Contents

Version 21.01 (February 16, 2021) 4
New 4
Version 20.08 (June 14, 2020) 4
Bug fix 4
Version 20.01 (January 5, 2020) 4
Bug fix 4
Version 19.14.0.0 (October 16, 2019) 4
Changes 4
Version 3.4.0.0 (April 28, 2013) 4
Changes 4
Version 3.3.1.1 (February 20, 2013) 4
Version 3.3.1.0 (January 10, 2013) 4
Bug fixes 4
Version 3.3.0.3 5
Version 3.3.0.2 (November 15 2012) 5
Bug fixes 5
Version 3.3.0.0 (October 30, 2012) 5
New Features 5
More 'hops' 5
Recursive Query 5
Other Changes 5
Version 3.2.1.3 (July 25, 2012) 6
Changes 6
'Null' checking conditions 6
Version 3.2.1.2 (July 1, 2012) 6
Changes 6
Bug Fixes 6
Version 3.2.1.0 (June 21, 2012) 7
New Features 7
Proxy user name & password 7
Custom 'Between' date conditions- maximum flexibility 7
Other Changes 8
Bug fixes 8

Version 3.2.0.0 8
New Features 8
Double Click on the fields list 8
Sub-field search by typing <entity.field> 8
Using the organizational time zone for date/time fields 8
Other changes 9
Automatic open of 'Search' dialog 9
Improved field sorting by search text 9
Bug Fixes 9
Version 3.1.9.0 9
New Features 9
Convert durations fields to standard units 9
Ignore time part of date/time fields 9
Other changes 9
Version 3.1.8.2 10
Version 3.1.8.1 10
Bug Fixes 10
Version 3.1.8.0 10
New Features 10
Append to existing results 10
Bug fixes 10
Version 3.1.7.1 10
Bug fixes 10
Version 3.1.7.0 11
New Features 11
Auto-refresh results when loading workbook 11
New re-order buttons 11
Changes 11
Easier location of the fields 11
Un-grouping of related entity fields 11
ID fields 11
Reference to object fields that may reference several entities (like Case.Reported By) 11

clarizen

Excel Add-In Change Log

Version 21.01 (February 16, 2021)

New

You can pass custom URL and HTTP headers in the Excel Add-in, to:

- Work with your Clarizen Sandbox instance instead of your production instance
- Authenticate with an API gateway in your network

Click here for more details

Version 20.08 (June 14, 2020)

Bug fix

Adding "Effective From" to a Rate query resulted in an error

Version 20.01 (January 5, 2020)

Bug fix

Cannot query custom field billing code on the project object

Version 19.14.0.0 (October 16, 2019)

Changes

The Excel Add-in now works with TLS version 1.2. The add-in no longer supports versions 1.0 and 1.1

Version 3.4.0.0 (April 28, 2013)

Changes

Sub class specific fields can be retrieved (added to the 'select fields') from a super class object/query.

For example: on a Timesheet query you can retrieve Task specific fields (like Task Type) of the work item (e.g. *Work item.Task Type*).

Note: Sub class specific fields are not available in the filter (e.g. you cannot filter Timesheet by *Work item.Task Type*).

Version 3.3.1.1 (February 20, 2013)

Changes

Maximum number of items per query was increased to 30,000.

Version 3.3.1.0 (January 10, 2013)

Bug fixes

Columns representing Clarizen text fields are now formatted as 'Text', so text values containing digits only and beginning with '0' (like '0987') are not truncated.

Other Changes

The default value for maximum no of results was changed to 1,000.

Version 3.3.0.3

Bug fixes

Fixed - Conditions with 2 hops (x.y.z) were incorrectly handled on certain scenarios.

Version 3.3.0.2 (November 15 2012)

Bug fixes

1. For queries written before version 3.3.0.0 with reference to objects field on the second level – add .ObjectID
2. Multiple type reference to objects field sub fields (like Note.AttachedTo.DisplayName) were not correctly processed and caused warnings for non-existent field.

Version 3.3.0.0 (October 30, 2012)

New Features

More 'hops'

You can now retrieve fields up to 5 moves from the original entity.

Conditions can be set up on fields up to 2 moves from the original entity.

This greatly simplifies many queries that previously had to be split and joined. For example on a Timesheet query you can:

1. Set a condition on 'Work Item.Project.Start Date'.
2. Include Work Item.Project.Manager.Display Name on the result.

Recursive Query

For Work Item entities (Work Item, Task, Milestone, Project) and User Group entity, you can run a recursive query that will retrieve all sibling work items from a 'parent' point.
This comes in handy when you have a hierarchical project structure and you want to retrieve all work items in the hierarchy.

Just check the 'Recursive' check box, select the parent work item and continue.

Note: Custom sorting is currently unavailable when using Recursive Query.

Other Changes

1. Pivot table refresh is performed only once only after all queries have been refreshed (when 'Refresh All' is used).

2. Referenced entities fields appear in the full name on the filter condition text box.
3. A help link was added on the Query form.

Version 3.2.1.3 (July 25, 2012)

Changes

'Null' checking conditions

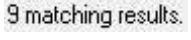
All field types now support 'Is Null' and 'Is Not Null' conditions (except for References and Pick Lists which use the 'Is Blank'/'Is not Blank' conditions instead)
A 'Null' value means the field does not contain a value, so all value based conditions (including 'Not Equals') on that fields won't return Null values.

Example: You create a custom field of type Check Box. All existing entities will have a 'Null' value on that field. A Null value is neither True nor False, so even a "Not Equal 'true'" condition leaves these entities out of the result.
If you want to set up a condition for all non-checked values use
Or {field Is Null, field Equals False}

Version 3.2.1.2 (July 1, 2012)

Changes

1. When you click 'Refresh All" the queries are run sequentially (not simultaneously). This should resolve possible stability issues and clarifies confusion when some of the queries have run-time parameters.
   Screen updates are paused until the query completes.
2. The 'Entity Search' form (shown when using 'One of' condition) shows an indication if only partial results are

displayed or the number of results that 

match the search string Results are sorted by:
   a. Whether the entity's name **starts** with the search string.
   b. Alphabetically

   Example: when searching for 'Clarizen' the order of results would be:
   Clarizen abc *(names beginning with 'Clarizen' precede the rest and sorted alphabetically)*
   Clarizen bcd
   A Project that uses Clarizen a *(normal alphabetical order)* B
   Project that Clarizen uses.

Bug Fixes

1. In accordance with Excel's limitations, values longer than 32767 characters (typically Notes/E-mail texts) are cropped.

Version 3.2.1.0 (June 21, 2012)

New Features

Proxy user name & password

If you use a proxy server and the user name/password for the proxy are **NOT** your Windows credentials, you may enter them in the Login Form.

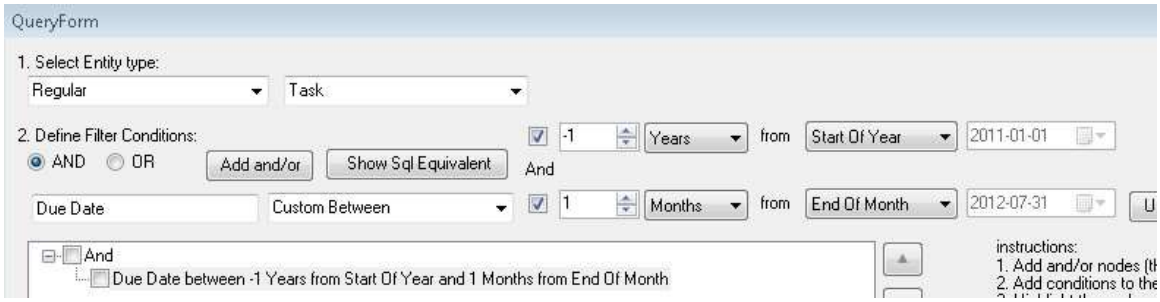
The proxy password is saved in your computer, encrypted, like your Clarizen password. If you checked 'Remember my password' your proxy password is saved for the same period as your Clarizen password.

Note: *In most cases the proxy user name and password are the same as your Windows credentials. Leave the user name/password fields blank unless you know they aren't. Consult with your IT department if you need more information on your organizational configuration.*

Custom 'Between' date conditions- maximum flexibility

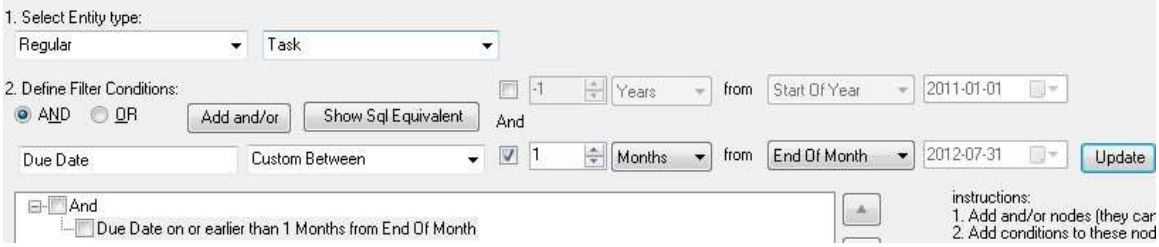
The Excel add-in comes with many built in date filters. If you need one that's not on the list you may select 'Custom between' date filter to create a dynamic relative date filter. For example, if the date range you need is from beginning of last year to the end of the following month you'd enter:

1. 'Custom between' on the operator combo box
2. "-1 Years from Start of year" on the first (From) date.
3. "1 Months from End of Month" on the second (To) date.



Notes:

A. Negative numbers are allowed to specify 'Before' the date.
B. Specifying 'X month from End Of Month' always results in the end of a month (1 month from End Of Month when the current month is June would result in the end of July, even though June has 30 days and July has 31)
C. Clear the appropriate check box on the left if you just need 'From' or 'To' condition.



D. You may also specify a fixed date.

Other Changes

- The query form's design was slightly changed to better fit lower vertical resolution screens (like Laptops). A scroll bar is introduced if required.
- The runtime filter form was expanded to accommodate *custom between* date filters.

Bug fixes

1. Bug fixed when editing a 'Me' or 'Not Me' condition.
2. A false notification about nonexistent fields was fixed for 'Resource Link' query.

Version 3.2.0.0

New Features

Double Click on the fields list

On the result fields, you can double click a field to move it to the selected/available fields.

Tip: *If you double click on an entity/pick list field (like 'Project', 'State' or 'Manager' on a 'Task' query) the entity's name field (may be 'name' for most entities, 'display name' for users or 'Object ID' for pick lists) will be added to the selected fields.*

Sub-field search by typing <entity.field>

On the 'quick search' boxes (both filter and field selection) you can search for a sub field (like 'Project.Due Date' on a *Task* query) by typing the <entity.field> partial search texts (like 'Proj.Due').

Using the organizational time zone for date/time fields

We have a new option ('on' by default) to use the organizational time zone for all date/time filters and field values.

This is especially important for organizations working in multiple time zones. Using the organizational time zone ensures the results are the same in Clarizen and the Excel add-in (and in all time zones).

Note: *If you switch off 'Date/time in organizational time zone' all date/time filters and values will be use your local time zone. This may result in a shift of a day for some values. For example, for an organization working in PST (Pacific) time zone, a task with a due date of <June-30th 5Pm PST> may appear as having a due date of <July-1> if your local time zone is CET (Central Europe). In Clarizen, however, the task's due date will always show <June-30>.*

Other changes

Automatic open of 'Search' dialog

When you select 'One of' or 'Not One Of' condition operator, the search box will open automatically.

Improved field sorting by search text

Entities containing the search string will appear before entities with sub fields containing the search string. For example, if you typed 'Project' the '*Project*' field will appear **before** 'Created By' (which has a sub field of '*Subscribe to **project** notifications*')

Bug Fixes

1. For link entities, all possible link entities are now shown on the filter selection and on the fields' list. For example, when *Group Hierarchy Link* is selected, you can filter by the 'Member' field as either a *User* or a *User Group*.
2. Editing a 'Not One Of' condition showed 'One Of' in the operator combo.

Version 3.1.9.0

New Features

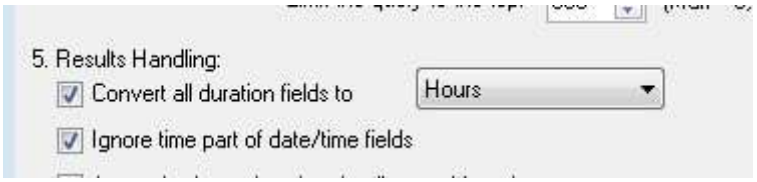
New date filters

We've added new date filters: "Next 6 months" and "Previous 6 months".

Convert durations fields to standard units

Clarizen allows you to enter durations (like a task's "Work" or "Duration") in various units: hours, days, weeks etc. For reporting purposes, however, you may want to use the same unit for all.

The new version does that for you. When 'Convert all duration fields to' is checked on the query form (on by default) all duration fields are converted to the unit specified. Conversion is based on the Clarizen organizational calendar settings (for no. of hours per day, days per week, etc.).



Ignore time part of date/time fields

Clarizen maintains the time for many date fields, like a tasks Start/Due date.
For reporting purposes, however, this may result in different values for items on the same day, making it difficult to filter or group results by date. When 'Ignore time part of date/time fields' is checked (on by default) you only get the date part in Excel, making it easier.

Other changes

1. Weeks start for week filters (like 'last week') is taken from the Clarizen organizational calendar settings. The Login -> Settings menu was removed.
2. The ribbon now displays your Clarizen display name (not your user name).

Version 3.1.8.2

Bug Fixes

1. When typing a value in the entity 'Search' form, the form may become unresponsive.

Version 3.1.8.1

Bug Fixes

2. Simple 'Hop' conditions produce an error message.
3. Runtime version has developer features.

Version 3.1.8.0

New Features

Append to existing results

This feature allows you to build large or incremental reports on the same worksheet.

When 'Append to existing results' is checked on the query form, each time you refresh the report the results are added to the existing results on the worksheet (instead of clearing worksheet before refresh is performed).

The query definition should include a run-time parameter, and/or a sort field so different results are retrieved each time you refresh the report.

To prevent duplicates, any result line that already exists, is replaced. For this purpose, the 'Object ID' field is required (and is automatically added when you check 'Append to existing results').

Checking 'Append to existing results' disables changes to the result fields' definition when you edit the query, so new results can be consistent with existing results. If you need to make changes, you should clear 'Append to existing results'. You may then re-check 'Append to existing results', but if changes (other than adding new fields at the end) were made, the existing results would be cleared before refreshing the report.

Bug fixes

1. When opening a new workbook, login is no longer required unless the workbook contains queries that need to be refreshed automatically.
2. The add-in logs in automatically if the Clarizen session is expired.

Version 3.1.7.1

Bug fixes

1. 'Hop conditions' (conditions based on related entity fields) in workbooks that were written before version 3.1.7.0 are properly re-calculated

Version 3.1.7.0

New Features

Copy query

This new feature enables copying of an existing query to a new worksheet.

Auto-refresh results when loading workbook

Checking this check box on the query definition form would automatically refresh the query when the workbook is opened.

New re-order buttons

On the result fields box - we've added 'move to first' and 'move to last' buttons to facilitate reordering of fields.

Changes

Easier location of the fields

On field lists (result fields and condition fields) the main entity fields appear first, and related entities next. For example if you query 'Tasks' and type 'name' in the quick search box, you'll see the 'Name' (of the task) field before the '+ Active Stopwatch' (representing the Active Stopwatch name).

Un-grouping of related entity fields

On the result fields box - related entity fields are no longer grouped together. You may order fields of related entities anyway you prefer. Related entities fields appear as 'Entity.Field' - for example 'Parent Project.Name'

ID fields

The 'Object ID' and 'Type Name' fields are now available for all related entities on the result fields. This enables you to cross reference the ID on a different worksheet.

Reference to object fields that may reference several entities (like Case.Reported By)

1. These fields appear twice in the condition editor, once for each entity type, so you can create a condition that is specific to the referenced entity type.
   We have, however, an API bugs that prevents this from actually working if the referenced entity is a super entity (like Case or Work Item).
   This bug will be fixed on one of the coming Clarizen versions.
2. For these fields you will now see all possible fields (from all referenced entities) on the result fields. This allows you to show related entity fields that were unavailable until now (for example, Related Entity.Name for a Note/Email)
   However, if the referenced entities of the results contain invalid fields - your query will fail. For example, if query Notes and you ask for 'Related Entity.Originated From' (an Issue only field) and your results contain notes attached to work items (that don't have this field), your query will fail.
   This bug will be fixed on one of the coming Clarizen versions.