



PeopleFluent OrgPublisher 21.11 Release Notes

Document Version: 1.0

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New to PeopleFluent OrgPublisher

PeopleFluent is pleased to announce the upcoming PeopleFluent OrgPublisher 21.11 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:	December 17, 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.

Archiving Charts and Data Sources

Functionality

This enhancement allows users with appropriate permissions to save a snapshot of a chart, its associated data sources, or both for future reference.

Details

Users with appropriate permissions can now enable archiving in PeopleFluent OrgPublisher to save snapshots of a chart's configuration, its data source, or both. Users can also set the number of archives to retain and the number of days to keep them.

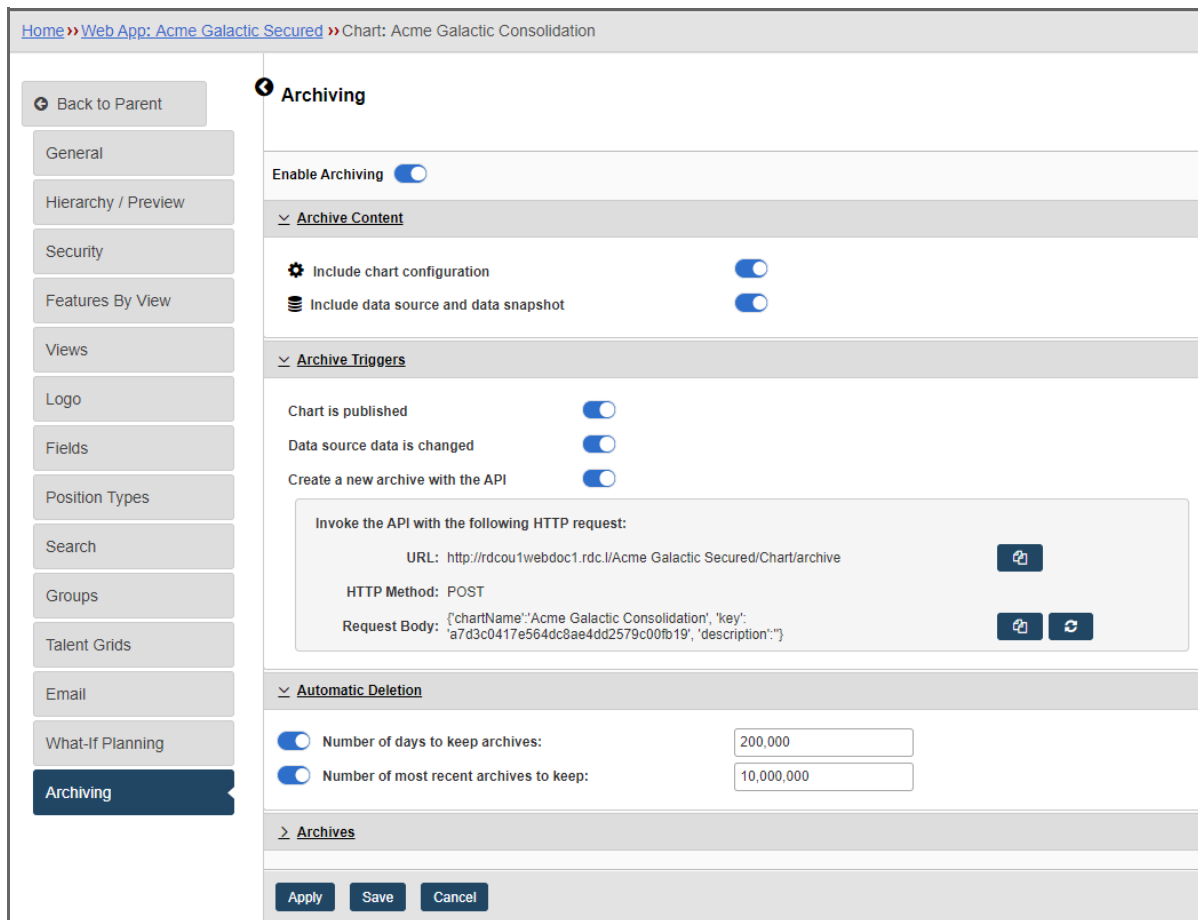


Figure 1: Archiving Page

Triggers

Users can create an archive immediately or configure one to be created whenever a chart is published, a data source's data is changed, or via API calls using an API tool, such as Postman, or with a Windows Batch or PowerShell script. Sample scripts are available in the Admin web app online help.

Working with Archives

Once an archive is created, you can delete it or use the Archive Actions menu to retrieve a read-only version.

Archives							
Description		Date	Data Source	Content	Record Count	Size in MB	Actions
	Line format changes	12/10/21, 4:23 PM	Acme Galactic Org		194	0.05	
	Changed Archive API key; added data sources	12/10/21, 4:24 PM	Acme Galactic Org		194	0.08	
	Chart data changed	12/10/21, 4:24 PM	Acme Galactic Org		194	0.08	
	Restored line format for Open Positions on the Position ...	12/13/21, 1:19 PM	Acme Galactic Org		194	0.08	
	Changed the background color	12/13/21, 1:37 PM	Acme Galactic Org		194	0.08	
	Changed security to use the User ID field for login ID.	12/13/21, 1:38 PM	Acme Galactic Org		194	0.08	
	Reset top of box for Position Data View.	12/13/21, 3:58 PM	Acme Galactic Org		194	0.08	
	Changed default group for Position Data from Employee...	12/13/21, 4:22 PM	Acme Galactic Org		194	0.08	
	Added fields to the Card View for the Position Data view.	12/13/21, 4:22 PM	Acme Galactic Org		194	0.08	
	Updated chart logo	12/13/21, 4:24 PM	Acme Galactic Org		194	0.08	
						1.23	

Figure 2: List of Archives

Archive Actions ✕

Retrieve Chart ?

Chart and Data Source

Chart

Data Source

Compare to current chart data

✕ Close

Figure 3: Archive Actions

Retrieved archived charts appear on the Charts page. The chart's name is appended with the date and time stamp, followed by the Archive icon indicating that it is read-only. If the data source and data snapshot were included in the archive, the retrieved chart uses the retrieved data source, otherwise the chart uses its named data source.

Name	Data Source	Record Count	Last Updated	Status
Acme Galactic Consolidation	Acme Galactic Org	194	Dec 7, 2021 8:28 PM	Modified
Outer Rim Restructuring	Acme Galactic Org	194	Dec 7, 2021 8:28 PM	Published
Omega Galactic Bridgeworks	Sigma Space	189	Sep 28, 2020 2:08 PM	Published
Acme Galactic Consolidation_archive 2021.12.09.21.34.43	Acme Galactic Org_archive 2021.12.09.21.34.43	198	Dec 7, 2021 8:28 PM	Draft

Figure 4: Retrieved Archived Chart

Retrieved archived data sources appear on the Data Sources page. The data source's name is appended with the date and time stamp, followed by the Archive icon indicating that it is read-only.

Name	Type	File Name
iPaaS Chart Data Source	CSV File	ipaatest2020-PT.csv
Acme Augmentation - UK East	CSV File	Acme_Augmentation_UK.csv
Acme Galactic Org_archive 2021.12.09.21.34.43	CSV File	acme-galactic-jobid.csv
Acme Galactic Remote	CSV File	acme-galactic-remote-workers.csv
Acme Galactic Succession	CSV File	acme-galactic-succession-jobid.csv
Acme Galactic Relocation	CSV File	acme-galactic-relocation.csv
Acme Galactic McMurdo	CSV File	acme-galactic-mcmurdo-expansion.csv

Figure 5: Retrieved Archived Data Source

Comparing to Current Chart Data

Users with appropriate permissions can compare an archive to the current data if the archive content includes the data source and data snapshot. When the user clicks **Compare to Current Data** in the Archive Actions dialog box, a spreadsheet with the comparison downloads to their browser's Downloads location.

Ad Hoc Reporting and PDF Export Enhancements

Functionality

These enhancements add information to headings on report pages and make report content searchable.

Details

The following enhancements were made to the ad hoc reporting feature:

- Ad hoc reports created using the Capture View and Export Reports are now searchable because they are rendered as PDFs rather than PNG format.
- Any captured views that existed prior to this upgrade will still use the PNG format, and will be included in the report.
- When a captured view is renamed in the Export Reports dialog, the page in the PDF report for that view reflects the new name.
- When exporting reports, users can now sort the Name and Date headers in the Captured Views list.

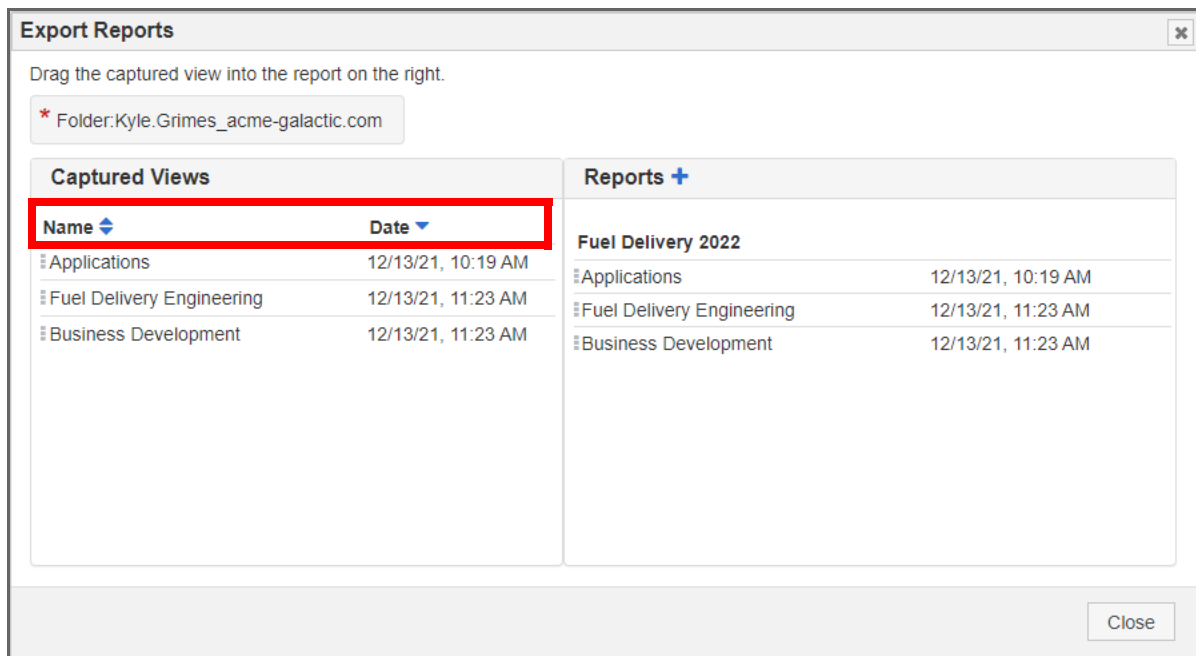


Figure 6: Sortable Columns in Export Reports Dialog

- Exported report page headers now include:

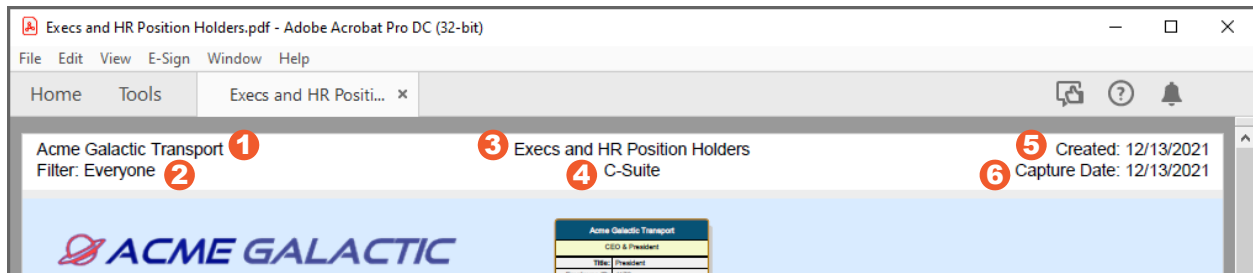


Figure 7: Exported Report Page

Table 2: Exported Report Page Header Items

Item	Description
1	Chart Name
2	Selected Filter
3	Report Name
4	Capture View Name
5	Report Date
6	Capture Date

- Previously captured views will not contain the filter name or chart name.
- After upgrading, the OrgPublisher service will no longer be registered as a Windows service.

Chart Authoring Enhancements

Functionality

This set of enhancements expands the features of chart authoring.

Details

Users with appropriate permissions to create charts now have more authoring controls available:

- [Automatically Add Labels with New Fields](#)
- [Configure Fields in the Card View](#)
- [Search by Group in Preview](#)
- [View Base Fields in the Hierarchy/Preview](#)
- [Configure the Multiple Reporting Pop-up Text](#)
- [Set Default Zoom Level](#)
- [Set the Default Chart Language](#)
- [Set the Direct Report View Set as the Default](#)

Automatically Add Labels with New Fields

Users with appropriate permissions can now automatically add a label when adding a new field to a box format.

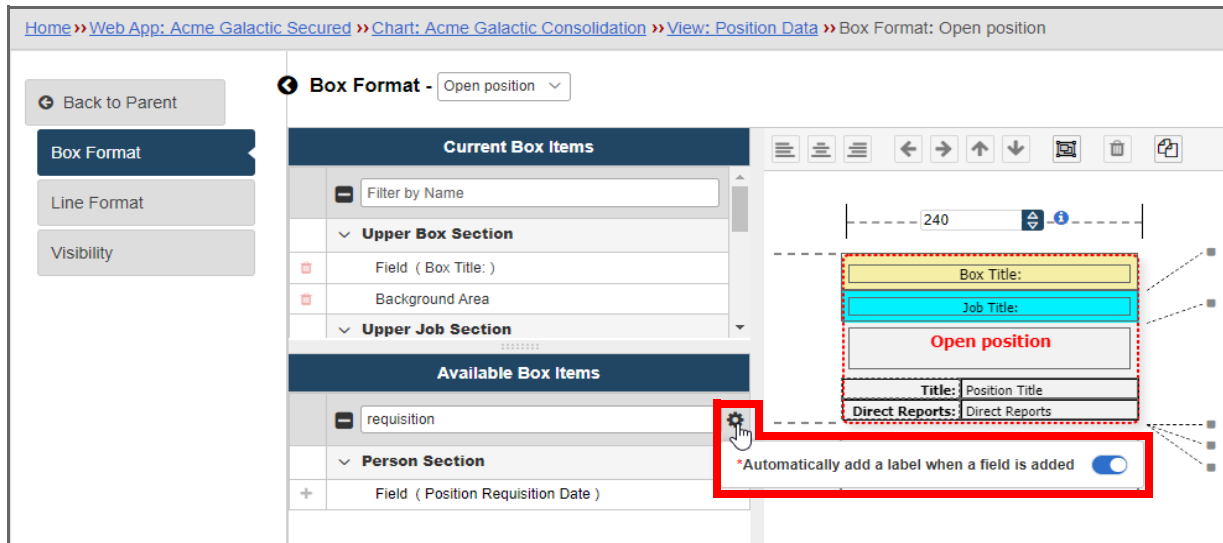


Figure 8: Automatically Add a Label

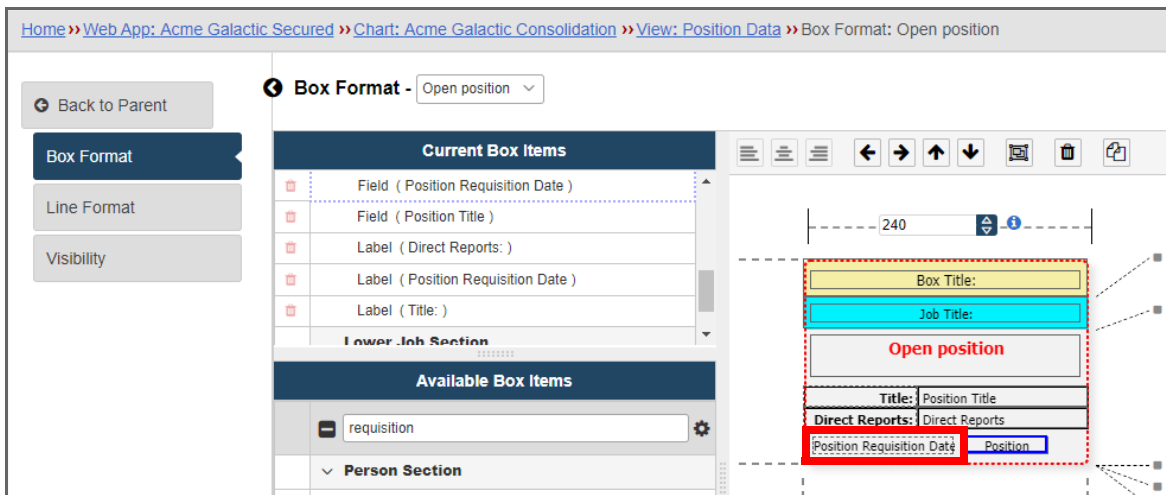


Figure 9: Example of Label Automatically Added with a New Field

Configure Fields in the Card View

By default the card view that appears when a user hovers over a record in search results contains the Employee Name and Job Title fields. Now users with appropriate permissions can add up to three additional fields to the card view.

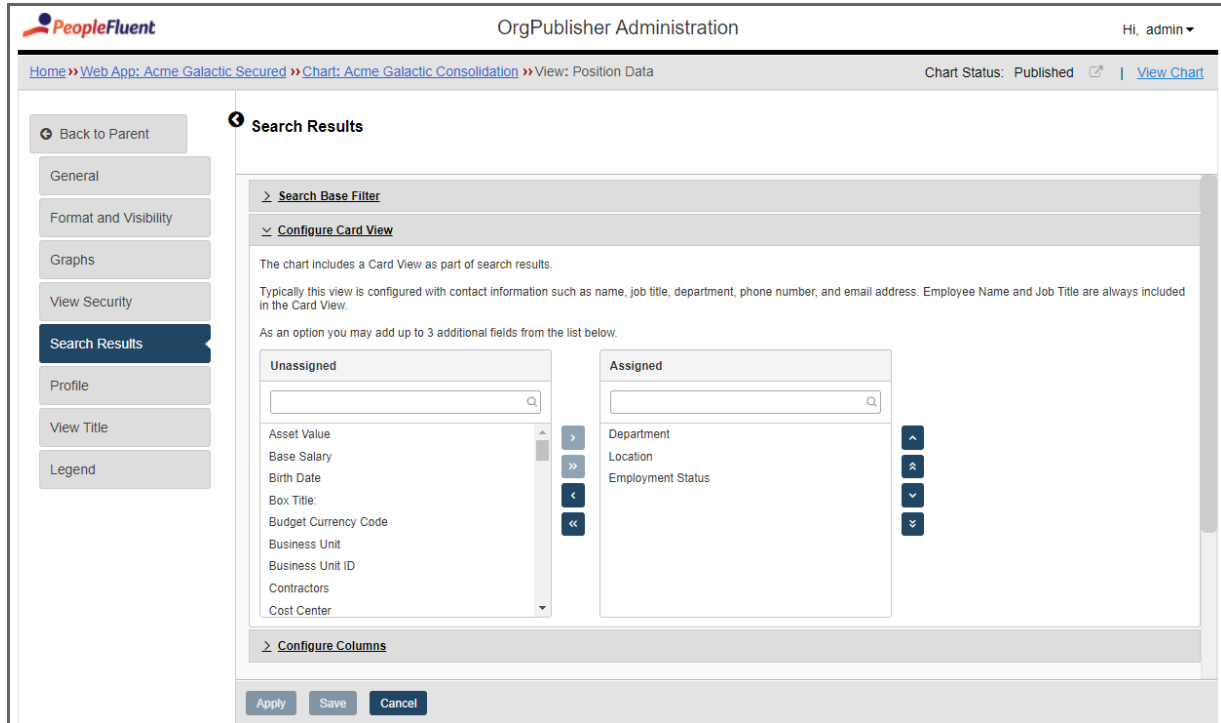


Figure 10: Configure Card View Section in Search Results

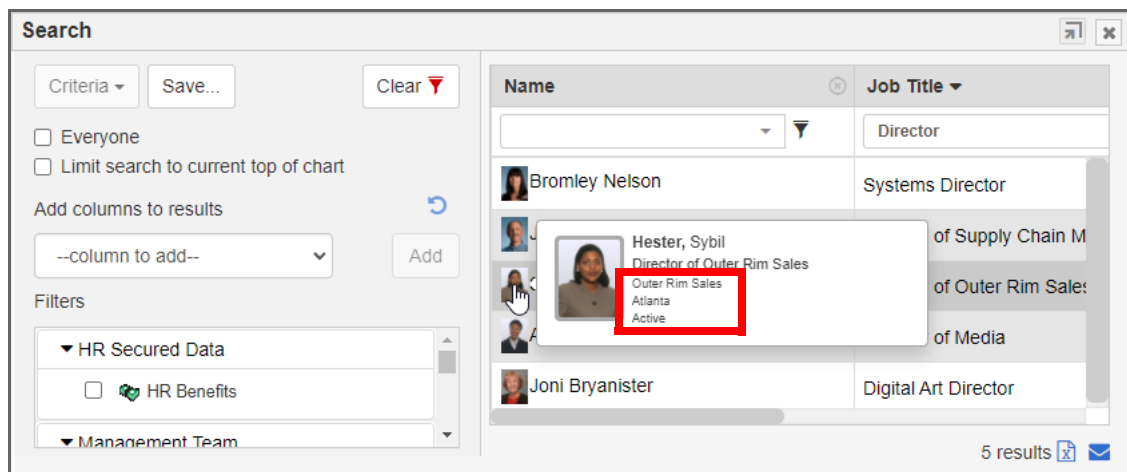


Figure 11: Example of Additional Fields in the Search Results Card View

Search by Group in Preview

Users with appropriate permissions can search by groups in the Hierarchy/Preview.

The screenshot displays the 'Configure the hierarchy and preview the chart' interface. On the left, there are two settings panels: 'Published Hierarchy Settings' and 'View Settings'. The 'Published Hierarchy Settings' panel includes options for 'Chart hierarchy', 'Starting top box for chart', 'Exclude hierarchy above selected box', and 'Number of Levels Published'. The 'View Settings' panel includes 'Synchronize navigation between views' and 'Views' (Job Data, Mobile, Position Data, Position Holders). The main area shows a search interface with a 'Search Field' dropdown set to 'Group', a 'Search' button, and a search input field. A dropdown menu is open, showing a list of groups: 'Current group: Every...', 'Assistants', 'C-Level', 'Directors', 'Employees', 'Everyone', 'HR Benefits', 'HR Demographic Data', 'Managers', and 'Most Multiplier Value...'. The 'HR Benefits' group is highlighted. To the right, there are two employee detail cards: 'Acme Galactic Transport' (CEO & President) and 'Executive Staff' (Executive Assistant). At the bottom, there is a table with columns 'Name:', 'Job Title:', and 'Box Title:'.

Name:	Job Title:	Box Title:
Cheryl Adelsperger	Benefits Specialist	Benefits
Jason Bratton	European Benefits Manager	Benefits

Figure 12: Search by Group in Hierarchy/Preview

View Base Fields in the Hierarchy/Preview

On the Hierarchy/Preview tab of the Admin web app, users with appropriate permissions can now click on the box, job, or person and view all fields for the selected item in the new Base Fields panel.

i Note: This is an administrative tool and is separate from the Profile configured for each view.

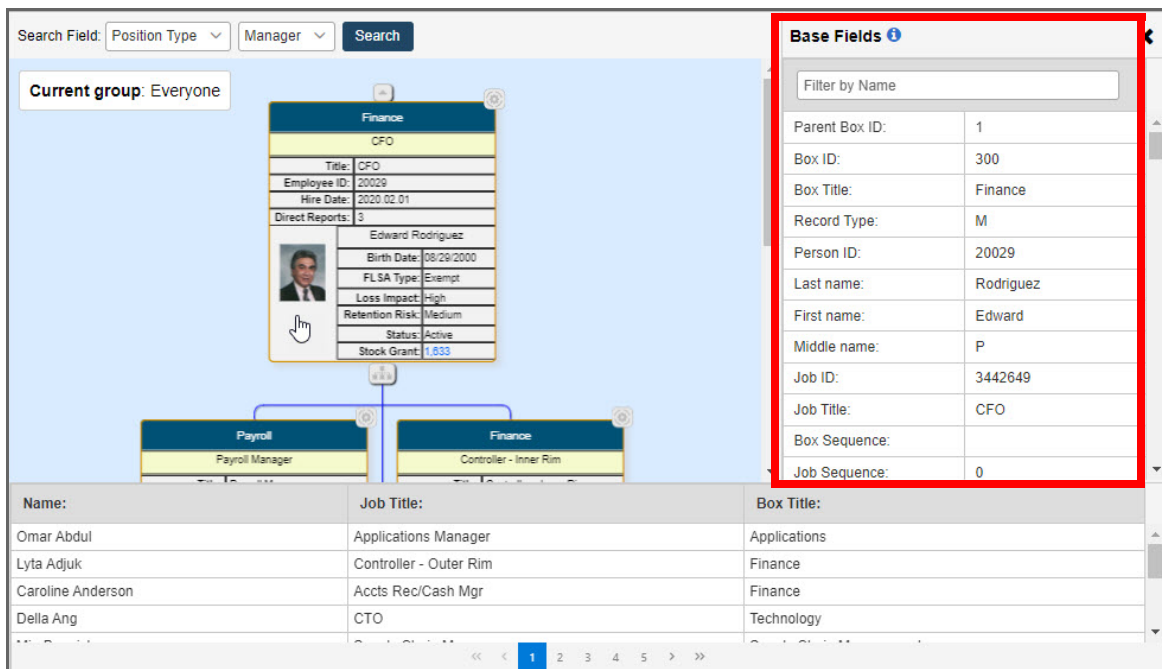


Figure 13: Base Fields in the Preview Section of the Hierarchy/Preview Tab

The following rules apply:

- When a user clicks a person in the Preview section, the Base Fields panel shows the box, job, and person fields.
- When a user clicks a job in the Preview section, the Base Fields panel shows the box, job, and the first position in the job, and person fields, if it is a filled position.
- When a user clicks a box in the Preview section, the Base Fields panel shows the box, the first job, and the first position in the job, and person fields, if it is a filled position.

Configure the Multiple Reporting Pop-up Text

Users with the appropriate permissions can now configure the text that appears in a pop-up when a user clicks a multiple report link on a box. The default text is also reports to.

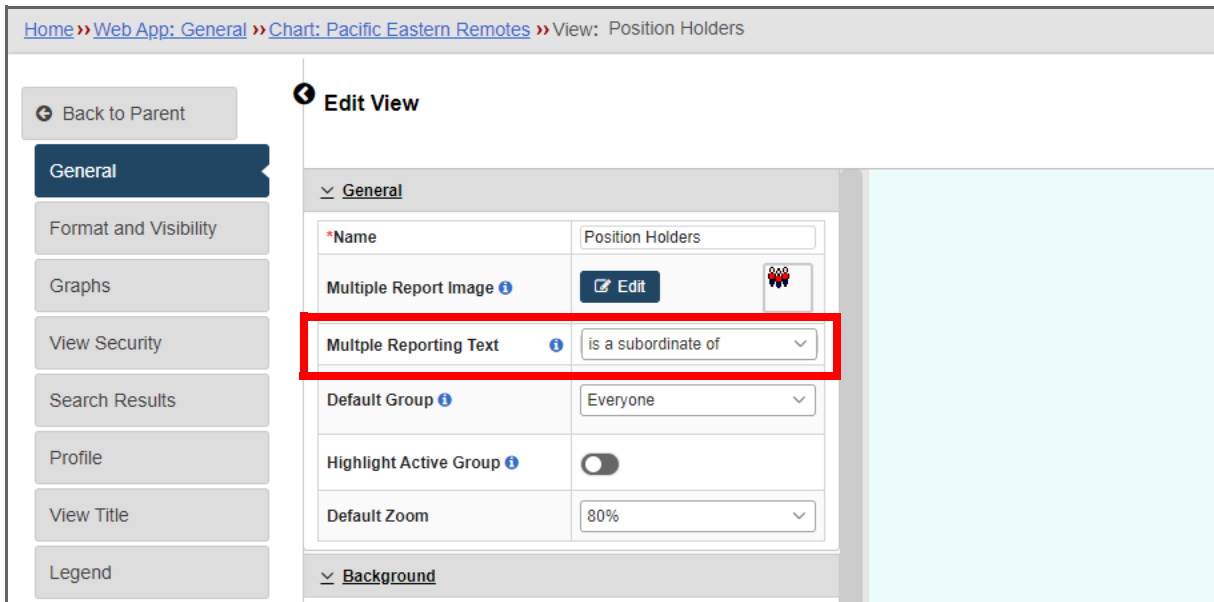


Figure 14: Multiple Reporting Text

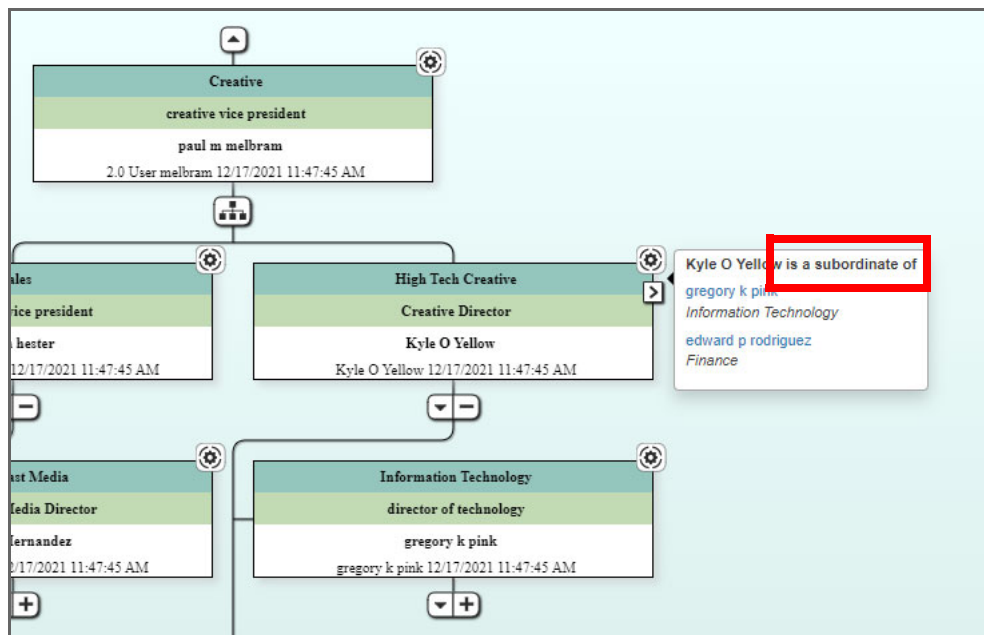


Figure 15: Example of Custom Multiple Reporting Text

Set Default Zoom Level

Users with the appropriate permissions can now set a default zoom level for a view to display when a chart user opens it for the first time. This can be helpful with densely populated charts.

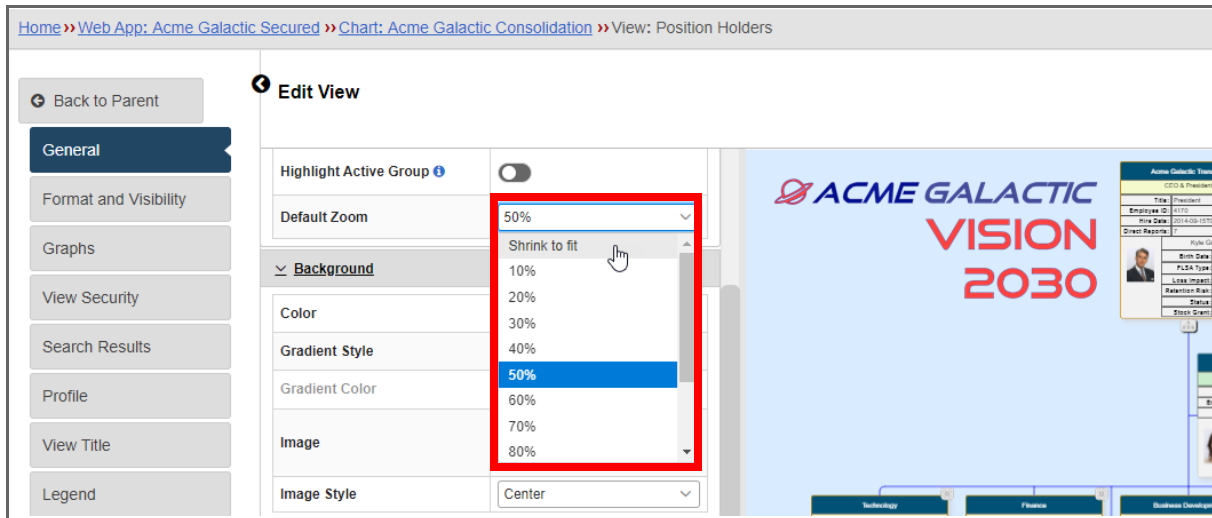


Figure 16: Set Default Zoom for a View

Set the Default Chart Language

Users with appropriate permissions can now set the default language that a chart will open in when a user accesses it the first time. Chart preferences are stored in the user's browser's local storage, so if the user changes their preferred language it will be honored the next time they access the chart so long as they do not clear their browser cache.

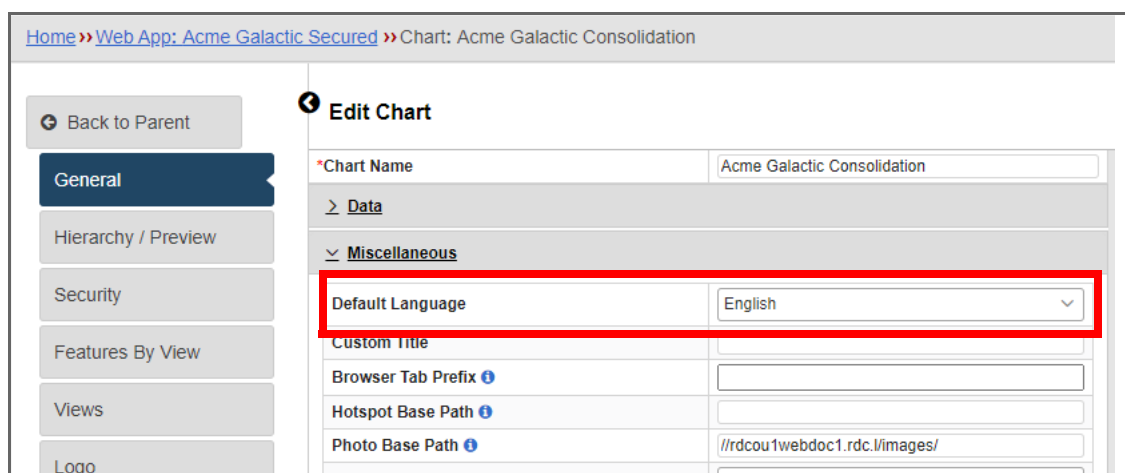


Figure 17: Default Language

Set the Direct Report View Set as the Default

Users with appropriate permissions can now select the **Direct Reports View Default State** setting to open a chart in the Default Report view. The default is not selected.

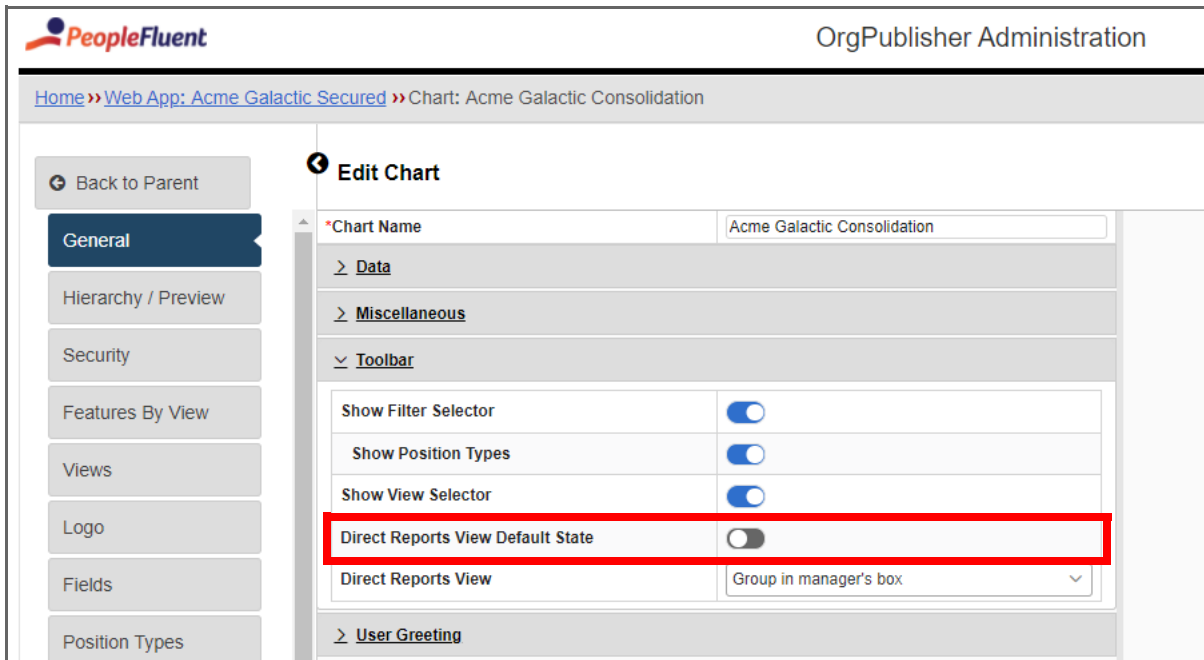


Figure 18: Direct Reports View Default State

Miscellaneous Enhancements

Functionality

These enhancements add support for multiple entry into a secured chart, email notifications for data validation and licensing issues, and copying data validation errors to the clipboard.

Details

Multiple Entry into a Secured Chart

During login, when more than one record in the chart matches the user name, the user is now allowed to select which record to use for the current session. When data is changed and the chart automatically reloads, the user is prompted to select which record to use for the current session. For example, if the previously selected record is no longer in the data or if previously there was only one record matching the user name, but the new data contains multiple matches.

Your user ID is assigned to multiple records in this org chart. Please select the one you'd like to use for this chart viewing session.

Name	Box Title	Job Title	Position Type	Reports to
<input type="radio"/> Edward P Rodriguez	Acme Galactic Transport		Successor	
<input checked="" type="radio"/> Edward P Rodriguez	Finance	CFO	Manager	Kyle O Grimes

Login

Figure 19: Multiple Record Login

Notifications for Data Validation Errors and Licensing Issues

Users with the appropriate permissions can now enable email notifications for data validation and licensing-related errors.

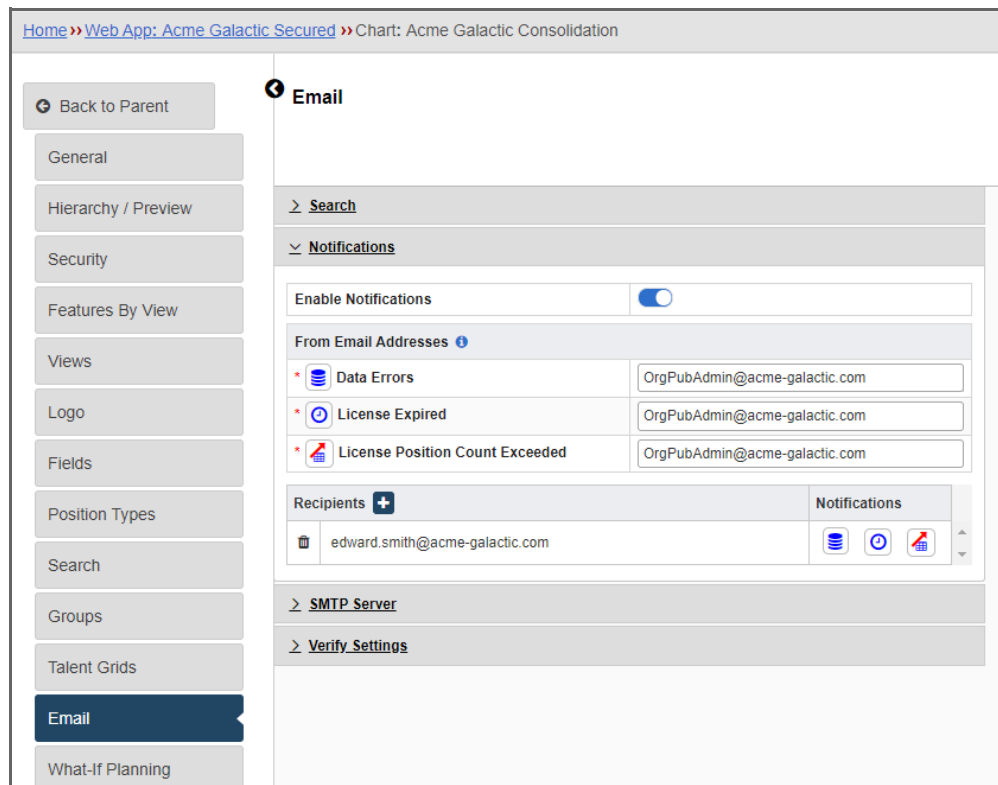


Figure 20: Email Notifications

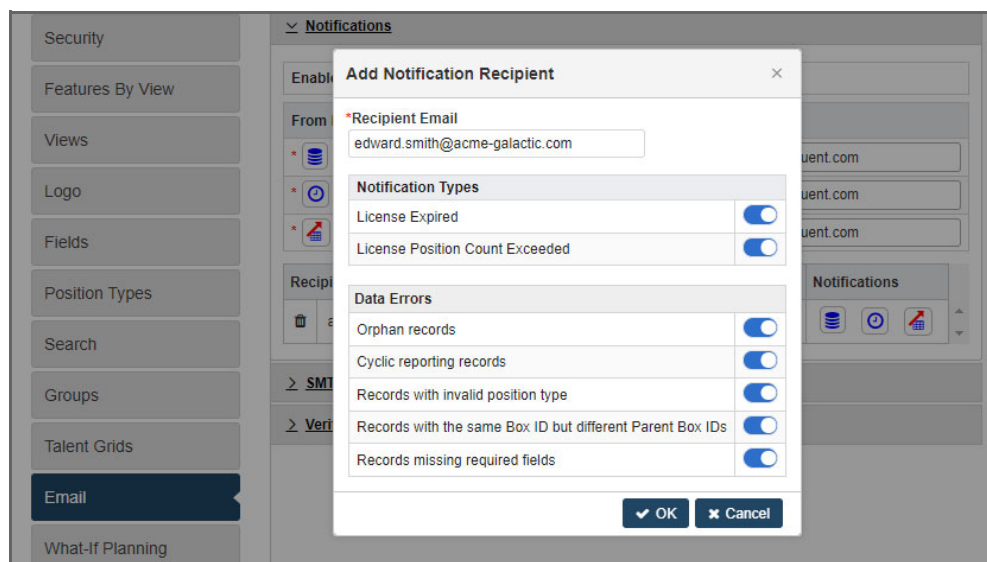


Figure 21: Add Notification Recipient

Copy Data Validation Errors to the Clipboard

Users with appropriate permissions can now click the new **Copy** icon in the Validation Results dialog box to copy data validation errors to the clipboard in JSON format.

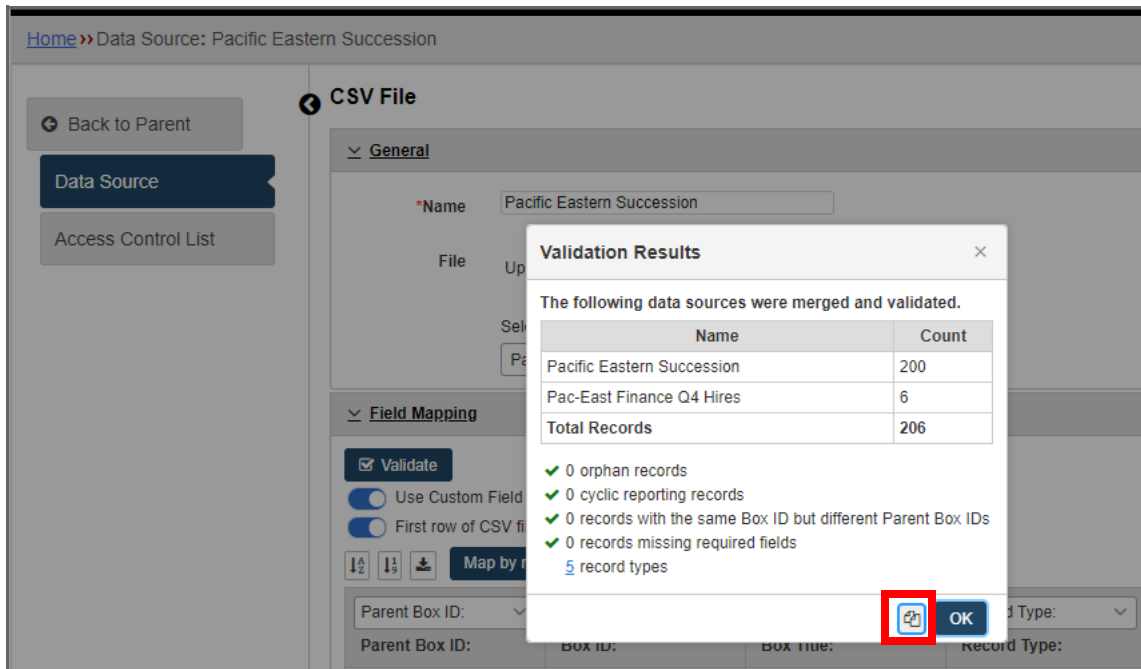


Figure 22: Validation Results Dialog Box

```
[[{
  "description": "0 orphan records",
  "records": []
}, {
  "description": "0 cyclic reporting records",
  "records": []
}, {
  "description": "0 records with the same Box ID but different Parent Box IDs",
  "records": []
}, {
  "description": "0 records missing required fields",
  "records": []
}, {
  "description": "0 records with invalid position type",
  "records": []
}, {
  "description": "5 record types",
  "records": ["E", "C", "M", "A", "<SC>"]
}]]
```

Figure 23: Data Validation Errors in JSON Format

Issues List

The following table includes the client-reported and internally-found issues resolved in this update and reported to clients.

As always, clients can track the status of their service requests on PeopleFluent Customer Community: <https://customers.peoplefluent.com>.

Table 3: Resolved Issues

Issue ID	Internal ID	Description
305587	PFTMP-2645	Fields were not aligned in the formatting box of the chart view. Now box items line up and follow the same grid increments as were used in the legacy application.
308679	PFTMP-2948	Records whose Type field was null or empty were not included in a total position count. Now records with empty Type fields use the selected default position type and are counted.
310361	PFTMP-2870	Previously some chart owners set the line format to use white for line color and shadow to match the background to hide the line.
311053	PFTMP-2869	Field names appeared in search results instead of the field labels. Labels now display as expected.
311119	PFTMP-2882	In What-if Planning, some date fields could not be edited or cleared and caused an error. Date formats are now parsing correctly and allow editing of the date fields.
311131	PFTMP-2877	HTML5 charts and buttons were not labeled correctly and were not recognized with a screen reader. HTML attributes have been added to elements to allow screen readers to detect user interface items.
311333	PFTMP-2860	Last names ending with a dash "-" were interpreted as a null value in group definition. Now groups properly search hyphenated name values.
311876	PFTMP-2907	Custom conditional position type was not consistently causing the correct box formatting to be applied. Now the base position type is used when mapping custom fields for planning data.
314256	PFTMP-3092	Creating a custom Open Position type caused unexpected behavior. Now when comparing position types in groups, if a position is a conditional position type, the application will not override it with a base position type. Any record that has a conditional position type will no longer be included in a group that filters on the record's base position type.
Internal	PFTMP-3211	The Admin APIs returned Type 500 errors when the Charting web app had the word "Planning" in its name. Now the names of charting web apps do not affect Admin API operation.
Internal	PFTMP-2947	Logging in with an open position caused the web app to crash. Now a user is prevented from logging with credentials associated with an open position.

Table 3: Resolved Issues (Continued)

Issue ID	Internal ID	Description
Internal	PFTMP-2852	In a migrated chart, the Direct Report setting gets set to Normal instead of In_Manager_Box or Below_Manager_Box. Now, when a chart is migrated and has Auto Build set to Normal, the Direct Reports option is set to In Box Under Manager, and the Direct Reports toolbar button in the chart viewer works as expected.
Internal	PFTMP-2733	Formatting for the display of negative numbers was not working in the charting web app. Now the admin chart preview, the charting web app, and document exports all honor the field definition formatting for negative numbers.
Internal	PFTMP-2609	Creating a charting web app while logged into the admin web app stopped the app pool for the admin web app. Now the admin web app is recycled after making changes to charting web apps.
Internal	PFTMP-1497	In What-if Planning, the Action popup did not close on clicks outside of the initiating box or the popup, which limited scrolling and some operations with the Scratchpad.
Internal	PFTMP-653	While scrolling down to view additional fields on a view's profile in the Admin web app, the panel header scrolled off the page. Now it stays at the top of the field list as you scroll.
Internal	PFTMP-318	Empty filter categories appeared in the toolbar filter drop-down and in the search dialog. Empty categories are now hidden in both places.
Internal	PFTMP-52	When generating an ad hoc report of a chart with a centered background image, the image appeared to the far right of the page. Now the image renders in the correct location.

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 4: 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.

About PeopleFluent

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Our talent solutions unify talent processes within a collaborative experience that enables HR and L&D teams to guide managers and employees with contextual learning—right in the flow of work.

A part of [Learning Technologies Group plc \(LTG\)](#), PeopleFluent provides world-class service and an unparalleled ecosystem of partners to optimize employee experience, employer brand, and business results.

For more, visit peoplefluent.com

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