

Version 1.4 Release Notes

Last Modified on 08/10/2020 6:22 pm EDT

New Features

Export Reports

The [Data Analytics Export](#) report type is designed to allow an object's data to be exported into an Excel spreadsheet, including any related object types selected in the data definition. These reports can be accessed via an action or view in an activity or in an Export Data form action.

Location Data Export

ANALYTICS EXPORT

This tool is used to export all data defined by the below parameters into an Excel format that can be consumed by third-party analytics tools. Note: permissions are applied on export.

EXPORT DETAILS

Report Name: Location Data Export

Report Focus:

Location > Incident

Anchor Object: Montreal

CANCEL EXPORT TO EXCEL

Form Actions

With the new [Actions](#) feature on configurable forms, end users can click a customizable button from within an object to open a report or form of an administrator's choosing or access a Data Analytics report for the current object.

Controls

Incident Name

Controls 12-AC

Created On

2017-09-27

Created By

Date of submission

 September 27, 2017

Control Effectiveness

Effective

OPEN RISK & CONTROLS REPORT

EXPORT CONTROL OBJECT DATA

REVIEW & PRINT RISK



Concatenation

Concatenation uses variables to pull data from the properties and fields saved to an object type or related object types which then automatically populate plain text fields or the [Name and/or Description properties](#) of objects. This feature is also available on [Plain Text](#) fields.

EDIT CONCATENATION

DETAILS

Data Definition

Incident Only

VARIABLES

DateSubmitted

×

Field: Date of submission

IncidentType

×

Field: Incident Type

+ ADD VARIABLE

EXPRESSION

{{{DateSubmitted}}} - {{{IncidentType}}}

Variables must be wrapped in triple braces. Eg: {{{VARIABLE1}}}-{{{VARIABLE2}}}

Dynamic Forms

Administrators can create [conditions](#) on forms using formulas and select list values to control whether or not a section is visible (e.g. selecting Yes from the Witnesses? dropdown menu on an Incident form will display the Witness Details section).

Visibility

☐ Always
☒ Only If

Available Components

Witnesses

Options and Values

Yes

✕

+ ADD RULES

Collapsible Sections

Form sections can now be made [collapsible](#) and expandable. Administrators can choose whether the section is collapsed or expanded by default and end users can collapse or expand the section by clicking the  and  icons.

Risks

Risk Likelihood

Rare

Risk Impact

Moderate

Tabbed Sections

Administrators can now add [tabs](#) on form sections to display specific elements only when an end user clicks that tab.

ControlsRisks

Control Effectiveness

Ineffective

Comments

Needs review.

Other Section Enhancements

Other [section](#) enhancements include:

- Configure the width of the section using radio buttons.
- Center a section on the form.
- Provide a section title.

Edit Form Section ✕

Section Width

☐ 25 ☐ 33 ☐ 50 ☐ 66 ☐ 75 ☒ 100

☒ ✕

 Centered

Section Title

☒ ✕

 Make Section Collapsible

Visibility

☒ Always ☐ Only If

☒ ✕

 Enable Tabs

Relationships & References Form Elements

- The [References element](#) now has the same functionality as the Relationships element, including the option of displaying the reference as a dropdown menu or table and the ability to search for or create new objects through the reference. Existing references will be read-only until an administrator changes the settings.
- Admins can enable or disable Search and/or Create functionality on the [Relationships](#) and References form elements.

Dropdown Format

☒ ✓

 Enable Search

☒ ✓

 Enable Create

Form Titles

A [title header](#) is now displayed at the top of the canvas for every configurable form, with the option of creating custom titles. By default, the title for new objects is “Create a New [Object Type]”, which is replaced by the value entered into the Name property once the form is created. Default titles can be edited by end users with the appropriate Edit permissions.

Edit Form Title

☐ Object Name
 ☒ Custom Name

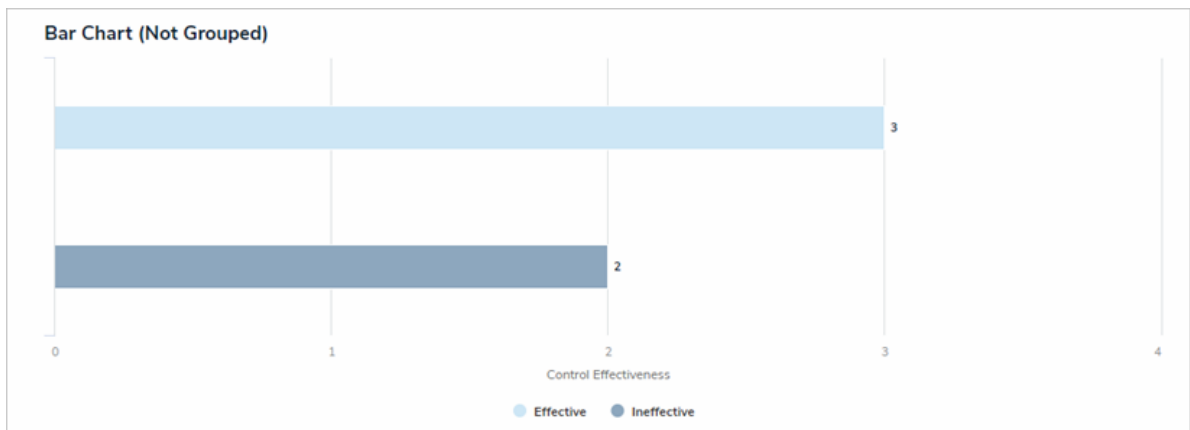
Form title

Incident Form

DONE

Bar & Column Charts

- When creating a [bar or column chart](#), admins are no longer required to select an object type or relationship to group the data. When the report data isn't grouped, the number of times a field, formula, relationship, or state appears on a single object is totaled on the chart.
- Admins can display a total count of the grouped data displayed in each bar or column.



Miscellaneous

- When users receive a Core-generated email about an object without a name, the object is identified by its unique ID.
- Data Import now supports multi-select lists.
- Users no longer use their current password when resetting it.
- Users can click the  icon when reviewing an object in a palette to view the object on its own page.
- Administrators can now rearrange how views appear in activities by dragging the  icon beside the view on the Edit Activity page.
- Pie charts and half-pie charts now display the workflow state, select list, and formula ranges in the order they were defined in the pie chart settings.
- The Name property on for objects now displays a header of “[Object Type] Name.”

Incident Name 

- Users no longer receive emails when they're imported into a new org.
- Various design enhancements and fixes.