

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:

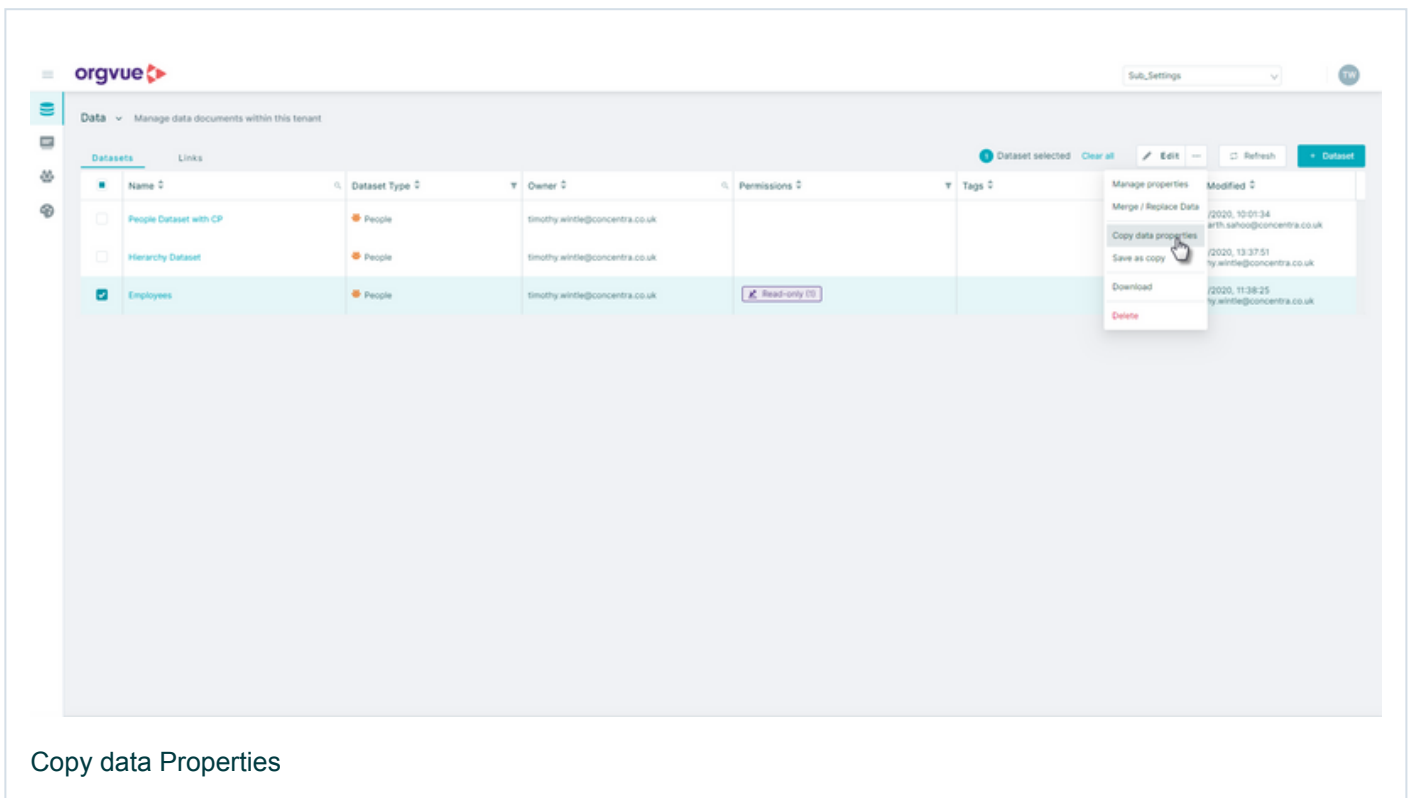
1. **Copy data Properties:** Copy Properties from one Dataset to another ensuring consistent setup of property tags, expressions and data formats.
2. **Dataset list filtering:** Enhancing the data list by differentiating between Live and archived Datasets for single tenant users.
3. **Dataset Audit Log:** 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



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.

Copying data properties You're copying the dataset property metadata from Employees into People Dataset with CP

1 Select metadata 2 Summary 3 Confirmation

Display Name	Property Key	Property Type	Property Tags
Positionlocation	positionlocation	Adv Text	
Weeklyhours	weeklyhours	123 Number	
Employeecontracttype	employeecontracttype	Adv Text	
Inactiveemployee	inactiveemployee	017 Boolean	
Bradfordactor	bradfordactor	Adv Text	
Positionbusinessunit	positionbusinessunit	Adv Text	aggregate
Dateofbirth	dateofbirth	Adv Date	
Employeeid	employeeid	123 Number	
Firstname	firstname	Adv Text	
Categoryofleaver	categoryofleaver	Adv Text	
Performanceratingcurrent	performanceratingcurrent	Adv Text	

Cancel Copy

Select data Properties

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.

Copying data properties You're copying the dataset property metadata from Employees into People Dataset with CP

1 Select metadata 2 Summary 3 Confirmation

Property changes list for People Dataset with CP

Changes summary

Property Key	Property Type	Property Tags
Positionlocation	Adv Text	
Weeklyhours	123 Number	
Employeecontracttype	Adv Text	
Inactiveemployee	017 Boolean	
Bradfordactor	Adv Text	
Positionbusinessunit	Adv Text	aggregate
Dateofbirth	Adv Date	
Employeeid	123 Number	
Firstname	Adv Text	
Categoryofleaver	Adv Text	
Performanceratingcurrent	Adv Text	
Employeelocation	Adv Text	
Tenure	123 Number	
Leavedate	Adv Date	
Employeestatus	Adv Text	
Positiontitle	Adv Text	
Surname	Adv Text	

Changes summary

Category	Count
Total properties in People Dataset with CP after copy	72
Properties selected from Employees	44
Properties being added to People Dataset with CP	44
Properties being changed in People Dataset with CP	0
Properties being deleted in People Dataset with CP	0
Properties being unaffected in People Dataset with CP	28
Properties in People Dataset with CP unaffected due to permissions	0

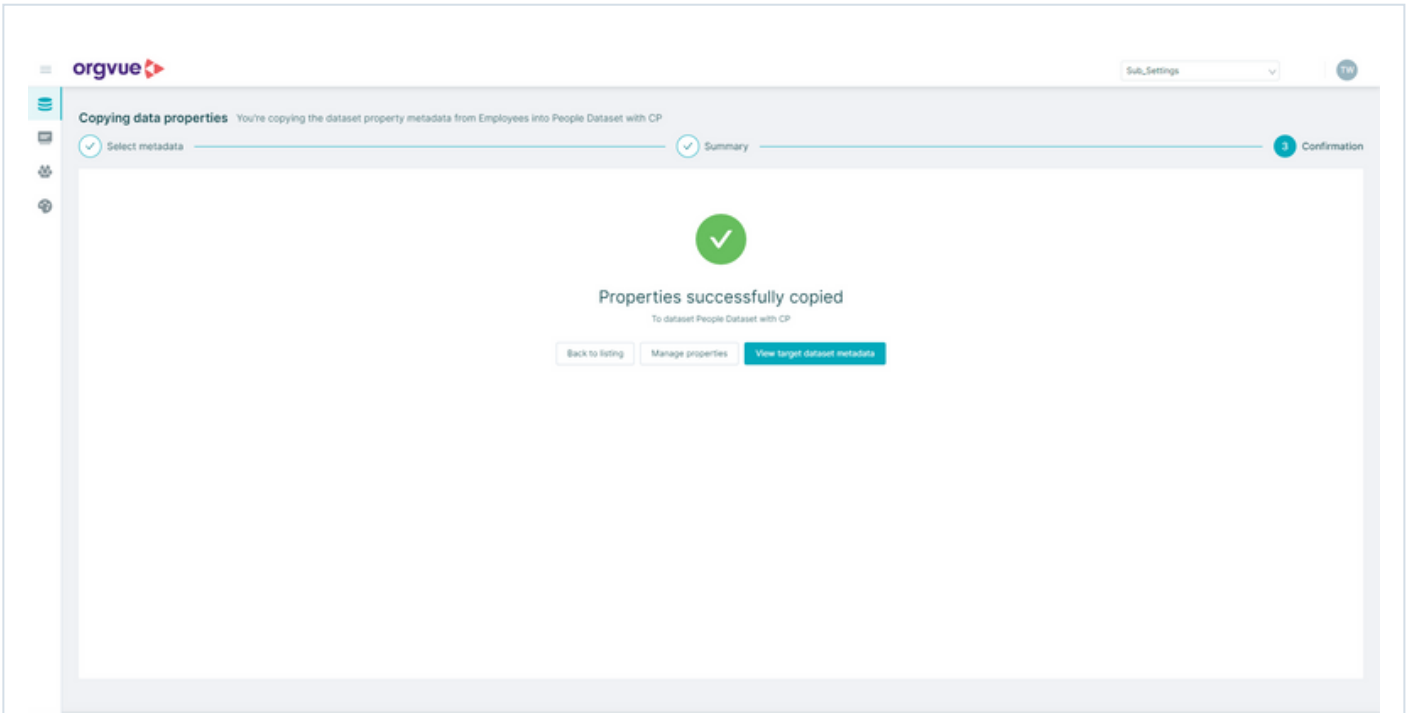
Changes color code

- New properties
- Changed properties
- Deleted properties
- Unaffected properties
- Locked properties: User doesn't have the permission to edit this property.

Cancel Back Copy

Property summary

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.



Property summary

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:

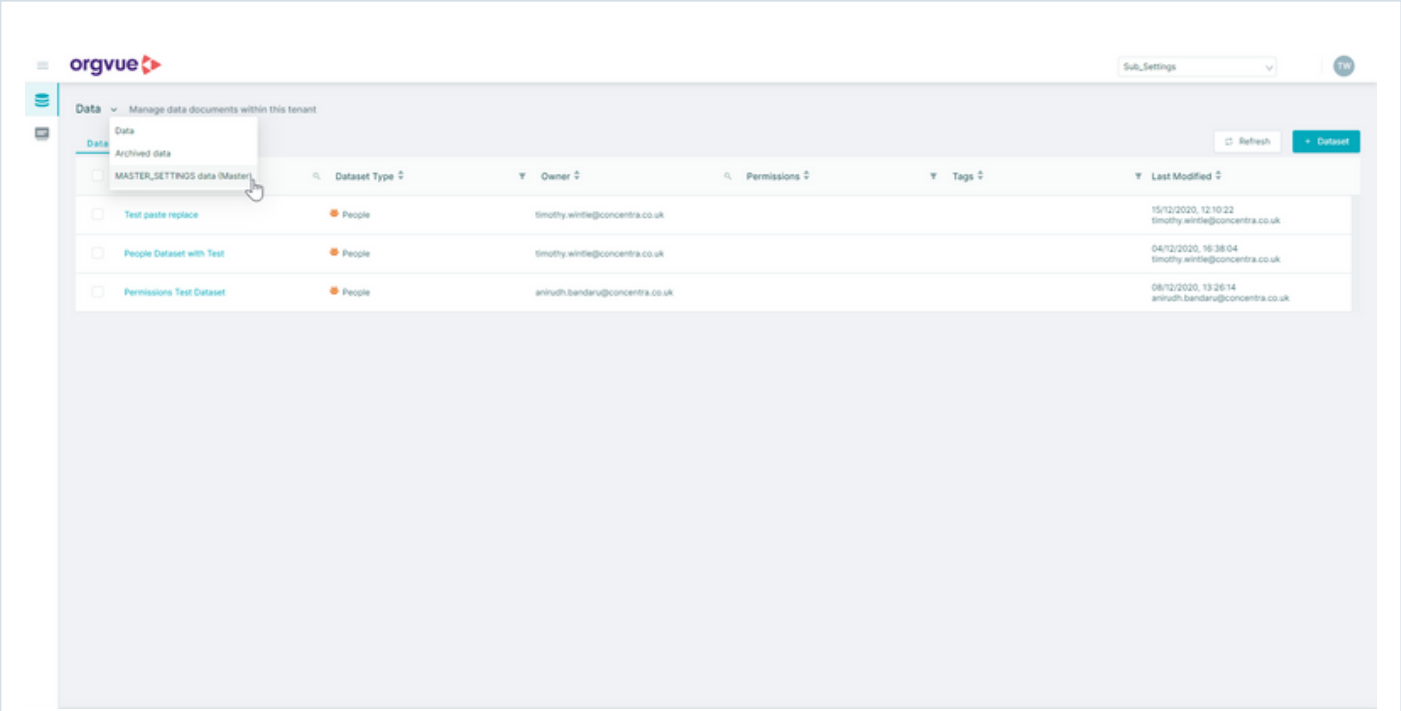
1. **Data:** All Datasets that exist in the tenant that are not archived
2. **Archived:** All Datasets that exist in the tenant that have been tagged with 'archived'
3. **Tenant ID (Master):** Only exists for users who have access to a master tenant. Lists all non-archived Datasets in the master tenant.

There is limited functionality available to users accessing a Dataset from a master tenant when logged into a sub-tenant 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.



The screenshot shows the orgvue interface with a dropdown menu open for 'Data'. The menu options are 'Data', 'Archived data', and 'MASTER_SETTINGS data (Master)'. The main table displays the following datasets:

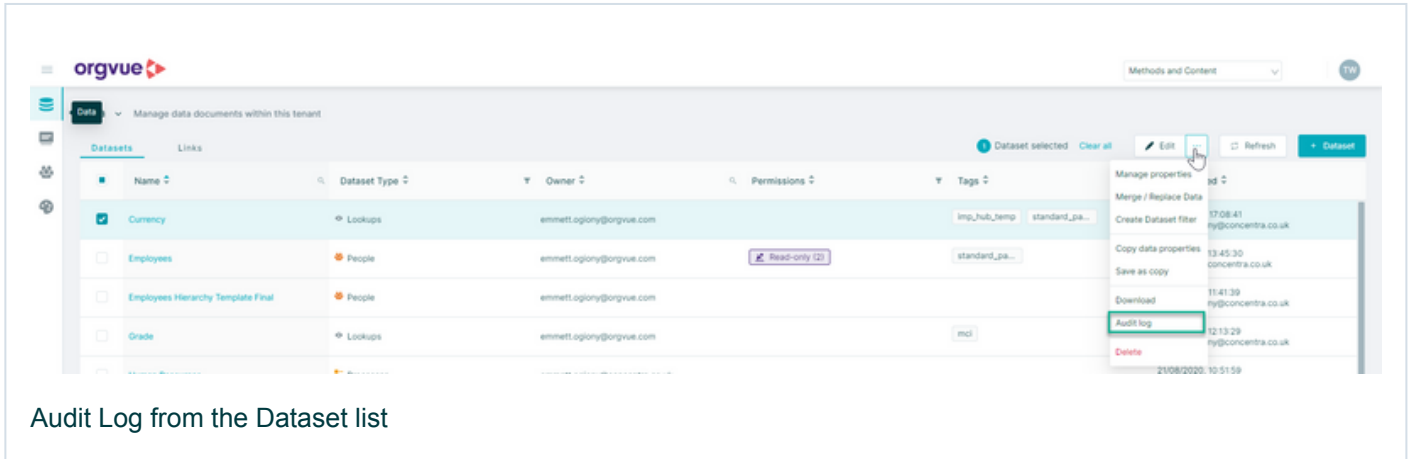
Dataset Name	Dataset Type	Owner	Last Modified
Test paste replace	People	timothy.winter@concentra.co.uk	15/12/2020, 12:10:22 timothy.winter@concentra.co.uk
People Dataset with Test	People	timothy.winter@concentra.co.uk	04/12/2020, 16:38:04 timothy.winter@concentra.co.uk
Permissions Test Dataset	People	anirudh.bandaru@concentra.co.uk	08/12/2020, 13:26:14 anirudh.bandaru@concentra.co.uk

Data listing by data, archived and master Datasets

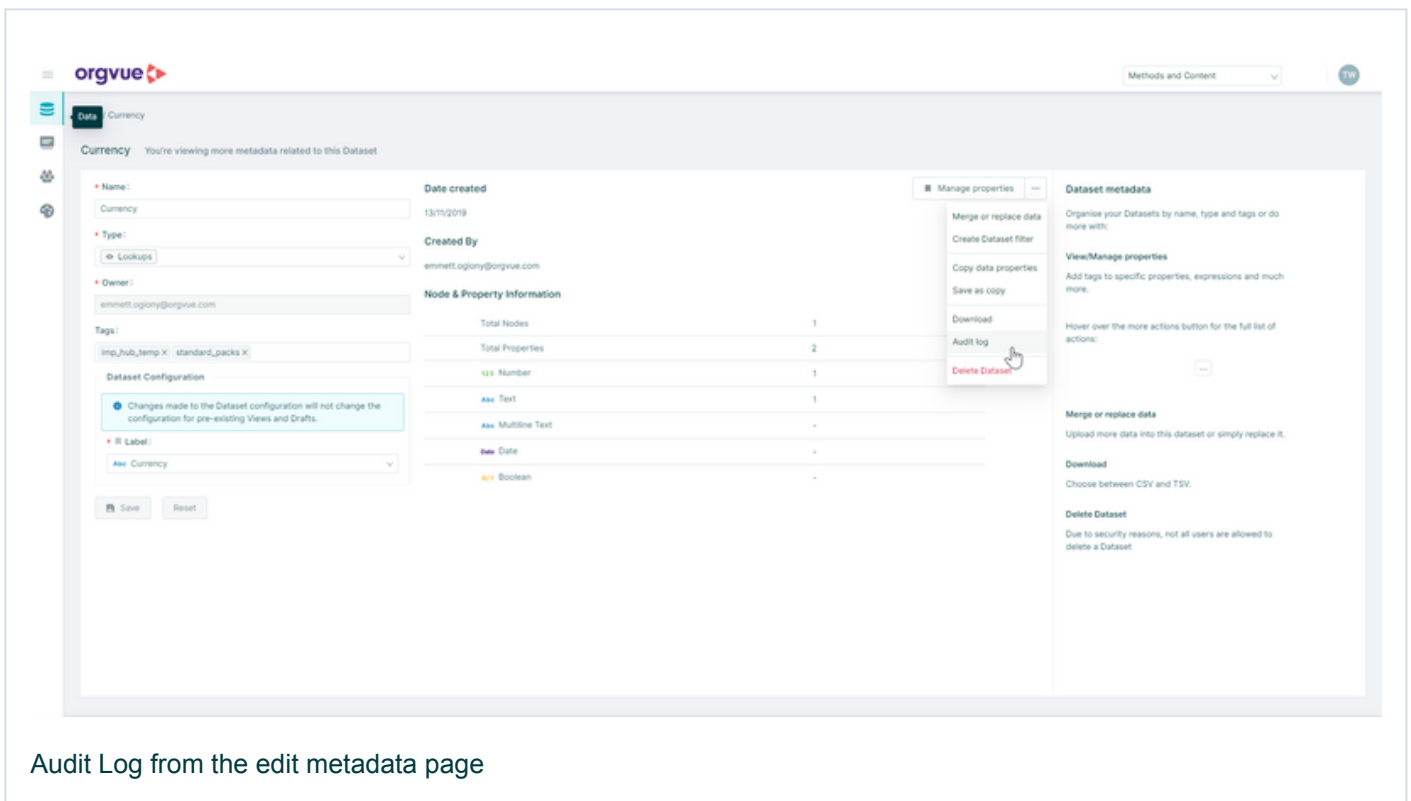
3. Dataset Audit Log

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.



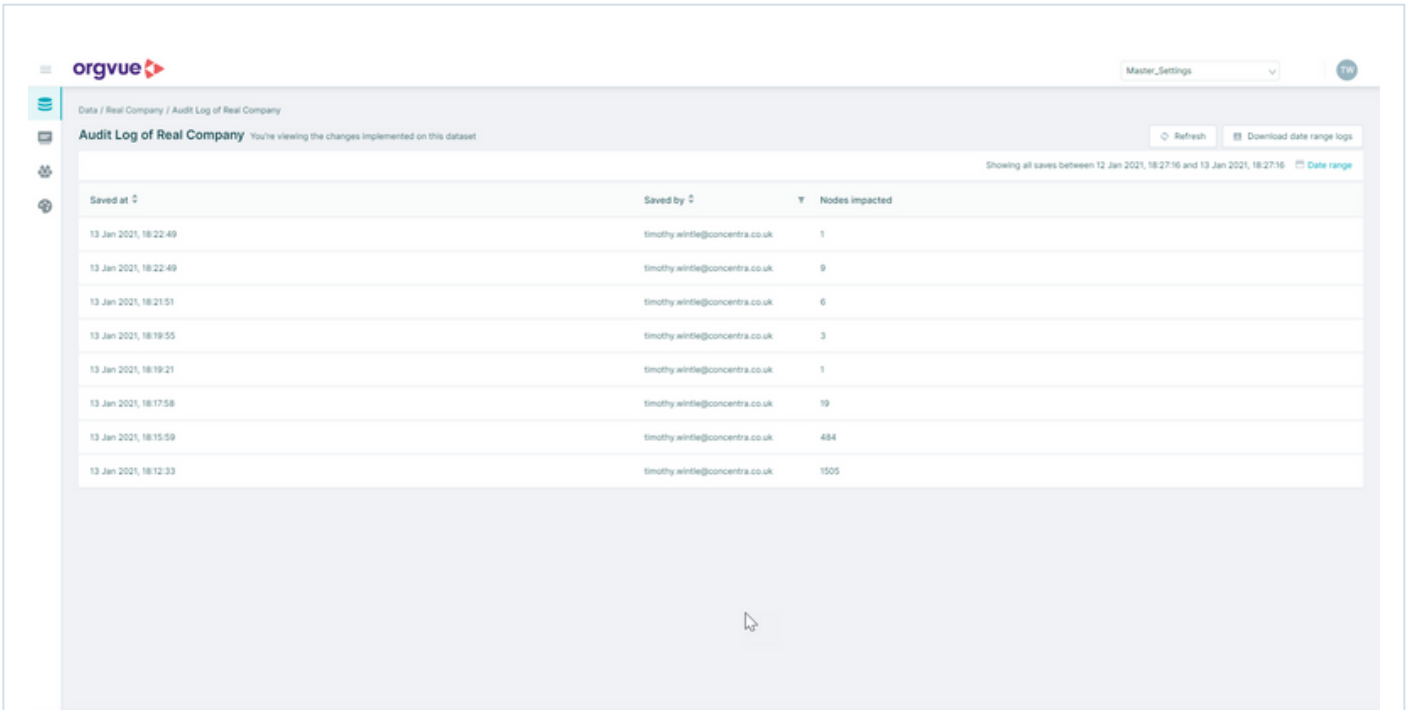
Audit Log from the Dataset list



Audit Log from the edit metadata page

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.



The screenshot displays the 'Audit Log of Real Company' interface. At the top, there is a navigation bar with the orgvue logo and a 'Master_Settings' dropdown. Below this, the breadcrumb 'Data / Real Company / Audit Log of Real Company' is visible. The main heading is 'Audit Log of Real Company' with a sub-note: 'You're viewing the changes implemented on this dataset'. To the right of the heading are 'Refresh' and 'Download date range logs' buttons. A status bar indicates 'Showing all saves between 12 Jan 2021, 18:27:16 and 13 Jan 2021, 18:27:16' with a 'Date range' link. The table below has three columns: 'Saved at', 'Saved by', and 'Nodes impacted'. All 'Saved by' entries are 'timothy.wintle@concentra.co.uk'. The 'Nodes impacted' values are 1, 9, 6, 3, 1, 19, 484, and 1505.

Saved at	Saved by	Nodes impacted
13 Jan 2021, 18:22:49	timothy.wintle@concentra.co.uk	1
13 Jan 2021, 18:22:49	timothy.wintle@concentra.co.uk	9
13 Jan 2021, 18:21:51	timothy.wintle@concentra.co.uk	6
13 Jan 2021, 18:19:55	timothy.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, 18:15:59	timothy.wintle@concentra.co.uk	484
13 Jan 2021, 18:12:33	timothy.wintle@concentra.co.uk	1505

Audit Log saves list

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.

Nodes impacted

Select date range

2021-01-12 18:27:16 → 2021-01-13 18:27:16

Jan 2021

Su	Mo	Tu	We	Th	Fr	Sa	18	27	16
27	28	29	30	31	1	2	19	28	17
3	4	5	6	7	8	9	20	29	18
10	11	12	13	14	15	16	21	30	19
17	18	19	20	21	22	23	22	31	20
24	25	26	27	28	29	30	23	32	21
31	1	2	3	4	5	6	24	33	22
							25	34	23

Ok

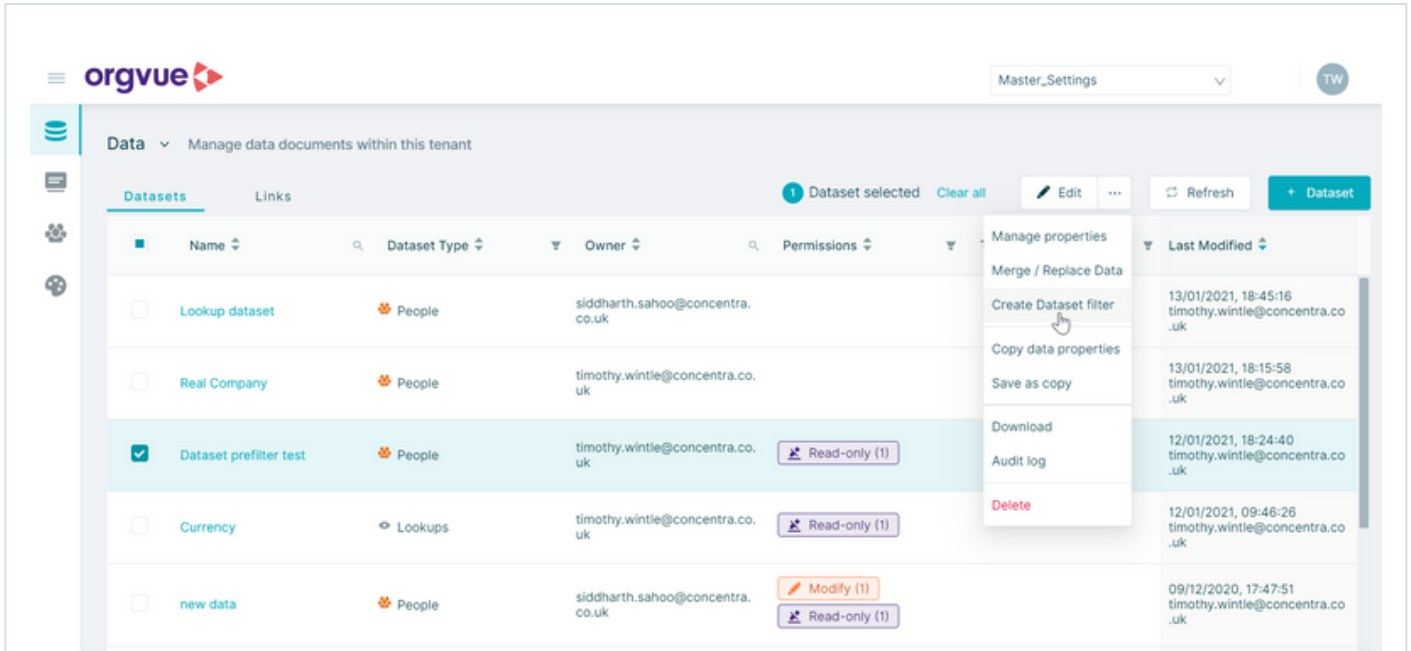
Audit Log date range

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

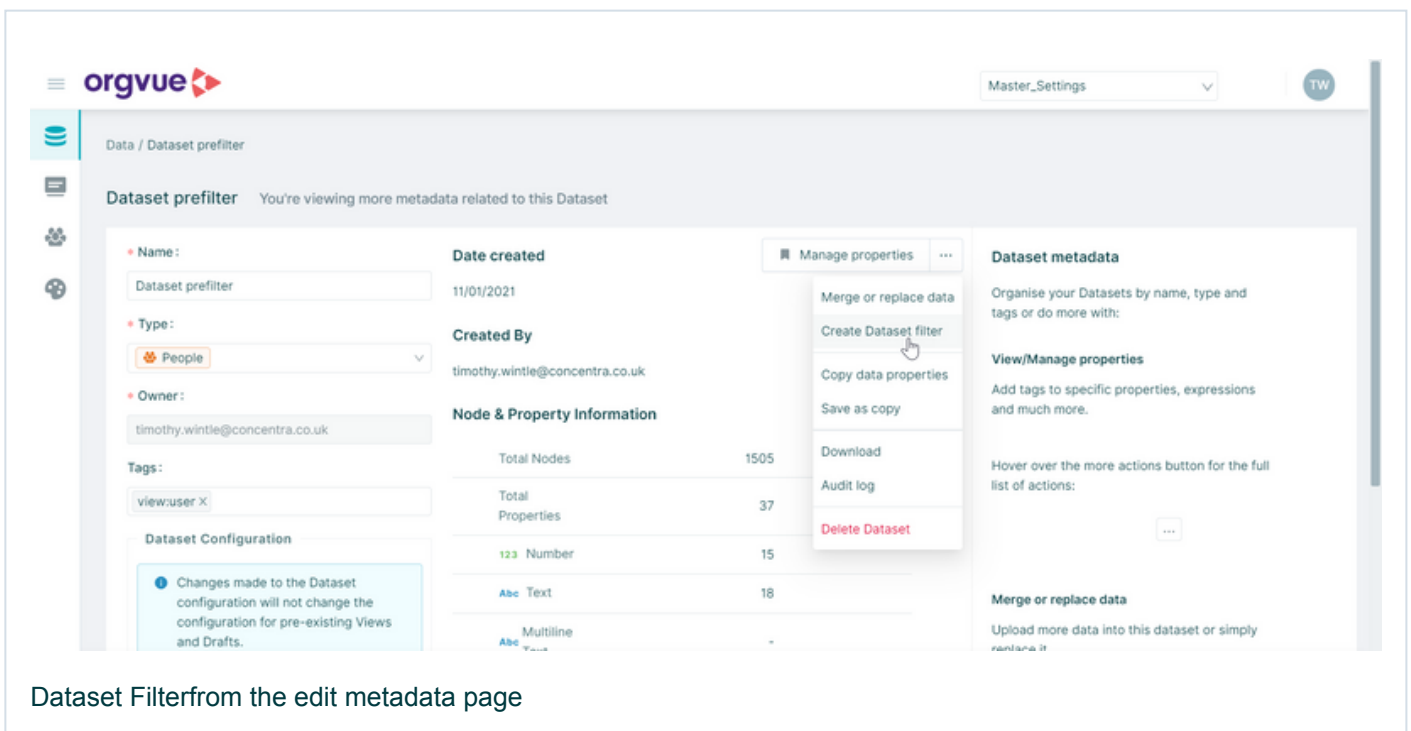
4. Dataset Filter

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.



Dataset Filter from the Dataset list



Dataset Filter from the edit metadata page

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.

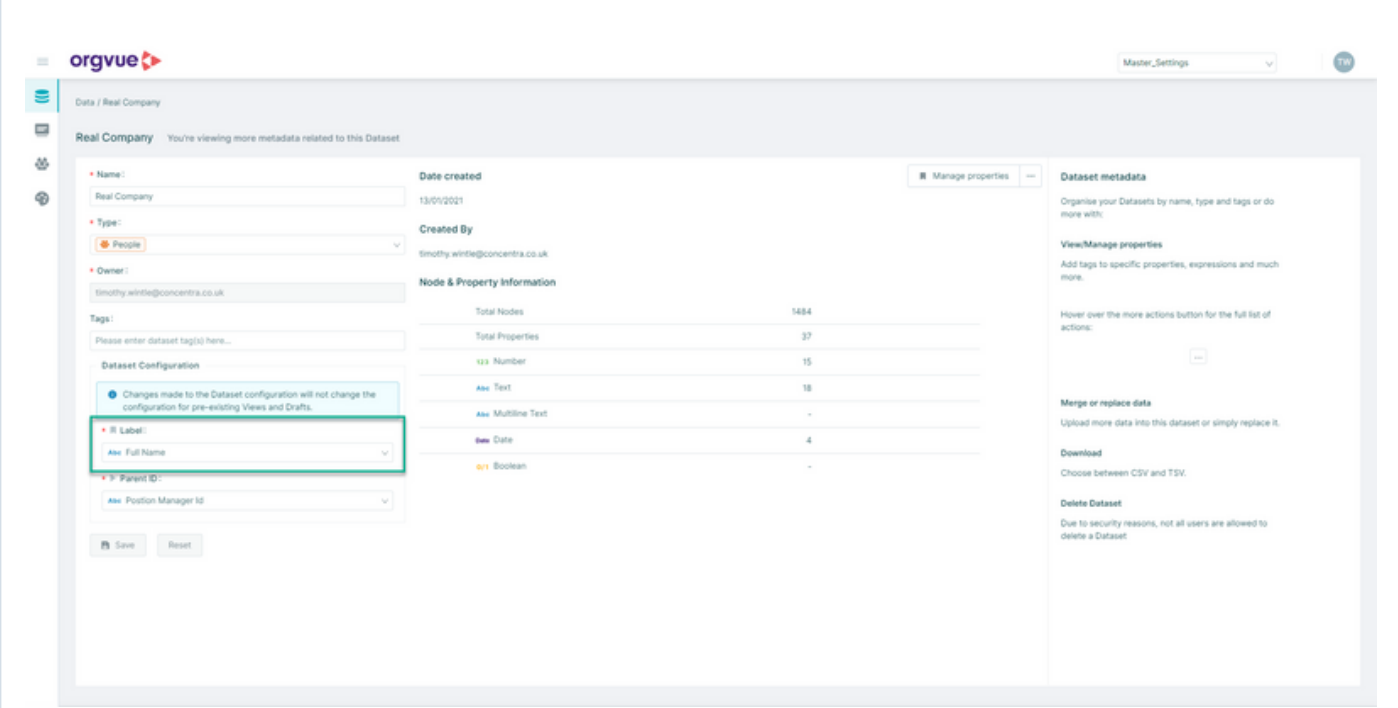
Including the Properties: The Properties that you wish to include in a Dataset filter. Useful when you have a Dataset with a large number of Properties and wish to keep only required Properties to create the Dataset Filter.

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.



The screenshot shows the 'Real Company' dataset settings page. The 'Dataset Configuration' section is highlighted with a red box, showing the 'Label' dropdown menu set to 'Full Name'. The 'Node & Property Information' table shows the following data:

Node & Property Information	
Total Nodes	1884
Total Properties	37
123 Number	15
444 Text	18
444 Multiline Text	-
444 Date	4
0/1 Boolean	-

Below the table, the 'Dataset Configuration' section is highlighted with a red box, showing the 'Label' dropdown menu set to 'Full Name'. The 'Parent ID' dropdown menu is set to 'Position Manager Id'. The 'Save' and 'Reset' buttons are visible at the bottom of the configuration section.

Change the Label by property