Project Release Notes

Release 3.2 (February 2021)

What's new

Child section validation

Apply section-level validation rules with section-specific error messages and use aggregation functions to validate child sections' entries. You can create rules to compare the aggregate result of a child section with the following:

- Aggregate result of another / same child section
- Header section's field value from the same record
- Value entered by you

Consider the scenario where the performance appraisal form requires an employee to meet the target and stretch goal for several objectives each quarter to rank as 'Excellent' at the end of the appraisal period. Using child validation, you can define a rule on the 'Targets and stretch goals achieved' section to validate the eligibility when the manager ranks the employee and saves the record.

Child section validation rules are configurable in Create and Edit actions and are evaluated when the app users save their changes.

Read more...

Calendars

Support for Calendars is now available on Web client. App users can view and schedule their activities, access and update the associated records, and add new records directly from the calendar.

For instance, field service managers can view calendars for pending work orders and technicians schedules and assign work orders to available technicians.

Read more...

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Child section validation rules are configurable in Create and Edit actions and are evaluated when the app users save their changes.

Adding a rule

To add a child section validation rule, click 'New rule', choose 'Aggregate' in the newly introduced 'Rule type' popup, and enter a name for the rule in the Validation rule page. You can add one or more validation rules.

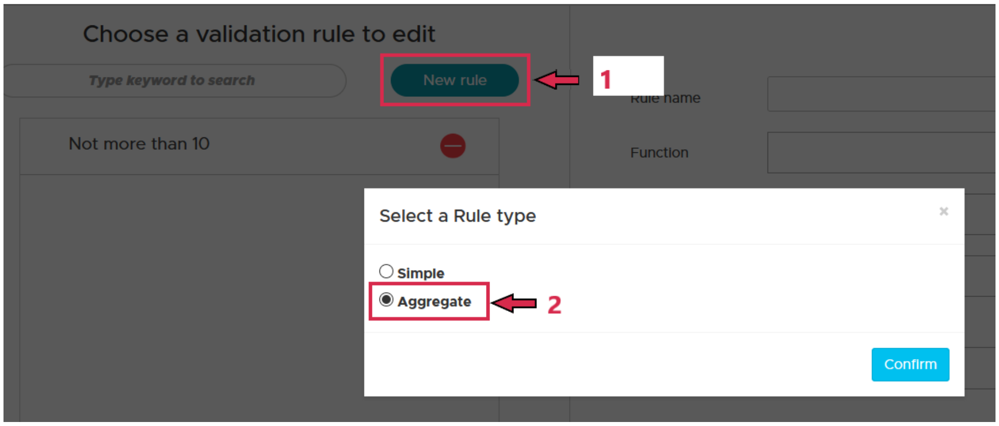

Figure 1. Choose 'Aggregate'

Configuring the rule

A child validation rule consists of four parts, as shown in figure 2 below:

1. Left-hand side expression (LHS)
2. Operator
3. Right-hand side expression (RHS)
4. Error message and error section

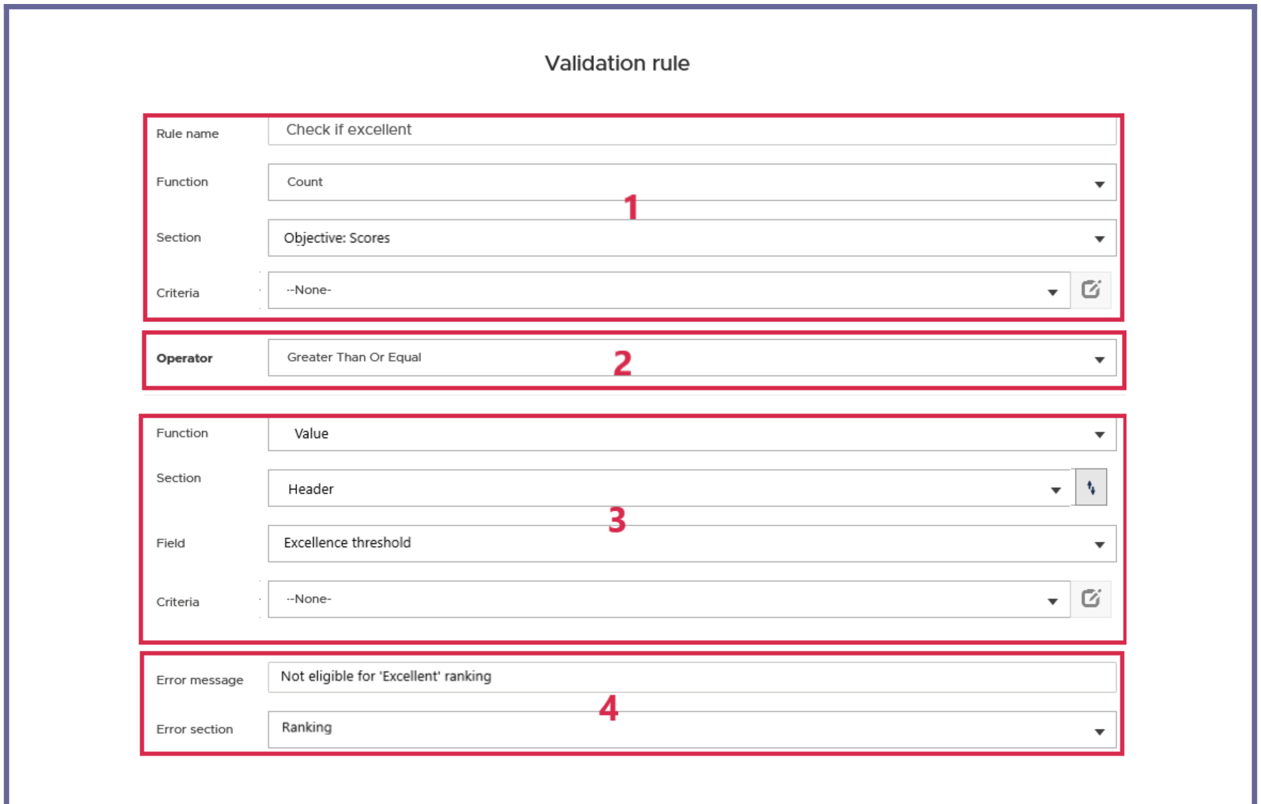

Figure 2. Configuring child validation rule

Aggregation functions

An aggregation function operates on a set of values and returns a single value. For instance, the aggregation function SUM() calculates the 'Amount' field's total value in all rows of the child section 'Expenses'.

The following aggregation functions are available:

Function	Description
Avg	Returns the average field value in the set of rows
Count	Returns a count of the number rows in the set
Max	Return the maximum field value in the set
Min	Return the maximum field value in the set
Sum	Returns the sum of field values in the set

Configuring the LHS expression

To configure the validation rule's LHS, choose the required aggregate function, a child section, and a child section field. You can apply the criteria to filter the records for aggregation as needed.

Note:

If you choose the count function, you will not see the option to select the field because it returns the count of all the records in the section.

Example:

Sum of Scores in the "Targets and stretch goals achieved" child section.

Choosing an operator

The following conditional operators are available, choose the operator as needed:

- Equal
- Not equal
- Less than
- Less than or equal
- Greater than
- Greater than or equal

Configuring the RHS expression

You can set an aggregate function, a header section field value, or enter a value in the validation rule’s (RHS) expression.

Setting an aggregate function

Configuring the RHS expression using an aggregate function is similar to the configuration for the LHS expression. Refer to the Configuring the left-hand side expression section.

Setting a header field

To set a field value from the header section of the current record, choose ‘Value’ from Functions, Header from the Section, and a header section field from Fields.

> **Note:**
>
> If you choose a header field, you will not see the criteria field because it only applies to the current record.

Entering a value

To enter a value, choose ‘Value’ from Functions, click the toggle in the Sections field, and specify the required value in the ‘Enter value’ field. Refer to Figure 3 below:

Figure 3. Setting a value in RHS

Configuring an error message

To add section specific error message, enter the required error message and choose the error section.

Support info

Supported Clients	Web client
Supported data sources	Flex and Oracle

Notes for app users

When you configure child section validations, the app users will see the error message displayed adjacent to the section where validation failed when they save the changes.

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For instance, field service managers can view calendars for pending work orders and technicians schedules and assign work orders to available technicians.

Opening the calendar

App users can access their calendars by clicking the calendar icon on the left menu bar and choosing from the calendar list.

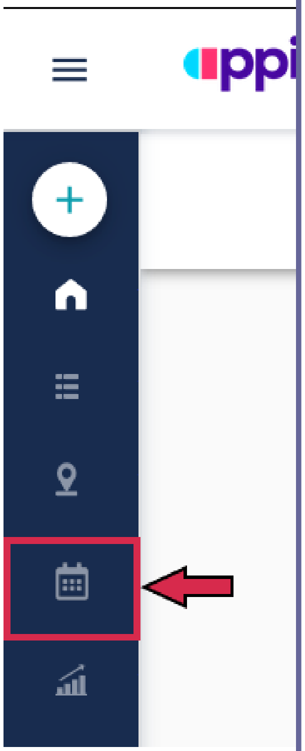

Figure 1. Calendars icon

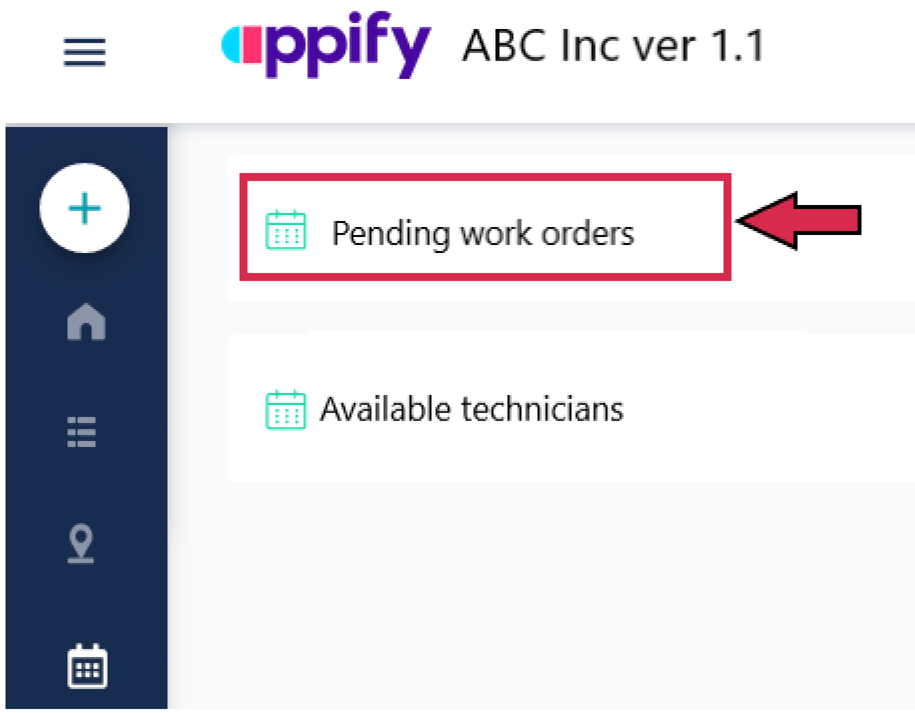

Figure 2. Choose a Calendar

Calendar layout

The calendar page has the following components (see figure 3 below):

1. The left panel
2. The middle panel
3. The right panel
4. The top menu bar

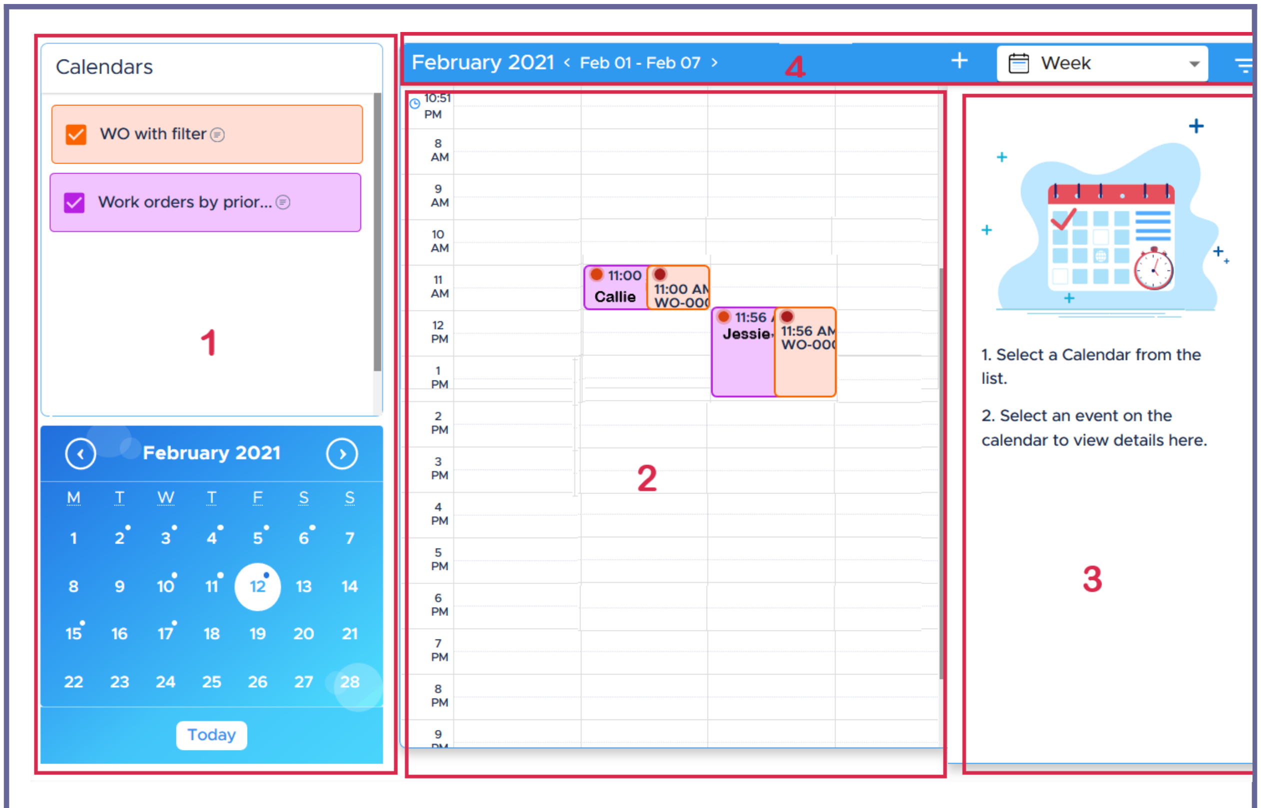

Figure 3. Calendar layout

The left panel

In this panel, users can select multiple calendars and choose a different date from the mini calendar.

The middle panel

The event grid is available here.

The right panel

The following components are available in the right panel for working with the record associated with the chosen event (see figure 4 below):

1. Actions drop-down: to run an action on the record
2. The bin icon: to delete the record

3. ‘View more details’ button: to view the record

A summary of the event appears here. The information is derived from the ‘Fields to display’ configuration for the calendar. The Event field maps to the Primary field value, and Date & Time to the ‘From DateTime’ field.

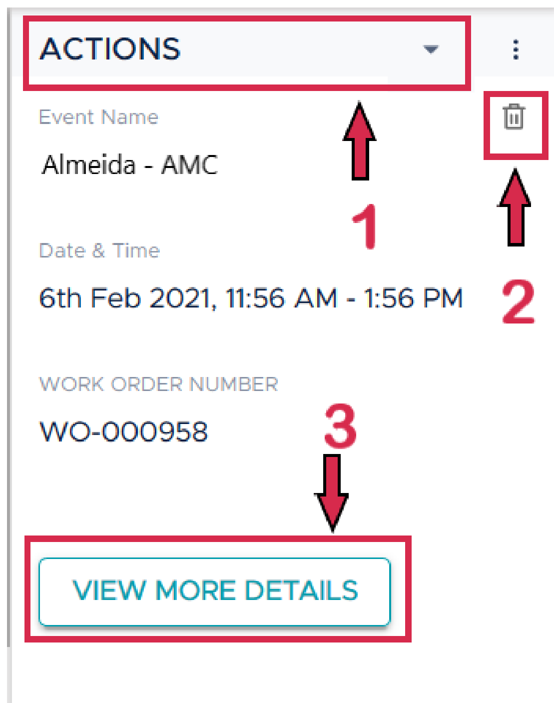

Figure 4. Calendar right panel

The top menu bar

The top menu bar has the following tools (see figure 5 below):

1. A label displaying the selected date, week, or date range
2. The Date / Range scroller for navigating to a different date or week
3. The create action icon for adding new records
4. The display mode selector for changing the event view
5. The filter icon for filtering displayed events

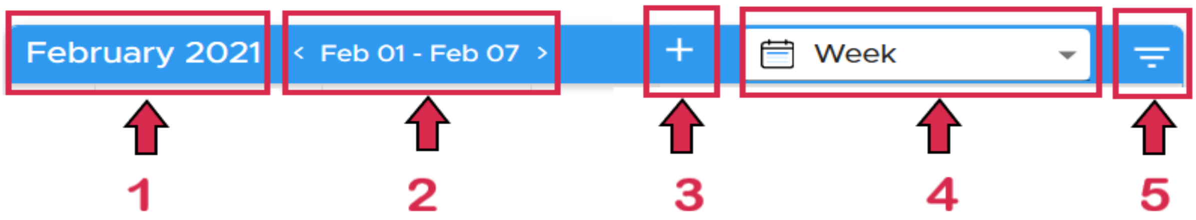

Figure 5. Calendar top menu bar

Changing the display mode

The following display modes are available for viewing the events:

- Day view: Events in a day (12 AM to 11 PM)
- Week view: Events in a week (Monday to Sunday), this is the default
- List view: Events in the selected date range

They can change the display mode using the display mode selector in the top menu bar.

Figure 6, 7, and 8 below show the events displayed in different modes:

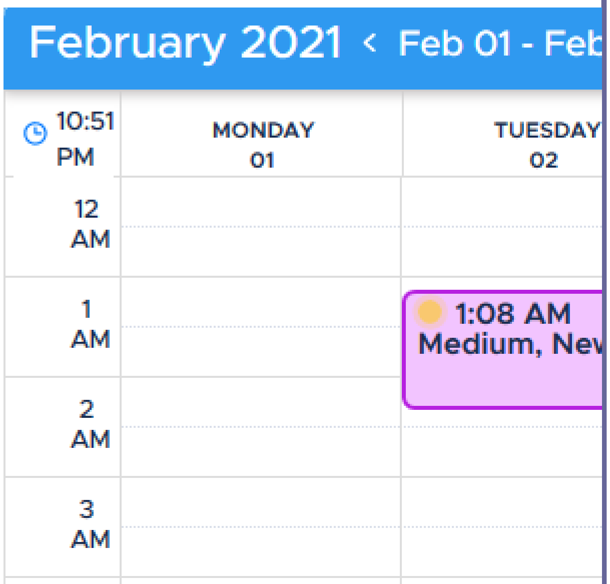

Figure 6. Week view

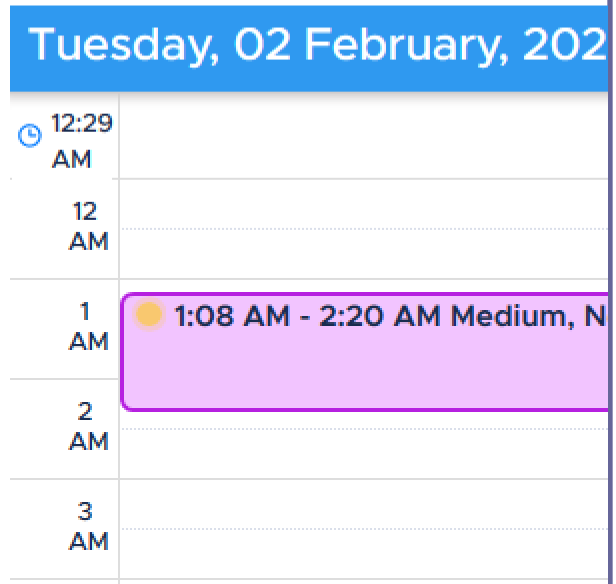

Figure 7. Day view

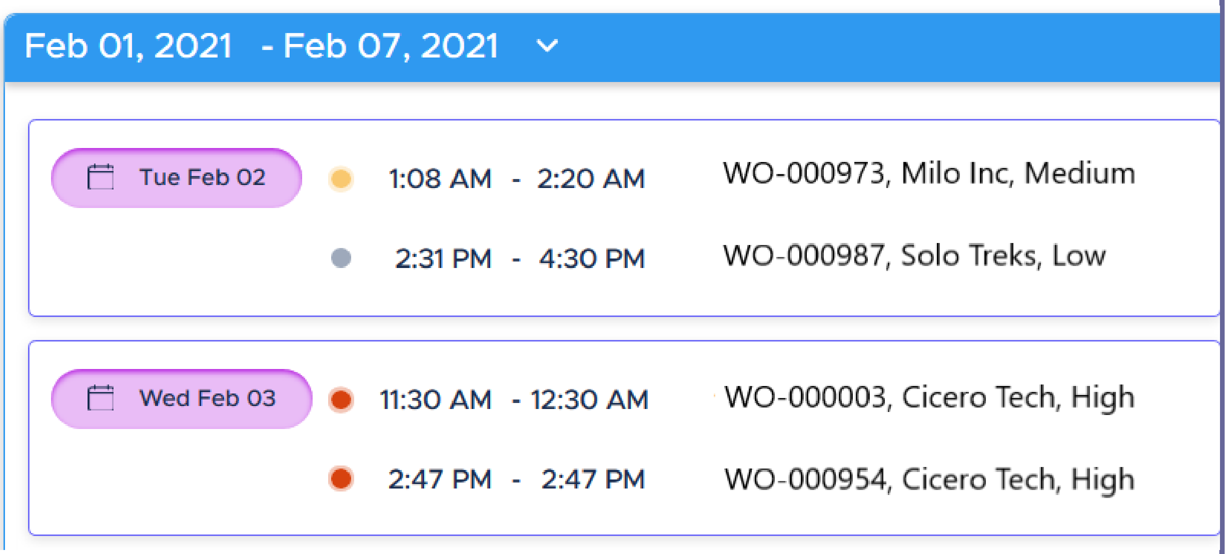

Figure 8. List view

Changing the date / week / date-range

The users can change the date, week, or the range for viewing events in the following manner:

- Scrolling through dates / weeks using the spinner in the day / week view
- Selecting a date span from the drop-down in the top menu bar by clicking and dragging the mouse over a continuous range of dates in the list view
- Clicking a date on the mini calendar

Viewing multiple calendars

To view multiple calendars simultaneously, users can select additional calendars from the list of calendars in the left panel. The following limits apply to the number of additional calendars user can select in different display modes:

- Day view - up to five calendars
- Week view - up to three calendars
- List view - no limit

Color-coding events

Events from the same calendar are displayed in the same color. App users can change the color scheme by clicking the pencil icon that appears when users hover over the calendar and choosing a color from the palette.

If there are color-code rules, a colored dot appears on the event label indicating the status. For example, if you configure a color rule to mark all high priority work orders in red, a red dot appears on the calendar event.

Filtering events

Users can also filter events displayed in a view by clicking the filter icon on the top menu bar (see figure 6 - item 5) and choosing a filter. The filters configured for the calendar are listed here.

Adding a record

App users can create a new record directly from the calendar by clicking the create icon and choosing a create action from the list that appears. The create actions that you have configured for the selected calendar/s will be listed here.

Deleting the record

Users can delete the record associated with the event directly from the calendar by clicking the event and using the bin icon from the right panel.

Viewing the record

Users can view the record associated with an event by clicking the event and using the 'View more details' button in the right panel.

Running an action on the record

Actions associated with the selected event's action flow are listed in the 'Actions' drop-down on the right panel. Users can open the action window by clicking the action in the drop-down.

Support info

Supported Clients	New in Web client. Already available on iPad, iPhone, and Android.
Supported data sources	Flex

Fixed issues

The following customer issues are fixed in this release:

Issue ID	Product area	Issue description
CD-1119	Web client	The Hide-when and Enable-when criteria in Silent actions were not getting evaluated. It always appeared/was disabled in the app even when the record matched the criteria.
CD-1137	Web client	Column titles in lists were incorrect on the app if you had added more than one reference field pointing to the same reference object. The reference object’s field name appeared in the title instead of the field name from the list’s main object.
CD-1155	Web client	Confirmation messages were displayed at the bottom of the action page where it was not obvious. It is now displayed at the top of the page when any silent action is executed.
CD-1166	Web client iPad	On the Lists page, the displayed lists were not sorted. It is now sorted alphabetically on the title field.
CD-1186	Web client	The Hide-when criteria in Silent actions didn’t get evaluated correctly. The Silent actions didn’t appear in the Actions panel on the app even when the Hide-when criteria did not apply for the record.

CD-1188	Web client, iPad	An error message "Something went wrong" was displayed to the users when they edited any reference field value in any List.
CD-1201	Studio	In the Object modeler, it was not possible to rename field labels for Oracle objects when the field type was converted to a reference field.
CD-1208 CD-1230	Studio	The configured external key was not getting set correctly as the primary key for the external object. Due to this, all records in a list became editable instead of just the records selected by the users.
CD-1209	Web client	In Create and Edit actions, if you configured a default value using USERINFO literal, the action page did not load correctly was when the users accessed the action.
CD-1228	Studio	In the Filter criteria configuration for List actions, the filter condition RHS field for entering the value did not load correctly. Due to this, it was not possible to add new filter criteria in Lists.
CD-1243	Web client	The list page did not finish loading records when the users clicked on any reference field. No records appeared on the page.