

PeopleFluent OrgPublisher 21.04 Release Notes

Document Version: 1.0

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New to PeopleFluent OrgPublisher

PeopleFluent is pleased to announce the upcoming PeopleFluent OrgPublisher 21.04 update. If you have any questions about the resolved issues presented in this document, please contact your PeopleFluent representative.

Document Revision

This section lists the initial publication and any changes or updates that follow.

Table 1: Revision Information

Revision Information	
Revision Date:	May 14, 2021
Document Version Number:	1.0
Details of Revision:	Initial publication.

Features and Enhancements

The features and enhancements described in this section apply to PeopleFluent OrgPublisher and will be available when the client is upgraded to this version.

Because PeopleFluent OrgPublisher is configurable per client, new features may affect each client's individual implementation differently. For more information about any new feature, and how it can be used in specific implementations, contact your PeopleFluent representative.

Field Bulk Editor

Functionality

This enhancement allows users with the appropriate permissions to edit properties on multiple fields at once.

Details

Users with the appropriate permissions can now edit some field properties on multiple fields at once using the Field Bulk Editor. The Field Bulk Editor page has two sections: Field Selector and Properties Panel.

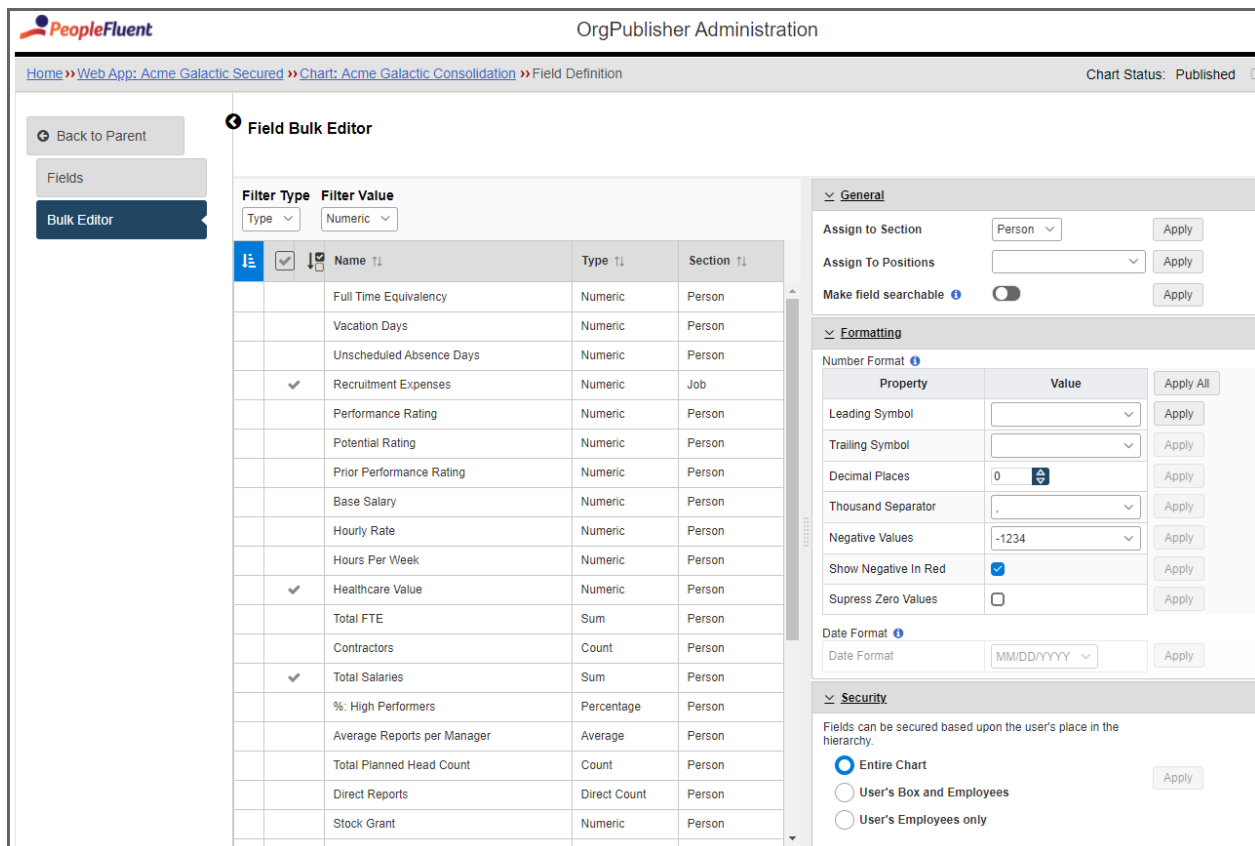


Figure 1: Field Bulk Editor Page

Field Selector

Use the Field Selector section to filter fields by name, type, assigned to positions, and assigned to section. Fields can be sorted by the default sort order, selected fields, name, type, or section.

Properties Panel

The Properties Panel has three sections:

- **General:** Use this section to assign fields to a section, positions, or make them searchable.
- **Formatting:** Use this section to assign formatting to numeric or date fields.
- **Security:** Use this section to modify field security.

Configure Default Position Type

Functionality

This enhancement allows chart administrators to configure a default position type when a record in a data source does not contain a value in the Record Type field.

Details

Chart administrators can now use the Default Position Type field on the General tab to configure a default position type when a record in a data source does not contain a value in the Record Type field.

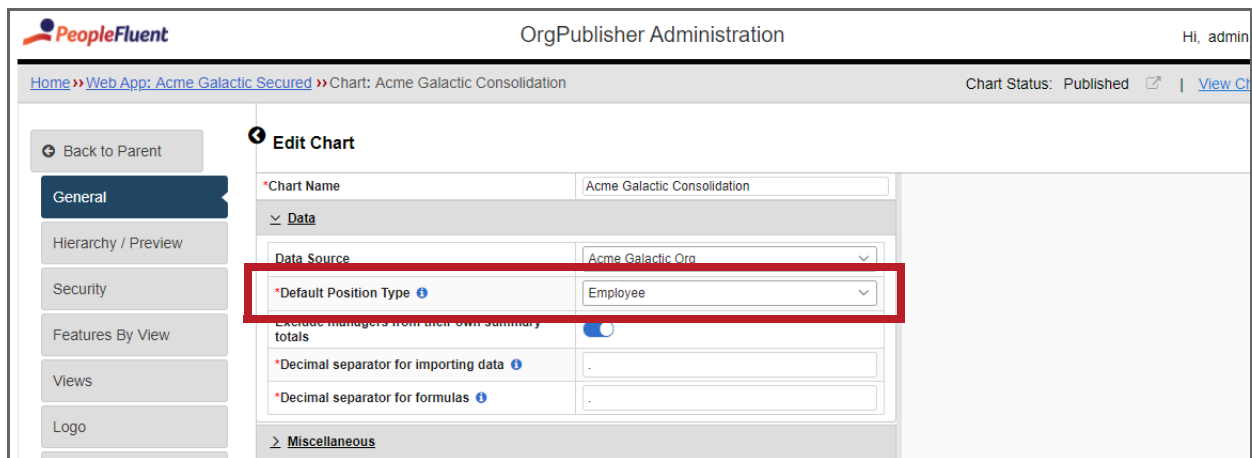


Figure 2: Default Position Type Field on the General Tab

Branding and Logo Improvements

Functionality

This enhancement consolidates branding and logo features onto a single page. From this page users with the appropriate permissions can resize images for the chart logo and upload an image for the header logo.

Details

Branding and logo features are now available on the Chart Logos page in the Admin web app. The page has two sections: Chart Logo and Header Logo.

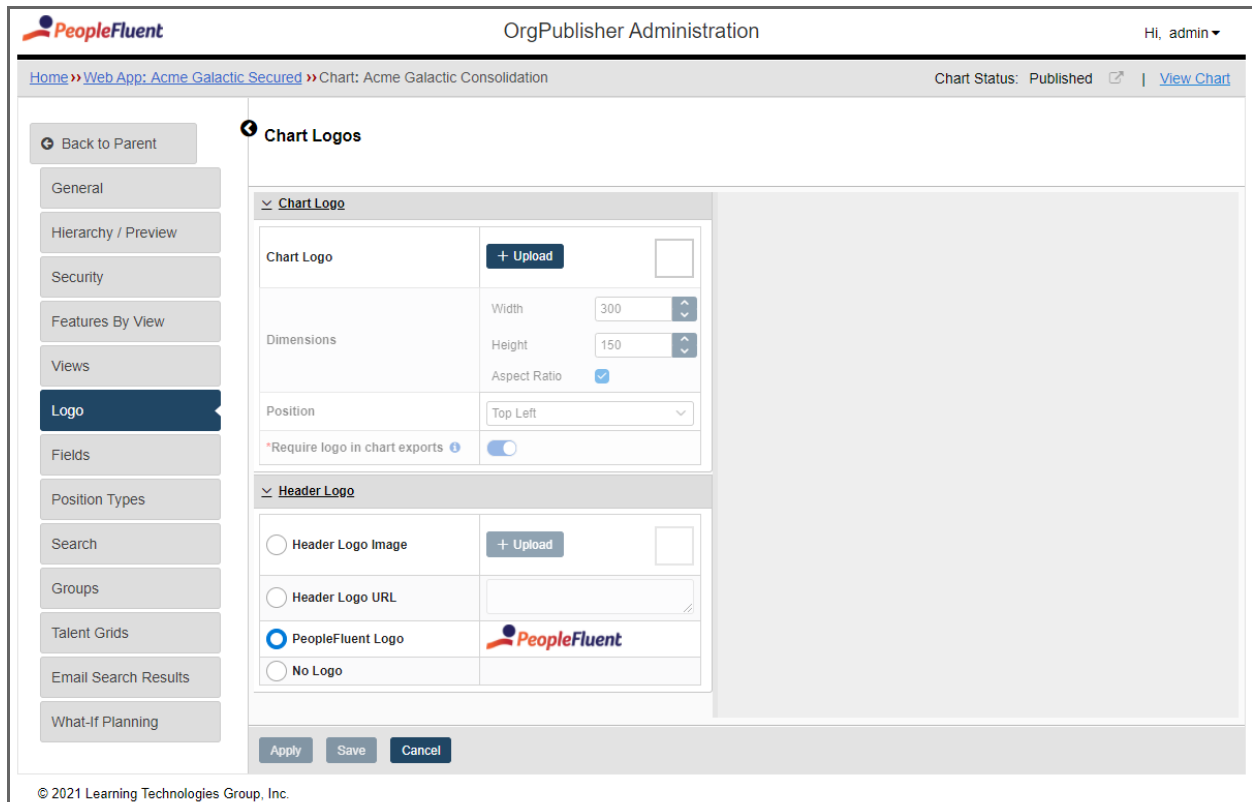


Figure 3: Chart Logos Page

Chart Logo

In the Chart Logo section, users with the appropriate permissions can upload an image, which displays in the Chart Logo Image Preview panel. Users can resize the logo by clicking and dragging the red square in the bottom right corner, or enter values in the dimension fields, as well as choose to maintain the image's aspect ratio. If Aspect Ratio is not selected, the minimum size is 60 x 60 and the maximum is 2000 x 2000.

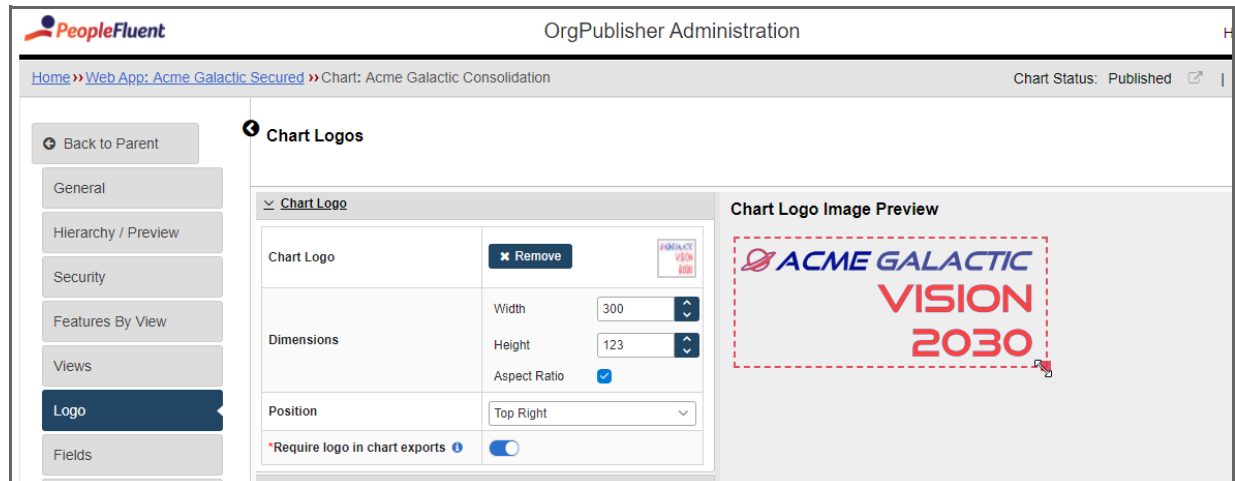


Figure 4: Chart Logo Section

Header Logo

In the Header Logo section, users with the appropriate permissions can now upload a JPG or PNG image. The image is automatically scaled to a height of 40 pixels and the width will change automatically to maintain the aspect ratio.

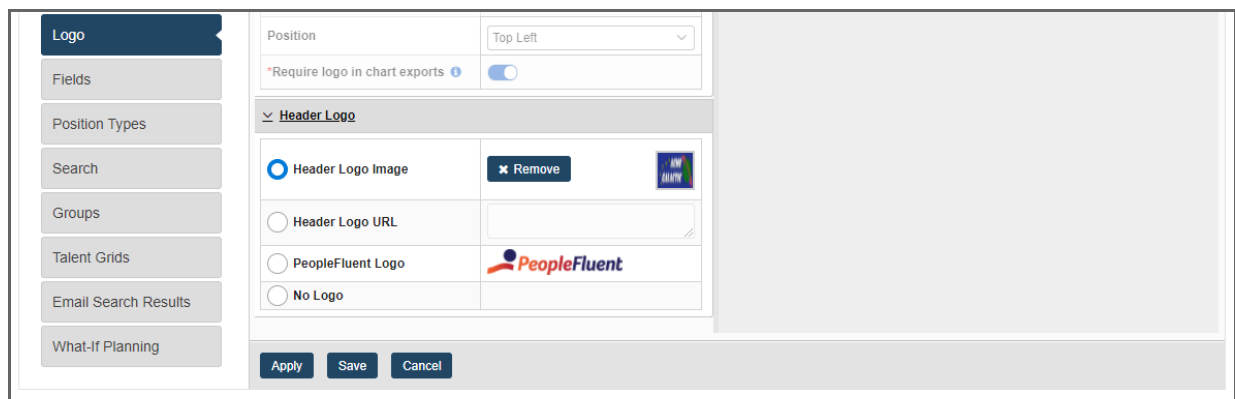


Figure 5: Header Logo Section

In addition to the existing options to use a logo from a URL or use the PeopleFluent logo, users also now have the option to not display a header logo by selecting **No Logo**.

Import and Export Group Definitions

Functionality

This enhancement allows users with the appropriate permissions to export group definitions and then import them into other charts.

Details

Users with the appropriate permissions can now export existing group definitions as a means of backup, or to import into another chart.

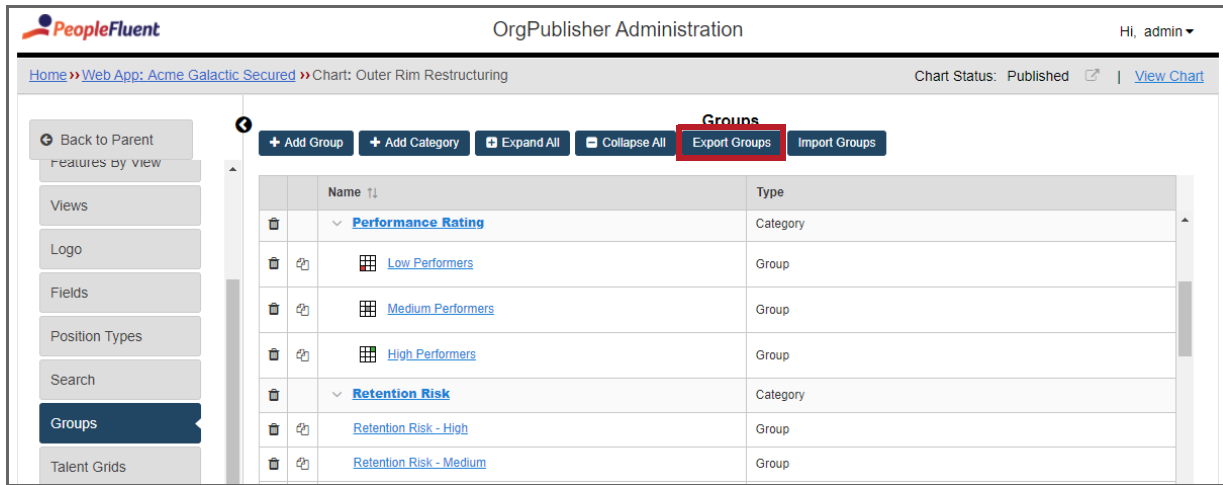


Figure 6: Buttons to Export Groups

Exporting a group definition includes the group's name, icon, category, and criteria. Users can select individual groups or all groups in a category.

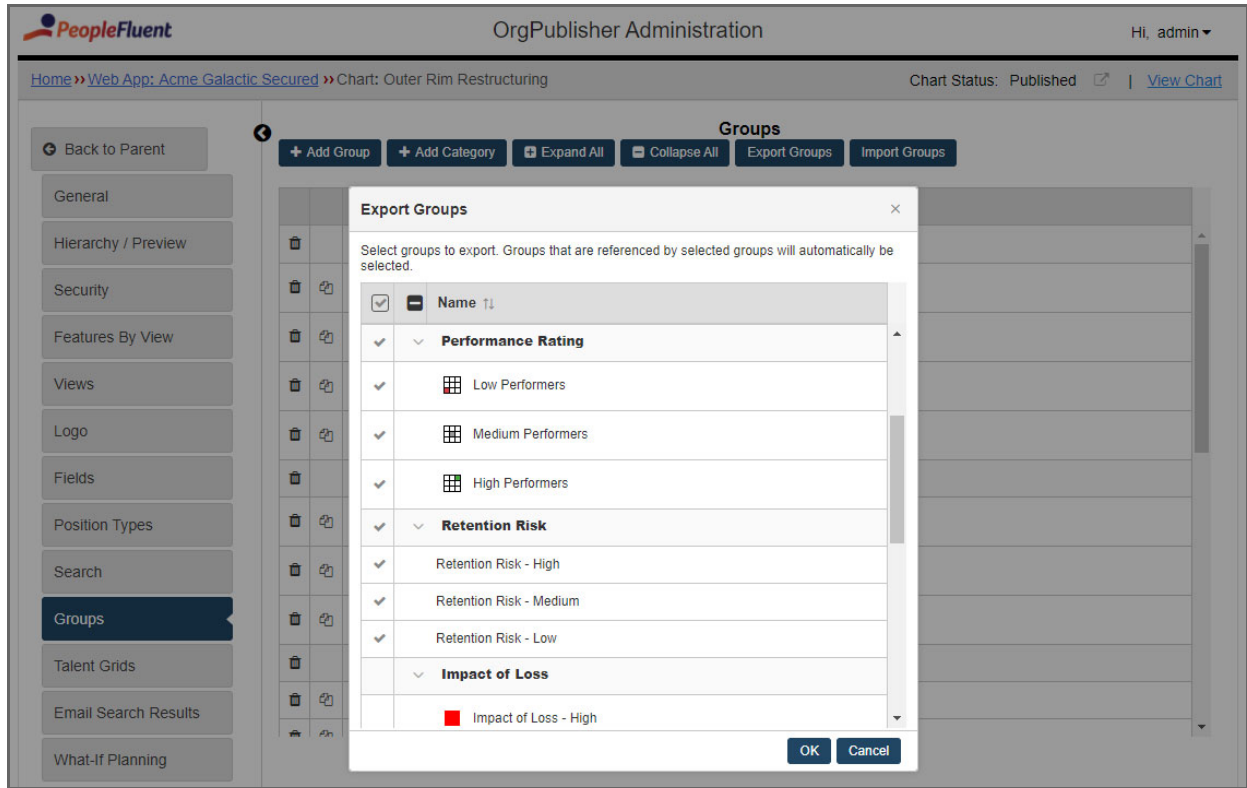


Figure 7: Export Group Definitions

Exporting groups does not include the data records that meet the group's criteria.

Imported Group Definitions

Users with the appropriate permissions can import group definitions that have been exported from another chart.

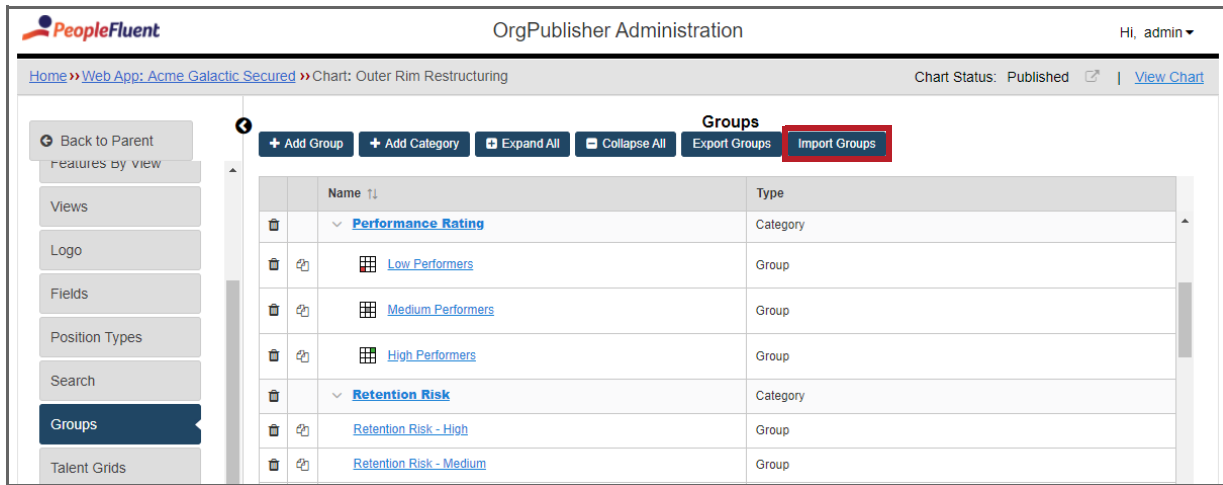


Figure 8: Button to Import Groups

If an imported group's criteria includes other groups, then all of the information for those related groups are also imported. Custom icons used in imported group definitions are also imported if they do not exist in the target Charting web app.

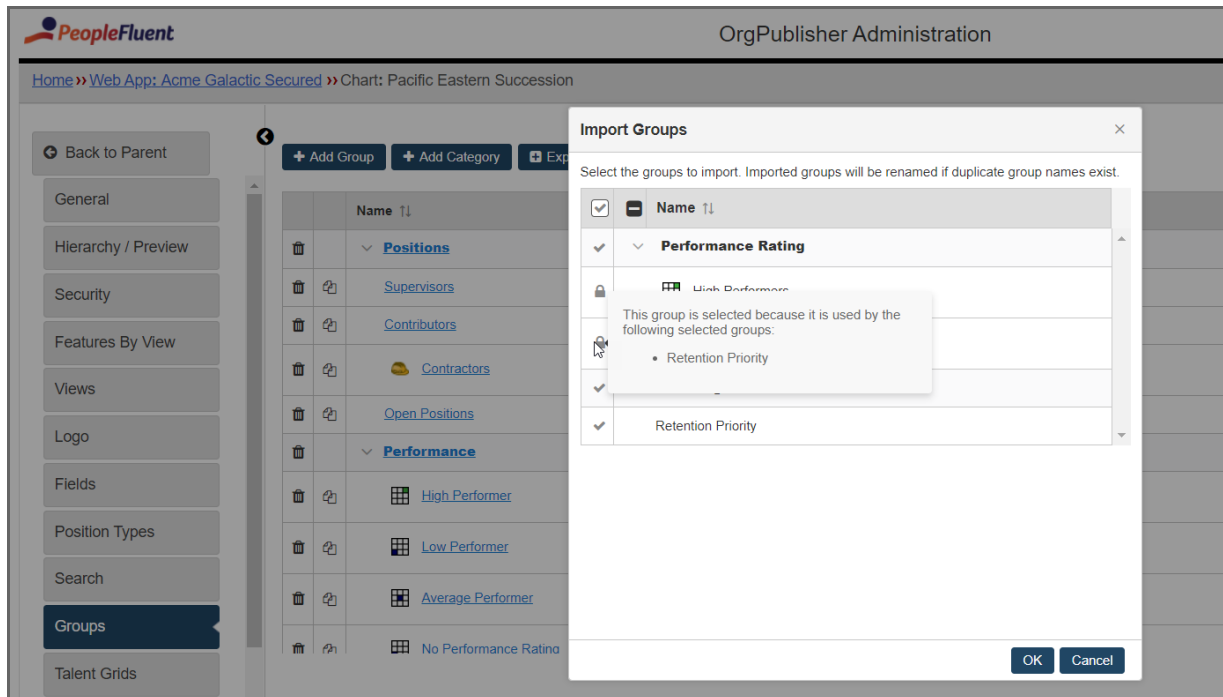


Figure 9: Import Groups

If an imported group definition has the same name as an existing group, then the imported group's name is renamed. If an imported group's criteria includes an imported group that was renamed, then the criteria is automatically updated to reflect the group's name change.

An exported group definition includes the group category, if it is assigned one. When imported, the group is automatically assigned to an existing category if one with the same name exists. Otherwise the new category is also added to the chart.

Required Fields

The target chart must be configured with all fields used by the imported group's criteria. An error message appears if a field is not configured in the target chart.

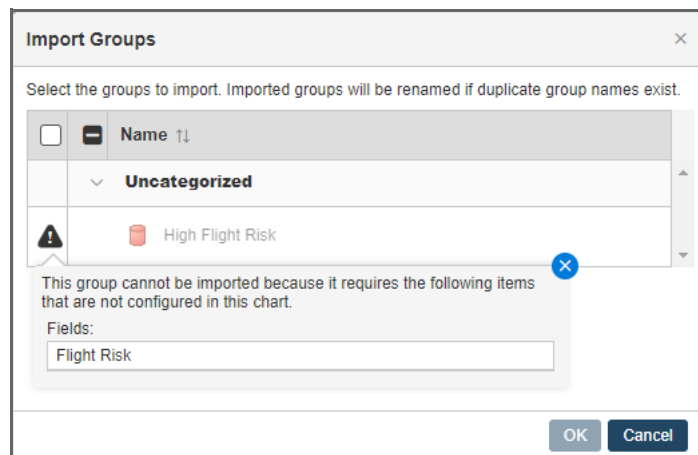


Figure 10: Required Fields

Import and Export Data Source

Functionality

This enhancement allows users with appropriate permissions to import and export data sources from the Admin web app.

Details

Users with appropriate permissions can now export data sources as a means of backing up a chart's data source.

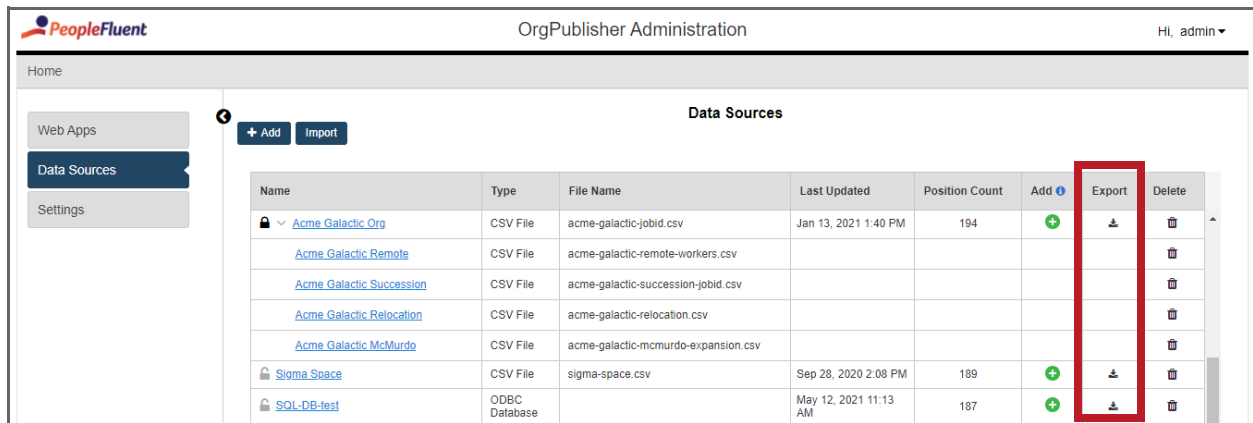


Figure 11: Export Data Source

Exporting a data source includes its secondary data sources. Optionally, users can include the CSV files in the exported data source.

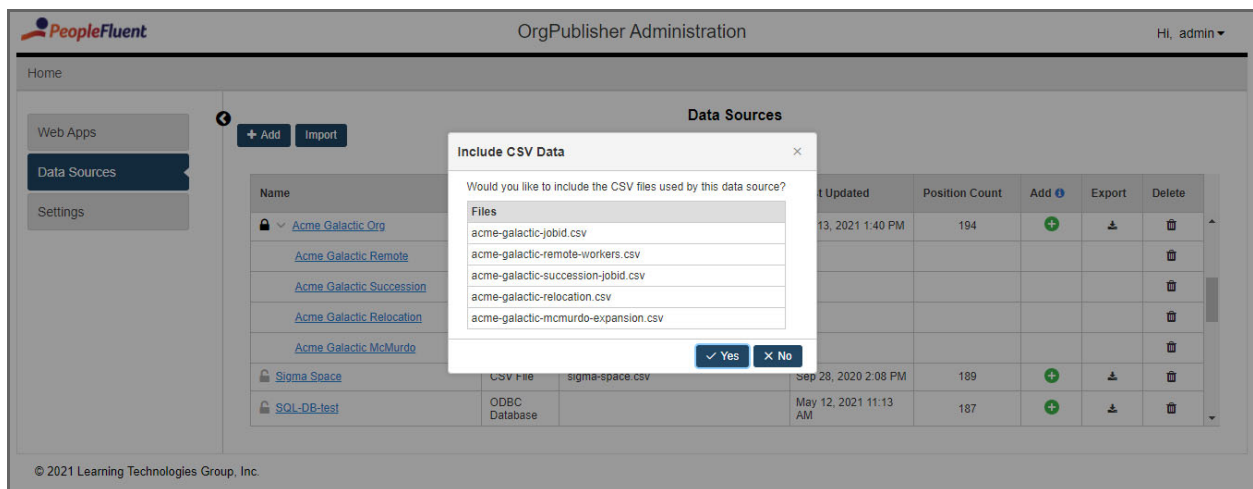


Figure 12: Include CSV Data

Exporting data sources does not back up databases or the database user's password.

Importing Data Sources

Users with the appropriate permissions can import a data source exported from PeopleFluent OrgPublisher. The file being imported must have the .opDatasource format.

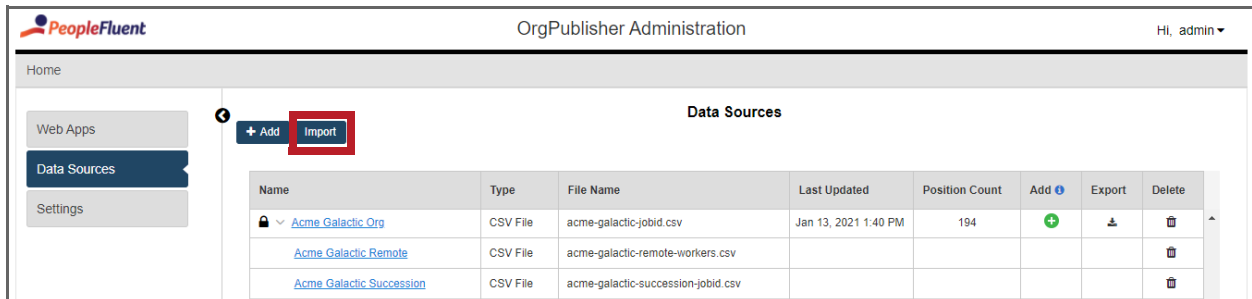


Figure 13: Import Data Source

If the imported data source includes CSV files and any of the files have the same name as an existing file, then the Renamed CSV Files window appears.

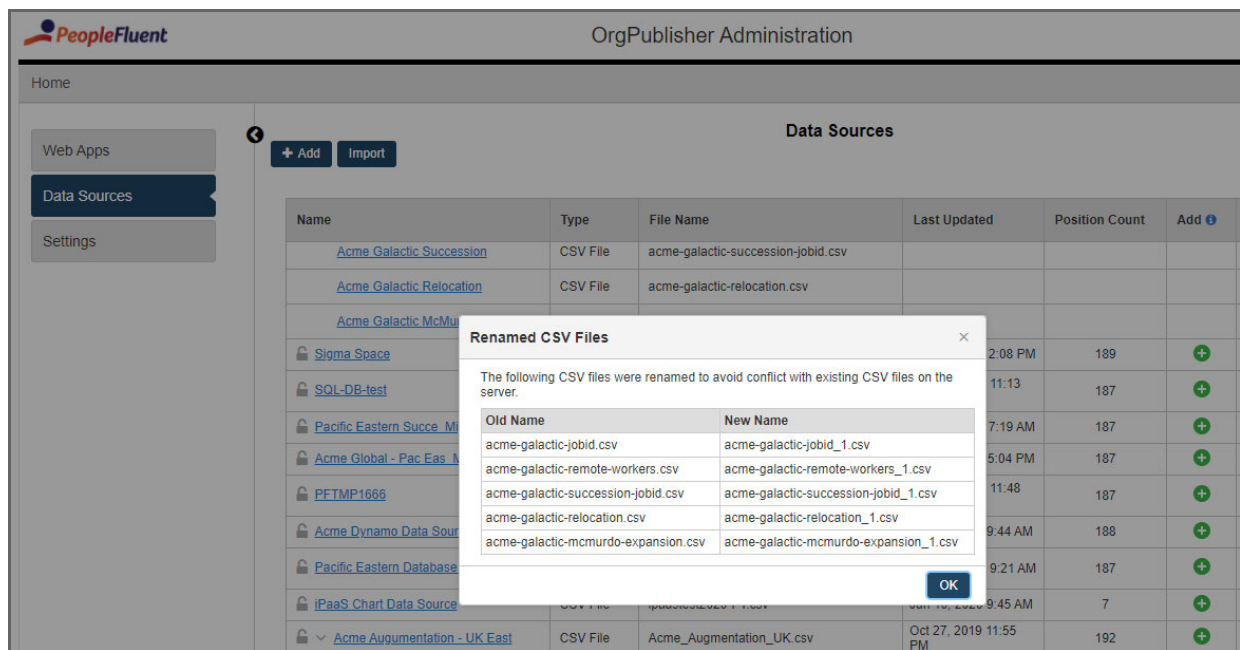


Figure 14: Renamed CSV Files

If the imported data source uses CSV files that were not included in the export, the Import Complete window appears. Make note of any files whose status is missing as they will need to be located in the OrgPublisher Data directory on the server where the OrgPublisher Configuration Utility is installed.

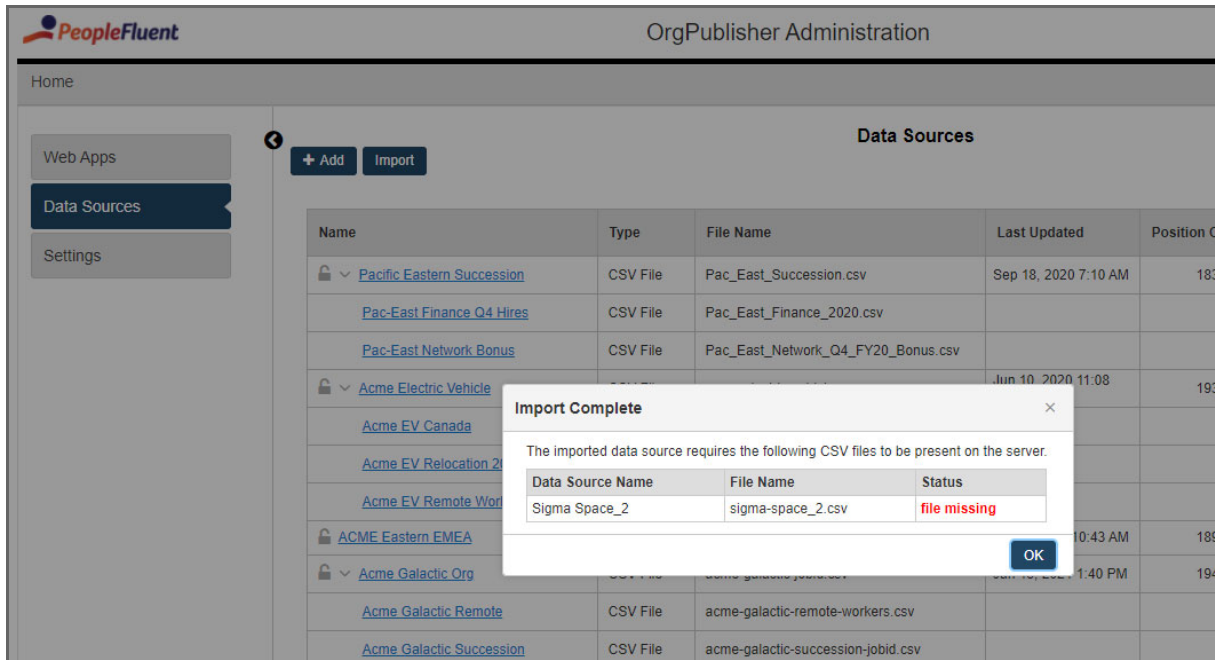


Figure 15: Import Complete Dialog: Missing CSV Files

Once a data source is successfully imported, the user will need to complete its configuration.

View Charting and Admin Web App Logs

Functionality

This enhancement allows users with the appropriate permissions to view the Charting and Admin web app logs, and then filter and copy events.

Details

Users with the appropriate permissions can now access the Charting and Admin web app logs from the Web Apps page in the Admin web app.

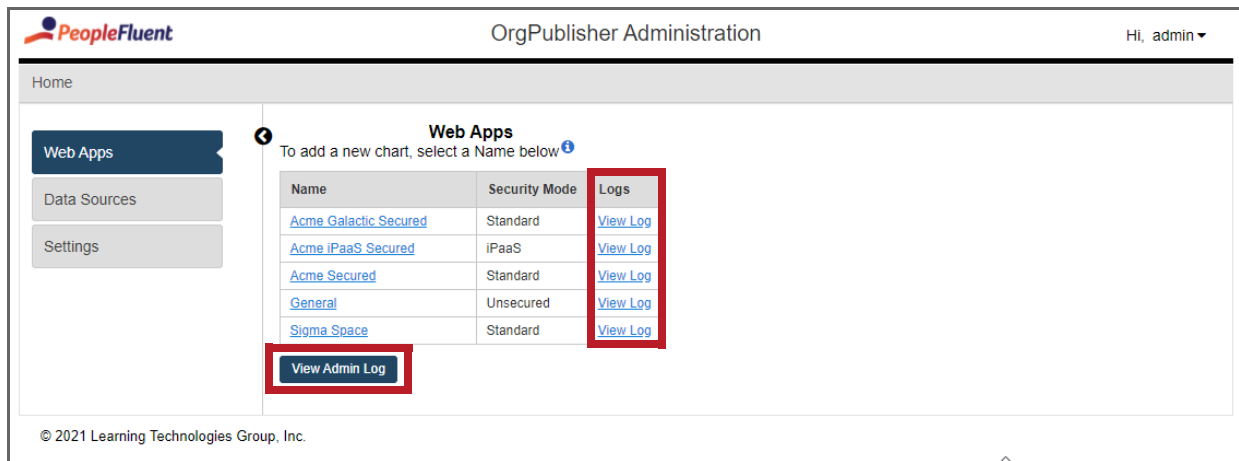


Figure 16: Web Apps Page

The most recent log file displays by default on the Log Viewer page.

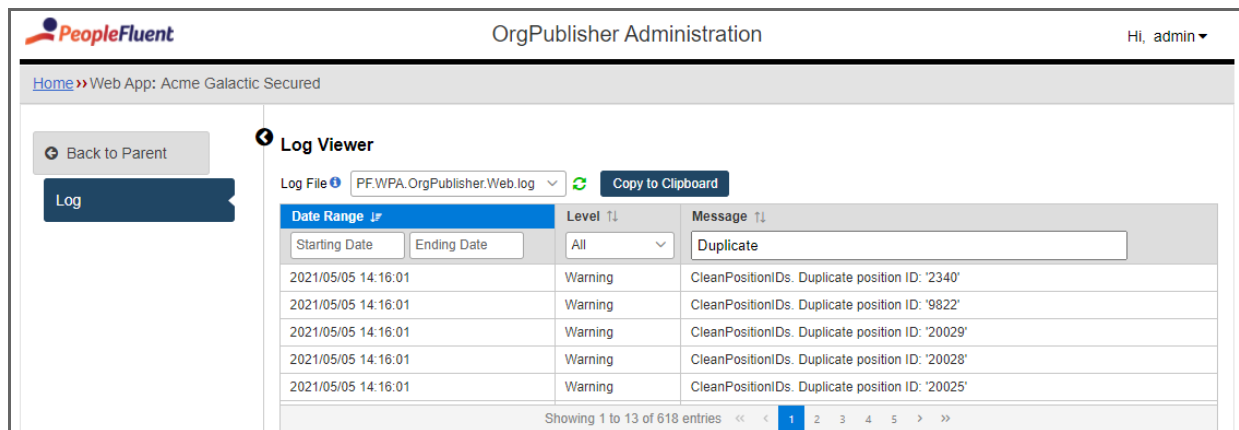


Figure 17: Log Viewer Page

Users can access older log files from the Log File drop-down menu, if they are available. Users can apply filters to the fields in the column headers to reduce the number of entries before copying entries to share for analysis.

Issues List

The following table includes the client-reported and internally-found issues addressed in this update and are reported to clients. Client names only appear in the *Internal Release Notes*.

As always, clients can track the status of their service requests on PeopleFluent Customer Community:

<https://customers.peoplefluent.com>.

Table 2: Resolved Issues

Issue ID	Internal ID	Description	Resolution
166732	PFTMP-5	Inconsistent line formatting in imported charts.	This issue has been resolved. Line formatting properties in imported legacy OrgPublisher charts are retained and used when applicable.
292109	PFTMP-2001	Secondary data source with additional records does not validate against the primary data source.	This issue has been resolved. Secondary data sources and their errors are now included in the validation results for a data source.
294252	PFTMP-2009	Boxes overlap when box formats are copied between views into boxes with different widths.	This issue has been resolved. Copying box formats between boxes of different widths is not permitted. An error message now displays if this operation is attempted.
295281	PFTMP-2036	Admin web app freezes when working with migrated charts in two different languages.	The issue was caused by standard fields being renamed before publishing and migrating the charts. This issue has been resolved by renaming the fields in the legacy app and then repeating the migration.
295766	PFTMP-2048	Cannot use lowercase characters when setting Record Type for Position definitions.	This issue has been resolved. Uppercase and lowercase characters are now allowed when setting Record Type for Position definitions.
296810	PFTMP-2133	When exporting a chart from the Admin web app using Mozilla Firefox, the .opchart file is being saved as a ZIP file with a set of files and one folder.	This issue has been resolved. The exported chart now saves as an .opchart format.
298099	PFTMP-2246	Chart's View Title As of Date is not updated.	This issue has been resolved.

Table 2: Resolved Issues (Continued)

Issue ID	Internal ID	Description	Resolution
299263	PFTMP-2236	Chart's Custom Title does not update when switching from custom view to compact view then back again.	This issue has been resolved.
299329, 304728	PFTMP-2278	Profile View displays field name instead of label.	This issue has been resolved.
3002297	PFTMP-2431	User has to click multiple times on the Excel icon before the Export to Excel popup appears.	This issue has been resolved.
3022177	PFTMP-2467	Chart expands beyond viewable space and requires scrolling.	This issue has been resolved.
302504, 302508, 3030007	PFTMP-2532	Compact and Mobile view appear in the View drop-down menu.	This issue has been resolved. Default mobile and compact views are not present when there are custom mobile and compact views in use.
3032877	PFTMP-2533	When opening a group, the comparison type does not appear until you click on it.	This issue has been resolved. The Comparison Type selection now displays when the user opens the Edit Group page.
3043457	PFTMP-2599	Cannot drill down and up in HTML5 chart because the single quote (') character is used in Parent Box ID and Box ID fields.	This issue has been resolved. Parent Box ID and Box ID fields can now use the single quote (') and double quote (") characters.
3049327	PFTMP-2360	Admins and chart users receive vague error message about process unable to access file because it is being used by another process.	This issue has been resolved. The issue was caused by the chart's data source CSV file being open by another application when OrgPublisher was trying to read it. Admin and Charting web app users are now informed when a data source is being edited by another application.
66747	PFTMP-20	Chart viewer not applying field search settings for limiting suggested values.	This issue has been resolved.
Internal	PFTMP-2605	User receives error when adding a group to an existing category.	This issue has been resolved. Groups can now be successfully added to an existing category without an error.

Table 2: Resolved Issues (Continued)

Issue ID	Internal ID	Description	Resolution
Internal	PFTMP-2584	"The data has been changed by another user" error message given when adding a box in a reporting relationship chart.	This issue has been resolved. A box sequence is now set when a new box is added.
Internal	PFTMP-2544	Custom suggested values don't show in field search properties until user navigates away and back	This issue has been resolved. The custom suggested value list now updates when items are added.
Internal	PFTMP-2537	Reverse Proxy store as cookie setting is not honored.	This issue has been resolved.
Internal	PFTMP-2525	Roles and users disappear from the Admin web app if creating them before creating a Charting web app.	This issue has been resolved.
Internal	PFTMP-2499	The internal transfer action fails to show results when a person's name is searched for.	This issue has been resolved.
Internal	PFTMP-2471	Talent Management data sources cannot be fully configured on initial creation, preventing users from mapping fields.	This issue has been resolved.
Internal	PFTMP-2470	Data Sources page in the Admin web app displays errors when viewed using Microsoft Internet Explorer 11.	This issue has been resolved and the page now renders correctly in Internet Explorer 11 without any errors.
Internal	PFTMP-2450	Expandable fields placed closely together in a vertical column do not display correctly when the fields are not wide enough to display their contents.	This issue has been resolved.
Internal	PFTMP-2425	Having the string 'app' in the server or application name causes a never ending redirect loop.	This issue has been resolved. The string "app" is now allowed in the name of an OrgPublisher web app.
Internal	PFTMP-2413	Adding a graph to a view does not check for a unique name.	This issue has been resolved. Users are now notified if graphs have the same name.

Table 2: Resolved Issues (Continued)

Issue ID	Internal ID	Description	Resolution
Internal	PFTMP-2368	Chart preview is not working properly when sorting is set to manual.	The chart did not have a box sequence field which prevented the manual sort from applying. This issue has been resolved. A lack of the box sequence field no longer prevents manual sorting and the chart preview will render as expected.
Internal	PFTMP-2312	Assistant child box is not positioned correctly in PDF and PowerPoint exports.	This issue has been resolved.
Internal	PFTMP-2284	Hierarchy/preview is blank when the selected top box is not found for the default view.	This issue has been resolved.
Internal	PFTMP-2211	User can open a box's Profile when the view's profile options are turned off.	This issue has been resolved.
Internal	PFTMP-2167	When a user tries to create a new app pool in the OrgPublisher Configuration Utility they are asked to follow the password validation rules.	This issue has been resolved.
Internal	PFTMP-2093	Title As Of date is not functioning properly on imported charts.	This issue has been resolved.
Internal	PFTMP-1796	Boxes are cut off in PDF exports.	This issue has been resolved.
Internal	PFTMP-1657	Non-default views display the title for the default view.	This issue has been resolved. Non-default views now display their own titles.
Internal	PFTMP-1656	Custom text does not appear within the chart legend.	This issue has been resolved.
Internal	PFTMP-1465	Compact view not showing boxes for custom position types.	Migrated positions using whose customer position type used <> were not displaying properly when viewed in compact mode. This issue has been resolved.
Internal	PFTMP-1418	Moving the Name column in the Search window causes formatting to be lost in a search.	This issue has been resolved. Formatting is now retained by giving focus to the filter of the first search column when selecting a Saved Search.

Table 2: Resolved Issues (Continued)

Issue ID	Internal ID	Description	Resolution
Internal	PFTMP-1409	Rapidly clicking the Everyone option in Search can cause a chart to lock up.	This issue has been resolved. Users are now prevented from further action while waiting for the search to complete.
Internal	PFTMP-1344	PowerPoint Export pushes text in expandable fields below the box when a word is longer than the width of the field instead of being truncated.	This issue has been resolved. Expandable fields now grow correctly and affect surrounding fields as expected.
Internal	PFTMP-1014	When entering the name for a graph, if there are fewer than three characters a warning message is displayed stating that at least one character is required.	This issue has been resolved. Graph names now only require one character.
Internal	PFTMP-970	Third shadow style on Legend does not render in preview or in the chart.	This issue has been resolved.
Internal	PFTMP-878	Exporting XLS/PDF/PPT/Email when filtering on a position type whose value includes <> causes a error.	This issue has been resolved.
Internal	PFTMP-572	The Not Equal comparison on the Group page does not accurately compare integers and decimal values in numeric fields.	The Not Equal comparison was converting numeric fields to strings, resulting in invalid results. This issue has been resolved. The comparison operator now honors the numeric field type (number, integer, currency, or summary) and performs the operation correctly.

Appendix

Supported Languages

PeopleFluent OrgPublisher offers standard support for the following languages. Supported languages are defined as languages that may be implemented as an out of the box locale.

- Brazilian Portuguese
- Dutch
- French
- German
- Italian
- Spanish (Spain)
- US English

Web Browser Support Policy

To provide the best security and performance for our users, PeopleFluent recommends that clients use one of the following browsers to access PeopleFluent applications.

Unsupported older version of browsers may have rendering or compatibility issues. When such issues are reported, PeopleFluent will attempt to recreate on fully supported browser versions and in the event they cannot be replicated, the remedy will likely be a recommendation for clients to upgrade to a supported browser.

Microsoft Edge (latest stable release)

PeopleFluent supports the latest stable release of Microsoft Edge browsers in accordance with Microsoft's support policy.

Microsoft Internet Explorer (11)

PeopleFluent supports Microsoft Internet Explorer browsers in accordance with Microsoft's support policy:

<https://support.microsoft.com/en-us/gp/microsoft-internet-explorer>.

Mozilla Firefox (latest stable release)

PeopleFluent supports Firefox's latest stable release channel. PeopleFluent's support also extends to Firefox's specialized Extended Support Release (ESR). For Mozilla Firefox release notes, go to:

<https://www.mozilla.org/en-US/firefox/releases/>

Google Chrome (latest stable release)

PeopleFluent supports Chrome's latest stable release from Google's Chrome stable channel. For Chrome release updates, go to:

<https://www.chromium.org/developers/calendar>

Apple Safari (latest stable release)

PeopleFluent supports Apple's latest version of Safari browsers on macOS X and iOS.

Known Issues and Limitations

PeopleFluent *requires* the latest patches be installed for all supported web browser versions.

The following are known issues or limitations of web browsers that may affect the PeopleFluent OrgPublisher Administration and Charting web apps:

- The PeopleFluent OrgPublisher Charting web app does not support printing from the web browser. Instead, PeopleFluent recommends using the Charting web app's PDF or PowerPoint export features, then printing from those applications.
- The PeopleFluent OrgPublisher Administration and Charting web apps do not support using Compatibility or Enterprise mode with any version of Microsoft Internet Explorer.

Internet Access

The PeopleFluent OrgPublisher Administration and Charting web apps require access to www.gstatic.com to render graphs.

Additional Documentation Resources

Additional document resources are available from your PeopleFluent representative and from PeopleFluent Customer Community (<https://customers.peoplefluent.com>).

Table 3: Documentation Resources

Documentation	Description
Hardware and Software System Requirements	Provides information on workstation requirements, recommended and supported browsers, and supporting third-party applications.
Configuration & Installation Guide	Provides instructions for the installation and configuration of the PeopleFluent OrgPublisher Configuration Utility.
Online Help	Provides help content for users of the PeopleFluent OrgPublisher Administration and Charting web apps.
Release Notes	Provides a detailed summary of new features and enhancements to existing features, including screenshots, impact on the user interface, security, and charts. This document includes a list of resolved issues, supported browsers and operating systems, supported languages, and product documentation.

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