

OrgPublisher OrgHistory



OrgPublisher 10 Training

Copyright 2002 – 2011 All Rights Reserved by Aquire

OrgPublisher™, OrgPublisher Premier™, Unifi™, Mobile OrgPublisher™, and Pocket OrgPublisher™ are trademarks of Aquire in the United States and other countries.

Microsoft®, Windows®, Internet Explorer, Pocket PC 2002 platform, and ActiveSync®, are either registered trademarks or trademarks of Microsoft Corporation in the United States and other countries.

Netscape® and the Netscape N and Ship's Wheel logos are registered trademarks of Netscape Communications Corporation in the United States and other countries.

Blackberry™, RIM850™, RIM857™, RIM950™, and RIM957™ are either registered trademarks or trademarks of Research in Motion Limited (RIM) in Canada and other countries.

Palm™, Palm OS®, and HotSync® are either registered trademarks or trademarks of Palm, Inc. in the United States and other countries.

JAWS® for Windows is a registered trademark of Freedom Scientific in the United States and other countries.

SAP® and mySAP™ are trademarks or registered trademarks of SAP AG in Germany and in several other countries all over the world.

Table of Contents

- 1 OrgHistory 1
 - 1.1 Technical notes..... 1
 - 1.2 Position ID Custom Field Type..... 1
- 2 Archiving a Chart..... 2
 - 2.1 Schedule Archiving..... 3
- 3 Using Archived Charts..... 4
 - 3.1 Browse 4
 - 3.2 Compare 5
- 4 Compare 2 Charts..... 8
- 5 Comparison Report Output..... 9
 - 5.1 General Summary - Chart 9
 - 5.2 General Summary – By Manager10
 - 5.3 Position Modifications10

1 OrgHistory

OrgHistory provides a scheduled method for preserving hierarchical information over time. The archived charts along with the Compare two charts feature create a report history of changes over a range of time – for a specific organization or the whole company.

1.1 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 (amount of custom fields, order of custom fields and types of custom fields) to report properly.

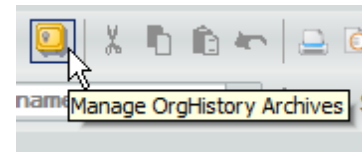
1.2 Position ID Custom Field Type

A unique number for each record across all charts and including Open Positions should be created. This number remains with that person/record. A custom field type of Position ID is available for use in comparing and reporting on planning files. This field can be mapped or passed in with the data into field 17.

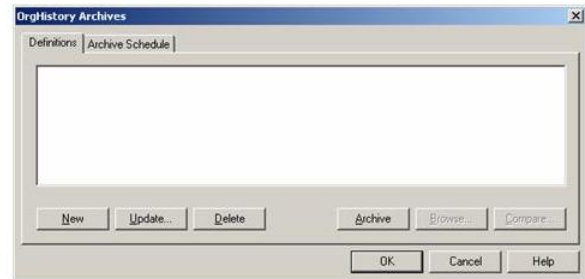
Please note: If the charts you are comparing do not contain a custom Position ID type, OrgPublisher uses the ID in field 5 (employee id). If neither exists, an error message displays and the comparison does not occur.

2 Archiving a Chart

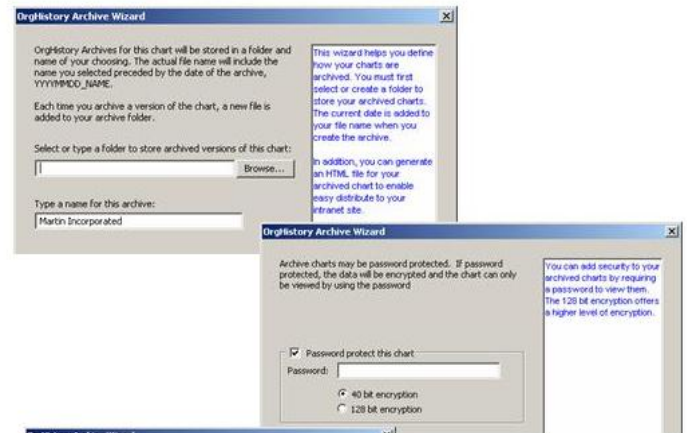
- Select Tools, then Manage History Archives . . . OR
- Select the Manage History Archives button . . . OR
- Setup archiving in the publishing wizard



- The wizard guides you through – Click New . . . to begin.



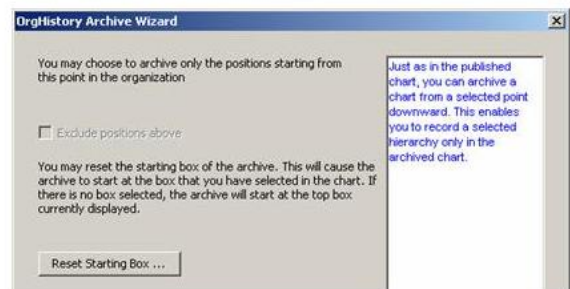
- Identify the storage location on your network.
- Identify if you want Password Protection.



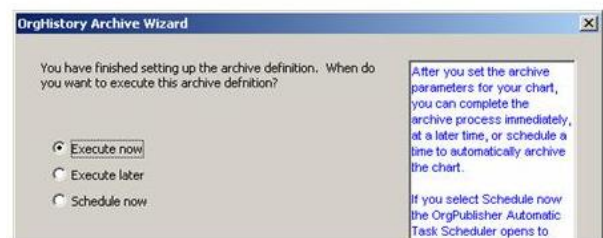
- Indicate signed to verify that the chart has not been changed and can't be changed.
- Indicate if the file is to be marked as Read Only.



- Select a portion of the chart to be archived (if desired).

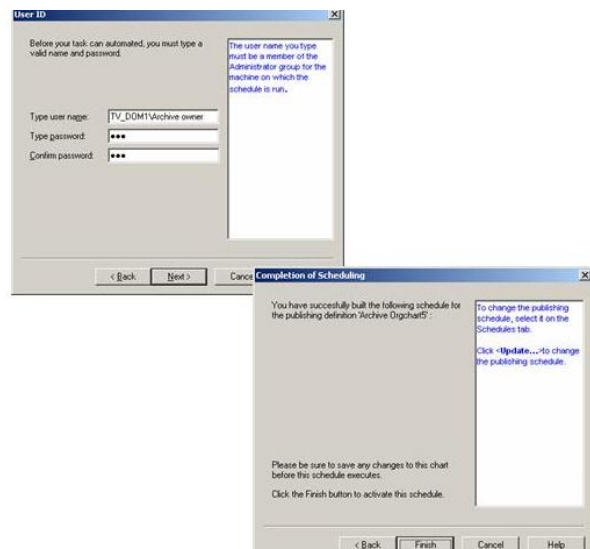
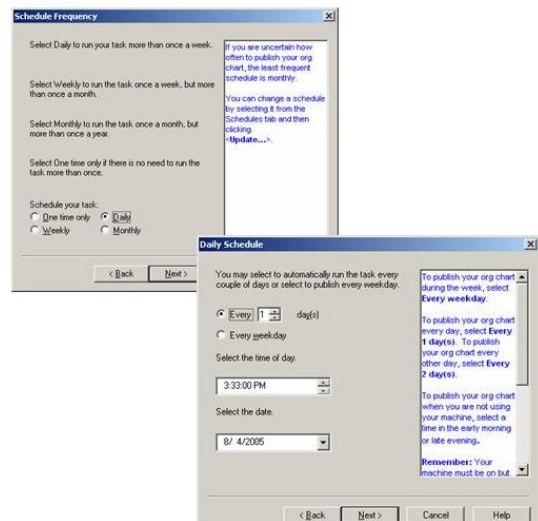
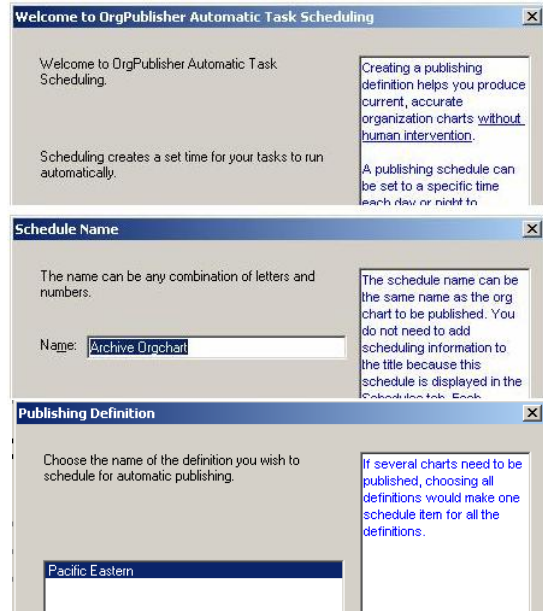


- Determine to Execute or Schedule now.



2.1 Schedule Archiving

- If the Schedule option was selected, a scheduling wizard begins.
- Provide a name for the schedule.
- Select which defined archive to schedule.
- Select frequency.
- The following screen varies based on the option selected above.
- Type in the user name and password.
- A confirmation screen appears.

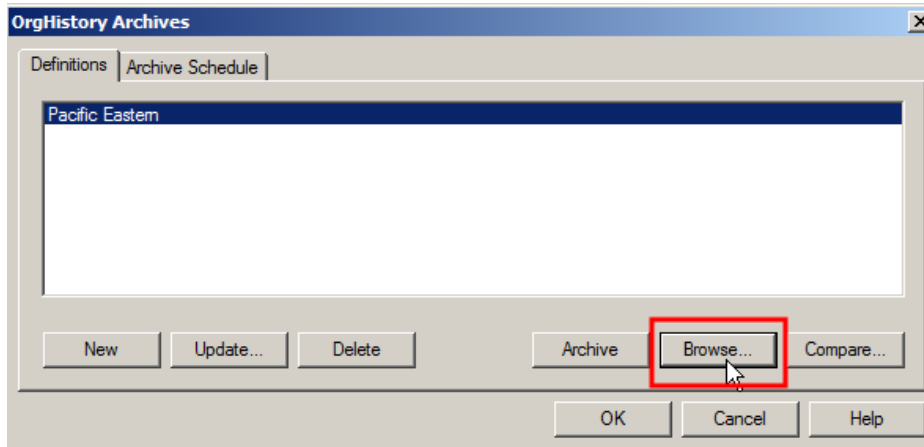


3 Using Archived Charts

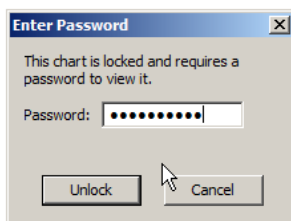
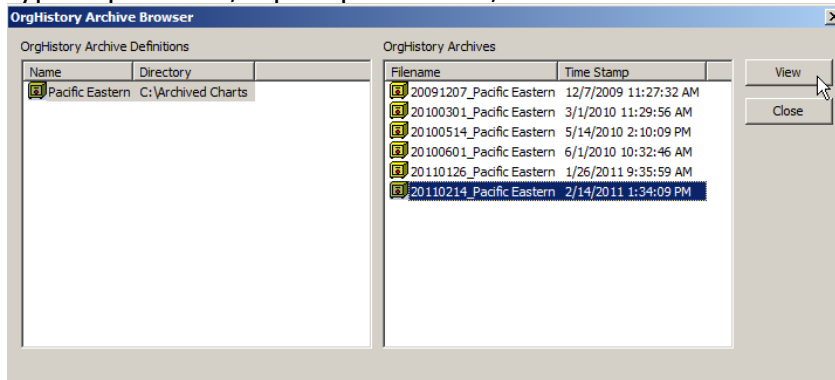
As a chart administrator, you may browse and open archived charts. You also can compare 2 charts. This produces a report of differences between the two charts.

3.1 Browse

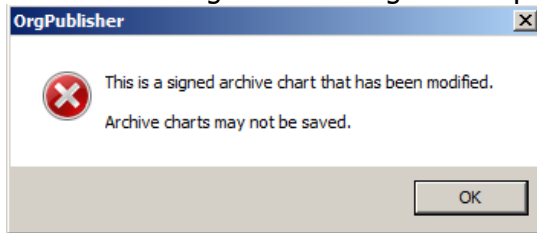
1. Select the Manage OrgHistory Archives.
2. Select an archive definition, then select Browse.



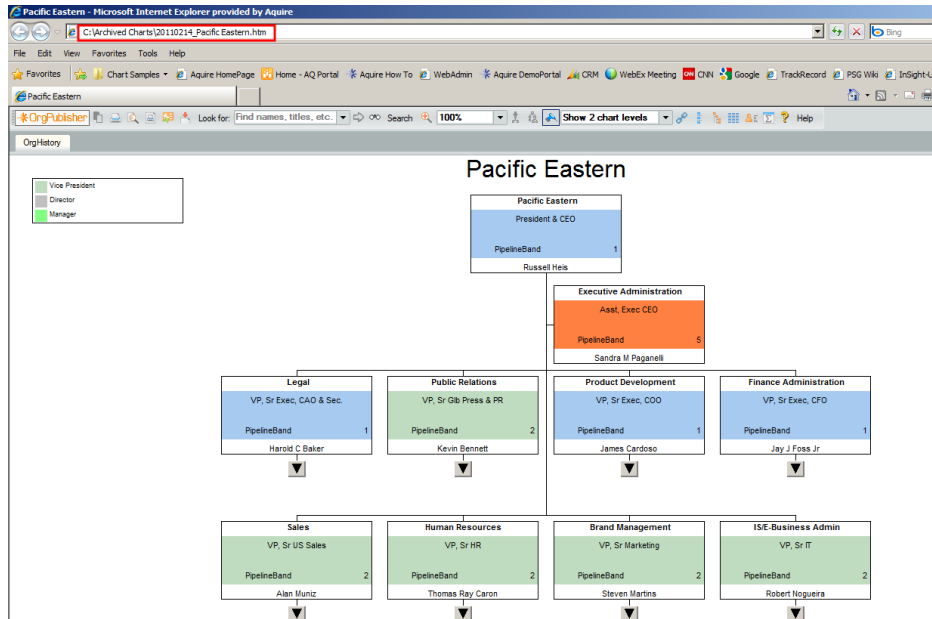
3. Select an OrgHistory file, then select View.
4. Type in password, if prompted. Then, select Unlock.



- If the chart is signed a message will display. Select OK.

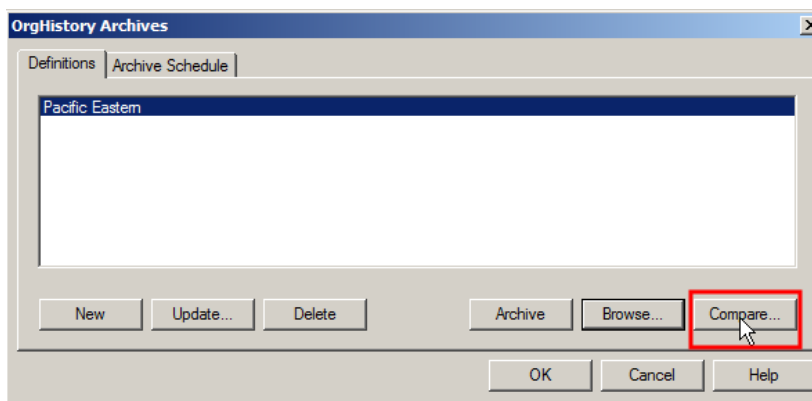


- The requested chart will display in your browser. In the address line, the file name is displayed. This chart was archived on February 14, 2011.

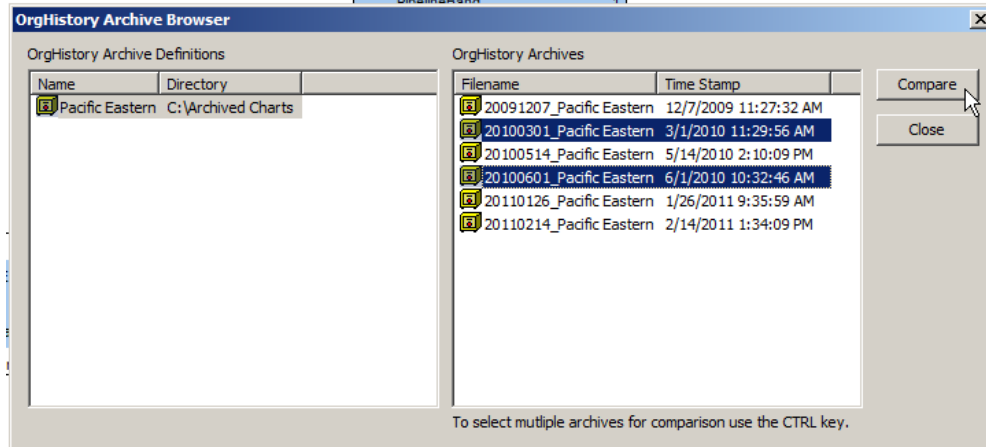


3.2 Compare

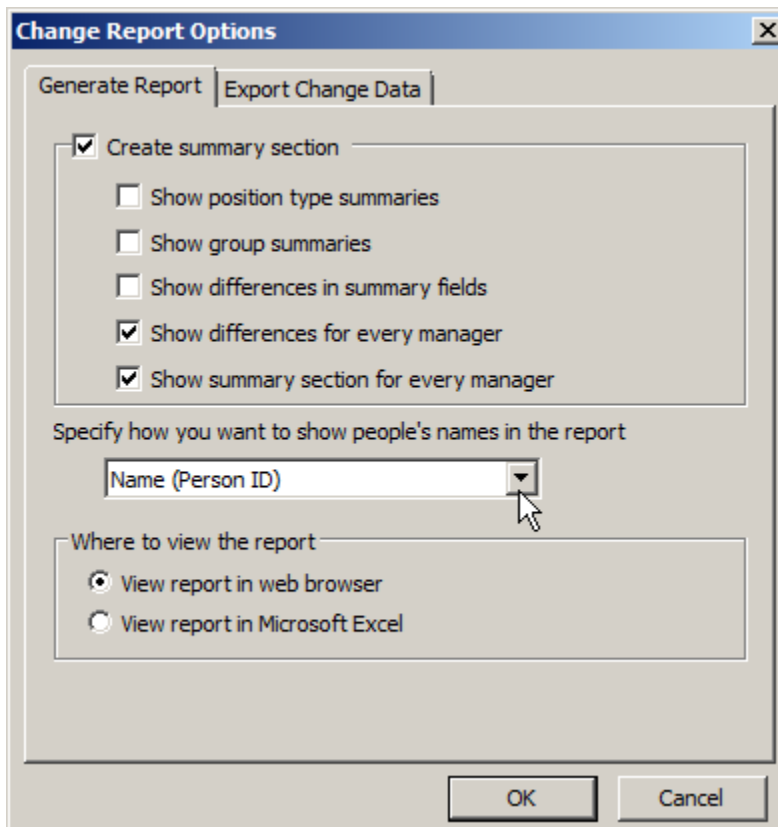
- Select the Manage OrgHistory Archives.



2. Select an OrgHistory file, then hold the Ctrl key down and select a 2nd file. Select Compare.

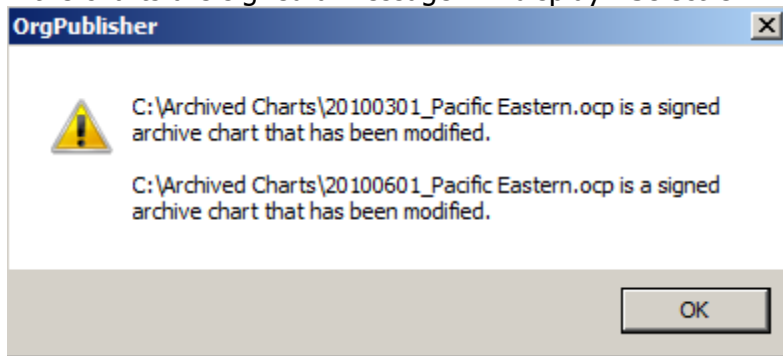


3. Select the output options and how you wish for the results to display.

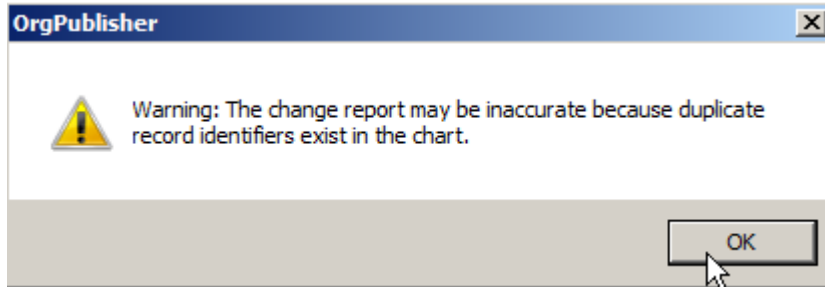


4. Type in password, if prompted. Then, select Unlock. If the 2nd chart is password protected, you will be prompted to supply that password and then select Unlock.

5. If the charts are signed a message will display. Select OK.



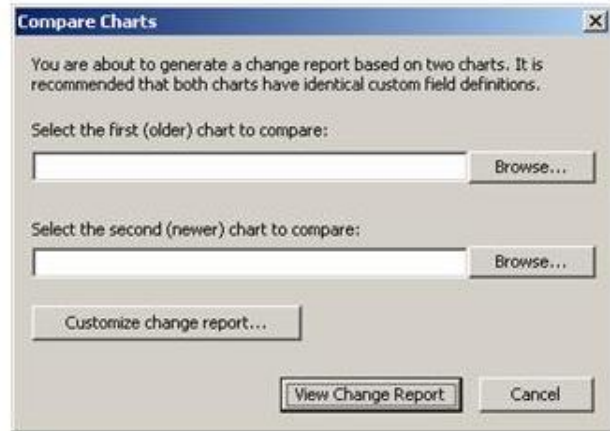
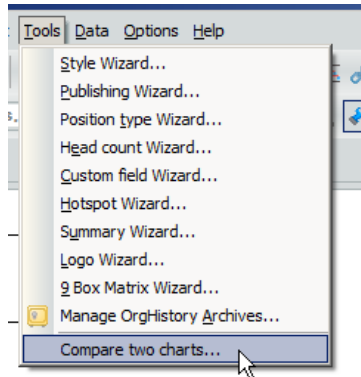
6. If you did not use Position ID's in the data, then you may receive this message if you have people holding more than one position. Without a Position ID field, then OrgPublisher is relying on Employee ID data for tracking. If two records have the same Employee ID, OrgPublisher may not accurately depict which record was involved in a move or deleted.



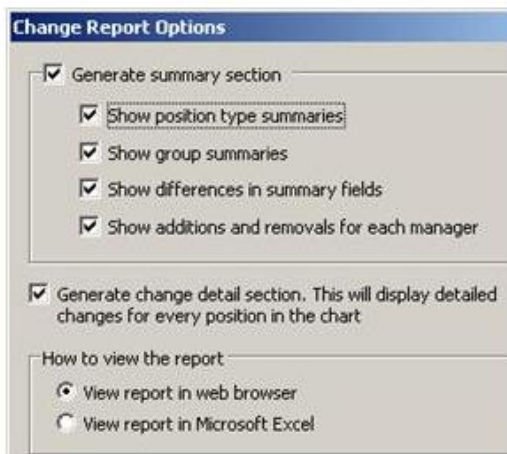
7. The comparison report will display as you indicated. See the section on Comparison Report output samples for a synopsis on each output section.

4 Compare 2 Charts

- Select Tools, then Compare 2 charts . . .
- Locate the two charts.



- Customize change report (uses same change reports as OrgPlan)
- Select View Change Report.



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%)

5 Comparison Report Output

The change report has several sections you can choose to display. The options are set by the chart administrator. The Option window and sample results are provided below.

5.1 General Summary - Chart

The summary options selected (to the right) display the name of the Position Types, then names of the Groups and the differences in the Summary Fields for the whole chart. The counts **Before** (in the oldest chart) and the counts **After** (in the newest chart) are displayed. A percentage of change is also provided.

Change Report Options

Generate Report | Export Change Data

Create summary section

- Show position type summaries
- Show group summaries
- Show differences in summary fields
- Show differences for every manager
- Show summary section for every manager

Specify how you want to show people's names in the report

Box title - Name Name

Where to view the report

View report in web browser

View report in Microsoft Excel

OK Cancel

A summary of changes for each box is also displayed in this report.

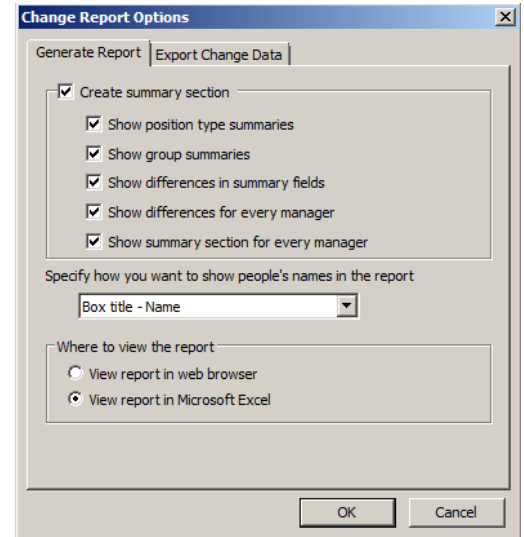
	A	B	C	D	E
4	General summary for chart				
5					
6	Position type summary	Before	After	Change (%)	
7	Open position	27	60	33 (122%)	
8	Manager	60	61	1 (1%)	
9	Employee	959	935	-24 (-2%)	
10	Assistant	11	11	0 (0%)	
11	CEO	1	1	0 (0%)	
12	Sales Mgr	1	1	0 (0%)	
13	Sales Team	92	82	-10 (-10%)	
14	Vice President	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%)	

5.2 General Summary – By Manager

By selecting the **Show differences for every manager** option, the following additional information is added to the report for each manager.

This summary displays the name of the Position Types, then names of the Groups and the differences in the Summary Fields for the whole chart. The counts **Before** (in the oldest chart) and the counts **After** (in the newest chart) are displayed. A percentage of change is also provided.

A summary of changes for each box is also displayed in this report.



Summary of changes for Sales - Sales - Alan Muniz				
928	Position type summary	Before	After	Change (%)
929	Open position	10	20	10 (100%)
930	Sales Team	92	82	-10 (-10%)
932	Group summary	Before	After	Change (%)
933	Absences	95	113	18 (18%)
934	TimeToFill	12	11	-1 (-8%)
935	OpenPositions	10	20	10 (100%)
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%)
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			

5.3 Position Modifications

Each Summary option provides a detailed list of changes for each chart box.

The following positions were modified

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