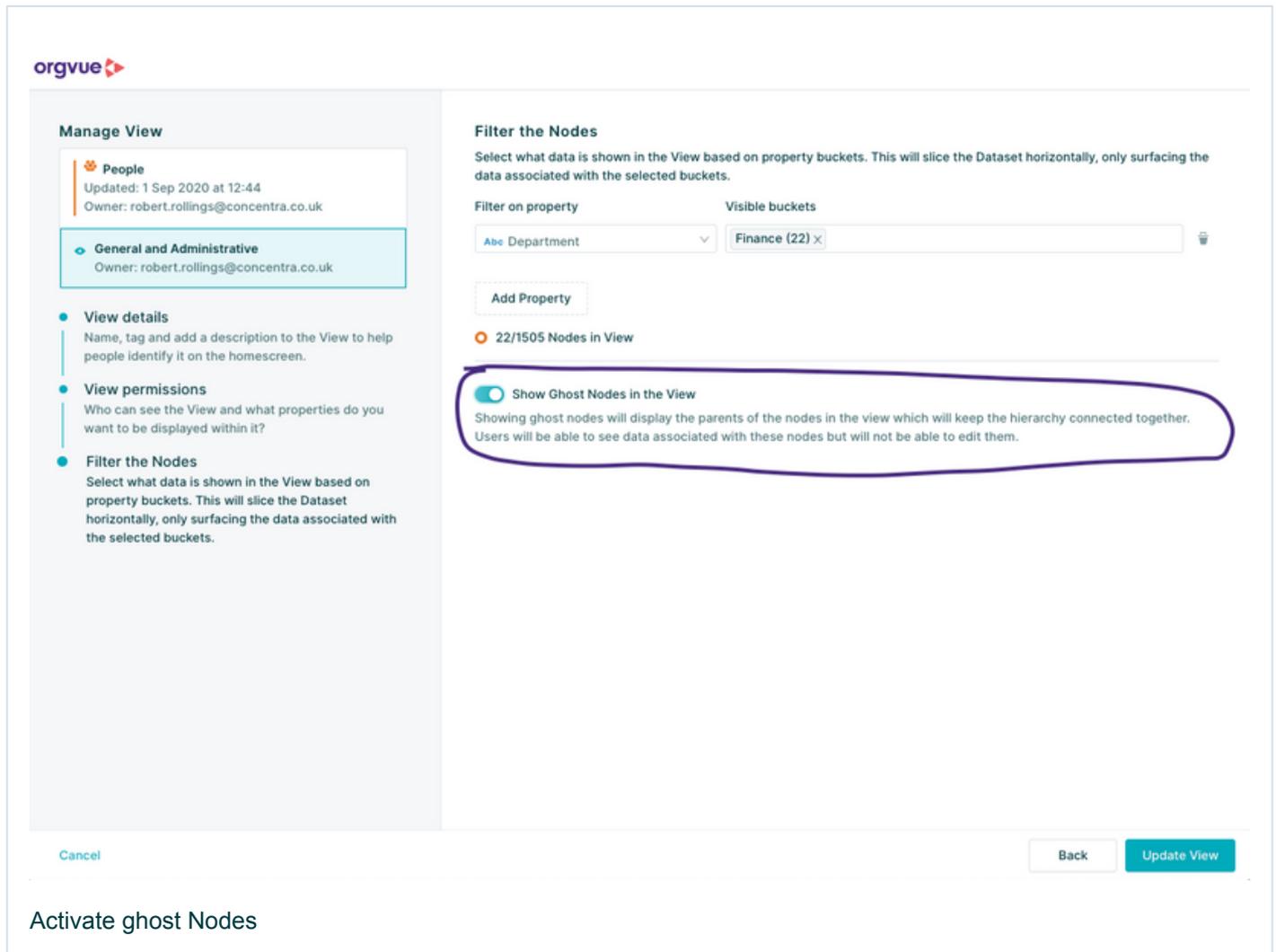
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## 5. Ghost nodes

A View allows you to share a filtered set of nodes with a user or group of users. When this filter cuts across the organizational hierarchy then the user will see orphans or groups of orphan Nodes in their View.

When a view has ghost nodes enabled then the hierarchy will remain connected together via the common ancestors of the Nodes in the View



The screenshot shows the 'orgvue' interface for managing a view. On the left, under 'Manage View', there are sections for 'People' (updated 1 Sep 2020 at 12:44, owner: robert.rollings@concentra.co.uk) and 'General and Administrative' (owner: robert.rollings@concentra.co.uk). Below these are three bullet points: 'View details', 'View permissions', and 'Filter the Nodes'. The 'Filter the Nodes' section is selected. On the right, the 'Filter the Nodes' section is active, showing instructions: 'Select what data is shown in the View based on property buckets. This will slice the Dataset horizontally, only surfacing the data associated with the selected buckets.' It includes a 'Filter on property' dropdown set to 'Abe Department' and a 'Visible buckets' field containing 'Finance (22)'. Below this is an 'Add Property' button and a status indicator '22/1505 Nodes in View'. A purple oval highlights the 'Show Ghost Nodes in the View' toggle, which is currently turned on. Below the toggle is the text: 'Showing ghost nodes will display the parents of the nodes in the view which will keep the hierarchy connected together. Users will be able to see data associated with these nodes but will not be able to edit them.' At the bottom of the interface are 'Cancel', 'Back', and 'Update View' buttons.

### Activate ghost Nodes

NOTE: For ghost nodes to work the `parent_ID` property must have the tag `index`. This can be added to the dataset in settings. `id`, `parent_id` and `label` of the ghost nodes are the only Properties that will be visible to users in the View

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## 6. Expression lookups

An expression lookup allows you to define what options are available to update the property value. For example you may want to limit the locations available to select from to "London", "New York" and "Paris".

To set up an expression lookup go to the Property Manager for your Dataset in Settings and edit the property you want to enable the lookup on.

Select "Lookups" from the edit menu and then select "Lookup Type:" "Expression"

The lookup expression must be entered in the format below with the options inside square brackets ( `[]` ) with each option in quotation marks ( `"` ) and separated by a comma ( `,` ).

So for the example of "London", "New York" and "Paris" this would be:

```
["London", "New York", "Paris"]
```

### Adding new property: **Location**

General

Expressions

Lookups

Lookup Type :

Expression

Lookup Expression :

["London","New York","Paris"]

Restrict to lookup :



Close

Save

Expression Lookup

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## 7. New Gizmo Functions and Improvements

We have made the following enhancements to Gizmo:

1. Simplified lookup Syntax
2. `isEq()`
3. `is`
4. `case`
5. `guard`
6. `round(), ceil(), floor(), trunc()`
7. `testSetValue`

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### Simplified lookup syntax

The syntax for calling Dataset Lookups has been altered to allow future improvements to orgvue.

In previous versions of orgvue a dataset lookup could be called using dot ( `.` ) notation so:

```
node.datasetProperty.LookupProperty;
```

The dot ( `.` ) is no longer required and must now be removed for dataset lookups to work. So the above example needs to be rewritten as:

```
node.datasetPropertyLookupProperty;
```

You can find further information on lookups and their uses in [the Gizmo Cookbook](#)

`isEq`

A new and simpler way to test for equality in Gizmo.

For more information on `isEq` and how to use it see [the Gizmo Cookbook](#)

`is`

Closely related to `isEq()` above, `is` implements a rich library of functions for composing predicates (a function that returns true or false) for use in filters, case statements and other conditional logic.

To learn more about `is` and how to use it see [the Gizmo Cookbook](#)

`case`

`case` is a new Gizmo function that allows you to write complex conditional logic in a way which is easier to read, write, debug and explain than long complex nested if statements.

To learn more about `case` and how to use it see [the Gizmo Cookbook](#)

## `guard`

`guard` is closely related to `case` and they will often be used in combination. Whilst `case` maps over a collection, `guard` operates on the collection itself.

This is an advanced technique using conditional chaining and nullish coalescing, features of ES2020.

To learn more about `guard` and how to use it see [the Gizmo Cookbook](#)

## `round()`, `ceil()`, `floor()`, `trunc()`

When working with numbers, and particularly with currencies, it is common to want to be able to express a number to a fixed precision.

The methods `round()` , `ceil()` , `floor()` and `trunc()` are provided for this purpose:

To learn more about these functions and how to use them see [the Gizmo Cookbook](#)

## `testSetValue`

When authoring `setValue` expressions, it is helpful to be able to test them without actually applying the expression.

`testSetValue` is provided for this purpose:

To learn more about `testSetValue` and how to use it see [the Gizmo Cookbook](#)