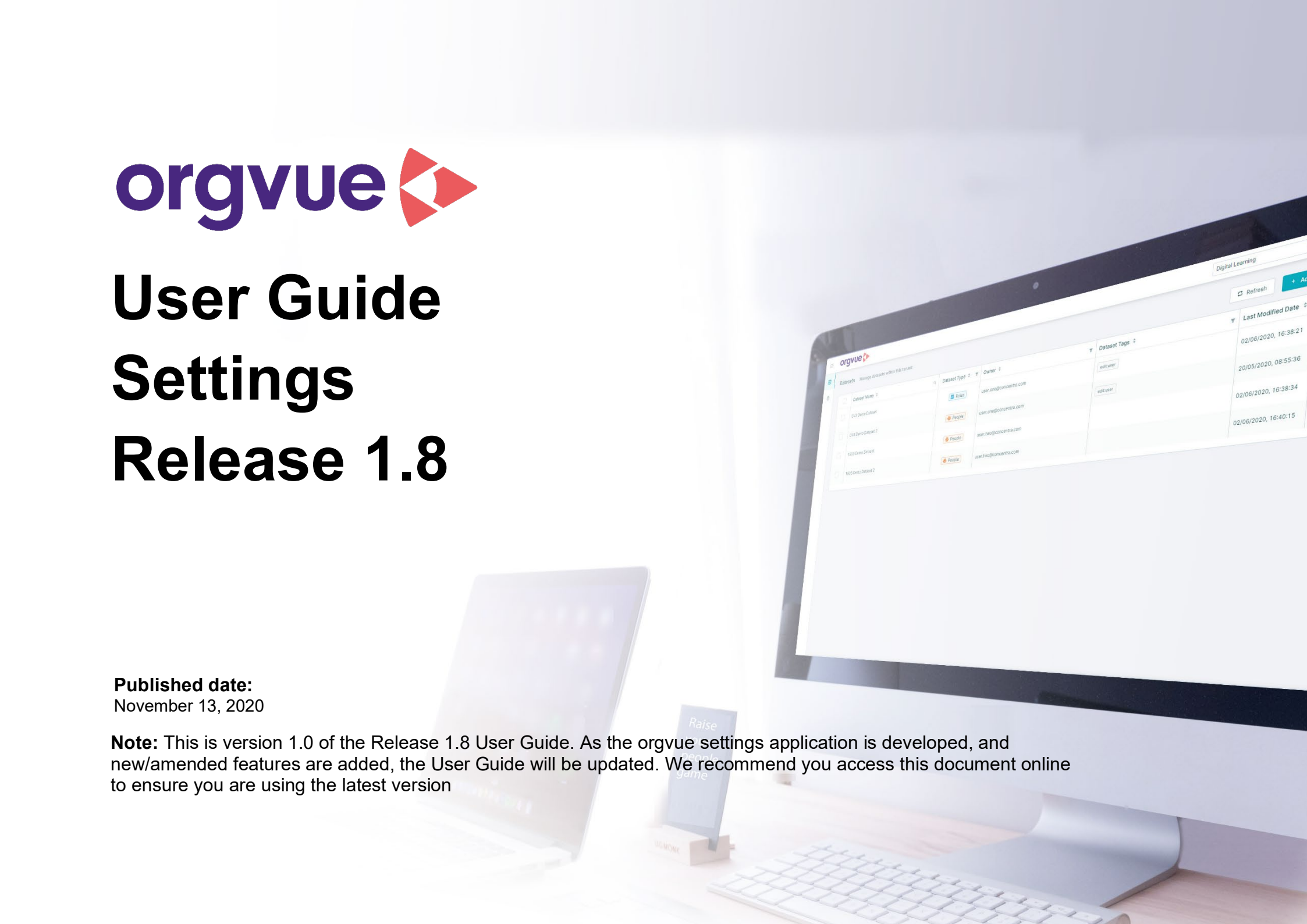
User Guide
Settings
Release 1.8



Published date:
November 13, 2020

Note: This is version 1.0 of the Release 1.8 User Guide. As the orgvue settings application is developed, and new/amended features are added, the User Guide will be updated. We recommend you access this document online to ensure you are using the latest version

Navigating this User Guide

There are three ways you can navigate this User Guide You can:

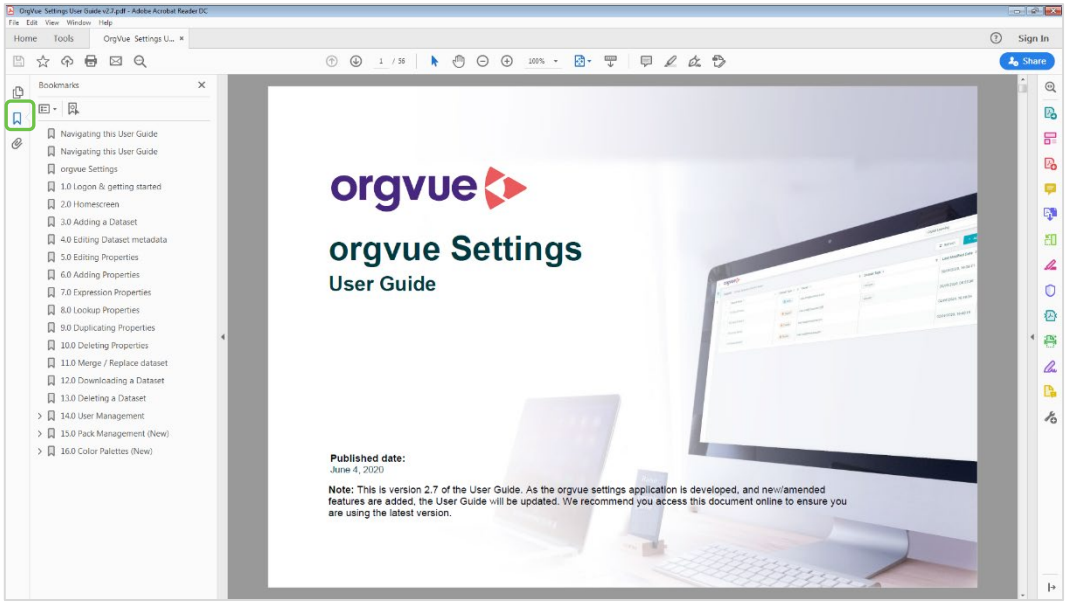
1. use the navigation pane in the User Guide PDF document that appears on the left-hand slide of the User Guide PDF
2. use the Contents section on page 4. You can navigate back to the Contents section at any time by clicking on the icon in the top right corner of each page
3. use the Search function in the User Guide PDF toolbar

To see all the navigation options, you need to download the User Guide and open it with your Adobe PDF Reader. Viewing the User Guide in a Browser, e.g. Chrome, will limit your navigation options

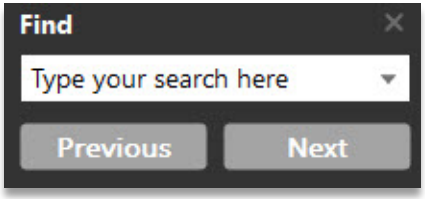
Note: some sections have links embedded to allow you to quickly navigate to follow up content on that section. These links look like this:
[link to another section] Click on the link to go to the section

The zoomed-in image of a key feature is highlighted with a blue rectangle to show where it is located on the screen

If you can't see the navigation pane, click on this icon to bring it up



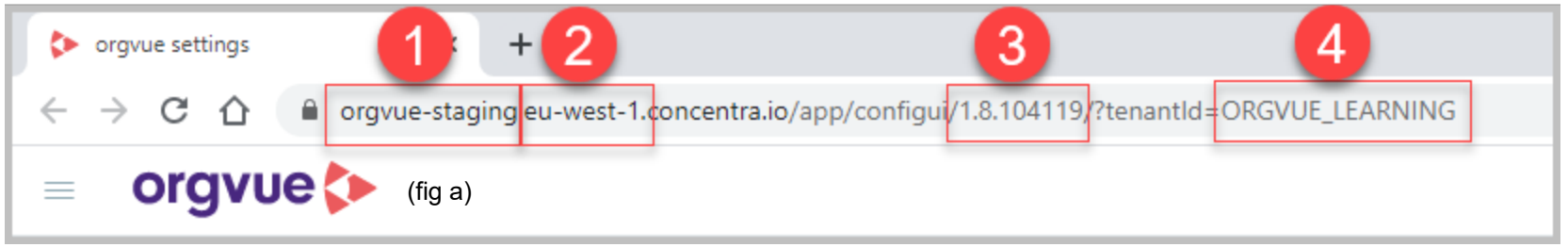
You can also use the search function in the PDF toolbar to search for topics



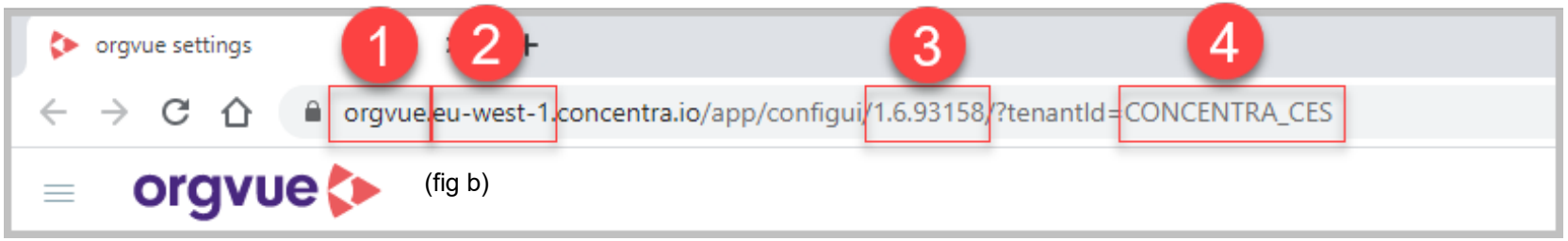
Settings release number

This user guide details functionality found in release number 1.8 of orgvue settings
The current **Release Number** can be identified from the browser address bar along with details of the **Environment**, **Region** and **Tenant**

1. **Environment:** orgvue-staging (fig a) or production (fig b)
2. **Region:** Europe, USA or Asia
3. **Release & Update:** e.g. 1.8.104119 = update 104119 of release 1.8
4. **Tenant: Tenant ID**



(fig a)



(fig b)

orgvue Settings

The orgvue Settings is a standalone interface to enable management of an orgvue tenant

The following administration processes are conducted within the orgvue Settings interface

- Adding a dataset
- Adding / editing /deleting dataset tags to control permissions
- Changing dataset type (people, roles, processes etc.)
- Editing properties within datasets including property types and number formats and bins for measures
- Adding properties
- Managing expression and lookup properties
- Merge / Replace data in dataset
- Deleting properties
- Download dataset
- Delete dataset
- Add / delete user
- Bulk user management
- Amend user
- Manage pack permissions
- Color palette management
- Create, upload, manage and edit links datasets
- Paste merge links dataset

This User Guide takes you through the functions available and also covers the steps for each of the processes

Note: orgvue 3 is designed to work on the latest version of the Google Chrome browser. If you are using an older version of Chrome, you may experience performance issues. Access to orgvue 3 Settings is blocked from Firefox, Internet Explorer, Microsoft Edge and other browsers

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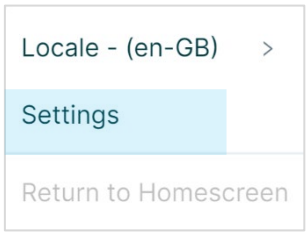
1.0 Logon & getting started

Access to the settings logon screen is gained from the orgvue homescreen

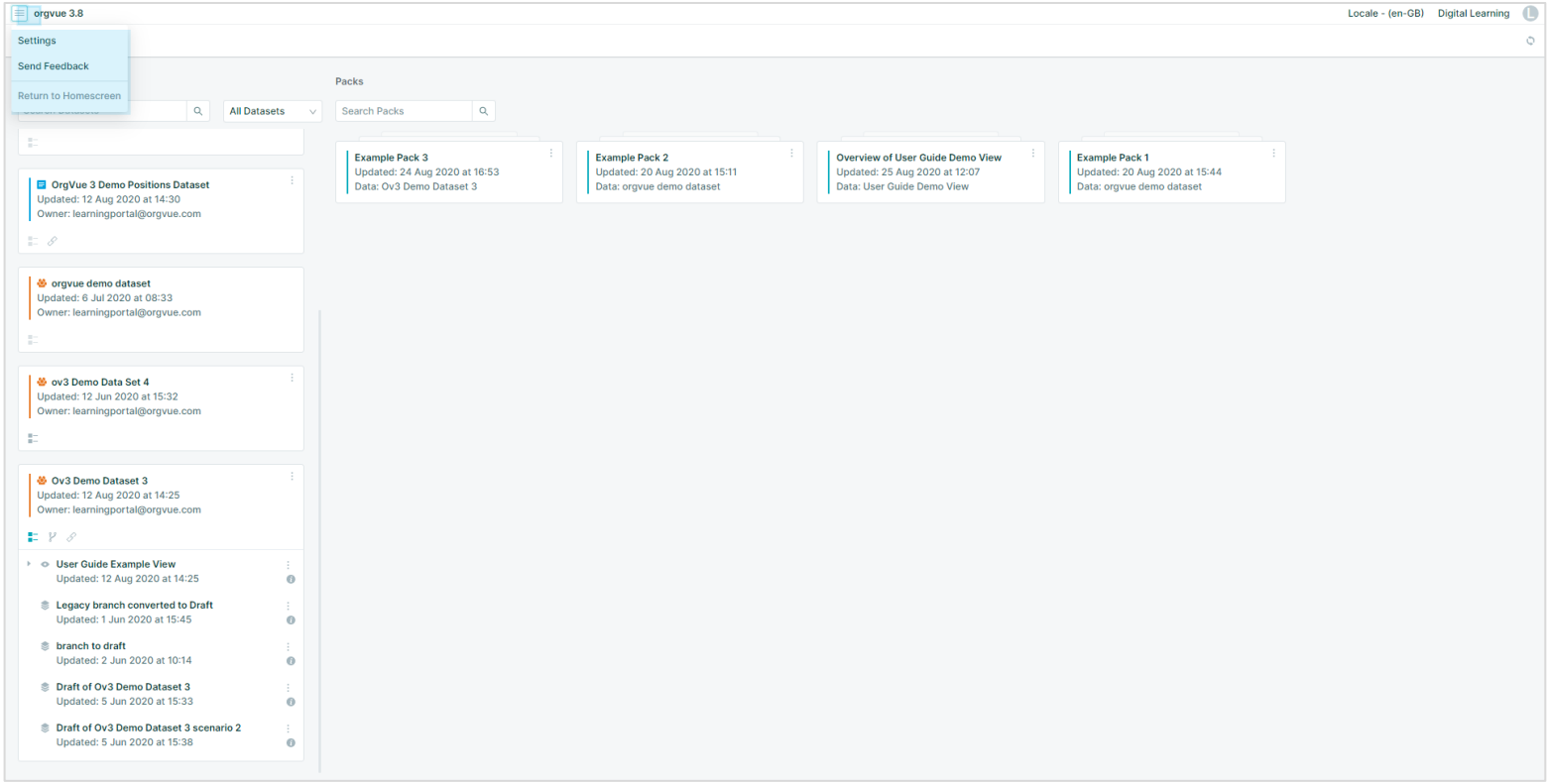
From the menu button (fig a) on the header it is possible to access the settings menu option (fig b)

Selecting this option, will open a new tab in your browser with a log in screen as shown on the next page

(fig a)



(fig b)



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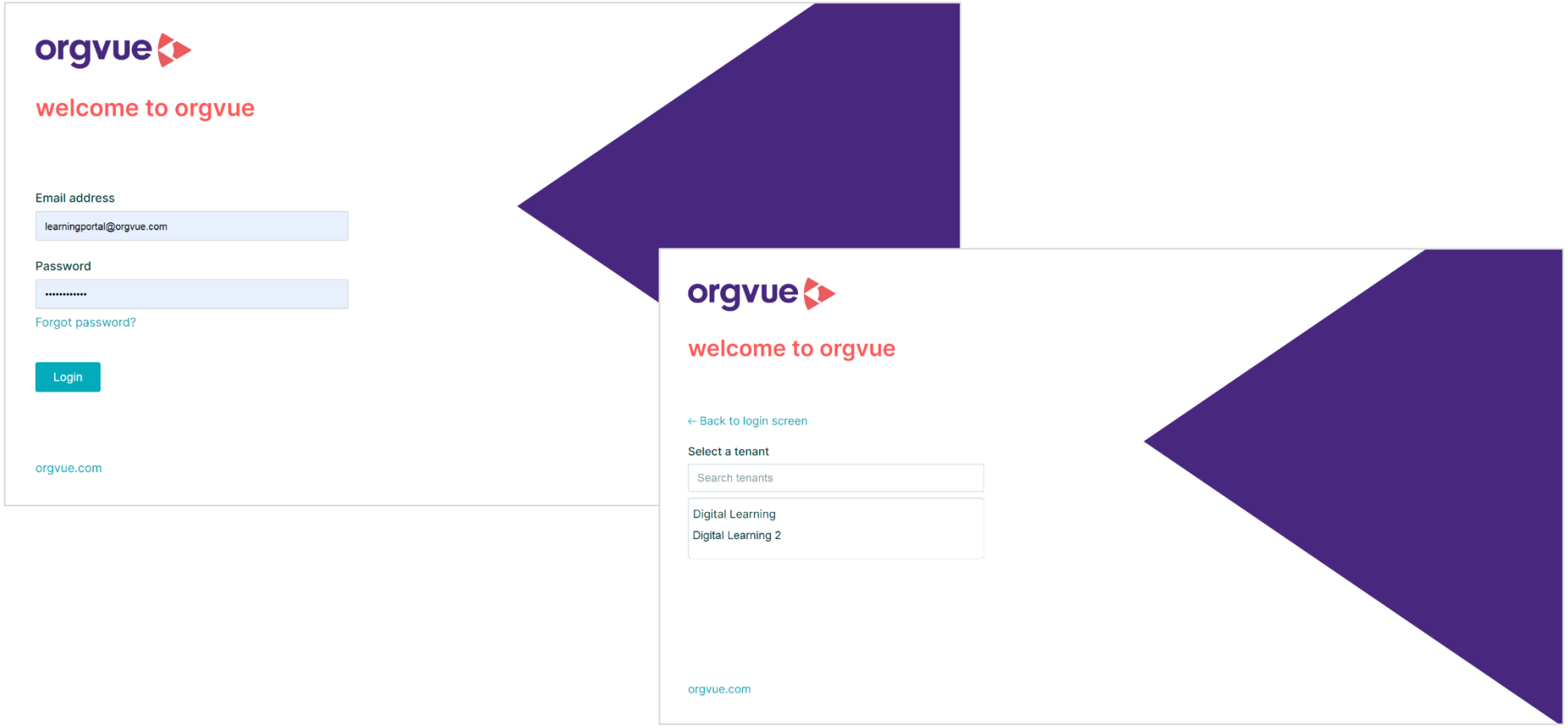
1.0 Logon & getting started *continued*

Your orgvue logon ID and password will also provide access to the settings interface
The first step after entering your ID and password is to select the required tenant from the list
If you only have access to a single tenant, you will be presented with the homescreen as soon as you enter your ID and password



2.0 Homescreen

Once you have logged on and selected a tenant, the home screen (fig a) displays a list of the **Datasets** available to you as the default view and is indicated by the dataset icon highlighted in teal (fig c)

Available datasets will be based on permissions for user role. The Users dataset, pack management screen and color palettes screen can be accessed by selecting the icons on the side menu bar (fig c)

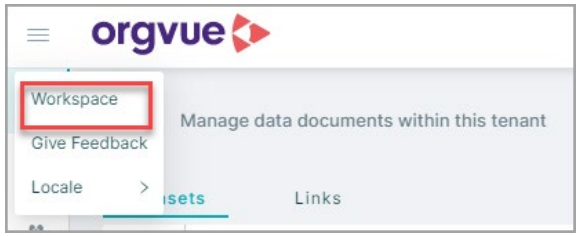
To be able to edit a dataset, you must either be the owner, have the role of admin, or the dataset must be tagged with an edit tag e.g. **edit:user** This will enable any logon with the role of user to edit the dataset

To add a dataset click the **+Add Dataset** button to start the process (fig b)

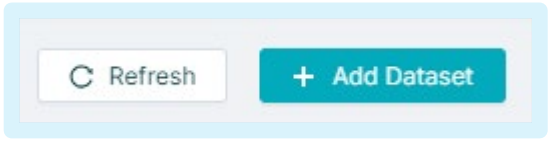
The **Refresh** button simply refreshes the view of the available datasets with updated details (fig b)

From the menu button in the top left (fig d) it is possible to navigate back to the latest version of **Workspace** and this will open in a new tab in your browser

(fig d)

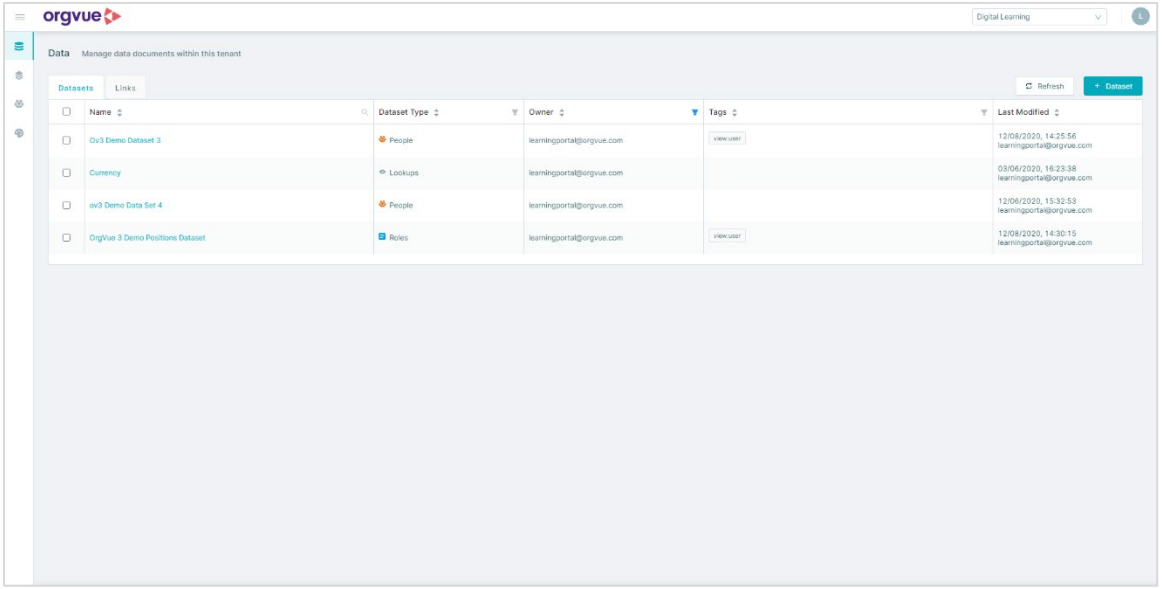


(fig b)



(fig c)

(fig a)

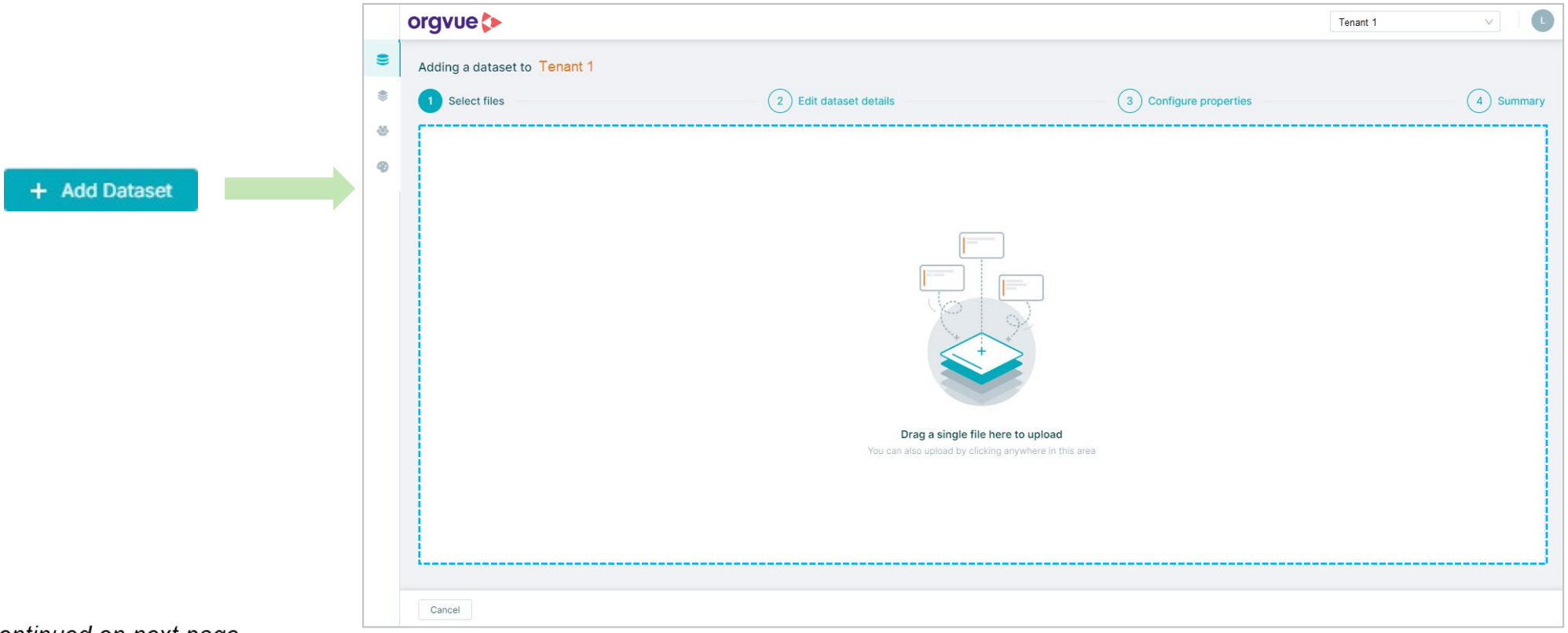


3.0 Adding a Dataset

After clicking the **Add Dataset** button you will be presented with a screen to select files

The blue dotted line indicates the upload area

Click anywhere within this area to open a file selection window or drag your file onto the upload area



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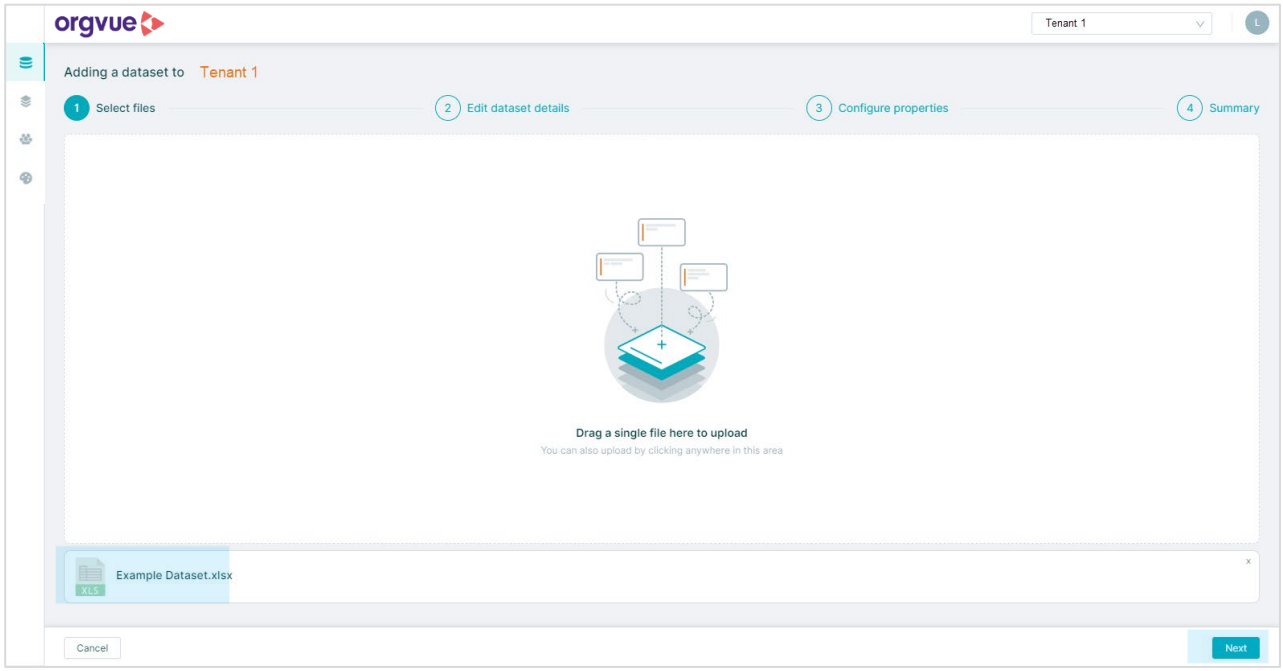
3.0 Adding a Dataset *Continued*

Once selected, the file will be displayed at the bottom of the screen

Click the **Next** button to progress to step 2



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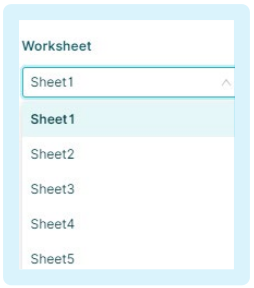
3.0 Adding a Dataset *Continued*

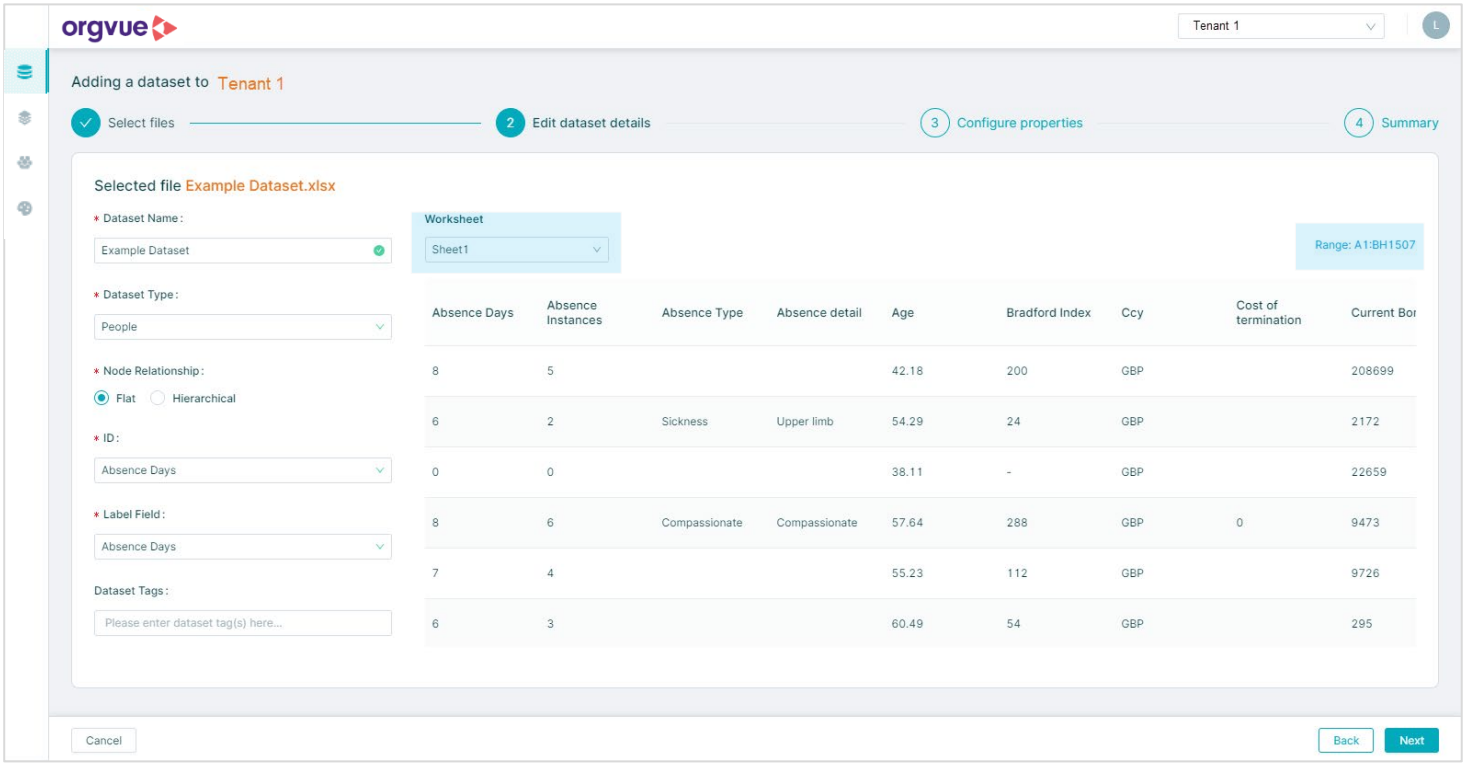
The selected file will then be imported by the application and you then have the option to edit the dataset details

If your selected file has more than one sheet with data, you can use the worksheet selection dropdown to choose the required sheet (fig a)
Supported file formats: .xlsx, .json, xml, .xls, .ods, .csv, .dbf, .rtf

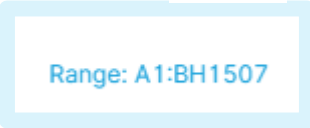
The selected datasheet cell range is also confirmed on screen (fig b)

(fig a)





(fig b)



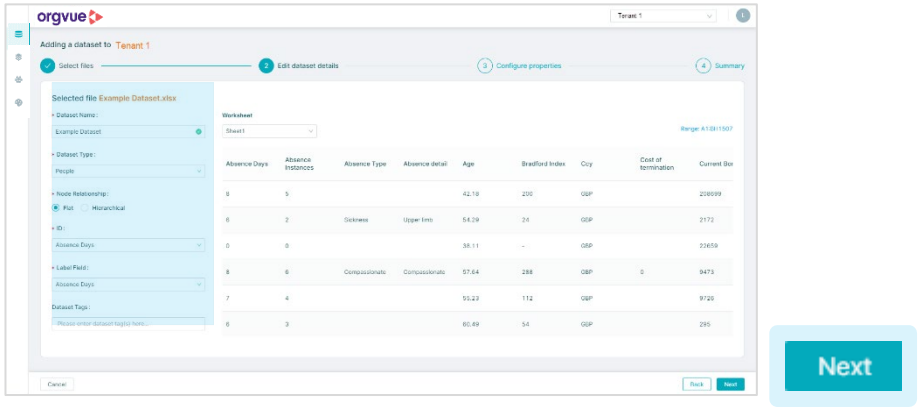
3.0 Adding a Dataset *Continued*

There are a number of options available on the **edit dataset** details screen, and the options available will depend on the node relationship selection (figs b & c)

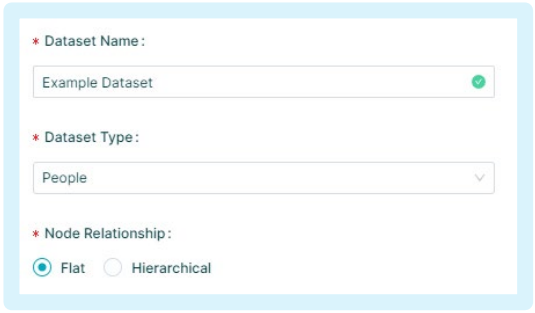
- *Dataset Name: Free text field to enter a name for your uploaded dataset. This will default to the file name of the selected uploaded file but can be overwritten
- *Dataset Type: Dropdown selection box for dataset type being uploaded
- *Node Relationship: Radio selection buttons to choose between Flat dataset and Hierarchical. Further options presented will depend on which radio button is selected
- *ID: Dropdown box to select data property in upload file containing unique identifier e.g. employee ID or position ID
- *Parent ID: Dropdown box to select data property upload file containing Parent identifier e.g. manager ID
- Label Field: Dropdown box to select data property to be used as Label field. This will default to first column in data upload until alternative is chosen
- Dataset Tags: Free text box to add any dataset tags to control access for other users. Tags are entered as comma separated values e.g. view:user, edit:hr

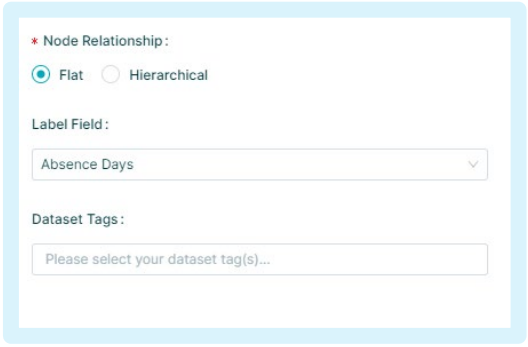
*Indicates mandatory field

Click next to progress to step 3

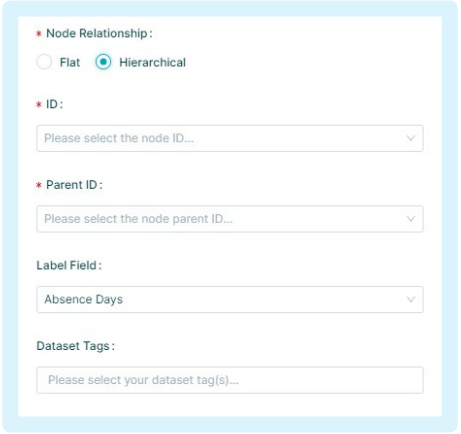


(fig a)





(fig b)



(fig c)

3.0 Adding a dataset

Continued

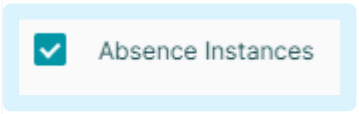
Use the check boxes on the left to unselect any properties not to be imported. By default, all properties will be initially checked (fig a)

orgvue will automatically apply a type to each property being imported but this can be changed using the dropdown selection box (fig b)

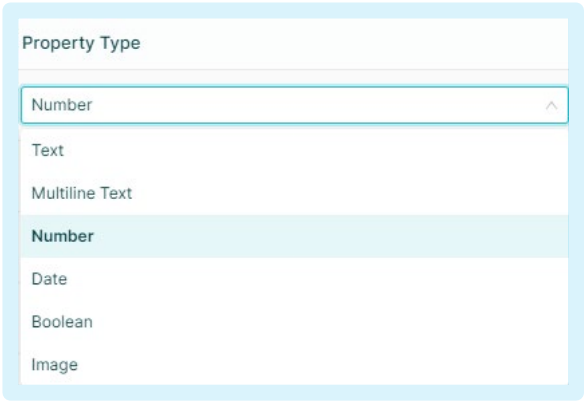
The number of properties selected for import is confirmed on screen (fig c)

Once all property types have been selected, the data can then be uploaded (fig d)

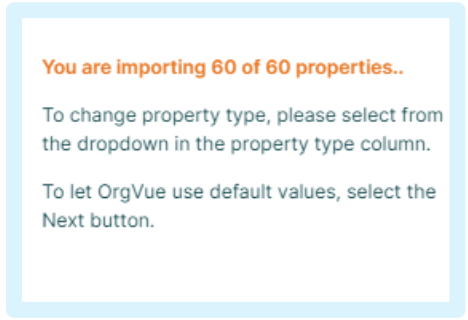
Important date formats: when uploading properties data as dates from **csv** files they must be entered in ISO format YYYY-MMM-DD or long date format, if uploading from **XLSX** then any Excel date format is acceptable



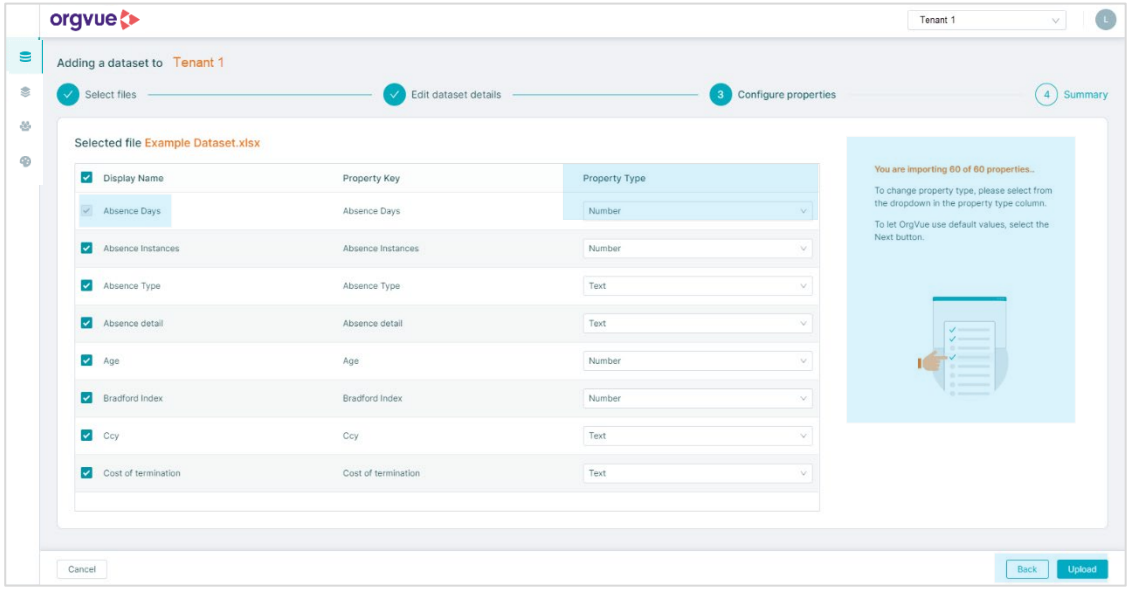
(fig a)



(fig b)



(fig c)



(fig d)

Continued on next page

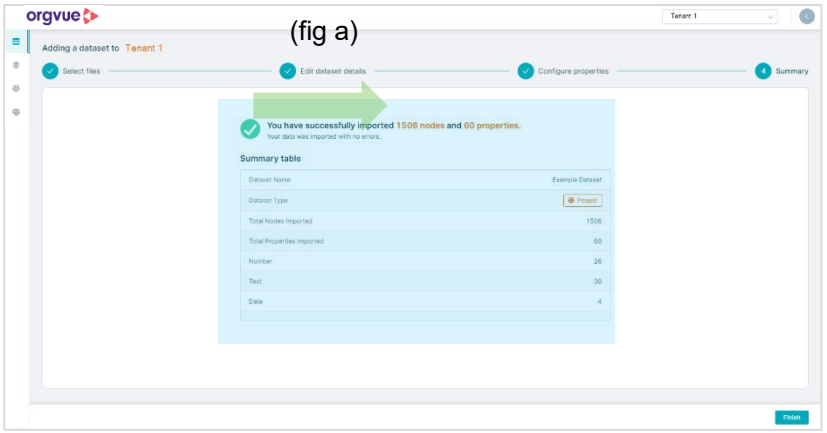
3.0 Adding a Dataset *Continued*

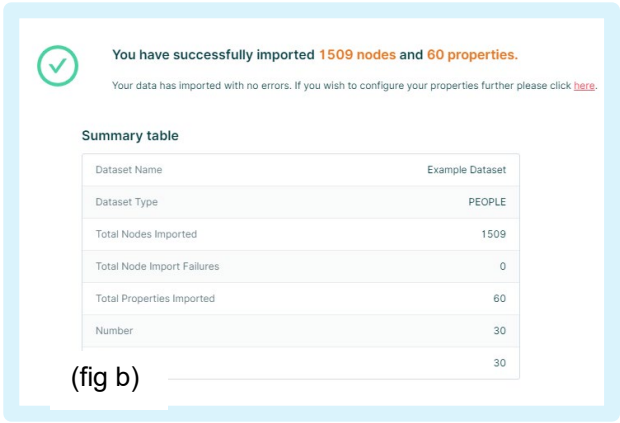
After uploading, a confirmation message will display a summary table with the following information:

- Dataset Name
- Dataset Type
- Total nodes imported
- Total nodes import failures
- Total Properties Imported
- No. Number Properties
- No. Text Properties

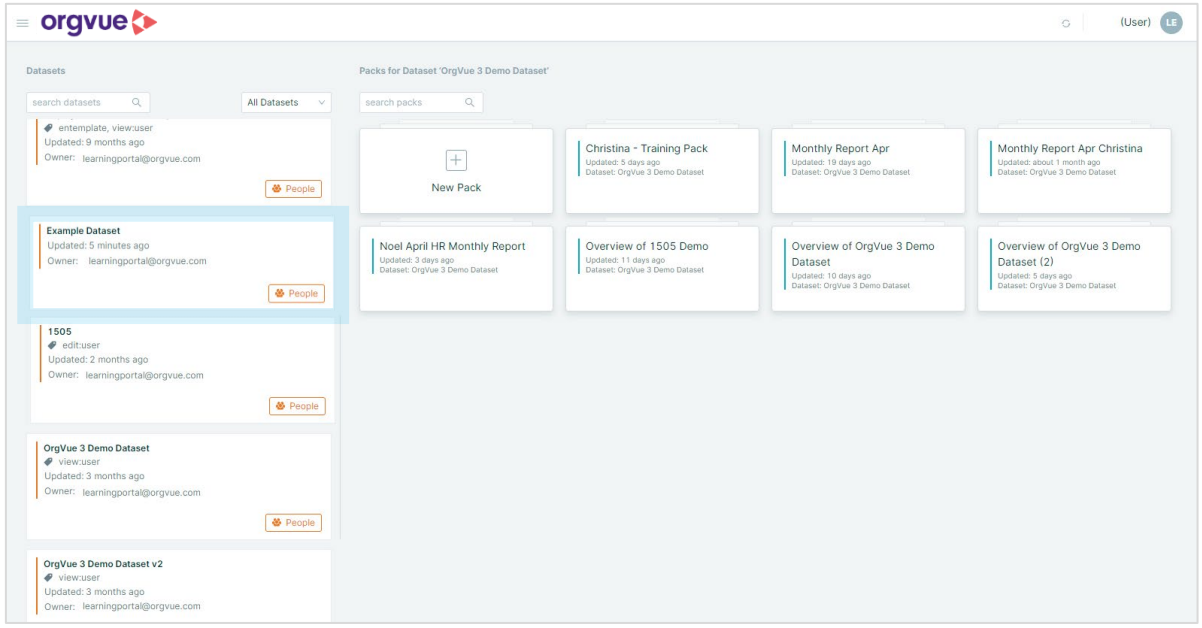
The dataset will now be available to use in orgvue 3 and the dataset will now appear in the list of datasets on the homescreen.

(fig a)





(fig b)



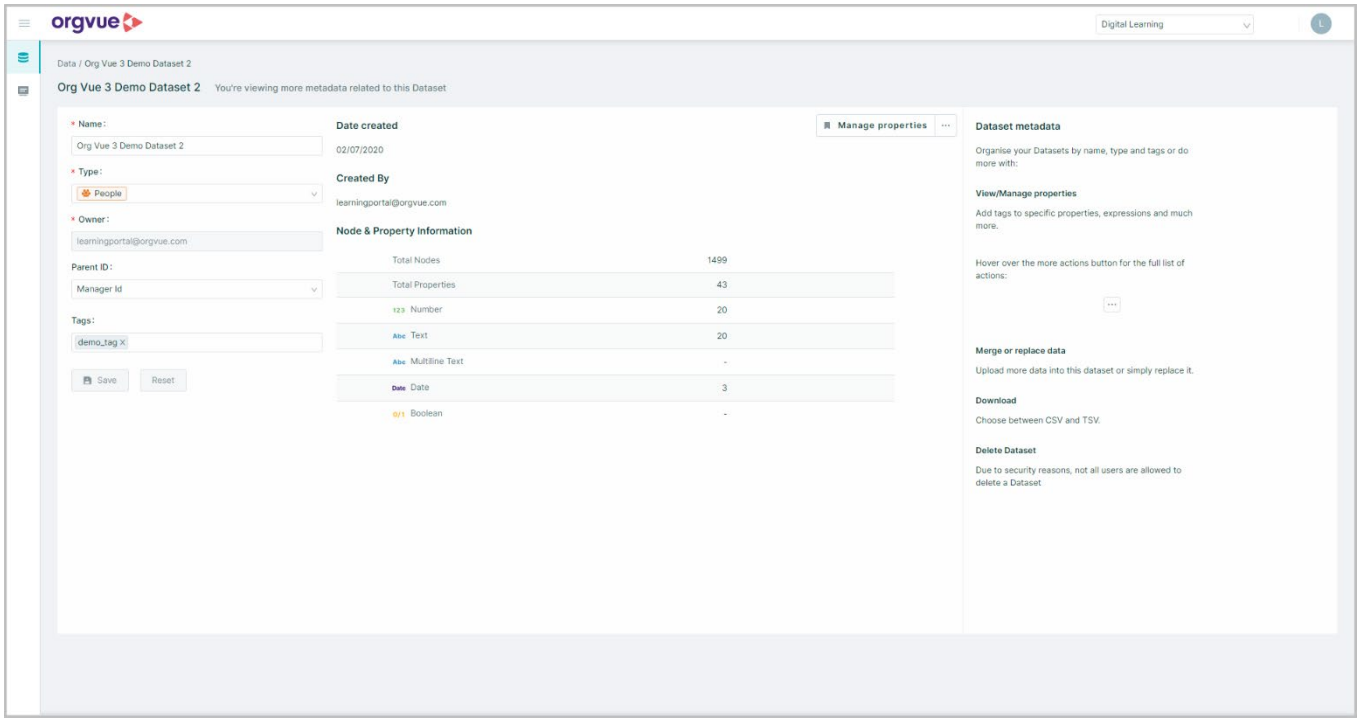
4.0 Editing Dataset metadata (New)

Select the hyperlink on any dataset name from the **Homescreen** (fig a) to access the edit metadata screen

This will open a screen (fig b) with access to edit the following:

- *Dataset Name: Amend or enter a new name for dataset
- *Dataset Type: Select dataset type from dropdown list
- *Dataset Owner: Non amendable field
- Parent id: select property in dataset to parent by and therefore change hierarchy
- Dataset tags: Free text field to enter tags to control dataset access e.g. view:user, update:user, hide:user, manage:user
- Node & Property Information: Non-editable summary of dataset
- Save: Button will be shown and shaded blue when there are unsaved changes

*Mandatory field



Note on changing parent id:

- Changing the parent id property will change the hierarchy in any pack created from the dataset when the pack is next opened 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

5.0 Editing Properties

From the edit metadata screen for a dataset it is also possible to select the **Manager Properties** button (fig a)

This will open the Property Manager screen that lists all the properties present in the dataset along with details of:

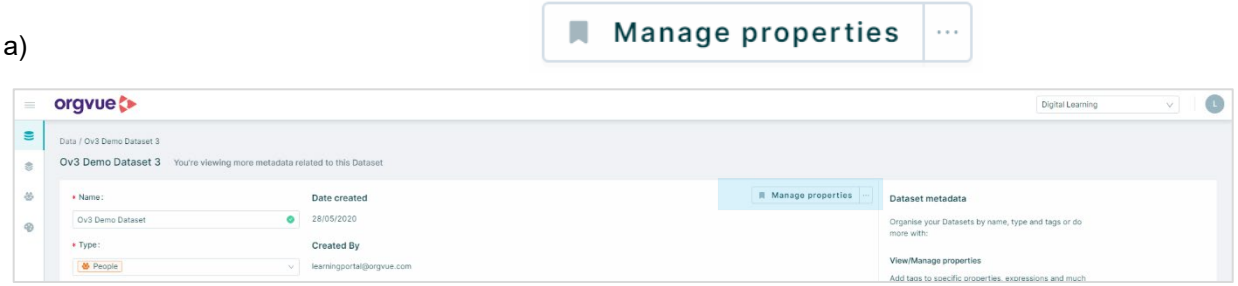
- Property Name
- Property Key
- Property Type
- Property Tags
- Property Aliases
- Property Required Y/N

Each column can be used to sort the data in ascending or descending order using the up/down button (fig b)

Properties displayed in columns can also be filtered using the Filter button (fig c)

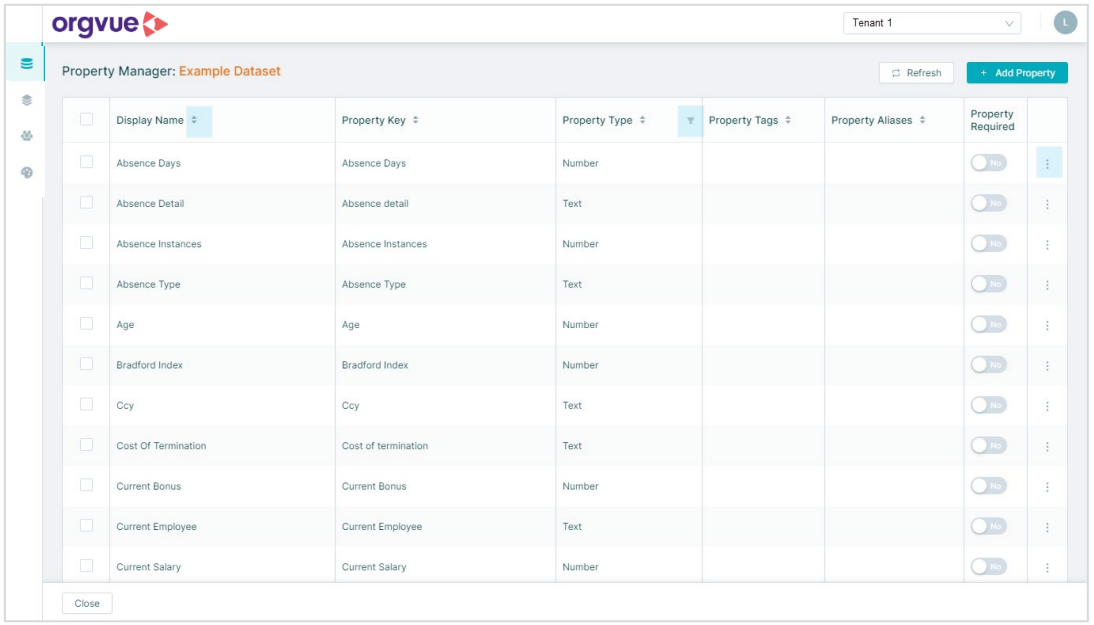
Selecting the **more details** ellipsis button (fig d) will open the Property Menu (fig e)

(fig a)

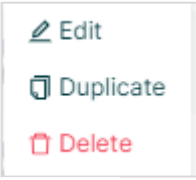


(fig b)

(fig c)



(fig d)



(fig e)

Continued on next page

5.0 Editing Properties

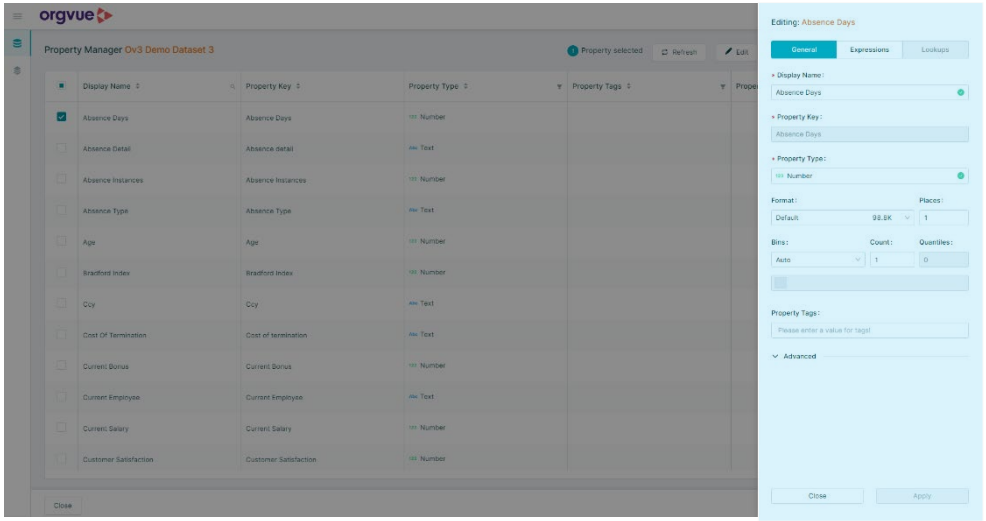
Continued

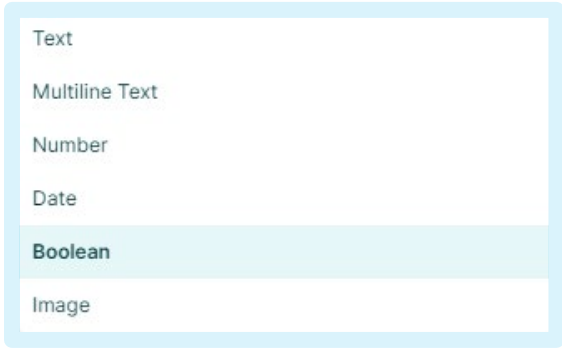
Selecting **Edit** from the Property Menu will open the edit property side panel

The options available to edit on the side panel will be dependent on property type selected

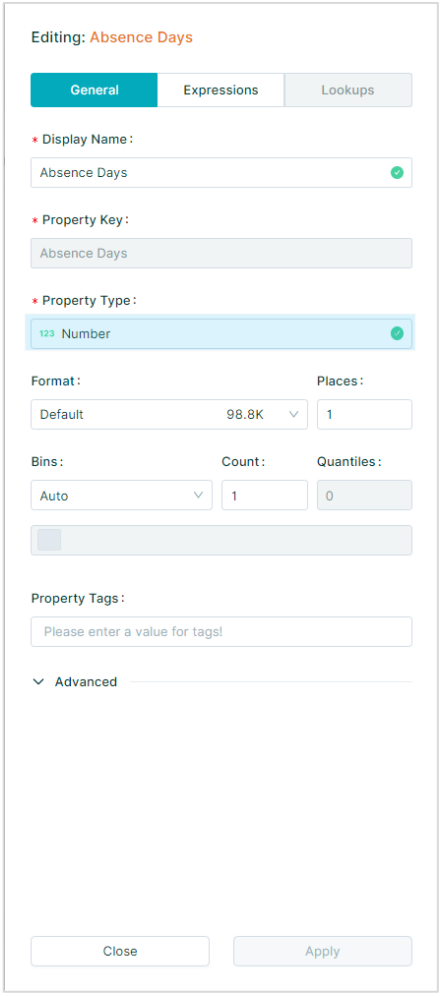
The available property types are selected from a dropdown menu (fig a)

- Text
- Multiline Text
- Number
- Date
- Boolean (True / False)





(fig a)



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5.0 Editing Properties

Continued

Selecting **Edit** from the Property Menu will open the edit property side panel

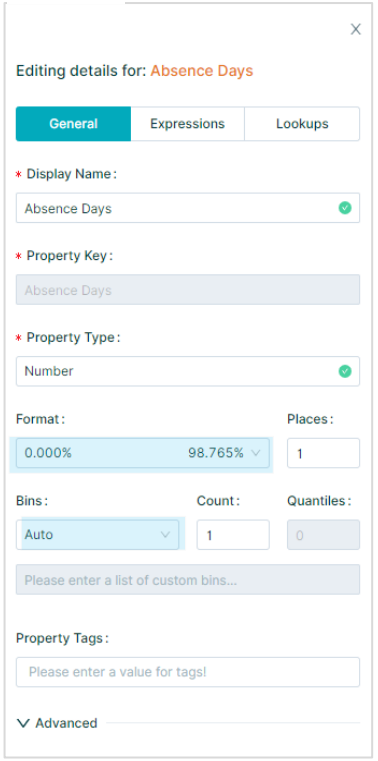
The options available to edit on the side panel will be dependent on the property type selected

For a number property (fig a) the following options are available to edit:

- Display Name
- Property Type
- Format – dropdown menu (fig b) to select required number format
- Bins – select from dropdown menu options of Auto, Quantiles or Custom
- Count - used with Auto bins option to set the number of bins for property
- Quantiles – used with quantiles bins option to set the number of quantiles
- Custom – Used with custom bins option to enter a custom bins list (comma separated)
- Property tags – free text field to enter any property tags

Continued on next page

(fig a)



(fig b

0.000%	98.765%
#,##0.000	98,765.432
£#,##0.00	£98,765.43
$#,##0.00	$98,765.43
€#,##0.00	€98,765.43
¥#,##0.00	¥98,765.43
#,##0.00K	98.8K
£#,##0.00K	£98.8K
$#,##0.00K	$98.8K
€#,##0.00K	€98.8K
¥#,##0.00K	¥98.8K
#,##0.00M	0.10M
£#,##0.00M	£0.10M
$#,##0.00M	$0.10M
€#,##0.00M	€0.10M
¥#,##0.00M	¥0.10M

5.0 Editing Properties *Continued*

For a date property (fig a) the following options are available to edit:

- Display Name
- Property Type
- Format – dropdown menu (fig b) to select required date format
- Property tags – free text field to enter any property tags

Important date formats: when uploading properties data as dates from **csv** files they must be entered in ISO format YYYY-MMM-DD or long date format, if uploading from **XLSX** then any Excel date format is acceptable

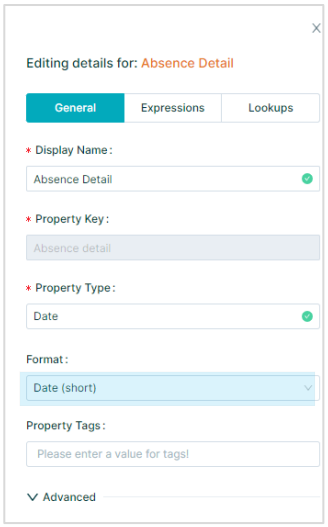
For a Boolean property (fig c) the following options are available to edit:

- Display Name
- Property Type
- Format – dropdown menu (fig d) to select required format
- Property tags – free text field to enter any property tags

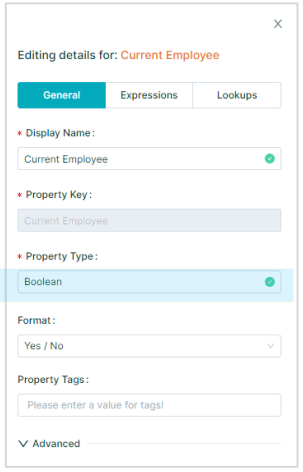
For a text or multiline text property (fig e) only the following options are available to edit:

- Display Name
- Property Type
- Property tags – free text field to enter any property tags

(fig a)

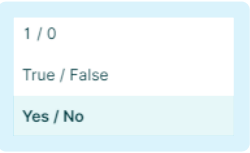


(fig c)

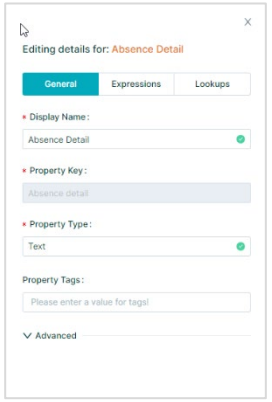


(fig b)

(fig d)



(fig e)



6.0 Adding Properties

It is possible to add a property to your dataset using the **+ Add Property** button (fig a) from the dataset property manager

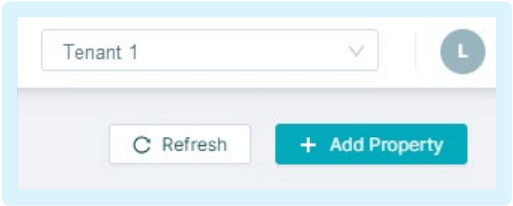
This will open the **edit details** side panel (fig b) for the new property where you can enter the following details:

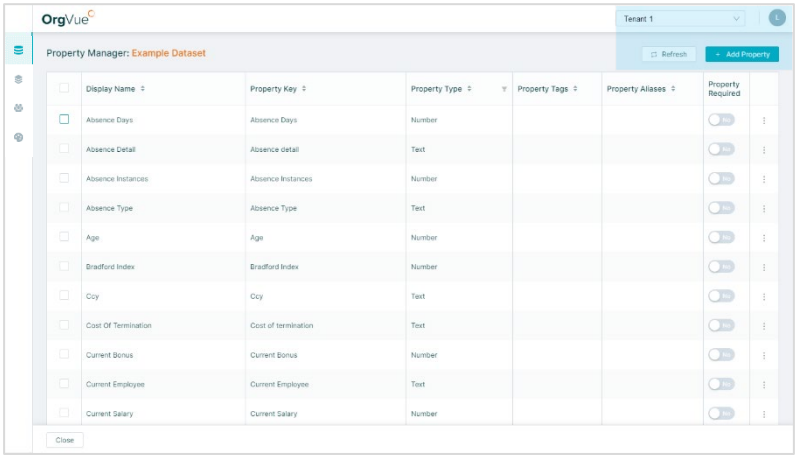
- *Display Name
- *Property Key
- *Property Type
- Property tags – free text field to enter any property tags

The property types are selected from a dropdown list. (fig c)

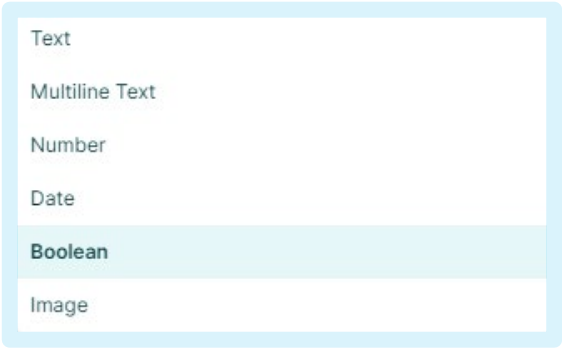
*Mandatory field

(fig a)

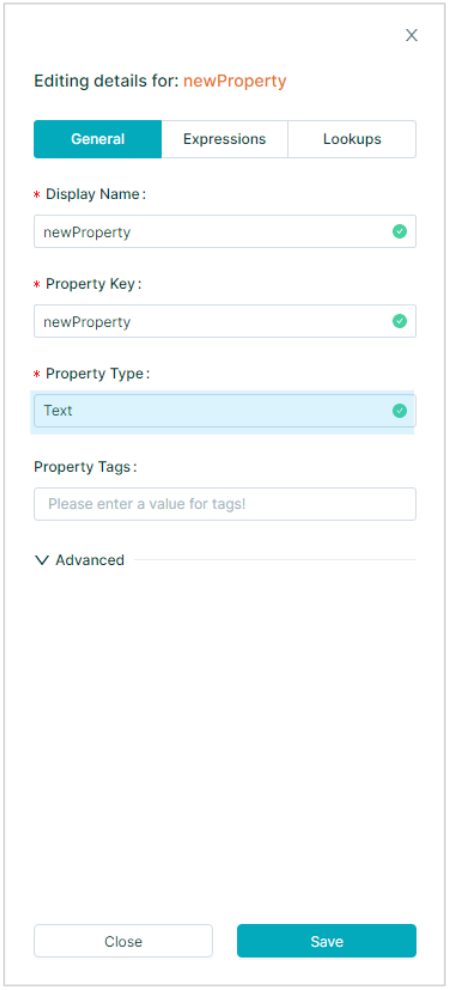




(fig c)



(fig b)



7.0 Expression Properties

When adding new properties or editing existing properties, it is possible to include expressions to create calculated properties

This may range from simple mathematical calculations that add two properties together, to provide a sum, through to more complex logic based transformations of data

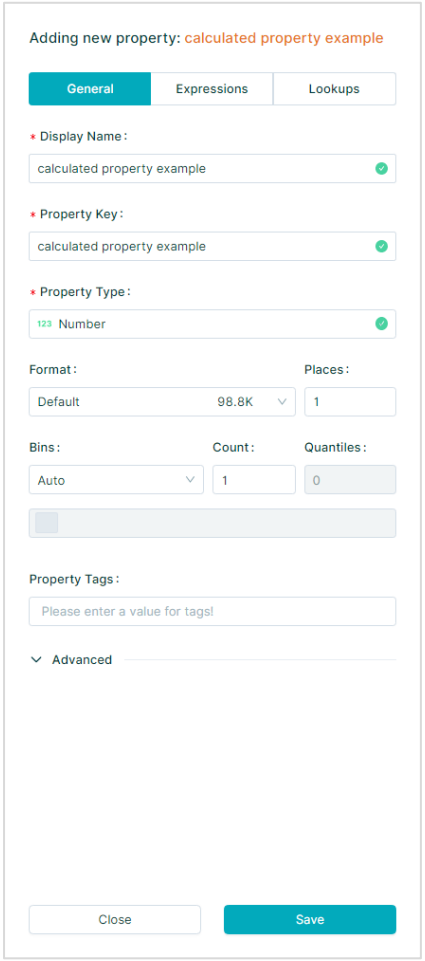
Expressions in orgvue are written in Gizmo. It is a scripting language that has its roots in JavaScript but has been added to and modified by the orgvue development team

For further detail on Gizmo expressions please go to the Gizmo cookbook on the orgvue support portal

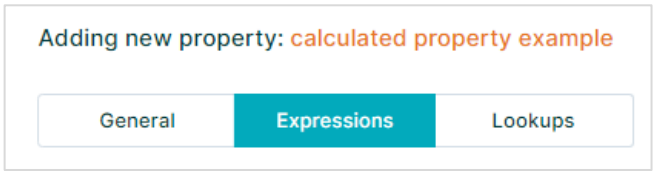
To add a new property with an **expression** first follow the steps in 6.0 Adding Properties (fig a)

Then select the **expressions** tab of the property window (fig b)

(fig a)



(fig b)



Continued on next page

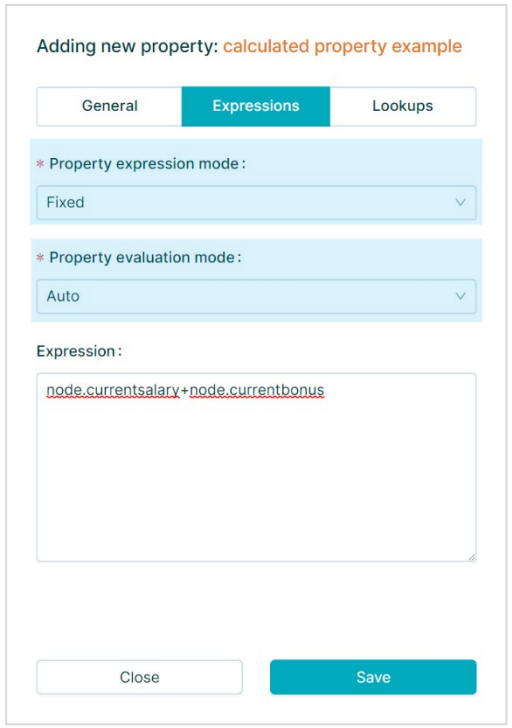
7.0 Expression Properties *continued*

On the Expressions tab of the property window, there are three fields (fig a) to be completed:

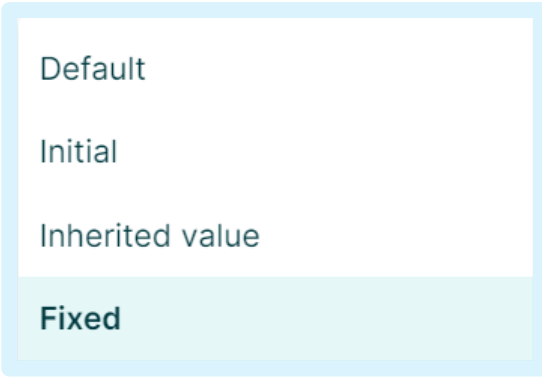
- **Property expression mode** Drop down menu (fig b) to select required expression mode. For more detail on expression modes see Properties Default Values on the Support Portal
- **Property evaluation mode** Drop down menu (fig c) to select required evaluation mode. For more detail on evaluation modes see Evaluation Options on the support portal
- **Expression** window (fig d)to enter expression in Gizmo script

Click **Save** to save the expression within the property

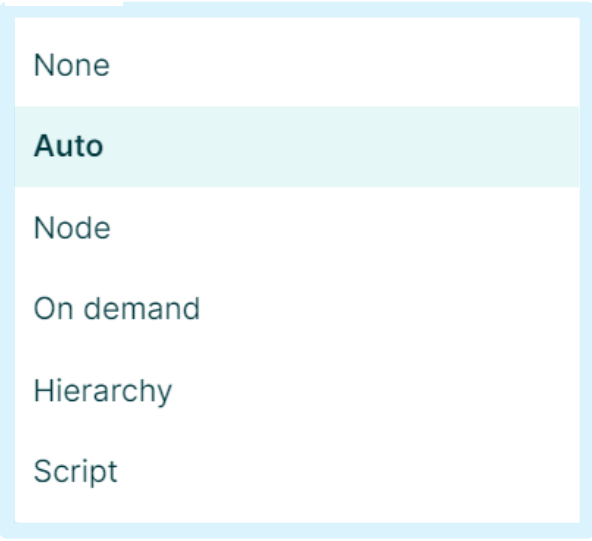
(fig a)



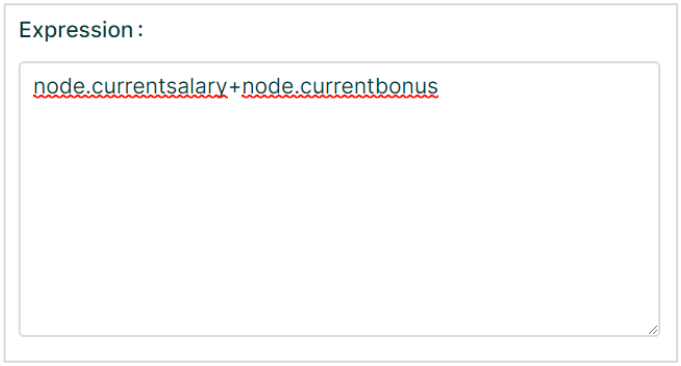
(fig b)



(fig c)



(fig d)



8.0 Lookup Properties

New or existing properties may be linked to lookup datasets that have been loaded into your tenant with the dataset type set to **Lookup**

Lookups allow you to reference a central source of data that may change on a regular basis without having to change all the datasets using the lookup data

A common example would be an exchange rate table to provide currency conversion rates to all salaries entered in local currency based on the location property

If a new property is being added to link to a lookup, follow the steps in 6.0 Adding Properties to complete the mandatory fields on the **General tab** first

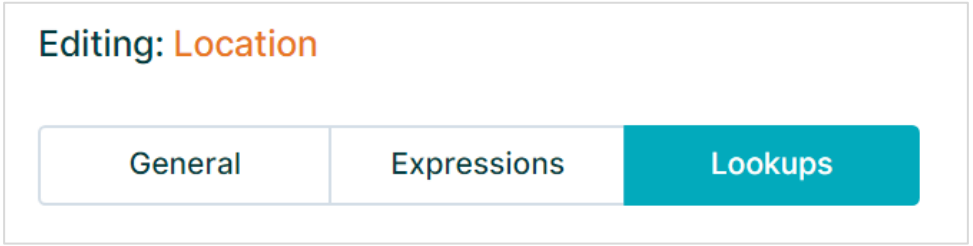
To set a property to reference a lookup table, select the **lookup tab** on the property window (fig a)
Then within the window (fig b) first select the lookup type from the drop-down list (fig c). If the lookup dataset has been saved with the name of the property being looked up from, then the **Auto** option can be selected

Otherwise select **Dataset** as the lookup type and then select the name of the lookup dataset in the **Target Dataset** window

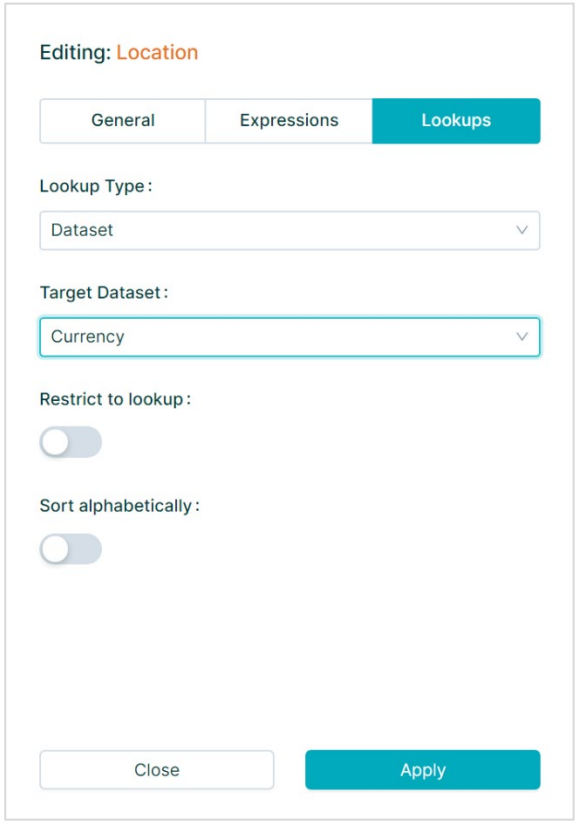
Further options allow you to restrict data entry to this property to just those in the lookup table for data validation and to also sort the options alphabetically

For further detail on Lookups see Lookup Support Article

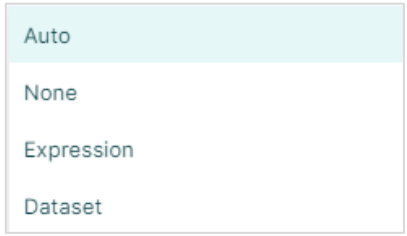
(fig a)



(fig b)



(fig c)



8.1 Master sub-tenant lookups (New)

Users with a master sub-tenant setup can create lookups in a master tenant, which will then be available to be applied to any dataset in a sub-tenant

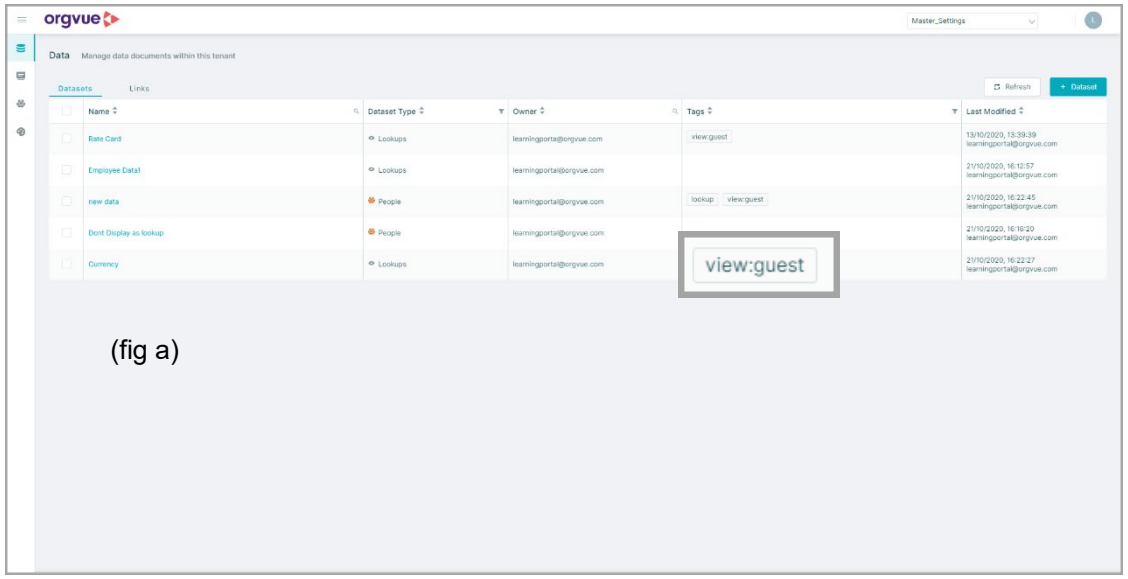
For a dataset to be available as a lookup in a sub-tenant, one of the following options must be applied in the master tenant

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

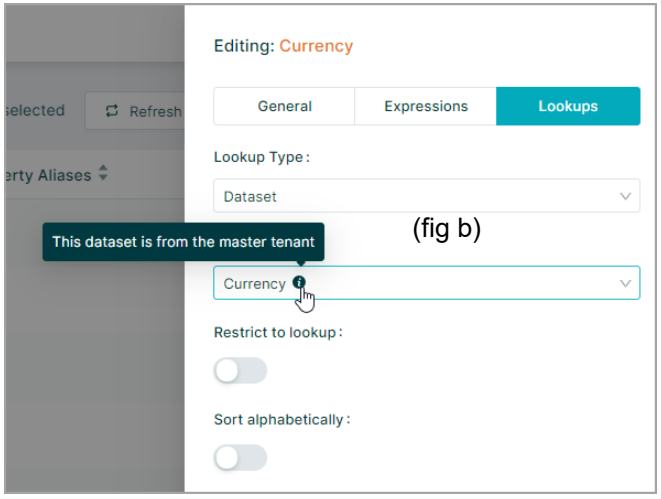
Permissions:

1. The lookup will become available to users in the sub-tenant when it is tagged as **view:guest** (fig a) in the master tenant
2. If an admin has access to both the master and sub-tenant, they will have access to the lookup regardless of the tab

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 (fig b)



(fig a)



(fig b)

8.2 Expression lookups (New)

An expression lookup allows you to define what options are available when updating a property value

This may be useful to limit inputs to a property value to ensure data cleanliness. An example of this may be to limit the locations available to select from, to only London, New York & Paris

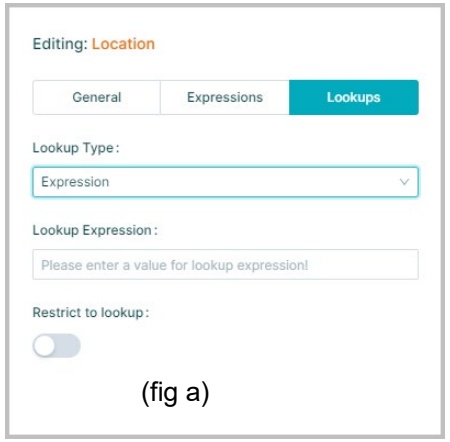
This can be done for existing or new properties. To apply an expression lookup to a new property first follow the steps in 6.0 Adding Properties

Then for new, or existing properties, select the **Lookups** tab and set the **Lookup Type** to **Expression** (fig a) via 5.0 Editing Properties

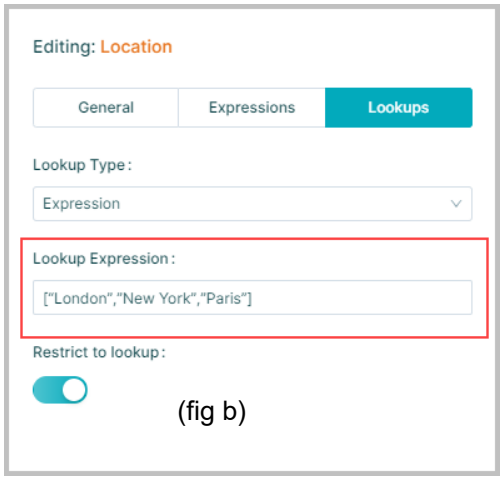
The lookup expression must be entered inside square brackets [ ] with each option in quotation marks " and separated by comma ,
For the example location lookup, the expression would be:
["London","New York","Paris"]

This expression should be entered into the lookup expression field (fig b) and the **restrict to lookup** switch used if only the options in the lookup expression are permitted for entry. If the switch is left in the **off** position, then the lookup values will be available in the dropdown to select from, but other values may be entered too

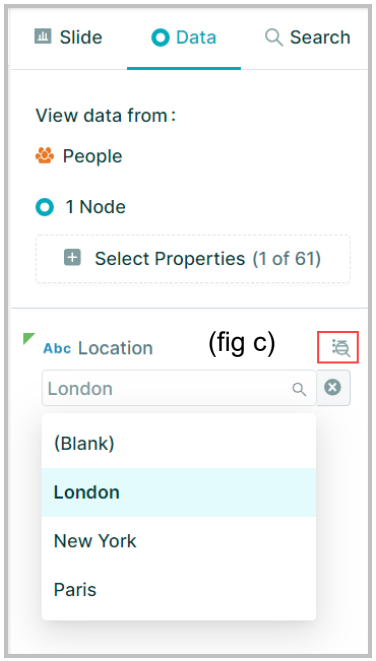
Any property with a lookup expression will show the lookup icon on the data panel when selected (fig c)



(fig a)



(fig b)

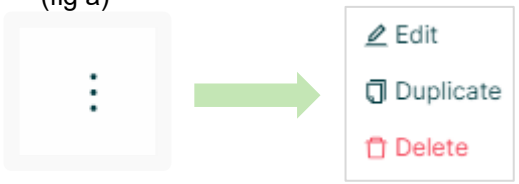


(fig c)

Note: It is important to ensure the correct format quotation marks are used in the expression. These must be straight quotation marks " as displayed in notepad rather than the left / right “” quotation marks found in Word. Typing the expression directly into orgvue rather than copying and pasting will ensure the correct character is used

9.0 Duplicating Properties

(fig a)

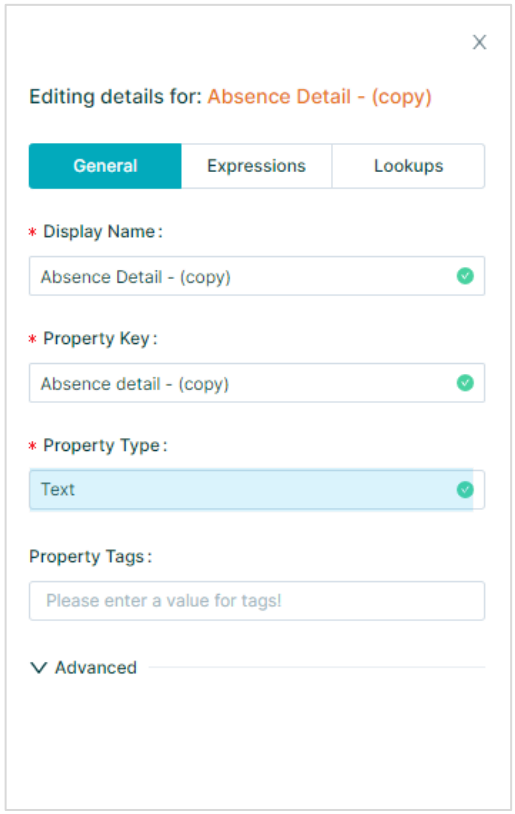


It is possible to duplicate another property within your dataset and this may often be easier than adding a property, if all property formats & details are the same

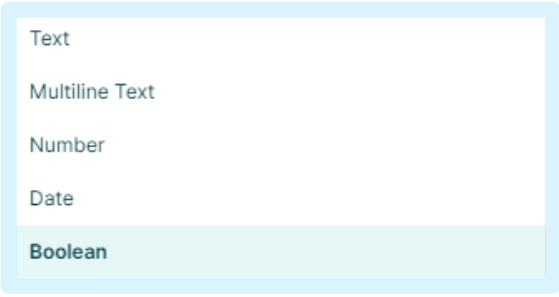
From the **Property Manager** screen, select the **more details** button on the property you wish to duplicate to open the property menu and select the Duplicate option (fig a)

This will open the **edit details** side panel (fig b) for the duplicated property where you can enter or edit the following details:

(fig b)



(fig c)



- *Display Name
- *Property Key
- *Property Type
- Property tags – free text field to enter any property tags

The property types are selected from a dropdown list (fig c)

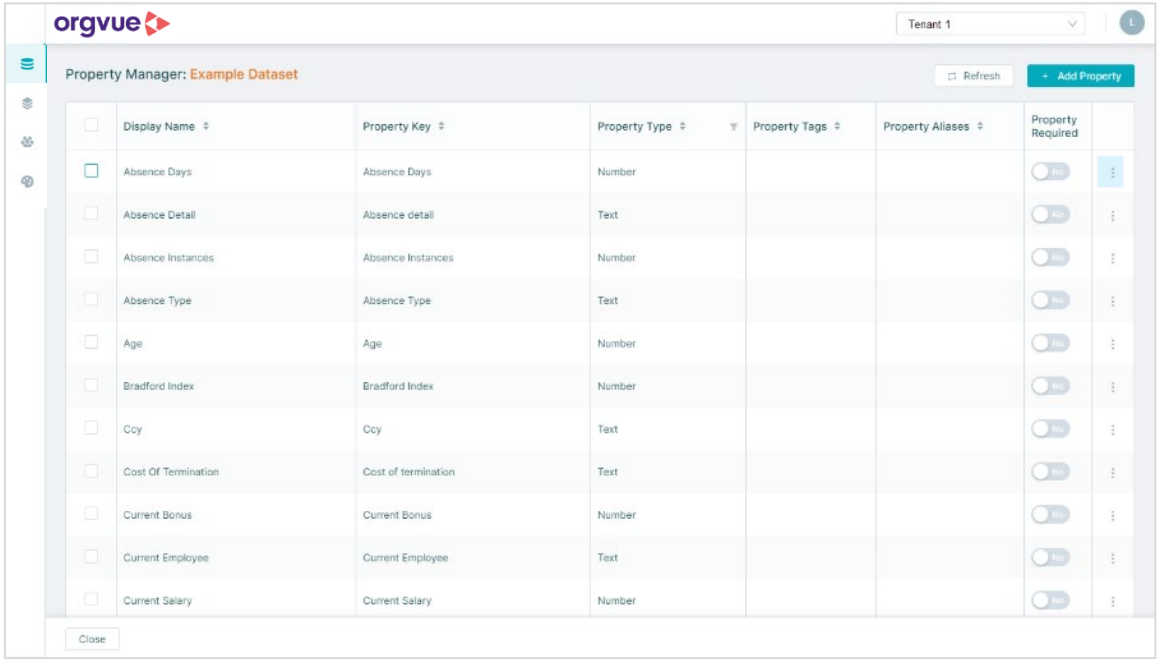
*Mandatory field

10.0 Deleting Properties

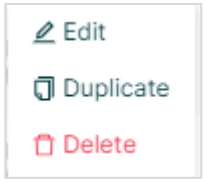
To delete a property, select the more details button in the **Property Manager** for the required property (fig a)

Select the Delete option in the **Property Menu** that opens (fig b)

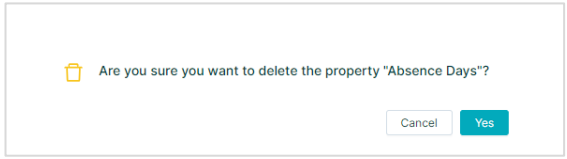
Confirm that you wish to delete the property in the message box (fig c)



(fig a)



(fig b)



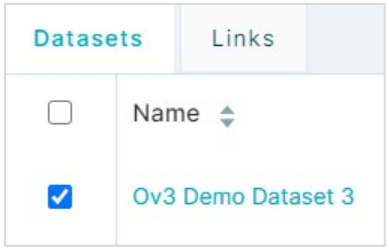
(fig c)

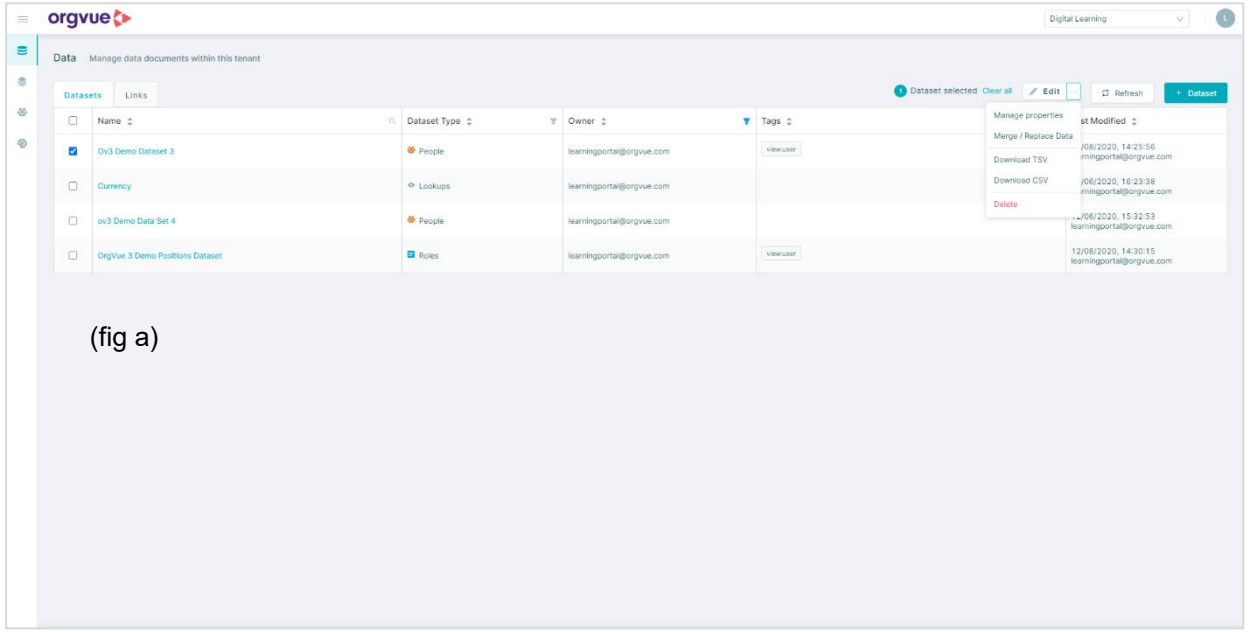
11.0 Merge / Replace dataset

It is possible to update the data held in a dataset with the following options:

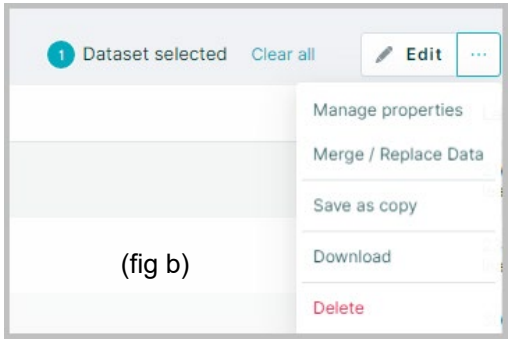
- Merge – This option will merge the uploaded data into the target dataset, preserving all other unchanged data
- Merge & delete – This option will merge the uploaded data into the target dataset and will delete any rows in the target dataset that are not in the uploaded data. All properties are preserved
- Replace – This final option replaces all data in the target dataset with the uploaded data, deleting rows and columns (properties) that are not in the uploaded data

To merge or replace a dataset, from the Homescreen select the required dataset (fig a) then select the additional actions menu (fig b) and select **Merge / Replace Data**





(fig a)



(fig b)

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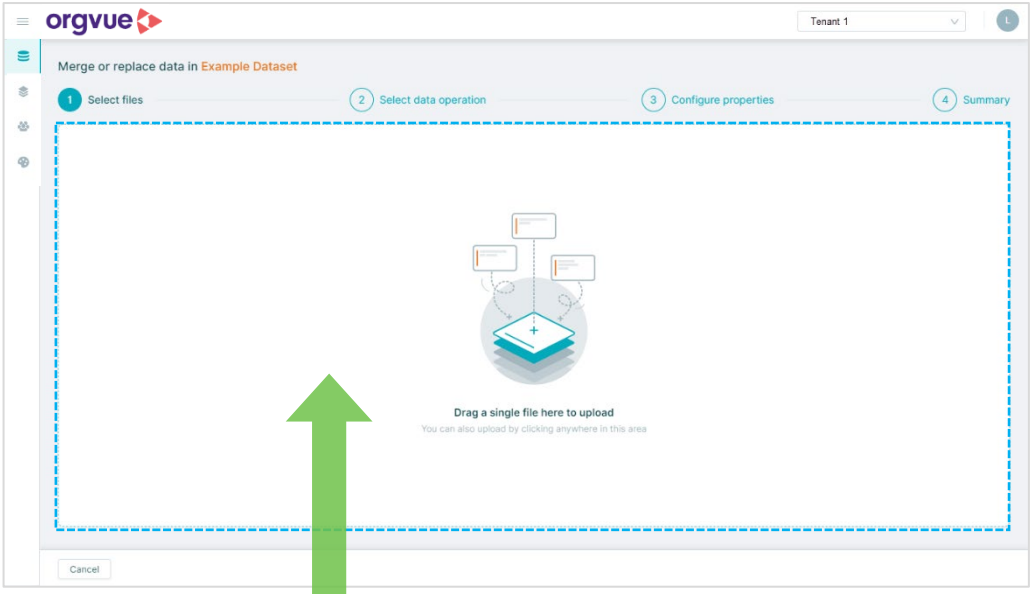
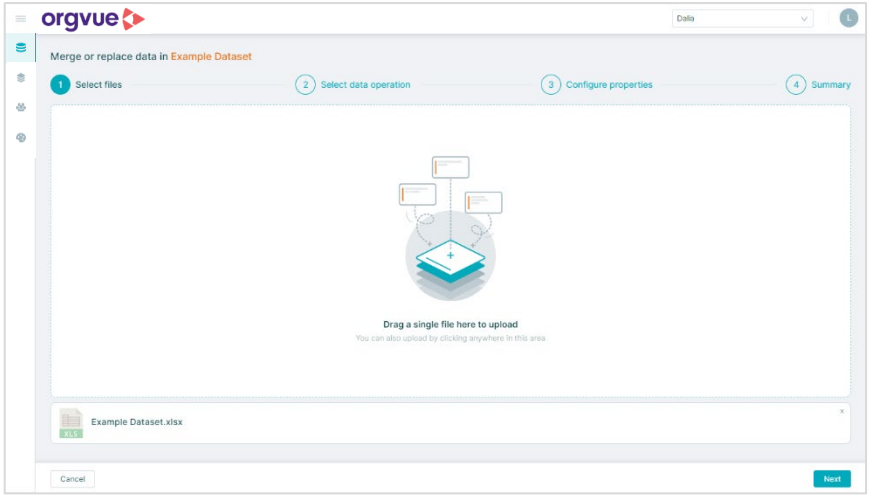
11.0 Merge / Replace dataset *Continued*

The blue dotted line indicates the upload area
Click anywhere within this area to open a file selection window or drag your file onto the upload area
Supported file formats: .xlsx, .json, xml, .xls, .ods, .csv, .dbf, .rtf
Click Next (fig a) to continue to step 2





(fig a)

Continued on next page

11.0 Merge / Replace dataset *Continued*

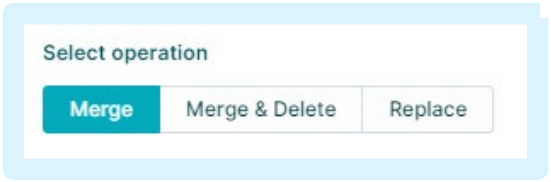
The selected file will be imported by the application, a sample of the imported file will be displayed and you then have the option to select the operation to perform on the file (fig a)

- Merge
- Merge & Delete
- Replace

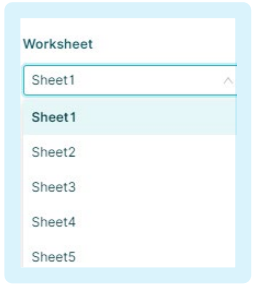
  Note: The replace option will only be available if the selected file contains the ID property of the destination dataset

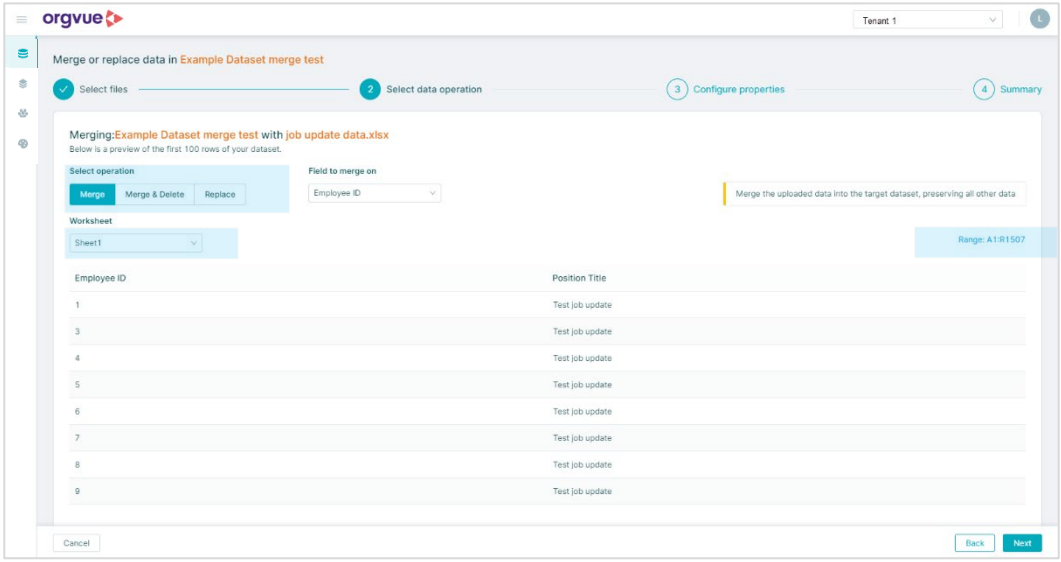
If the selected file has more than one sheet populated, then the option is given to select the required sheet (fig b) and once the sheet is selected, the sheet range is displayed (fig c)
Once the required selections have been made, click **Next** to continue to step 3

(fig a)



(fig b)





(fig c)

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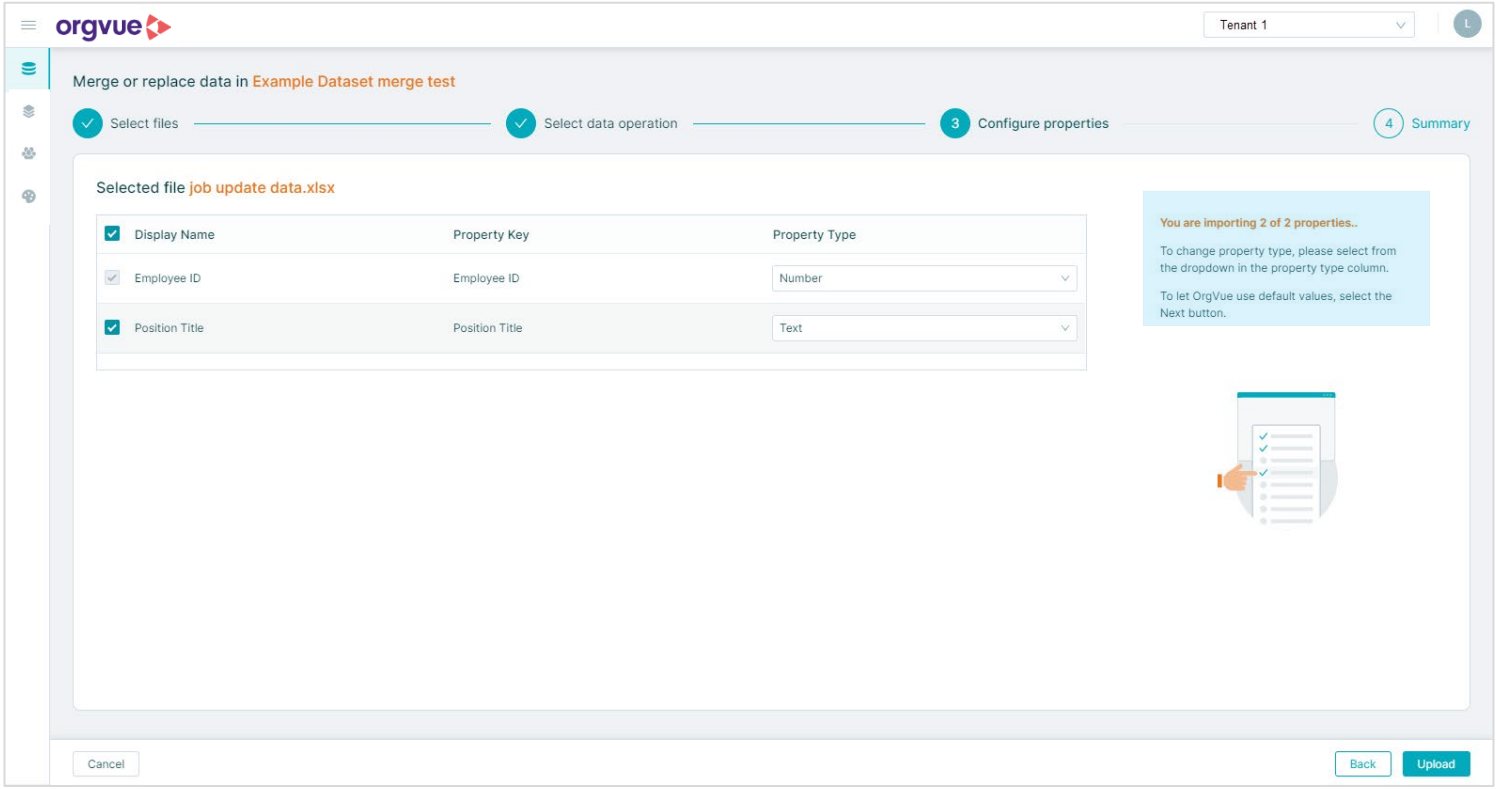
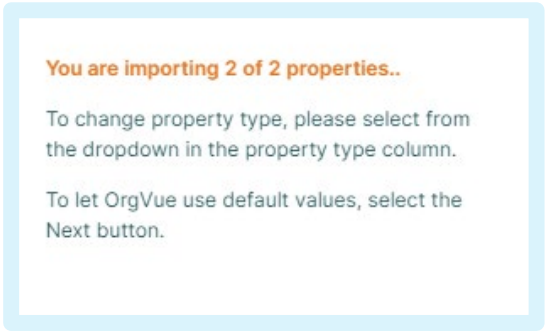
11.0 Merge / Replace dataset *Continued*

Step 3 allows you to configure the properties being merged by using the dropdown selection boxes for each property type
At this stage you can also deselect any properties that you do not wish to import in the merge
A confirmation message will be displayed on the screen confirming the number of properties being imported (fig a)
Click **Upload** to continue



(fig a)



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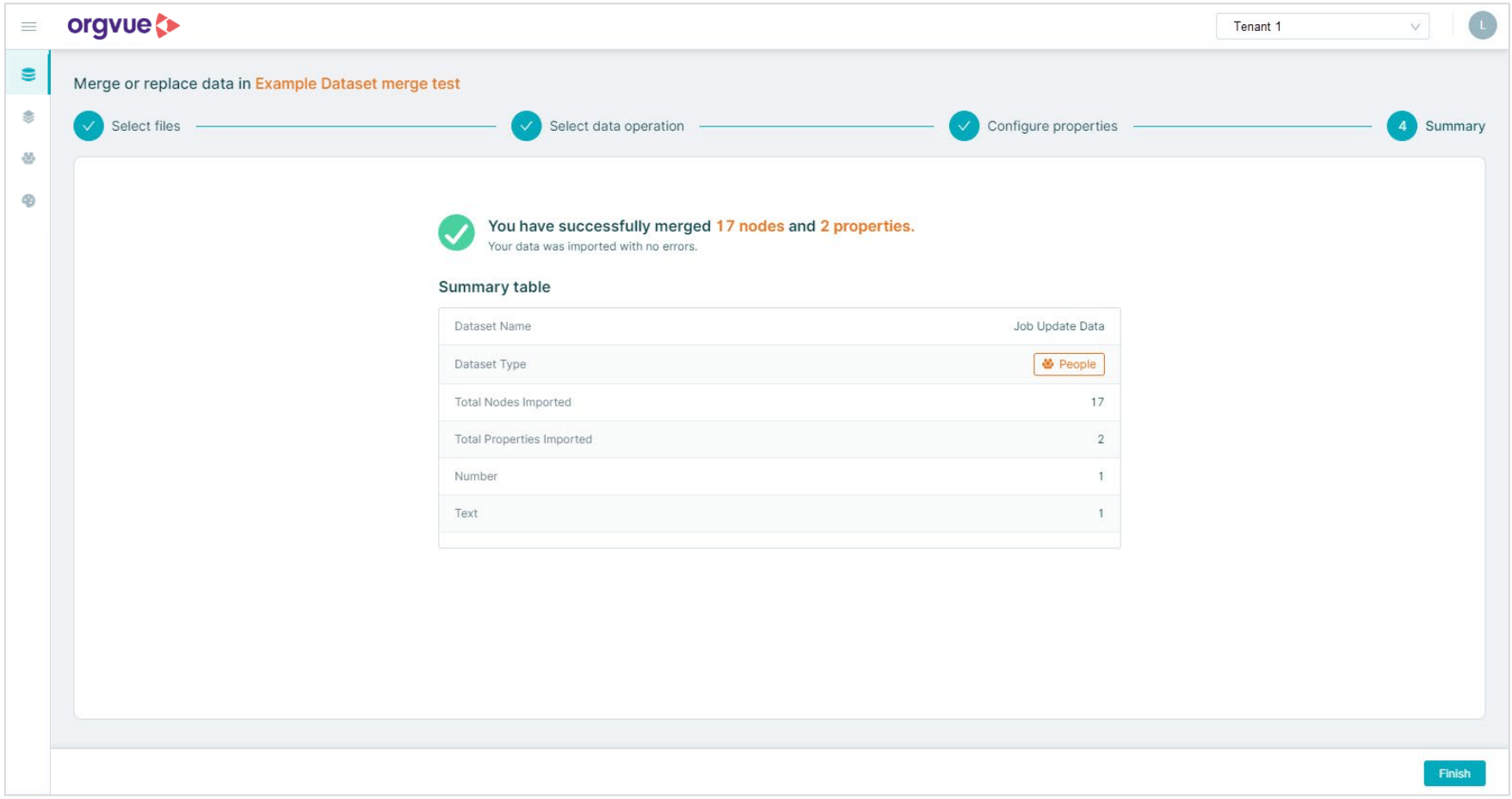
11.0 Merge / Replace dataset *Continued*

The final step in the merge / replace process displays a summary of the nodes and properties that have been imported
Click **Finish** to complete the process



12.0 Downloading a Dataset (New)

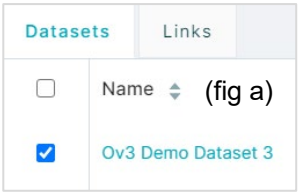
To download a dataset from the **Homescreen** select the required dataset (fig a)

Then select the more details button (fig b) to open the additional actions menu to select **Download**

A pop up window (fig c) will allow you to select the format of any date fields in your dataset when downloaded, and also the file format of the download in either **CSV** or **TSV**

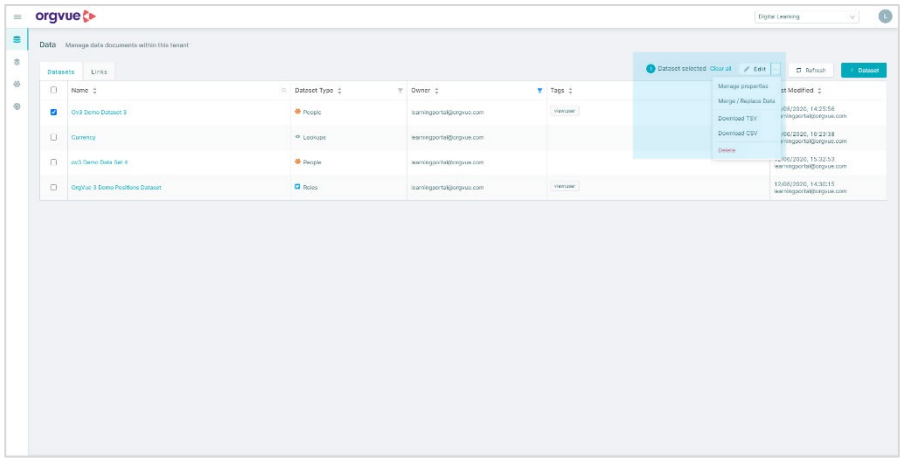
Make the selections and click **Download** to proceed

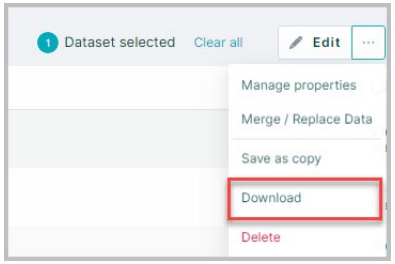
A confirmation message will appear at the top of the screen to show completion of download (fig d) followed by a Save As dialogue box (fig e) allowing you to select where to save the download



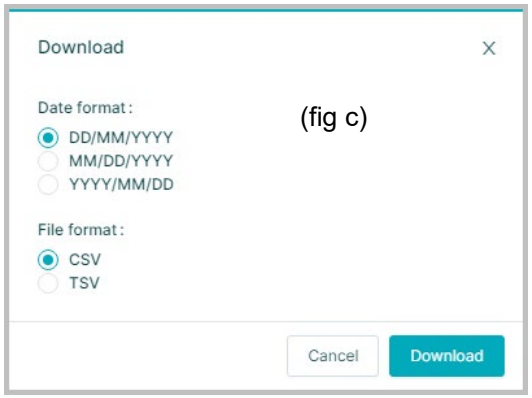
(fig a)

(fig b)

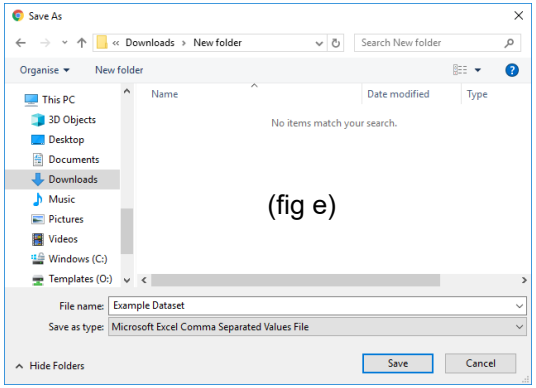




(fig d)



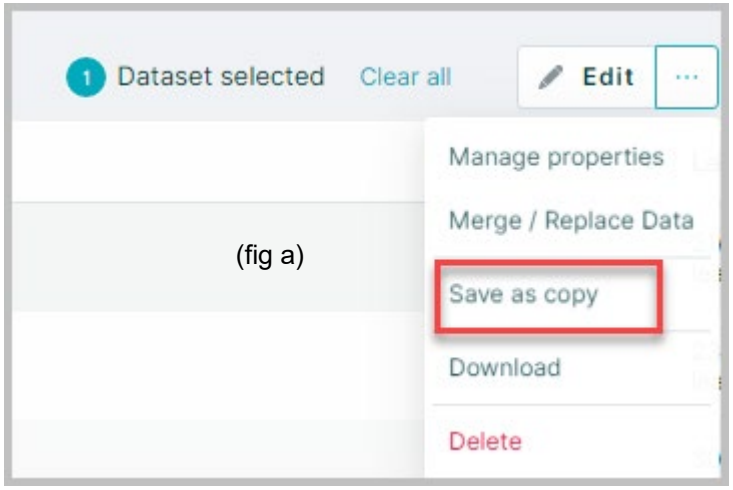
(fig c)



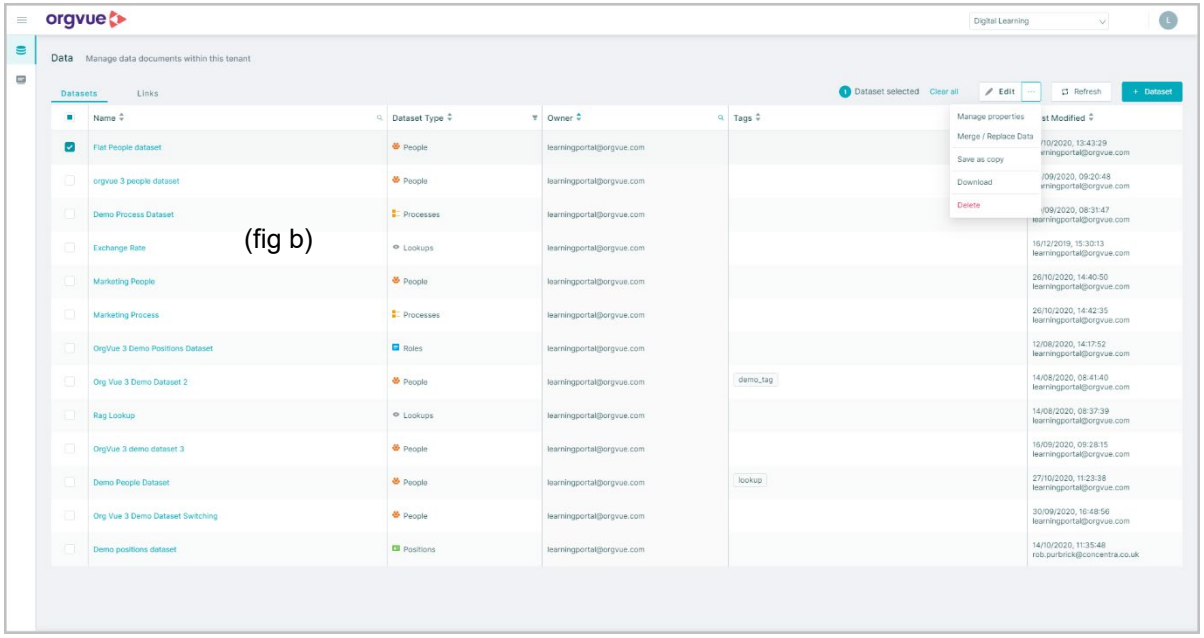
(fig e)

13.0 Create a save-as copy of a dataset (New)

It is possible to create a copy of a dataset from the drop down menu (fig a) when a dataset is selected (fig b)



(fig a)



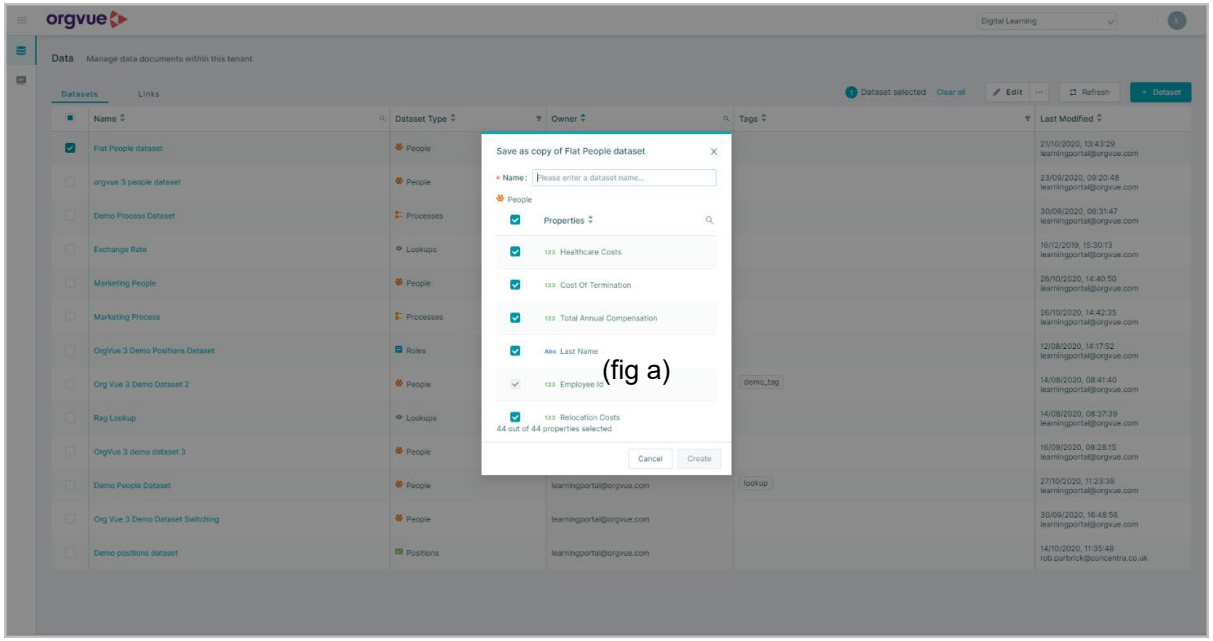
(fig b)

13.0 Create a save-as copy of a dataset (New) *continued*

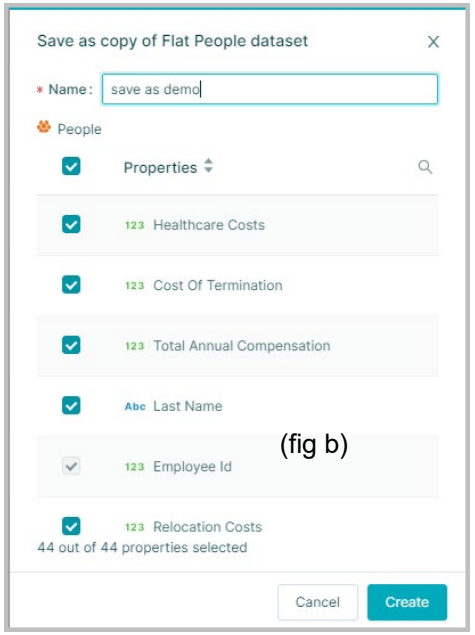
Once the **Save as copy** option is selected, a new window (fig a) will be presented to enable the user to enter a name for the copied dataset as well as de-select any properties not required in the copy
Users will only be able to create a save-as of the properties that they have access to
Note the following when creating a save-as:

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

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



(fig a)



(fig b)

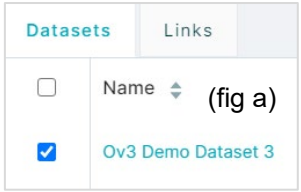
14.0 Deleting a Dataset

To delete a dataset from the **Homescreen** select the required dataset (fig a)

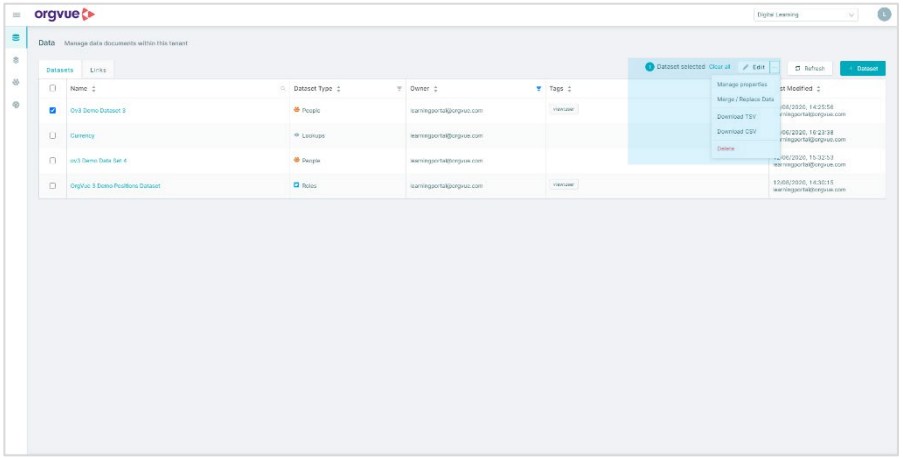
Then select the more details button (fig b) to open the additional actions menu to select **Delete**

A pop-up message (fig c) will ask you to confirm the deletion

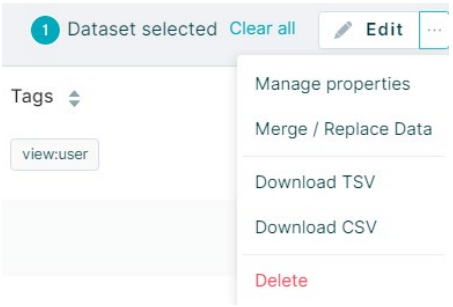
WARNING this action cannot be undone



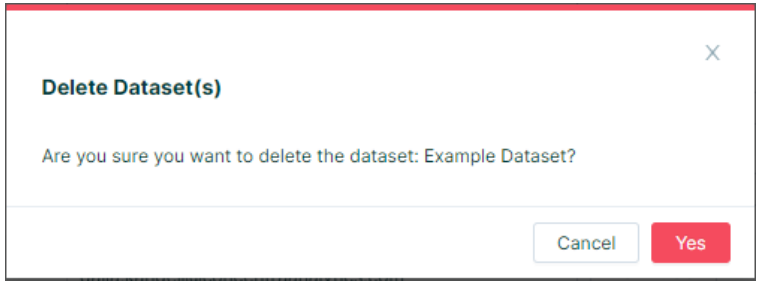
(fig a)



(fig b)



(fig c)



15.0 User Management

Selecting the users icon (fig a) on the left hand toolbar from the Homescreen will display the list of users for the current tenant (fig b)

To view the data on this screen, you will need to have the role of Admin in your profile. If you attempt to view this screen with the role of user a “No users to show” message will be displayed (fig c)

If you have the correct role, then the following columns will be displayed by default for each user row:

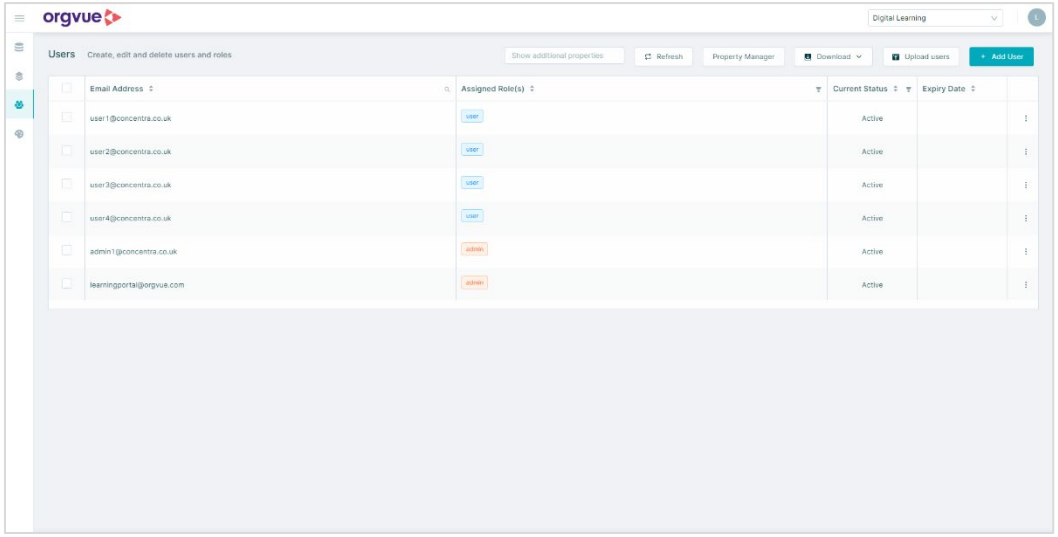
- Email Address
- Assigned Roles
- Current Status
- Expiry Date

Selecting the more options ellipsis menu button (fig d) for a user record also opens a menu (fig e) to:

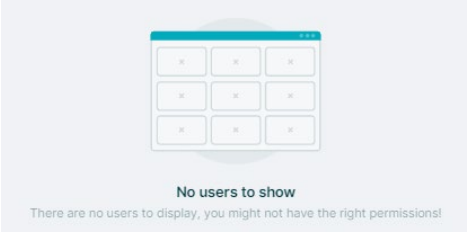
- Edit user
- Delete

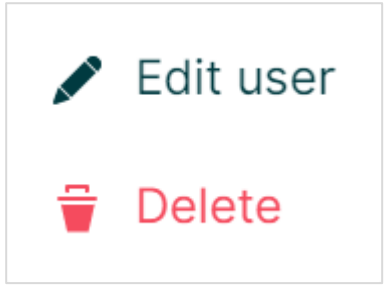
(fig a)

(fig b)



(fig c)





(fig e)

(fig d)

15.1 Adding a user

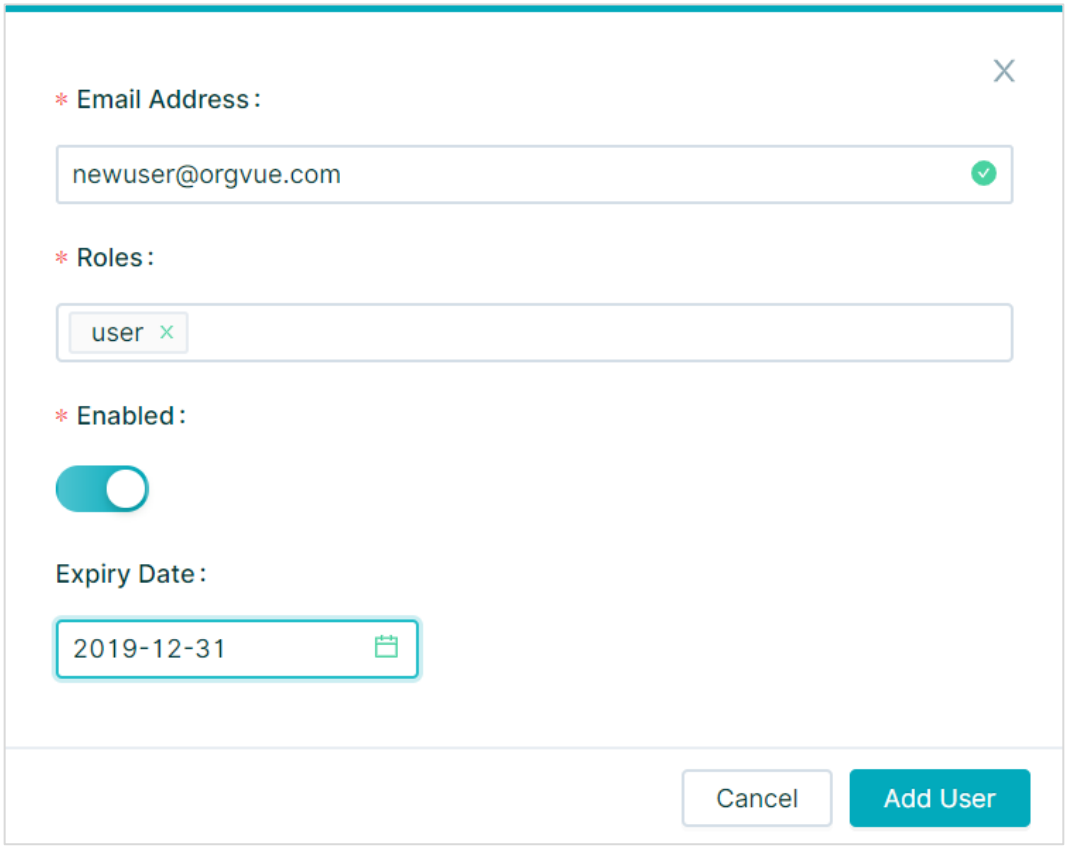
To add a new user to the tenant, click the **+ Add User** button (fig a) on the right User Management screen

This will open a dialogue box (fig b) to enter the new user details:

- Email address
- Roles - all accounts require the role of either **user** or **admin** in addition to any custom roles**.** If the user requires access to the Survey Admin module, the role **surveyAdmin** should also be entered
- Enabled – toggle switch to set user as true or false.
- Expiry Date – ability to set a future date to expire user account

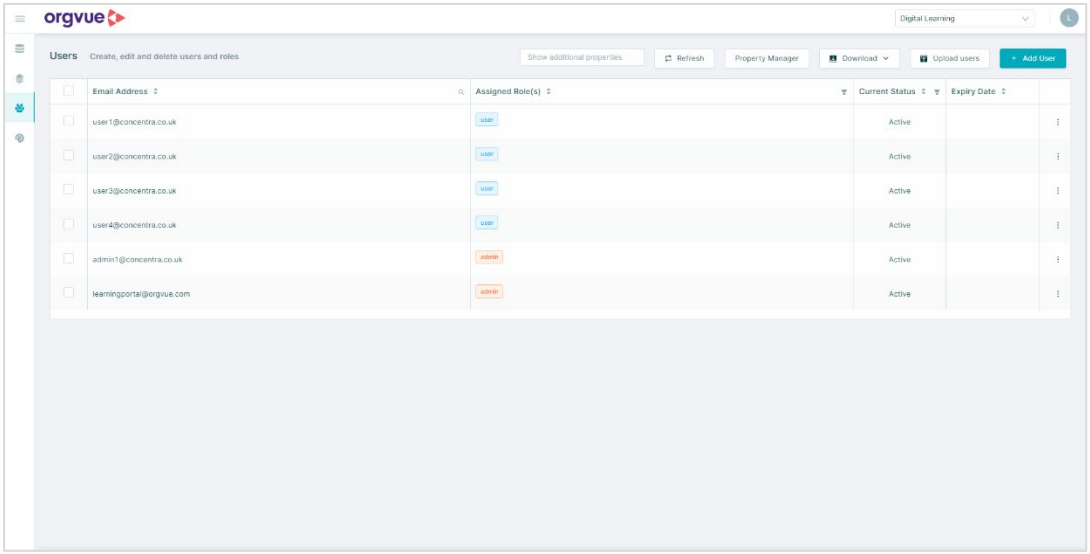
(fig a)

(fig b)



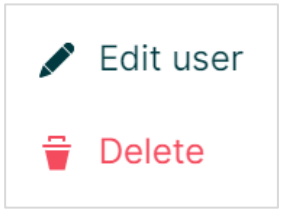
15.2 Edit a user

Selecting the more options ellipsis menu button (fig a) for any user will open a small menu window (fig b). Selecting **Edit user** will open the side panel (fig c)
This edit panel will enable you to amend all user details except for the email address. If you need to amend email address for a user add the correct email as a new user, then delete the old account

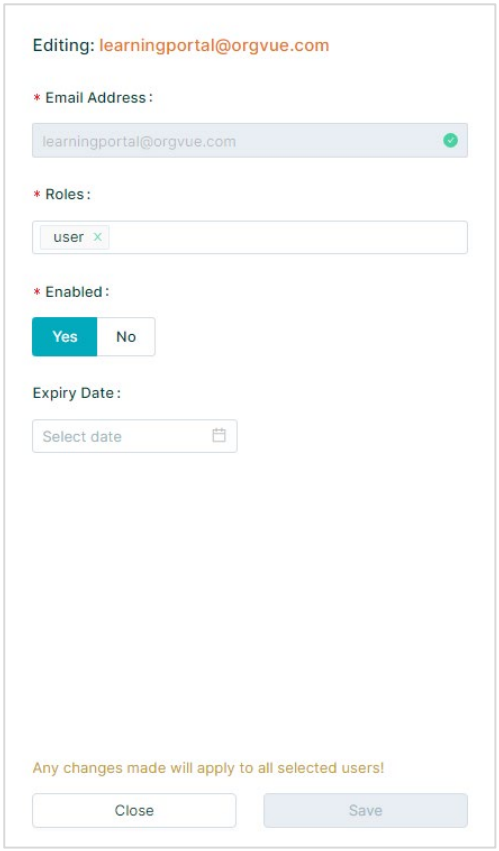


(fig a)

(fig b)

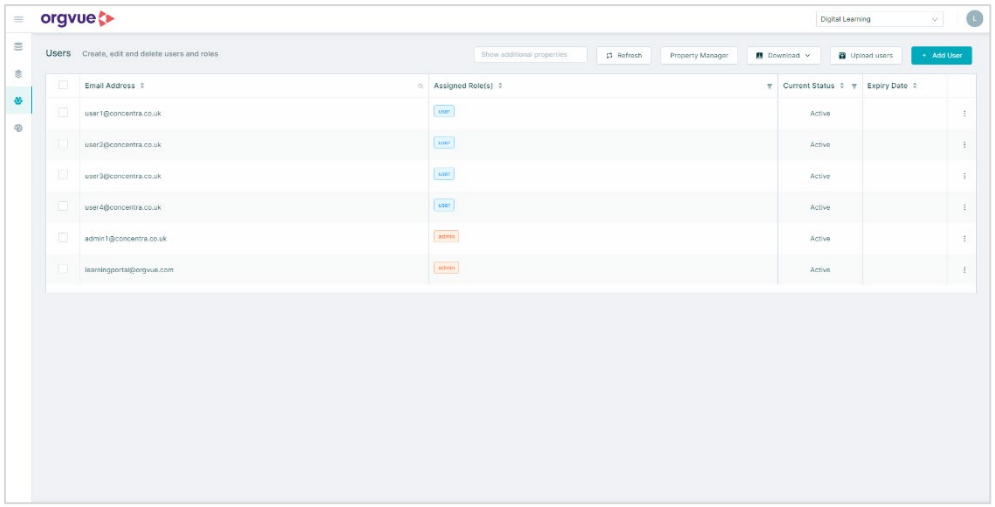


(fig c)

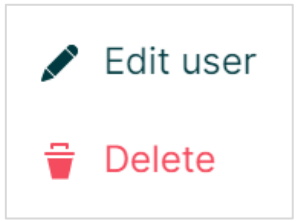


15.3 Delete a user

WARNING this action cannot be undone
To delete a user account, select the more options ellipsis menu (fig a) and then Delete for the required user (fig b)
A confirmation prompt message will then be displayed (fig c) and selecting Yes will delete the user

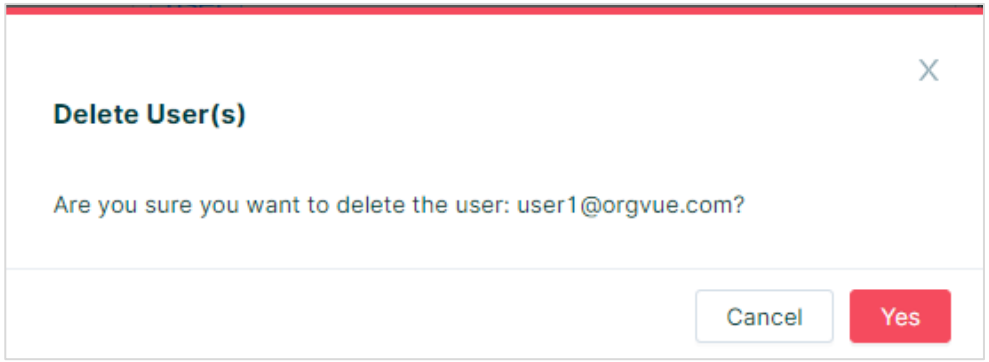


(fig a)



(fig b)

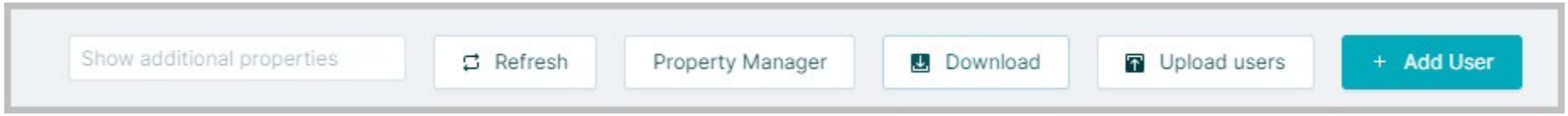
(fig c)

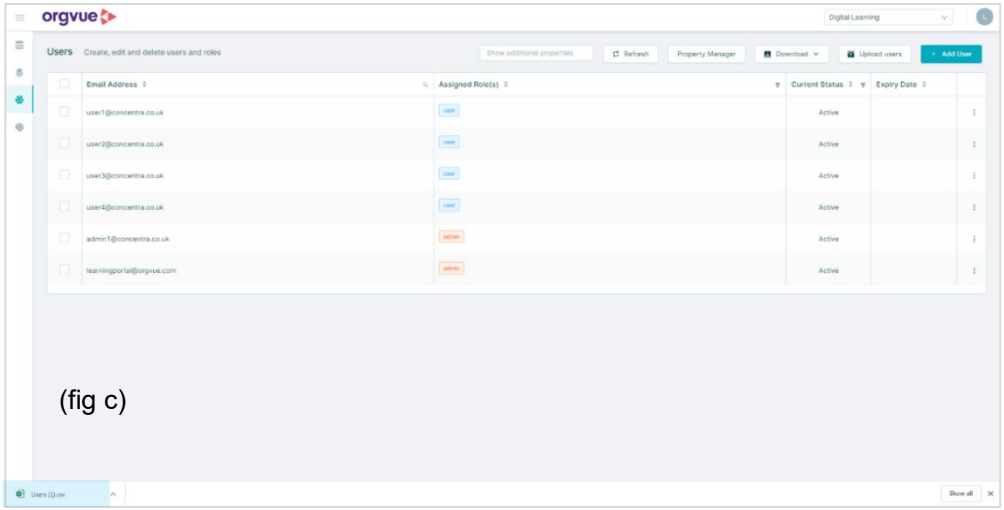


15.4 Download user list

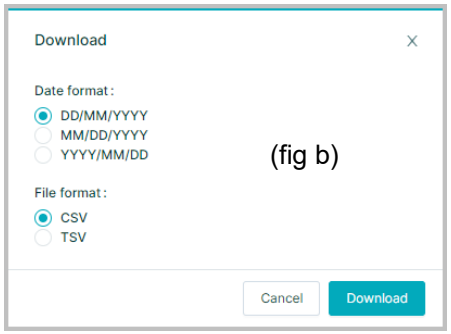
Tenant admins are able to perform bulk user management from the users tab in the settings application
Selecting **download** from the toolbar (fig a) the pop up menu (fig b) gives the option to **download** the list in either csv or tsv format
Selecting either format will commence the download and the file will be available in your browser window (fig c) and the download directory of your pc
If the user list contains any date format properties, the option to set the required date format for the download file will also be presented in the pop up window (fig b)

(fig a)





(fig c)



(fig b)

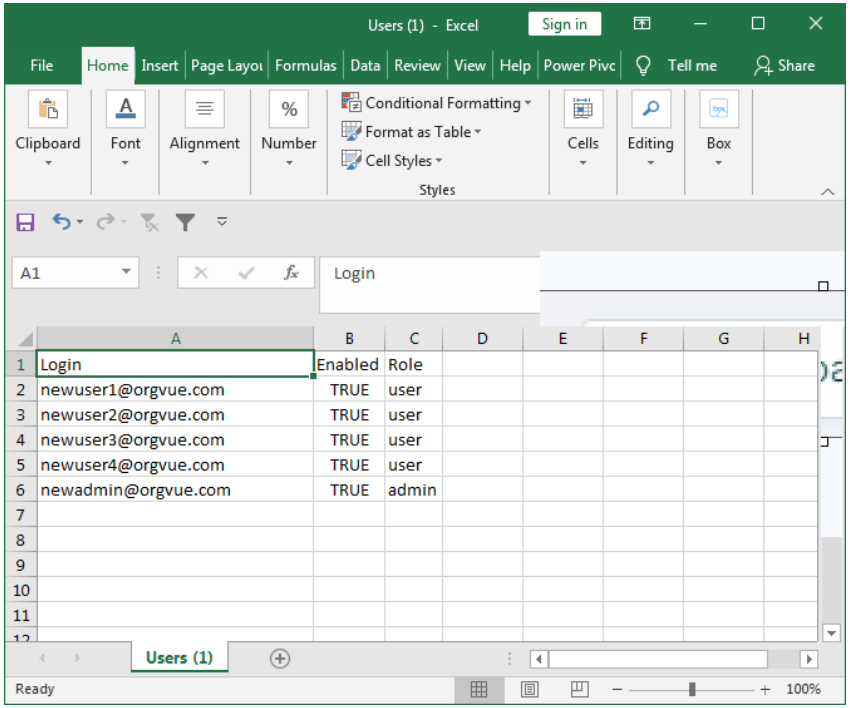
15.4 Upload user list

Tenant admins have the ability to upload users, in bulk, via csv or xlsx file. The file must have the following column headers and values (fig a):

- **Login** column must be available with valid email addresses. The upload process will use the Login column to merge
- **Enabled** column must exist with valid values of either TRUE or FALSE
- **Role** column must exist. Each user account must have the role of *'user'* or *'admin'*.

To start the upload wizard, select the **Upload Users** button on the toolbar (fig b)

(fig a)



(fig b)

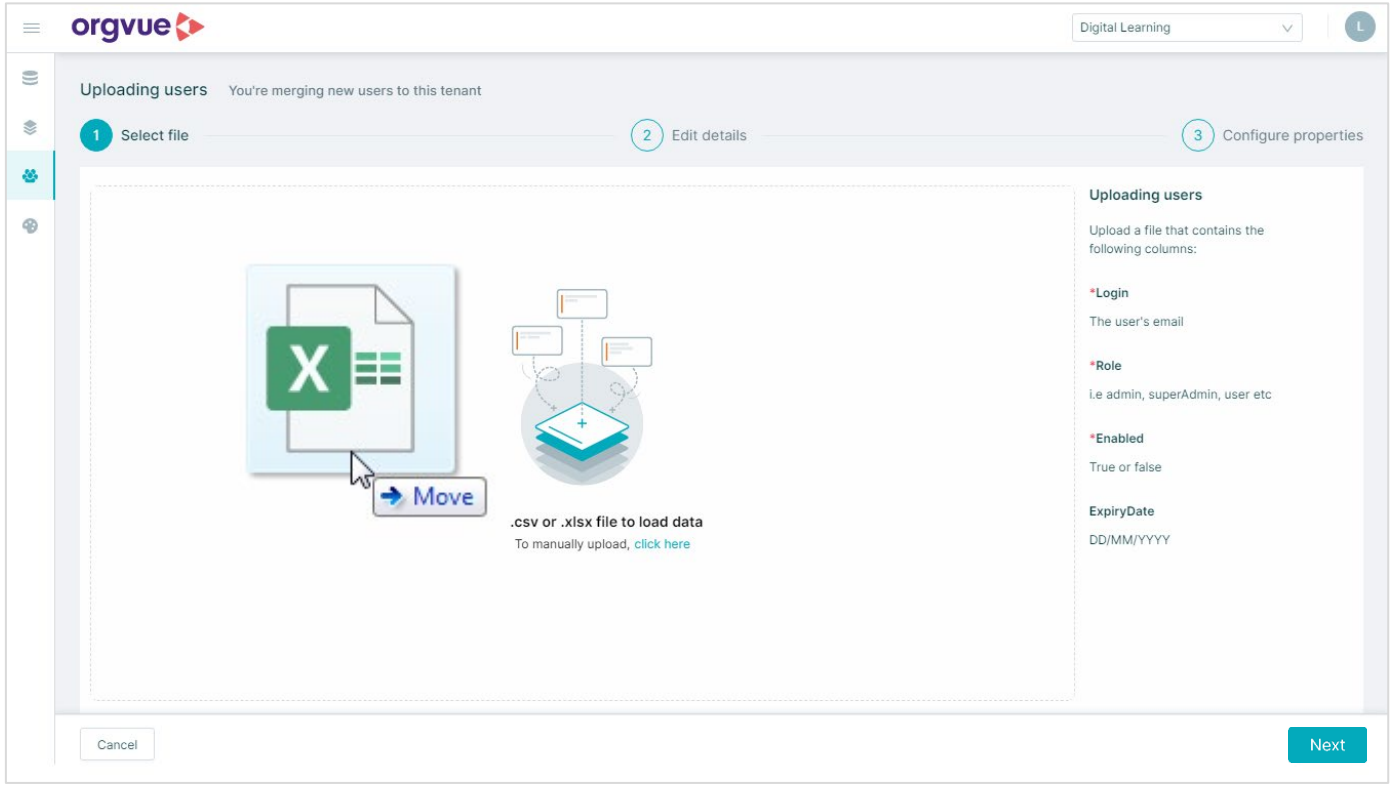
Continued on next page

15.4 Upload user list *Continued*

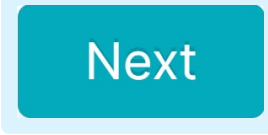
In the first step of the upload process, drag the xslx or csv file onto the upload area (fig a) or click to select the file from your pc. Any other file types will not be accepted and you will be unable to continue

Click the **next** button (fig b) to progress to step 2

(fig a)



(fig b)



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15.4 Upload user list *Continued*

Select operation (fig a) for the file being uploaded

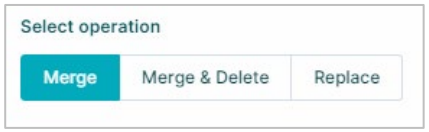
Options are:

- **Merge**: Merge the uploaded data into the target dataset, preserving all other data
- **Merge and replace:** Merge the uploaded data into the target dataset, deleting rows in the target dataset not in the uploaded data
- **Replace**:- Replace the target dataset with the uploaded data, deleting the rows and clearing columns not in the uploaded data

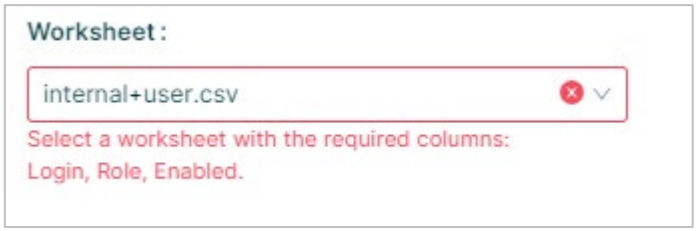
The detail from the uploaded file will be displayed (fig b) showing the number of properties and users in the upload

If a file is loaded that does not contain the correct headers, an error message will be displayed (fig c) and you will be unable to proceed. Click back to return to previous screen and upload a new file

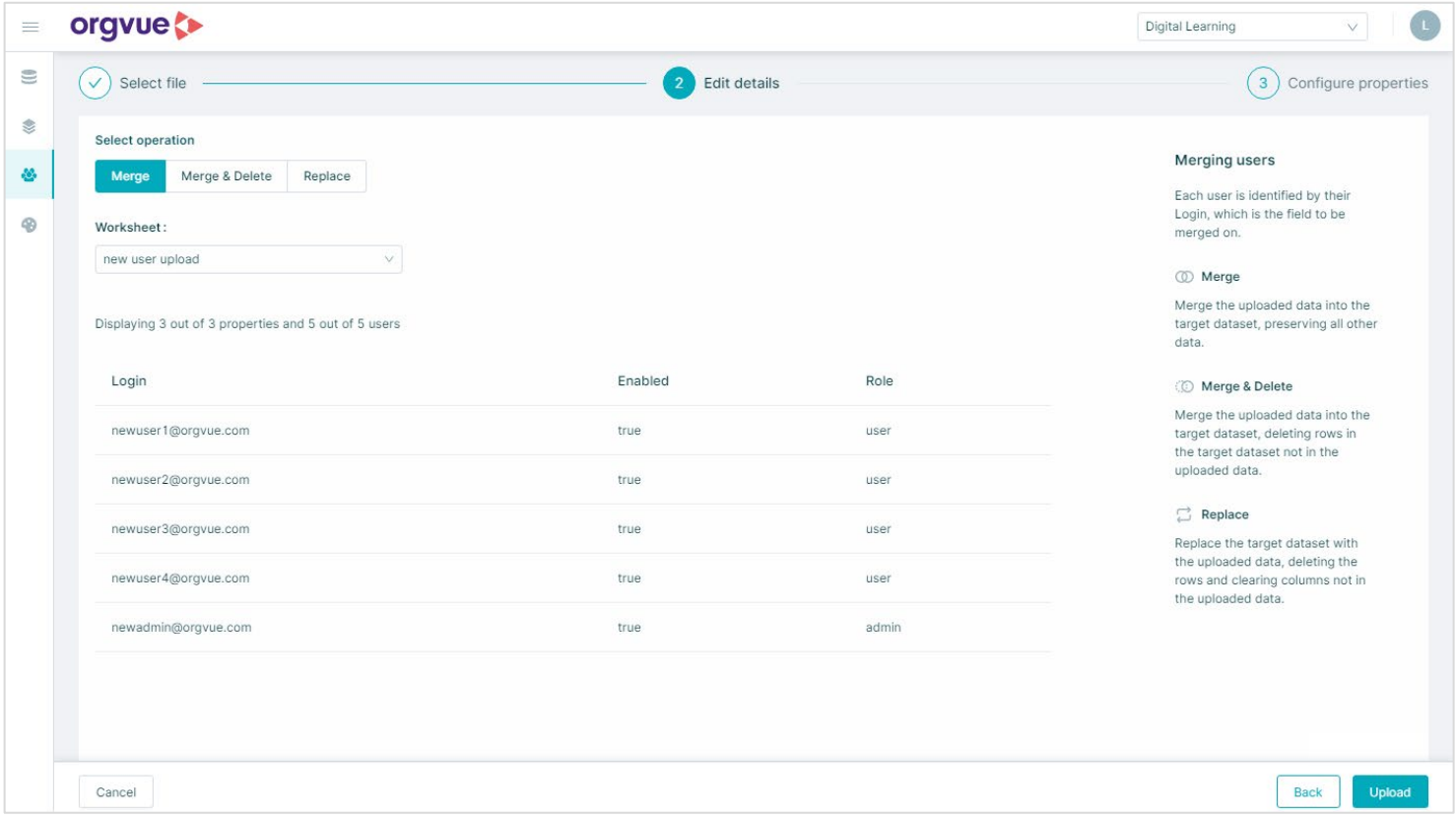
(fig a)



(fig c)



(fig b)



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15.4 Upload user list

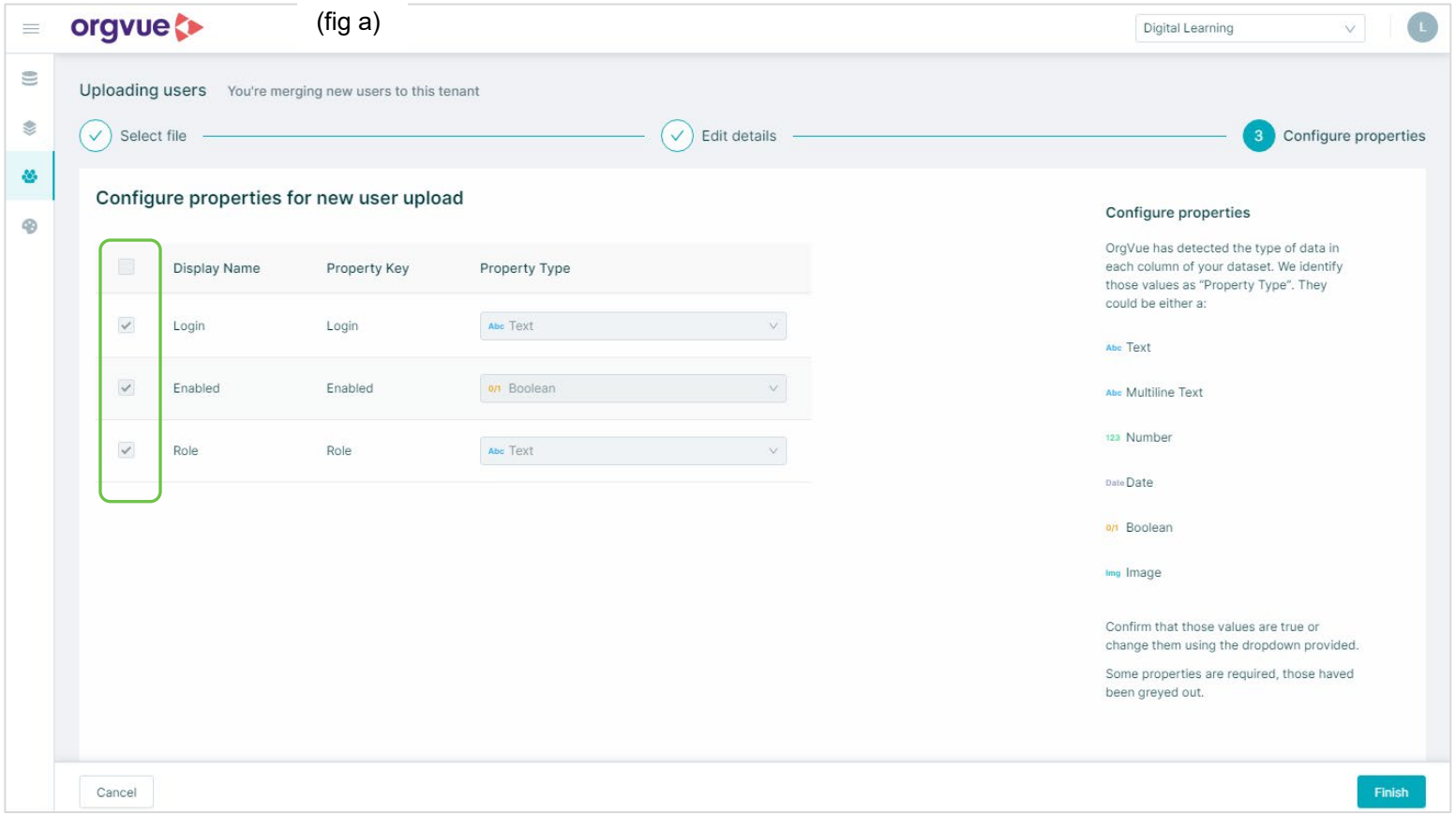
Continued

On the final screen (fig a) any properties present in the upload file that are not required can be unselected

Note *'Login'*, *'Enabled'* and *'Role'* are required fields and therefore the tenant admin cannot de-select these columns

Select **Finish** (fig b) to complete the process and return to the user list screen

(fig a)

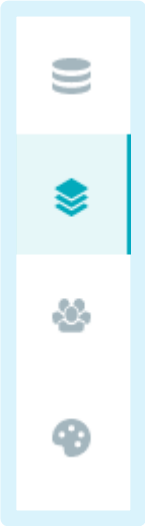


(fig b)

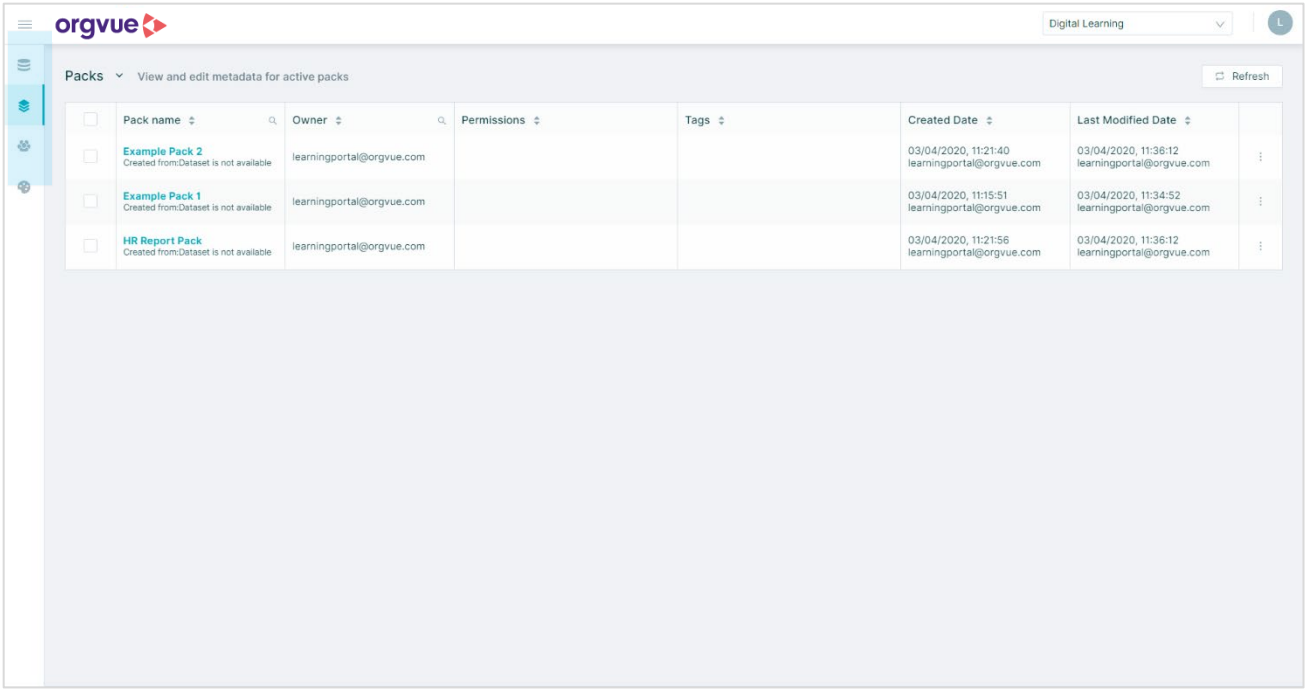
16.0 Pack Management

Packs are collections of slide visualisations linked to datasets in your tenant

The packs tab in the settings application is accessed from the side menu (fig a)



(fig a)



Any packs that you have created or have access to will be listed on the packs tab with the following details:

- Pack Name
- Owner
- Permissions
- Tags
- Created Date
- Last Modified Date

From this screen, you can conduct the following processes for any packs that you are the owner or have correct permission:

- View & edit permissions
- View & edit tags
- Edit metadata
- Preview slides
- Delete pack

16.1 Edit Packs

From the edit pack panel, you can:

- View & edit permissions

Pack permission settings allow you to specify which users are able to view or edit packs

- View & edit tags

Tags allow you to easily search and find packs in orgvue if you have large numbers of packs

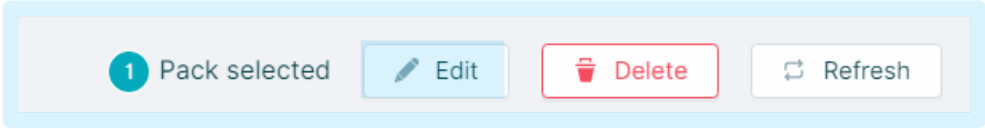
- Edit metadata

Editable metadata fields are **Pack name** and **owner**

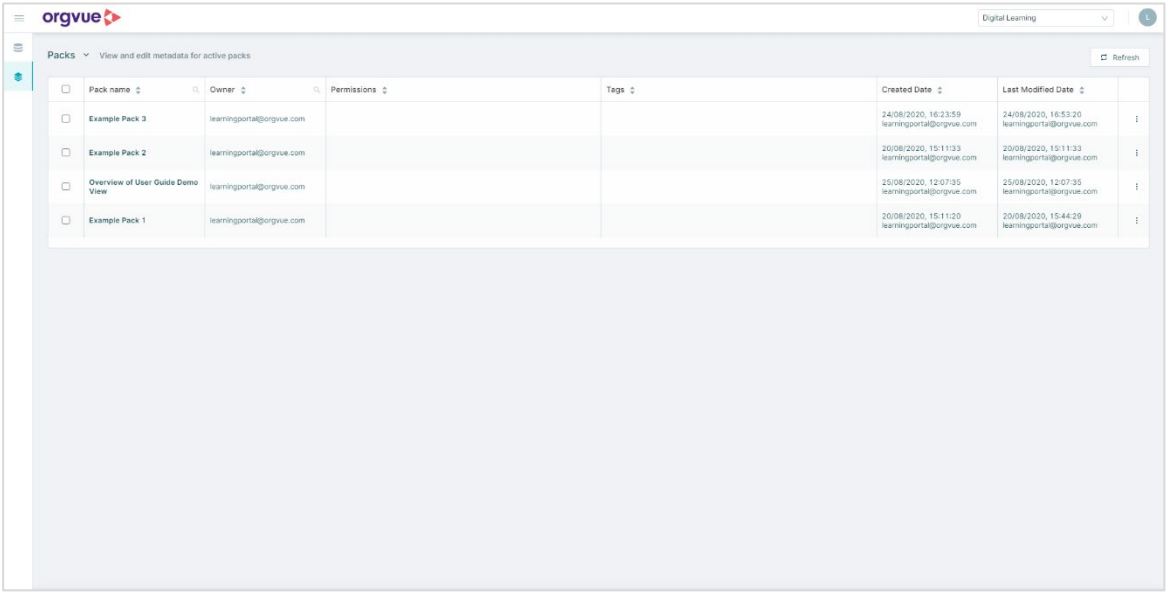
To open the edit **pack window,** either select the pack using the **select box** and the click **edit** (fig a) or select the more details button (fig b) for the required pack and select edit pack from the menu (fig c)

Note: Any user with the role of admin will be able to view and edit all packs regardless of any permission settings

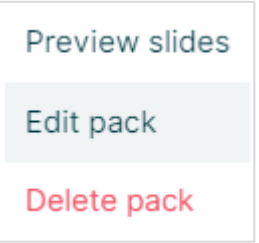
(fig a)



(fig b)



(fig c)



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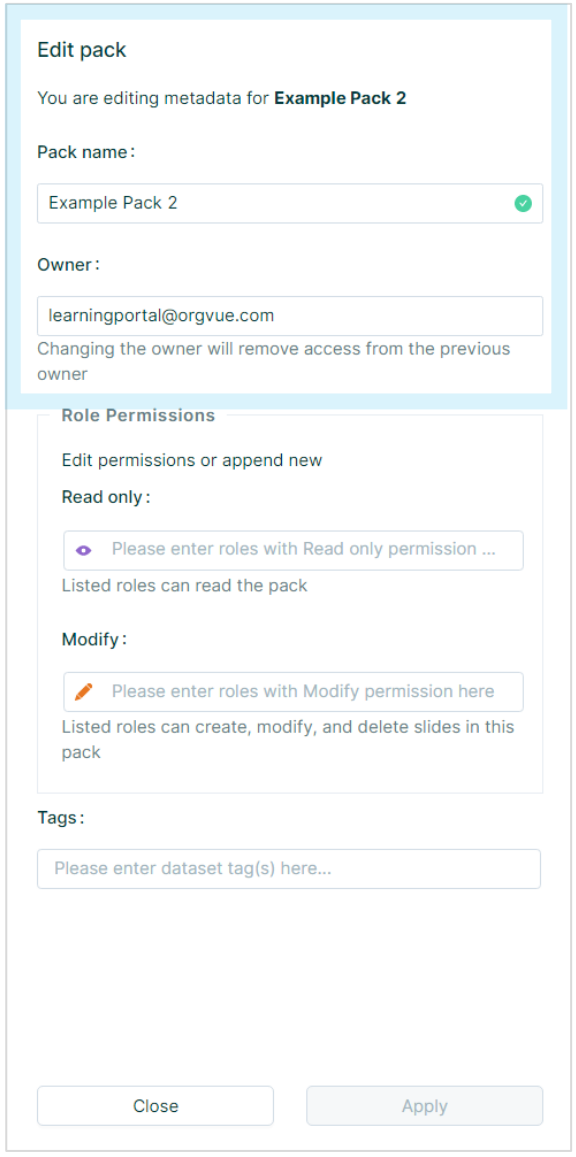
16.1 Edit Packs *continued*

The following metadata fields on the edit pack window may be edited:

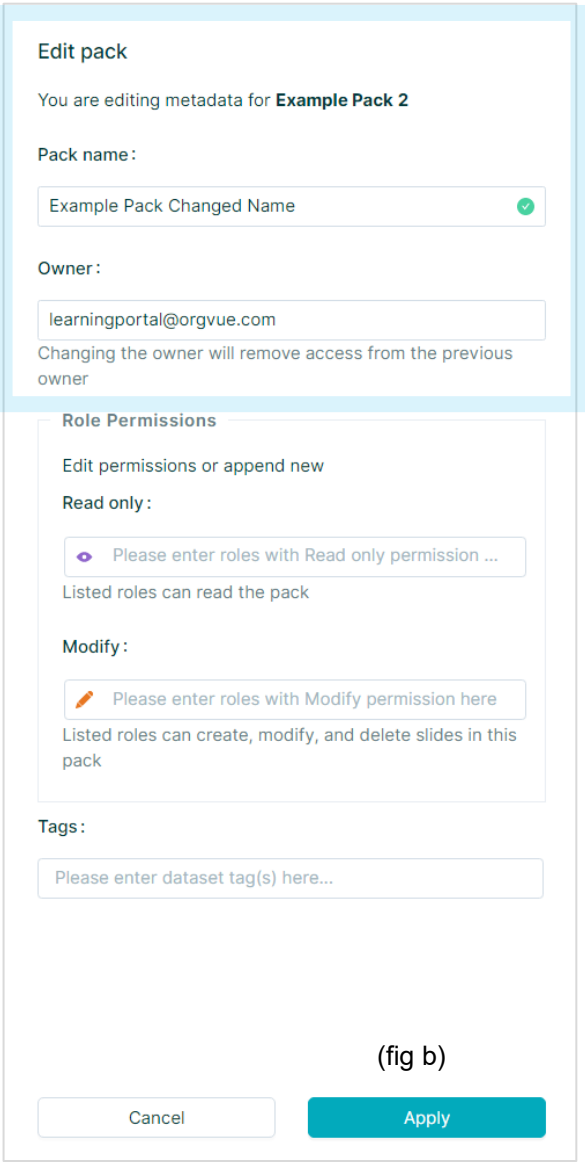
- Pack Name
- Pack Owner

To edit either field, simply click into the field and type the required change (fig a)

As soon as any change is made to either field, the **Apply** button will be shaded in teal (fig b). Click this button to apply the change



(fig a)



(fig b)

Continued on next page

16.1 Edit Packs *continued*

To be able to edit permissions for a pack you must be either:

- The pack owner
- Admin

Permissions for packs can be set to define which roles are able to:

- view your packs
- edit your pack

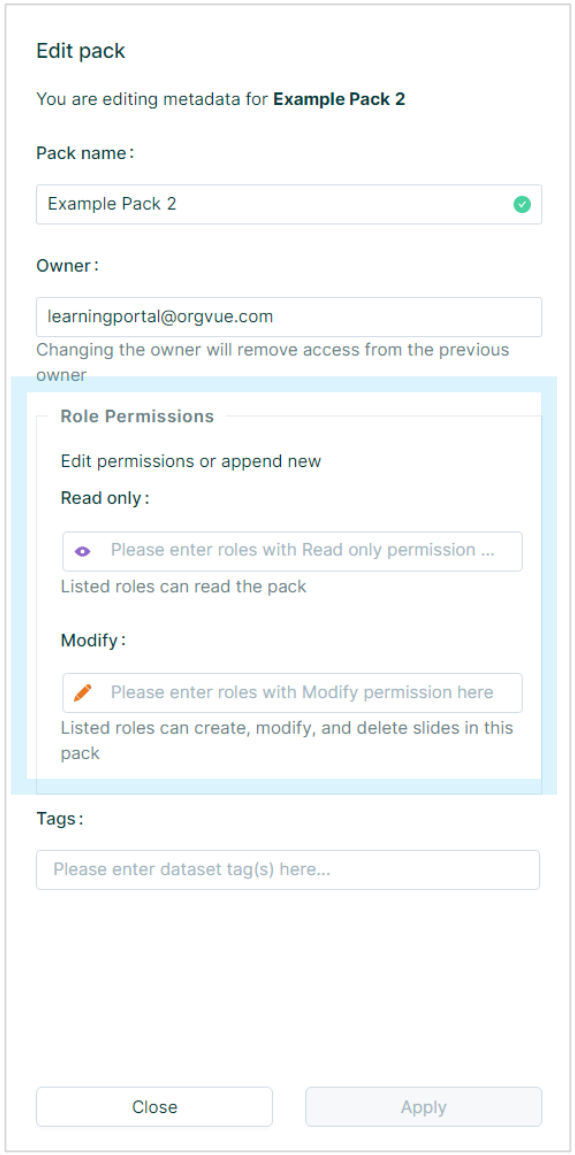
Note: any role that has permission to edit your pack will also be able to view it

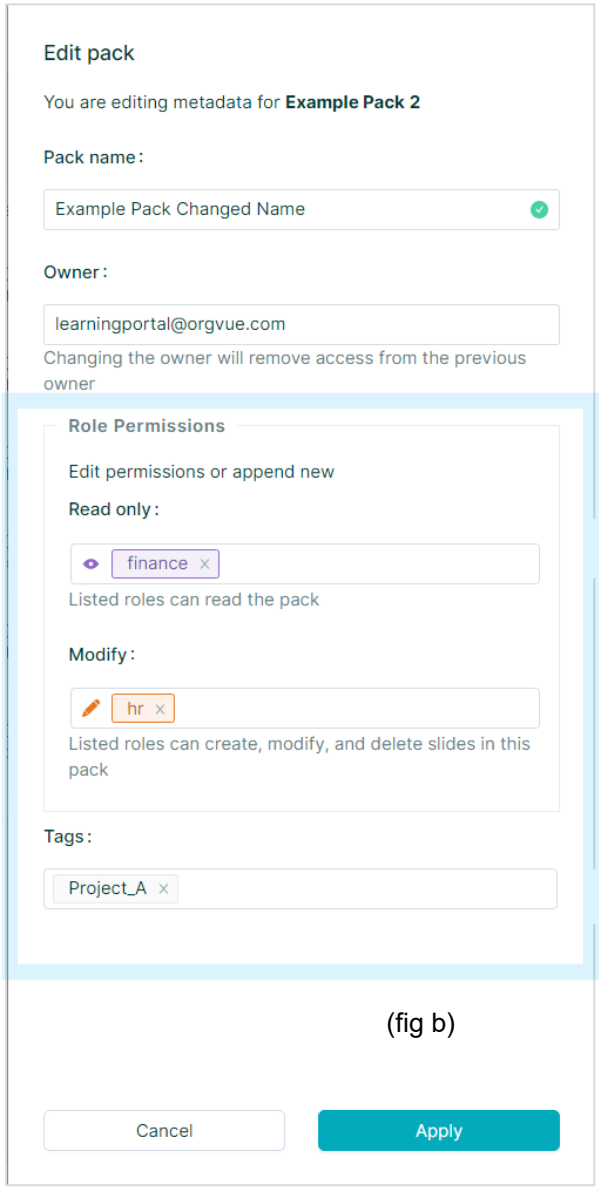
The roles entered into either cell will also need to be assigned to user profiles following the detail in 12.2 Edit a user

To add a role to either the view or edit permissions, type the role name into the required permission field (fig a) and click apply (fig b)

Tags to aid searching for packs or grouping them can also be entered into the Tag field (fig c), but it should be noted that Tags do not affect any permissions set

Continued on next page





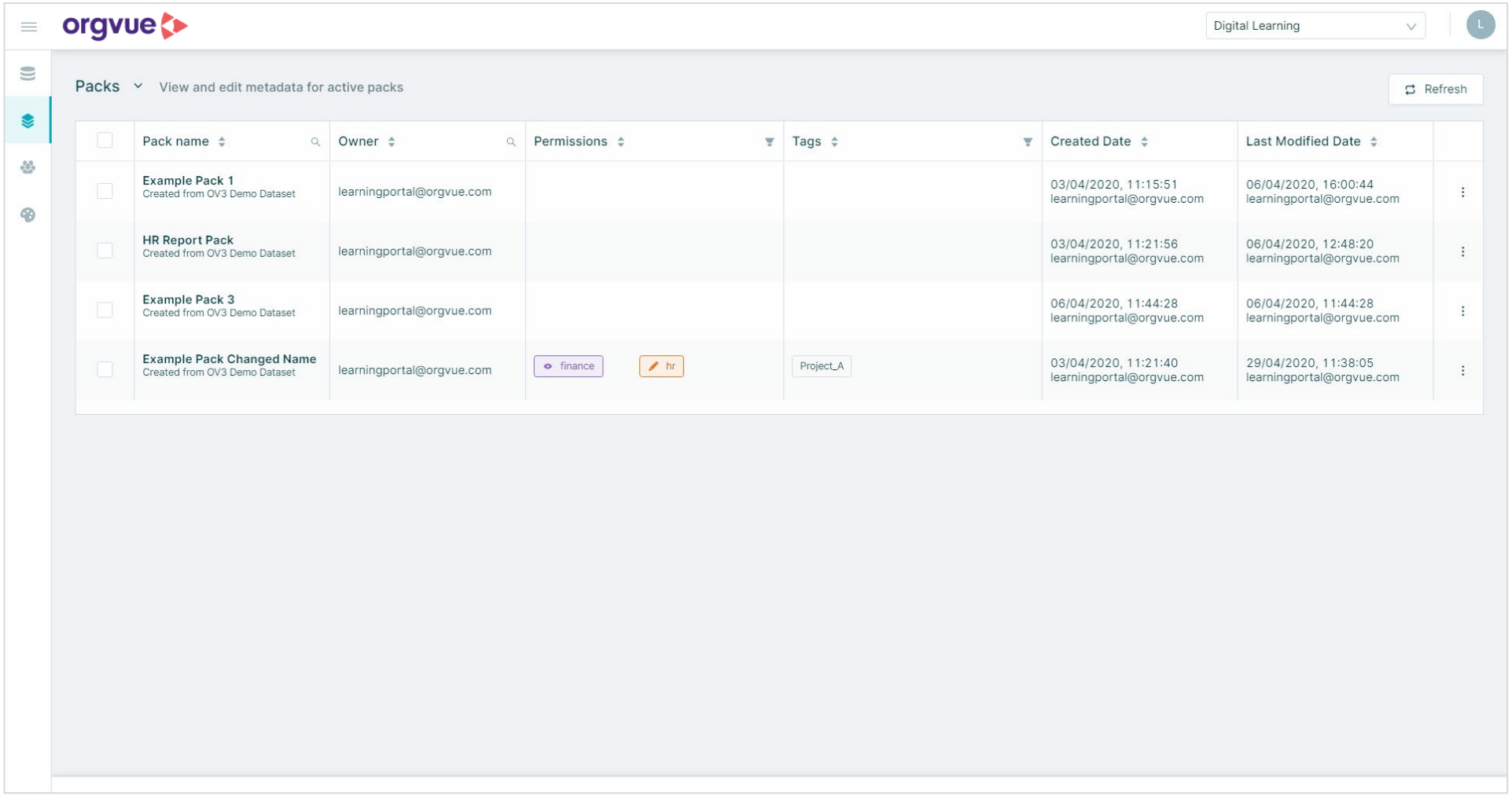
(fig a)

(fig c)

(fig b)

16.1 Edit Packs *continued*

Once applied, the permission icons, tags and revised pack names can be view on the packs tab

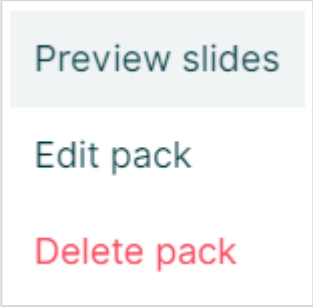


16.2 Preview Packs

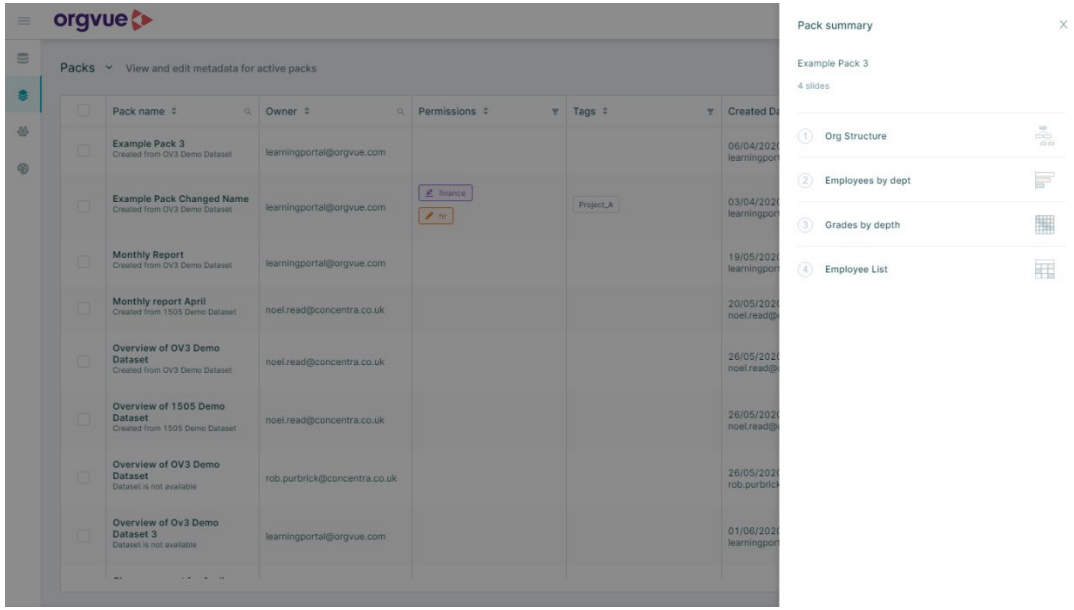
Whilst it is not possible to open packs from the settings screen, the slides can be previewed so that you can ensure the correct pack is chosen before using the Edit or Delete functions
To access the preview, select the more details menu for the required pack (fig a) and then the preview slides option (fig b). The side panel will open (fig c) to view the details of the slides including total number of slides in pack and the names of each slide along with the slide type (fig d)

(fig a)

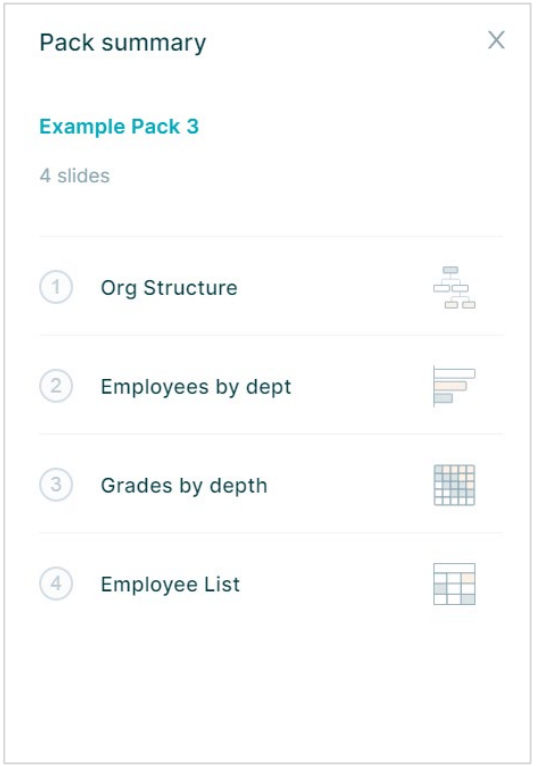
(fig b)



(fig c)



(fig d)



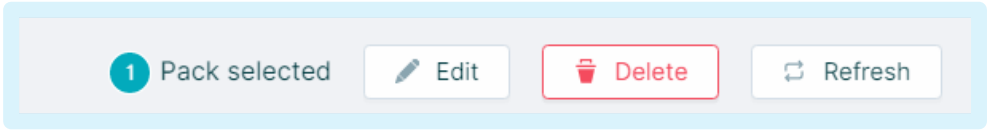
16.3 Delete Packs

Note: To be able to delete a pack you must be either the pack owner or Admin

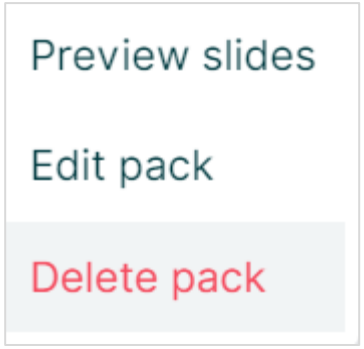
Any unwanted packs can also be deleted from the pack management screen. To delete a pack, either select the pack(s) and then the delete button at the top right of the screen (fig a) or the more details button for the required pack and then select delete pack from the pop-up menu (fig c)
Multiple packs can be deleted together by selecting several packs first and then the delete button (fig a)
After pressing the delete button, a confirmation message will appear to confirm the deletion (fig d)

(fig b)

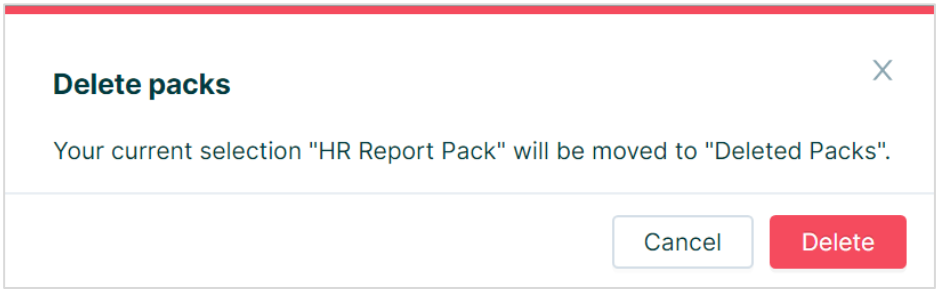
(fig a)



(fig c)



(fig d)



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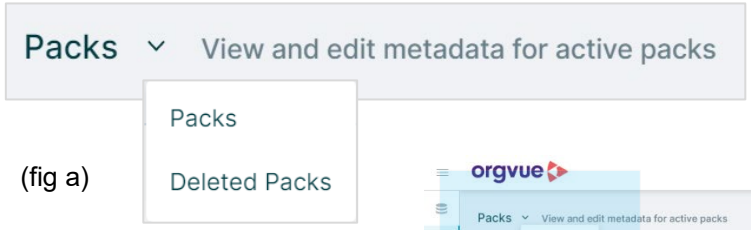
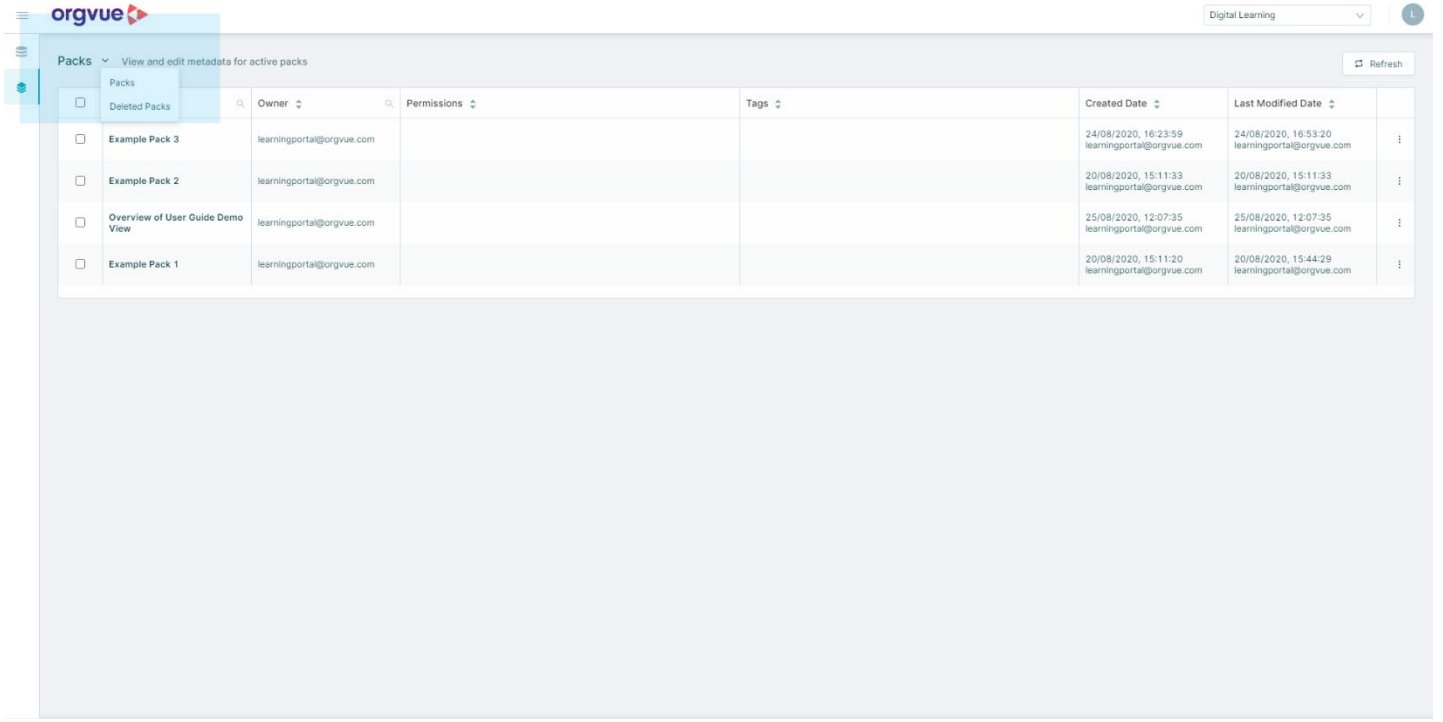
16.3 Delete Packs *continued*

Deleted packs are shown on the deleted packs screen. To access, use the drop-down option on the packs screen (fig a) to switch from active packs (fig b) to deleted packs (next page)



(fig a)

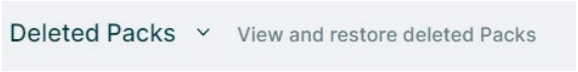


(fig b)

Continued on next page

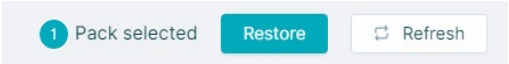
16.3 Delete Packs *continued*

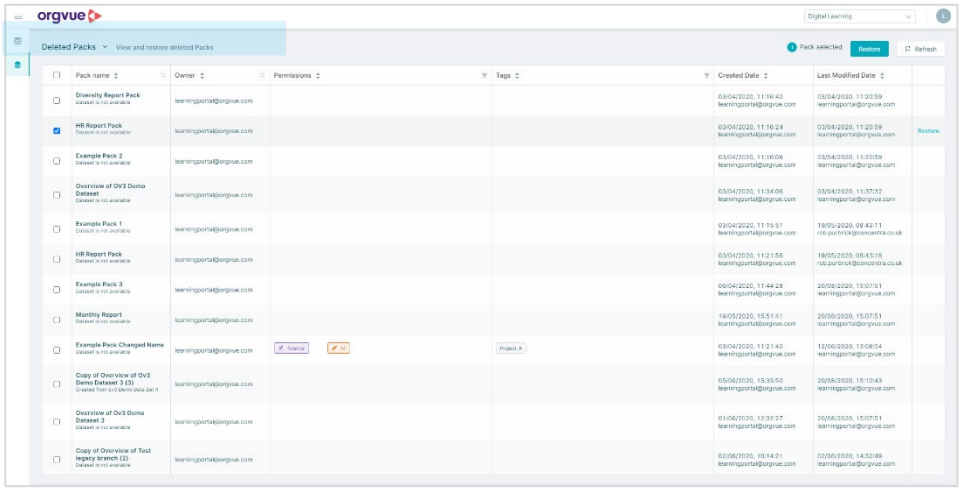
Any deleted packs can be restored from the **deleted packs** screen (fig a) by either selecting the pack and clicking the **restore** button (fig b), or hovering over the right hand column of the required pack and click the **restore** button that appears (fig c)
Clicking restore will open a confirmation message (fig d), select **restore** to complete process

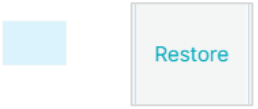


(fig a)

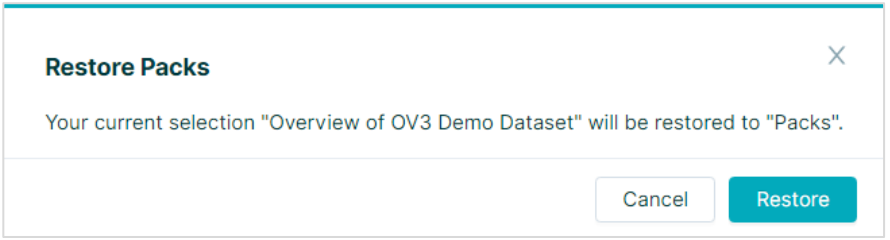
(fig b)







(fig c)



(fig d)

17.0 Color Palettes

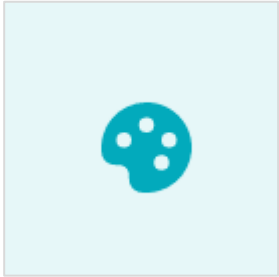
Selecting the color palette icon (fig a) on the side menu toolbar will display the Custom colors screen (fig b)

This allows users to create palettes and then use these palettes in the Orgvue 3 platform

Note: To view the data on this screen you will need to have the role of Admin in your profile

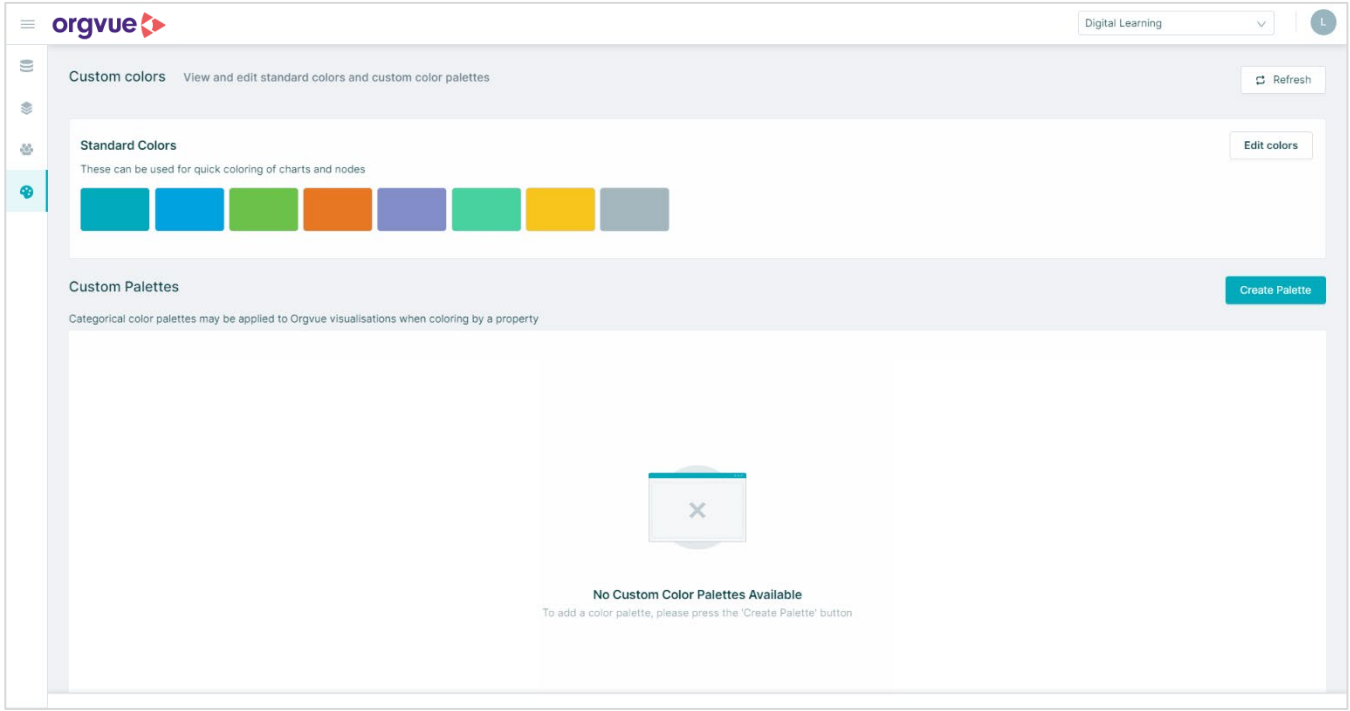
From this screen it is possible to:

- Create a custom palette
- Edit an existing custom palette
- Delete a custom color palette
- Edit Standard colors



(fig a)

(fig b)



17.1 Create custom color palette

To create a palette, click the **Create Palette** button (fig a).

This will open a dialogue box (fig b) for you to enter:

- Palette Name
- Color selector

Colors can either be selected by directly entering the hex code into the # box (fig c) or by clicking the smaller square color indicator box to open a color picker window (fig d)

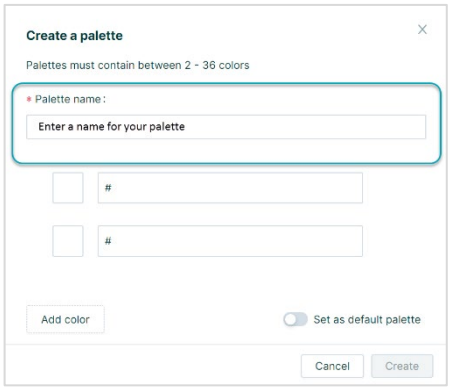
Additional colors can be added to your palette from the minimum 2 up to the maximum of 36 colors for a single palette using the **Add Color** button (fig e)

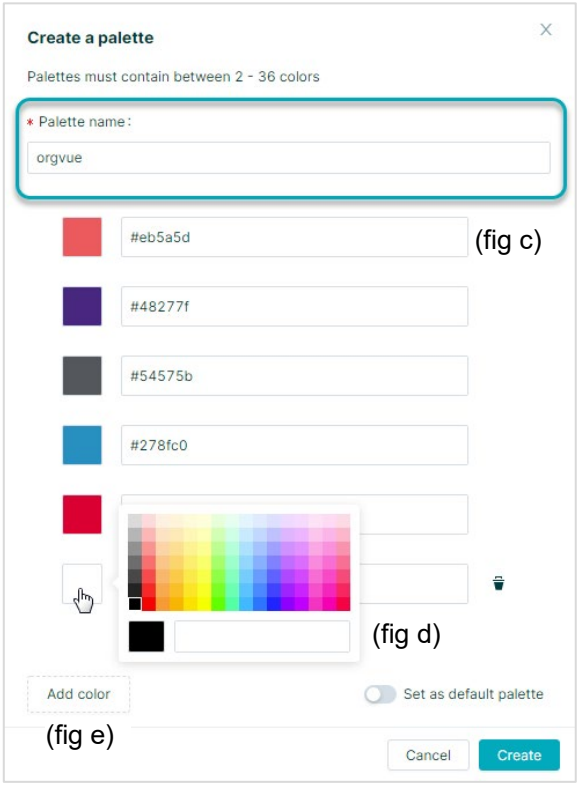
Once all required colors have been added to your custom palette, click the **Create** button to finalise the creation process

The custom palette will be available to use in the platform within the Categorical color palettes (fig f)

(fig a)

(fig b)

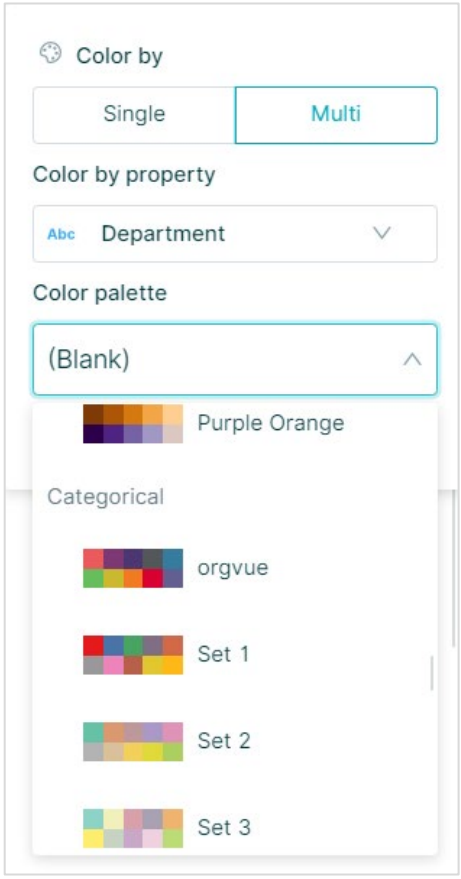




(fig c)

(fig d)

(fig e)

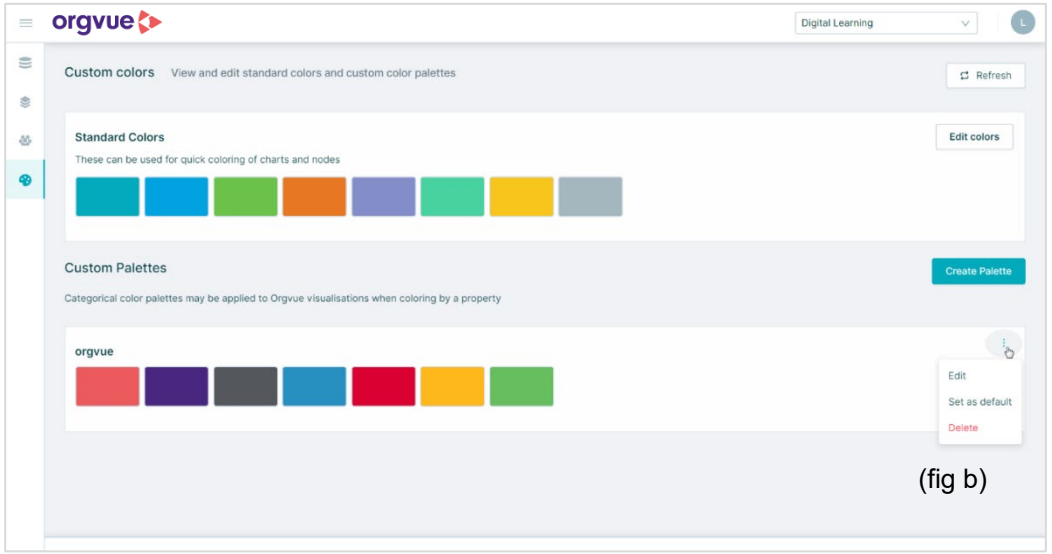


(fig f)

17.2 Edit custom color palette (New)

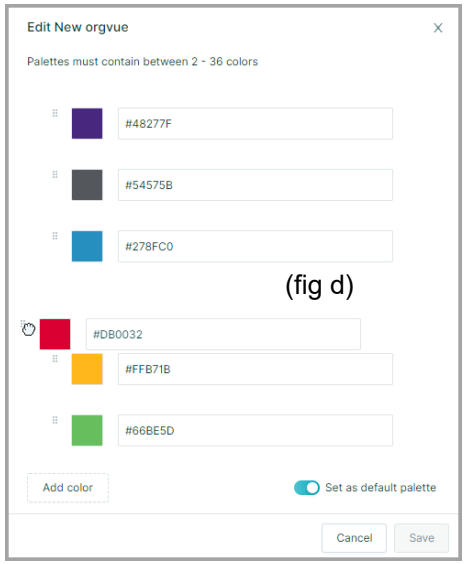
Any custom palettes that have been created will be shown on the Custom Color screen (fig a). Clicking the more details menu button allows you to select the edit option (fig b)
This will open the edit window to allow you to amend, add or delete any of the colors on your palette (fig c)
Clicking on the 6 dots icon by any color will allow you to drag the color order to re arrange the palette (fig d)
Click the **Save** button to complete the edit process

(fig a)



(fig b)

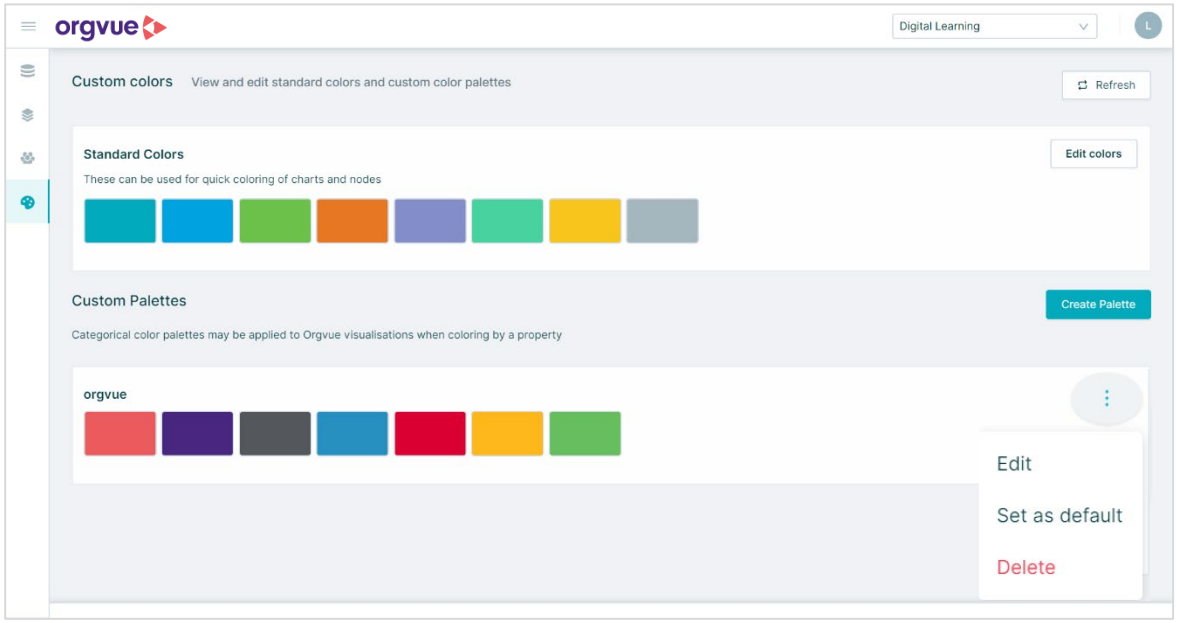
(fig c)



(fig d)

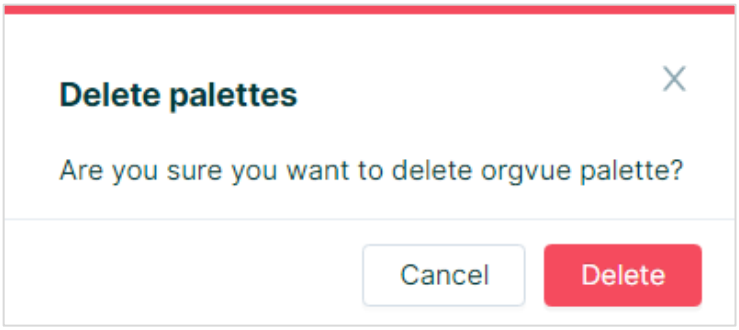
17.3 Delete custom color palette

Any custom palettes that have been created and are no longer required, can be deleted by clicking the more details menu on the palette and selecting the **Delete** option
This will open a confirmation message (fig b), click **Delete** again to finalise the deletion process



(fig a)

(fig b)



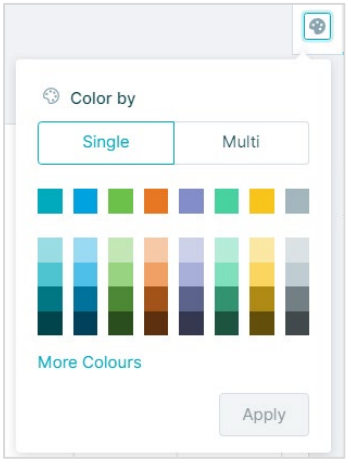
17.4 Edit standard color palette

The standard color palette is used in the platform when choosing to **color by** a single color. And the palette will be shown first when opening the **color by** panel (fig a) with the option to view more colors

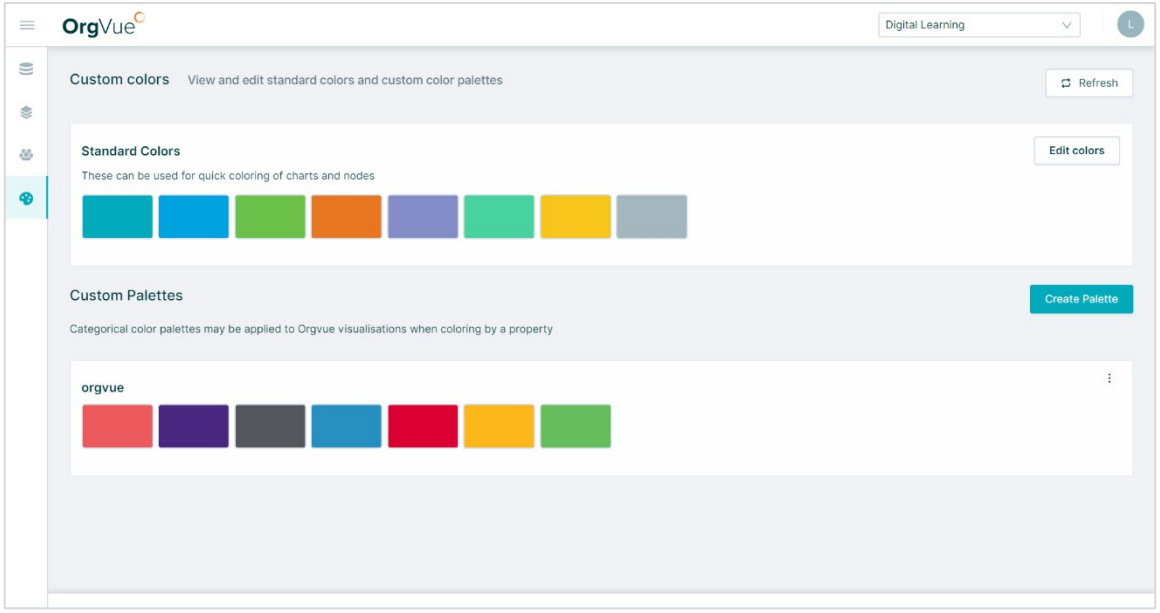
The standard palette will exist with a default set of colors and must contain between 1 to 8 colors

To edit the colors on this standard palette, click the **Edit Colors** button (fig b)

This will open the edit window (fig c) and enable you to amend the colors that appear on this palette

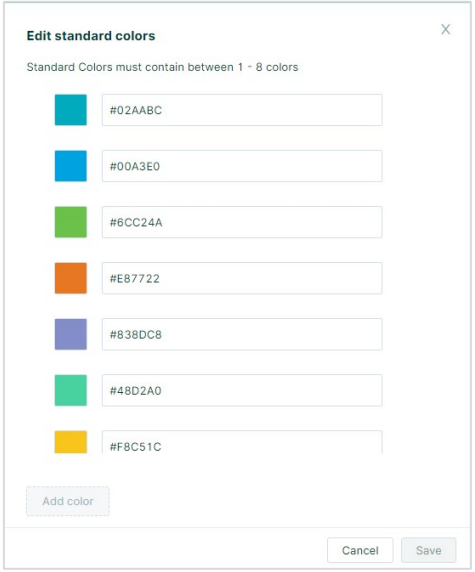


(fig a)



(fig b)

(fig c)



18.0 Links dataset

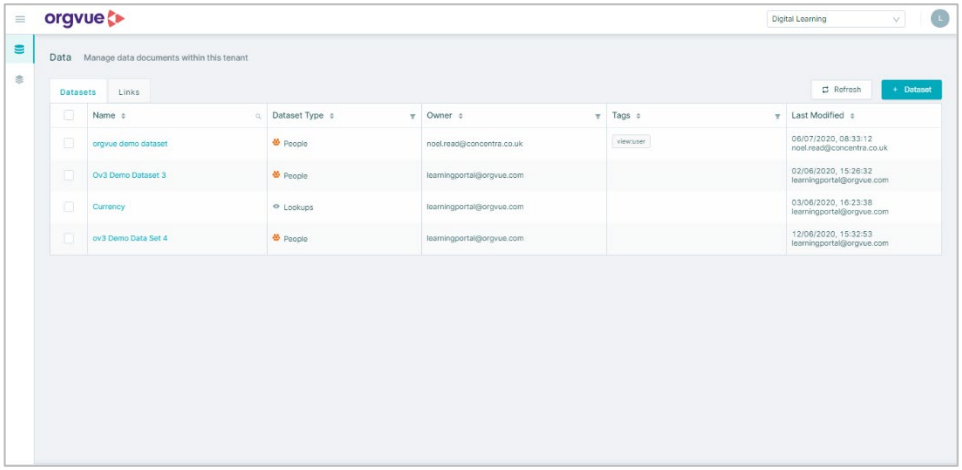
Settings allows users to link two datasets together creating a links dataset in the process. Once the links dataset is created, it can be managed and edited through settings, which provides the ability to update and delete the links dataset.
Links datasets can be accessed by selecting the dataset option from the side menu bar (fig a) and then the links tab on the dataset screen

From this screen it is possible to

- Create a link dataset
- Upload a link dataset
- Edit a link dataset

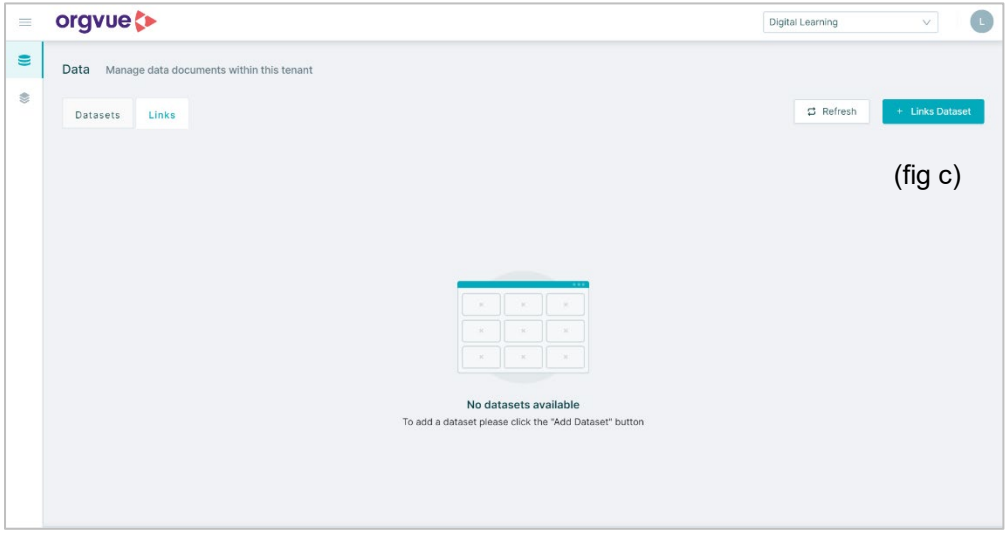
(fig a)

(fig b)

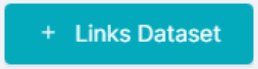


18.1 Create a link dataset

To create a link between two datasets, a new empty link dataset must be created From the links tab select the **+links dataset** button (fig c)



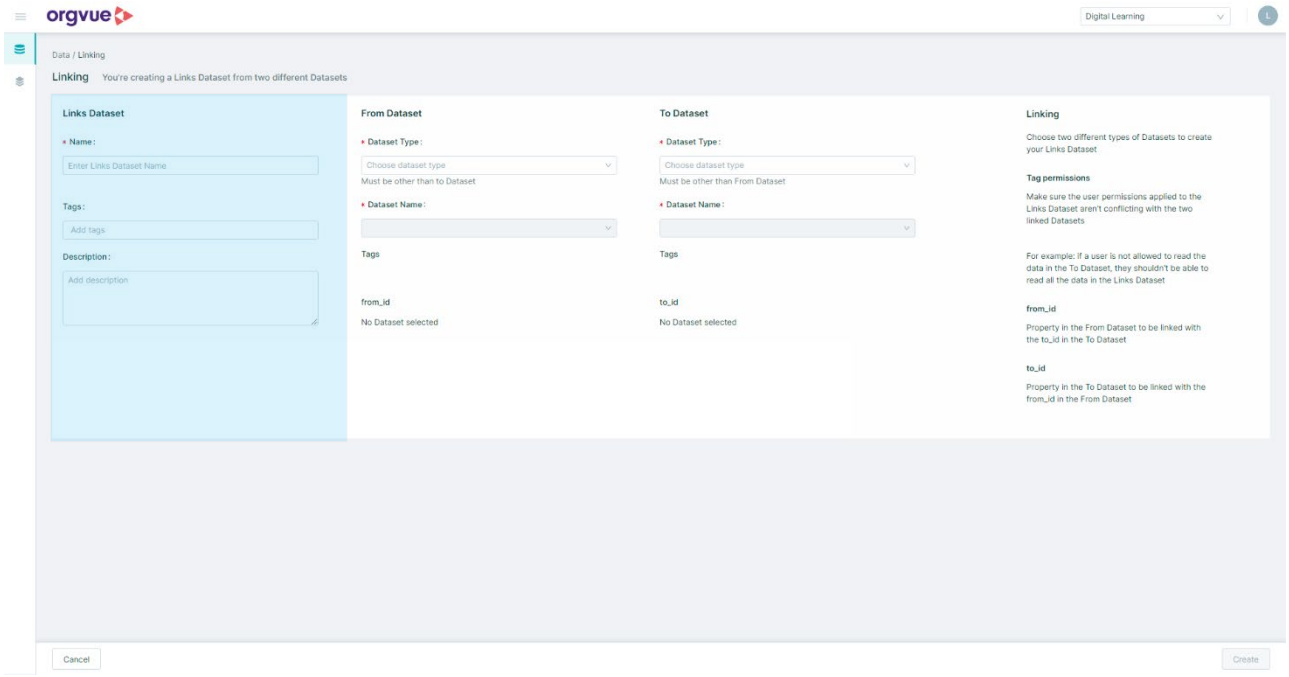
(fig c)

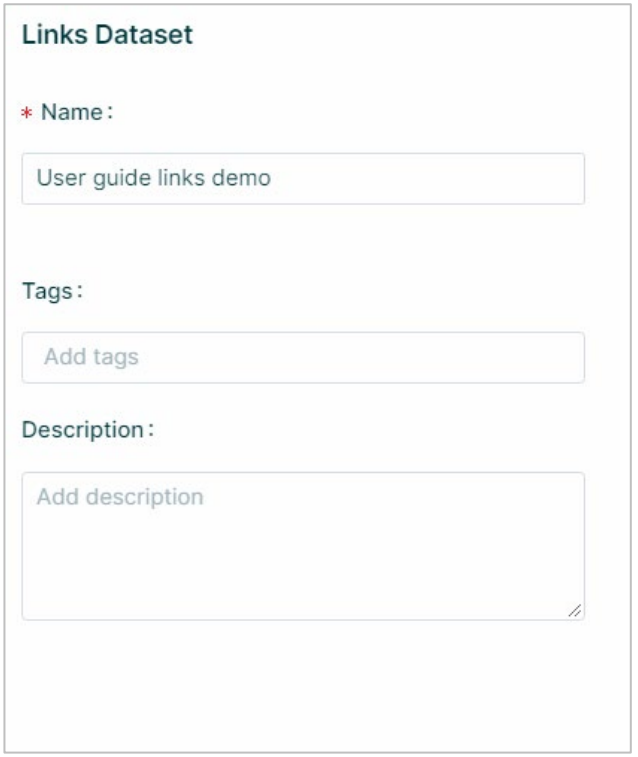


18.1 Create a link dataset *continued*

Once **+ Links Dataset** has been selected, you will navigate to the create links dataset page where you will be required to enter the following information (*mandatory field):

- *Name: The name of the link dataset which cannot have the same name as an existing links dataset that the user has access to
- Tags (left hand side): Dataset tags applied to the new links dataset that can be used for permissions or grouping of datasets
- Description: User specific description that can be entered if required





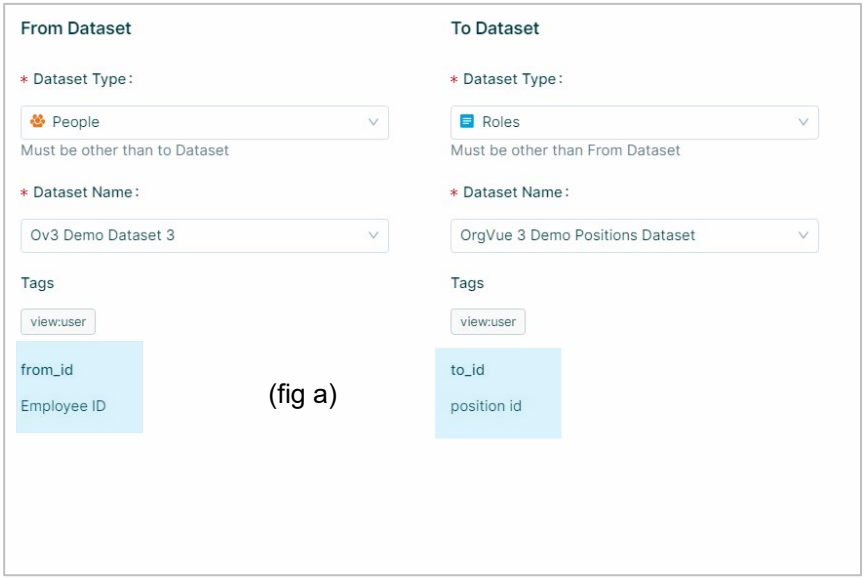
18.1 Create a link dataset *continued*

(*mandatory field):

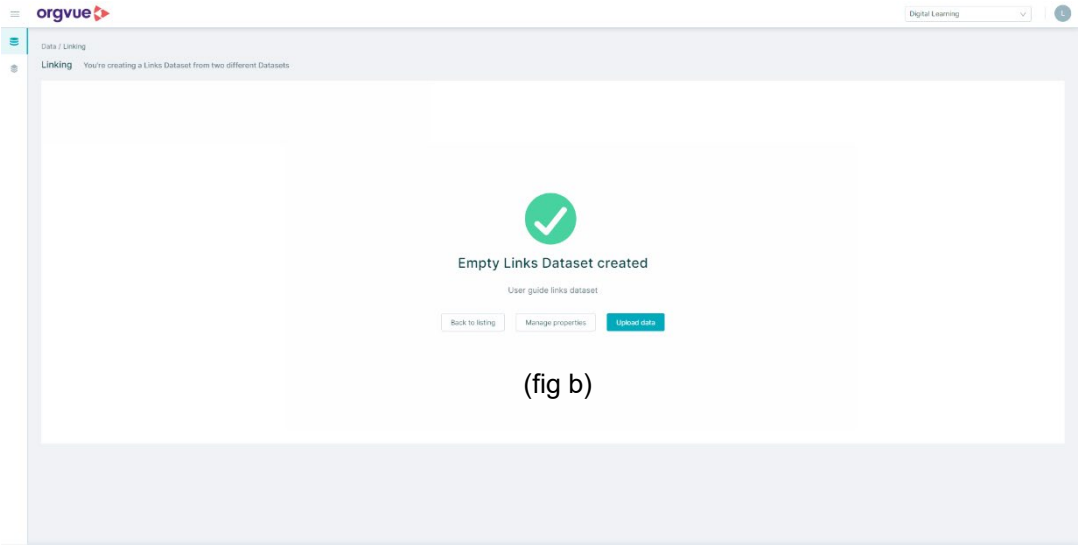
From Dataset and To Dataset: The datasets that are to be linked together

- *Dataset Type: The type of dataset that is to be linked together. Users cannot link two datasets together of the same type. Additionally, the following types are unable to be linked together: Links, Trees, Survey, Users, Dimension, Reporting, Analytics, Usage and Configuration
- *Dataset Name: Filtered based on the dataset type, returns the list of all the datasets under the selected type the user has access to
- Tags (under from and to dataset): The tags applied to the datasets that are being used to be linked. Helps users to identify the permissions across all datasets involved in the linking
- from_id & to_id: Represents the expected data for the **from_id** and **to_id** properties that are required during the data load (fig a)

Once these fields have been completed, selecting the create button completes the creation of the link between the two datasets (fig b)



(fig a)



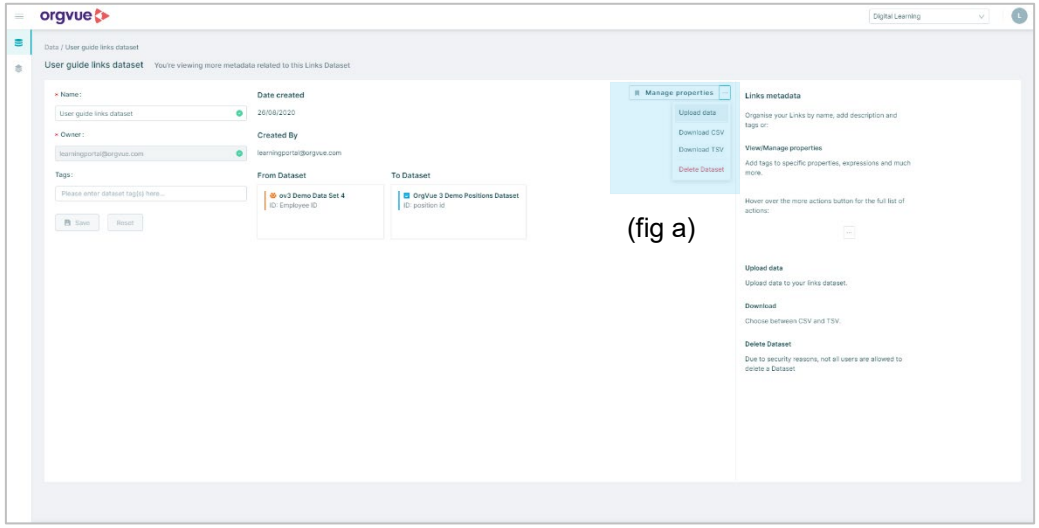
(fig b)

18.2 Upload a link dataset

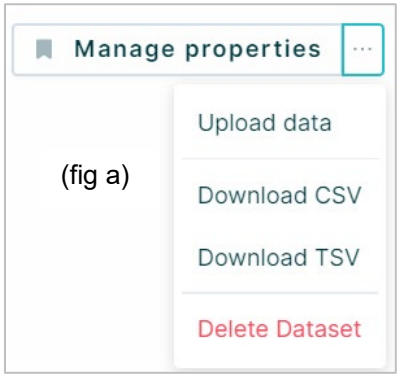
Once the link dataset has been created, it is then possible to upload the links data from a file. This may be done either via the edit metadata page or from the confirmation of created links dataset page

To start the upload process, click the upload data button (fig a) this will open the upload links page. Drag and drop or click to select the file for upload in either CSV or XLSX format

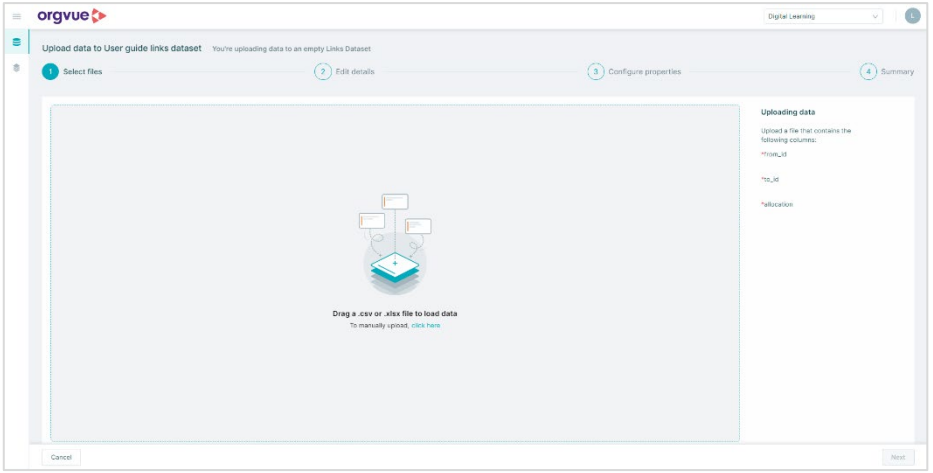
Upload file should contain the following properties **from_id**, **to_id** & **allocation**



(fig a)

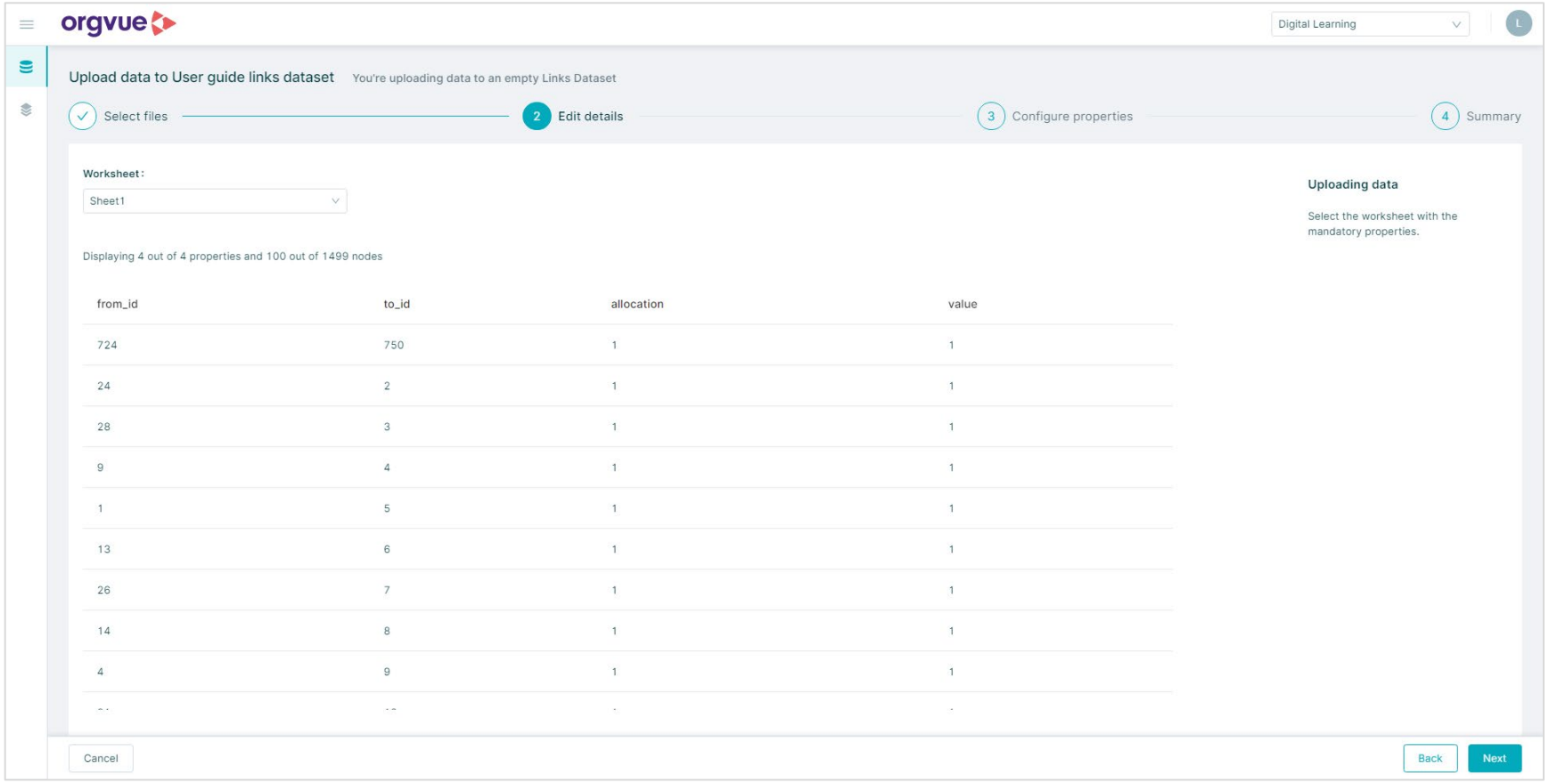


(fig a)



18.2 Upload a link dataset *continued*

Once a file has been uploaded, the worksheet will be validated for the correct columns and if the file doesn't have the required columns, it will stop the user from progressing and inform them there are missing properties
Confirmation will also be provided of the number of properties and nodes in the upload file



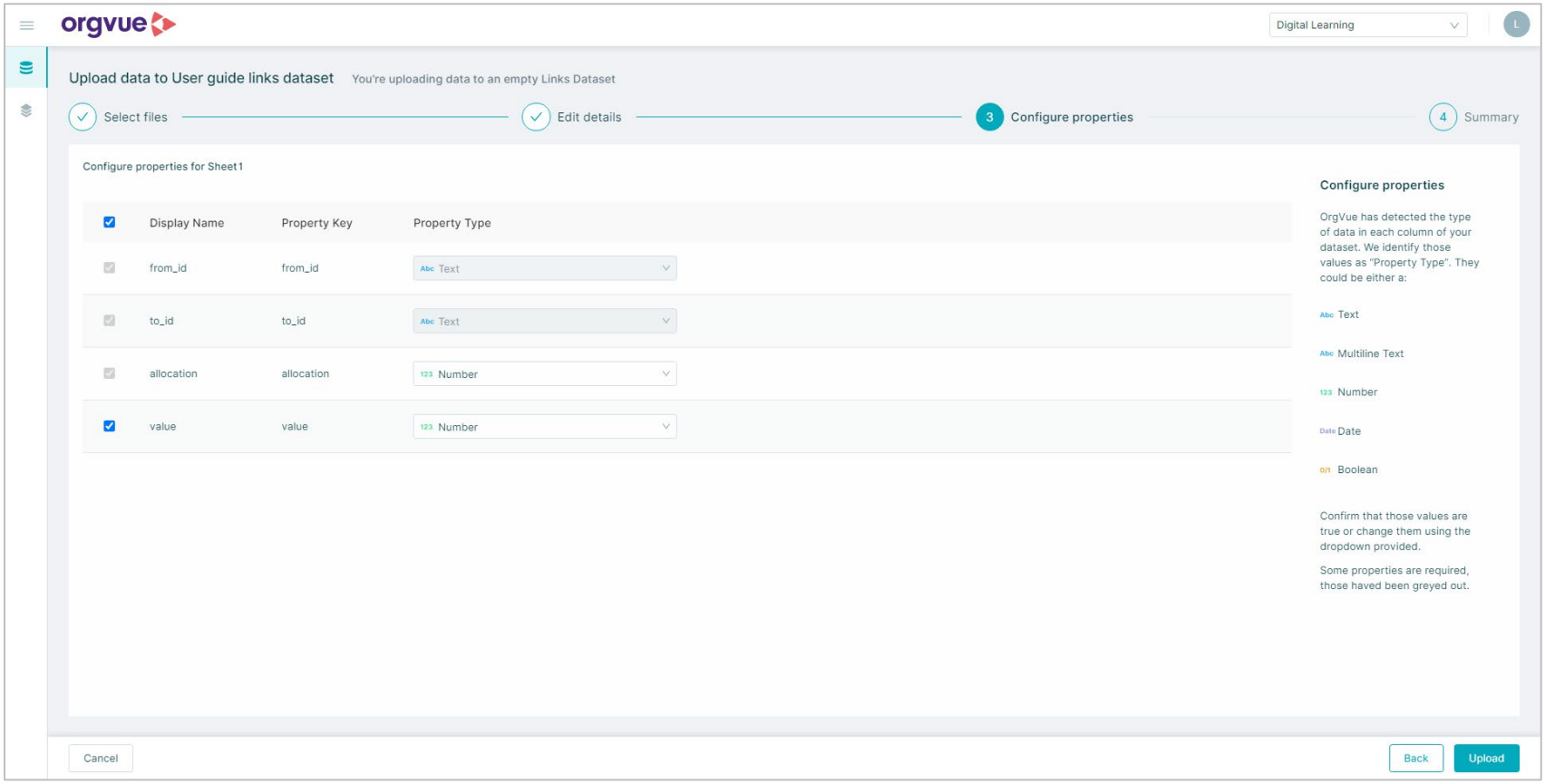
18.2 Upload a link dataset *continued*

In stage 3 of the data upload process, it is possible to select or deselect any additional properties that are present in the upload file and also change the property type for the additional properties

The **from_id** & **to_id** properties are mandatory and cannot be deselected and property type cannot be changed

The allocation property is also mandatory and cannot unselected in stage 3, but the property type can be changed if required

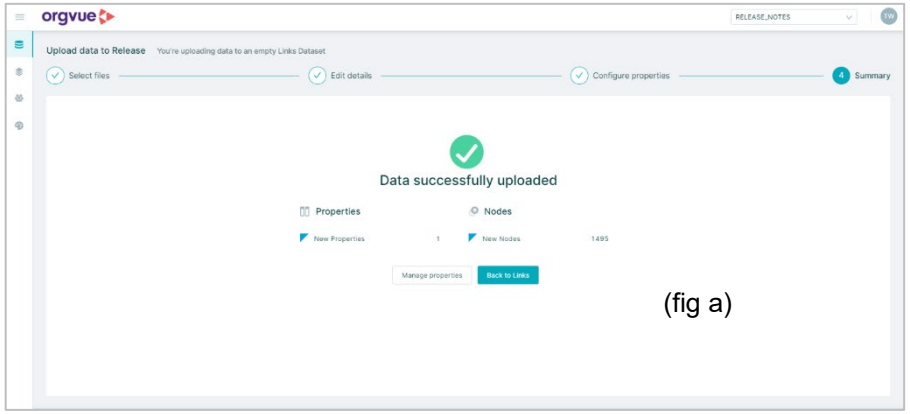
Once any changes have been made, select the upload button to complete the process



18.2 Upload a link dataset *continued*

Once the user has selected upload in stage 4 of the data upload process, they navigate to a **success** page and have the option to manage properties or go back to links listing(fig a)

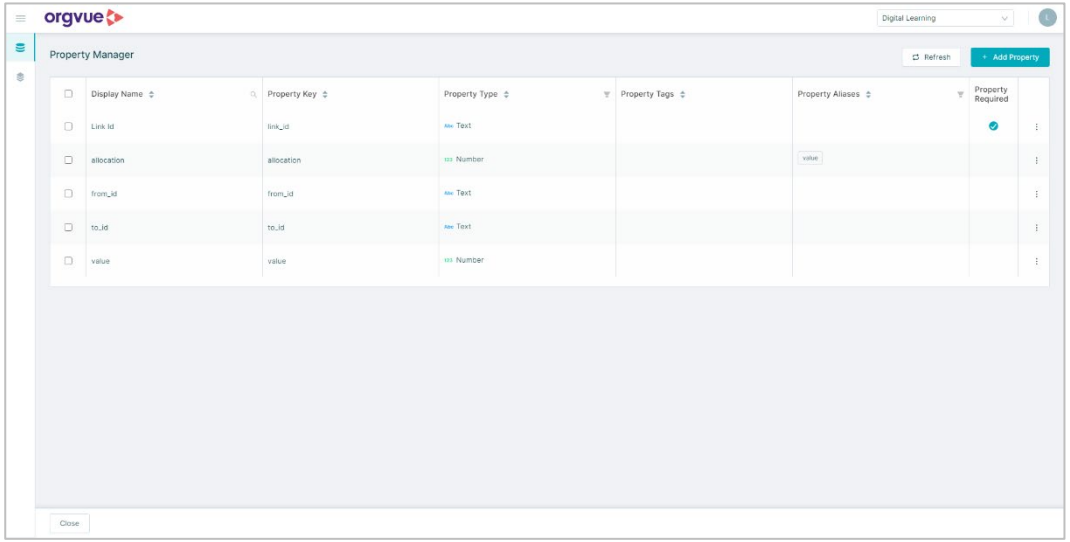
Once the upload process is complete, a new property is created within the links dataset **link_id.** This property is a combination of the **from_id** and the **to_id** as shown in (fig b) and represents the unique identify of the link between the datasets



(fig a)

	A	B	C	D
1	from_id	to_id	link_id	allocation
2	64	1	[64,1]	1
3	24	2	[24,2]	1
4	28	3	[28,3]	1
5	9	4	[9,4]	1
6	1	5	[1,5]	1
7	13	6	[13,6]	1
8	26	7	[26,7]	1
9	14	8	[14,8]	1
10	4	9	[4,9]	1
11	21	10	[21,10]	1
12	8	11	[8,11]	1
13	23	12	[23,12]	0.6
14	25	13	[25,13]	1
15	20	14	[20,14]	1

Demo people to roles



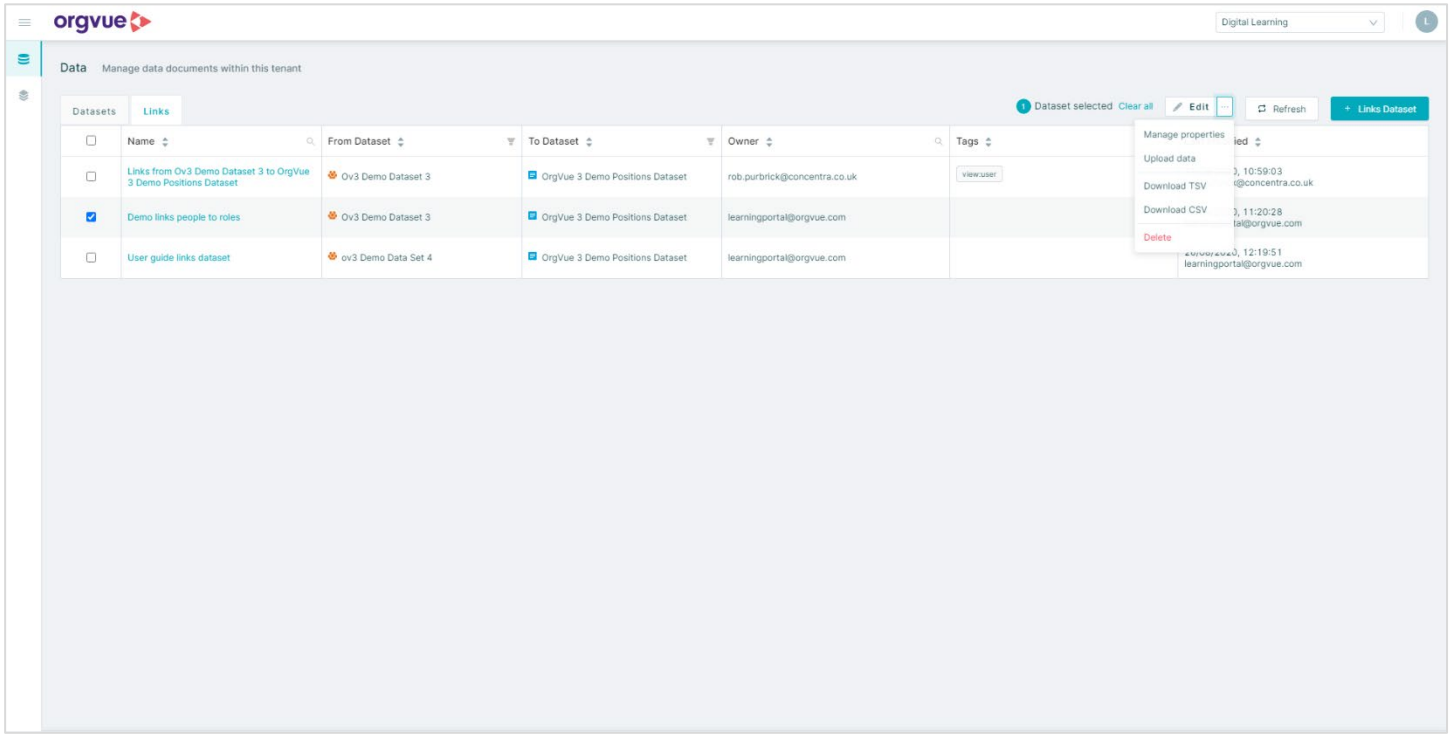
(fig b)

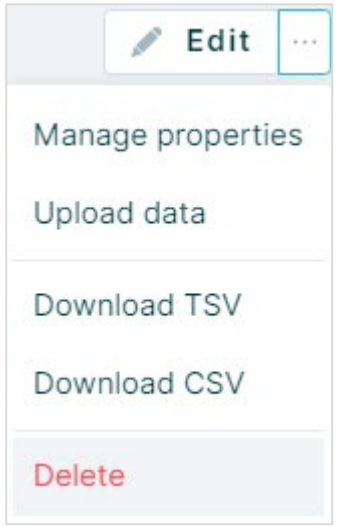
18.3 Manage & edit links dataset

Users can manage their links dataset from the list of links datasets or the links metadata page. From the **list links** page the user will be able to achieve the following:

Single Select
Download CSV
Download TSV
Delete
Property Manager
Upload Data

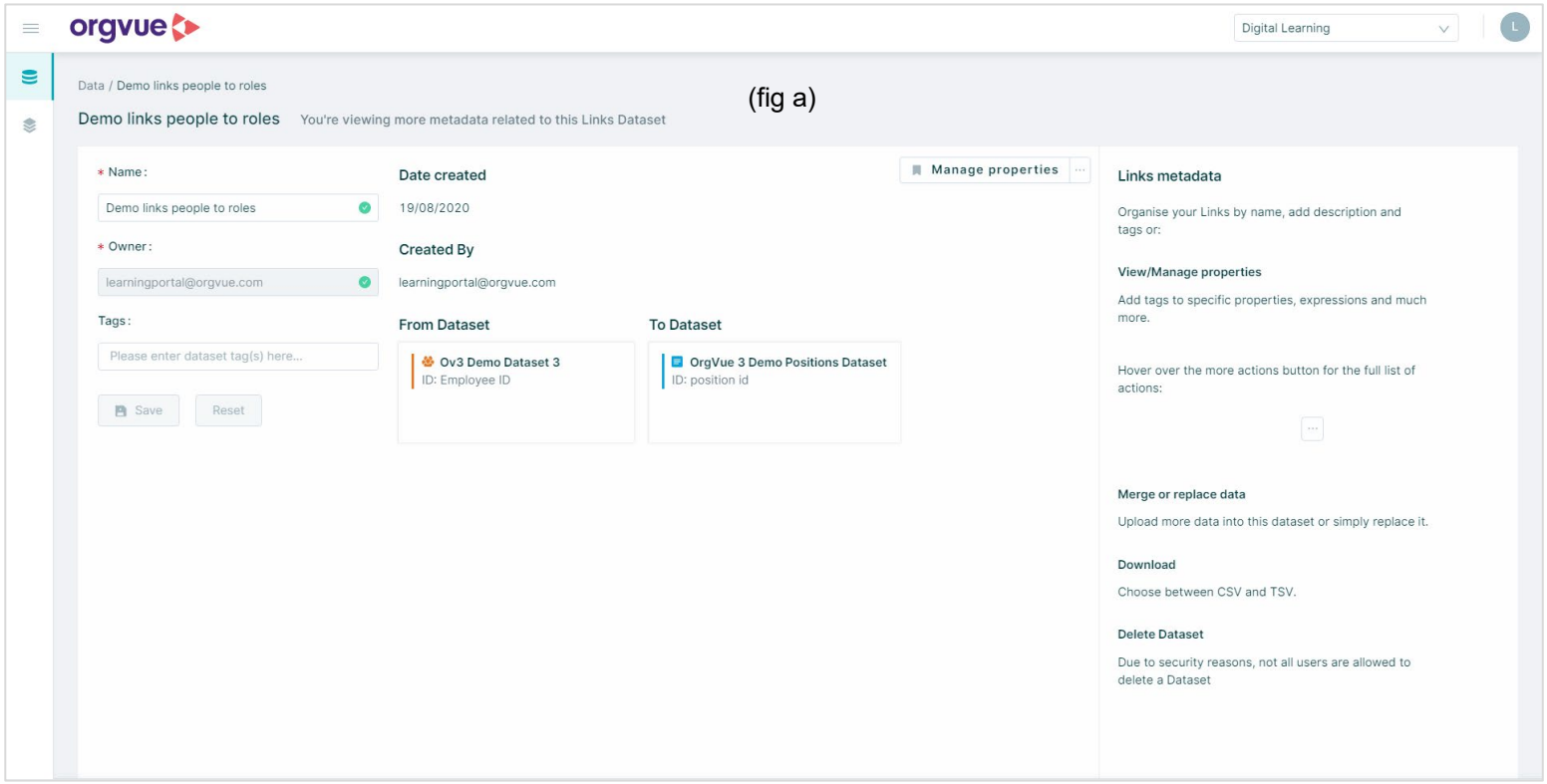
Multiple Select
Download CSV
Download TSV
Delete



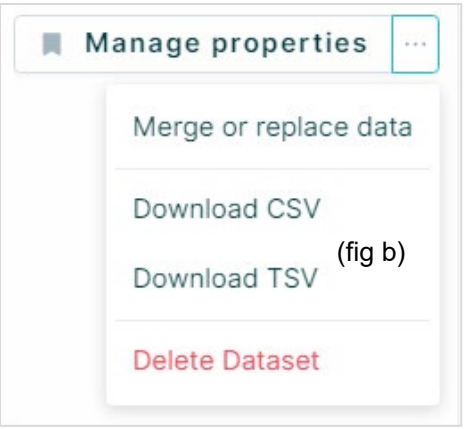


18.4 Paste Merge links dataset

Selecting the hyperlink on the name of any link dataset will open the links metadata screen (fig a) and it is possible to paste merge or replace the data into the links dataset from this screen by selecting this option and by selecting the more details menu and choosing **Merge or replace data** from the menu (fig b)



(fig a)

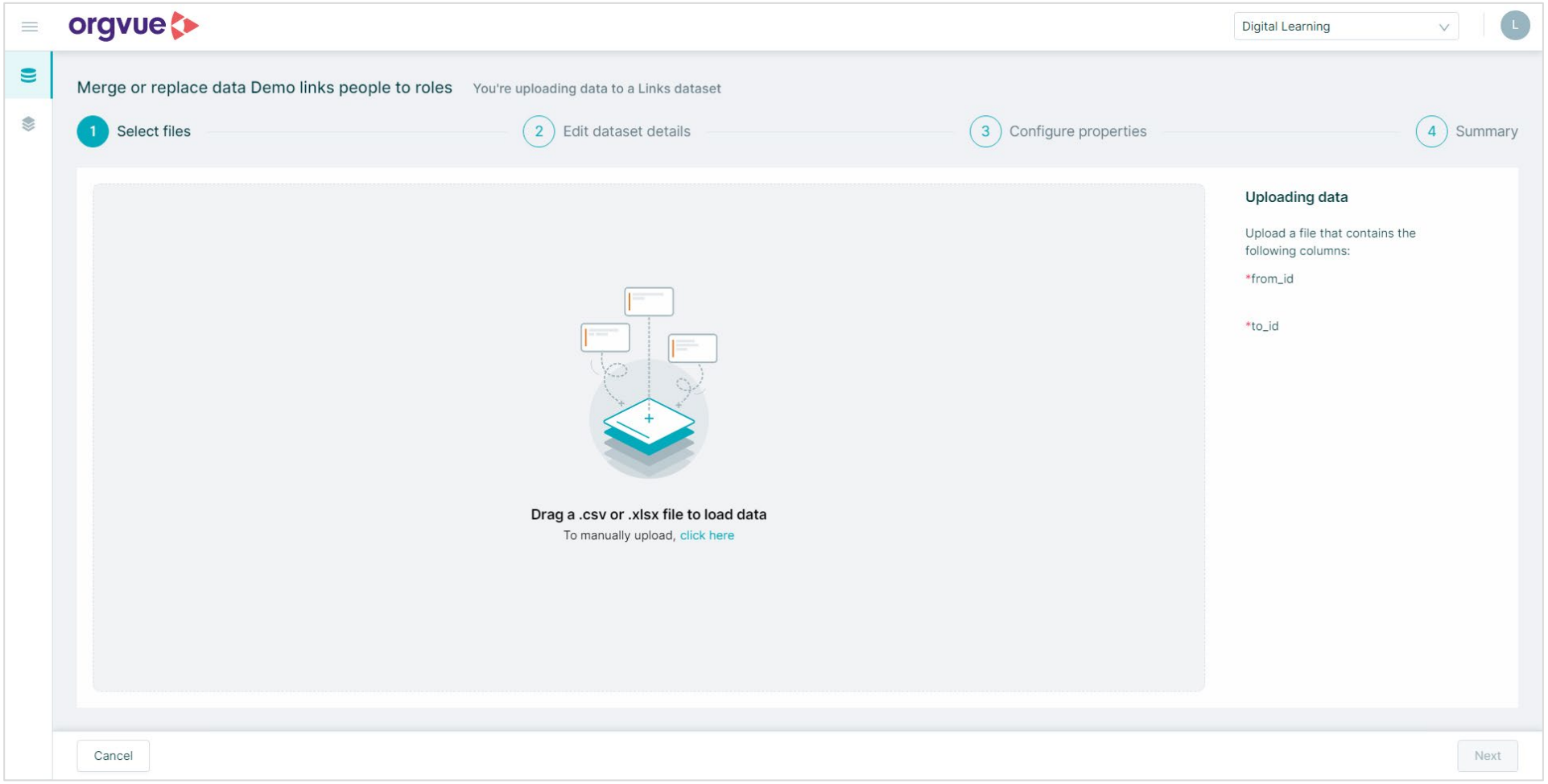


(fig b)

18.4 Paste Merge links dataset *continued*

Selecting the paste merge option will start the data upload **wizard** that follows a similar process flow as the initial upload process

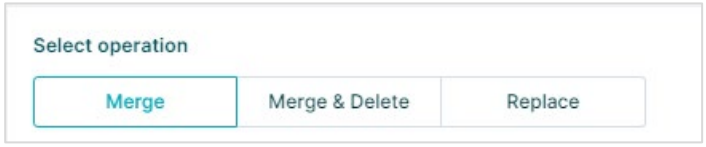
Upload files for paste merge process should contain the **from_id , to_id** properties as a minimum

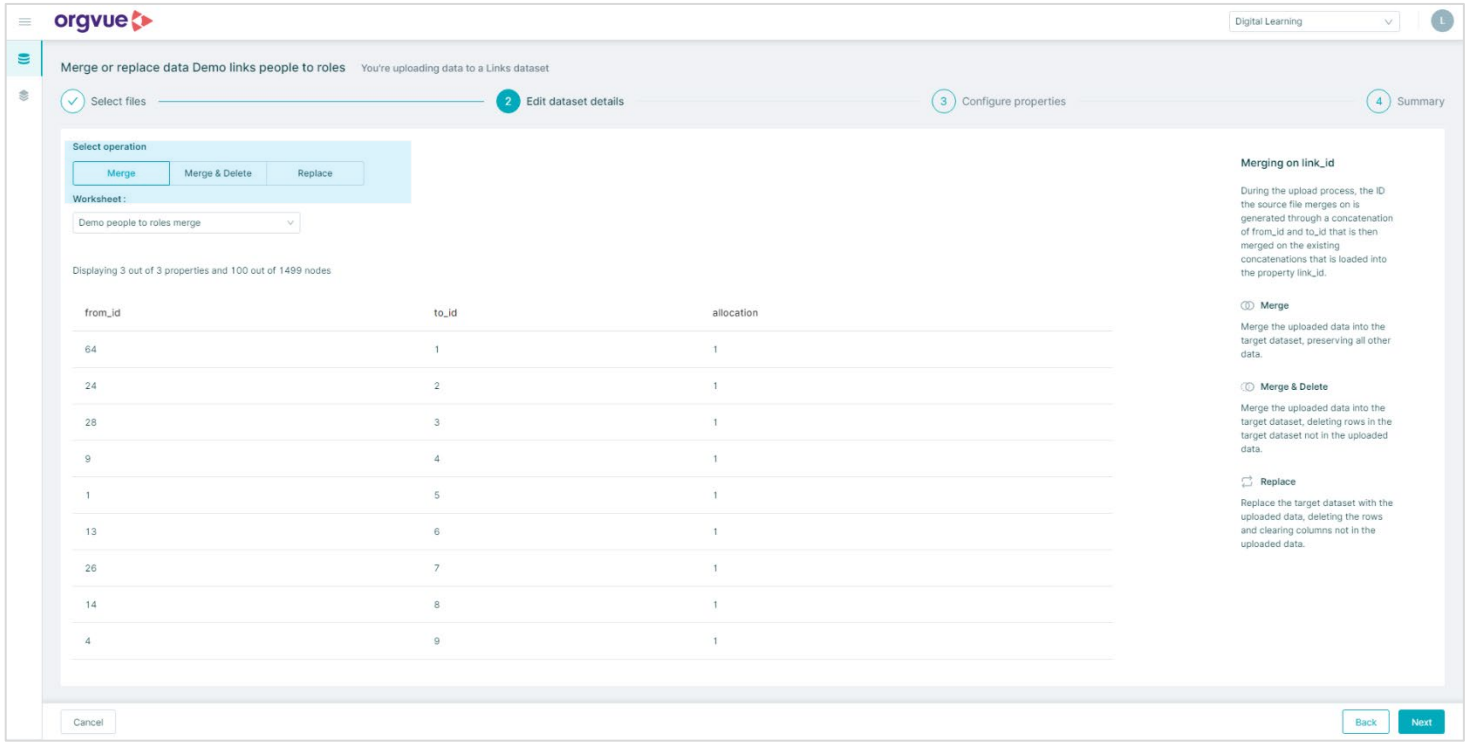


18.4 Paste Merge links dataset *continued*

Once the file has been uploaded a decision should be made on the type of merge being conducted. This is especially important with link datasets as the merge process will recalculate the **link_id** based on the **from_id & to_id** and will only update the allocation and any other property values where the **link_id** is the same.

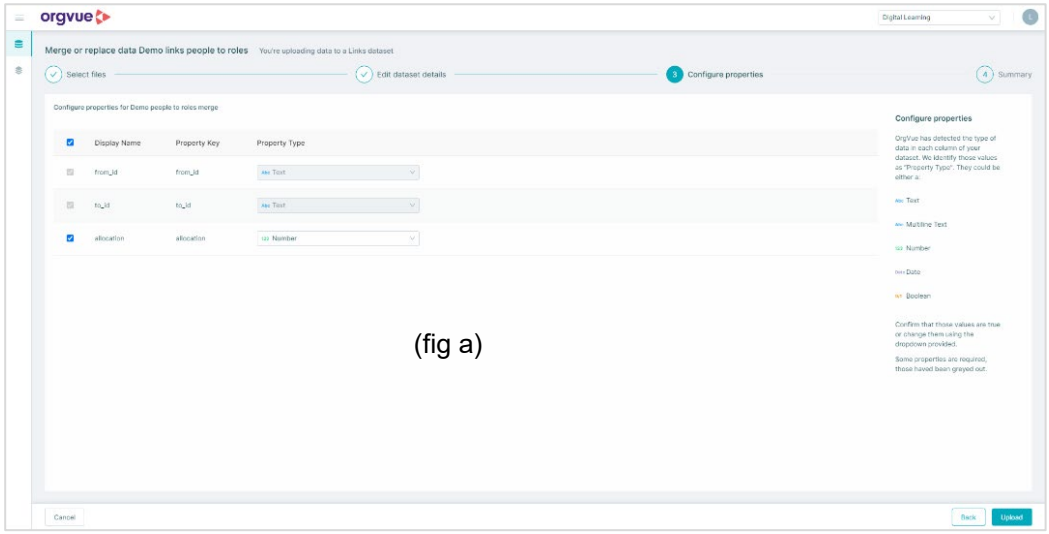
This will preserve any **from_id – to_id** links that are not present in the upload file



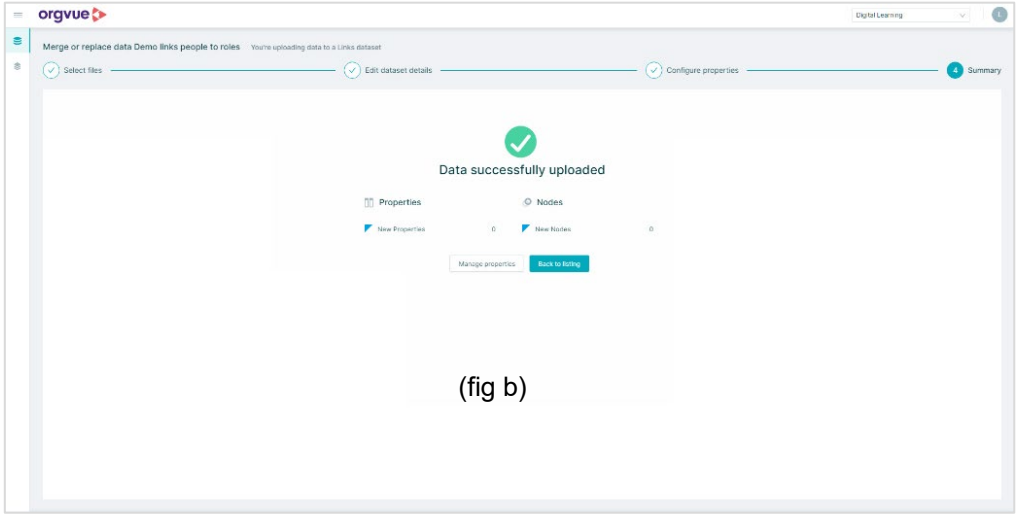


18.4 Paste Merge links dataset *continued*

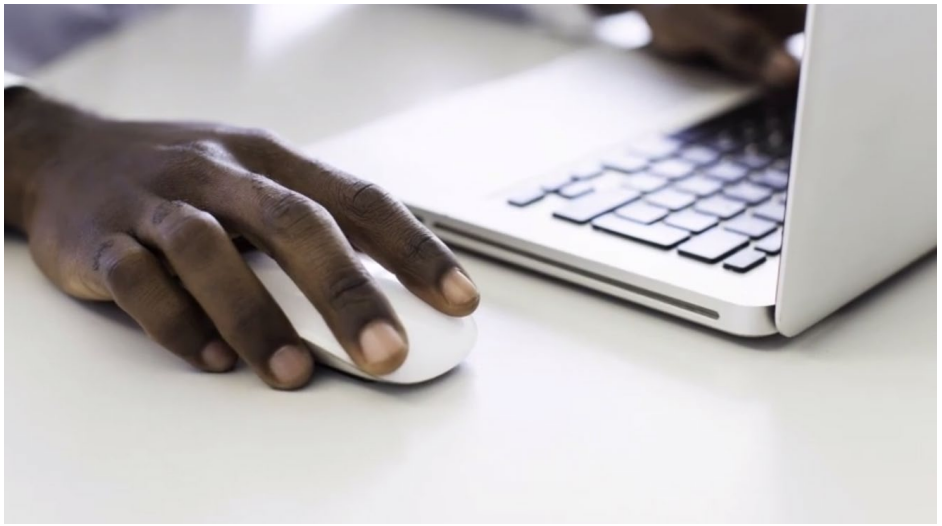
Once the required paste option is selected, the final screen allows the de selection of any properties in file that are not required (fig a). To complete the upload, press the **upload** button. The upload summary will then be displayed (fig b)



(fig a)



(fig b)



Note: This is version 3.8 of the User Guide. As the orgvue Settings application is developed, and new/amended features are added, the User Guide will be updated. We recommend you access this document online to ensure you are using the latest version.