



OrgPublisher OrgHistory

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# OrgHistory

The OrgHistory function provides a scheduled method for preserving hierarchical information over time. Archived charts, along with the Compare two charts feature, create a report history of changes over a range of time for either a specific arm of your organization or for the whole company.

## Technical notes

- Archiving should be done as frequently as publishing
- Archived files are signed to verify that data has not been modified since the file was generated
- Compared charts must have the same field layouts (number of custom fields, order of custom fields, and types of custom fields) to report properly

## ***Position ID and Custom Field Type***

A unique identifier number for each record across all charts, including open positions, should be created. This number remains with that person/record at all times. A custom field type of **Position ID** is available for use in comparing and reporting on planning files. You can map to this field or pass your data into this **Field 17**.

**Note:** If the charts you are comparing do not contain a custom **Position ID**, OrgPublisher uses the employee ID in **Field 5**. If neither of these fields contain data, then an error message lets you know that no comparison has occurred.

## Archiving a Chart

1. Select **Tools** in the menu then **Manage OrgHistory Archives** from the options list. You can also click the Manage OrgHistory Archives button in the toolbar.

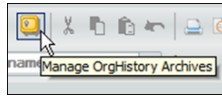


Figure 1.

The OrgHistory Archives dialog opens to the **Definitions** tab.

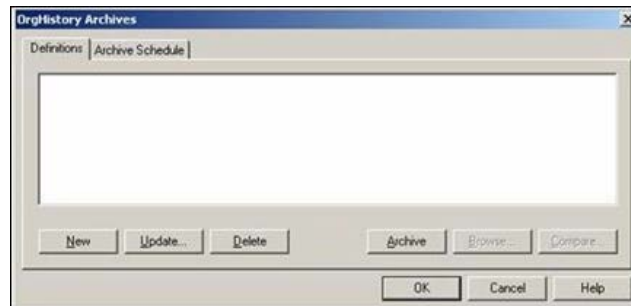


Figure 2.

2. Click **New** to set up your archiving schedule using the OrgHistory Archive Wizard.
3. Type or **Browse** to the archive folder path.

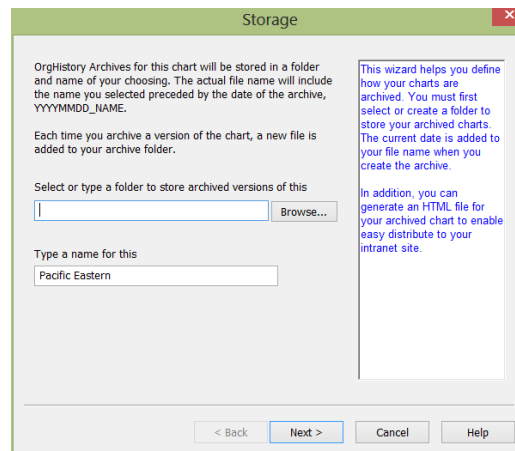


Figure 3.

4. Type a name for the archive or accept the default name and click **Next**.

- If applicable, select the **Password protect the chart** check box and provide the password and encryption information. Click **Next**.

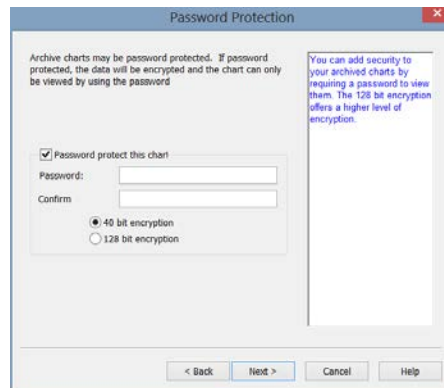


Figure 4.

- We recommend that accept the **Sign archived charts** default to verify that the chart data has not been changed and cannot be changed in this archived version.

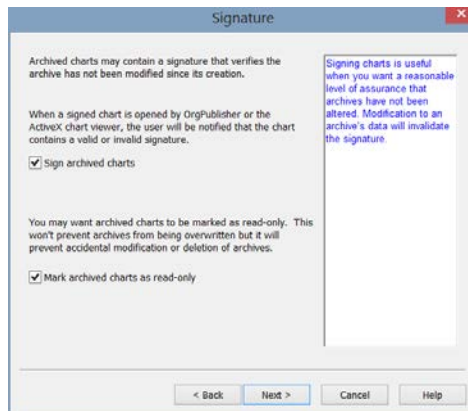


Figure 5.

- We recommend that you accept the default option of read-only. Click **Next**.
- If you want to archive only a part of the chart, and have selected a box within the chart that was not the top of the chart, select **Exclude positions above**.



Figure 6.

If you have selected a box within the chart that is not the top of the chart, but you want to archive the whole chart, click **Reset Starting Box**. Click **Next**.

9. Select when you want to archive the chart or if you want to set up a schedule. Click **Finish**.

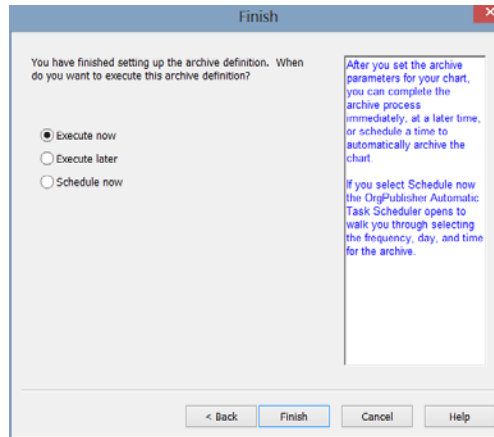



Figure 7.

## Scheduling an Archive

If you selected **Schedule now** in the [OrgHistory Archive Wizard](#), the OrgPublisher Automatic Task Scheduling Wizard opens.

1. Click the Manage OrgHistory Archives button  in the toolbar and selecting **Archive Schedule** tab of the OrgHistory Archives dialog. Click **New**.

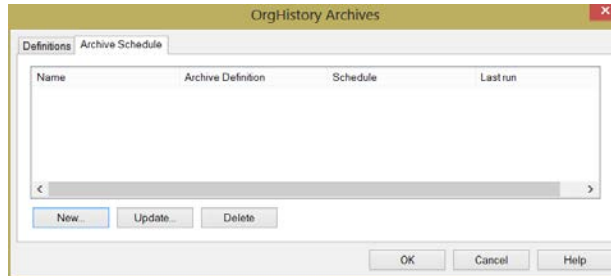


Figure 8.

2. In the OrgPublisher Automatic Task Scheduling Wizard, click **Next** in the first dialog
3. Type the **Name** you want to assign to the schedule and click **Next**.

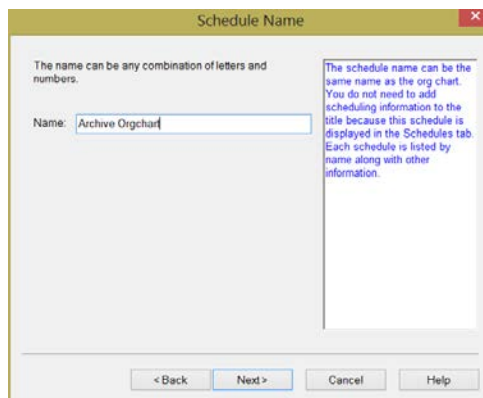


Figure 9.

4. Select the publishing definition you want to schedule and click **Next**.

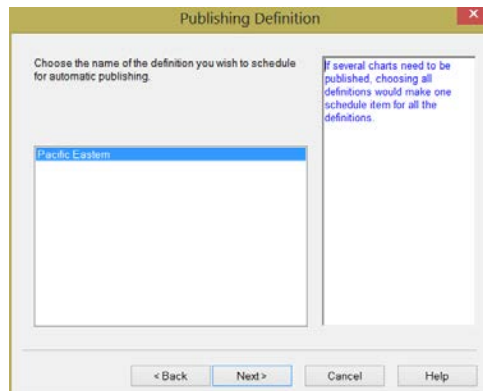


Figure 10.

5. Select the frequency you want to assign to the scheduled task and click **Next**.

**Schedule Frequency**

Select Daily to run your task more than once a week.

Select Weekly to run the task once a week, but more than once a month.

Select Monthly to run the task once a month, but more than once a year.

Select One time only if there is no need to run the task more than once.

Schedule your task:

One time only  Daily

Weekly  Monthly

If you are uncertain how often to run the task, the least frequent schedule is monthly.

You can change a schedule by selecting it from the Schedules tab and then clicking Update

< Back **Next >** Cancel Help

**Figure 11.**

6. The Schedule dialog options vary depending on the frequency you selected in the previous dialog.

**Daily Schedule**

You may select to automatically run the task every couple of days or select to publish every weekday.

Every 1 day(s)

Every weekday (will convert to a weekly schedule)

Select the time of day:

2:13:00 PM

Select the date:

5/28/2014

To run your task during the week, select **Every weekday**.

To run your task every day, select **Every 1 day(s)**. To run your task every other day, select **Every 2 day(s)**.

To run your task when you are not using your machine, select a time in the early morning or late evening.

**Remember:** Your machine must be on but you do not need to be logged on at the scheduled time for a task to automatically run.

< Back **Next >** Cancel Help

**Figure 12.**

Make your selections and click **Next**.

7. Provide your user name and password and click **Next**.

**User ID**

Before your task can be automated, you must type a valid name and password.

The user name you type must be a member of the Administrator group for the machine on which the schedule is run.

Type user name:

Type password:

Confirm password:

< Back **Next >** Cancel Help

**Figure 13.**

8. Verify the schedule information is what you want and click **Finish**.

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## Using Archived Charts

The chart administrator can browse through a list and open archived charts. You can also compare two chart and produce a report of differences between them.

### Browsing

1. In the OrgHistory Archive dialog, select an archive definition and click **Browse**.

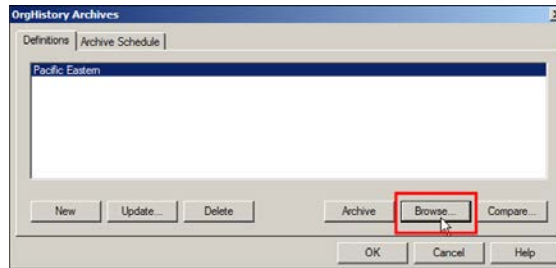


Figure 14.

The OrgHistory Archive Browser opens.

2. Select an OrgHistory file from the right pane and click **View**.

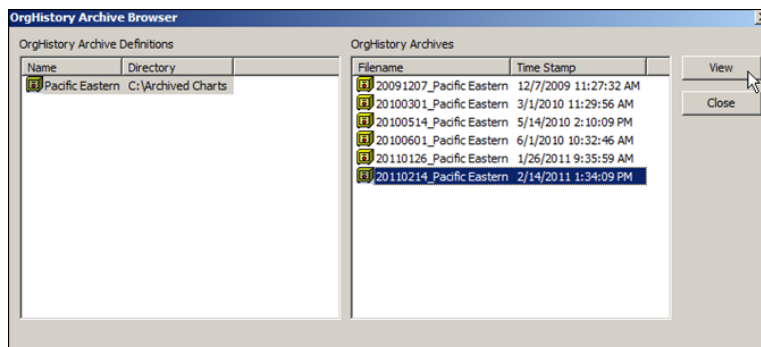


Figure 15.

3. If prompted, type the password to view a locked archived chart.

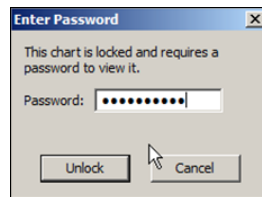


Figure 16.

- Click **OK** if a message displays indicating that a signed archive cannot be saved.

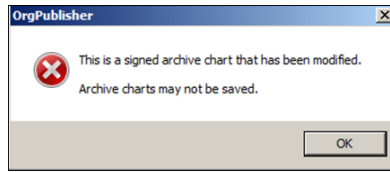


Figure 17.

The requested archived chart opens in your browser. The file name displays in the browser address field, with the date preceding the name.

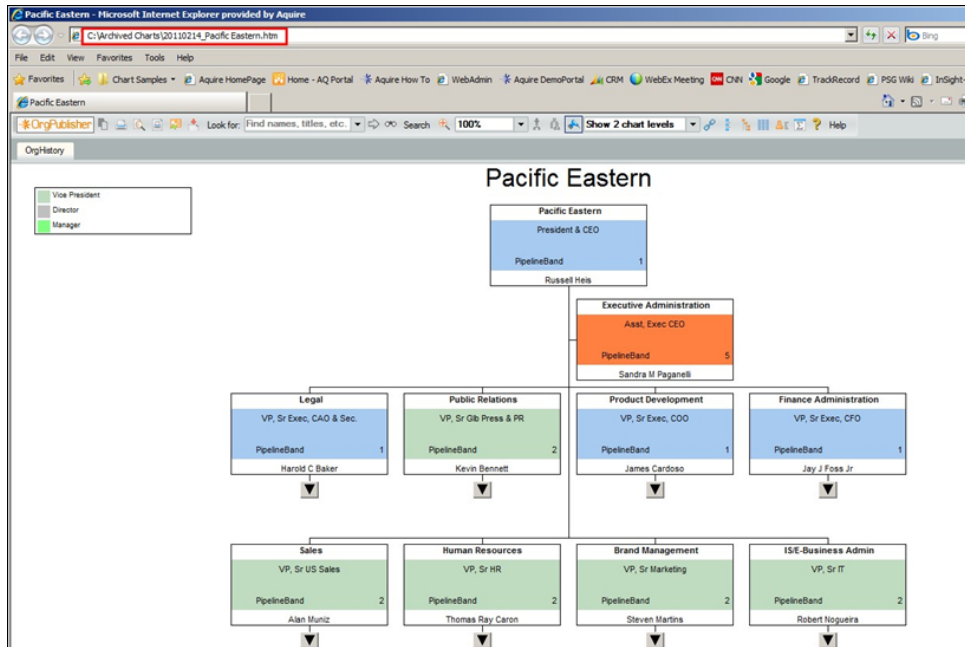


Figure 18.

## Comparing

- In the OrgHistory Archives dialog, click **Compare**.

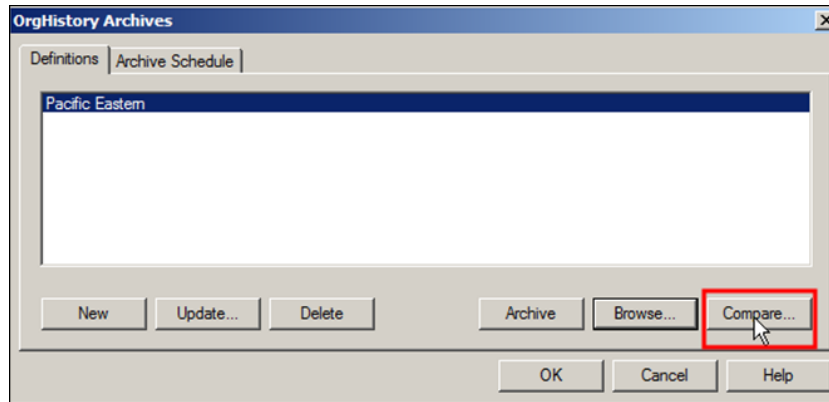


Figure 19.

2. Select the first file you want to compare, then hold down the **Ctrl** key and select the second file. Click **Compare**.

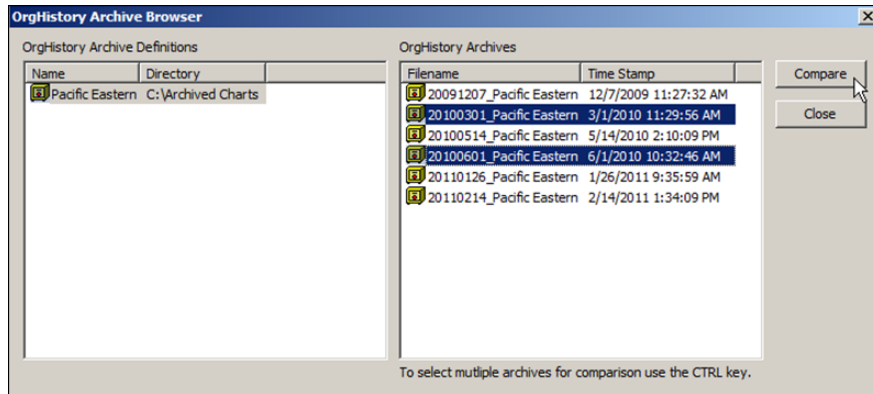


Figure 20.

3. Select the output options you want, the format of names, and how you want to view the report.

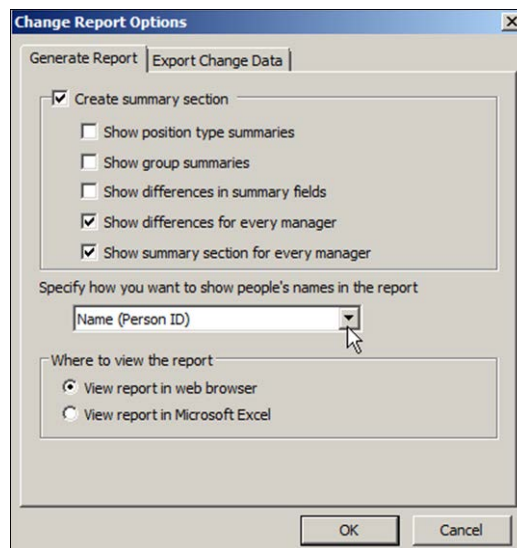


Figure 21.

4. If prompted, type the password to view a locked archived chart.
5. Click OK if a message displays indicating that a signed archive has been modified.

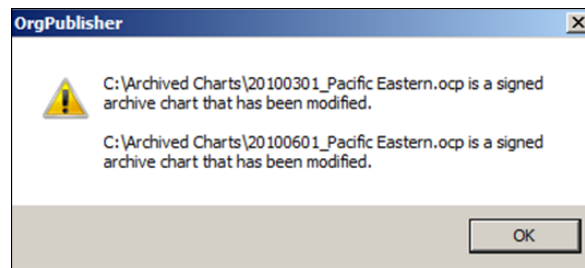
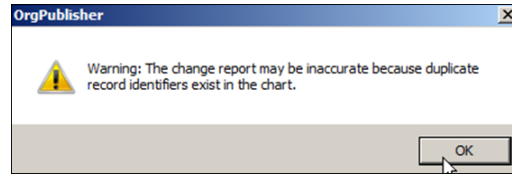


Figure 22.

6. Click **OK** if a message displays about people in the chart holding more than one position type. This occurs if you did not use unique Position IDs in the chart, forcing OrgPublisher to rely on Employee ID data for tracking. If two records have the same employee ID, OrgPublisher might not accurately display the correct record involved in a move or delete action.



**Figure 23.**

The comparison report opens. See the section on [Comparison Report](#) output samples for a synopsis for each output section.

## Comparing Two Charts

1. Select **Tools** from the menu then **Compare two charts** from the options list.

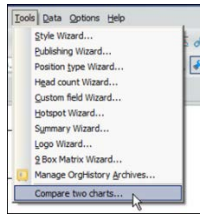


Figure 24.

2. **Browse** to the file location for charts you want to compare.

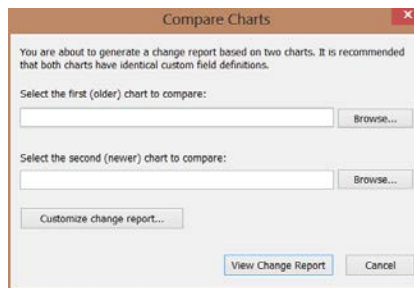


Figure 25.

3. If applicable, click **Customize change report** and click **OK**.

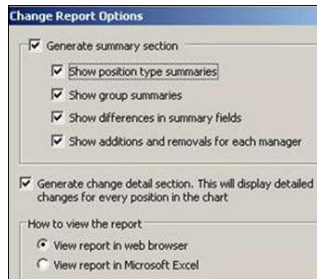


Figure 26.

The change report opens to the summary in either a browser or spreadsheet, depending on your selection.

Summary of changes for 2004 - 2005			
General summary for chart			
Position type summary	Before	After	Change (%)
Indirect Report	4	4	0 (0%)
Open position	13	14	1 (7%)
Manager	27	27	0 (0%)
Employee	57	56	-1 (-1%)
Assistant	10	10	0 (0%)
Contractor	3	3	0 (0%)

Figure 27.

## Comparison Report Output

You, as the chart administrator, can choose to display several sections in the change report.

### General Summary – Chart

The summary options selected display the position type names, then the group names, and the differences in the summary fields for the whole chart. A summary of changes for each box is also displayed in this report.

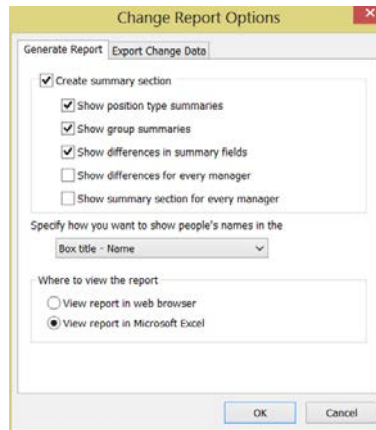


Figure 28.

Summaries display the counts **Before** (in the oldest chart) and the counts **After** (in the newest chart). The percentage of the change is also displayed.

	A	B	C	D
4	General summary for chart			
5				
6	Position type summary	Before	After	Change (%)
7	Open position	27	60	33 (122%)
8	Manager	60	61	1 (1%)
9	Employee	959	935	-24 (-2%)
10	Assistant	11	11	0 (0%)
11	CEO	1	1	0 (0%)
12	Sales Mgr	1	1	0 (0%)
13	Sales Team	92	82	-10 (-10%)
14	Vice President	20	20	0 (0%)
15	Sales Rep	84	84	0 (0%)
16	Director	28	27	-1 (-3%)
17				
18	Group summary	Before	After	Change (%)
19	Everyone	1283	1282	-1 (0%)
20	Executives	4	4	0 (0%)
21	Vice Presidents	18	18	0 (0%)
22	Directors	29	28	-1 (-3%)
23	Managers	65	65	0 (0%)
24	Employee	1167	1167	0 (0%)
25	Absences	589	660	71 (12%)
26	Sales Reps	91	91	0 (0%)
27	Software Sales Reps	69	69	0 (0%)
28	Hardware Sales	22	22	0 (0%)
29	TimeToFill	30	53	23 (76%)
30	OpenPositions	27	60	33 (122%)
31	Low Performers	23	23	0 (0%)
32	High Performers	408	405	-3 (0%)
33	MidPerformers	852	854	2 (0%)
34				
35	Data summary	Before	After	Change (%)
36	Hardware Sales	\$1,999	\$1,999	\$0 (0%)
37	Total Absences	2,014	2,053	39 (1%)
38	Avg Time To Fill	20	24	4 (20%)

Figure 29.

## General Summary – By Manager

By selecting Show differences for every manager, the same information as above is included in the change report but is now listed for each manager in the chart.

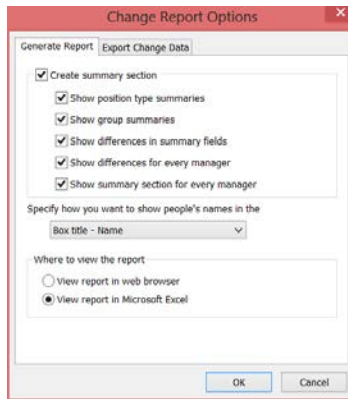


Figure 30.

The summary displays the position type names, the group names, and the differences in the summary fields for the whole chart. In addition, a summary of each box is also included.

Summary of changes for Sales - Sales - Alan Muniz				
926				
927				
928	Position type summary	Before	After	Change (%)
929	Open position	10	20	10 (100%)
930	Sales Team	92	82	-10 (-10%)
931				
932	Group summary	Before	After	Change (%)
933	Absences	95	113	18 (18%)
934	TimeToFill	12	11	-1 (-8%)
935	OpenPositions	10	20	10 (100%)
936				
937	Data summary	Before	After	Change (%)
938	Total Sales	\$97,295,200	\$91,295,200	-\$6,000,000 (-6%)
939	Software Sales	\$86,580,000	\$80,580,000	-\$6,000,000 (-6%)
940				
941	Subordinate change detail			
942	Added U.S. Strategic Sales - U.S. Strategic Sales - Della Bentley			
943	Removed U.S. Strategic Sales - U.S. Strategic Sales - Thomas Rishty			

Figure 31.

## Position Modifications

Each of the above summary options provides a detailed list of changes for each box in the chart.

The following positions were modified			
1285			
1517	Creative Services - Creative Services - Mary Kelley	From Creative Services - Creative Services - Hana Yorke	To Brand Management - Brand Management - Steven Martins
1518	Has a new manager	Creative Services	Creative Services
1519	Moved to different box	Mgr, Creative Prd Svcs	Dir, Sr Creative Svcs&Merc
1520	Moved to a different job	Manager	Director
1521	Job type was modified	4	3
1522	Changed PipelineBand	1	2
1523	Changed Absence		

Figure 32.