

release notes

settings version 1.12

orgvue settings 1.12 release notes

January 25, 2021

Introduction

The orgvue Settings 1.12 release introduces a number of functional and UI enhancements. Highlights include the ability to copy a Dataset's meta-data for re-use and access to the Audit Log of a Dataset.

Key features in 1.12:

- 1. Copy data Properties: Copy Properties from one Dataset to another ensuring consistent setup of property tags, expressions and data formats.
- 2. Dataset list filtering: Enhancing the data list by differentiating between Live and archived Datasets for single tenant users.
- 3. Dataset Audit Log: Allow users to see which users have been making changes in a Dataset and understand at a Node Level what those changes were.
- 4. Dataset Filter: Create a Dataset Prefilter that allows you to create a filtered Dataset and provide edit access to the Nodes within the Dataset.
- 5. Dataset Label: Change the property set as the label for a Dataset.

1. Copy data Properties

The new 'Copy data Properties' in Settings allows you to select and copy the Properties from one Dataset and apply these Properties to another Dataset. This is useful if you wish to move configuration such as Property formats, tags and expressions from one Dataset to another. Copying Properties to a Dataset will lead to either a Property update or creation. Target Dataset Properties will be updated when the property selected in the source Dataset also exists in the Target Dataset, matching on Property Key. A Property will be created when the Property does not exist in the Target Dataset.

Users can access this functionality for data, archived data or master data lists by selecting the Dataset they need to copy the Properties from through either

- 1. Dataset list
- 2. Dataset metadata

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	Hierarchy Dataset		S People	timo	thy wintle@concentra.co.uk			Save as copy	/2020, 13:37:51 ty.wintle@concentra.co.uk
	Employees		People	timo	thy wintle@concentra.co.uk	K Read-only (1)		Download	/2020, 11:38:25 ty.wintle@concentra.co.uk
								Delete	

Selecting 'Copy data Properties' on either of those pages will take you to the first step of the Copy data Properties wizard where there are three required selections.

- 1. Property selection: Select the Properties that are to be copied into the target Dataset.
- 2. **Type Dataset name:** Select the target Dataset type and name where both active Datasets and archived Datasets are available in the dropdown.
- 3. Tags: Option to include all property tags when copying the configuration

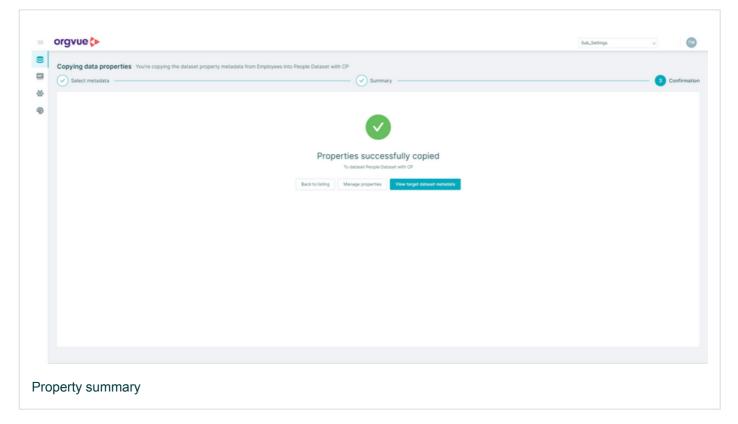
Note you cannot copy Properties into a Dataset in the master tenant from a Dataset in the sub-tenant.

-	cata properties You're copying the datase	et property metadata from Employees into People Dataset with	2 Summary		3 Confi
Properti	Display Name 0	 Property Key 0 	Property Type 0	▼ Property Tags ♀	Copy into target dataset Type Prope
•	Positioniocation	positionlocation	Abe Text		• Name
	Weeklyhours	weeklyhours	193 Number		People Dutaset with CP include tags
	Employeecontracttype	employeecontracttype	And Text		Add properties as
•	Isactiveemployee	leactiveemployee	ert Boolean		Properties that exist in both datasets will be updated new metadata where applicable. Any properties that exist in target will be added. No properties will be
•	Bradfordfactor	bradfordfactor	Also Text		removed. ID properties are not required.
	Positionbusinessunit	positionbusinessunit	Ann Text	aggregate	
	Dateofbirth	dateofbirth	Swire Date		
•	Employeeid	empkyeeid	133 Number		
•	Firstname	firstname	Ame Text		
•	Categoryofleaver	categoryofleaver	Abe Text		
•	Performanceratingcurrent	performanceratingcurrent	Abe Text		

The second step to copying the Properties is to review the impacted Properties in the target Dataset before applying the changes. In the summary stage you can identify each property and categorize it by whether it's New, Changed, Deleted or Unaffected. To determine the property category the Properties are matched by their property key. You must have edit access to the property in order to change the metadata of existing Properties.

	staset property metadata from Employees into People Dataset with CP		
Select metadata	2 Summary		3 Confirmat
Property changes list for People Dataset with CP Search Q.	T		Changes color code Review how the properties configuration is going to look like in your target dataset.
F An Positioniocation	Changes summary Total properties in People Dataset with CP after copy	72	New properties
 N3 Weeklyhours 	Properties selected from Employees	44	Changed properties
Ass Employeecontracttype	Properties being added to People Dataset with CP	44	
F err Isactiveemployee	Properties being changed in People Dataset with CP	0	Deleted properties
# Ann Bradfordfactor	Properties being deleted in People Dataset with CP	•	Unaffected properties
Ave Positionbusinessunit	Properties being unaffected in People Dataset with CP	28	Locked properties User doesn't have the permission to edit this
# two Dateofbirth	Properties in People Dataset with CP unaffected due to permissions	•	property
 nza Employeeid 			
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Once you select 'Copy' the Properties are applied to the Dataset and you will be presented with a confirmation page that allows navigation to the Data list or target Dataset's property manager or metadata page.



2. Filter by Data/Archived/Master-Sub Datasets

This feature will reduce the loading time for the Dataset list by categorizing the Datasets into live, archived and master/sub-tenant Datasets. You can change the Dataset category through the caret next to the data title in the top left of the window. The contents of each list are as follows:

- 1. Data: All Datasets that exist in the tenant that are not archived
- 2. Archived: All Datasets that exist in the tenant that have been tagged with 'archived'
- 3. *Tenant ID* (Master): Only exists for users who have access to a master tenant. Lists all non-archived Datasets in the master tenant.

There is limited functionality available to users accessing a Dataset from a master tenant when logged into a subtenant which is as follows:

- 1. Save-as copy
- 2. Copy data Properties
- 3. Download CSV/TSV
- 4. Property Manager (Read only)
- 5. Edit metadata (Read only)

Permissions for master/sub-tenant list have an additional layer where users will have access to the following Datasets as read-only content:

- 1. Standard users can access Datasets from the master tenant which are tagged with both 'view:guest' and 'view:user'.
- 2. If an admin has access to both the master and sub-tenant then they will see all non-archived master Datasets when they select Tenant ID data (Master) from the dropdown in the sub-tenant.

	 Manage data documents within this 	tenant				
Data	Data					C Refresh + 0
0	Archived data MASTER_SETTINGS data (Master) 	Dataset Type \$	¥ Owner ≎	9. Permissions ‡	Ψ Tags ≑	▼ Last Modified ≎
	Test paste replace	S People	timothy wintle@concentra.co.uk			15/12/2020, 12:10:22 timothy wintle@concentra.co.uk
	People Dataset with Test	S People	timothy wintle@concentra.co.uk			04/12/2020, 16:38:04 timothy wintle@concentra.co.uk
	Permissions Test Dataset	People	anirudh.bandaru@concentra.co.uk			08/12/2020, 13-26-14 anirudh bandaru@concentra.co.uk

3. Dataset Audit Log

The Audit Log provides users with the ability to view and download the changes for a specified Dataset over time. The download of the Audit Log provides a deep dive into Node level actions that have taken place for all Nodes that have been either created or updated.

Users can access the Audit Log via the data list by selecting a single Dataset or via the edit metadata page.

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	 Name ‡ 	Q Dataset Type Q	Ψ Owner ≑	9. Permissions ‡	Ψ Tags ≎	Manage properties sd \$ Merge / Replace Data
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	Grade	Lookups	emmetLogiony@orgvue.com		mci	Audit log 12 13 29
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	· Type:	13/11/2019			Merge or replace data Create Dataset filter	Organise your Datasets by name, type and tags or do more with:
	Lookups	Created	ay (ony@orgvue.com		Copy data properties	View/Manage properties
	Owner:		roperty information		Save as copy	Add tags to specific properties, expressions and much more.
	emmett.ogiony@orgvve.com		Total Nodes	1	Download	
	Tags:		Total Properties	2	Audit log	Hover over the more actions button for the full list of actions:
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	Dataset Configuration Changes made to the Dataset configur configuration for pre-existing Views and # If Label: Aw Currency	ation will not change the d Grafts.	us Number Ann Text Ann Muttine Text Ann Cute	1 1 -	, In	Merge or replace data Upload more data into this dataset or simply replace it. Download Choose between CSV and TSV. Delete Dataset

The Audit Log will by default show all the changes made in the last 24 hours by user. In addition you can identify who made the saves and how many Nodes were impacted. 'Nodes impacted' is defined as a Node that has either been created, changed or deleted. If you wish to widen or shorten the date range you can do this via the 'Date Range' option in the top right hand corner.

Access to the Node level Audit Log report is available via the "Download date range logs" option which will return all of the Nodes that have been created or updated in the specified date range. The Audit Log will contain a record of a Node having been deleted, though it will only show the date/time stamp and the user who performed the action. Because the Node has been deleted there is no information available for the Unique ID of the node. This is available in CSV or TSV format and has a maximum limit of 100,000 Nodes impacted in one download.

Data / Real Company / Audit Log of Real Company				
Audit Log of Real Company You're vie	wing the changes implemented on this datase			🔿 Refresh 🔠 Download date rang
				Showing all saves between 12 Jan 2021, 18:27:16 and 13 Jan 2021, 18:27:16 🛗 Date
Saved at 0		Saved by \$	v Nodes impacted	
13 Jan 2021, 18:22:49		Emothy wintle@concentra.co.uk	1	
13 Jan 2021, 18:22:49		Emothy wintle@concentra.co.uk	9	
13 Jan 2021, 18:21:51		Emothy wintle@concentra.co.uk	6	
13 Jan 2021, 18:19:55		Emothy wintle@concentra.co.uk	3	
13 Jan 2021, 18:19:21		timothy wintle@concentra.co.uk	1	
13 Jan 2021, 18:17:58		timothy wintle@concentra.co.uk	19	
13 Jan 2021, 1815:59		timothy wintle@concentra.co.uk	484	
13 Jan 2021, 18:12:33		timothy wintle@concentra.co.uk	1505	
		¢		

When you select the date range you will have the option to select the date and the time. This will allow you to filter down to a specific save in order to retrieve the Node level report and can be especially handy when working with large Datasets with a large number of impacted Nodes.

Noc	des imp	pacted		Sele	ect dat	e rang	e			
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_	10	11	12	13	14	15	16	21	30	19
1	17	18	19	20	21	22	23	22	31	20
19	24	25	26	27	28	29	30	2 B	32	21
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150	F									

Note we hope to extend the audit log capabilities to drafts in the future.

4. Dataset Filter

A Dataset Filter (prefilter) is similar to a View in that it allows users access to a slice of the Dataset without providing access to the entire Dataset. A Dataset Filter allows you to edit Nodes in the underlying data provided that you have been given the correct permission.

Users can create a Dataset filter via the data list page by selecting a single Dataset or the edit metadata page.

	Data ~	Manage data docume	ents within this tenant							
	Datas	ets Links			1 Dataset selected	Clear a	Edit …		C Refresh	+ Datase
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		Lookup dataset	🐸 People	siddharth.sahoo@concent co.uk	rə.		Create Dataset filter		13/01/2021, 18:4 timothy.wintle@e .uk	
		Real Company	🐸 People	timothy.wintle@concentra uk	.co.		Copy data properties Save as copy		13/01/2021, 18:15 timothy.wintle@duk	
		Dataset prefilter test	👺 People	timothy.wintle@concentra uk	.co. 🗶 Read-only (1)		Download Audit log		12/01/2021, 18:24 timothy.wintle@ .uk	
		Currency	Lookups	timothy.wintle@concentra uk	.co. 🗶 Read-only (1)		Delete		12/01/2021, 09:4 timothy.wintle@e .uk	
		new data	👺 People	siddharth.sahoo@concent co.uk	ra. Modify (1)				09/12/2020, 17:4 timothy.wintle@e .uk	

0	rgvue 🐤				Master_Settings	~	TW
	Data / Dataset prefilter						
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	• Type :	Created By		Create Dataset filter	tags or do more with:		
	Meople V	timothy.wintle@concentra.co.uk		Copy data properties	View/Manage properties		
	Owner:	Node & Property Information		Save as copy	Add tags to specific properties, e and much more.	expressions	
	timothy.wintle@concentra.co.uk			Download			
	Tags :	Total Nodes	1505		Hover over the more actions butt list of actions:	on for the full	
	view:user×	Total Properties	37	Audit log	list of actions:		
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	and Drafts.	Abe Multiline			Upload more data into this datas	et or simply	

Once you select Dataset Filter, a window will appear where you will need to enter the following information: **Name:** Name of the Dataset Filter **Filter-on property:** A list of Properties that are available for the creation of buckets that have been tagged with *'aggregate'*. Only Properties of type 'text' or 'boolean' can be used with the *'aggregate'* tag.

Visible buckets: Select the attributes that are used to define the scope of Nodes in the Filter. Any Node with the selected attribute will be included in the data slice.

Add Property: Add additional Properties required for the data slice. When more than one property is used to create a Dataset Filter, a Node must satisfy both conditions to be included in the Dataset Filter e.g. Department = HR AND Location = UK

Tags: Permissions tags such as view:user.

Parent ID: The property that will be used to define the hierarchy.

Including the Properties: The Properties that you wish to include in a Dataset filter. Useful when you have a Dataset with a large number of Properties and wish to keep only required Properties to create the Dataset Filter.

For a Dataset filter to be created it must have a Name and at least 1 Node in the data slice. The create button will be disabled in the case of 0 Nodes. Once you select '*Create*' the Dataset Filter will be available to open in Workspace. The Dataset Filter will not be shown in the Settings application and tags are not available to edit after the Dataset Filter has been created.

If the Dataset filter needs to include ghost nodes then the parent id must be tagged with the 'index' tag.

5. Dataset Label

Users will be able to change the Label for their Dataset in Settings via the edit metadata page for a Dataset. Changing the Label will only update the Dataset and not apply to any Views or Drafts previously created. If the Label has been changed for a Dataset, any Pack opened directly from that Dataset will reflect the modified Label as compared to the original Label that will display if the Pack were to be opened from previously created Views or Drafts.

Duta / Real Company							
Real Company You're viewing more metadata	a related to this Dataset						
• Name1	Date created		R Manage properties	Dataset metadata			
Real Company	13/01/2021			Organise your Datasets by name, type and tags or do			
• Type:	Created By			more with:			
People	 timothy wintle@concentra.co.uk 			View/Manage properties Add tags to specific properties, expressions and much			
Owner:	Node & Property Information	Add t					
timothy wintle@concentra.co.uk							
Tags:	Total Nodes	1484		Hover over the more actions button for the full list of actions:			
Please enter dataset tag(s) here	Total Properties	37					
Dataset Configuration	saa Number	15					
Changes made to the Dataset configuration		18		Merge or replace data			
configuration for pre-existing Views and Dra T Label:	Ase Multine Text			Upload more data into this dataset or simply replace it.			
Alex Full Name	ten Date	4		Download			
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ware a construction of the second sec				Delete Dataset Due to security reasons, not all users are allowed to			
B Save Reset				delete a Dataset			